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C3 Financial Region Maintenance

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Managing Regions

A Region is used to organize Branches into more manageable groups. Regional division is a decision to be made by the management team for the institution.

Accessing the Region Management Screen

At the top of the Branch Dashboard, click the Region tab, the second left tab on the administration menu bar, select the Region name in the Region listing at the top of the page.

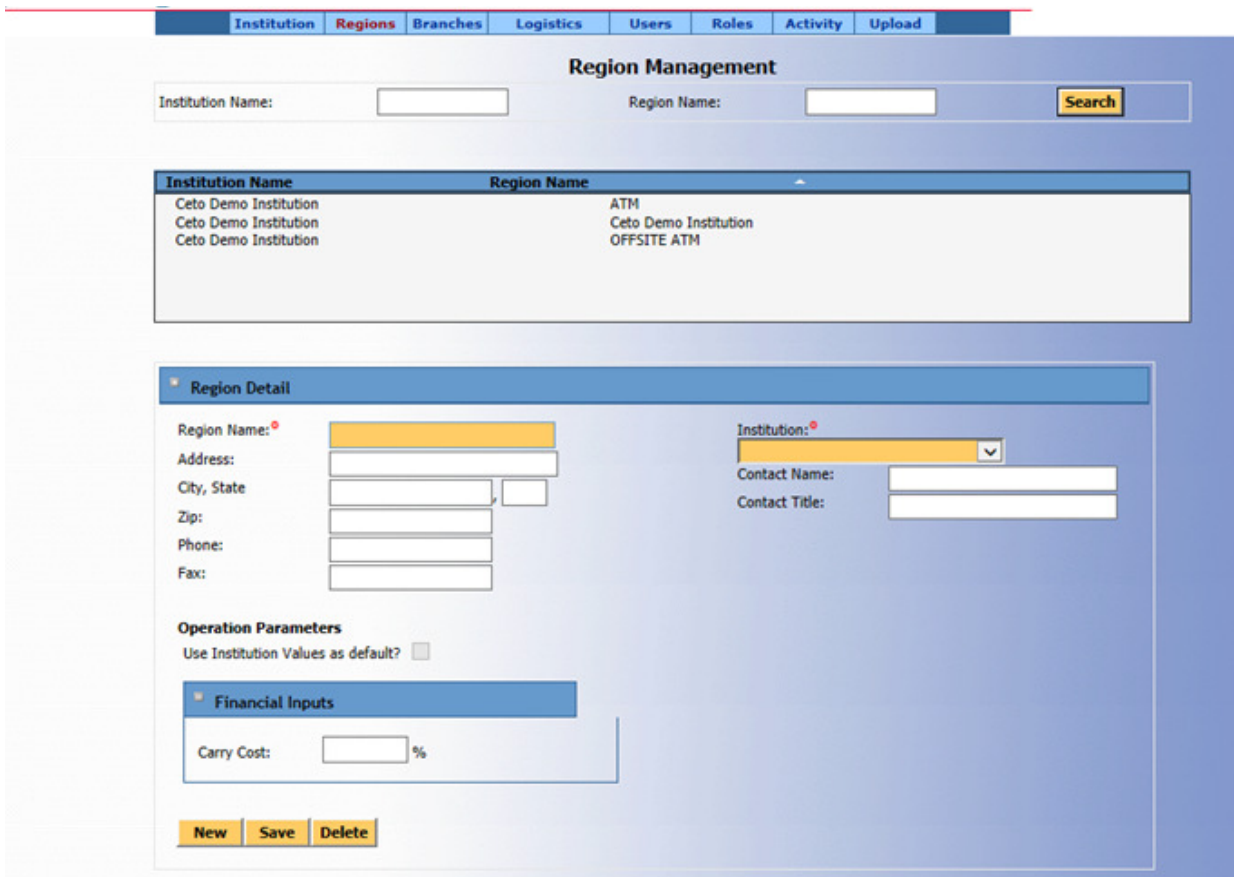
★ Regions are useful for large Institutions that have multiple managers overseeing specific areas.



From this screen you are able to add, edit, and delete Regions.

Adding Regions

Click the "New" button, at the bottom of the screen, to create a new Region.



Basic Region Information:

The Name of the Region and the Institution the Region belongs to are required to create a new Region. Please fill out as many details as possible for the Region. Fill in the appropriate Operation Parameters (Please see Institution Operation Parameters). If you would like your Institution's Operation Parameter Values to be applied to the Region, place a check in the "Use Institution Values as default?" box.

After these fields are populated, click "Save", at the bottom of the page, to add the Region to the Region listing.

★ Always click Save after completing an action!

Editing Regions

After editing the appropriate fields click the "Save" button at the bottom of the page.

Deleting Regions

If a Region no longer exists, it can be deleted. A deleted Region cannot be retrieved without technical assistance. Deleting should be done with great care. To delete a Region, select the Region to highlight from the Region listing and then click the "Delete" button. This displays a warning message asking if you are sure you want to delete. Click "OK" to confirm or "Cancel" to cancel the deletion.

