

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

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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.

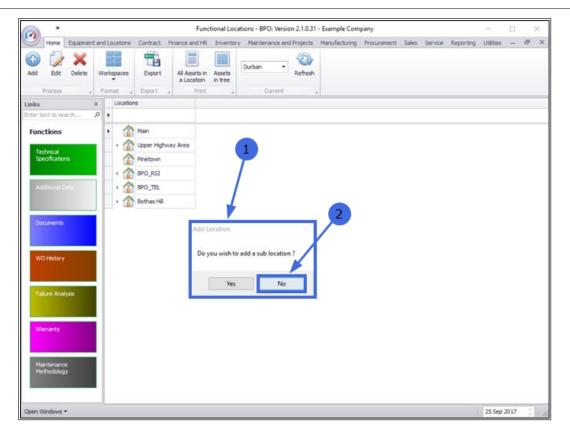


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SELECT LOCATION TYPE

- 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

 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.



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LINK LOCATION

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



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



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



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- 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.



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SELECT CLASS

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



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- 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.



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SELECT CATEGORY

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



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- 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.



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SELECT PRIORITY

• Type in a **Priority** for this Location.

• (1 = Most Important, 5 = Least Important)



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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

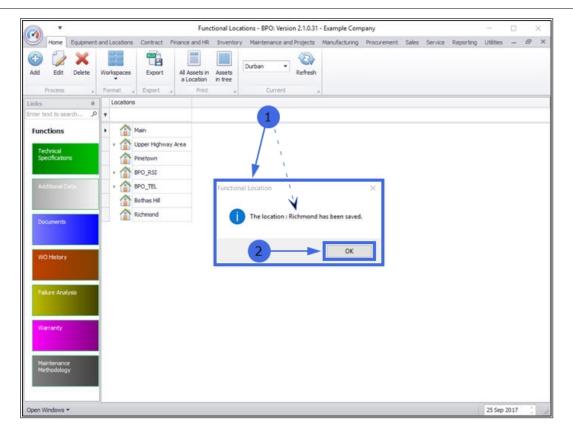
3. Click on Save.



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- 1. A Functional Location message box will pop up advising the following:
 - $^{\circ}~$ The location: [] has been saved.
- 2. Click on OK.

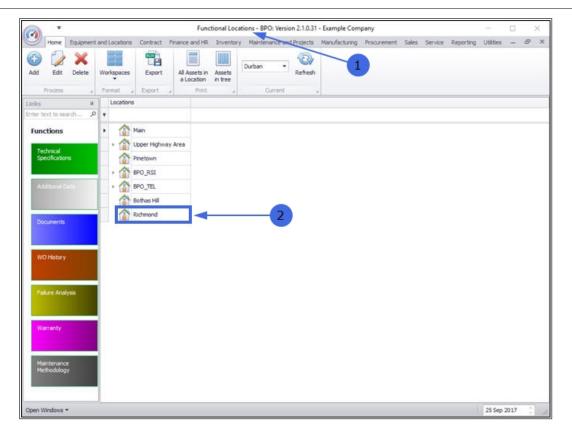




VIEW NEW LOCATION

- 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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