

Goad Portal Crib Sheet

Editing the selection table




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The selection table gives detailed information about outlets that are currently selected. Level 2/3 users are able to make changes to the values of editable fields.

Step 1 – Select outlet(s) and open the selection table

1. Using one or more of the selection tools, select the outlet(s) for which you want to view information in the selection table.
2. Click  in the **Tools** panel to the left of the plan to display the selection table.

Step 2 – Edit table fields

1. Double click on the row corresponding to the outlet you want to make changes for.
2. Edit the text for the individual field as required. You can use the special character # to specify the position of a carriage return. Any changes you make are automatically converted to upper case. You may only modify information contained within the following fields:
 - Fascia
 - Fascia Master
 - Secondary Activity
 - Category
 - Activity
 - Primary Activity
 - Holding Company
 - Use Class
3. Click **Update**.

Note: Changes made to the selection table will be apparent if you hover over a selected outlet to display the information for that outlet. However, any changes will be lost if you close the plan without saving it first.

Step 3 – Save the plan

1. Either

Click **Save Plan** in the **Save & Downloads** panel to the left of the plan to save the plan by overwriting the existing copy.

Or

Click **Save as Personal** in the **Save & Downloads** panel to the left of the plan to save the plan as a new personal plan version.

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