

## **DEPARTMENTS**

## SET UP

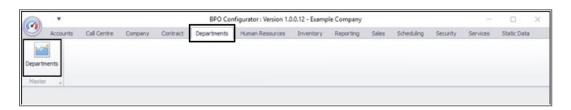
A **department** must be set up in order to link invoice items to a specific department, e.g. **Sales**. If a **site** is selected, then the department will pull through on the Sales Order and Sales Invoice item lines automatically. If you have more than one department, you <u>must</u> select the relevant department for each line.

Departments need to set up to categorise **Contracts**.

If you have a segmented ledger and post general ledger entries based on **departments**, you need to ensure that Sales Orders, Sales Invoices, Contracts and Employees are **linked** to a department.

An **employee** can only be linked to <u>one</u> department type but can be linked to that department type in more than one site.

**Ribbon Access:** Configurator > Departments > Departments



The **Departments** screen will be displayed. This screen is divided into **two** frames:

- i. Sites
- ii. Department Associations

Department Associations will be addressed further on in this manual.



#### **SITES FRAME**

The *Sites* frame lists <u>all</u> the sites linked to this company.

Note: Each site has an *expand* button in front of it. If this button is *bold*, that shows us that there are already departments linked to this site. If the expand button is *faint* then that particular site has no linked departments.

In this image you can see that *Durban* and *Pretoria* have *linked* Departments (*bold* expand button) and *Cape Town* and *Johannesburg* do <u>not</u> have any linked departments (*faint* expand buttons).

- Click on the *expand* button in front of one of the *sites*.
  - In this image *Durban* has been selected.



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## **DEPARTMENTS FRAME**

- The *Departments* frame for this site will be *expanded*.
- Here you can view a list of all the *departments* currently *linked* to this site.
- In this image, there is a
  - Sales
  - Technical and
  - Development

department currently linked to the Durban site.



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## ADD A DEPARTMENT

- Click in the *final row* of the *Departments* frame. This row will now be *'activated'* and you can now type in the *new* department details.
  - **DEPTDepartment:** Type in the *code* for this new department.
  - **DEPTDepartment Description:** Type in a *description* for this new department.
  - **Status:** This will auto populate with **A** Active.
    - (You will note that the *Associations* frame has populated with an *Item Type* data grid and the frame *title* has changed to *New Department... Associations* as you clicked on the new row. This will be addressed further on in the manual).



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• When you have finished entering the new department details, either press *Tab* or *Enter* on your keyboard.



- A *Confirmation* message box will pop up asking;
  - Are you sure you want to save changes to this department?
- Click on Yes.



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• As you click on Yes, a *new row* will be created in the currently open *Departments* data grid.



- A *Select the applicable items* screen will pop up.
- Here you can click on the *check box(es)* to *link* this new department to *any* or *all* of the *site(s)* listed in this screen.

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- In this image, a site that *already* contains departments (Durban) has been selected as well as a site that has *no* departments linked to it (Johannesburg).
  - Note: Until this point, Johannesburg had a *faint* expand icon - indicating *no* linked departments.
- When you have made your site selection(s), click on *Accept*.



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- The new department details will be *saved* in the selected sites.
- The new row will now be *'activated'* in the open Durban Departments data grid.
- You will note that Johannesburg now has a *bold* expand button.
   Click on this button.

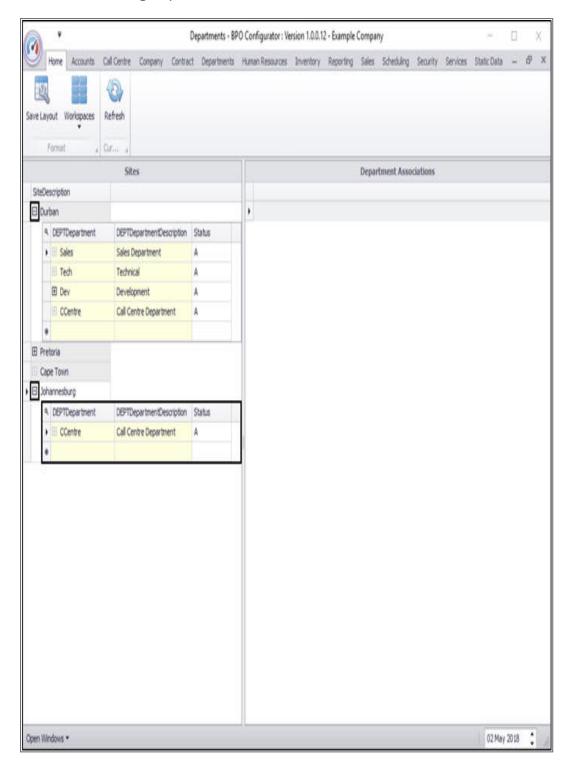


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• The Johannesburg Departments frame will be *expanded*. Here you can view the newly added department details.



• **Collapse** all the open Department frames when you have finished adding departments.





## **VIEW DEPARTMENT ASSOCIATIONS**

- In the *Departments* screen, select a *site* by clicking on the *expand* button in front of that site.
  - In this image, *Durban* has been selected.

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- The *Departments* frame for Durban will be expanded.
- *Click anywhere* in the *row* of the *department* that you wish to *view* the associations of.



• In this image, the *Sales Department* has been selected

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- The *Department Associations* frame will now populate with all the associations linked to this department.
  - Note: You will see that the *title* of the frame has changed to *Sales* Department Associations. If the *Technical* Department had been initially selected, the title would have changed to *Technical* Associations.

#### ADD AN ASSOCIATION

• Click in the *Item Type* text box in the *final row* of the *Asso-ciations* data grid.



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E Dev		Development	Á	EMPL	Employee	MUD001	Judith Mudzengi	
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E Pretoria				EMPL	Employee	306001	Joel James	
Cape Town				EMPL	Employee	MIL001	Abigal Mine	
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				CUST	Customer	THE0001	The Very Interesting Shop of Goodies	
				CUST	Customer	APP0001	Apple Juice Inc	
				CUST	Customer	GRE0002	Great New Customer	
				CUST	Customer	NET001	Networking and Laptops	
				CUST	Customer	CO30001	CO3 Test Co.	
				CUST	Customer	STA001	Stan and Lopez	
				CUST	Customer	IT50001	IT Supples	
				CUST	Customer	GD80001	Good Books	
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• A *drop-down arrow* will be revealed. Click on this arrow to display the *Item Type* menu.



• Click on the *Item Type* that you wish to *associate* with this department.

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Johannesburg			EMPL.	Employee	DUT002	Tammy Du Toit	
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			CUST	Customer	G080001	Good Books	
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			CUST EMPL	Customer Employee			
			FNLC	Functional Location			
			INVN PROJ	Inventory Item Project			
			WKOR	Work Order			
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• In this image, *Employee* has been selected.



- The *Item Type* and *Item Description* text boxes will now populate with the selected details.
- Click in the *Item Code* text box.

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E Tech	Technical	A	CUST	Customer	YES001	Young Electric	
E Dev	Development	A	EMPL	Employee	MUD001	Judith Mudzengi	
E CCentre	Call Centre Department	A	EMPL	Employee	TIM	Joseph Timber	
•			EMPL	Employee	E987654	Jeff Rivers	
E Pretoria			EMPL	Employee	JCE001	Joel James	
Cape Town			EMPL	Employee	M0L001	Abigal Mine	
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			CUST	Customer	APP0001	Apple Juice Inc	
			CUST	Customer	GRE0002	Great New Customer	
			CUST	Customer	NET001	Networking and Laptops	
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			CUST	Customer	STA001	Stan and Lopez	
			CUST	Customer	IT\$0001	IT Supples	
			CUST	Customer	GD80001	Good Books	
			I BAPL	<ul> <li>Employee</li> </ul>	1		



- An *ellipsis* button will be revealed.
- Click on this button to display the *Select the associated employee* pop up screen.
  - Note: This pop up screen will *change* according to your initial Item Type selection. If, for example, you selected *Asset*, then the correlating pop up screen would be *Select the related asset*.



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- Click on the *row selector* in front of the *employee* that you wish to *link* to this department.
- Click on Ok.



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Home Acco	unts Call C	Centre Compo	any Contract Depu	artments. Hun	an Resou	rces Invento	ry Reporting	Sales S	cheduling Security Services Static Data	- 8	į
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									Judith Mudzengi		
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TWA001			Jonothan-Mark Tw		1	Beinda Sha	Tech	Technical	Tammy Du Toit		
STE001			Markus Anilus Stev		M	Jonothan		0	The Very Interesting Shop of Goodles		
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E987654	Jeff	Rivers	Jeff Rivers		1		Sales	Sales Der			
306001	Joel	James	Joel James		33	Banca Du		Sales Der			
MIL001	Abigal	Mine	Abigal Mine		A		Sales	Sales Dec			
DUT001	Test	Employee	Test Employee		T			0			
DUT001	Mary	Saunders	Mary Saunders		M			0			
DUT002	Tammy	Du Tolt	Tammy Du Toit		T		Sales	Sales Des .			
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• The selected employee details will now populate the *Item Code* and *Item Name* text boxes.



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El Durban			CUST	Customer	CU5001	Cash Sales Account	
9. DEPTDepartment	DEPTDepartmentDescription	Status	EMPL	Employee	HAR001	Chris Haynes Attendee	
<ul> <li>Bales</li> </ul>	Sales Department	A	BVPL	Employee	BAL001	Susan Cooper	
I Tech	Technical	A	CUST	Customer	YES001	Young Electric	
E Dev	Development	A	EMPL	Employee	MUD001	Judith Mudzengi	
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a course		^	EMPL	Employee	E987654	Jeff Rivers	
E Pretoria			BMPL.	Employee	JOE001	Joel James	
Cape Town			EMPL	Employee	MIL.001	Abigail Mine	
E Johannesburg			EMPL	Employee	DUT002	Tammy Du Toit	
			CUST	Customer	THE0001	The Very Interesting Shop of Goodles	
			CUST	Customer	APP0001	Apple Juice Inc	
			CUST	Customer	GRE0002	Great New Customer	
			CUST	Customer	NET001	Networking and Laptops	
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			I EMPL	Employee	BEN	Ben Johnson ····	

- Press **Tab** or **Enter** on you keyboard.
- An *Update* message box will appear asking;



# • Are you sure you want to save the changes to this association?

• Click on Yes.

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	9. DEPTDepartment	DEPTDepartmentDescription	Status	EMPL	Employee	HAR001	Chris Haynes Attendee	
	) El Sales	Sales Department	A	EMPL.	Employee	BAL001	Susan Cooper	
	🗉 Tech	Technical	A	CUST	Customer	YES001	Young Electric	
	E Dev	Development	A	BMPL	Employee	MUD001	Judith Mudzengi	
	CCentre	Call Centre Department	A	EMPL	Employee	TIM	Joseph Timber	
				BMPL	Employee	ED01	Ed Jones	
Ð	Pretoria			EMPL	Employee	JAD01	Jade Rivers	
	Cape Town			BMPL	Employee	E987654	Jeff Rivers	
Ð	Johannesburg			EMPL	Employee	30E001	Joel James	
				EMPL.	Employee	MIL001	Abigal Mine	
				EMPL	Employee	DUT002	Tammy Du Toit	
				CUST	Customer	THE0001	The Very Interesting Shop of Goodies	
	Updat	e		Х	Customer	APP0001	Apple Juice Inc	
					Customer	GRE0002	Great New Customer	
				the descent set	Customer	NET001	Networking and Laptops	
		Are you sure you want to	save changes to tr	his Association?	Customer	CO30001	CO3 Test Co.	
					Customer	STA001	Stan and Lopez	
		jes	No	Cancel	Customer	1750001	IT Supplies	
		10	Цч	Saure	Customer	G080001	Good Books	
				I EMPL	Employee	BEN	Ben Johnson	



The details will be *saved* and a *new row* will be created in the *Associations* data grid.

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	urban			CUST	Customer	CU5001	Cash Sales Account		
	9. DEPTDepartment	DEPTDepartmentDescription	Status	EMPL	Employee	HAR001	Chris Haynes Attendee		
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	E Dev	Development	A	EMPL	Employee	MUD001	Judith Mudzengi		
	CCentre	Call Centre Department	A	EMPL	Employee	TIM	Joseph Timber		
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a G	retoria	1		EMPL	Employee	JAD01	Jade Rivers		
	ape Town			EMPL	Employee	E987654	Jeff Rivers		
	ohannesburg			EMPL	Employee	306001	Joel James		
				EMPL	Employee	MIL001	Abigal Mine		
				EMPL	Employee	DUT002	Tammy Du Tolt		
				CUST	Customer	THE0001	The Very Interesting Shop of Goodes		
				CUST	Customer	APP0001	Apple Juice Inc		
				CUST	Customer	GRE0002	Great New Customer		
				CUST	Customer	NET001	Networking and Laptops		
				CUST	Customer	CO30001	CO3 Test Co.		
				CUST	Customer	STA001	Stan and Lopez		
				CUST	Customer	IT50001	IT Supples		
				CUST	Customer	GD80001	Good Books		
				BMPL	Employee	BEN	Ben Johnson		
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#### Note about Sub-Departments

- In the *Durban Departments* data grid, you will note that one of the departments; *Development*, has an *active /bold* expand button in front of it.
- This indicates that there is <u>one or more</u> linked *sub-departments*.
- Click on this *expand* button.



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E Tech	Technical	A	CUST	Customer	YE5001	Young Bectric	
Dev	Development	A	EMPL	Employee	MJD001	Judith Mudzengi	
CCentre	Call Centre Department	A	EMPL	Employee	TIM	Joseph Timber	
			EMPL	Employee	ED01	Ed Jones	
El Pretoria	1		EMPL.	Employee	JAD01	Jade Rivers	
Cape Town			EMPL	Employee	E987654	Jeff Rivers	
E Johannesburg			EMPL.	Employee	30E001	Joel James	
			EMPL	Employee	MIL001	Abigal Mine	
			EMPL.	Employee	DUT002	Tammy Du Toit	
			CUST	Customer	THE0001	The Very Interesting Shop of Goodes	
			CUST	Customer	APP0001	Apple Juice Inc	
			CUST	Customer	GRE0002	Great New Customer	
			CUST	Customer	NET001	Networking and Laptops	
			CUST	Customer	CO30001	CO3 Test Co.	
			CUST	Customer	STA001	Stan and Lopez	
			CUST	Customer	IT50001	IT Supples	
			CUST	Customer	G080001	Good Books	
			BIPL	Employee	SEN	Ben Johnson	
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- The *Development Department* frame will be expanded.
- Here you can view two linked *sub-departments:*

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- Coding and
- Documentation.
  - Note: As you clicked on the Development Department expand button the Associations screen *title* and *data grid content* changed to the correlating *Development* Associations.
- In this image, *no* associations have been added to this department yet.

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Sites     Development Associations       B Dorban     ItemType ItemTypeOtex     ItemCode     ItemTane	teDescription   Durban		ormat	0							1000 BB (1000 BC		 _	_
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Image: Pretoria       Image: Pretoria	Dev       Development       A         4       fdDEPTDepartment       fdDEPTDepartmentDescription         4       CODE       Coding       A         0       Documenting       A         0       Documenting       A         0       Centre       Call Centre Department         Pretoria       Cape Town       Cape Town													
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Cape Town	Cape Town	•												
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		] Joh	arnes	burg										

- *Click anywhere* in the *row* of one of the *sub folders*.
  - In this image, *Coding* has been selected.

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- You will see that as you clicked on the Coding Department row, the Associations frame *title* and *data grid content* changes to the correlating *Coding* Associations.
  - In this image, *no* associations have been added to this department yet.



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When you have finished working in the *Departments* screen, *collapse* the open data grids and *close* the screen



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