Chainformation Admin User Guide

(Locations)

<u>Last Updated: April 24, 2025</u>

Welcome to the **Chainformation** user guide. In this manual, we will learn how to manage the **Locations** section on the **Our organisation** page.

A **Location** on a **Chainformation** platform is the same thing as the local work site, restaurant, shop, office, etc. of a brand/company.

Important info: Locations were previously referred to as Units on a Chainformation platform. So, you might find the terms alternatively in the other user guides until we update the term "unit/units" with "location/locations" in all relevant documents.

*NOTE to SUPER ADMIN: You must first make the proper settings for **Local, Central** and **Global** levels of the **Our organisation** function in your **system setup** to control which **Roles** in your organisation are allowed to add new locations and manage existing location accounts. <u>See the User Guide for **Roles Administration**</u>*
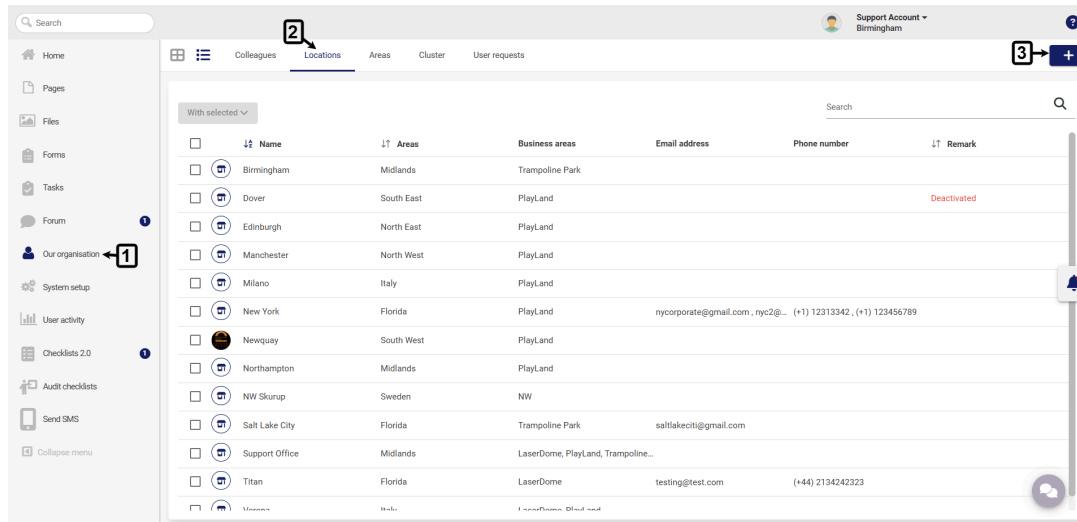
Here is a list of all the features of the **Locations** module that we will discuss in this manual.
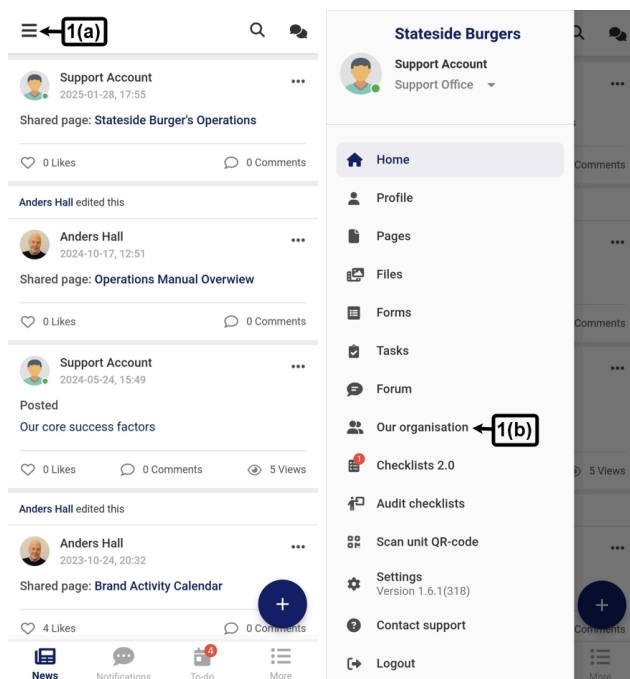
Add a New Location

Once you have logged in to the **Chainformation** platform, then follow these navigation steps to **add** a **new location** to your **organisation.**

1. Click the **Our organisation** button in the left-side menu to open the **Our organisation** page.

If you are accessing the platform from the **Chainformation** mobile app, you can open your profile menu by clicking the **hamburger** icon in the top-left corner of your mobile screen.

By default, you will be redirected to the **Colleagues** tab.

https://chainformation.com/userguides

2. Click the **Locations** button in the header menu to open the **Locations** tab.

3. Click the **(+)** icon in the top-right corner of the **Locations** page to add a new location.

This will open the **New location** page.

4. On the **New location** page, upload a display image of the new location from your device or **Chainformation File Manager**. See the User Guide for **Files**

5. Under the **Location information** heading, enter the new location name in the **Name** field.

6. Enter a **Description** of the new location (if applicable).

7. Select one or more **Business areas** of the new location. See the User Guide for **Business Areas**

8. Under the **Account status** heading, choose what will be the current account status of the new location.

Make sure you keep the **Active** checkbox enabled, otherwise, the location will be deactivated.

8(a). Select the **Continuous** option and set a **Start date** if you want to keep the new location account active for an indefinite period.

8(b). Select the **Time limited** option and set a valid **Start/End date** if you want to activate the new location account for a definite period.

Note: The location will be deactivated if you set the **End date** in the past.

9. You can see/save the **QR Code** generated for the new location under the respective heading (if applicable). See User Guide for **QR Codes**

10. Now, go to the **Area and contact** tab to add address and contact information of the new location.

11. Select the geographical **Area** in which the new location is being established. See the User Guide for **Geographical Areas**

12. Select the **Cluster** to which the new location belongs (if applicable). See the User Guide for **Clusters**

13. Enter the **email address** associated with the new location (if applicable).

14. Enter the **phone number** associated with the new location (if applicable).

15. Enter the **Street address** of the new location (if applicable).

Note: You can add more than one email address, phone number, and/or street address by pressing the **Add** (**+**) icon next to the respective fields.

16. Now, go to the **Other** tab and enter the required data for the location custom fields (if applicable).

Note: The **Other** tab will be hidden if you have added no location custom fields in your system settings. See the User Guide for **Custom Fields (Other settings)**

Also, you can't add data for a custom data field of a location if your role is not allowed to view and manage this custom field. See the User Guide for **Our Organisation Access Levels (Roles Administration)**

Once you have entered all the location details, carefully review all the information you've entered under different headers on the **New location** page.

Note: All fields with the **Asterisk** (*****) sign are mandatory and you cannot save a location profile if you have left any one of the mandatory fields empty.

17. Click the **Save** button in the top-right corner of the page to add the new location account in your organisation.

Now, you and your selected colleagues can associate this location to different users and share different content items with this location. <u>See the User Guide for **Colleagues** and **Sharing Selection**</u>

View Existing Locations in Your Organisation

Once you have opened the **Locations** tab on the **Our organisation** page as demonstrated in the previous section, you can view the names of different locations in your organisation and their corresponding details on this page.

1. Under the **Names** heading, you can see the names and display images (if any) of all the locations listed on the page.

2. You can also use the **Search** field to find a location based on any of the available data/information. <u>See the User Guide for **Search**</u>

3. You can see the area, business area(s), primary email address, and phone number of each location next to their name in the list.

4. Under the **Remarks** heading, you can see the **Deactivated** label for the location whose account is currently deactivated.

5. You can review the general, contact details and colleagues associated with a location by clicking its name on the **Locations** page.

This will open the Location profile dialogue where you can review its profile details as follows.

Review a Location Profile
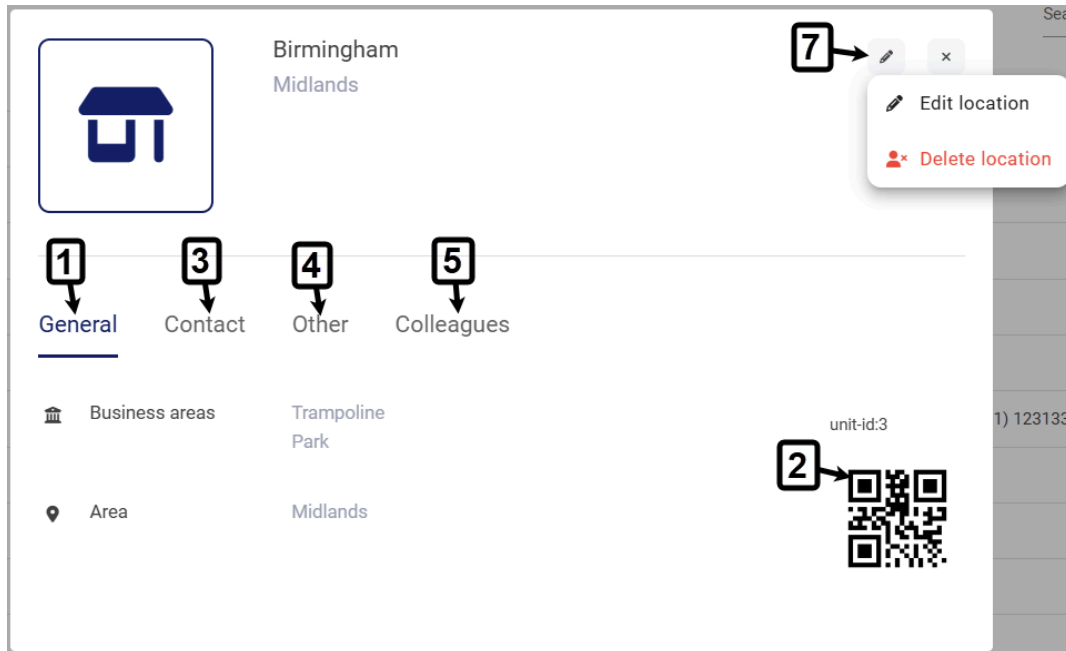
1. Under the **General** header, you can review the area, and business area(s) of the selected location.

2. You can also review/scan the selected **location ID** and **QR Code** on the **General** tab.

3. Under the **Contact** header, you can review the email address(es), phone number(s) and street address of the selected location (if available).

4. Under the **Other** header, you can review data of the selected location for the custom fields (if available).

Note: You can't see the information related to a custom data field for a location if your role is not allowed to view and manage this custom field. See the User Guide for **Custom Fields (Other Settings)** and **Our Organisation Access Levels (Roles Administration)**

5. Under the **Colleagues** header, you can view the selected users who belong to the selected location.

6. You can see the last sign in of the listed colleagues to their Chainformation account under the **Latest activity** heading on the **Colleagues** tab of the selected location.

CHAINFORMATION
Stick to your concept

Note: You can't see the **Latest activity** information of a colleague if you don't have the editing rights for this particular user. See the User Guide for **Our Organisation Rights (Roles Administration)**

7. You can edit or delete a location by clicking the **Edit** (✎) icon in the top-right corner of the location profile dialogue and then, selecting the required option from the dropdown.

Clicking on the **Edit location** option will open the **Edit location** page where you can change the account status, and other profile details of the selected location.

Edit a Location Profile

1. On the **Edit location** page, you can update the selected location information on different tabs as demonstrated in the previous section. See the User Guide for **Add a New User**

Remember, certain changes in a location profile e.g. changing/removing a business area, geographical area, and/or cluster might affect sharing selection of different content items shared with this location.

Some users associated with this location might lose access to these content items after you save this change. See the User Guide for **Sharing Selection**

Deactivate/Activate a Location Account

2. **Disable** the **Active** checkbox under the **Account status** header to deactivate the selected location account.

Note: When you deactivate a location, all users who belong to only this location will also be deactivated.

Similarly, all such user accounts will be reactivated automatically after you reactivate the location by **enabling** the **Active** checkbox under the **Account status** header on the **Edit** location page. See the User Guide for **Deactivated Users (Colleagues)**
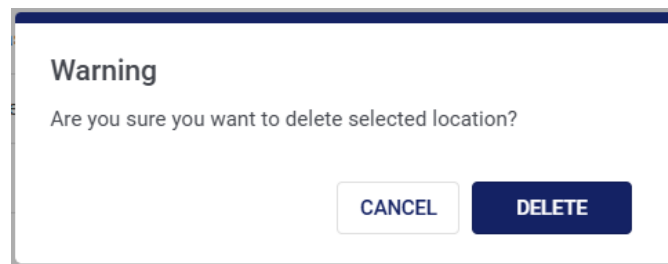

Delete a Location Account

Remember, there is no **Trash** folder for the **Locations** module on the **Chainformation** platform from which you can restore a deleted location. Therefore, when you delete a location, the system will remove it from the database permanently.

Nonetheless, follow the navigation steps demonstrated below to delete a location if you still want to do this.
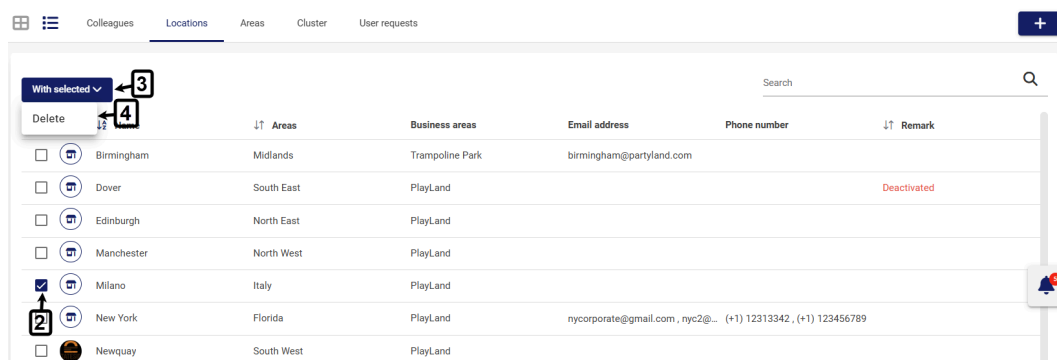
1. Access the **Locations** tab on the **Our organisation** page by following the navigation steps as demonstrated in the previous section.

2. On the **Locations** page, navigate to the location(s) you want to delete and **check** the **checkbox** next to its name.

3. Click the **With selected** button above the listed locations.

4. Click the **Delete** option from the **With selected** dropdown to delete the selected locations.

5. You can also delete a location by selecting the **Delete location** option from the **Edit** menu on the location profile dialogue. Refer to item 7 in the User Guide for **Review a Location Profile**

6. Click the **DELETE** button on the warning dialogue to delete the selected location account(s).

Warning

Are you sure you want to delete selected location?

CANCEL   DELETE

Note: You cannot delete a Location until you have deleted *all* the users who only belong to this location or assigned them to another location. The system will show an error when you will try to delete a location that has users who are only attached to this location.

⊘ **Oops! Something went wrong.**

Oops! You can't delete the location until all colleagues attached to it are deleted or assigned to at least one other location. Perhaps you should consider deactivating this location instead?

OK

https://chainformation.com/userguides