



Locations: Creating a new entry

The Locations application is still in its beta phase so please bear this in mind when using it. As changes are made and more stable versions are released, the guides will be updated to reflect this.

The permission to be able to create a new location is given by administrators on the [admin side of the application](#).

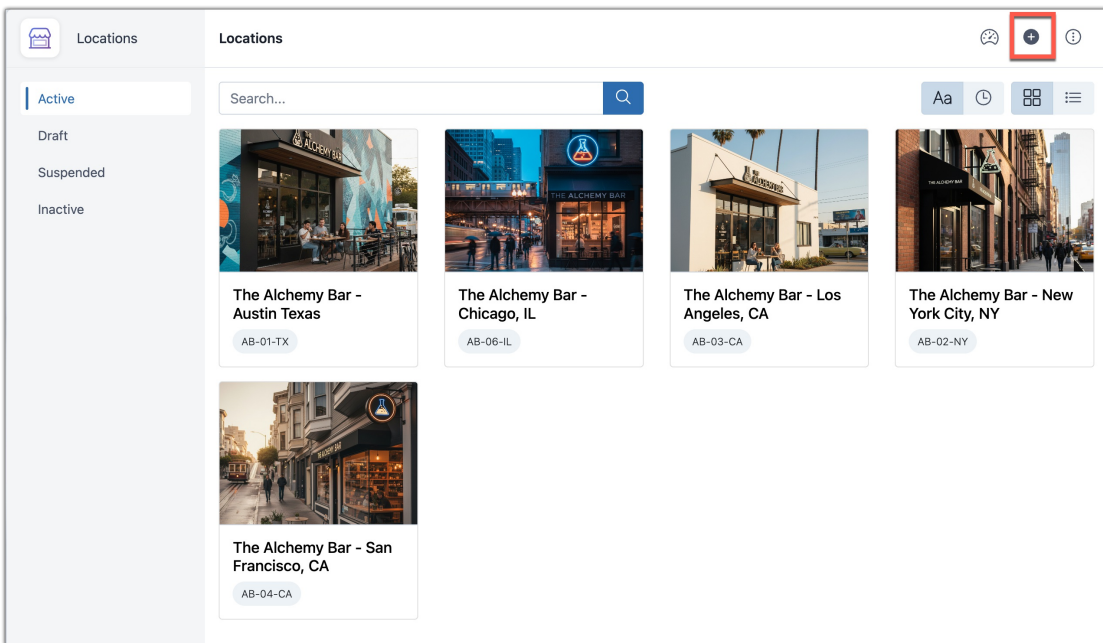
Anyone with this permission will see the 'Create new' button on the front end.

This guide will detail all the steps to create a new location:

- [Step 1: Click the 'Create new' button](#)
- [Step 2: Fill out the Location's profile](#)
- [Step 3: Choose the appropriate status](#)
- [Step 4: Save](#)
- [Step 5: Check out the other tabs that now appear](#)
- [Step 6: Link other applications to the location](#)
- [Step 7: \(If not already\) Put the location in 'Live' Status](#)

Step 1: Click the 'Create new' button

On the [front end of Locations](#), click the cross button to begin a new location:



Step 2: Fill out the Location's profile

Various fields appear; most are optional. Fill out all the relevant information you have about the new entry.

Any information filled out will appear on the [front end of the location](#) and be visible to those with [permissions](#).

- **Name:** The title of the location
- **Image:** Upload a picture to accompany the location
- **System Group:** Select which [People Group](#) this location represents and determine who will have [permissions](#) to it (Groups that appear here across users are based on the permissions they have to create locations)
- **ID/Code:** Any relevant internal reference
- **Legal Entity name:** If applicable
- **Description:** Some details about the location

Business address

Address line 1

Address line 2

City

Region

Postcode

Country

Principal contact

Website

Phone

Email

Map Location

- **Business Address:** Use all relevant fields to enter the appropriate location address
- **Principal contact:** Choose an Intranet user to appear attributed to the location
- **Website, Phone & Email:** Enter this if applicable, they will appear on the location for others to see
- **Map Location:** Set an address through Google Maps (Requires Google Maps [API key](#) on your site)

Step 3: Choose the appropriate status

Generally, a new location will be placed in 'draft' first, as there are more edits to be made once it has been initially saved.

'Live' status works best for Locations that have up-to-date information and are to be taken as accurate.

Suspended and inactive can be given to locations that fit these definitions.

Users will see locations across statuses, as long as they have 'view' rights to each.

Status

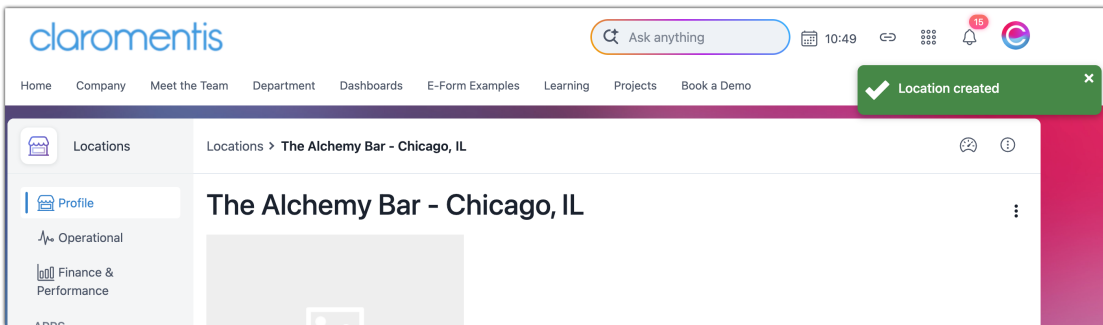
- ✓ Draft
- Live
- Suspended
- Inactive

Step 4: Save

Click 'Save' to create the location in your chosen status.

A confirmation message will appear on screen to confirm that the location was created.

It can now be further edited and its status changed by a user with 'edit' permissions.



Step 5: Check out the other tabs that now appear

After initial creation, more tabs appear on the left when viewing or editing the location.

- Operational

Click into the tab and then the 3-dot menu on the right to edit this area.

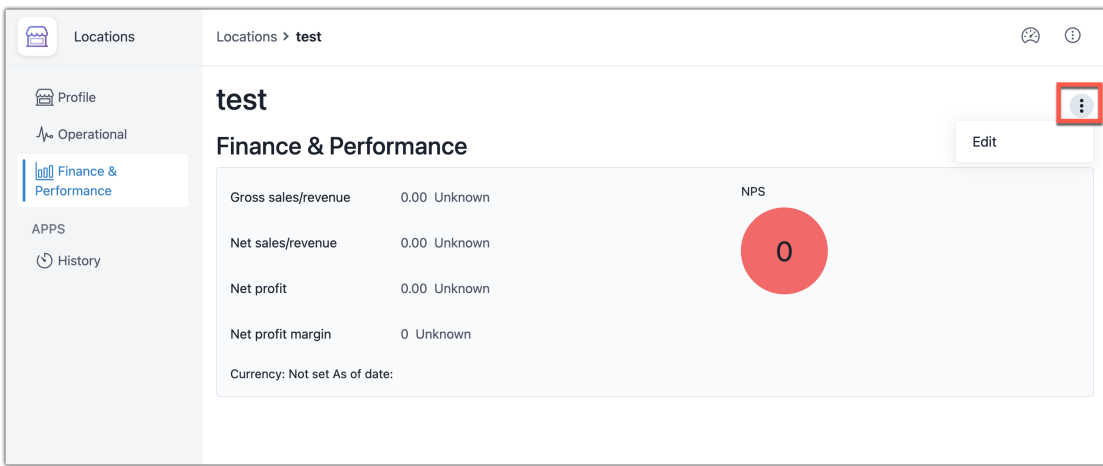
Enter a start date/end date and a description of operations as required.

Click 'save' to apply; the information entered can be viewed in this tab going forward.

- Finance & performance

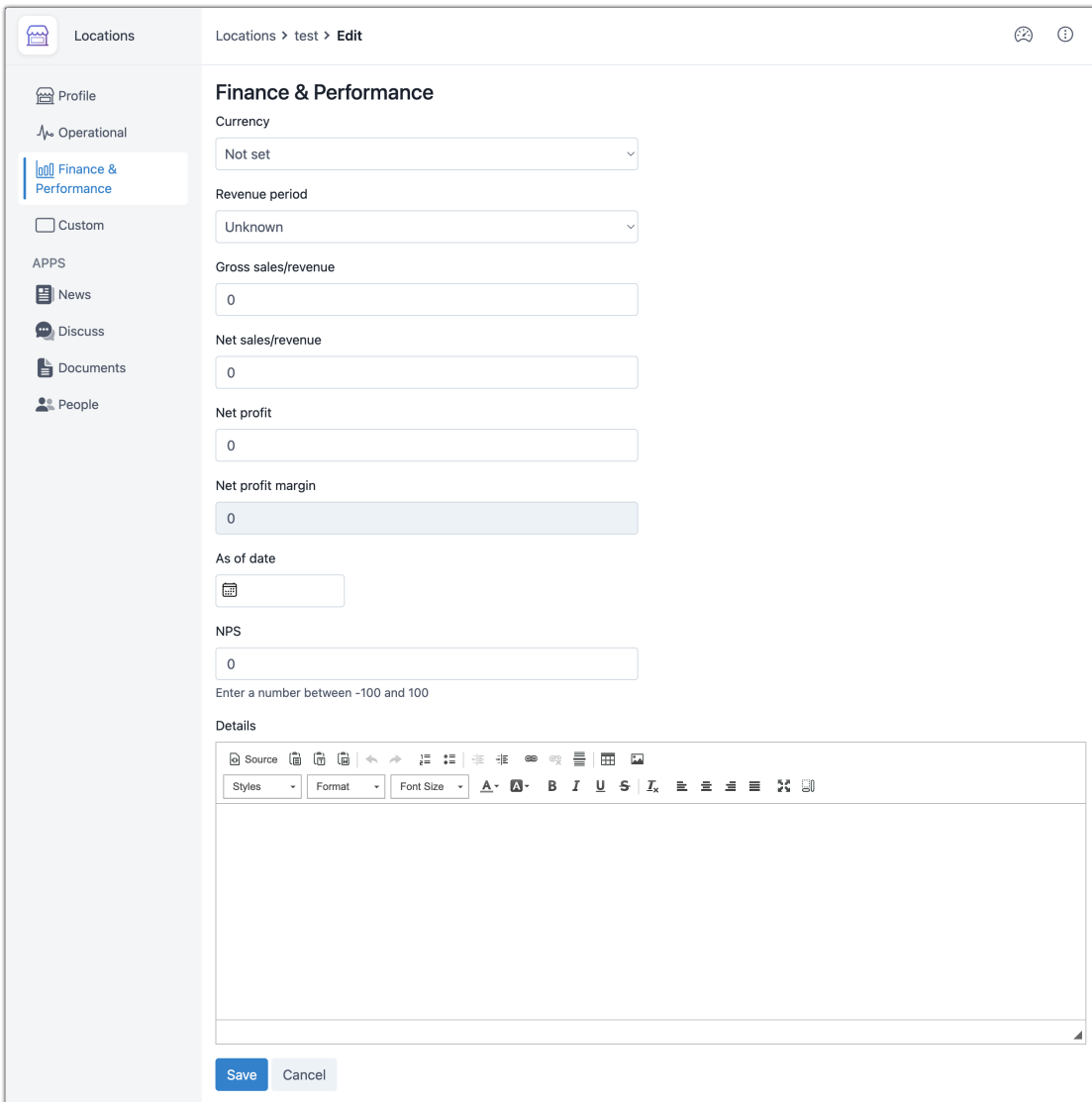
This will only appear if the option has been enabled by administrators on the [admin side of the application](#).

Click into the tab and then the 3-dot menu on the right to edit:



Fill out the fields and click 'save' to apply.

The values entered will appear in this tab and the area going forward.



- Custom

Just like the embed component available for pages, it works the same in Locations.

Use the embed code to display content from other sites, viewable under this tab.

If your team knows how to write code for this, they can enter it here, or you can request further assistance with any bespoke components you may want to see alongside our developers by raising a change request ticket [here](#).

Locations > sgfsfgs > Edit

Custom

Enable component

Title

Type

- Code
- Video
- Site (iframe)
- Document

Paste embed code here

Allow scroll

Here is a stock example of an embed we titled 'Revenue to Date':

```
<iframe width="600" height="371" seamless frameborder="0" scrolling="no" src="PUT YOUR PUBLIC DOCUMENT URL HERE"></iframe>
```

This will pull through the contents of the public file that has been used, e.g. a Google sheet, Word file, etc



- Reports

These tabs will appear if the setting on the admin side has been set to allow each to appear.

There is no further confirmation needed; the relevant user information will pull through to each tab.

Locations > The Alchemy Bar - Chicago, IL

The Alchemy Bar - Chicago, IL

Business Type: Limited Liability Company (LLC)
Primary NAICS Code: 722515 (Limited-Service Restaurants – Specialty Food Services)
Description of Business Activities:
 Midwestern Craft Beverage Authority, LLC, operating as "The Alchemy Bar," is a high-volume, specialty beverage retailer focused on non-alcoholic craft drinks and gourmet pastries in the Chicago Metropolitan Area. The business emphasizes sophisticated, high-quality preparation methods for its proprietary line of nitrogen-infused cold brews, elevated sparkling elixirs, and seasonal hot beverages, catering to the city's professional and university-based consumer base. The operation is designed for speed and consistency, leveraging proprietary technology to deliver a premium product and experience efficiently across the busy morning and lunchtime rushes.

203 N LaSalle Street, Retail Space 1R
 The Loop / Central Business District
 Chicago
 IL
 60601
 United States

Midwestern Craft Beverage Authority, LLC

Franchise News & Marketing

Covid resurgence Rumours Wiped us in May
 13 December 2025
 Check our revenue summary to see what happened to us in May!

- History

Not a tab that needs anything edited, it pulls from the audit log and will detail all changes made to the location over time:

Locations > test

test

History

10 entries per page

Area	Change	Date & time	User	Source
<ul style="list-style-type: none"> Profile 	<ul style="list-style-type: none"> image: => New image uploaded group: Unknown group (Id: 0) => London, UK name: => test code: => test-123 legal_name: => testing description: => 1 principal_contact_id: Unknown user (Id: 0) => Abigail Clark website: => www.fake.com phone: => 01234 675438 	16-04-2026 10:32	Claromentis Administrator	webpage

Step 6: Link other applications to the location

Click into the 'Profile' tab of the location and click the 3-dot menu on the right to edit it.

Locations > The Alchemy Bar - Austin Texas

The Alchemy Bar - Austin Texas

Alchemy Brew & Elixir Co., LLC operates "The Alchemy Bar" as a premium beverage and modern pastry establishment. The business specializes in and meticulously prepared beverages, including nitrogen-infused cold brew teas, sophisticated botanical elixirs, and gourmet sipping chocolates. It also offers a curated selection of globally inspired, modern pastries. The establishment emphasizes a unique customer experience through high-quality ingredients, expert preparation techniques, and an inviting, contemporary atmosphere. The business is committed to providing a sophisticated, alcohol-free social space for discerning consumers

1205 E 6th St, Suite 100
 Austin
 Texas
 78702
 United States

Alchemy Brew & Elixir Co., LLC

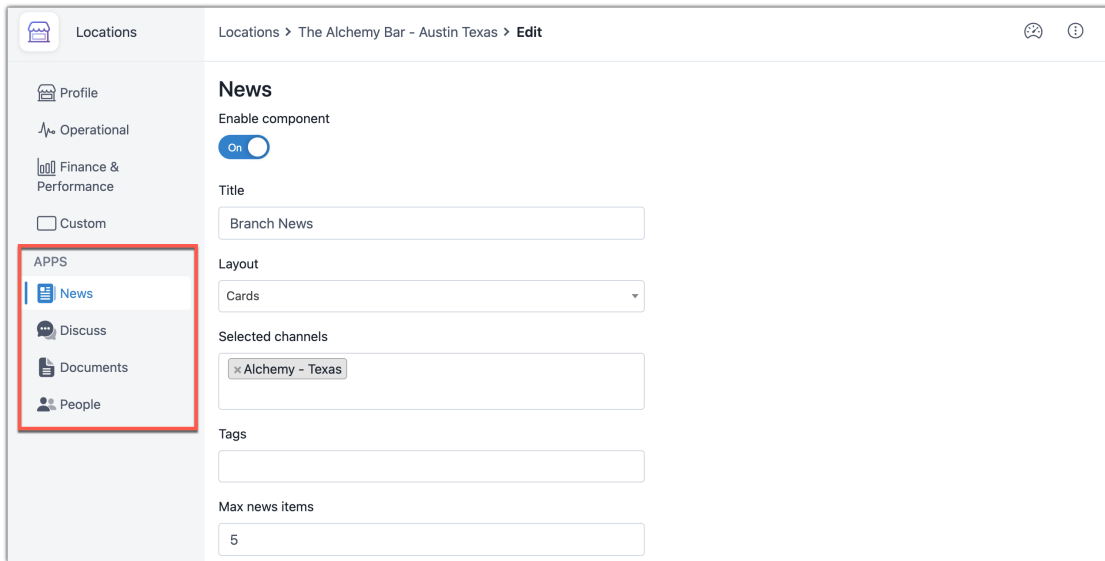
AB-01-TX

Edit
 Delete

At this point, the 'Apps' tab on the left will appear.

Click into each and apply settings for the content you want to appear in the location.

Save each as you go. The content will pull through to the location.



The screenshot shows the 'Edit' interface for a location. On the left, a sidebar lists various components: Profile, Operational, Finance & Performance, Custom, and a red-bordered 'APPS' section containing News, Discuss, Documents, and People. The 'News' component is selected. The main area shows the 'News' configuration: 'Enable component' is turned 'On', the title is 'Branch News', the layout is 'Cards', and the selected channel is 'Alchemy - Texas'. There are also fields for 'Tags' and 'Max news items' set to 5.

- News

We recommend creating a News channel for this location for use here, or instead pulling through a generic channel if there is no news specific to this location to use or be set up. Ensure the permissions set on the chosen [News channel\(s\)](#) include the users who can access the location, otherwise they will not be able to see the articles.

- Discuss

We recommend creating a Topic for this location for use here, or instead pulling through a generic one if there is no discussion specific to this location required. Ensure the [permissions set on the Topic](#) include users who can access the location, otherwise they will not be able to see it.

- Documents

We recommend creating a folder for this location for use here, or instead pulling through a generic one if there are no files specific to this location that users will need to share or access. Ensure the [permissions set on the folder](#) include users who can access the location, otherwise they will not be able to see it.

- People

Choose whether to display the People List component in the location.

The users shown will be those who are members of the group chosen in the 'System Group' field for the location. Users will need to be in the [same Intranet area](#) to be able to view the users successfully.

Step 7: (If not already) Put the location in 'Live' Status

Edit the location a final time, change the status to 'Live' and save.

Those with permissions can [manage it over time and update it](#) as necessary.