

# Location User Guide

## Location Actions

### Add Location

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

Creates a new Location.

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

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

Some fields are required and must be entered before the Location can be added, the required fields are Featured.

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 Location you need to work on, and click the  **View** button in the  More Menu on that row.

Display the selected Location.

This action displays the Location 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 Location you need to work on, and click the  button on that row.

Edits an existing Location.

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

Each field customises or controls some aspect of the Location 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.

### Copy

To start this action, select the Location you need to work on, and click the  **Copy** button in the  More Menu on that row.

Copies an existing Location.

The selected Location is copied and the word (Copy) will be added to the name of the new Copy

### Delete

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

Deletes an existing Location.

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 Location.

### Search

To start this action, click the  button above the Location listing.

Allows a Search of Locations.

This allows a simple text search across all Locations.

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 Location listing in the  More Menu.

Allows an Advanced Search of Locations.

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

- Multiple Search Lines : allows Location 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 Location listing in the  More Menu.

Refresh the list of Locations.

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 Location listing in the  More Menu.

Export the Location 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 Locations shown.

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

A list of Export Templates for Locations 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 Location listing in the  More Menu.

Export all the Locations to a List.

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

## Export Item

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

Export only the selected Location to a List.

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

## Choose Columns

To start this action, click the  **Choose Columns** button above the Location listing in the  More Menu.

Changes the Columns shown in the Location Listing.

The Choose Columns screen shows the Selected Columns on the left, and the Location 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 Location Listing.

## Manage Filters

To start this action, click the  **Manage Filters** button above the Location listing in the  More Menu.

Creates custom Filters for Locations.

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

These Filters appear at the top of the Location 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 Locations where these can be managed.

## Location Field Reference

### Location Marker Image

Image to use as the pin for this location. The bottom centre of the image is the point of the location.

### Featured

This field is mandatory.

Set to prioritise a location in the listing.

### Tags

Allow a user to be able to search by tags

### Listing Summary

Text that is displayed in the search results

### Listing Detail

Text that is displayed when viewing the details from the search results