Link User Guide

Link Actions

Add Link

To start this action, click the   Add Link   button above the Link listing.

Creates a new Link.

When this action starts a form is displayed to enter the details of the Link.

Each field customises or controls some aspect of the Link display or behaviour.

Some fields are required and must be entered before the Link can be added, the required fields are Show on List Items.

Although some fields are not required, it is best practice to populate these, including .

Most fields are optional, and are often prefilled with a good default so these may not need to be changed. These optional fields allow further customisation.

Alongside most fields is a small ? icon with further help for each field. This information is included at the end of this document.

View

To start this action, select the Link you need to work on, and click the   🔍 View   button in the   ⋮   More Menu on that row.

Display the selected Link.

This action displays the Link similarly as for an Edit Action, except none of the fields are editable.

Useful for reviewing records without making any changes.

Edit

To start this action, select the Link you need to work on, and click the   ✏   button on that row.

Edits an existing Link.

When this action starts a form is displayed with the existing Link and any previous information entered.

Each field customises or controls some aspect of the Link display or behaviour.

When editing it is advisable to only change what is needed and most fields may not need to be changed. These other fields allow further customisation.

Alongside most fields is a small ? icon with further help for each field. This information is included at the end of this document.

Delete

To start this action, either select the Link to work on and click the   🗑   button on that row. Or CTRL+click to select multiple Links and click the   🗑   button above the Link listing.

Deletes an existing Link.

When this action starts a screen is displayed to check for Confirmation before the Action continues.

On this screen a list of warnings may be provided to show the impact of deleting this Link.

Search

To start this action, click the   🔍   button above the Link listing.

Allows a Search of Links.

This allows a simple text search across all Links.

To search a specific field select the field from the drop down list

Adv. Search

To start this action, click the   🔍 Adv. Search   button above the Link listing in the   ⋮   More Menu.

Allows an Advanced Search of Links.

The Advanced Search opens a new section at the bottom of the Links and allows several distinct features:

- Multiple Search Lines : allows Link matches to be identified where more than one search criteria is required

- Nested Searches : allows a combination of AND and OR logic to find results

- Saved Filters : allows a search to be saved as a Filter

- Export : allows the results of the search to be exported and worked on separately

Refresh

To start this action, click the ↻ Refresh button above the Link listing in the ⋮ More Menu.

Refresh the list of Links.

Allows the list of records to be refreshed.

Although the records in the system will automatically update if a another Admin is using the system at the same time, the Refresh button allows the list to be manually updated.

Export to List

To start this action, click the ☁ Export to List button above the Link listing in the ⋮ More Menu.

Export the Link results shown to a List.

An Export List can be downloaded as a CSV file, or through any number of customised Export Templates.

Export to List will begin the process of Exporting the Links shown.

Once the data is exported it is available to download as a CSV file with all columns.

A list of Export Templates for Links will be shown, select the Export Template to Print, Export to Document, Export to CSV or Email.

Before using a template an opportunity to amend the template is provided.

See Export Templates for more information on Managing Export Templates.

Export All

To start this action, click the ⤓ Export All button above the Link listing in the ⋮ More Menu.

Export all the Links to a List.

Exactly as for "Export to List" except rather than just Exporting the Link results shown, all Links will be expored.

Export Item

To start this action, select the Link you need to work on, and click the ☁ Export Item button in the ⋮ More Menu on that row.

Export only the selected Link to a List.

Exactly as for "Export to List" except rather than just Exporting the Link results shown, only the selected Link is exported.

Choose Columns

To start this action, click the ⚙ Choose Columns button above the Link listing in the ⋮ More Menu.

Changes the Columns shown in the Link Listing.

The Choose Columns screen shows the Selected Columns on the left, and the Link Columns available on the right.

Drag and Drop column names between the two columns.

Alternatively double click on a column name to move it from one list to the other.

On the left the Selected Columns can be dragged up and down to change the ordering in the Link Listing.

Manage Filters

To start this action, click the ᗕ Manage Filters button above the Link listing in the ⋮ More Menu.

Creates custom Filters for Links.

A Filter is a saved Advanced Search. Multiple Filters can be created for Links.

These Filters appear at the top of the Link listing.

When the Filter is selected the results are restricted to only include those which match the Filter.

The Manage Filters action shows a list of existing Filters for Links where these can be managed.

Link Field Reference

Tags

Select the tags that allow this item to be found as a related item when another item is displayed

Show on List Items

This field is mandatory.

Check for the Link to be shown on Web Link List Items

Attribute Set

The attributes in the selected attribute set will be made available to this item