



# OxeLead's New Location Feature & How to Set It Up

This PDF contains important information about OxeLead's new LOCATION feature and how to properly set it up in your account.

The primary purpose of locations is to allow large organizations to group and filter trainers, clients, workouts, and schedules by department, physical location, or other logic divisions within your organization to enable your workforce to focus on the people and content that are most pertinent to their roles.

Please refer to the outlined steps to properly setup the new LOCATIONS feature in your admin account.

\* Must have trainer license to access

<b>01</b>	<b>Go to ADMIN</b>
Sign in to your OxeLead account and select ADMIN on the left hand side to access your admin page.	
On this page, you will find a new LOCATIONS tab to select. If your organization has multiple locations, this is where you will create a new entry for each one. Click on this LOCATIONS tab to begin.	

<b>02</b>	<b>Add LOCATIONS</b>	
Select ADD LOCATION and enter a name and optional address information to create a new entry.		<p><b>NOTE:</b> Adding locations will enable OxeLead's new LOCATION FILTER to appear as a drop down menu across your screen. This feature is not visible until a location is added.</p> <p>You will use this new LOCATIONS FILTER to navigate OxeLead more easily by viewing only the content you need to see based on your location.</p> <p>When using the filter, there will be an additional NO LOCATIONS option to select. In later steps, you can use this filter option as a helpful tool to see which Users/Devices/Schedules still need to be assigned to a location.</p>
Repeat this until all locations have been added or if there are multiple admins, each admin can add their own location.		

<b>03</b>	<b>Assign DEVICES</b>
Select DEVICES from the admin page.	
A list of your organization's registered devices should be displayed.	
For each device, select the EDIT icon to assign/reassign it to the correct location.	

<b>04</b>	<b>Assign MEMBERS</b>	
Select MEMBERS from the admin page.		<p><b>NOTE:</b> If the member has any scheduled workouts, a LOCATION WIZARD will appear as an additional step to help you assign the member to a new location without losing their scheduled events. The location wizard will prompt you to assign each of the member's workouts to a location as well, and this is because each location now has their own separate schedule.</p> <p>If the user has multiple locations, be sure to assign each event to the correct location.</p> <p>The LOCATION WIZARD also gives you the option to cancel scheduled workouts when assigning a member to a location.</p> <p><b>NOTE:</b> If you MOVE a scheduled workout to a location that does not currently have that specific workout routine attached to it, the workout routine will automatically be added as a new entry in the WORKOUTS tab.</p>
A list of your organization's members should be displayed.		
For each member, select the EDIT icon to assign/reassign them to the desired location(s).		

<b>05</b>	<b>Attach WORKOUTS*</b>	
Select the WORKOUTS tab from the left hand side menu.		<p><b>NOTE:</b> Each workout can be assigned to a single location or multiple locations.</p>
A list of your previously created workouts should be displayed. All workouts needs to be assigned to a location.		
Click on each workout → Options → Assign Location.		

<b>06</b>	<b>Move SCHEDULES*</b>	
Select the SCHEDULE tab from the left hand side menu.		<p><b>NOTE:</b> Using the LOCATION WIZARD in Step 4 may have already assigned some/all of your scheduled workouts to a specific location SCHEDULE. If you don't see any of your scheduled workouts on the "No Location Schedule," it is likely that all of your scheduled workouts have already been re-assigned to the correct schedule. If this is the case, you can skip this step altogether.</p> <p><b>NOTE:</b> If you change the LOCATION of a scheduled event, any MEMBERS or WORKOUTS not currently attached to that location will end up being discarded from that scheduled workout once it's moved.</p>
With the new location feature, multiple locations will no longer have to share one SCHEDULE in OxeLead. Each location will have a separate SCHEDULE to more clearly reflect where events are taking place. This means that all scheduled workouts need to be assigned to a LOCATION.		
Scheduled workouts that were created before this new location feature will default to NO LOCATION and can be found by selecting this option from the LOCATION FILTER.		
From the NO LOCATION view, see if you have any scheduled workouts remaining on this SCHEDULE and choose a LOCATION for each one. This will move scheduled workouts from the "No Location Schedule" to the correct SCHEDULE that is specific to their location.		

<b>07</b>	<b>Toggle LOCATION</b>
After following the above steps, all information/entries should be tied to a LOCATION.	
Use the LOCATION FILTER to toggle your OxeLead view and see only the relevant information you need based on your selected LOCATION.	
Please enjoy the new locations feature. If you have further questions, please contact <a href="mailto:support@oxefit.com">support@oxefit.com</a> .	