



## How to Create, Edit and Delete an Area

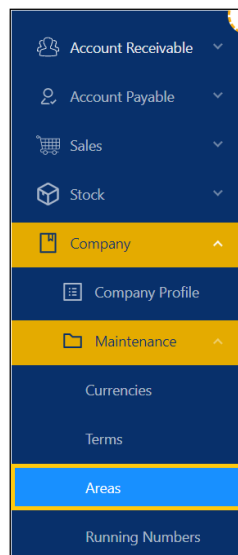
### Overview:

*Area* is a system function that allows the user to group its Suppliers and Customers by Area. This function can be used to generate various reports by filtering them by Area.

### Procedure:

#### How to Create Area

1. In Navigation pane, go to Company > Maintenance > Areas

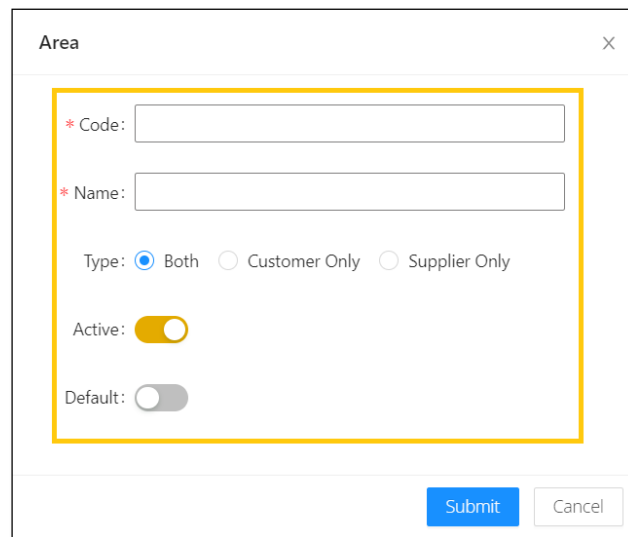


2. In the **Area List View**, click **Add**

Areas				
			Search...	<input type="button" value="Q"/> <input type="button" value="Add"/> <input type="button" value="Reload"/>
Code	Name	Type	Tags	Action
CITY	CITY	Customer Only		Delete
LAG	LAGUNA	Customer Only		Delete
LOCAL	LOCAL	Supplier Only		Delete
MAL	MALAYSIA	Customer Only		Delete
MAND	MANDALUYONG CITY	Supplier Only		Delete

3. Supply the fields with data;

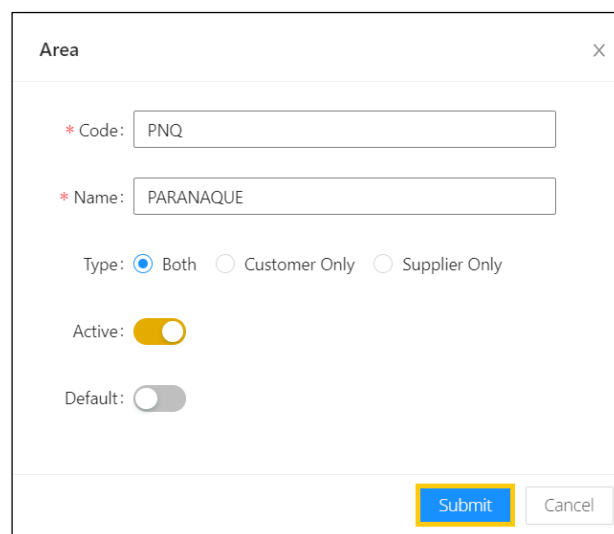
- **Code:** This is a compulsory field with maximum of 20 alphanumeric length
- **Name:** This is a compulsory field which you need to indicate the name of the Area
- **Type:** This is to determine where the area can be used,
  - Both
  - Customer Only
  - Supplier Only
- **Active:** This is a function to set if an Area is still used. If an Area will not be used anymore, disable the toggle to make as Inactive.
- **Default:** This is a function that allows you to set the Area as Default in Suppliers and Customers Maintenance based on the Type.



The screenshot shows a modal window titled "Area" with a close button (X) in the top right corner. The form contains the following fields and controls:

- \* Code:** An empty text input field.
- \* Name:** An empty text input field.
- Type:** Three radio button options: "Both" (selected), "Customer Only", and "Supplier Only".
- Active:** A toggle switch that is currently turned on (yellow).
- Default:** A toggle switch that is currently turned off (grey).
- At the bottom right, there are two buttons: "Submit" (blue) and "Cancel" (grey).

4. Once done, click **Submit**



The screenshot shows the same "Area" modal window, but now the fields are filled with data:

- \* Code:** The text "PNQ" is entered in the input field.
- \* Name:** The text "PARANAQUE" is entered in the input field.
- Type:** The "Both" radio button remains selected.
- Active:** The toggle switch remains turned on (yellow).
- Default:** The toggle switch remains turned off (grey).
- The "Submit" button at the bottom right is now highlighted with a yellow border.

## How to Edit Area

1. In Area List View, click **Code** to open.

Areas				
			Search...	<input type="button" value="Q"/> <input type="button" value="Add"/> <input type="button" value="Reload"/>
Code	Name	Type	Tags	Action
PNQ	PARANAQUE	Both		Delete
PSG	PASIG	Supplier Only		Delete
QC	QUEZON CITY	Customer Only		Delete

2. Then Supply the Fields that needs to be edited. Once done, click **Submit**

Area

\* Code: PQ

\* Name: PARANAQUE

Type: ☒ Both ☐ Customer Only ☐ Supplier Only

Active: ☒

Default: ☐

## How to Delete Area

1. In Area List View, click **Delete** on the Area

Areas				
			Search...	<input type="button" value="Q"/> <input type="button" value="Add"/> <input type="button" value="Reload"/>
Code	Name	Type	Tags	Action
PQ	PARANAQUE	Both		Delete
PSG	PASIG	Supplier Only		Delete
QC	QUEZON CITY	Customer Only		Delete

2. When the confirmation message prompted, click **Yes**

Areas			
Code	Name	Type	
PQ	PARANAQUE	Both	Delete
PSG	PASIG	Supplier Only	Delete
QC	QUEZON CITY	Customer Only	Delete

**Note:** Area can only be *deleted* if the Area has not been tagged in a Customer and Supplier with Transactions.

### Application:

Area can now be used in Customer and Supplier Maintenance.

Customer Details

<

>

Cancel

\* Save and New

...

\* Customer Name

ADVANCE TRADING CORPORATION'

\* Terms

30 DAYS

Category

CORPORATE

\* Control Acc.

103-0000

Auto Code

\* Customer Code

101-A001

\* Currency

PHP

Agent

CINDY

Area

PQ

TIN No.

780-090-909

0000

Business Nature

TRADING

Website

www.advance.com

Status

ACTIVE

BIR Info

ADVANCE TRADING CORP'.

Deferred VAT



For further concerns regarding this matter, please contact support to assist you or create ticket thru this link <https://support.qne.com.ph>