

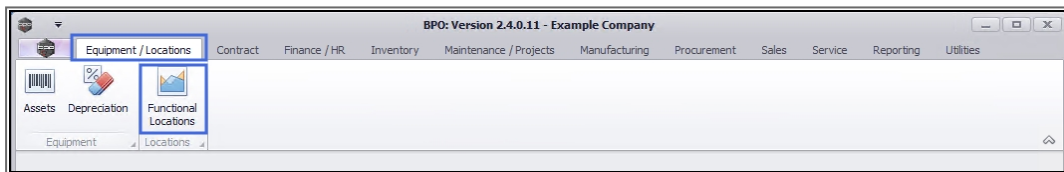
LOCATIONS

FUNCTIONAL LOCATIONS – ADD NEW 'GENERIC' LOCATION

Generic Locations are set up to determine an 'in-house area' where work is performed, for example, a 'workshop'. These can also be locations that determine an area/suburb/region where a New Deal is being performed or where a contract is located.

Follow the process below to add a **new** generic location.

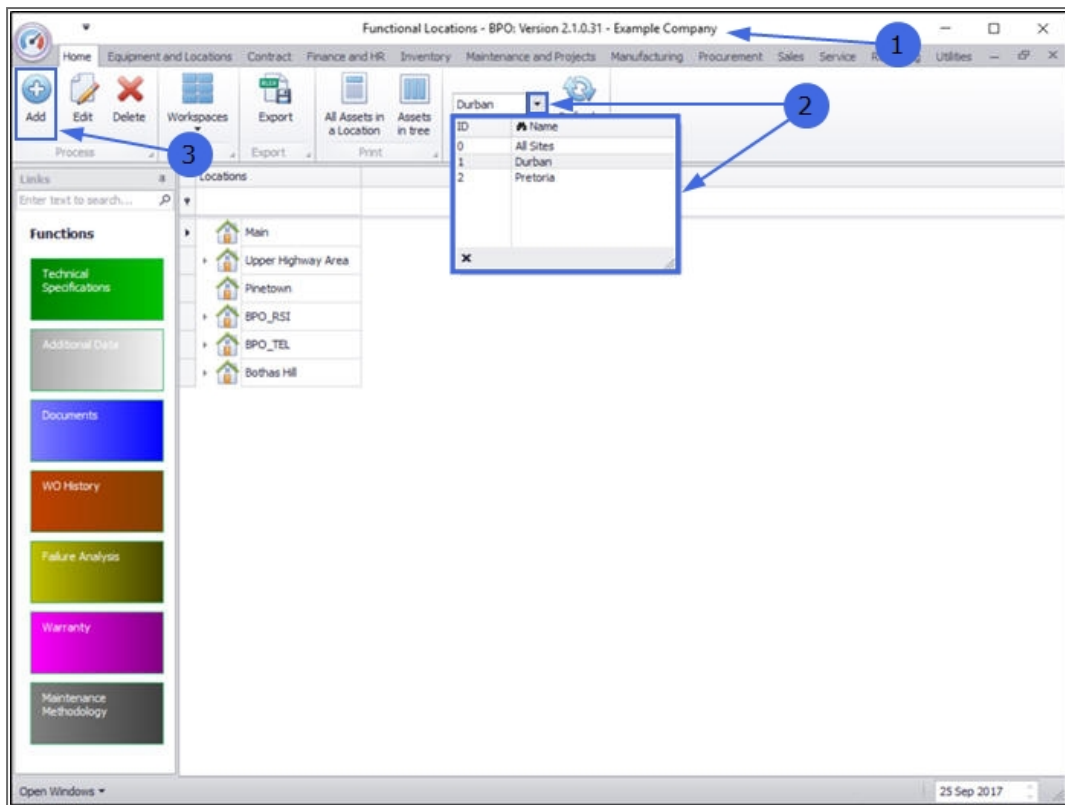
Ribbon Access: *Equipment / Locations > Functional Locations*



1. The **Functional Locations** screen will be displayed.

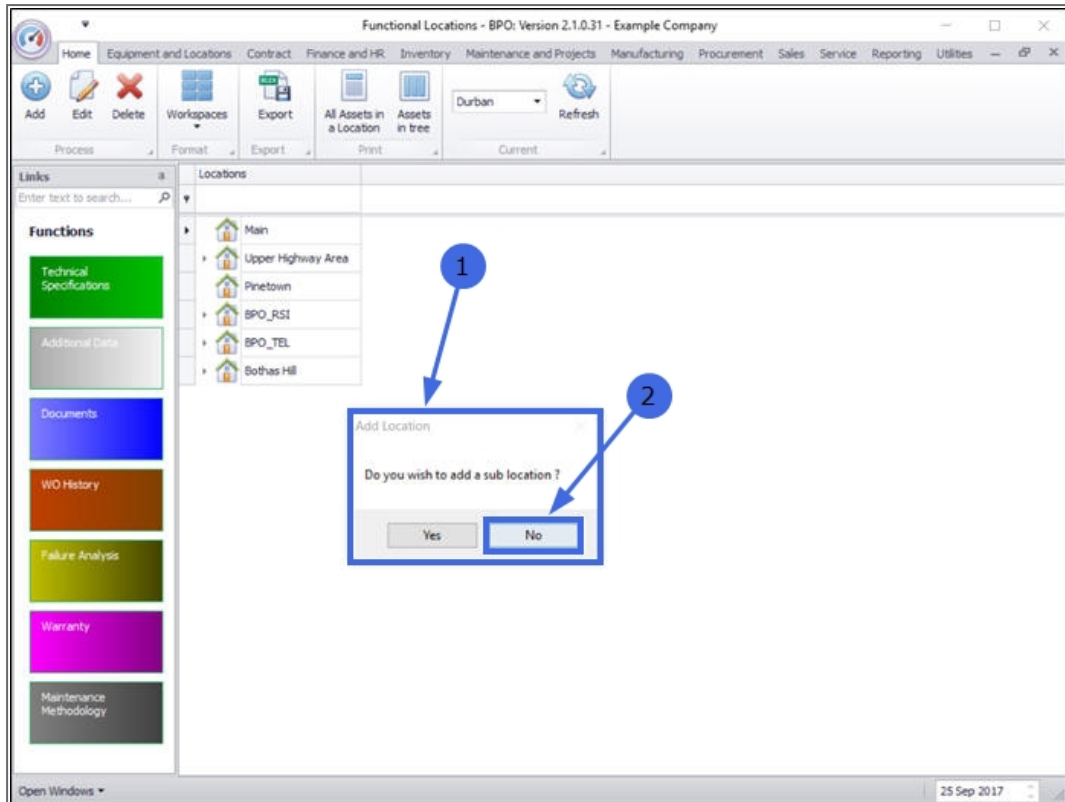
SELECT THE SITE

2. The **Site** filter will be set according to your company configuration.
Click on the drop-down arrow and select the **Site** you wish to work in.
 - In this image **Durban** has been selected.
 - [For a detailed handling of this topic refer to Site Selection.](#)
3. Click on **Add**.



SELECT LOCATION TYPE

1. An **Add Location** message box will pop up with the following prompt:
 - *Do you wish to add a sub-location?*
2. Click on **No**, as in this example, we wish to set up a **main** location not a sub-location.

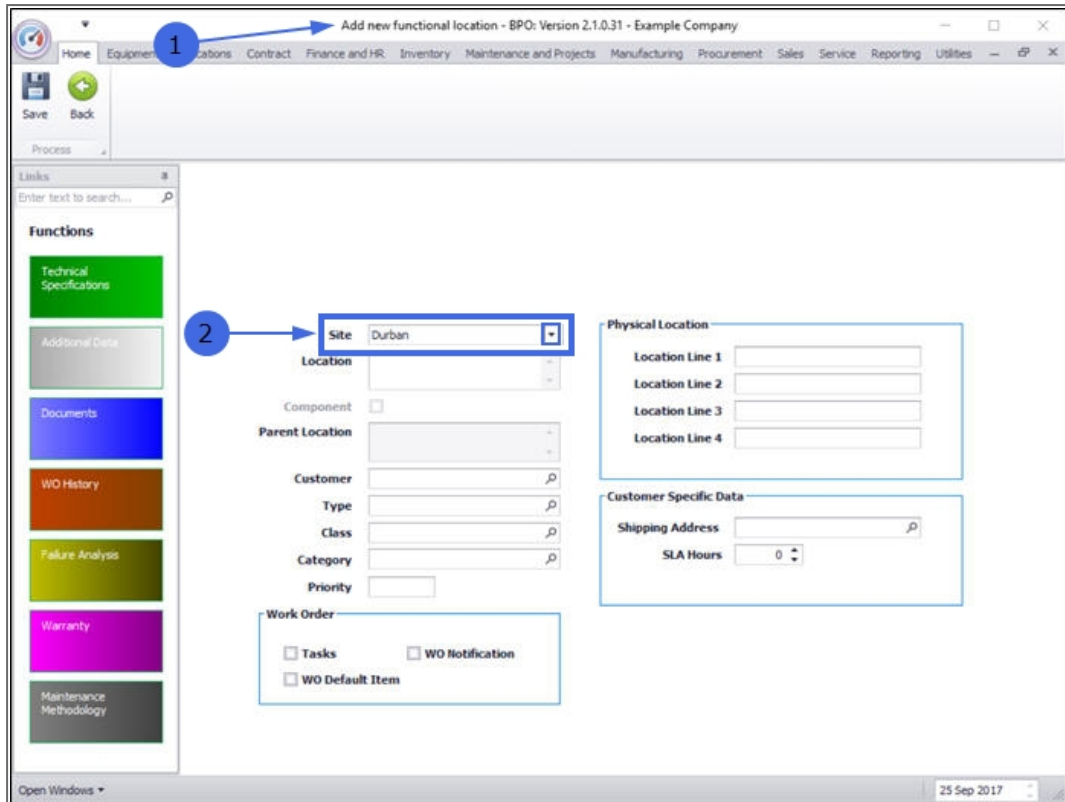


ADD NEW FUNCTIONAL LOCATION

1. The **Add new functional location** screen will open.

LINK SITE

2. The **Site** field will be auto populated with your original site selection, but you can click on the **drop-down arrow** in the Site field and select an alternative site from the drop-down list, if required.



1 → Add new functional location - BPO: Version 2.1.0.31 - Example Company

2 → Site: Durban

Location:

Component: ☐

Parent Location:

Customer:

Type:

Class:

Category:

Priority:

Physical Location:

Location Line 1:

Location Line 2:

Location Line 3:

Location Line 4:

Customer Specific Data:

Shipping Address:

SLA Hours: 0

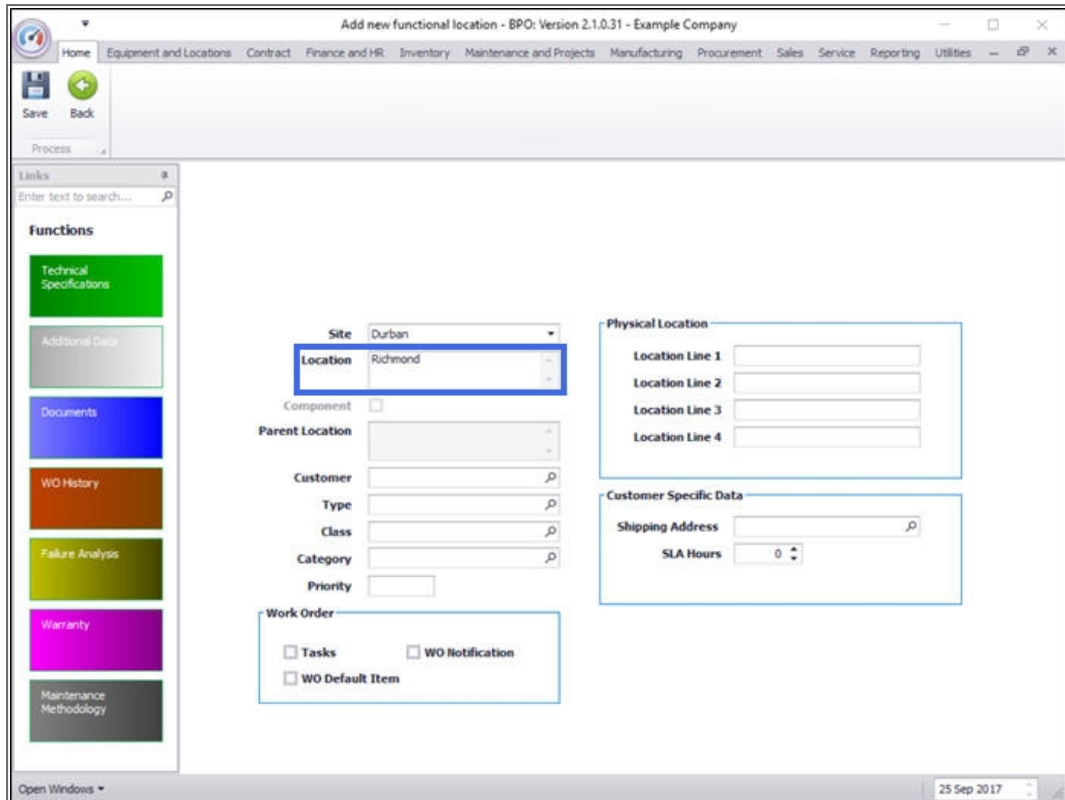
Work Order:

☐ Tasks ☐ WO Notification

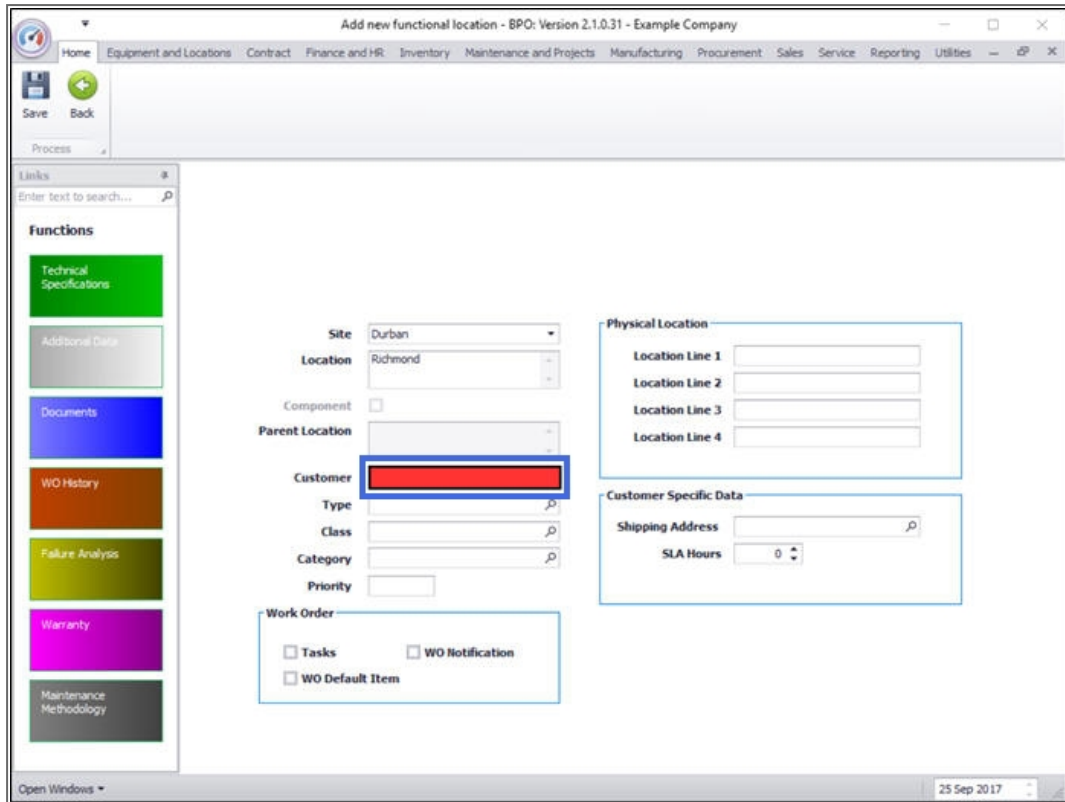
☐ WO Default Item

LINK LOCATION

- In the **Location** field, type in the location description.



- Leave the **Customer** field blank as you are creating a generic location.



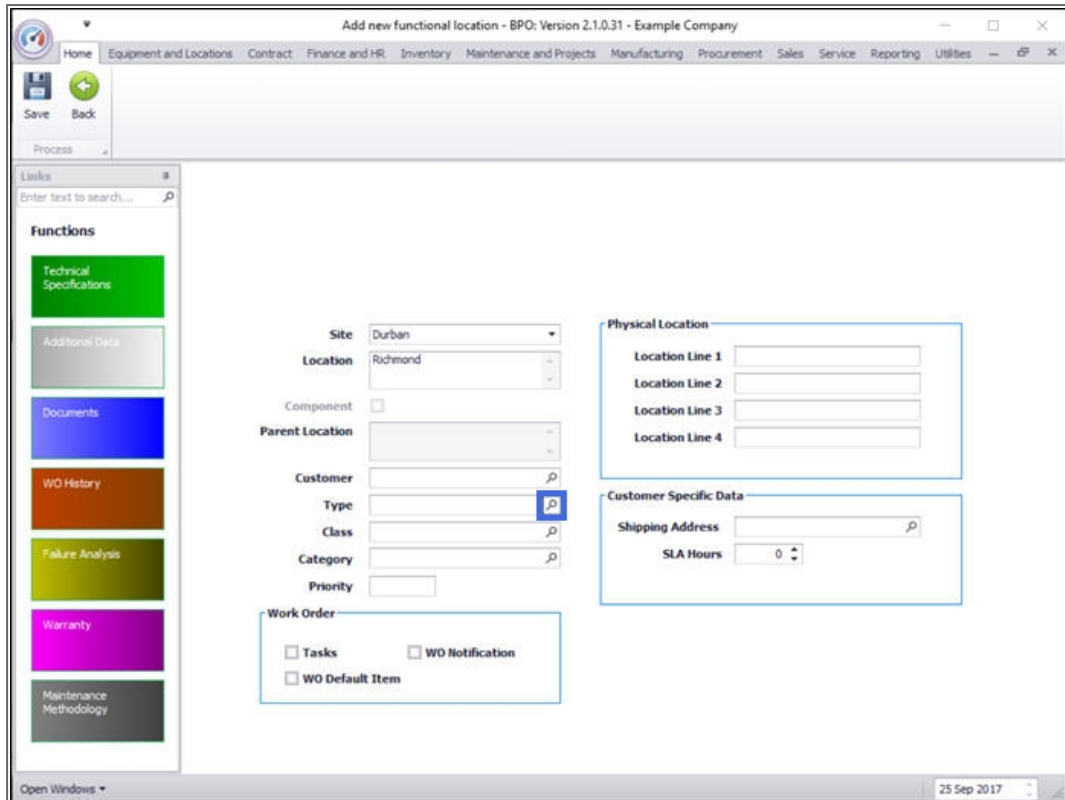
The screenshot shows a web-based form titled "Add new functional location - BPO: Version 2.1.0.31 - Example Company". The form is divided into several sections:

- Site:** A dropdown menu with "Durban" selected.
- Location:** A dropdown menu with "Richmond" selected.
- Component:** A checkbox that is currently unchecked.
- Parent Location:** A dropdown menu.
- Customer:** A dropdown menu with a red box highlighting the search button.
- Type:** A dropdown menu.
- Class:** A dropdown menu.
- Category:** A dropdown menu.
- Priority:** A text input field.
- Physical Location:** A section containing four text input fields labeled "Location Line 1", "Location Line 2", "Location Line 3", and "Location Line 4".
- Customer Specific Data:** A section containing a "Shipping Address" text input field and an "SLA Hours" spinner control.
- Work Order:** A section containing three checkboxes: "Tasks", "WO Notification", and "WO Default Item".

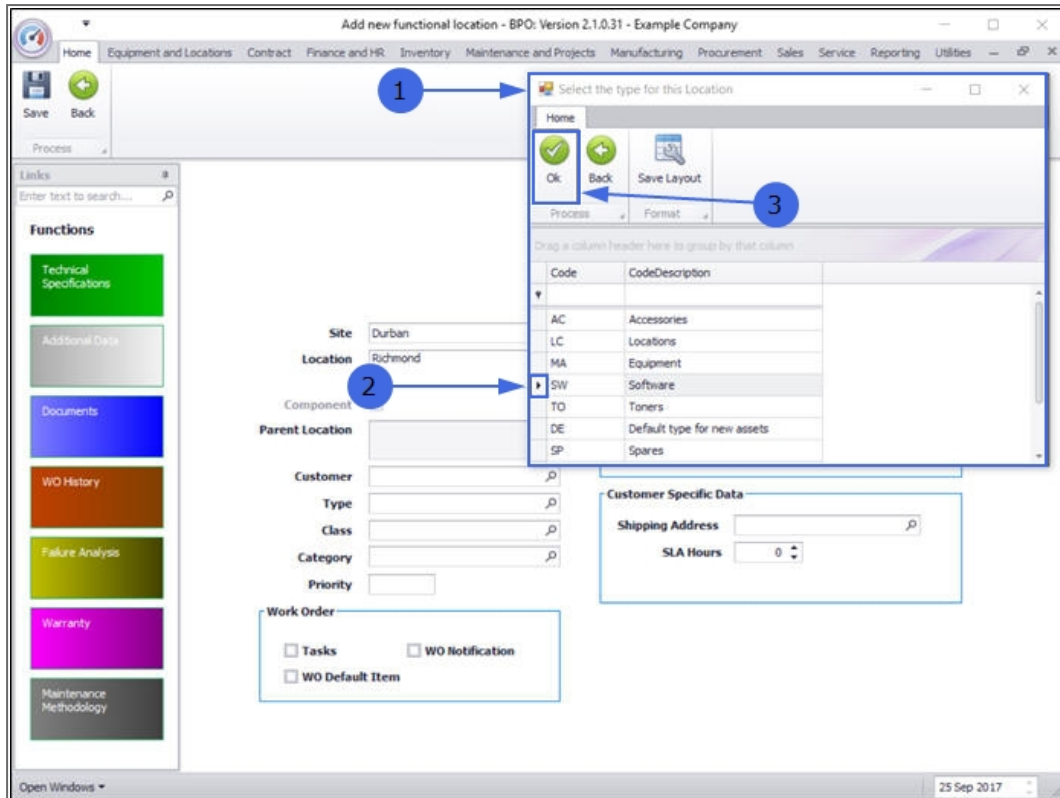
On the left side of the form, there is a sidebar with a search bar and a list of functions: Technical Specifications, Additional Data, Documents, WO History, Failure Analysis, Warranty, and Maintenance Methodology.

SELECT TYPE

- Click on the search button in the **Type** field.



1. The **Select the type for this Location** screen will pop up.
2. Select the **row** of the type you wish to assign to this location.
3. Click on **Ok**.



1

2

3

Site: Durban

Location: Richmond

Component:

Parent Location:

Customer:

Type:

Class:

Category:

Priority:

Work Order:

☐ Tasks ☐ WO Notification

☐ WO Default Item

Customer Specific Data:

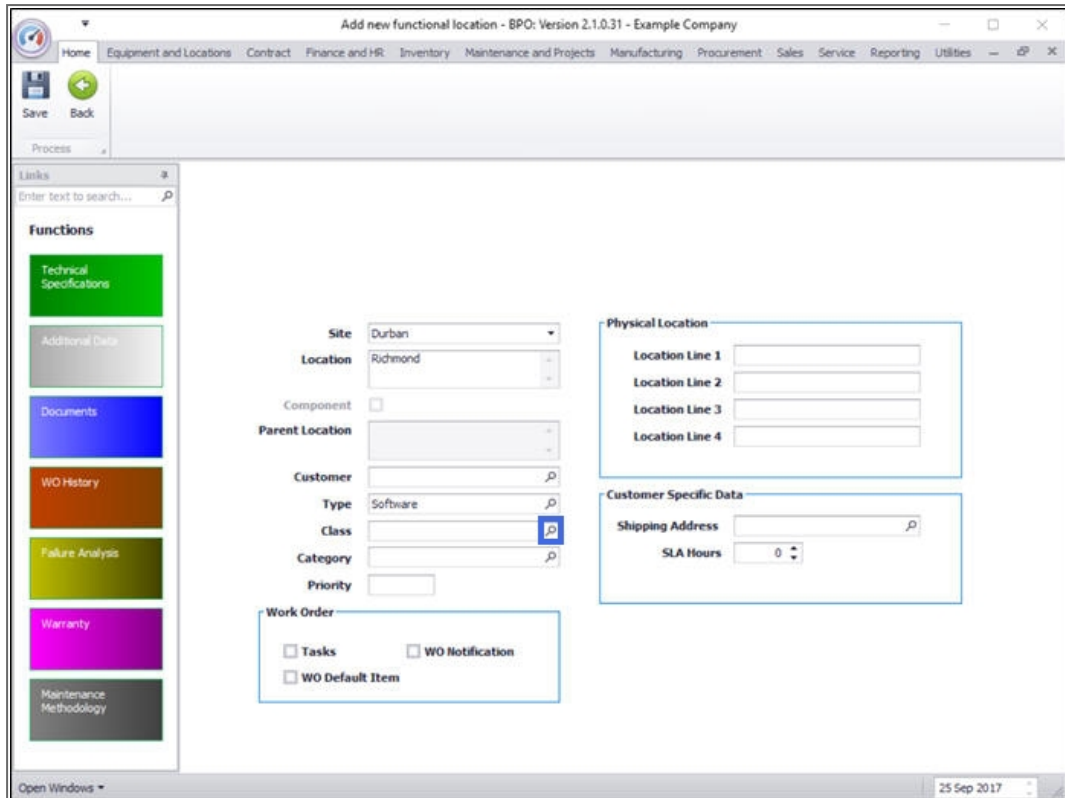
Shipping Address:

SLA Hours: 0

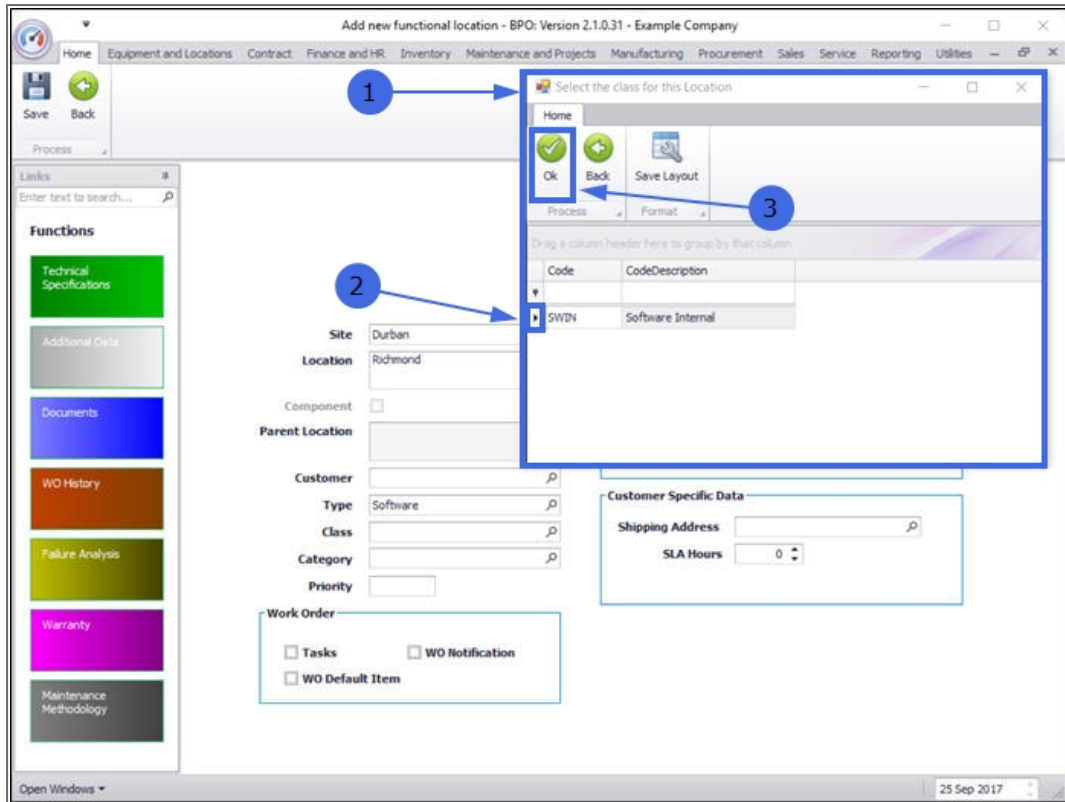
Code	CodeDescription
AC	Accessories
LC	Locations
MA	Equipment
SW	Software
TO	Toners
DE	Default type for new assets
SP	Spares

SELECT CLASS

- Click on the search button in the **Class** field.



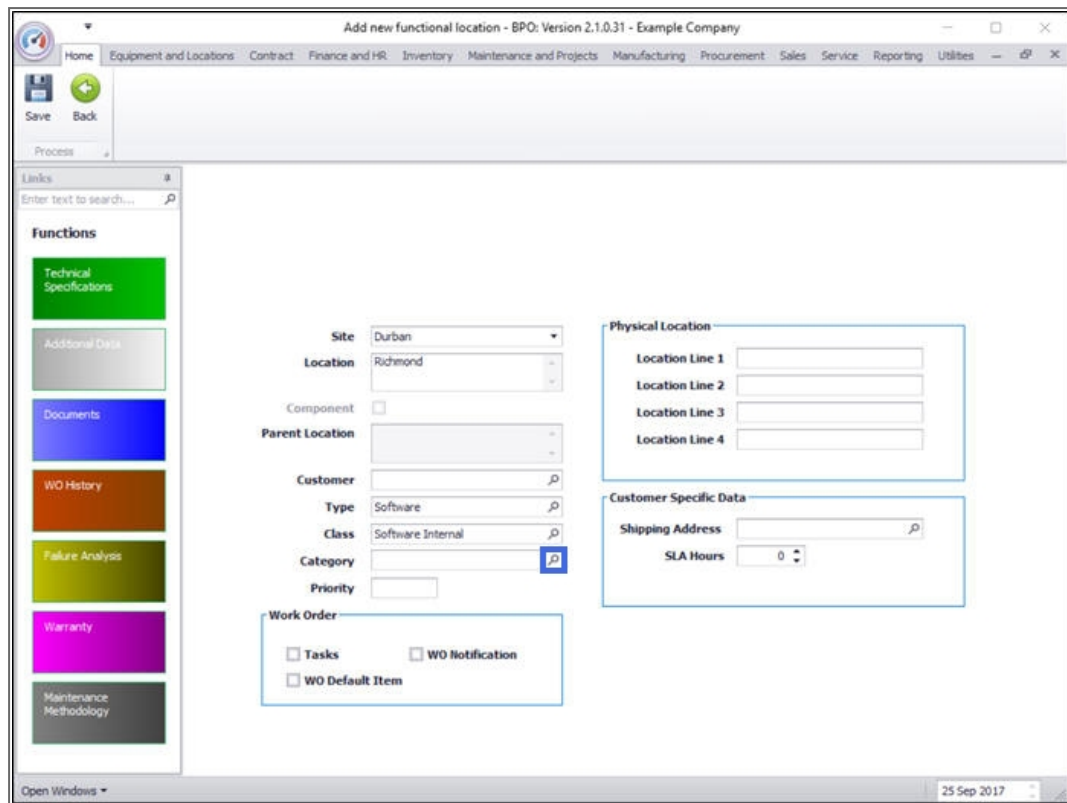
1. The **Select the class for this Location** screen will pop up.
2. Select the **row** of the class you wish to assign to this Location.
3. Click on **Ok**.



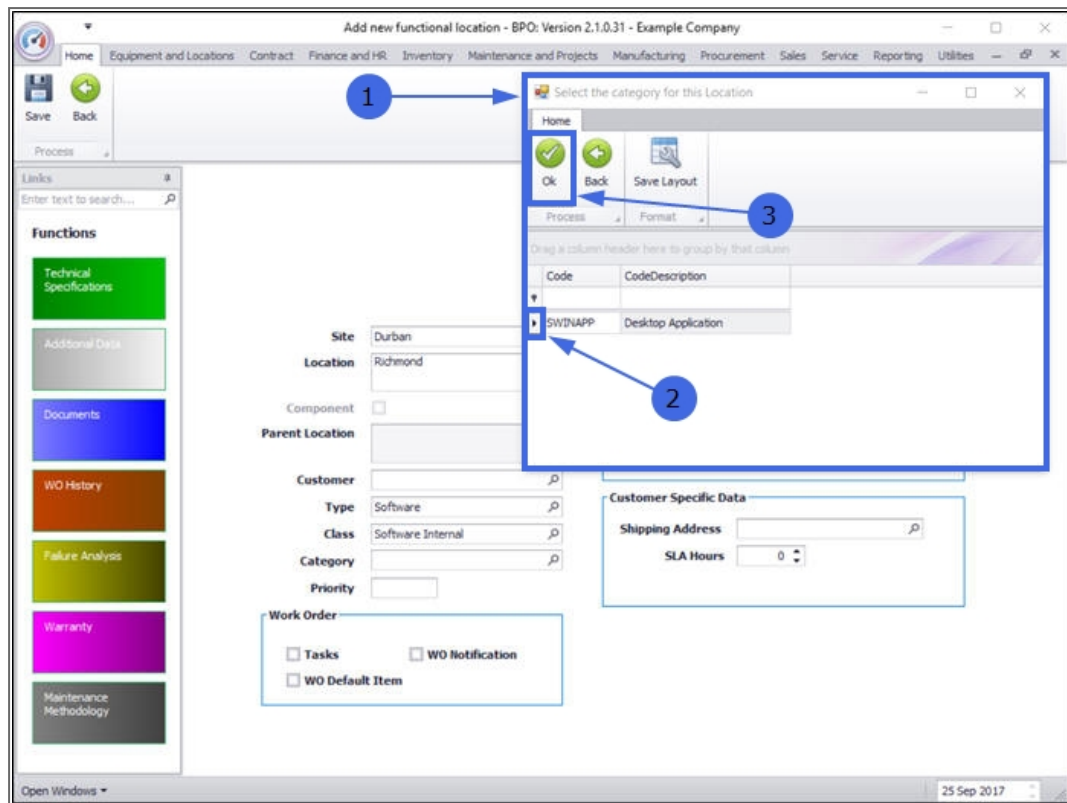
The screenshot shows the 'Add new functional location' form in the CO3 system. The form is titled 'Add new functional location - BPO: Version 2.1.0.31 - Example Company'. It features a top navigation bar with tabs for Home, Equipment and Locations, Contract, Finance and HR, Inventory, Maintenance and Projects, Manufacturing, Procurement, Sales, Service, Reporting, and Utilities. A left sidebar contains a 'Links' section with a search bar and a 'Functions' section with buttons for Technical Specifications, Additional Data, Documents, WO History, Failure Analysis, Warranty, and Maintenance Methodology. The main form area includes fields for Site (Durban), Location (Richmond), Component, Parent Location, Customer, Type (Software), Class, Category, and Priority. A 'Work Order' section contains checkboxes for Tasks, WO Notification, and WO Default Item. A 'Customer Specific Data' section includes fields for Shipping Address and SLA Hours. A modal window titled 'Select the class for this Location' is open, showing a table with columns 'Code' and 'CodeDescription'. The table contains one row with 'SWIN' and 'Software Internal'. The modal has buttons for 'Ok', 'Back', and 'Save Layout'. Numbered callouts indicate: 1. The 'Ok' button in the modal; 2. The 'Category' field in the main form; 3. The 'Save Layout' button in the modal.

SELECT CATEGORY

- Click on the search button in the **Category** field.



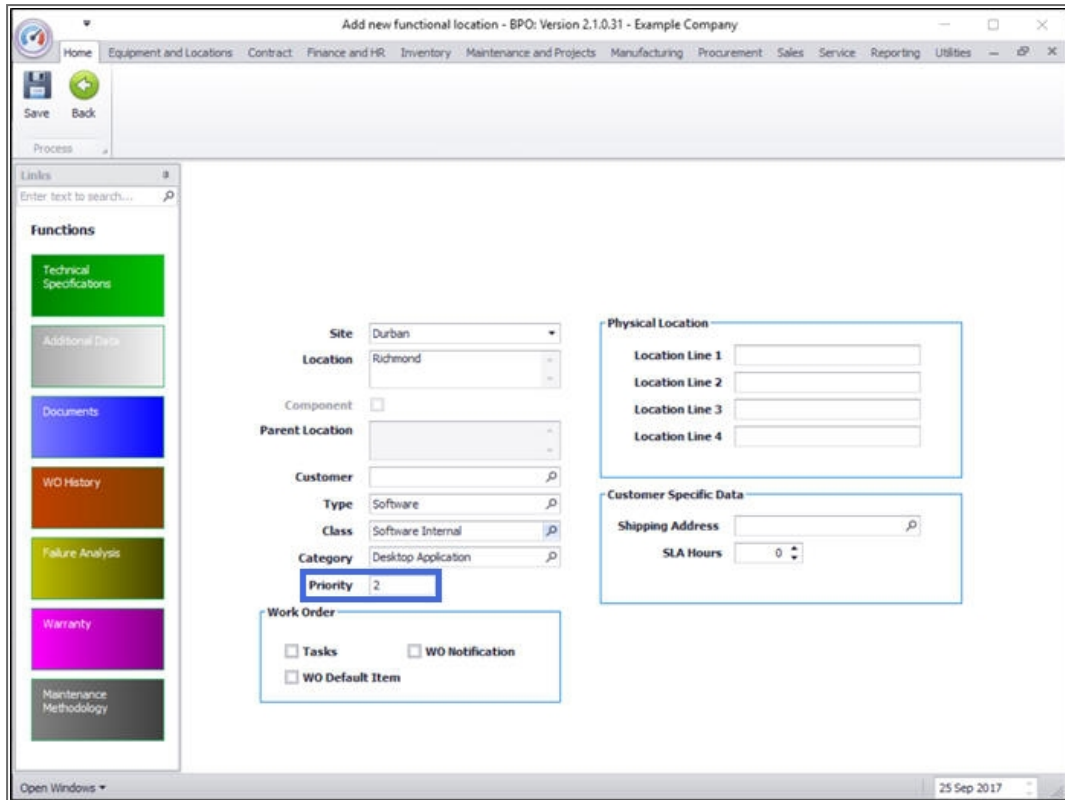
1. The **Select the category for this Location** screen will pop up.
2. Select the **row** of the Category you wish to assign to this Location.
3. Click on **Ok**.



1 → 2 → 3

SELECT PRIORITY

- Type in a **Priority** for this Location.
 - (1 = Most Important, 5 = Least Important)

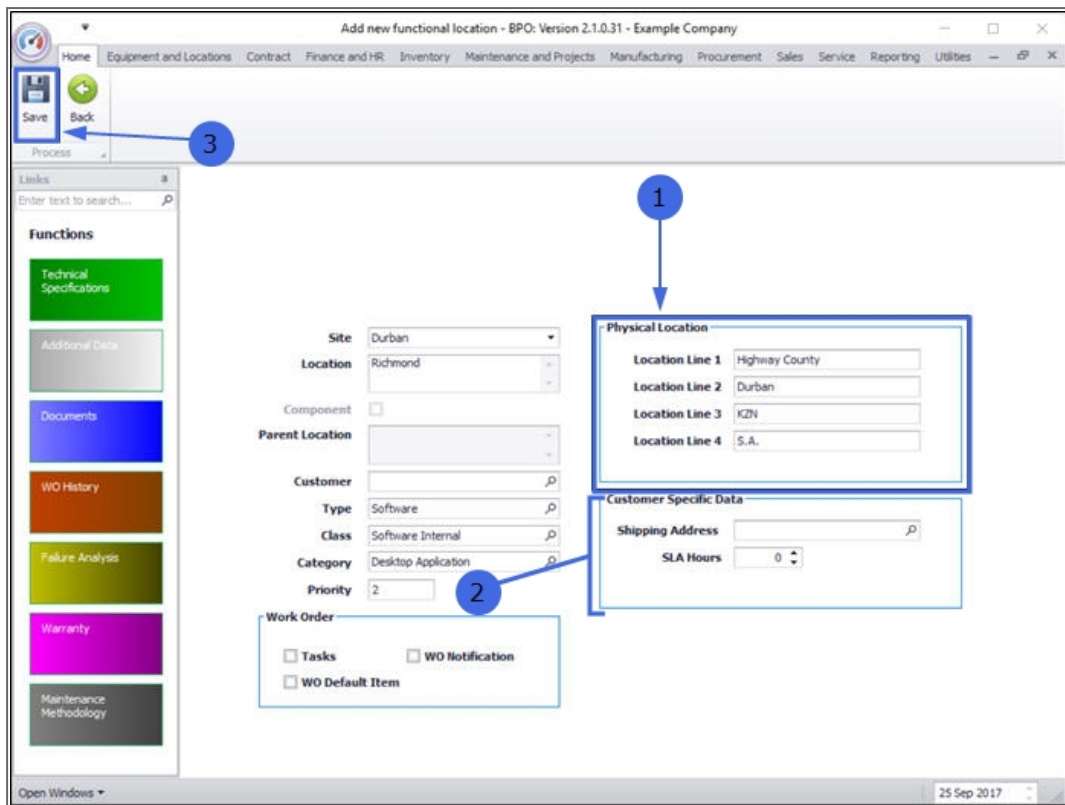


PHYSICAL LOCATION DETAILS

1. **Physical Location:** You can type in extra information here, if required.
2. As we are creating a **generic** location, not linked to a customer, the **Customer Specific Data** frame does not need input.

SAVE LOCATION

3. Click on **Save**.

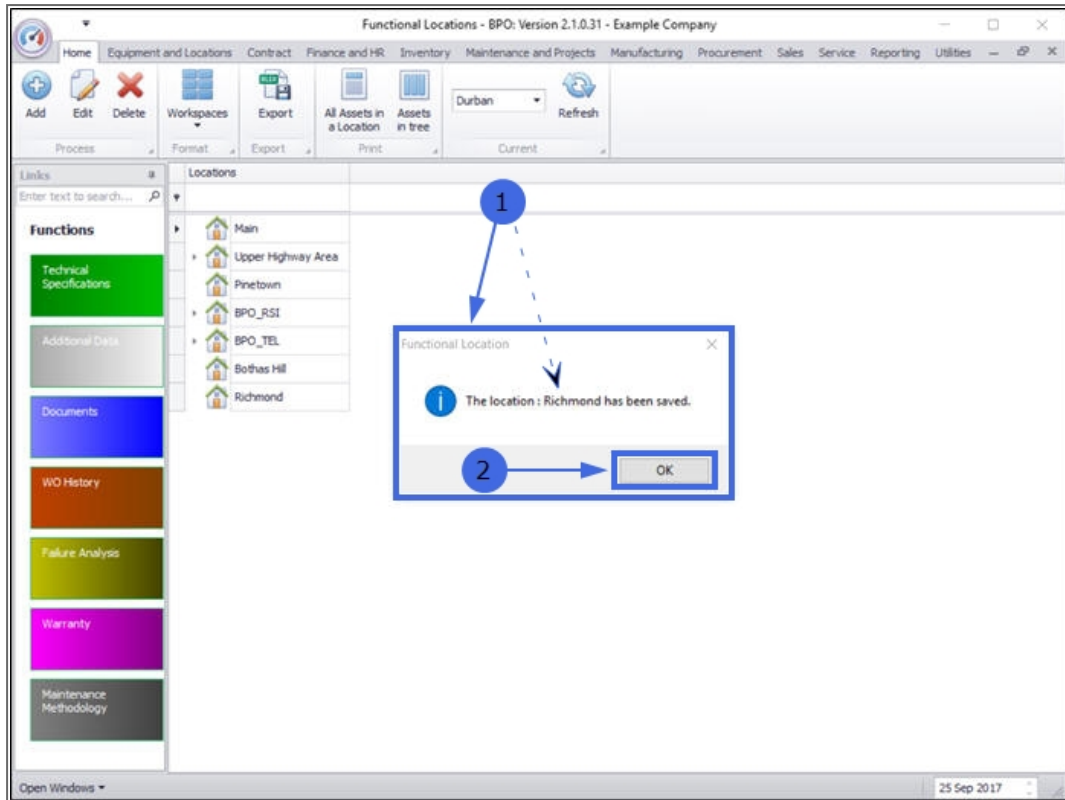


The screenshot shows a software window titled "Add new functional location - BPO: Version 2.1.0.31 - Example Company". The window has a menu bar with options: Home, Equipment and Locations, Contract, Finance and HR, Inventory, Maintenance and Projects, Manufacturing, Procurement, Sales, Service, Reporting, Utilities. Below the menu bar is a toolbar with "Save" and "Back" buttons. A sidebar on the left contains a "Functions" section with buttons for "Technical Specifications", "Additional Data", "Documents", "WO History", "Failure Analysis", "Warranty", and "Maintenance Methodology". The main area contains a form with the following fields and sections:

- Site:** Durban (dropdown)
- Location:** Richmond (dropdown)
- Component:** ☐
- Parent Location:** (dropdown)
- Customer:** (dropdown)
- Type:** Software (dropdown)
- Class:** Software Internal (dropdown)
- Category:** Desktop Application (dropdown)
- Priority:** 2 (text input)
- Physical Location:** (Section 1)
 - Location Line 1: Highway County (text input)
 - Location Line 2: Durban (text input)
 - Location Line 3: KZN (text input)
 - Location Line 4: S.A. (text input)
- Customer Specific Data:** (Section 2)
 - Shipping Address: (text input)
 - SLA Hours: 0 (spin box)
- Work Order:** (Section 3)
 - ☐ Tasks
 - ☐ WO Notification
 - ☐ WO Default Item

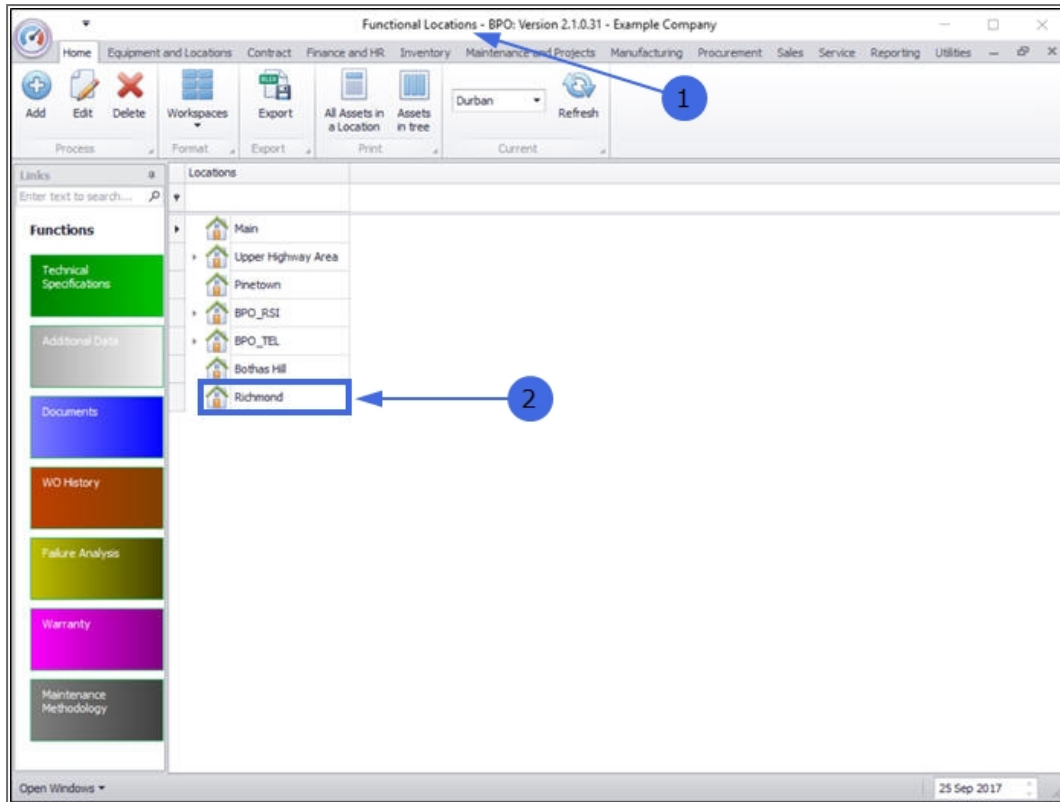
Numbered callouts: 1 points to the "Physical Location" section, 2 points to the "Work Order" section, and 3 points to the "Save" button in the toolbar.

1. A **Functional Location** message box will pop up advising the following:
 - *The location: [] has been saved.*
2. Click on **OK**.



VIEW NEW LOCATION

1. You will return to the **Functional Locations** listing screen.
2. The new location will appear in the Functional Location tree.



Related Topics

- [Introduction to Functional Locations](#)
- [Edit a Functional Location](#)
- [Delete a Functional Location](#)
- [Location - Technical Specifications](#)
- [Location - Additional Data](#)
- [Location - Documents](#)
- [Location - Work Order History](#)
- [Location - Failure Analysis](#)
- [Location - Warranty](#)
- [Location - Maintenance Methodology](#)
- [Location - Add a New Location Contract](#)

MNU.001.002