Country User Guide

Country Actions

Add Country

To start this action, click the   Add Country   button above the Country listing.

Creates a new Country.

When this action starts a form is displayed to enter the details of the Country.

Each field customises or controls some aspect of the Country display or behaviour.

Some fields are required and must be entered before the Country can be added, the required fields are VAT Exclusion Mode.

Although some fields are not required, it is best practice to populate these, including .

Most fields are optional, and are often prefilled with a good default so these may not need to be changed. These optional fields allow further customisation.

Alongside most fields is a small ? icon with further help for each field. This information is included at the end of this document.

View

To start this action, select the Country you need to work on, and click the   View   button in the ⋮ More Menu on that row.

Display the selected Country.

This action displays the Country similarly as for an Edit Action, except none of the fields are editable.

Useful for reviewing records without making any changes.

Delete

To start this action, either select the Country to work on and click the 🗑 button on that row. Or CTRL+click to select multiple Countries and click the 🗑 button above the Country listing.

Deletes an existing Country.

When this action starts a screen is displayed to check for Confirmation before the Action continues.

On this screen a list of warnings may be provided to show the impact of deleting this Country.

Search

To start this action, click the 🔍 button above the Country listing.

Allows a Search of Countries.

This allows a simple text search across all Countries.

To search a specific field select the field from the drop down list

Adv. Search

To start this action, click the 🔍 Adv. Search button above the Country listing in the ⋮ More Menu.

Allows an Advanced Search of Countries.

The Advanced Search opens a new section at the bottom of the Countries and allows several distinct features:

- Multiple Search Lines : allows Country matches to be identified where more than one search criteria is required

- Nested Searches : allows a combination of AND and OR logic to find results

- Saved Filters : allows a search to be saved as a Filter

- Export : allows the results of the search to be exported and worked on separately

Refresh

To start this action, click the ↻ Refresh button above the Country listing in the ⋮ More Menu.

Refresh the list of Countries.

Allows the list of records to be refreshed.

Although the records in the system will automatically update if a another Admin is using the system at the same time, the Refresh button allows the list to be manually updated.

Export to List

To start this action, click the ☁ Export to List button above the Country listing in the ⋮ More Menu.

Export the Country results shown to a List.

An Export List can be downloaded as a CSV file, or through any number of customised Export Templates.

Export to List will begin the process of Exporting the Countries shown.

Once the data is exported it is available to download as a CSV file with all columns.

A list of Export Templates for Countries will be shown, select the Export Template to Print, Export to Document, Export to CSV or Email.

Before using a template an opportunity to amend the template is provided.

See Export Templates for more information on Managing Export Templates.

Export All

To start this action, click the ⬇ Export All button above the Country listing in the ⋮ More Menu.

Export all the Countries to a List.

Exactly as for "Export to List" except rather than just Exporting the Country results shown, all Countries will be expored.

Export Item

To start this action, select the Country you need to work on, and click the ☁ Export Item button in the ⋮ More Menu on that row.

Export only the selected Country to a List.

Exactly as for "Export to List" except rather than just Exporting the Country results shown, only the selected Country is exported.

Choose Columns

To start this action, click the ⚙ Choose Columns button above the Country listing in the ⋮ More Menu.

Changes the Columns shown in the Country Listing.

The Choose Columns screen shows the Selected Columns on the left, and the Country Columns available on the right.

Drag and Drop column names between the two columns.

Alternatively double click on a column name to move it from one list to the other.

On the left the Selected Columns can be dragged up and down to change the ordering in the Country Listing.

Manage Filters

To start this action, click the ☰ Manage Filters button above the Country listing in the ⋮ More Menu.

Creates custom Filters for Countries.

A Filter is a saved Advanced Search. Multiple Filters can be created for Countries.

These Filters appear at the top of the Country listing.

When the Filter is selected the results are restricted to only include those which match the Filter.

The Manage Filters action shows a list of existing Filters for Countries where these can be managed.

Country Field Reference

ISO Country Code

Two Letter Country CodeUsed for link to OCC provider

ISO Country Code 3

Three letter country code, may be required for OCC provider

ISO Numeric Code

Three digit numeric code, may be required for OCC provider

VAT Exclusion Mode

This field is mandatory.

The VAT exclusion criteria presented if an order is taken for delivery to this country

Requires Post Code

This country uses post codes, and post codes must be entered when creating an address in this country

VAT Name

The name for VAT in this country