We are currently updating our site; thank you for your patience.
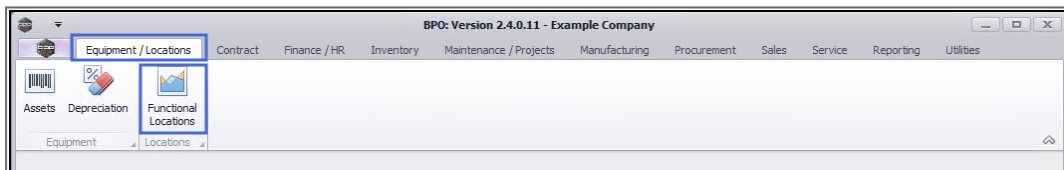
LOCATIONS

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
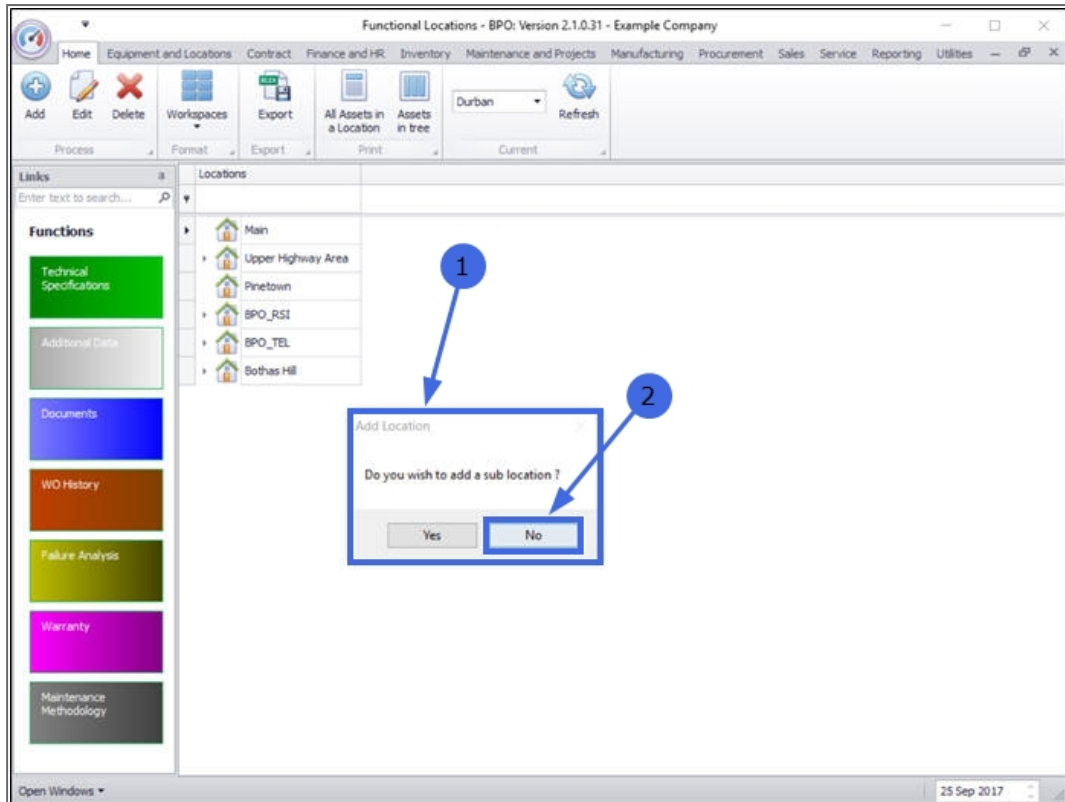

1. The Functional Locations screen will be displayed.

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.
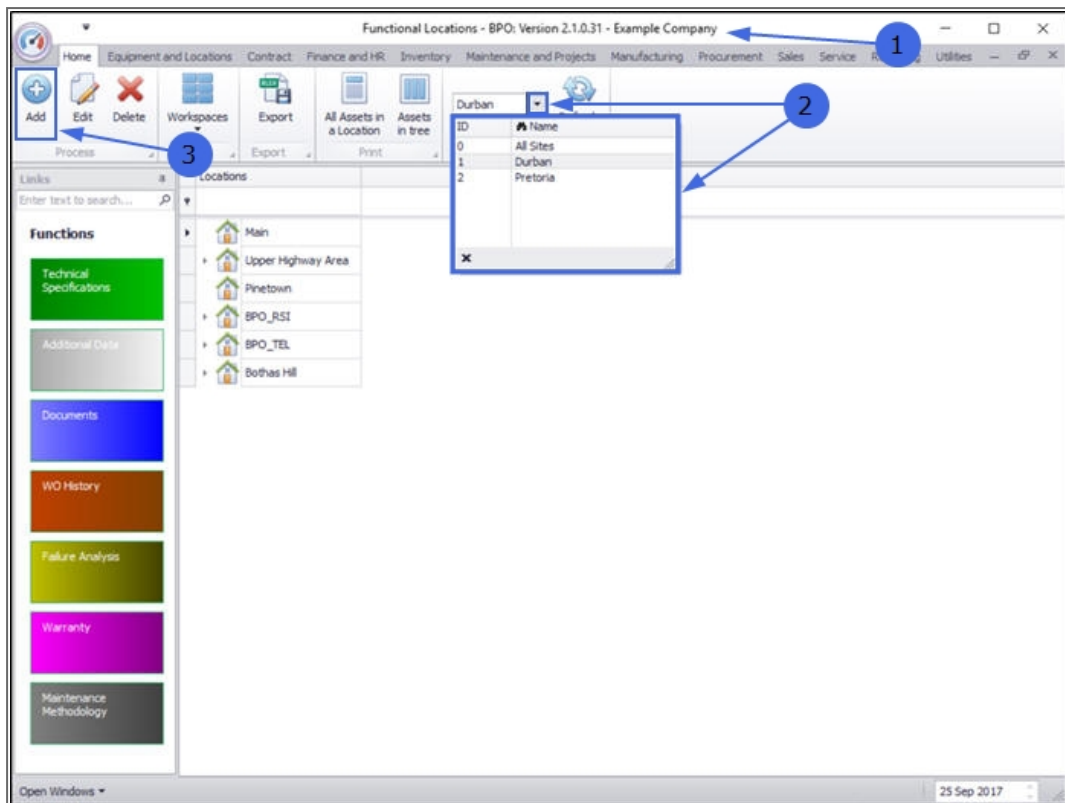
SELECT LOCATION TYPE

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.
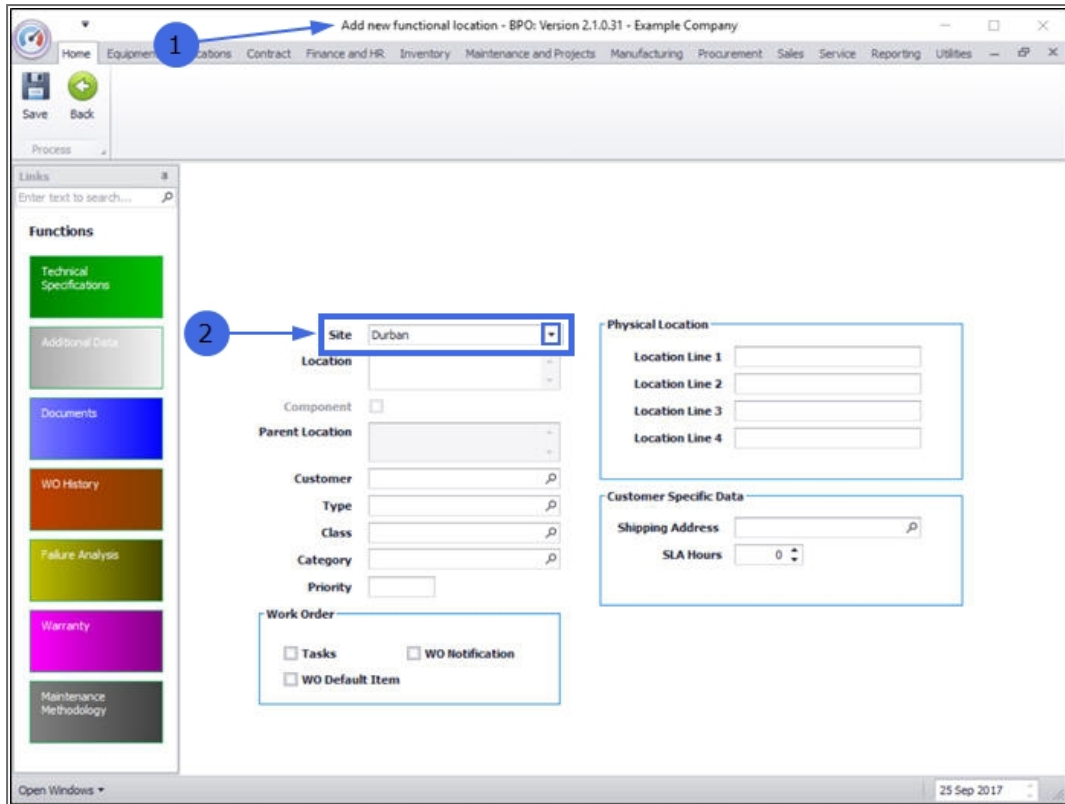
ADD NEW FUNCTIONAL LOCATION

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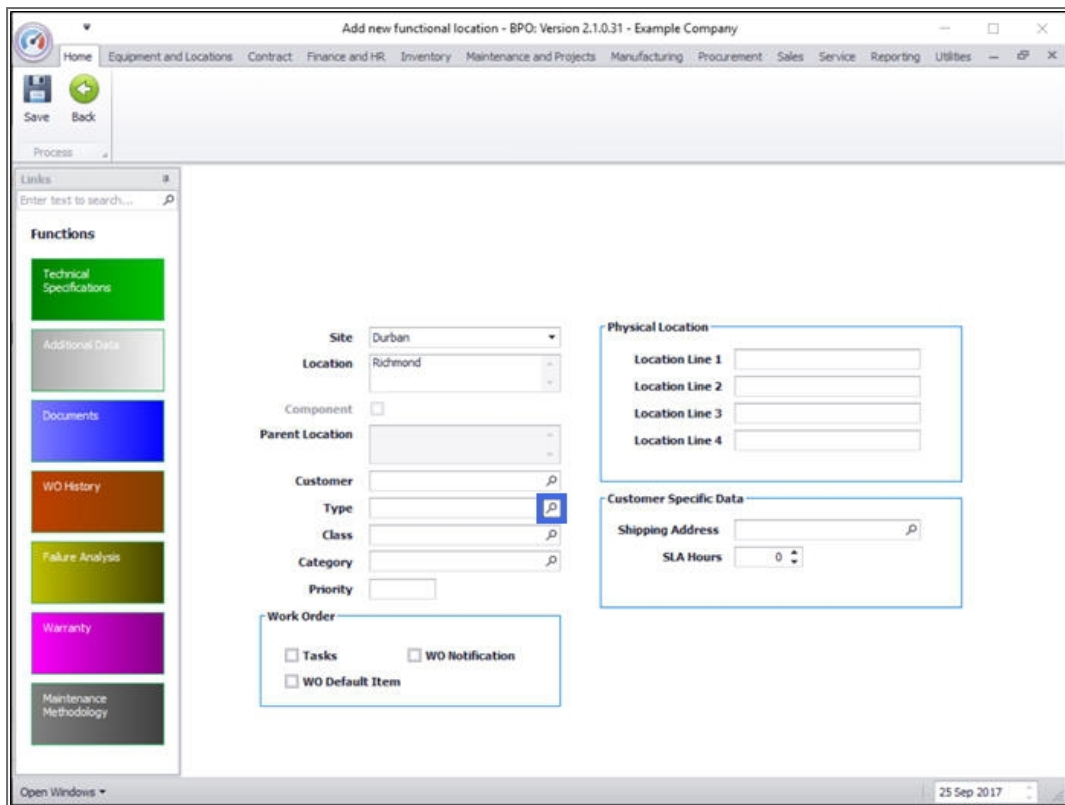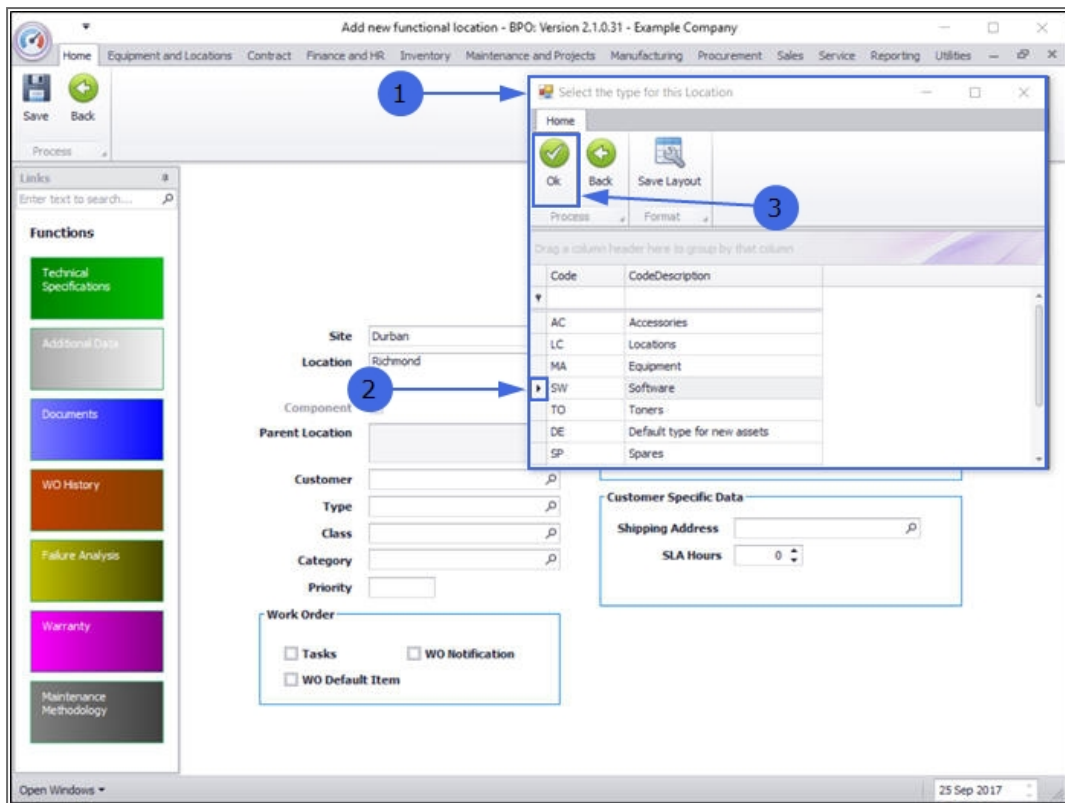
- Leave the **Customer** field blank as you are creating a generic location.

SELECT TYPE

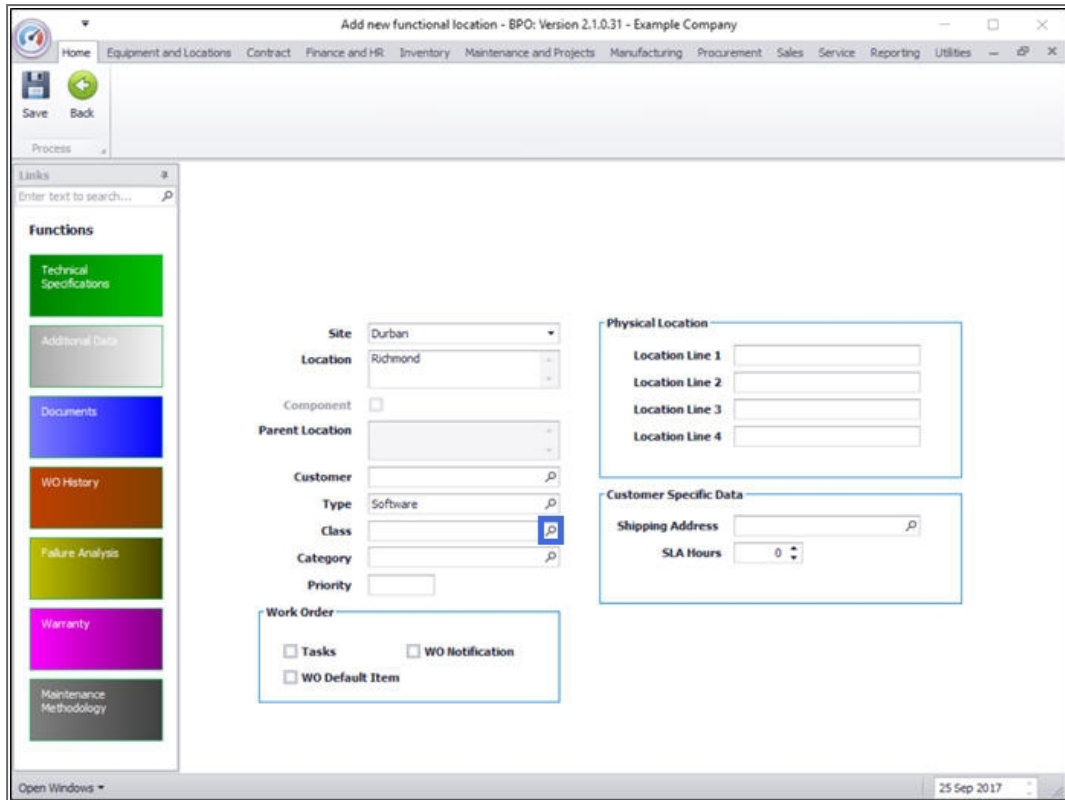- Click on the search button in the **Type** field.

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.
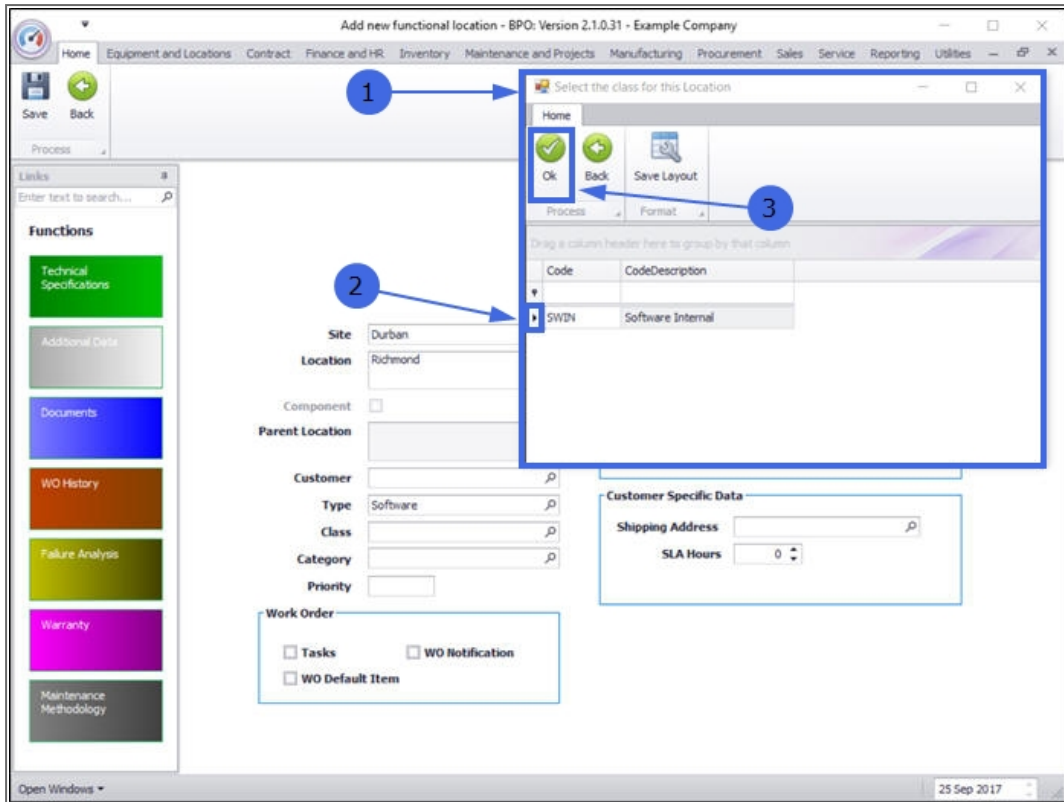3. Click on **Ok**.

SELECT CLASS

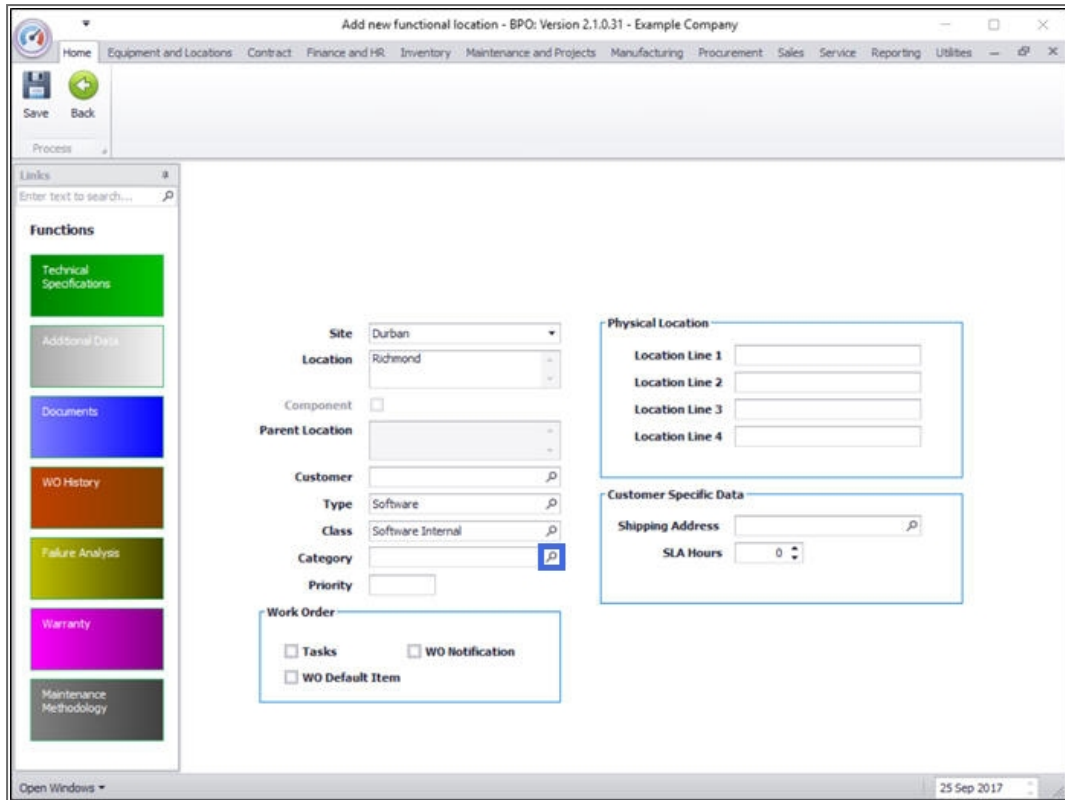- Click on the search button in the **Class** field.

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.
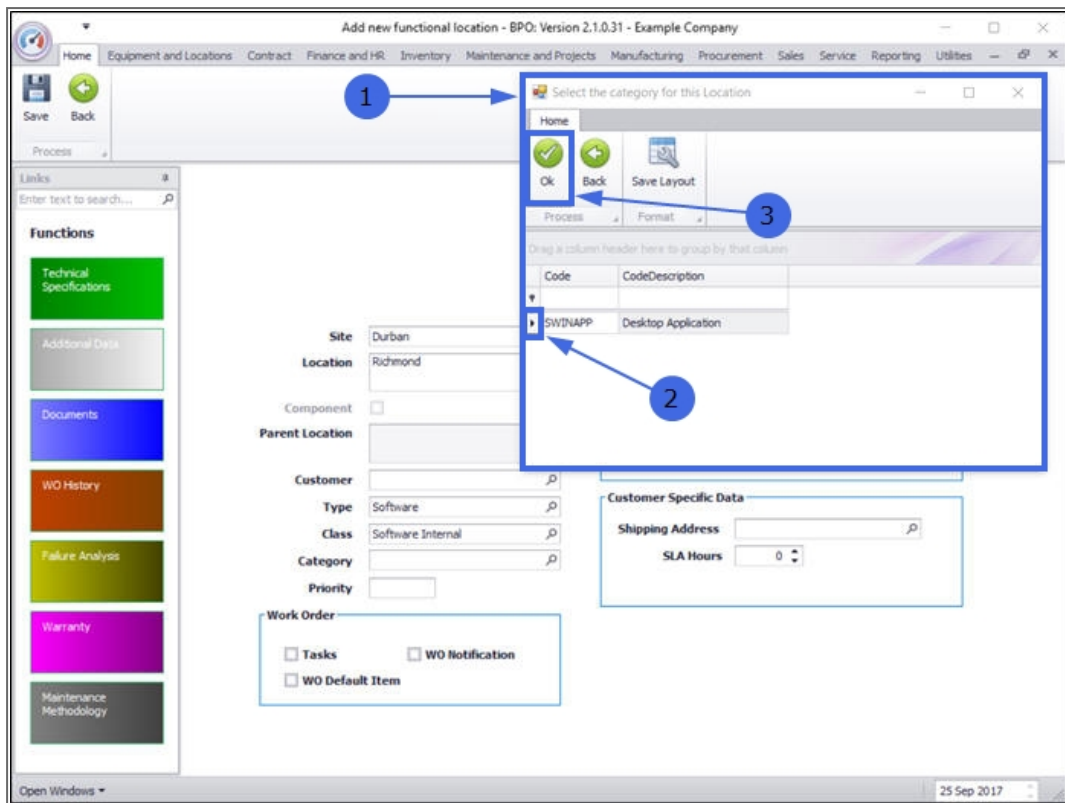3. Click on **Ok**.

SELECT CATEGORY

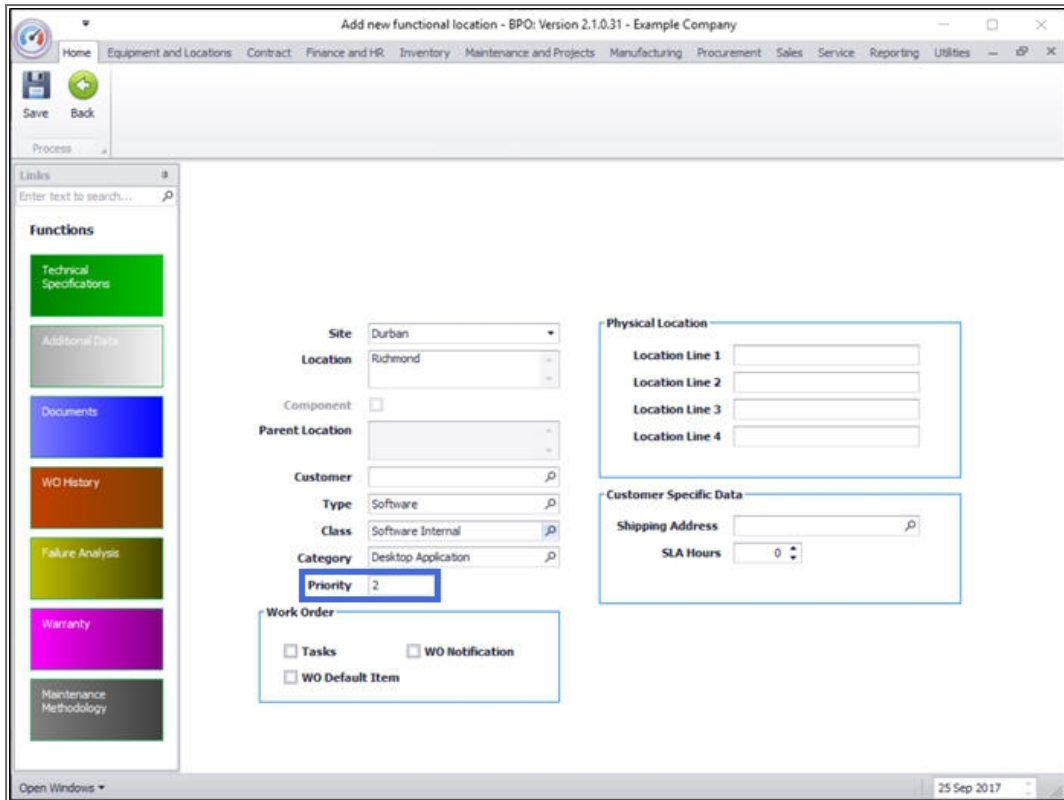- Click on the search button in the **Category** field.

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.
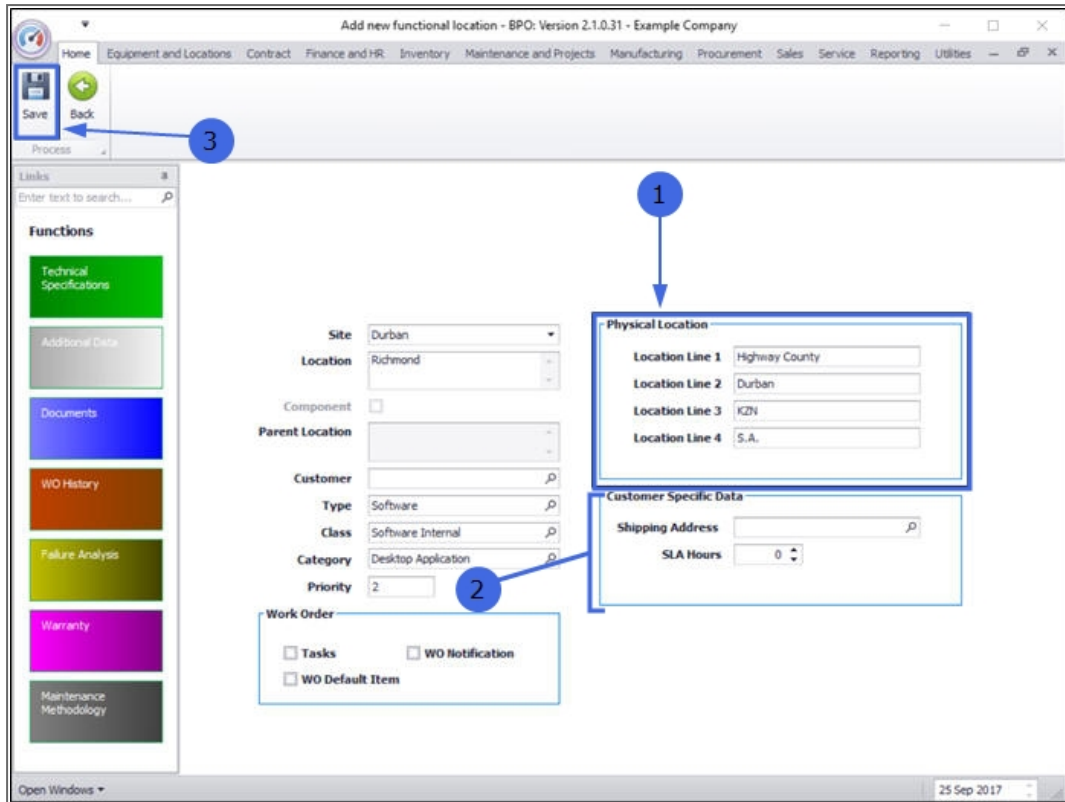 - (**1** = Most Important, **5** = Least Important)
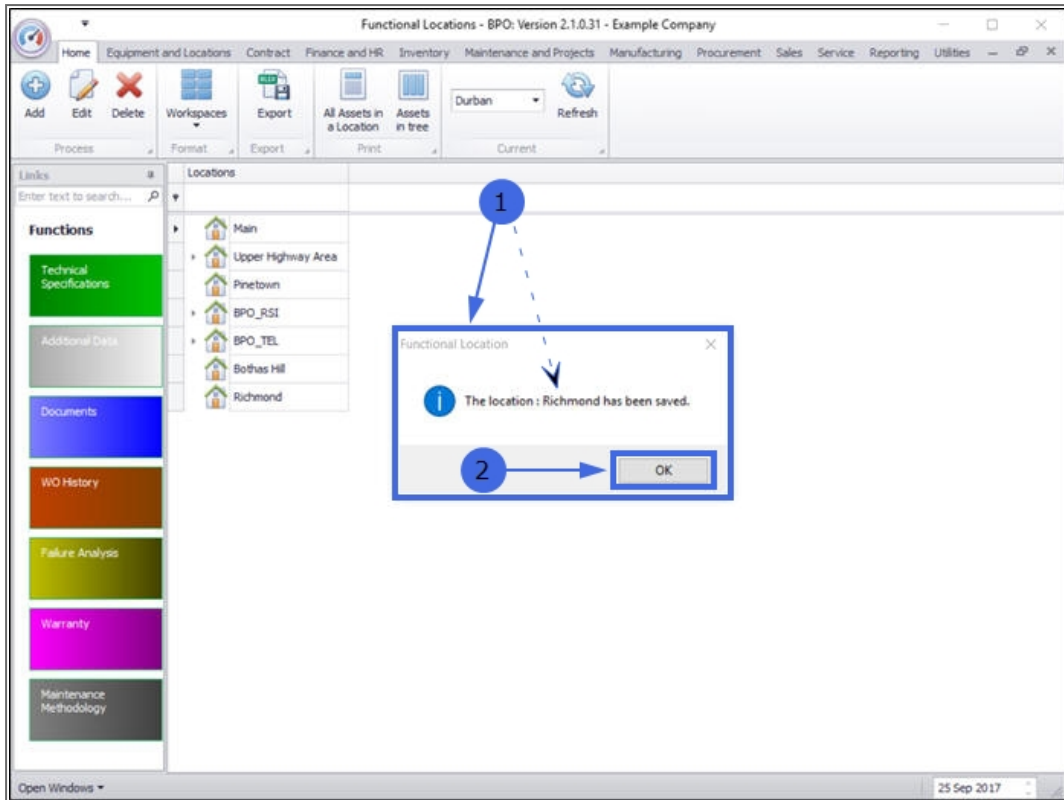
PHYSICAL LOCATION DETAILS

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.
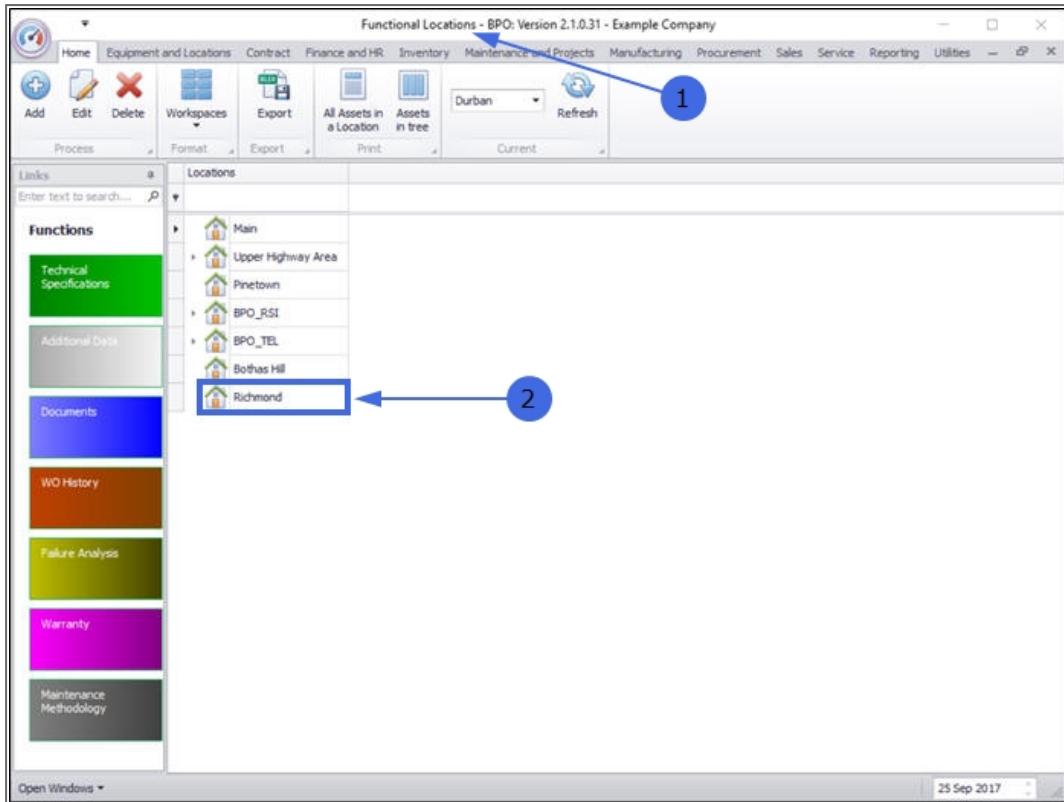
SAVE LOCATION

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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