

Locations Table

The Locations table is used to store Location records, which are used to store specific information about where the companies in Company records are found geographically. Some companies have multiple Location records because they have multiple physical company locations, such as one Location record for their headquarters and another Location record for a subsidiary. To view some examples of companies with multiple Location records, sort the records in the Location table alphabetically by clicking Company Name.

ID ↓	Location Name	Company Name	City	State / Province
18	Acme Micro Fremont	Acme Micro	Fremont	CA
17	Agiloft Primary Billing	Agiloft	Petersburg	FL
16	Acme Micro Main Office	Acme Micro	Loma Linda	CA

Use Case

Location records can be created by members of the Admin, Admin Import, Business Admin, Contract Creator, Contract Manager, Contract Requester, Sales, and Supplier groups. Each Location record can be linked to a parent Company record from the Companies table. These Location records contain a single address, but can have multiple Location Types.

Location records are created directly from the Locations table, but can also be created by conversion. Location records can be created by conversion when:

- A new Company record is created from within a Contract record
- A Lead record is converted to an Opportunity record

When you name a Location record, that name should reflect the actual name of the building, or a similar distinguishing factor; there are other, built-in fields that are used to hold more granular information. While you can add city or town names to Location records by simply typing the name into the City field, you must select a value for the Country field from the Country table with the look-up icon.

Save

Cancel

Location: Ingels & Herd main office

ID92

Company NameIngels & Herd

Primary RoleSupplier

*Location NameIngels & Herd main office

*Location TypeHeadquarters

Location Details

People and Contracts

Emails

History

<<>>

Collapse All

Street Address

Street Address 1123 South Street

Street Address 2Suite 200

CityNorth Fork

CountryUnited States

State AbbreviationMN

Zip or Postal Code04356

TelephoneExt.

Fax

Map It

Find Local Hotels

Find Local Hotels

Automation

In the Standard System Demo, the Location table contains five rules. These rules are accessed by expanding the Locations table in the left pane, selecting Setup Locations, and then selecting the Rules tab:

- **Create: Contract Source Actions (web, API):** This rule runs whenever a new Location record is created by a user or by another rule in the system. It consists of two Linked Field actions: L: Set Location ID in source contract and L: Set Main Location ID in company. L: Set Location ID in source contract is a Linked Field action that links the ID field in a Location record to the Location ID field in a related Contract record, and L: Set Main Location ID in company is a Linked Field action that links the ID field in a Location record to the Main Location ID field in a related Company record.
- **Edit: Update State/Province (web, API):** This rule uses a saved search to run whenever the State / Province field of a Location record is edited. It uses an If-Then-Else action called "I: Set State province" to ensure that there is always a value in the State / Province field.

- **Create: On Creation Actions:** This rule runs whenever a new Location record is created by a user or by another rule in the system. It consists of an If-Then-Else action that ensures the Address fields have values.
- **Create: Copy state/province to new fields:** This rule runs whenever a new Location record is created by a user or by another rule in the system. This rule uses the same action as Edit: Update State/Province (web, API), but runs when a record is created instead of edited.
- **Edit: handle address update if it changes:** This rule uses a saved search to run whenever the address fields of a Location record are edited. It uses an If-Then-Else action called "I: Set Address fields" to ensure that there are always values in the Address fields.

Ownership

Location records are owned by the user who creates them. Specifically, a record is owned by the user whose Login matches the Creator Login field.