Setting Up Departments

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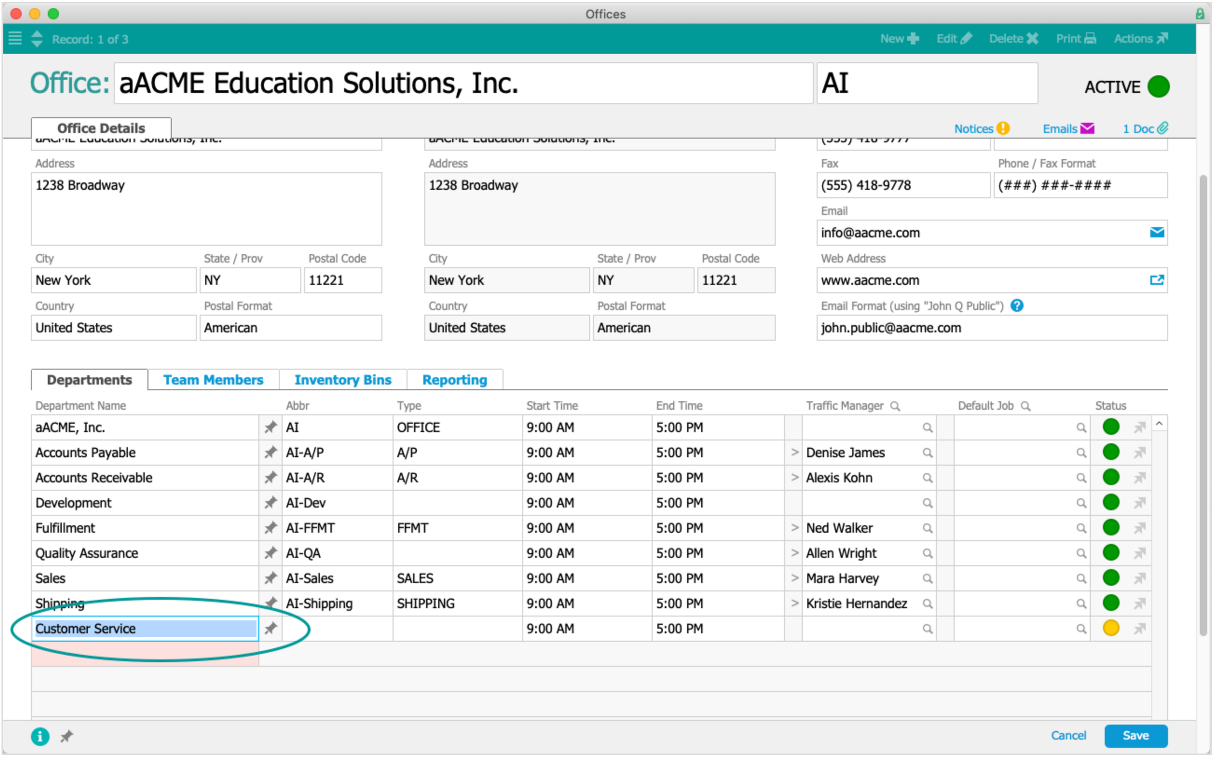
The Departments module allows system administrators to work with existing department records. However, to create a new department, you must edit the relevant *office* record. This helps ensure that offices and departments are always connected.

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.



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.