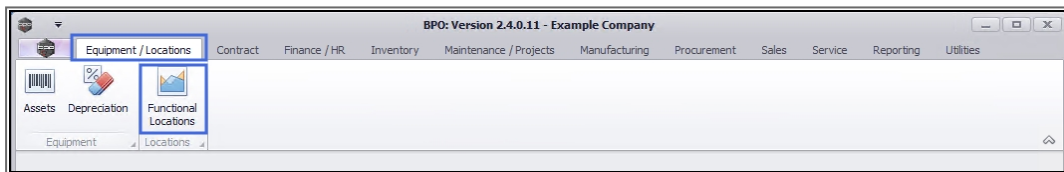# LOCATIONS

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*

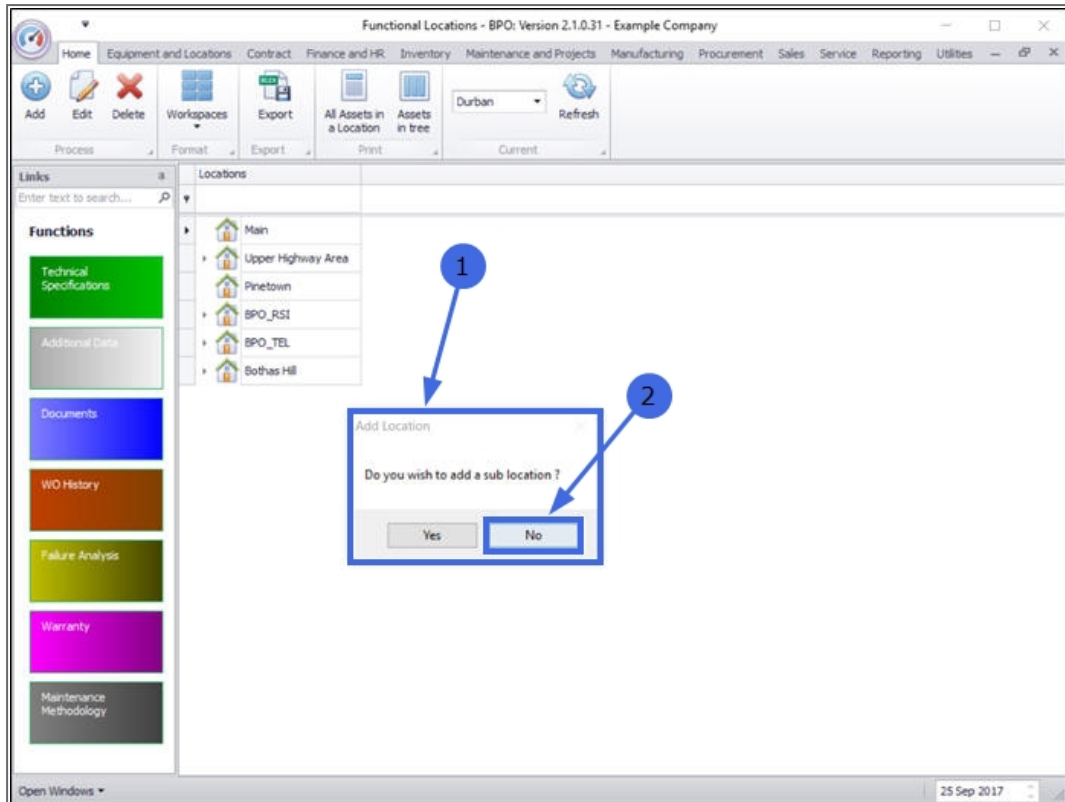1. The **Functional Locations** screen will be displayed.

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**.
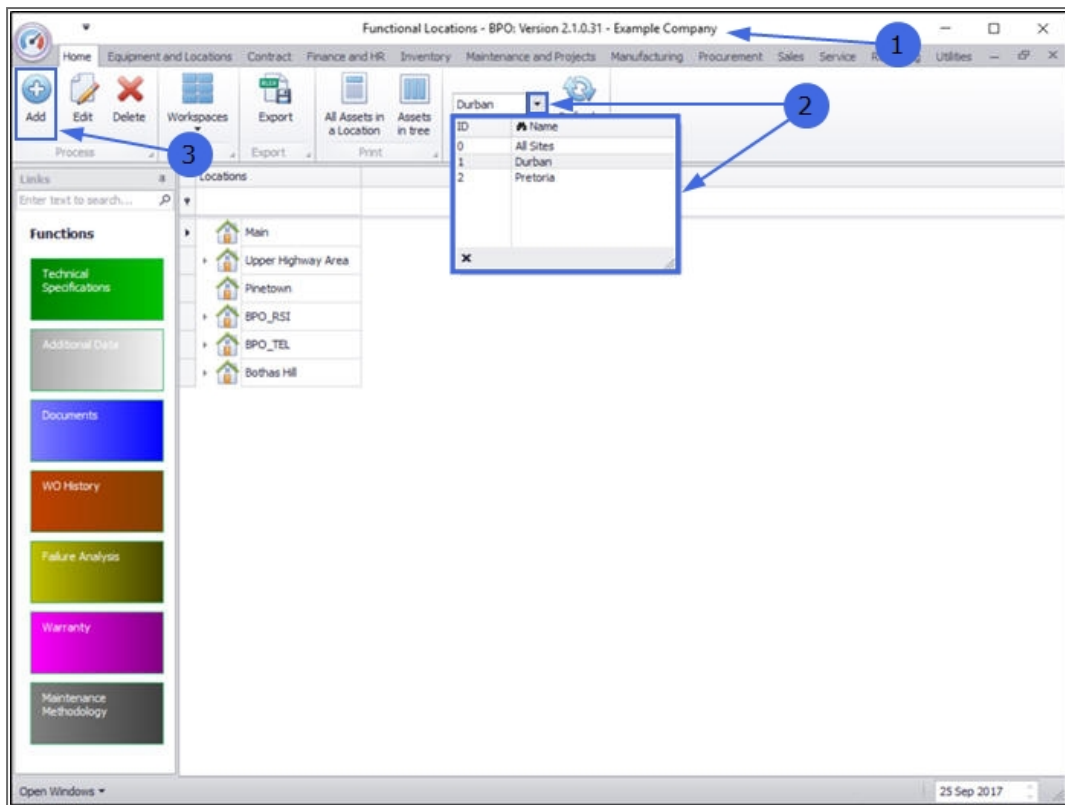
SELECT LOCATION TYPE

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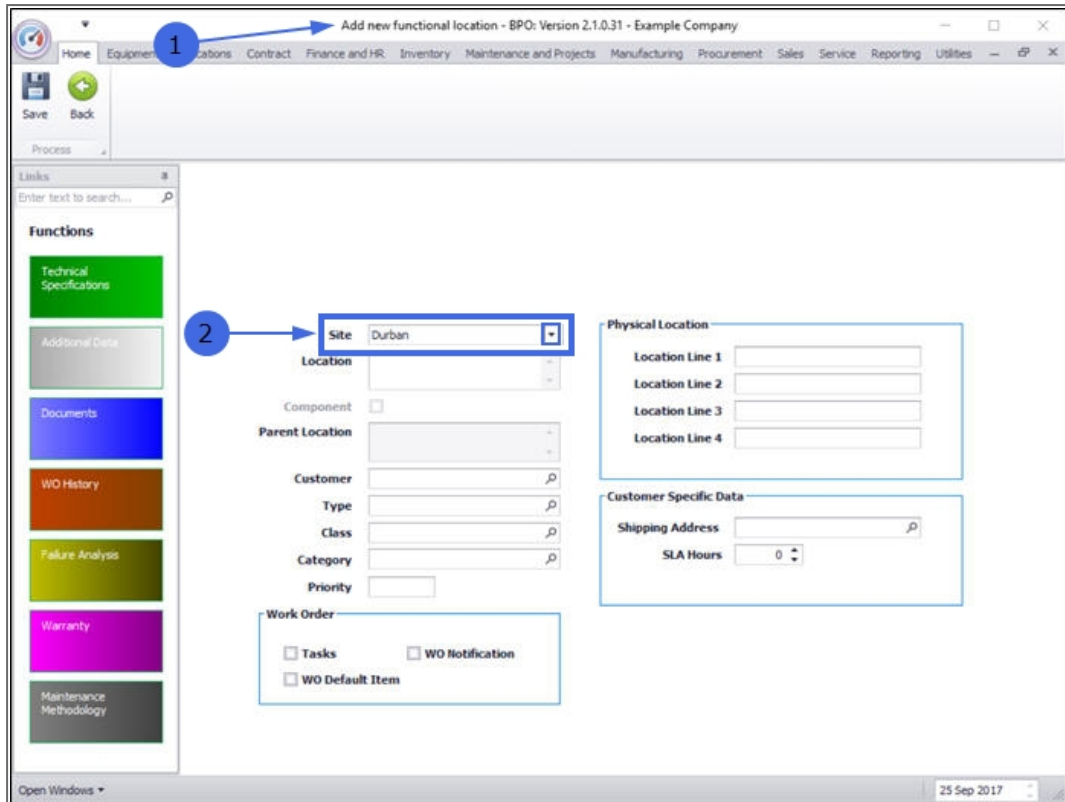2. Click on *No*, as in this example, we wish to set up a *main* location not a sub-location.

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.
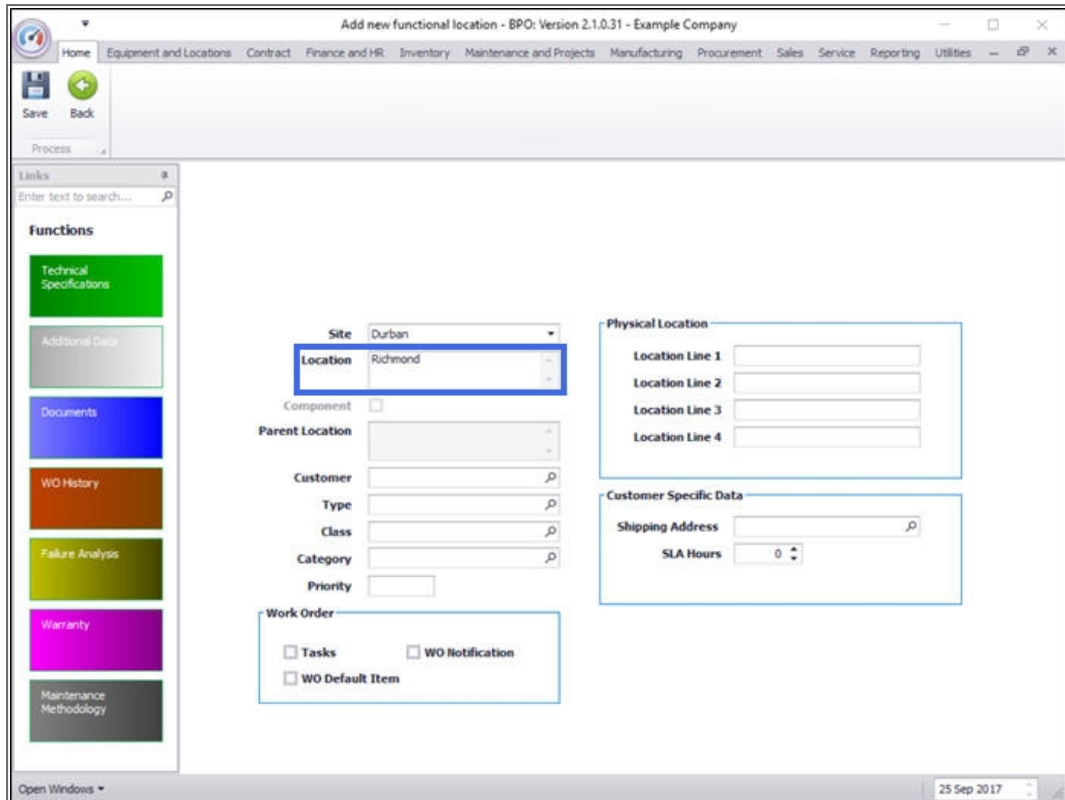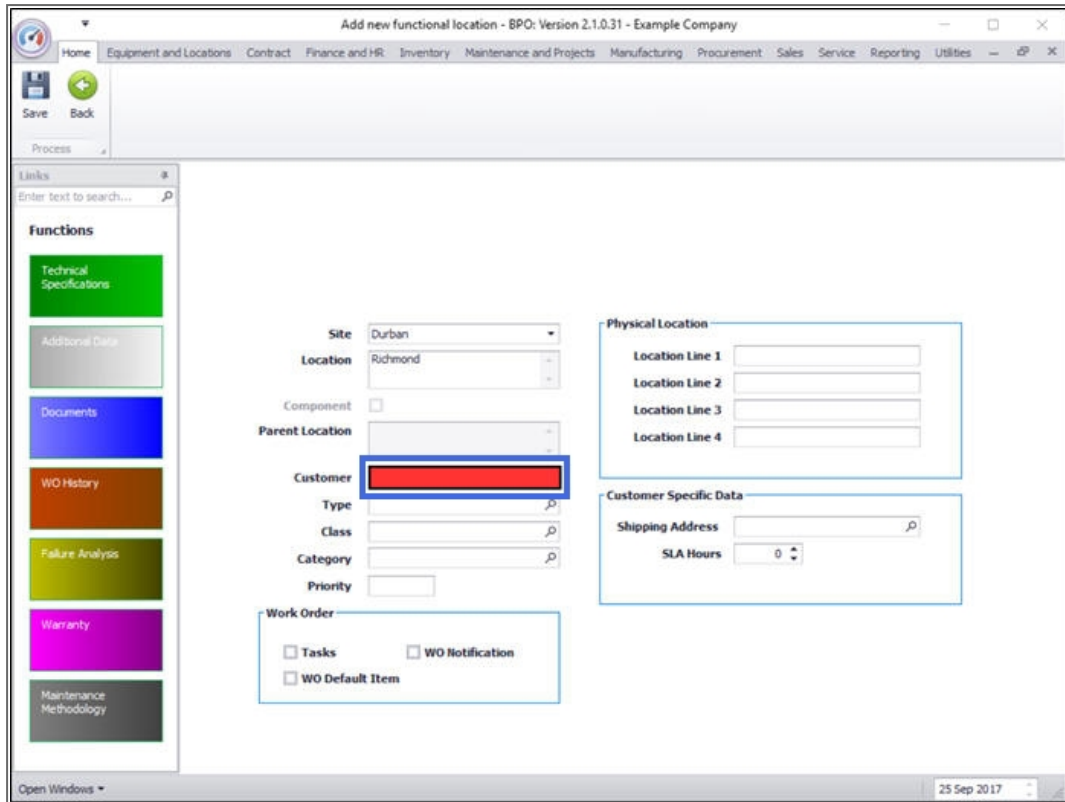
LINK LOCATION

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

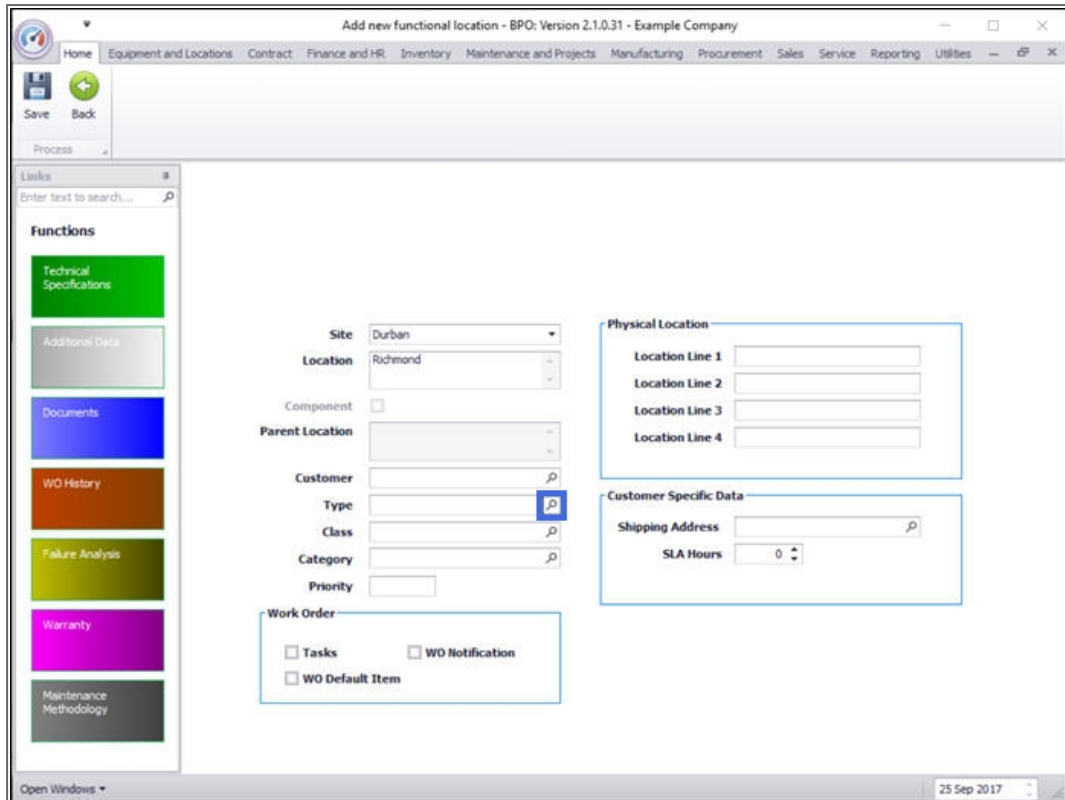- Leave the *Customer* field blank as you are creating a generic location.

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*.
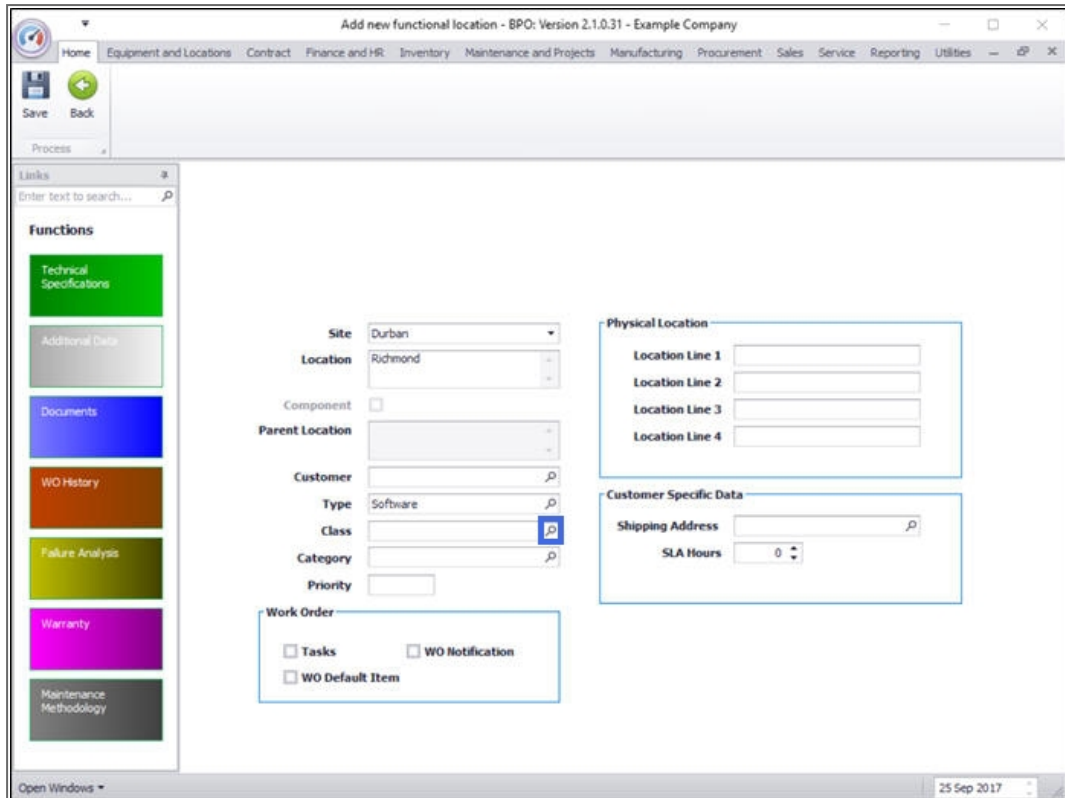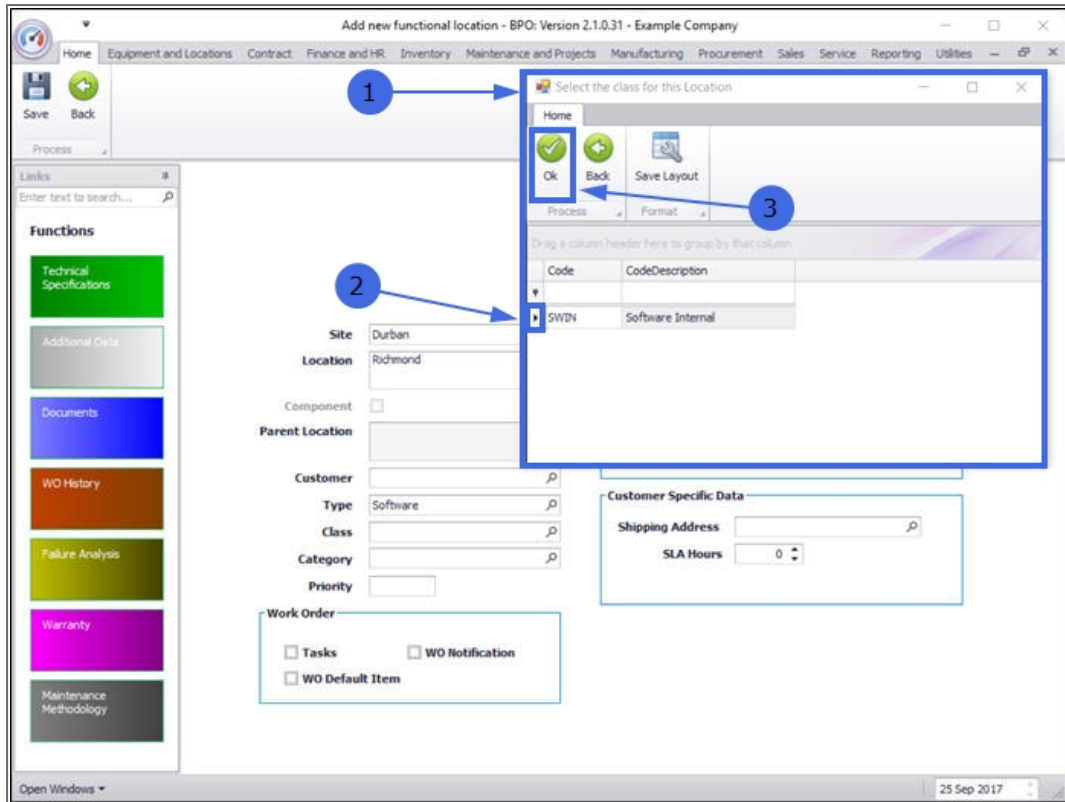
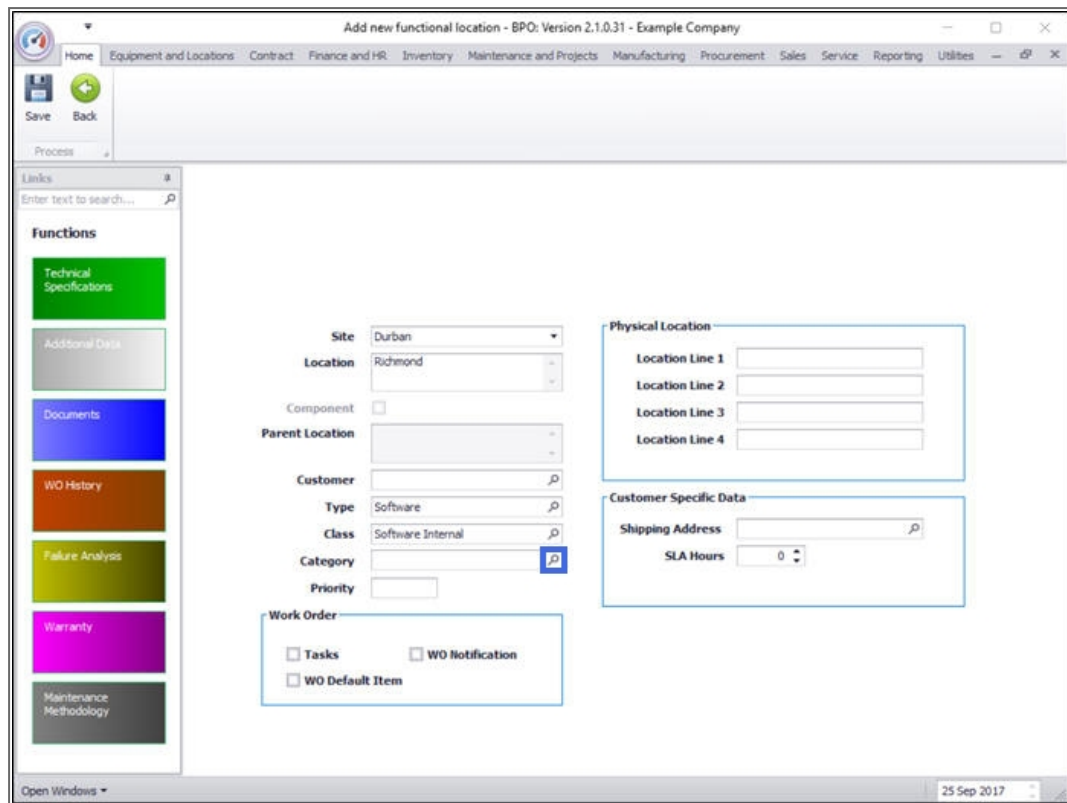## SELECT CLASS

- 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*.

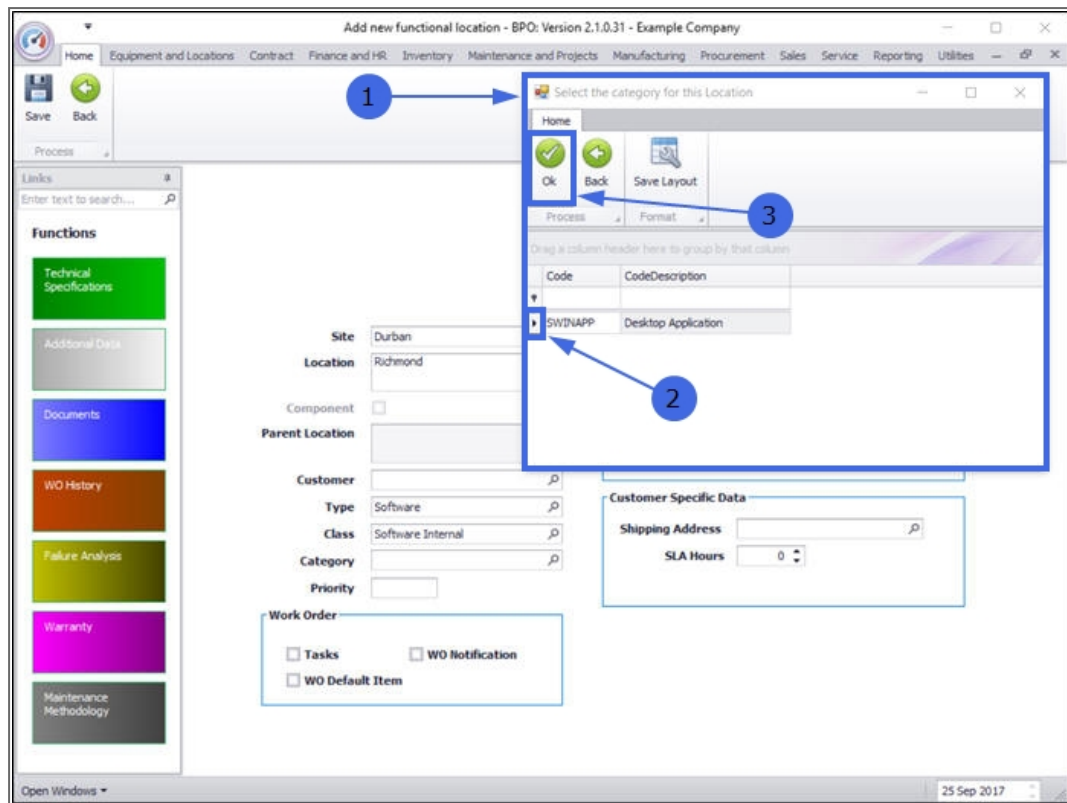## SELECT CATEGORY

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

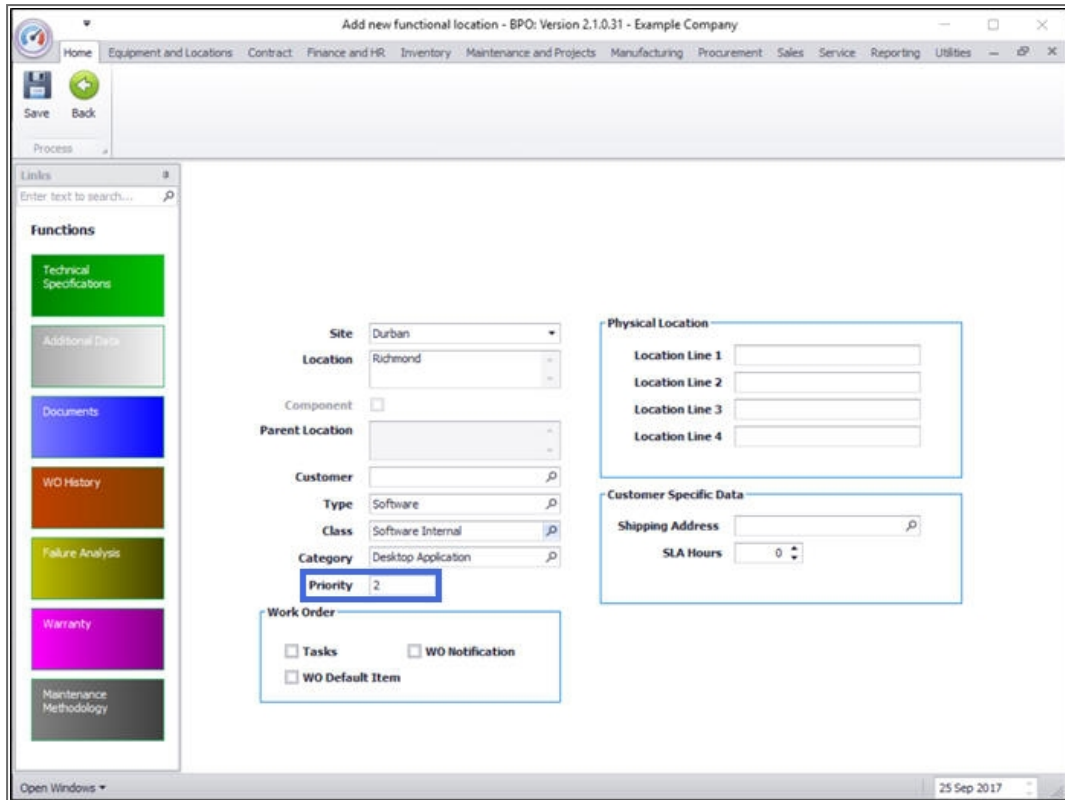1. The *Select the category for this Location* screen will pop up.
2. Select the *row* of the Category you wish to assign to this Location.
3. Click on *Ok*.

SELECT PRIORITY

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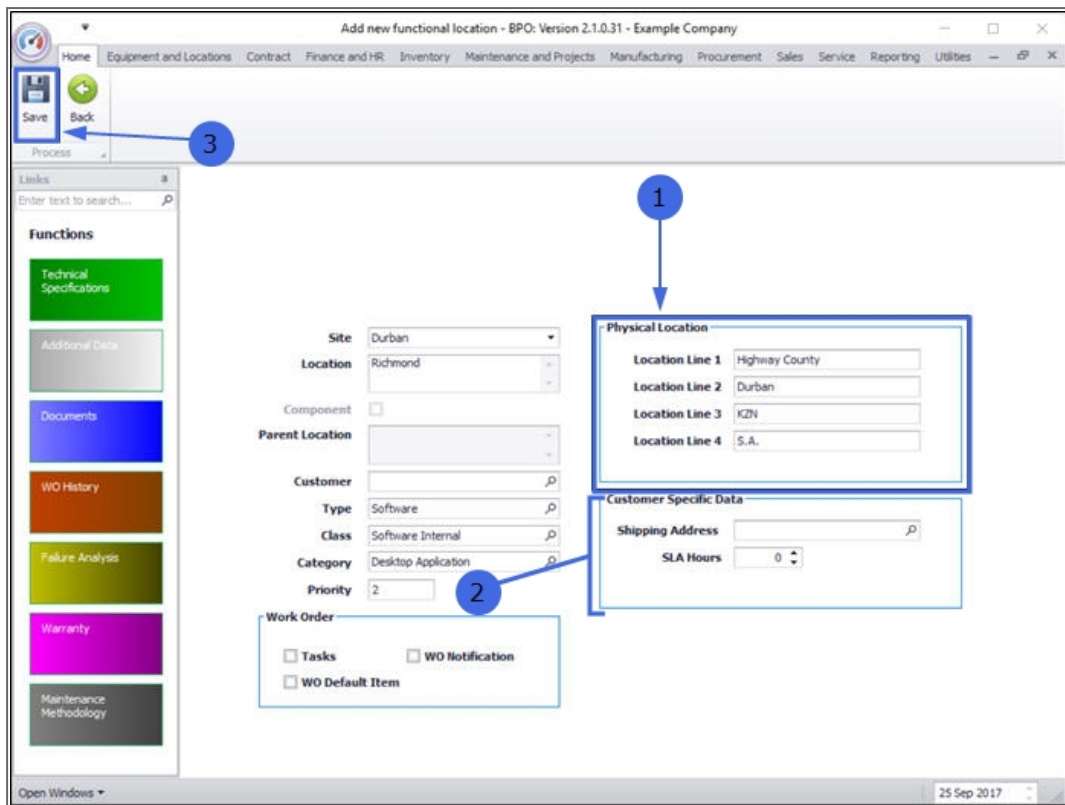   - (**1** = Most Important, **5** = Least Important)

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.
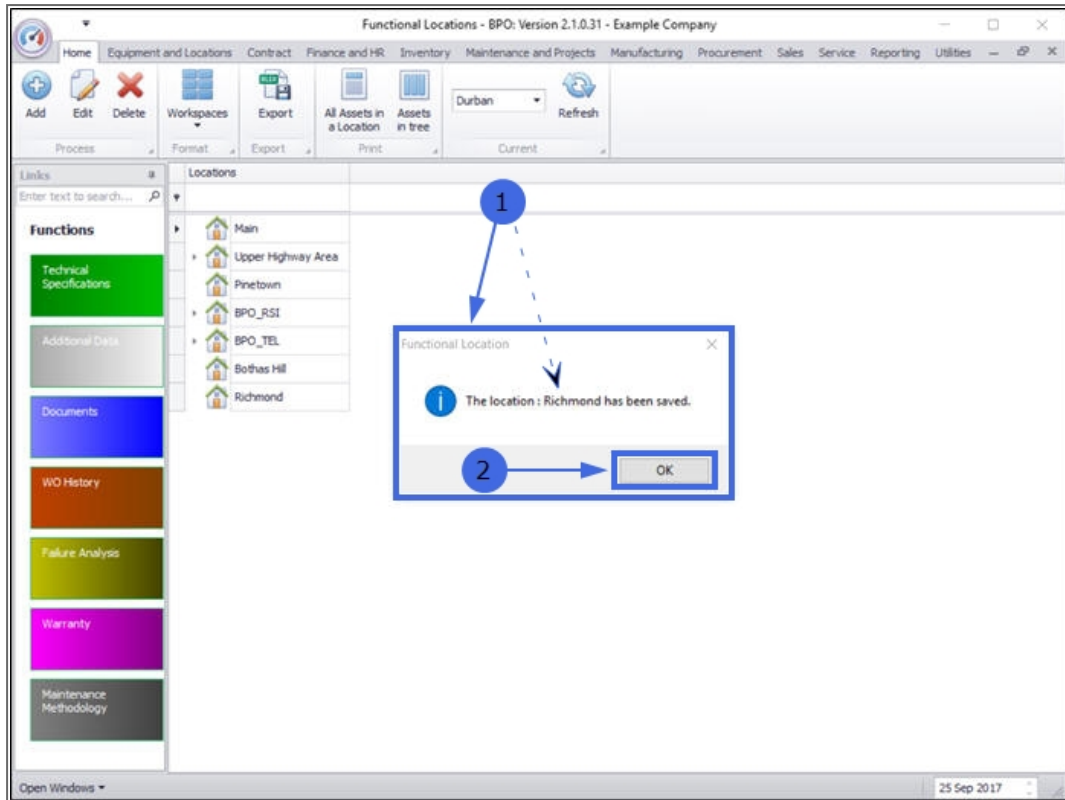
SAVE LOCATION

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.
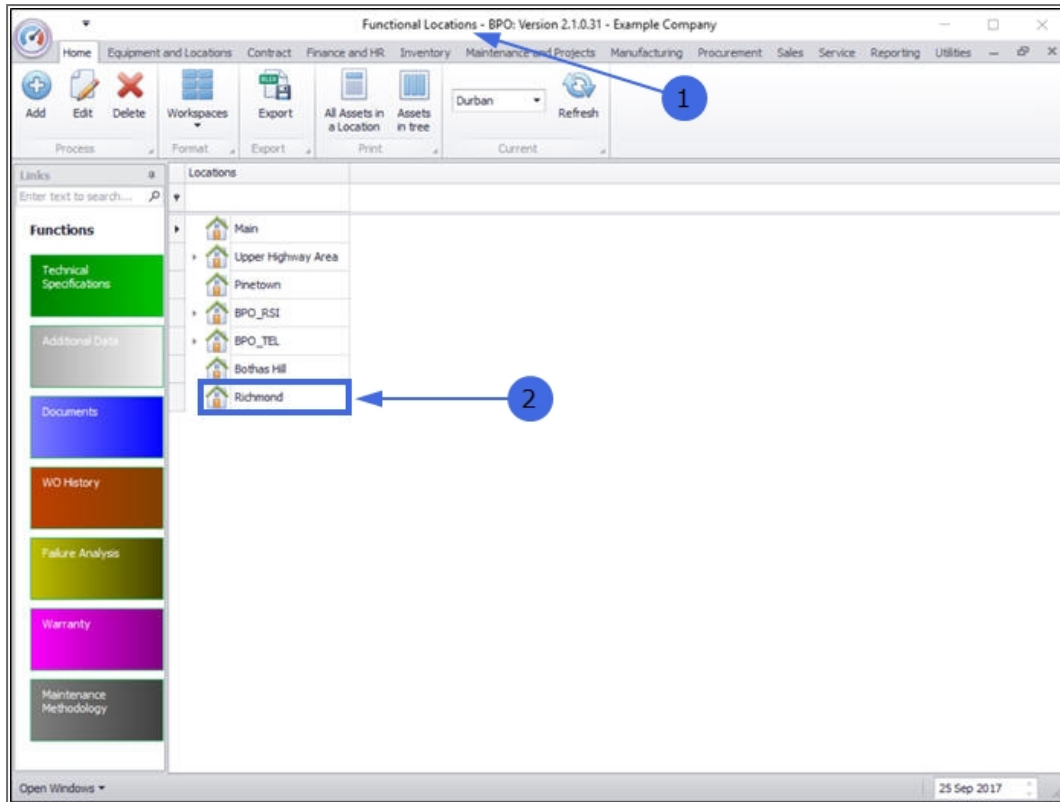
Related Topics

- [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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