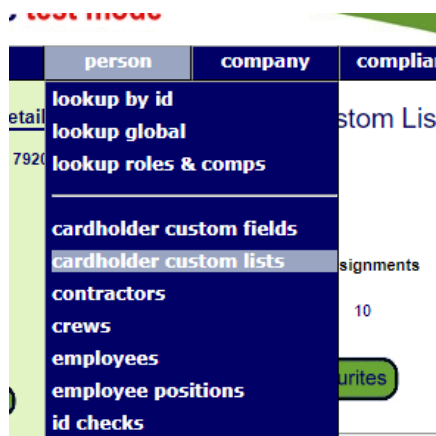


User Guide

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 of the selected type and whether they currently have the 'NSW' value*

Found 1 Cardholder

tick all	Name	Current Value	ID	DOB	Type	Company
<input checked="" type="checkbox"/>	Stevenson, Felicity		000 465 383	18 May 89	Employee, 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*

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