

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.

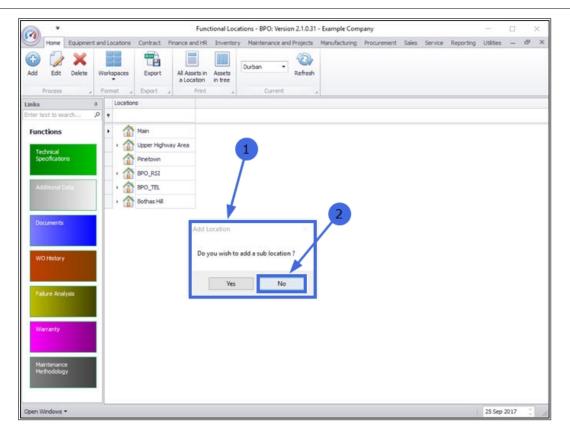


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## **SELECT LOCATION TYPE**

- 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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#### **SELECT TYPE**

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



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- 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**

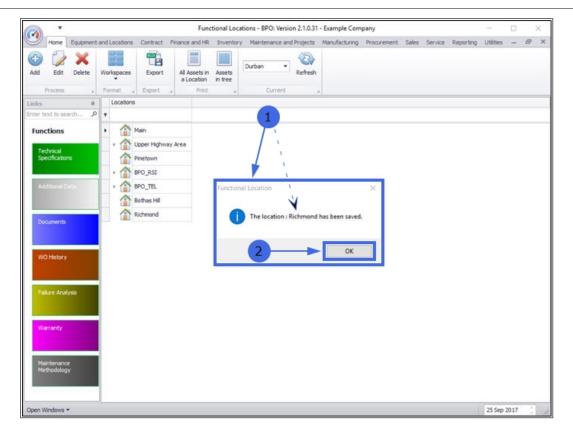
3. Click on Save.



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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.

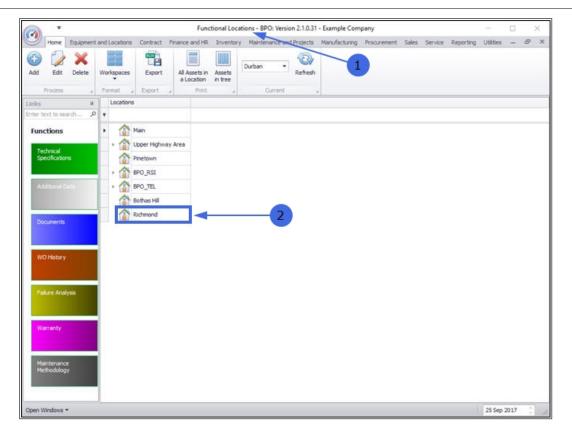




### **VIEW NEW LOCATION**

- 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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