

## Location Management

This document provides information on multiple methods for system administrators to add, update or deactivate location records.

### General Settings

Individual location records can be setup and modified manually via General Settings.

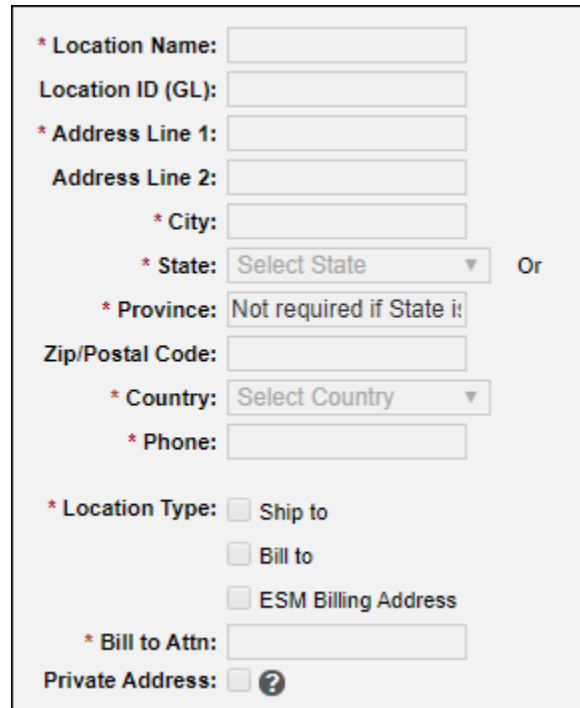
**Navigation:** *Menu > Admin > Select Function > General Settings > Add/Edit Locations*

**Step 1: Enter location name.**

**Step 2: Enter required fields.**

The following fields are required:

- *Location Name*
- *Address Line 1*
- *City*
- *State (or Province)*
- *Zip/Postal Code (US only)*
- *Country*
- *Phone*
- *Location Type*
- *Bill to Attn*
- *Private Address*



The screenshot shows a form with the following fields and options:

- \* Location Name:
- Location ID (GL):
- \* Address Line 1:
- Address Line 2:
- \* City:
- \* State:  Or
- \* Province:
- Zip/Postal Code:
- \* Country:
- \* Phone:
- \* Location Type:
  - Ship to
  - Bill to
  - ESM Billing Address
- \* Bill to Attn:
- Private Address:  ?

### Tips:

- *Foreign country (non-US) records cannot contain a **State** value and must contain a **Province** value.*
- *If integrated with an ERP/GL system, the **Location ID (GL)** field value must match the ERP/GL system's location code/ID value.*
- *A location can be designated as a **Ship to** and/or a **Bill to** type.*
- *Private Address checkbox allows administrators to identify those locations whose address details should not be visible in certain areas of the application.*

**Step 3: Select the Update button to save.**

## Deactivate Locations

System Administrators are able to Deactivate Locations.

**Navigation:** *Menu > Admin > Select Function > General Settings > Deactivate Locations*

**Step 1:** *Search by location name.*

**Step 2:** *Un-check the Active field checkbox to deactivate a location record.*

**Tips:**

- *Transactions assigned to active locations should be processed prior to deactivating the location record.*
- *Users assigned to active locations will need new locations assigned after deactivating the location record.*
- *Once deactivated, a location record can only be reactivated by ESM staff.*
- *Location records can be deactivated in bulk using the location upload template. The status column should read 'inactive'*

## Import Management

Individual and multiple location records can be setup and modified via Import Management settings.

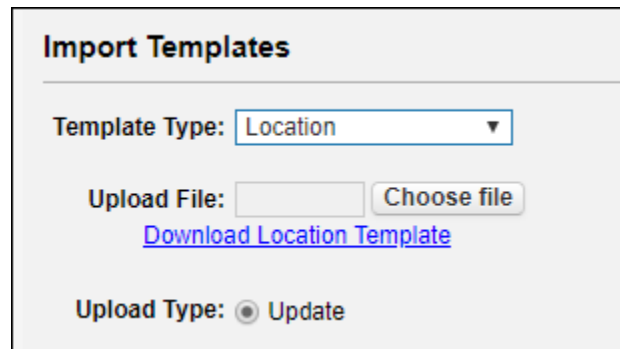
**Navigation:** *Menu > Admin > Select Function > Import Management > Import Templates*

**Step 1:** *Select "Location" from the Template Type field.*

**Step 2:** *Download the Location Template.*

The following fields are required:

- *Location Name*
- *Address Line 1*
- *City*
- *State (or Province)*
- *Zip/Postal Code (US only)*
- *Country*
- *Phone*
- *Location Type*
- *Bill to Attn (Bill to Locations only)*



**Import Templates**

Template Type:

Upload File:

[Download Location Template](#)

Upload Type:  Update

**Tips:**

- *To deactivate location records via import, the status column should read 'inactive'.*
- *Transactions assigned to active locations should be processed prior to deactivating the location record. If not, the transaction will be deleted automatically.*

**Step 3:** *Create/Save the Location data file.*

*Step 4: Select the import parameters and the Location data file.*

**Tips:**

- Select **Update** to update all matching location records in the system with the data in the file. This will not affect records not included in the file.
- Imported data files are processed nightly.

*Step 3: Select Update to start the import process.*