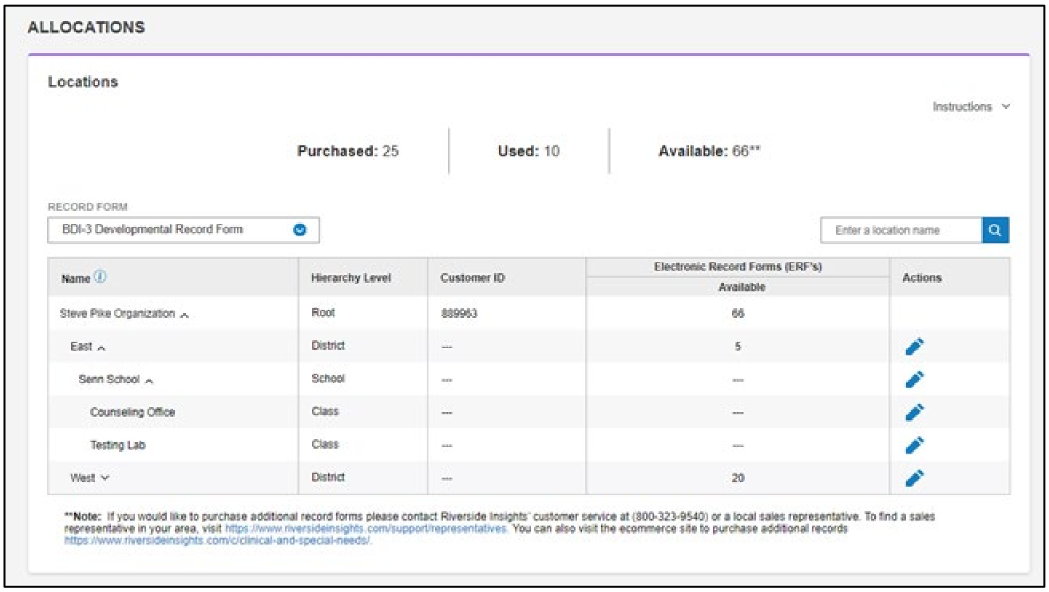
Quick Guide
Manage Allocations

The account holder and other staff members that have allocation privileges can allocate record form licenses to locations in the organization.

To open the Allocations page:

There are two ways to open the Allocations page:

- Click **Organization Management** on the menu and select **Allocations**.
- On the Organization tab of the Locations page, click the Allocations icon on the row for which you want to make allocations.



Allocations Page Detail

- **Purchased** – The number of record forms purchased by this organization.
- **Used** – Record forms at this level that have been administered and committed.
- **Available** – The number of record forms that are still available to be allocated.
- **Record Form** – Select the record form to allocate.
- **Enter a Location** – Type the name of a location and click the search icon to find it.

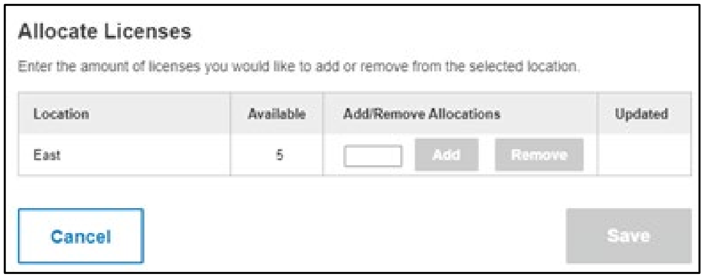
Columns

- **Name** – The name of the location. Use the arrows to expand and collapse the list.
- **Hierarchy Level** – The root and sub level for the location on this row.
- **Customer ID** – The ID only appears for the root level.
- **Electronic Record Forms (ERFs) / Available** – The number of record forms available for this location. In this example, the root level has allocated 5 records to the East district and 20 to the West.
- **Actions** – Click the Edit icon to allocate record form licenses.

Add and Remove Licenses

You can add licenses to locations and remove them.

1. Open the Allocations page.
   - On the **Organization Management** menu, select **Allocations**.
   - On the Organization tab of the Locations page, click the Allocations icon on the row of the location for which you want to make allocations.
2. If you did not open from the Locations page, find the location to which you want to make allocations.
   - In the Enter a Location box on the right, type part of the name and click the Search icon.
   - In the **Name** column on the left, click the down arrows to expand the list and find the location.
3. Click the Edit icon on the row of the location. The Allocate Licenses box opens.



To add licenses:

1. Type the number of licenses in the box under **Add/Remove Allocations**. The **Add** and **Remove** buttons are now active.
2. Click **Add**. The number under **Updated** appears. This is the number already available plus the license you just added. The **Save** button is now active.
3. Click **Save**. You return to the Allocations page. In the **Available** column, the number of licenses is added to the selected location.

To remove licenses:

1. Type the number of licenses in the box under **Add/Remove Allocations**. The **Add** and **Remove** buttons are now active.
2. Click **Remove**. The number under **Updated** appears. This is the number of removed licenses subtracted from the previously available. The **Save** button is now active.
3. Click **Save**. You return to the Allocations page. The number in the **Available** column is removed from the selected location.