Setting Up Departments

Last Modified on 08/24/2020 4:42 pm EDT

The Departments module allows system administrators to work with existing department records. However, to create a new department, you must edit the relevant *office* record. This helps ensure that offices and departments are always connected.

- 1. Navigate to Menu > Internal > Offices.
- 2. Locate the desired office and at the detail view, click Edit.
- 3. Scroll down to the Departments sub-tab, then enter the new department title. The remaining fields become active.

Office: aACME Education Solutions, Inc.										AI ACTIVE					
Office Details	лю, <u>та</u> , та.				anche Luuca		, inc.			(333) 110 3777		Notices 🔒	Emails		1 Doc 🥝
Address					Address					Fax	one / Fax Format				
238 Broadway					1238 Broadway					(555) 418-9778			(###) ###-####		
										Email					
										info@aacme.co	m				\sim
City			Postal Code	City		State / Prov			Web Address						
lew York	NY	NY 11221			New York		NY	11221		www.aacme.co	www.aacme.com				
Country Postal Format			Country			Postal Format			Email Format (using "John Q Public") 😮						
Inited States American				United States			American			john.public@aacme.com					
aACME, Inc.		Ab		Typ OF	e FICE	Start Time 9:00 AM	End Time 5:00 PM			Traffic Manager 🔍	Q	Default Job		Statu	is 🔒 ^
Accounts Pavable		AI		A/P		9:00 AM		5:00 PM		Denise James	Q	-			7
Accounts Receivable			-A/R	A/R		9:00 AM		5:00 PM	>	Alexis Kohn	Q				7
Development			-Dev	. yı	•	9:00 AM		5:00 PM			Q				7
Fulfillment			-FFMT	FFN	1T	9:00 AM	5	5:00 PM	>	Ned Walker	Q				7
Quality Assurance		► AI	-QA			9:00 AM	5	5:00 PM	>	Allen Wright	Q,		(2	The second secon
Sales		► AI	-Sales	SAL	.ES	9:00 AM	5	5:00 PM	>	Mara Harvey	Q		(۹ ا	- The
Shipping		► AI	-Shipping	SHIPPING		9:00 AM	5	5:00 PM	>	Kristie Hernandez	Q		(۹ ا	Tr.
	×	+				9:00 AM	5	5:00 PM			Q		(۹ 🜔	л.
Customer Service															

- 4. Enter the remaining department information:
 - A. Abbr Enter a recognizable abbreviation (e.g. "NY-A/P" could represent New York Office of Accounts Payable).
 - B. Type Select the appropriate department type (see below for details).
 - C. Start Time & End Time Specify the department's hours of operation. Note: These settings affect other system logic that calculates completion times for task and job assignments.
 - D. Traffic Manager Specify the person in charge of managing the traffic for this department. New records will be automatically assigned to this person. (This may be affected by the Type setting.)
 - E. Default Job Specify the default job record. This will automatically be set as the assigned job for new records of the related Type.

Note: For in-depth details specific to your workflows, discuss this concept with your system administrator.

5. Click Save.

Department Types

The value list in the Type field has built-in logic. It determines which designated traffic manager (TM) will be automatically assigned to various records. The default department types are:

- A/P (Accounts Payable) TM auto-assigned all purchase orders and purchases.
- A/R (Accounts Receivable) TM auto-assigned all invoices.
- FFMT (Fulfillment) TM auto-assigned all job records.
- OFFICE This department is automatically assigned to users who click the Main Menu link to switch offices. Only one department can be assigned this Type.
- Sales TM auto-assigned all lead records.
- Shipping TM auto-assigned all shipping records.

Users can manually over-ride the automatic record assignment when they create a record. The system administrator can also add new department types by clicking the Type field, selecting Edit, entering the new type, then clicking OK.