

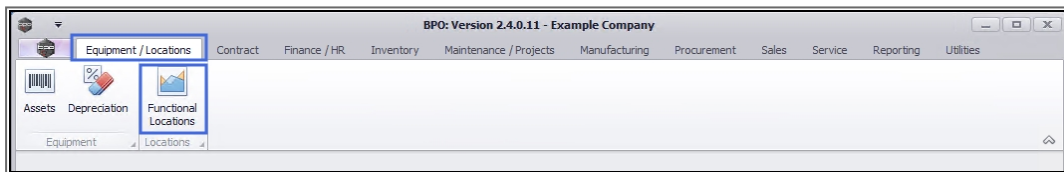
LOCATIONS

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.

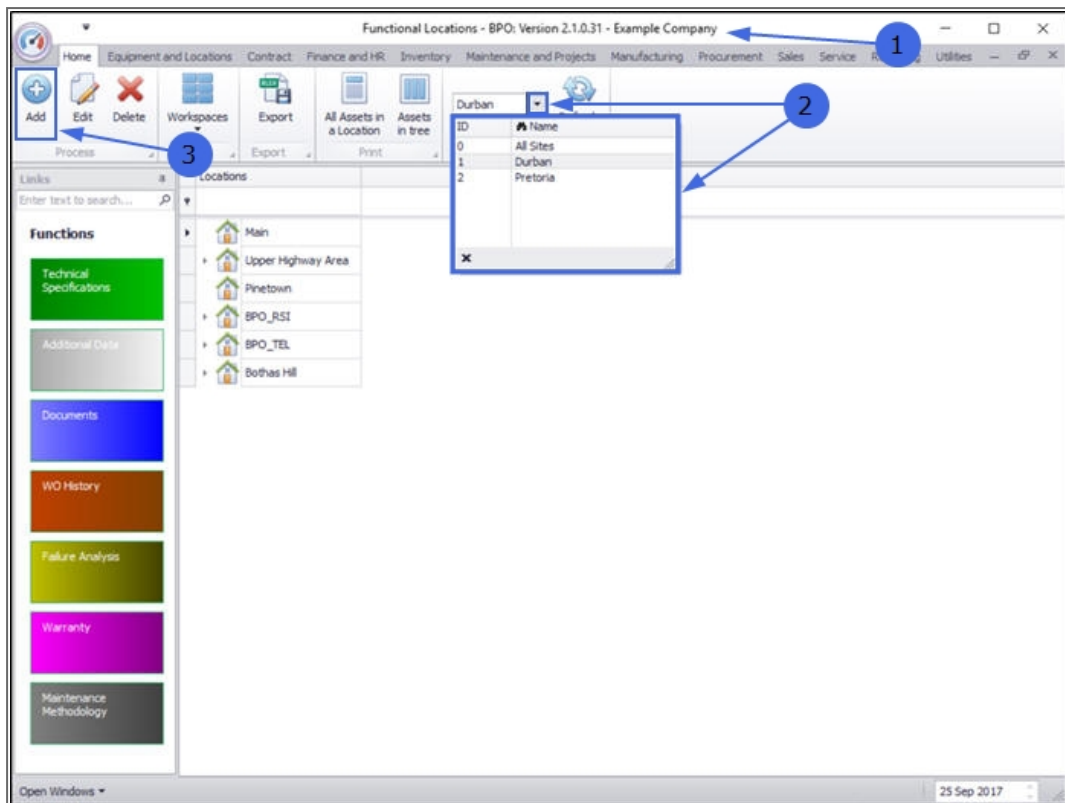
Ribbon Access: *Equipment / Locations > Functional Locations*



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

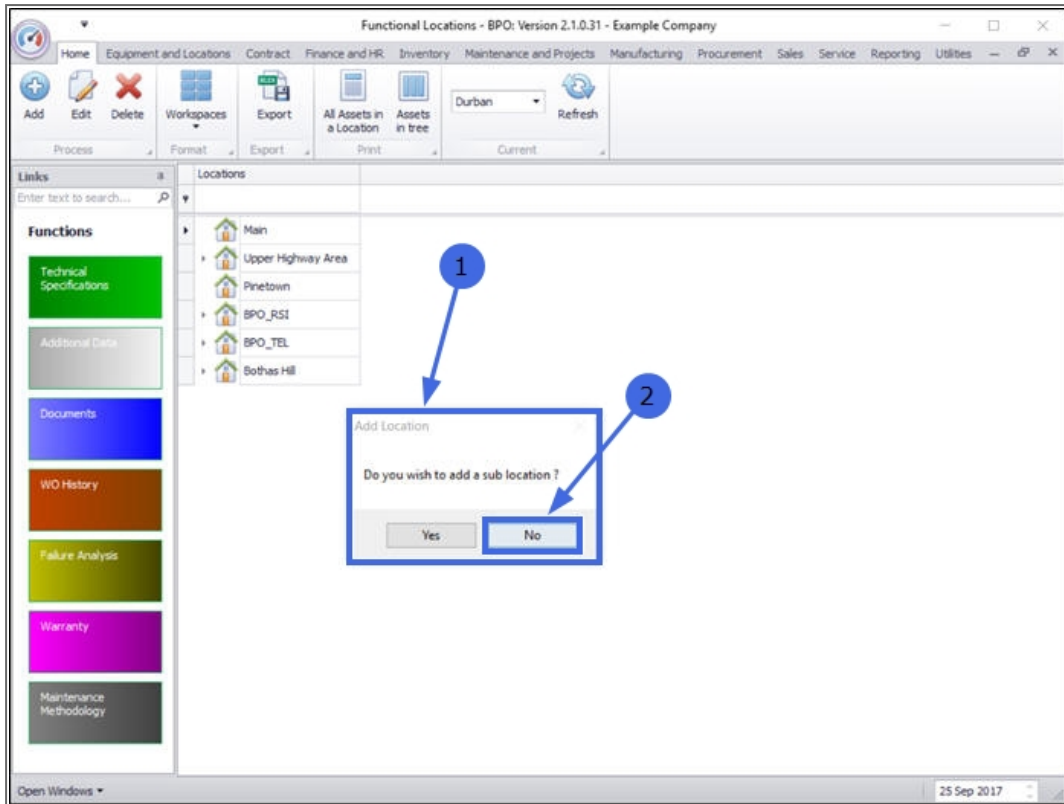
SELECT THE SITE

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.

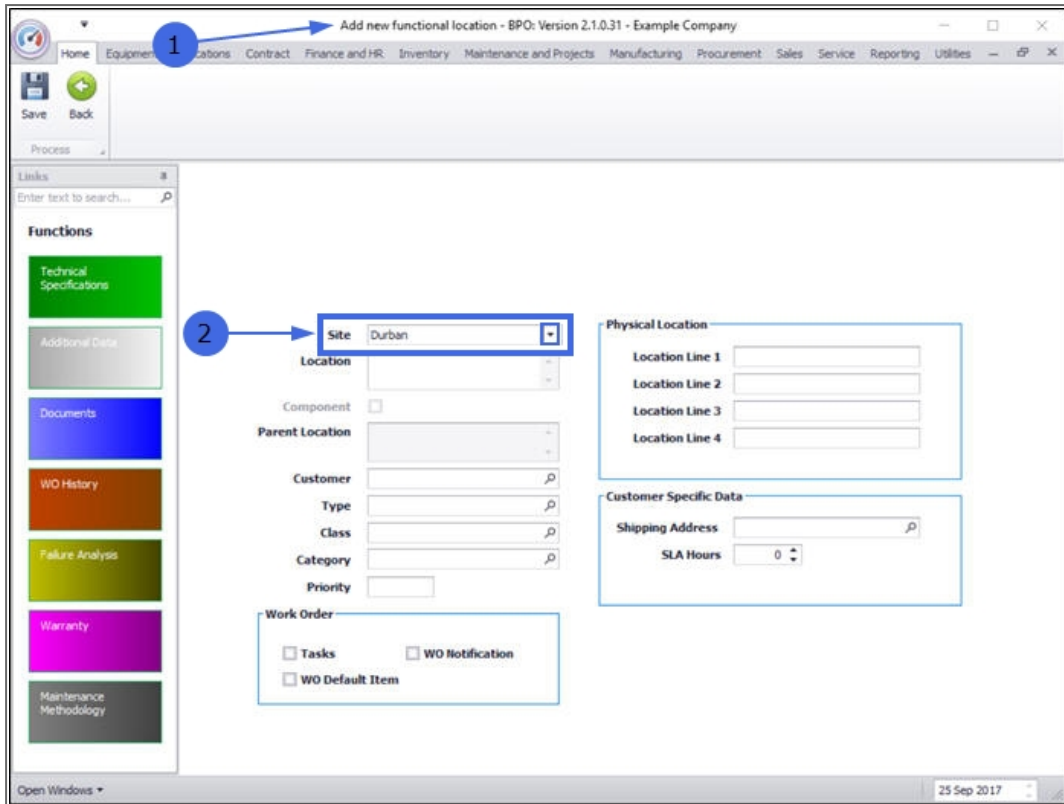


ADD NEW FUNCTIONAL LOCATION

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

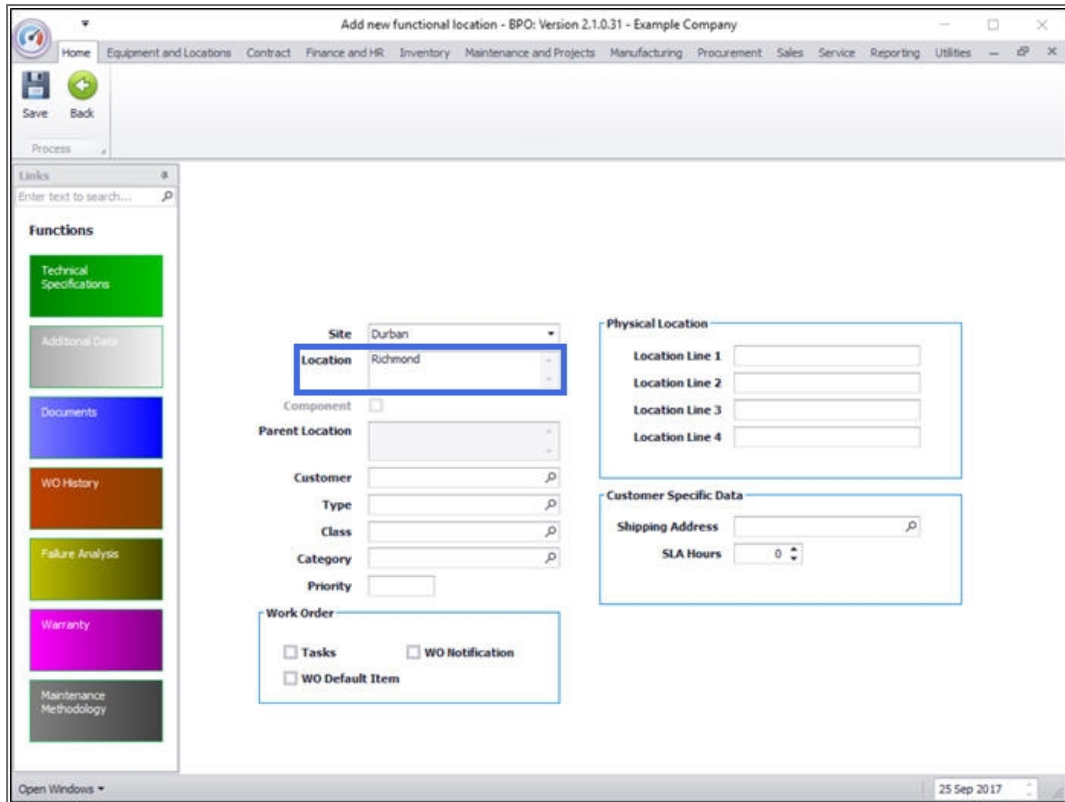
LINK SITE

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.



LINK LOCATION

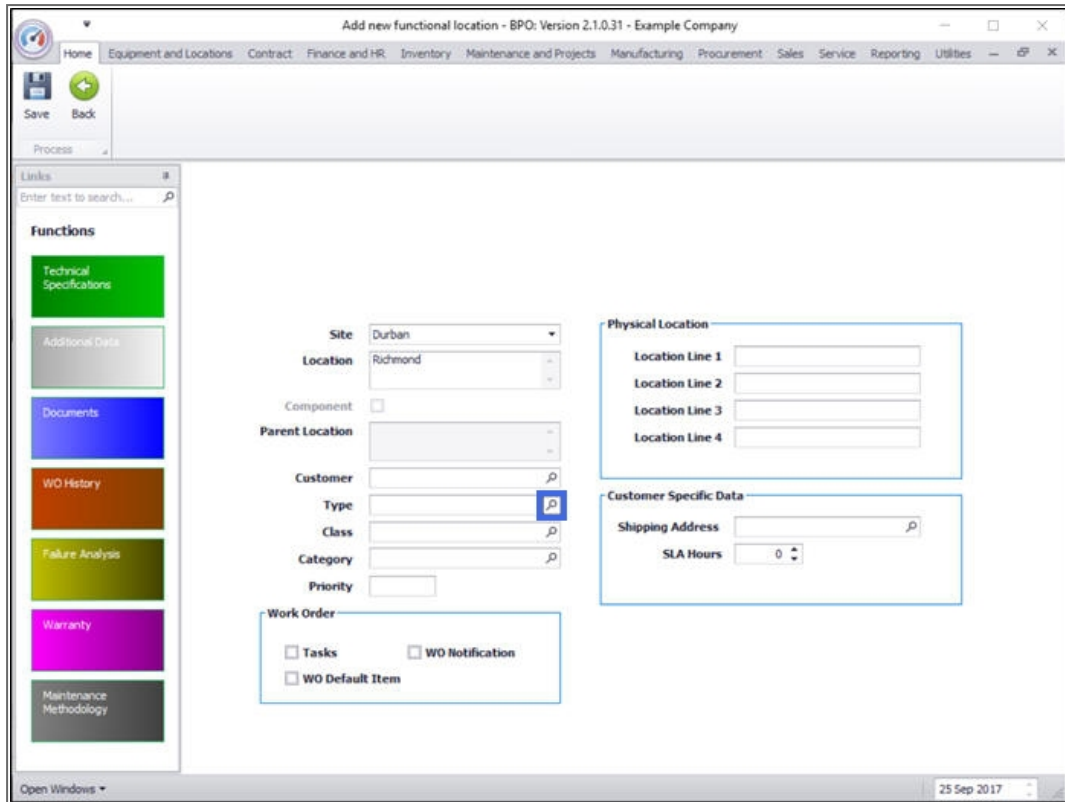
- In the **Location** field, type in the location description.



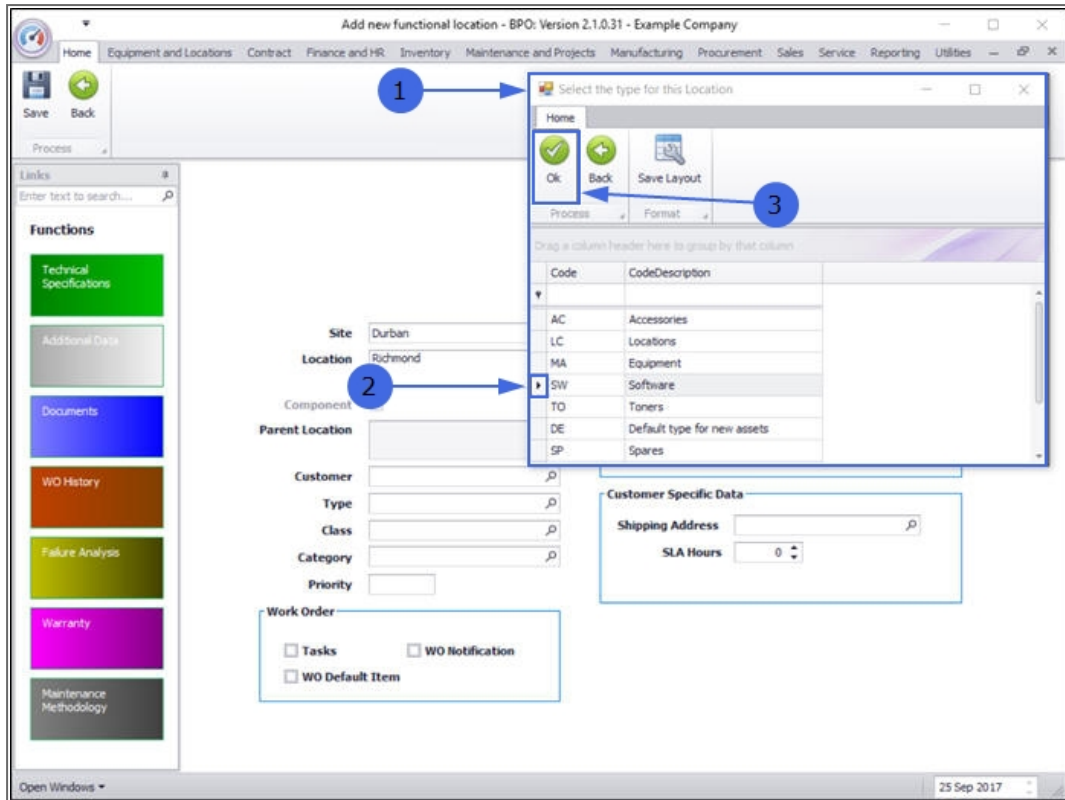
- Leave the **Customer** field blank as you are creating a generic location.

SELECT TYPE

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

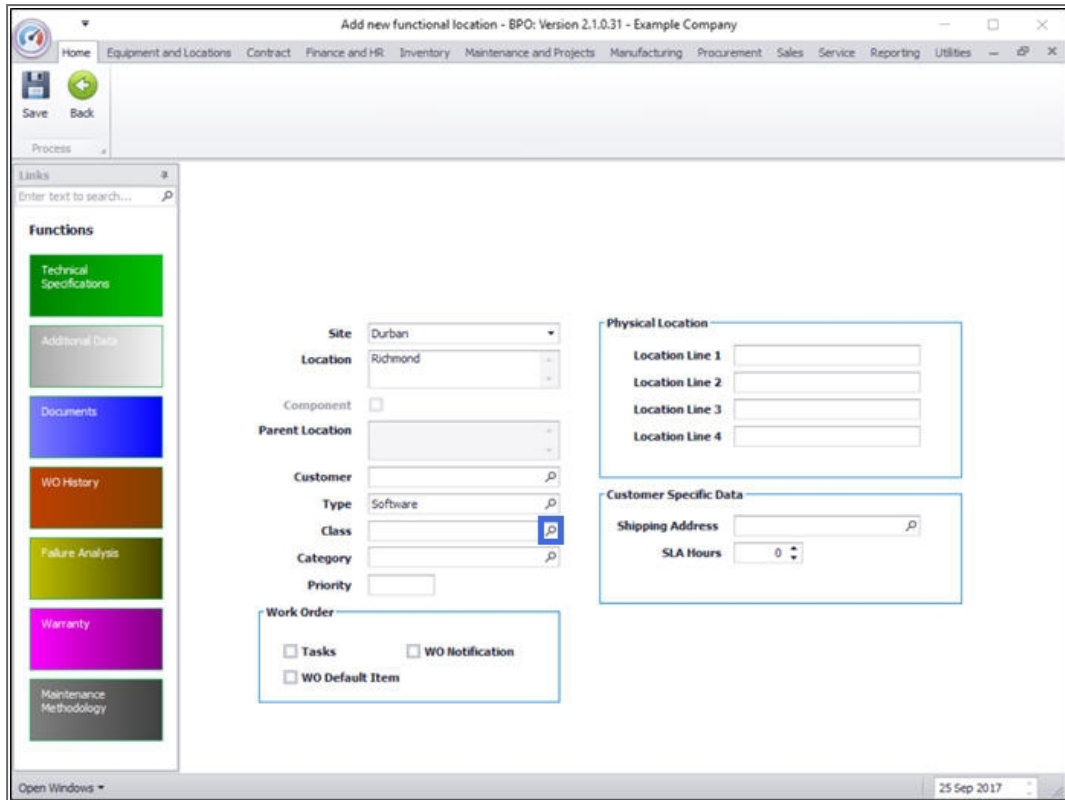


1. The **Select the type for this Location** screen will pop up.
2. Select the **row** of the type you wish to assign to this location.
3. Click on **Ok**.

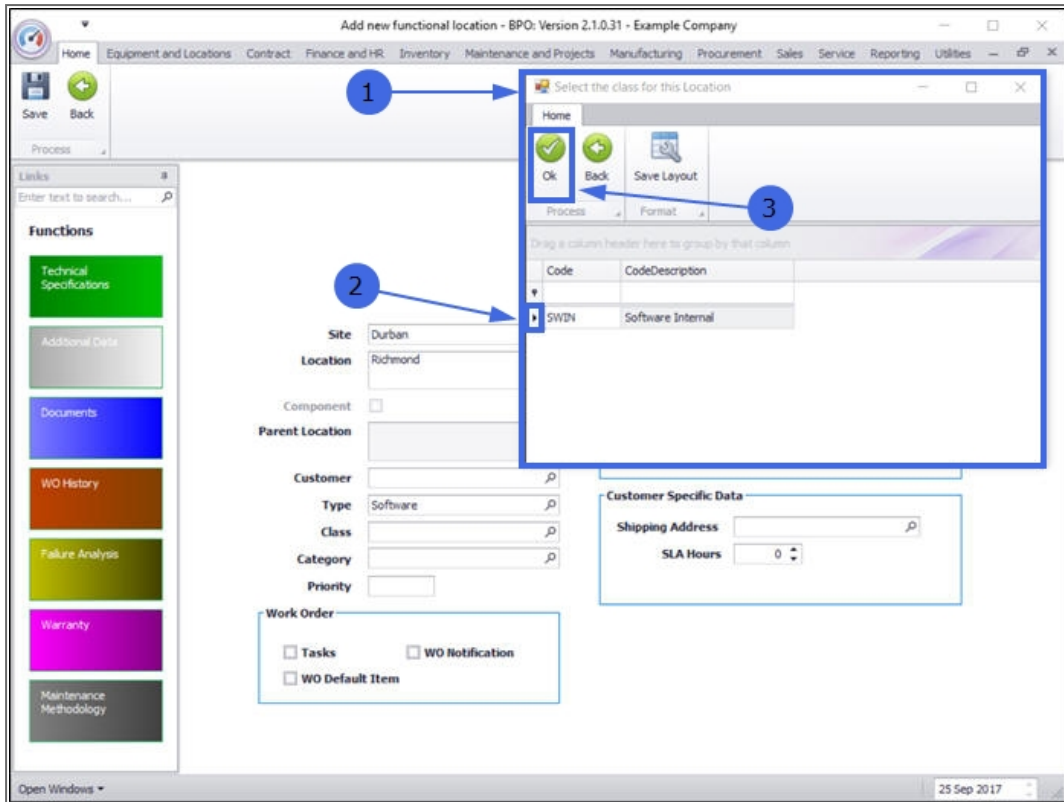


SELECT CLASS

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

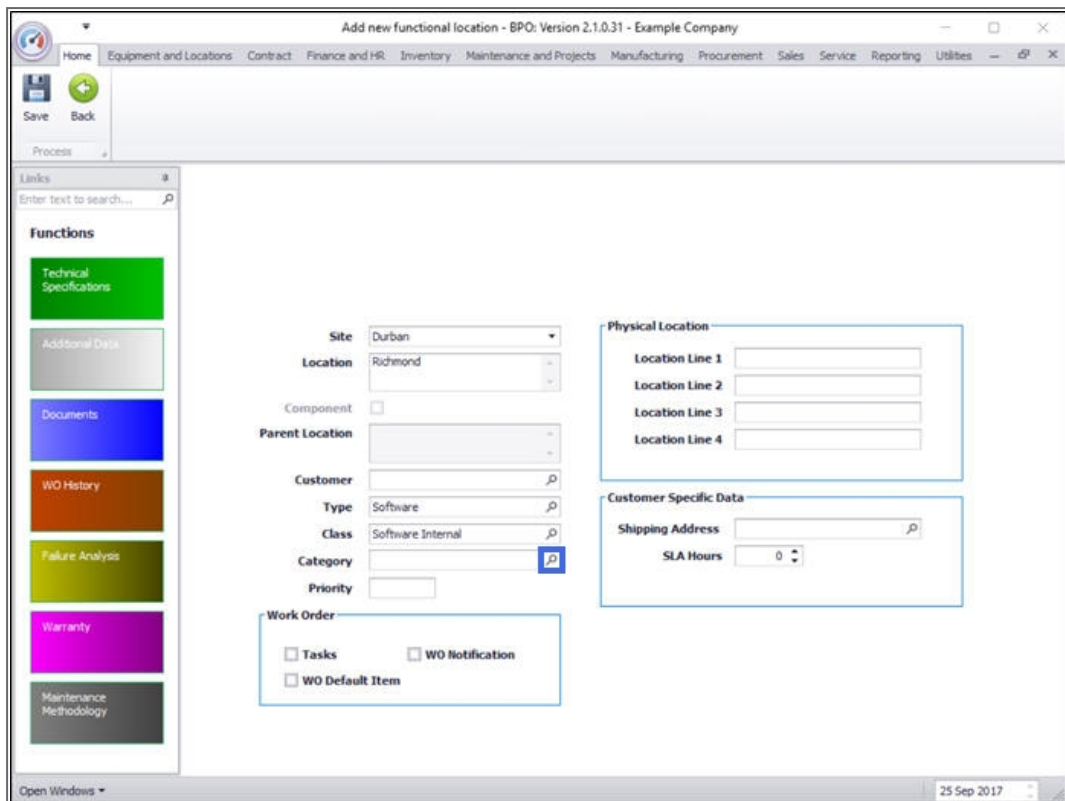


1. The **Select the class for this Location** screen will pop up.
2. Select the **row** of the class you wish to assign to this Location.
3. Click on **Ok**.

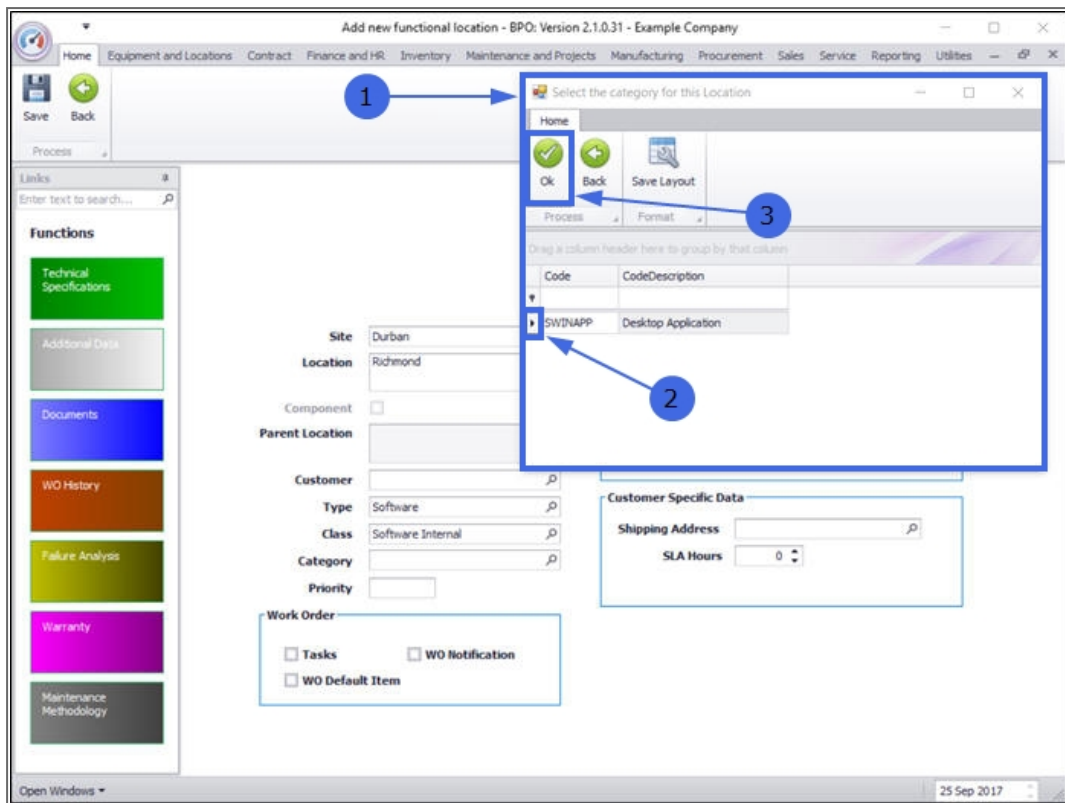


SELECT CATEGORY

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

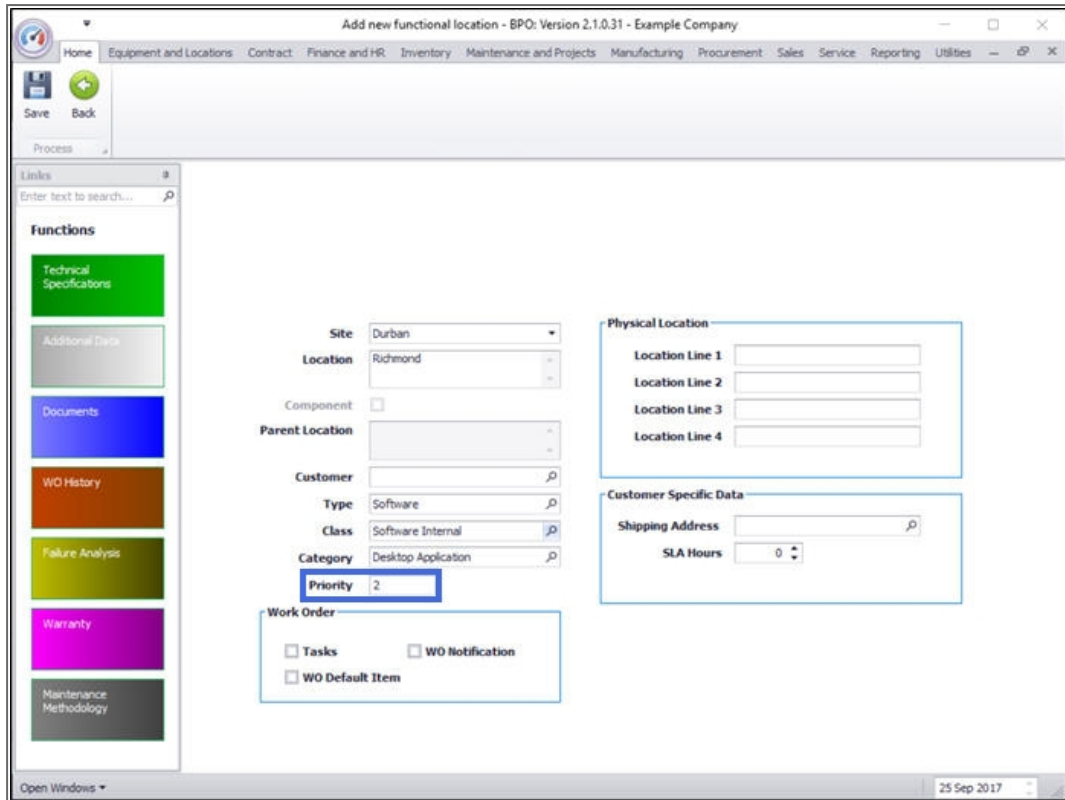


1. The **Select the category for this Location** screen will pop up.
2. Select the **row** of the Category you wish to assign to this Location.
3. Click on **Ok**.



SELECT PRIORITY

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

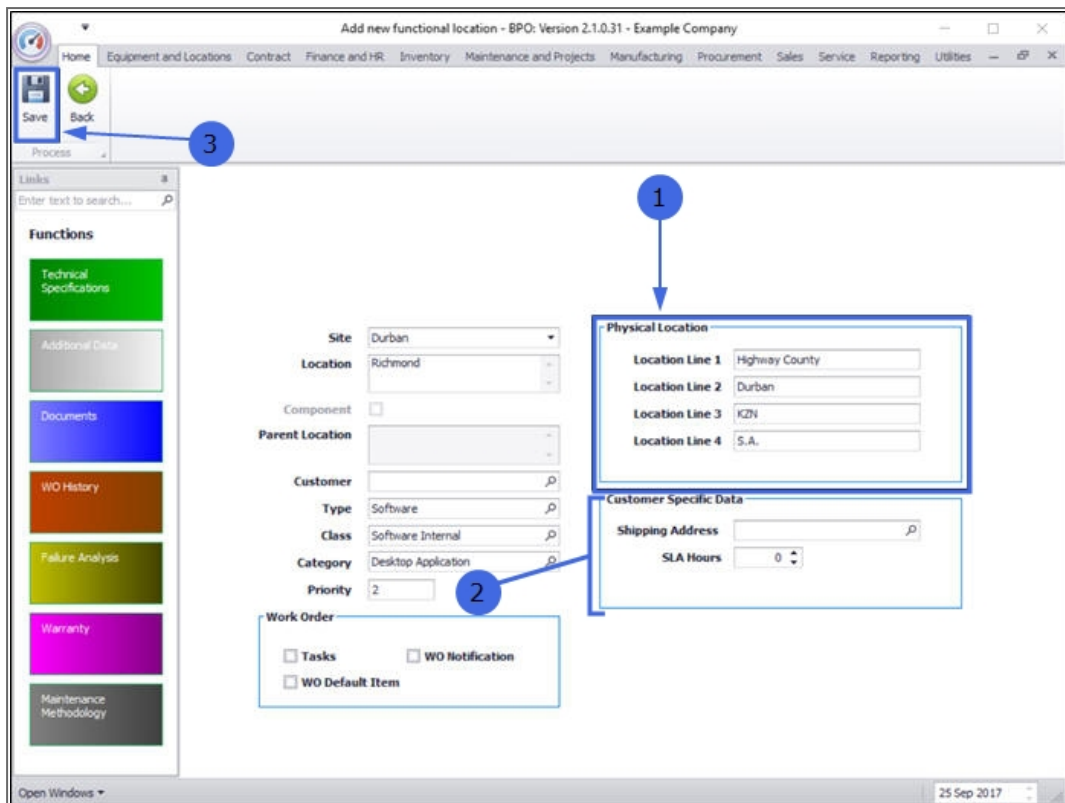


PHYSICAL LOCATION DETAILS

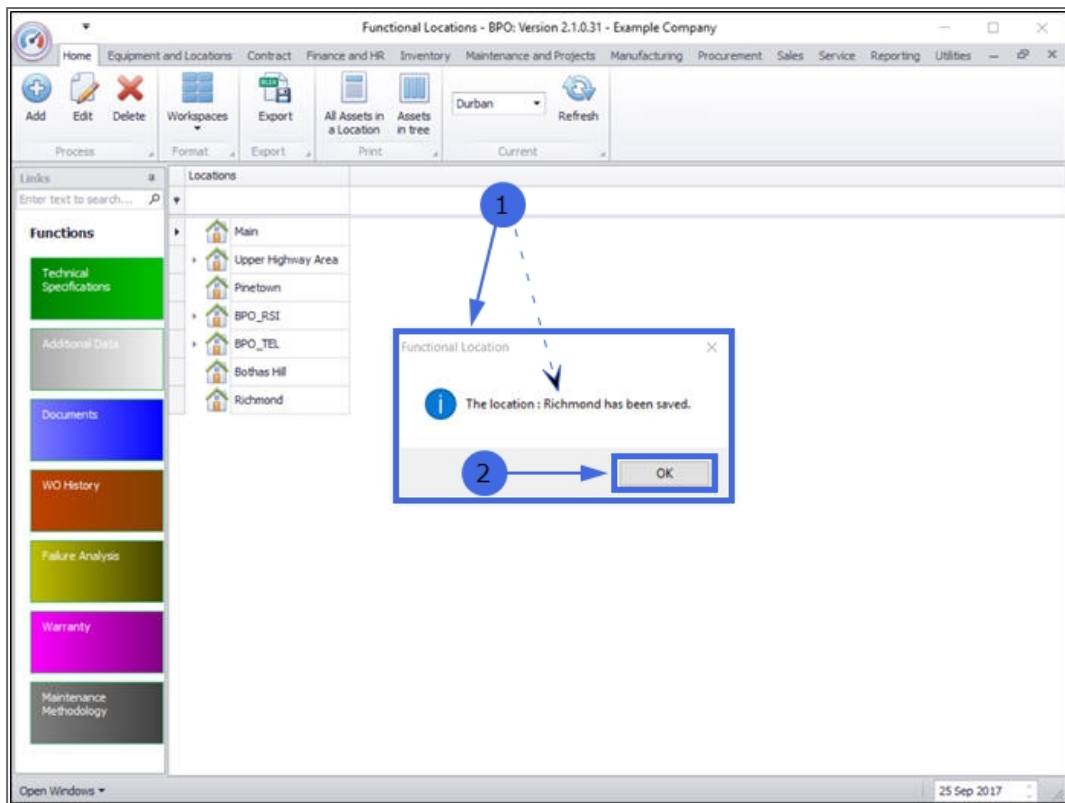
1. **Physical Location:** You can type in extra information here, if required.
2. As we are creating a **generic** location, not linked to a customer, the **Customer Specific Data** frame does not need input.

SAVE LOCATION

3. Click on **Save**.

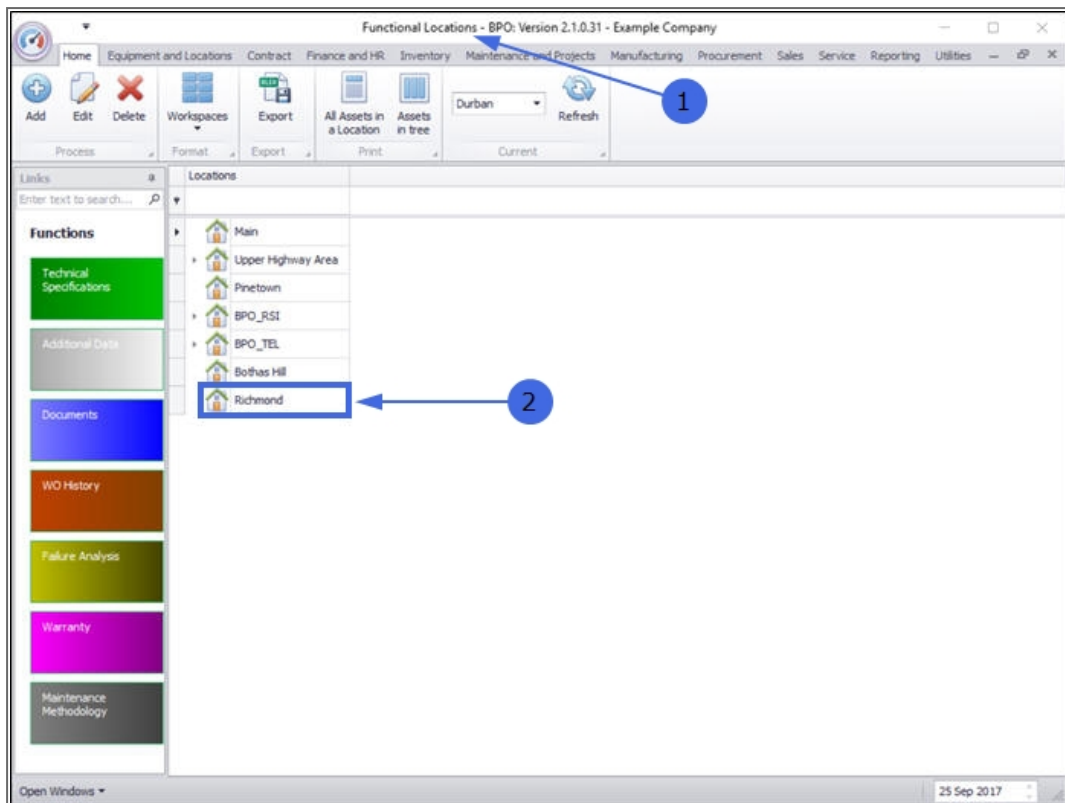


1. A **Functional Location** message box will pop up advising the following:
 - *The location: [] has been saved.*
2. Click on **OK**.



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](#)

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