STEP ONE | Creating a cardholder custom list

Click on the 'Person' tab, select 'cardholder custom list'

Click add

Name your custom list and click 'save'

Click 'add' to add list values

View ' Regions ' Cardholder Custom List

NAME:	Regions
Description:	
Created By:	Felicity Stevenson

edit

LIST VALUES
None

add

Name values and click 'save'

Add ' Regions ' Cardholder Custom List Value

Value: VIC

cancel   **save**

Assign cardholders to the list values by clicking the green triangle

View ' Regions ' Cardholder Custom List

NAME:	Regions
Description:	
Created By:	Felicity Stevenson

edit

LIST VALUES

Name	Assign	Assigned
NSW	▲	4
VIC	▲	0
	Total:	4

add   **remove**

Search for the cardholders and check the tick box, scroll to the bottom and click save. Once the screen has refreshed you will need to click 'return' to go the main list.

Assign ' Regions ' Cardholder Custom List Value ' NSW '

Cardholders

- ◉ Contractors from: `Onsite Track Easy Pty Limited ▼`
- ○ Employees
- ○ All
- ○ All with value: `NSW ▼`

[list] List all cardholders of the selected type and whether they currently have the 'NSW' value

Found 1 Cardholder

[tick all]	Name	Current Value	ID	DOB	Type	Company
☑	Stevenson, Felicity	NSW	000 465 383	09 Aug 39	Contractor	Onsite Track Easy Pty Limited

[return] [save] Assign 'NSW' value to all ticked persons, and remove it from any unticked persons who previously had it

▶ If you tick a cardholder with a **Current Value** and then **save** it, the value will be changed to **'NSW'**

Click 'lists' to be taken back to the main screen

View ' Regions ' Cardholder Custom List

NAME: Regions
Description:
Created By: Felicity Stevenson

[edit]

LIST VALUES

Name	Assign	Assigned
☐ NSW	▲	4
☐ VIC	▲	0
	Total:	4

[add] [remove]

▶ Use the add button to add a new value to this list
▶ Click a name to edit it
▶ Click the ▲ icon to **assign** a value to multiple cardhold
▶ Use the remove button to permanently delete ticked val

[lists]

N.B To use a list in reporting, it will need to be in your favorites.
Deleting a list will delete it from the whole site not just from your view.

Cardholder Custom Lists

add

FAVOURITES

List Name	Assignments	Values	
☐ Regions	4	2	(NSW, VIC)

move in/out favourites   delete list

NON-FAVOURITES