Places Screen

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The **Places Screen** gives you the ability to create, read, update and delete places your drivers visit.
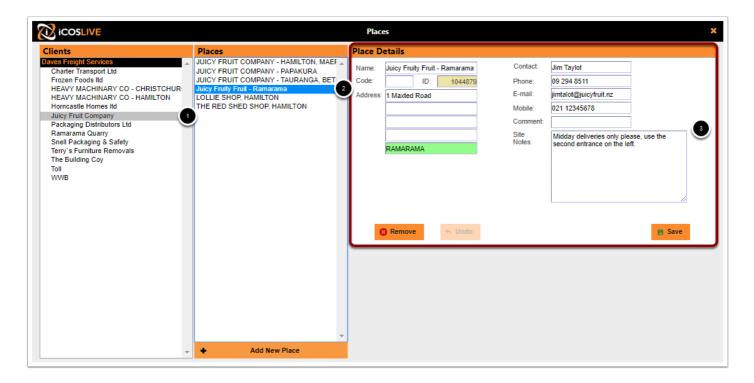When a place has been created or used by one of your clients a link is created between them.
If you select one of your clients from the Places Screen's first pane you are presented with a list of each of these linked places in the second.

To see the Places Screen a user must be assigned the **Super User** role and the **Places Maintenance** task

Viewing a client's place

1. Select a **client** from the first pane
2. Select a linked **place** from the second pane
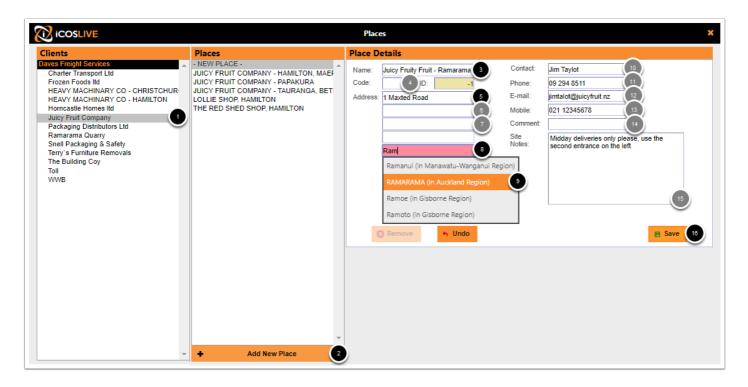3. The place's data is visible in the third pane

Creating a new place for a client

1. Select the **client** you want to make a place for from the first pane
2. Click the "**Add New Place**" button
3. Enter the place's **name**
4. Optionally enter the place's *****code** ()
5. Enter the place's street address on the first address line
6. Optionally enter a second address line
7. Optionally enter a third address line
8. Start entering the suburb, town or city the address belongs to in the fifth address line. This address line helps to drive automatic rating and as such should be as specific as possible (i.e. entering a region would make per suburb rating difficult)
9. As you type you will be presented with a drop down of options, from which you must make a selection
10. Optionally enter a ******contact** name
11. Optionally enter a ******phone** number
12. Optionally enter an ******email** address
13. Optionally enter a ******mobile** number
14. Optionally enter a ******comment**
15. Optionally enter any **site notes** for this place
16. Click **Save** to create your new place

This field is only used for custom integrations and in most cases can be skipped

**This field is for information purposes or custom integrations and in most cases is not visible outside of this screen*

Places can also be created when you make a new booking

Removing a place

Removing a place destroys the link between a client and a place, which stops it from being automatically suggested when a booking is made for a client.
When a place is removed it is not deleted nor does it affect any bookings using this place to ensure that auto rating is not affected.

1. Select a **client** from the **Clients pane**
2. Select a linked **place** from the **Places Pane**
3. Click the "**Remove**" button from the **Place Details pane**

Modifying a place

Modifying a place creates a new version of the original place with any new details that you have supplied.

Bookings containing the original place are not modified to ensure that auto rating is not affected.

1. Select a **client** from the **Clients pane**
2. Select a linked **place** from the **Places Pane**
3. *Follow the same steps you used to create a new place*

Site Notes

Preview