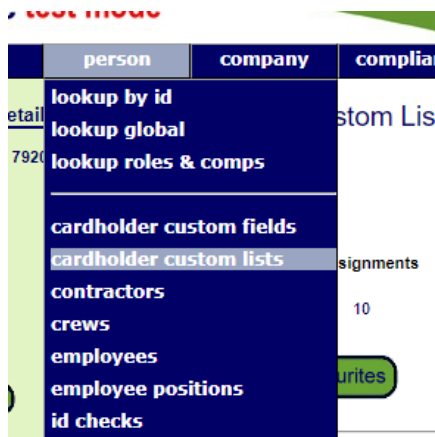


User Guide

Creating Custom Lists| Cardholders

STEP ONE | Creating a cardholder custom list

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



Click add

Cardholder Custom Lists



Name your custom list and click 'save'

Add Cardholder Custom List

Name:

Description:

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:

[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
<input type="checkbox"/>	NSW	▲	4
<input type="checkbox"/>	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:

 Employees

 All

 All with value:

list

List all cardholders whether they curre.

Found 128 Cardholders

tick all	Name	Current Value	ID	DOB	Type	Company
<input checked="" type="checkbox"/>	Adams, Simon	NSW	000 148 454	01 Jan 82	Employee, Contractor	Cpb Contractors Pty Limited
<input checked="" type="checkbox"/>	Adlam, Benjamin	NSW	000 959 819	03 Feb 94	Employee, Contractor	Cpb Contractors Pty Limited
<input checked="" type="checkbox"/>	Agha, Ibrahim	NSW	000 056 918	02 Nov 72	Employee, Contractor	Cpb Contractors Pty Limited
<input type="checkbox"/>	Aleksov, Jovan		000 068 092	12 Mar 63	Employee, Contractor	Cpb Contractors Pty Limited
<input type="checkbox"/>	Amarasingham, Sylvia		000 967 759	09 Nov 63	Employee	Cpb Contractors Pty Limited
<input type="checkbox"/>	Arcidiacono, Sam		000 089 878	17 Mar 63	Employee, Contractor	Cpb Contractors Pty Limited

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
<input type="checkbox"/> NSW		4
<input type="checkbox"/> 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
<input type="checkbox"/> Regions	4	2 (NSW, VIC)

move in/out favourites

delete list

NON-FAVOURITES