

Overview of Offices

Last Modified on 01/05/2022 11:03 am EST

Use the Offices module to set up your company's offices (whether distinguished as separate business entities or separate locations for a single agency). Each office record can have its own set of departments, team members, traffic managers, inventory bins, and report branding.

To create new offices, click the New button and enter information for the required fields (i.e. Office Name, Office Abbr, Tax ID, Address Title, Address Street, Address City, Postal Code).

The screenshot shows the 'Office: aACME, Inc. (AI)' record in the aACE software. The interface includes a header with 'Record: 1 of 1' and action buttons (New, Edit, Delete, Print, Actions). The record is marked as 'ACTIVE'. The main content area is divided into several sections:

- General Info (1):** Fields for Tax ID (555555) and AvaTax Co Code.
- Company (2):** Field for Company Name (aACME, Inc.).
- Office Info (3):** Fields for Address Title (aACME, Inc.), Address (1238 Broadway), City (New York), State/Prov (NY), Postal Code (10001), Country (United States), and Postal Format (American).
- Payment Address (4):** Fields for Payment Title (aACME, Inc.), Address (1238 Broadway), City (New York), State/Prov (NY), Postal Code (10001), Country (United States), and Postal Format (American). A 'Use Office Info' flag is present.
- Contact Info (5):** Fields for Phone ((555) 418-9777), Alt Phone, Fax ((555) 418-9778), Phone/Fax Format ((###) ###-####), Email (info@aacme.com), and Web Address (www.aacme.com).
- Departments (6):** A table with columns: Department Name, Abbr, Type, Start Time, End Time, Traffic Manager, Default Job, and Status.

Department Name	Abbr	Type	Start Time	End Time	Traffic Manager	Default Job	Status
aACME, Inc.	AI	OFFICE	9:00 AM	5:00 PM			●
Accounts Payable	AI-A/P	A/P	9:00 AM	5:00 PM			●
Accounts Receivable	AI-A/R	A/R	9:00 AM	5:00 PM			●
Fulfillment	AI-FFMT	FFMT	9:00 AM	5:00 PM			●
Sales	AI-Sales	SALES	9:00 AM	5:00 PM			●

- General Info** – Records the office's Tax ID number; also the AvaTax company code, for aACE+ AvaTax customers.
- Company** – Links to the Company record associated with this office.
- Office Info** – Contains the office's primary address. Click the Location icon (📍) to open a web browser and see the address in Google Maps.
- Payment Address** - Contains the address where payments to the office are received. You can copy the data from the Office Info section by marking the Use Office Info flag.
- Contact Info** – Contains phone, fax, email, and web contact information for the office, as well as formatting conventions for those fields.
- Departments / Team Members / Inventory Bins / Reporting** – On these tabs, you can create departments within the office, view team members assigned to the office, create inventory bins for it, and upload office-specific report branding.
Note: When team members log in to aACE, their office assignment is noted by the office

initials at the bottom of the main menu. If the correct preferences are set in the User Groups module, users assigned to multiple offices can quickly switch views by clicking the office initials on the main menu and selecting a different office. When a team member creates an order record, only the line item codes that are associated with the same office will be visible for selection.
