

Chain Sites

Procedural Guide

When managing multiple locations, you can chain your sites, allowing side-by-side reports to be run.

1 - Setup

Log in to the site you want to run chained reports from. You can repeat this setup on the other site if you want chained reports to be available from both.


- You'll need to have the URL of the other site available (including the virtual directory - example: <https://remotesite.com/jwebPOS>, or <http://remotesite.com/jwebPOS> if you do not have a SSL Certificate yet.)

- You will also need access to a user name and password at the other location.

Using the Navigation Bar, go to Edit/New, then the Chain Sites Setup button.



Chain Sites Setup

Add a site by using the  button, then provide the name of the other location.

A dialog box titled "New Chain Site" with a close button (x) in the top right corner. It contains a text input field labeled "Name" and two buttons at the bottom: "Ok" and "Cancel".

Add the URL of the location in the format of the earlier example, as well as the credentials of your account at the other location.

Local ID should start at 1.

A form titled "Edit: Chain (Site)" with a dark header bar containing a menu icon, a grid icon, a checkmark icon, and a close icon (x). Below the header, there is a "Select Site..." dropdown menu and a plus button. The form contains several input fields: "Site Name", "URL", "Local ID", "User Name", and "Password". At the bottom, there are three checked checkboxes: "Altria Report", "RJR Report", and "Active".

If you do not need Altria nor RJR reporting, you can uncheck those boxes.

If you wish to not receive chained-site reporting notifications on reports run at this location, you can uncheck Active.

Click the checkmark at the top bar to save your changes.

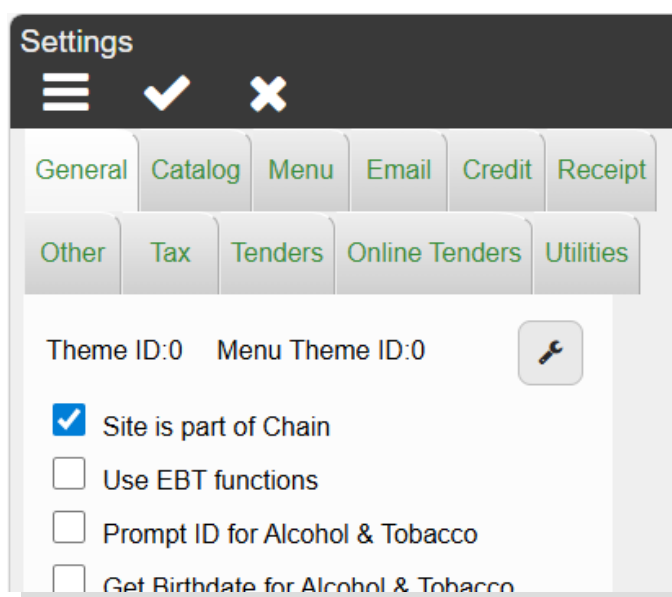
New chained sites require an additional step:

Navigate to Edit/New, then open General Settings.



General Settings

On the General Tab (page opens to this by default), activate the checkbox: the Site is part of Chain.

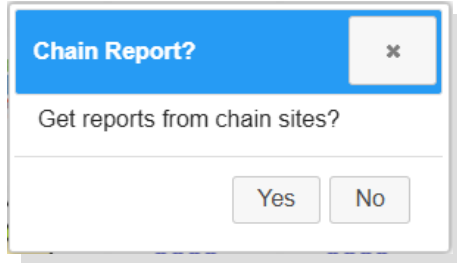


Use the checkmark at the top navbar to save your changes.

You will need to log out or close and relaunch your browser to have access to new chain site reports.

2 - Chain Site Reports

To run a report that pulls from chain sites, run a Sales Report (example: Gross, Department). You should see a window like this:



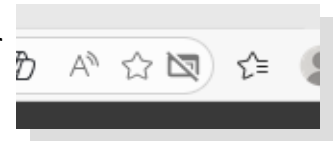
"Yes" will create a report in a browser tab for each site you have in your chain:




3 - Troubleshooting

If you only get one site's report, your browser may be blocking multiple tabs from opening at once.

On Microsoft Edge, on the right end of the address bar, look for a Pop-up Blocked icon.



Click on the  button, then select the option:



Close the incomplete report tabs, then run the report again.