

DEPARTMENTS

SET UP

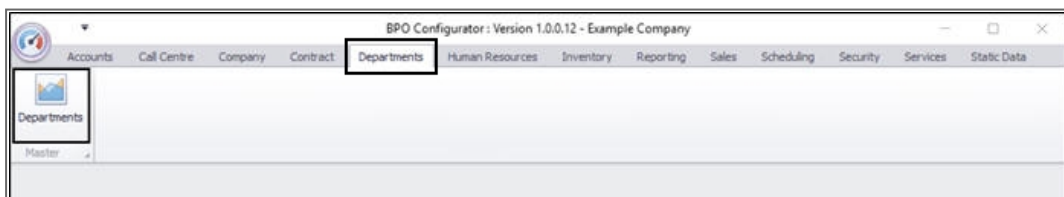
A **department** must be set up in order to link invoice items to a specific department, e.g. **Sales**. If a **site** is selected, then the department will pull through on the Sales Order and Sales Invoice item lines automatically. If you have more than one department, you must select the relevant department 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 one 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 all 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 not 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.

Departments - BPO Configurator : Version 1.0.0.12 - Example Company

Home Accounts Call Centre Company Contract Departments Human Resources Inventory Reporting Sales Scheduling Security Services Static Data

Save Layout Workspaces Refresh

Format Cur...

Sites	Department Associations
SiteDescription	
<input checked="" type="checkbox"/> Durban	
<input type="checkbox"/> Pretoria	
<input type="checkbox"/> Cape Town	
<input type="checkbox"/> Johannesburg	

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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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Home Accounts Call Centre Company Contract Departments Human Resources Inventory Reporting Sales Scheduling Security Services Static Data

Save Layout Workspaces Refresh

Format Cur...

Sites		Department Associations													
SiteDescription															
<div> <div>Durban</div> <table border="1"> <thead> <tr> <th>DEPTDepartment</th> <th>DEPTDepartmentDescription</th> <th>Status</th> </tr> </thead> <tbody> <tr> <td>Sales</td> <td>Sales Department</td> <td>A</td> </tr> <tr> <td>Tech</td> <td>Technical</td> <td>A</td> </tr> <tr> <td>Dev</td> <td>Development</td> <td>A</td> </tr> </tbody> </table> </div>	DEPTDepartment	DEPTDepartmentDescription	Status	Sales	Sales Department	A	Tech	Technical	A	Dev	Development	A			
DEPTDepartment	DEPTDepartmentDescription	Status													
Sales	Sales Department	A													
Tech	Technical	A													
Dev	Development	A													
Pretoria															
Cape Town															
Johannesburg															

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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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Save Layout Workspaces Refresh

Format Cur...

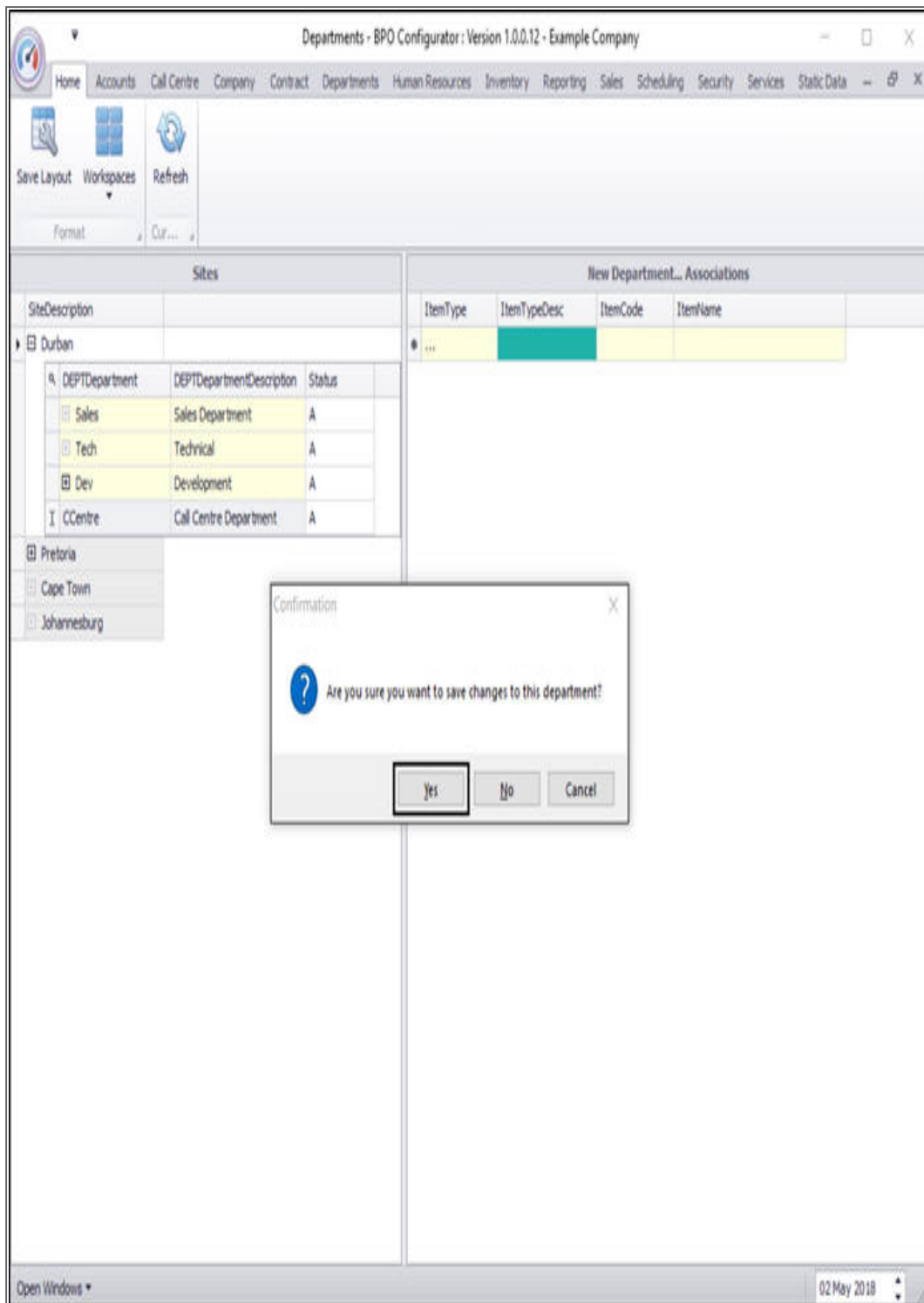
Sites			New Department... Associations																		
SiteDescription			ItemType	ItemTypeDesc	ItemCode	ItemName															
<div> <div>Durban</div> <table border="1"> <thead> <tr> <th>DEPTDepartment</th> <th>DEPTDepartmentDescription</th> <th>Status</th> </tr> </thead> <tbody> <tr> <td>Sales</td> <td>Sales Department</td> <td>A</td> </tr> <tr> <td>Tech</td> <td>Techrical</td> <td>A</td> </tr> <tr> <td>Dev</td> <td>Development</td> <td>A</td> </tr> <tr> <td></td> <td></td> <td></td> </tr> </tbody> </table> </div> <div> <div>Pretoria</div> <div>Cape Town</div> <div>Johannesburg</div> </div>	DEPTDepartment	DEPTDepartmentDescription	Status	Sales	Sales Department	A	Tech	Techrical	A	Dev	Development	A						...			
DEPTDepartment	DEPTDepartmentDescription	Status																			
Sales	Sales Department	A																			
Tech	Techrical	A																			
Dev	Development	A																			

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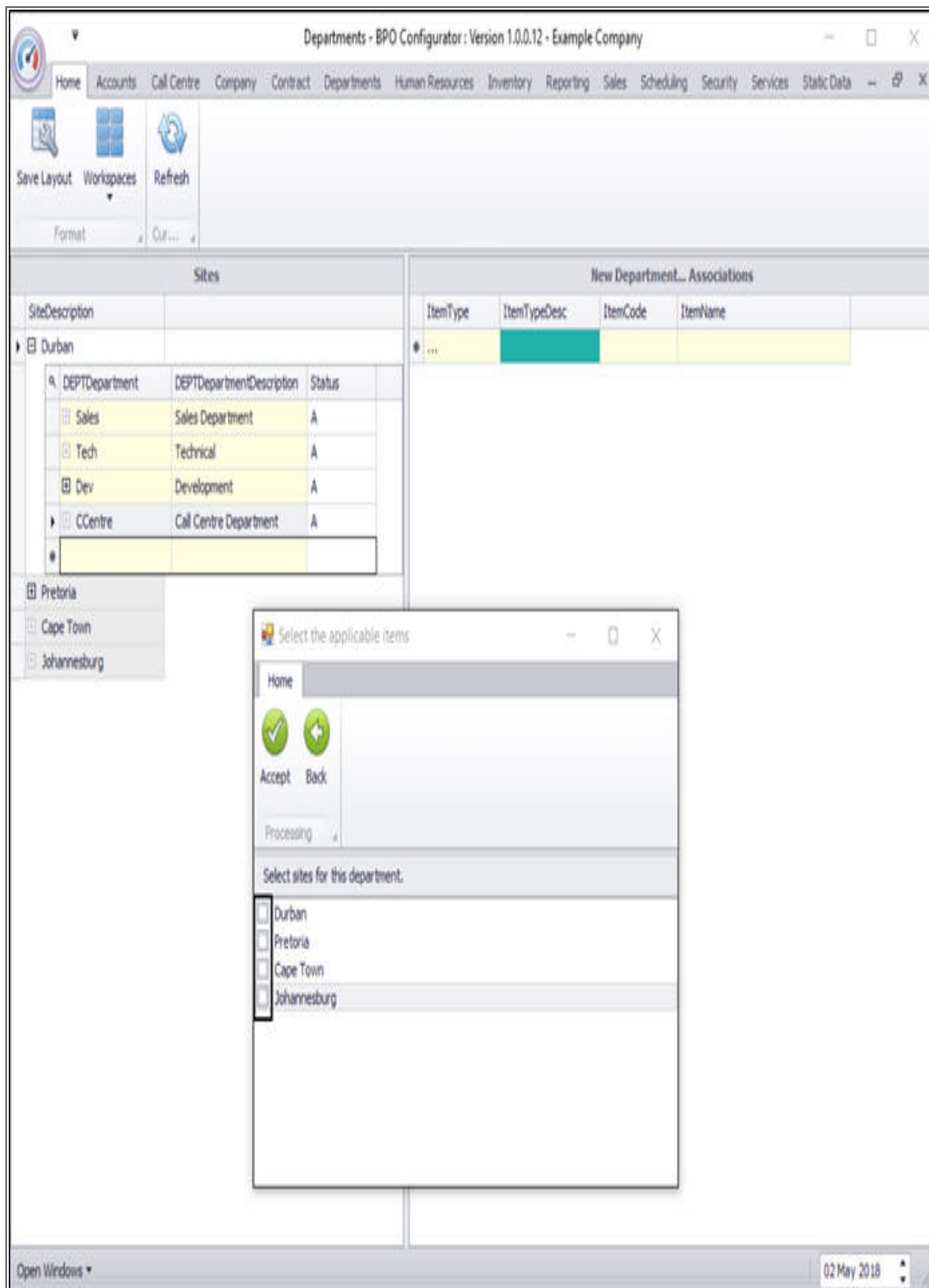
- When you have finished entering the new department details, either press **Tab** or **Enter** on your keyboard.

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

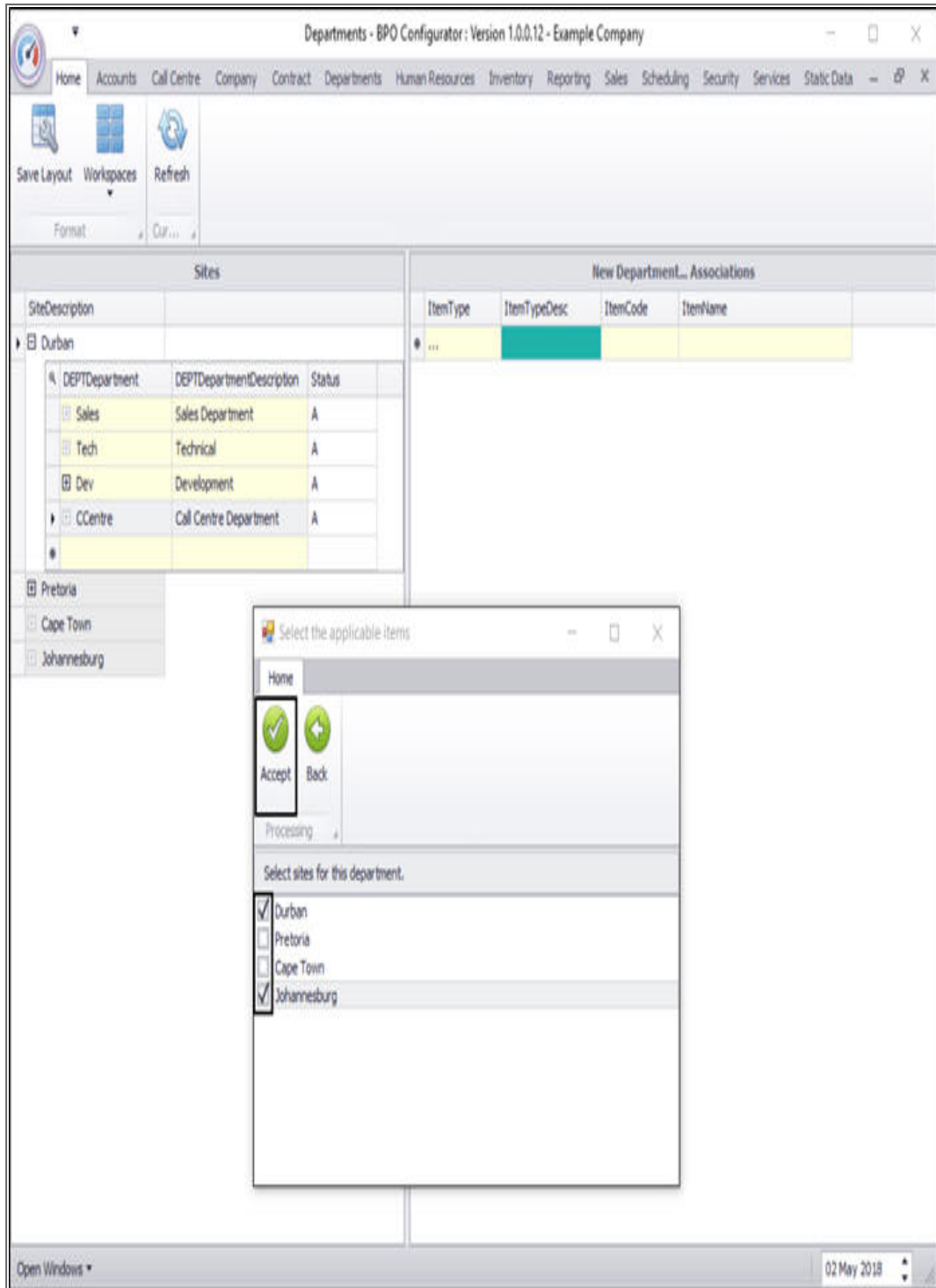


- As you click on Yes, a **new row** will be created in the currently open **Departments** data grid.

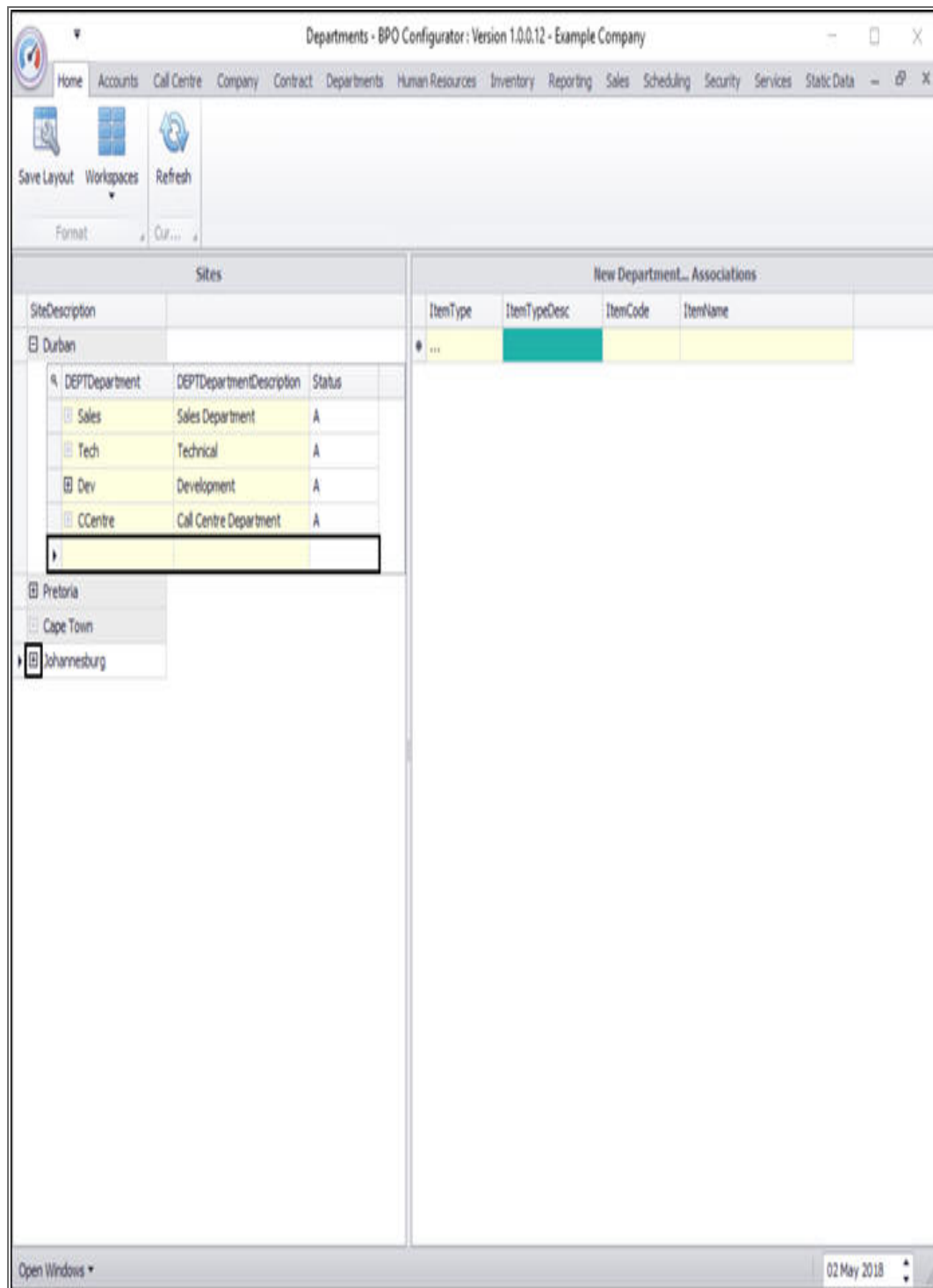
- A **Select the applicable items** screen will pop up.
- Here you can click on the **check box(es)** to **link** this new department to **any** or **all** of the **site(s)** listed in this screen.



- 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**.

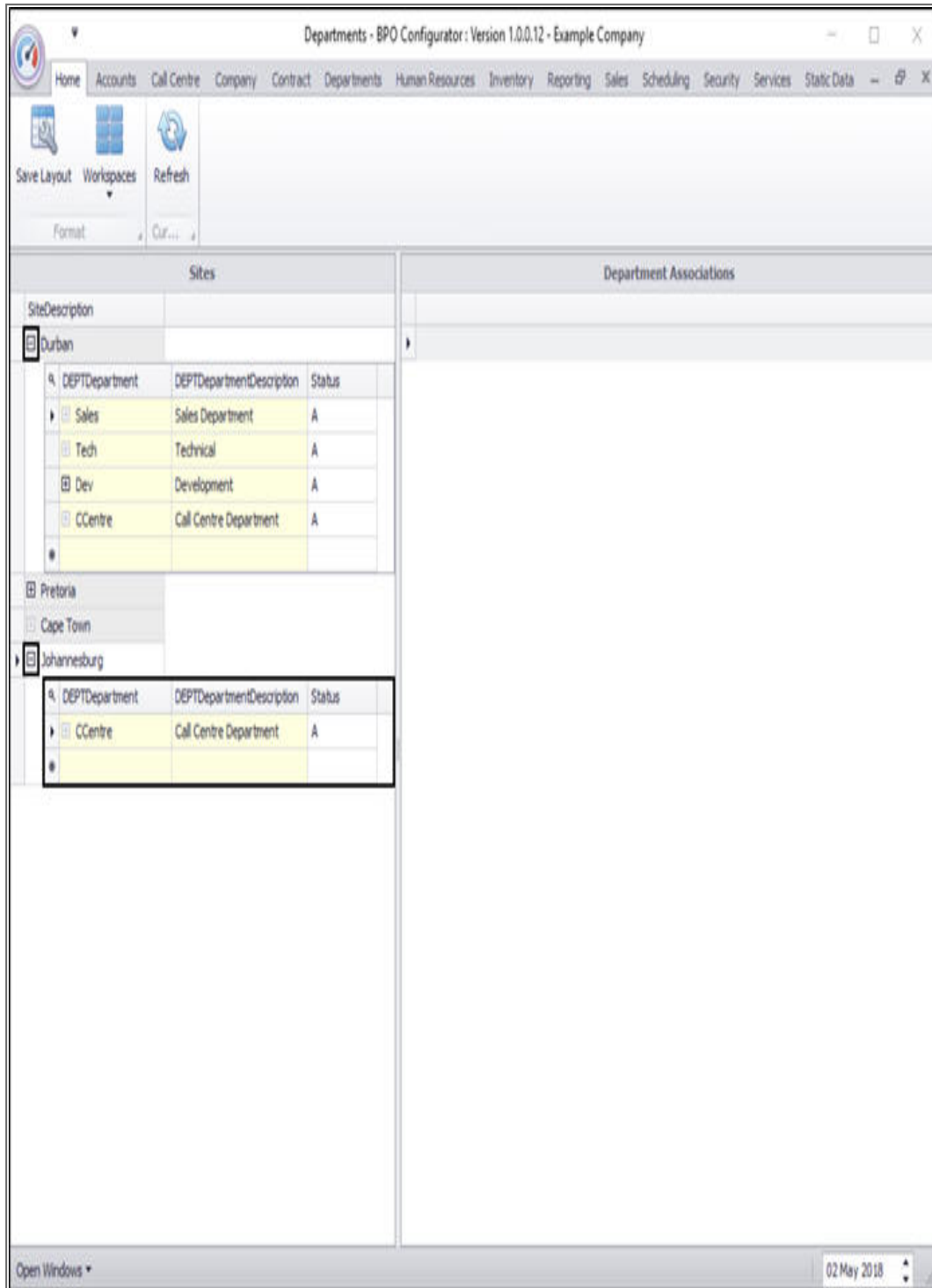


- The new department details will be ***saved*** in the selected sites.
- The new row will now be '***activated***' in the open Durban Departments data grid.
- You will note that Johannesburg now has a ***bold*** expand button. Click on this button.



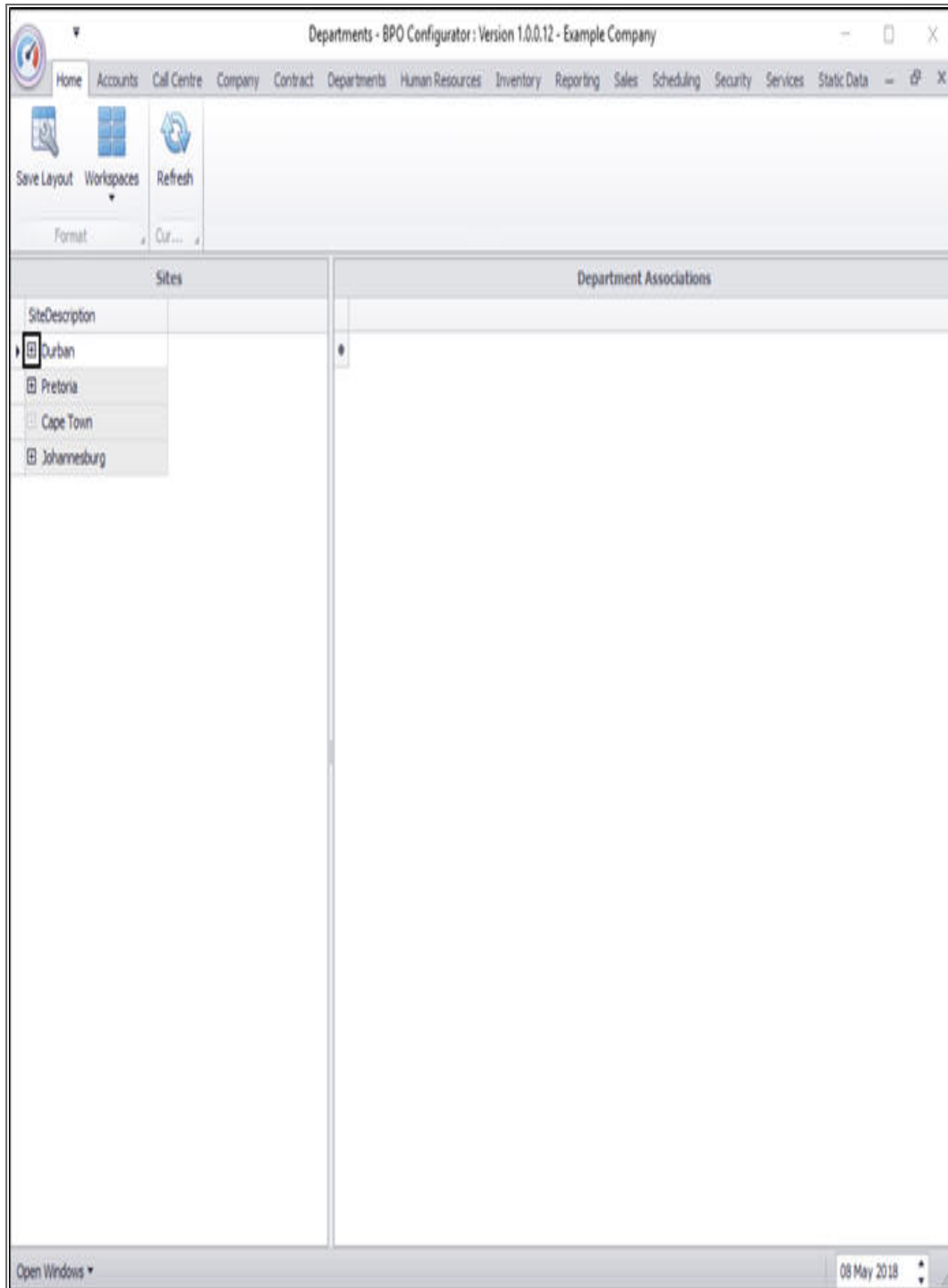
- The Johannesburg Departments frame will be **expanded**. Here you can view the newly added department details.

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



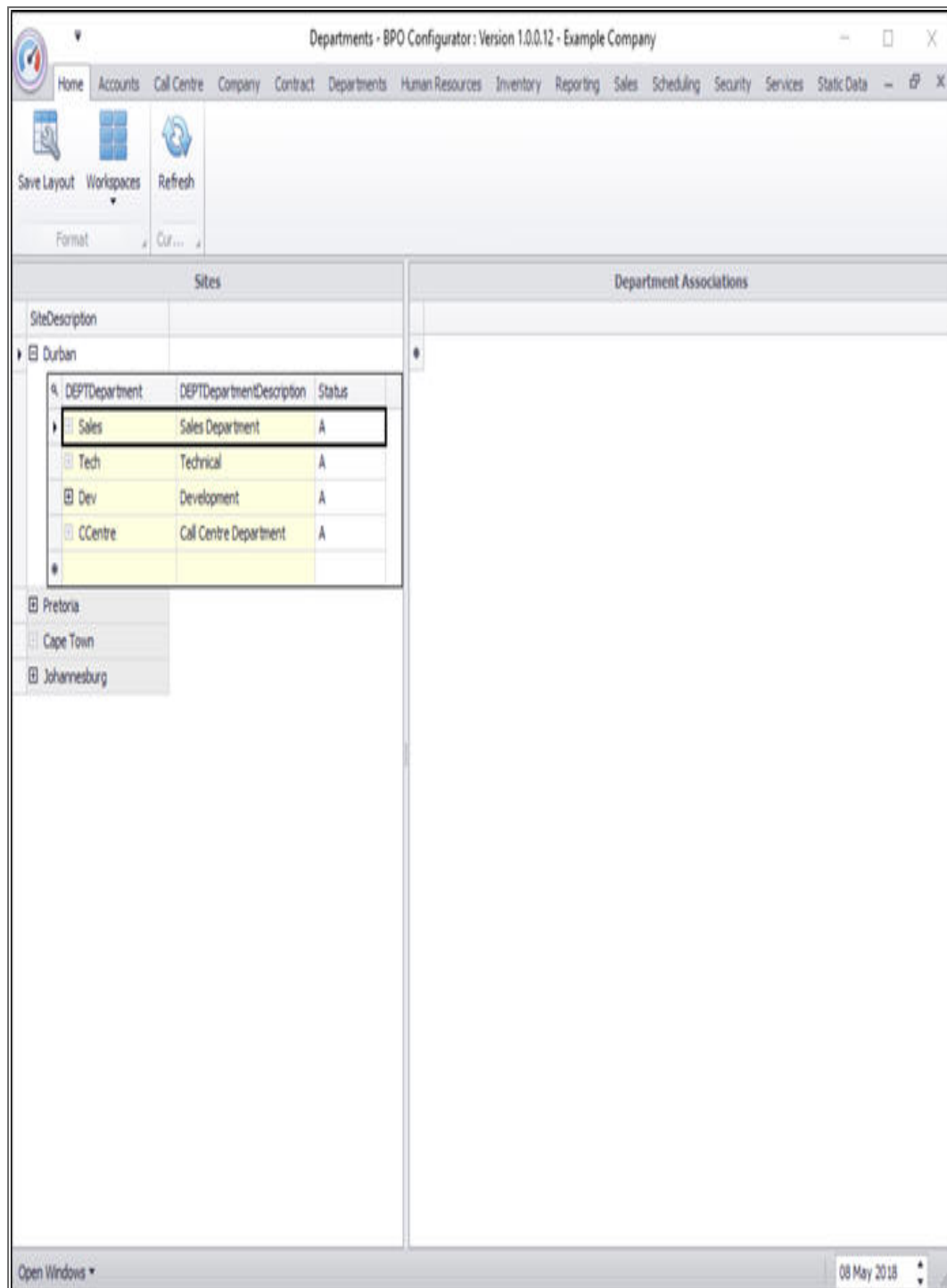
VIEW DEPARTMENT ASSOCIATIONS

- 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.



- 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



- 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 ***Associations*** data grid.

Departments - BPO Configurator : Version 1.0.0.12 - Example Company

Home Accounts Call Centre Company Contract Departments Human Resources Inventory Reporting Sales Scheduling Security Services Static Data

Save Layout Workspaces Refresh

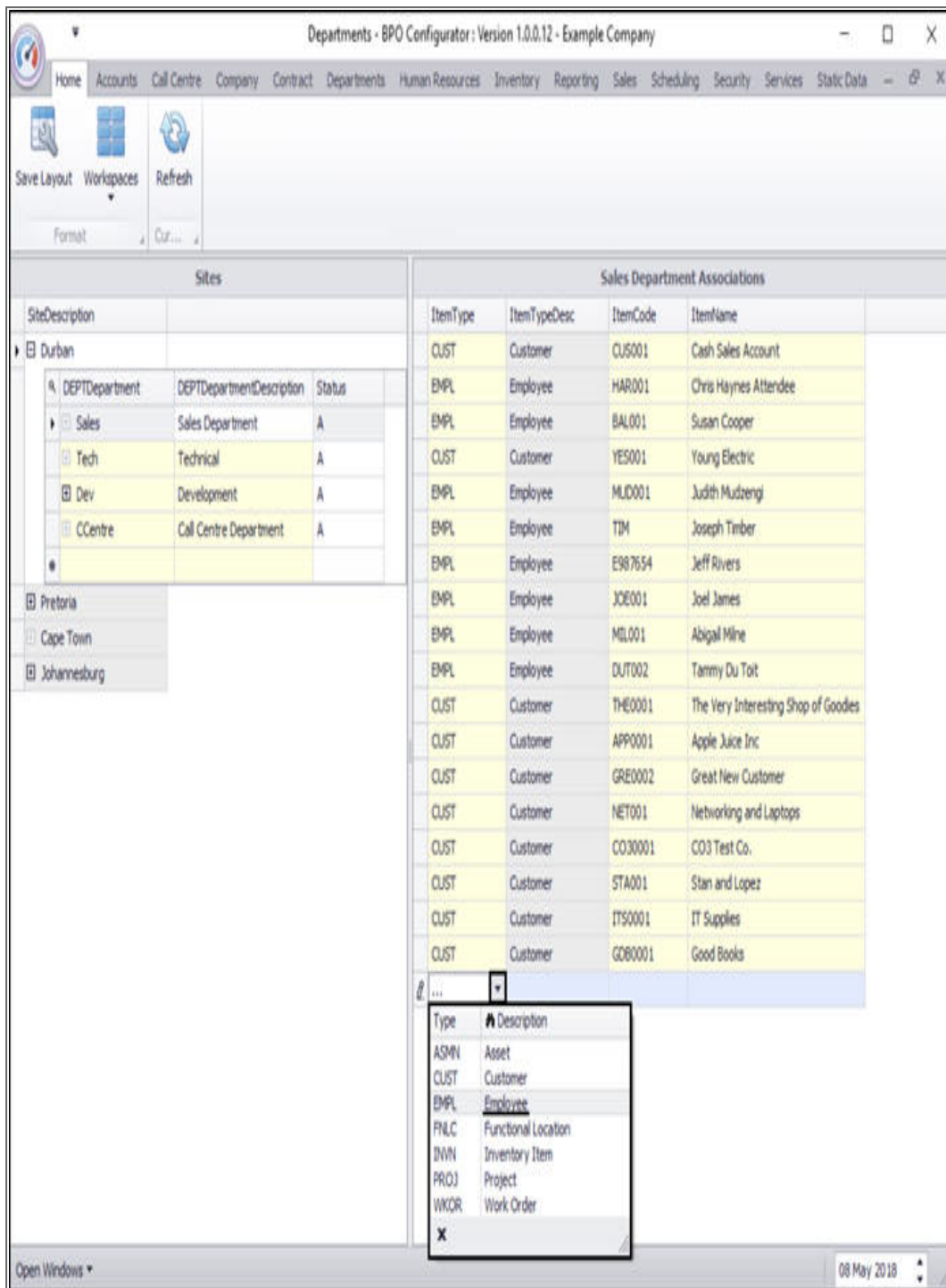
Format Ctrl...

Sites			Sales Department Associations			
SiteDescription			ItemType	ItemTypeDesc	ItemCode	ItemName
▶ Durban			▶ CUST	Customer	CUS001	Cash Sales Account
DEPTDepartment	DEPTDepartmentDescription	Status	EMPL	Employee	HAR001	Chris Haynes Attendee
▶ Sales	Sales Department	A	EMPL	Employee	BAL001	Susan Cooper
▶ Tech	Techical	A	CUST	Customer	YES001	Young Electric
▶ Dev	Development	A	EMPL	Employee	MUD001	Judith Mudzengi
▶ CCentre	Call Centre Department	A	EMPL	Employee	TJM	Joseph Timber
▶			EMPL	Employee	E987654	Jeff Rivers
▶ Pretoria			EMPL	Employee	JOE001	Joel James
▶ Cape Town			EMPL	Employee	ML001	Abigail Mine
▶ Johannesburg			EMPL	Employee	DUT002	Tammy Du Toit
			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	ITS0001	IT Supplies
			CUST	Customer	GOB0001	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.
- In this image, **Employee** has been selected.



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Home Accounts Call Centre Company Contract Departments Human Resources Inventory Reporting Sales Scheduling Security Services Static Data

Save Layout Workspaces Refresh

Format Cur...

Sites			Sales Department Associations			
SiteDescription			ItemType	ItemTypeDesc	ItemCode	ItemName
► Durban			CUST	Customer	CUS001	Cash Sales Account
DEPTDepartment	DEPTDepartmentDescription	Status	EMPL	Employee	HAR001	Chris Haynes Attendee
► Sales	Sales Department	A	EMPL	Employee	BAL001	Susan Cooper
Tech	Technical	A	CUST	Customer	YES001	Young Electric
Dev	Development	A	EMPL	Employee	MLD001	Judith Mudzengi
CCentre	Call Centre Department	A	EMPL	Employee	TIM	Joseph Timber
			EMPL	Employee	E987654	Jeff Rivers
► Pretoria			EMPL	Employee	JOE001	Joel James
Cape Town			EMPL	Employee	ML001	Abigail Mine
Johannesburg			EMPL	Employee	DUT002	Tammy Du Toit
			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	ITS0001	IT Supplies
			CUST	Customer	GOB0001	Good Books

... ▼

Type	Description
ASMN	Asset
CUST	Customer
EMPL	Employee
FNLC	Functional Location
INVN	Inventory Item
PROJ	Project
WKOR	Work Order

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- 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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Save Layout Workspaces Refresh

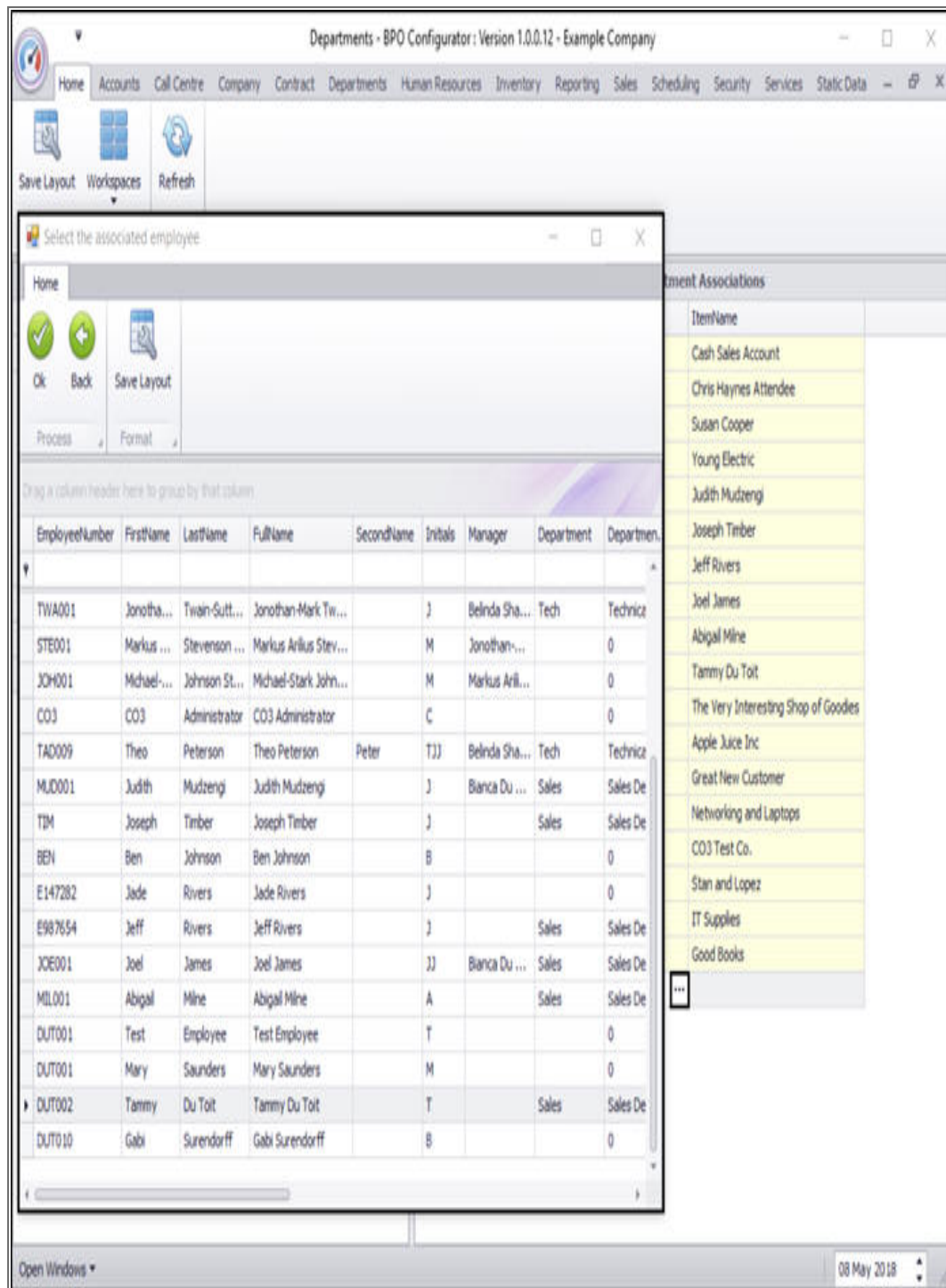
Format Cur...

Sites			Sales Department Associations			
SiteDescription			ItemType	ItemTypeDesc	ItemCode	ItemName
▶ Durban			CUST	Customer	CUS001	Cash Sales Account
▶ DEPTDepartment	DEPTDepartmentDescription	Status	EMPL	Employee	HAR001	Chris Haynes Attendee
▶ Sales	Sales Department	A	EMPL	Employee	BAL001	Susan Cooper
▶ Tech	Technical	A	CUST	Customer	YES001	Young Electric
▶ Dev	Development	A	EMPL	Employee	MUD001	Judith Mudzengi
▶ CCentre	Call Centre Department	A	EMPL	Employee	TIM	Joseph Timber
▶			EMPL	Employee	E987654	Jeff Rivers
▶ Pretoria			EMPL	Employee	JOE001	Joel James
▶ Cape Town			EMPL	Employee	MIL001	Abigail Mine
▶ Johannesburg			EMPL	Employee	DUT002	Tammy Du Toit
			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	ITS0001	IT Supplies
			CUST	Customer	GDB0001	Good Books
			EMPL	Employee		

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- 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*.



- 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 Accounts Call Centre Company Contract Departments Human Resources Inventory Reporting Sales Scheduling Security Services Static Data

Save Layout Workspaces Refresh

Select the associated employee

Home

Ok Back Save Layout

Process Format

Drag a column header here to group by that column

EmployeeNumber	FirstName	LastName	FullName	SecondName	Initials	Manager	Department	Departmen...
RED001	George J...	Reddy Jeff...	George James Red...		G	Chris Hayn...	Tech	Technical
EMP123	Carolina ...	Lourens va...	Carolina Suzzetta ...		C	Bianca Du ...	0	
TWA001	Jonotha...	Twain-Sutt...	Jonathan-Mark Tw...		J	Belinda Sha...	Tech	Technical
STE001	Markus ...	Stevenson ...	Markus Arlius Stev...		M	Jonathan...	0	
JOH001	Michael...	Johnson St...	Michael-Stark John...		M	Marius Arli...	0	
CO3	CO3	Administrator	CO3 Administrator		C		0	
TAD009	Theo	Peterson	Theo Peterson	Peter	TJ	Belinda Sha...	Tech	Technical
MUD001	Judith	Mudzengi	Judith Mudzengi		J	Bianca Du ...	Sales	Sales Des
TJM	Joseph	Timber	Joseph Timber		J		Sales	Sales Des
BEN	Ben	Johnson	Ben Johnson		B		0	
JAD01	Jade	Rivers	Jade Rivers		J	Bianca Du ...	Sales	Sales Des
E987654	Jeff	Rivers	Jeff Rivers		J		Sales	Sales Des
JOE001	Joel	James	Joel James		J	Bianca Du ...	Sales	Sales Des
MIL001	Abigal	Mine	Abigal Mine		A		Sales	Sales Des
DUT001	Test	Employee	Test Employee		T		0	
DUT001	Mary	Saunders	Mary Saunders		M		0	
DUT002	Tammy	Du Toit	Tammy Du Toit		T		Sales	Sales Des

Item Associations

ItemName
Cash Sales Account
Chris Haynes Attendee
Susan Cooper
Young Electric
Judith Mudzengi
Joseph Timber
Jeff Rivers
Joel James
Abigal Mine
Tammy Du Toit
The Very Interesting Shop of Goodies
Apple Juice Inc
Great New Customer
Networking and Laptops
CO3 Test Co.
Stan and Lopez
IT Supplies
Good Books

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- The selected employee details will now populate the **Item Code** and **Item Name** text boxes.

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Save Layout Workspaces Refresh

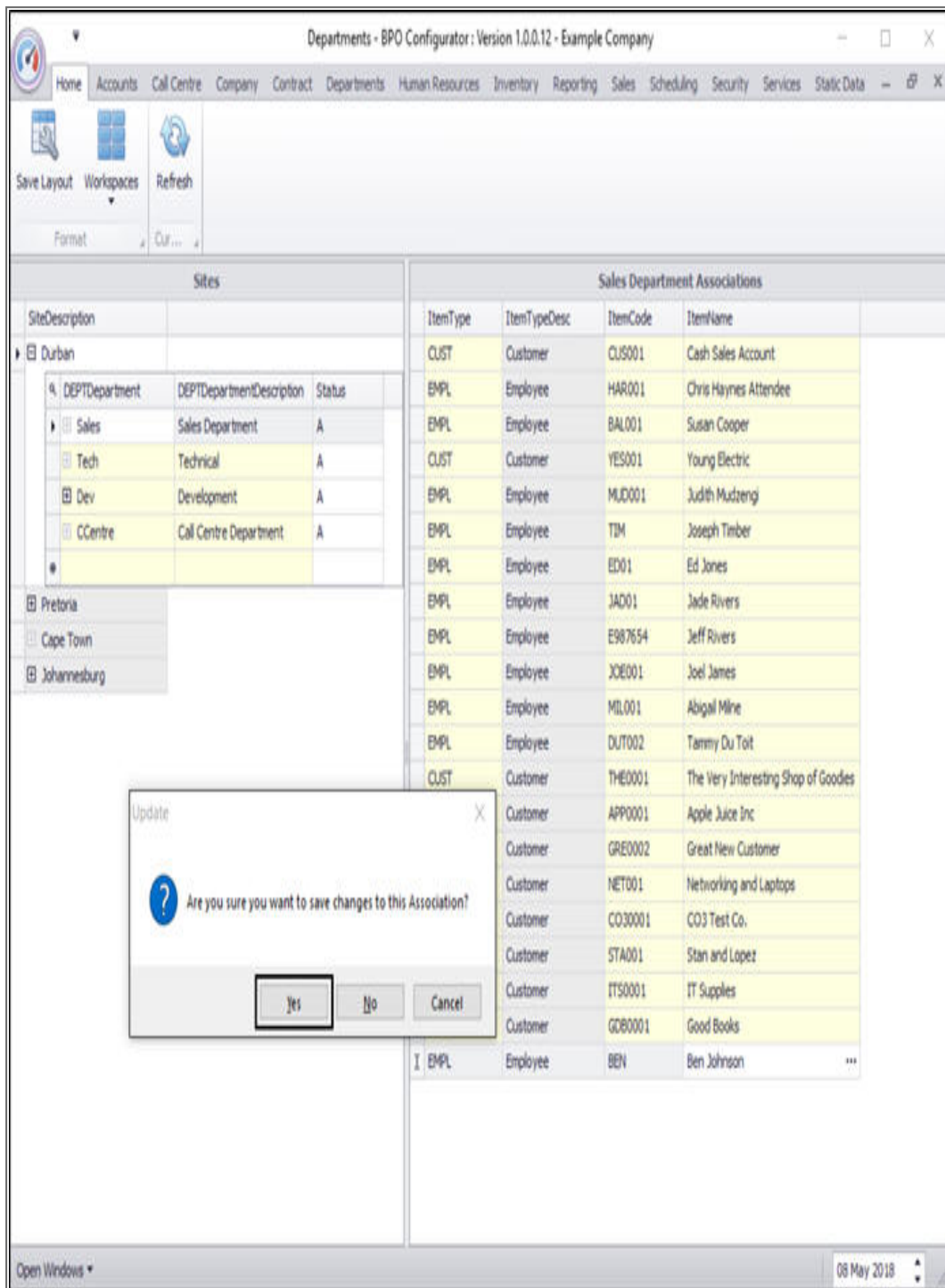
Format Cur...

Sites			Sales Department Associations			
SiteDescription			ItemType	ItemTypeDesc	ItemCode	ItemName
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Dev	Development	A	EMPL	Employee	MUD001	Judith Mudzengi
CCentre	Call Centre Department	A	EMPL	Employee	TIM	Joseph Timber
			EMPL	Employee	E987654	Jeff Rivers
▶ Pretoria			EMPL	Employee	JOE001	Joel James
▶ Cape Town			EMPL	Employee	MIL001	Abigail Milne
▶ Johannesburg			EMPL	Employee	OUT002	Tammy Du Toit
			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	ITS0001	IT Supplies
			CUST	Customer	GOB0001	Good Books
			EMPL	Employee	BEN	Ben Johnson

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- 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**.



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

Departments - BPO Configurator: Version 1.0.0.12 - Example Company

Home Accounts Call Centre Company Contract Departments Human Resources Inventory Reporting Sales Scheduling Security Services Static Data

Save Layout Workspaces Refresh

Format

Sites			Sales Department Associations			
SiteDescription			ItemType	ItemTypeDesc	ItemCode	ItemName
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Tech	Technical	A	CUST	Customer	YES001	Young Electric
Dev	Development	A	EMPL	Employee	MUD001	Judith Mudzengi
CCentre	Call Centre Department	A	EMPL	Employee	TIM	Joseph Timber
			EMPL	Employee	ED01	Ed Jones
▶ Pretoria			EMPL	Employee	JAD01	Jade Rivers
Cape Town			EMPL	Employee	E987654	Jeff Rivers
Johannesburg			EMPL	Employee	JOE001	Joel James
			EMPL	Employee	MIL001	Abigail Milne
			EMPL	Employee	DUT002	Tammy Du Toit
			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	ITS0001	IT Supplies
			CUST	Customer	GDB0001	Good Books
			EMPL	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 one or more linked ***sub-departments***.
- Click on this ***expand*** button.

Departments - BPO Configurator : Version 1.0.0.12 - Example Company

Home Accounts Call Centre Company Contract Departments Human Resources Inventory Reporting Sales Scheduling Security Services Static Data

Save Layout Workspaces Refresh

Format Cur...

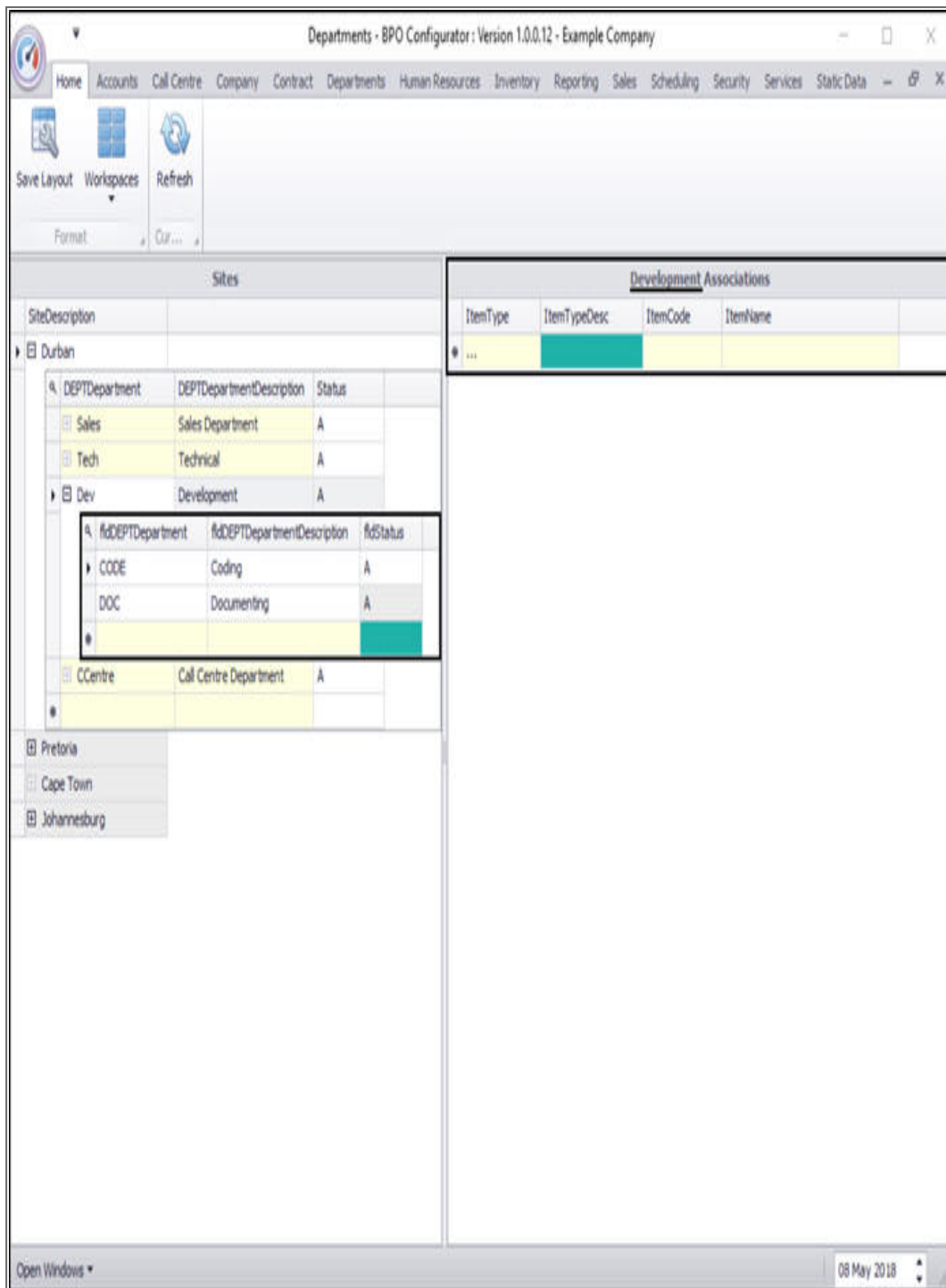
Sites			Sales Department Associations			
SiteDescription			ItemType	ItemTypeDesc	ItemCode	ItemName
▶ Durban			CUST	Customer	CUS001	Cash Sales Account
DEPTDepartment	DEPTDepartmentDescription	Status	EMPL	Employee	HAR001	Chris Haynes Attendee
▶ Sales	Sales Department	A	EMPL	Employee	BAL001	Susan Cooper
Tech	Technical	A	CUST	Customer	YES001	Young Electric
Dev	Development	A	EMPL	Employee	MUD001	Judith Mudzengi
CCentre	Call Centre Department	A	EMPL	Employee	TIM	Joseph Timber
			EMPL	Employee	ED01	Ed Jones
▶ Pretoria			EMPL	Employee	JAD01	Jade Rivers
Cape Town			EMPL	Employee	E987654	Jeff Rivers
Johannesburg			EMPL	Employee	JOE001	Joel James
			EMPL	Employee	MIL001	Abigail Mine
			EMPL	Employee	DUT002	Tammy Du Toit
			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	ITS0001	IT Supplies
			CUST	Customer	GOB0001	Good Books
			EMPL	Employee	BEV1	Ben Johnson
			▶ ...			

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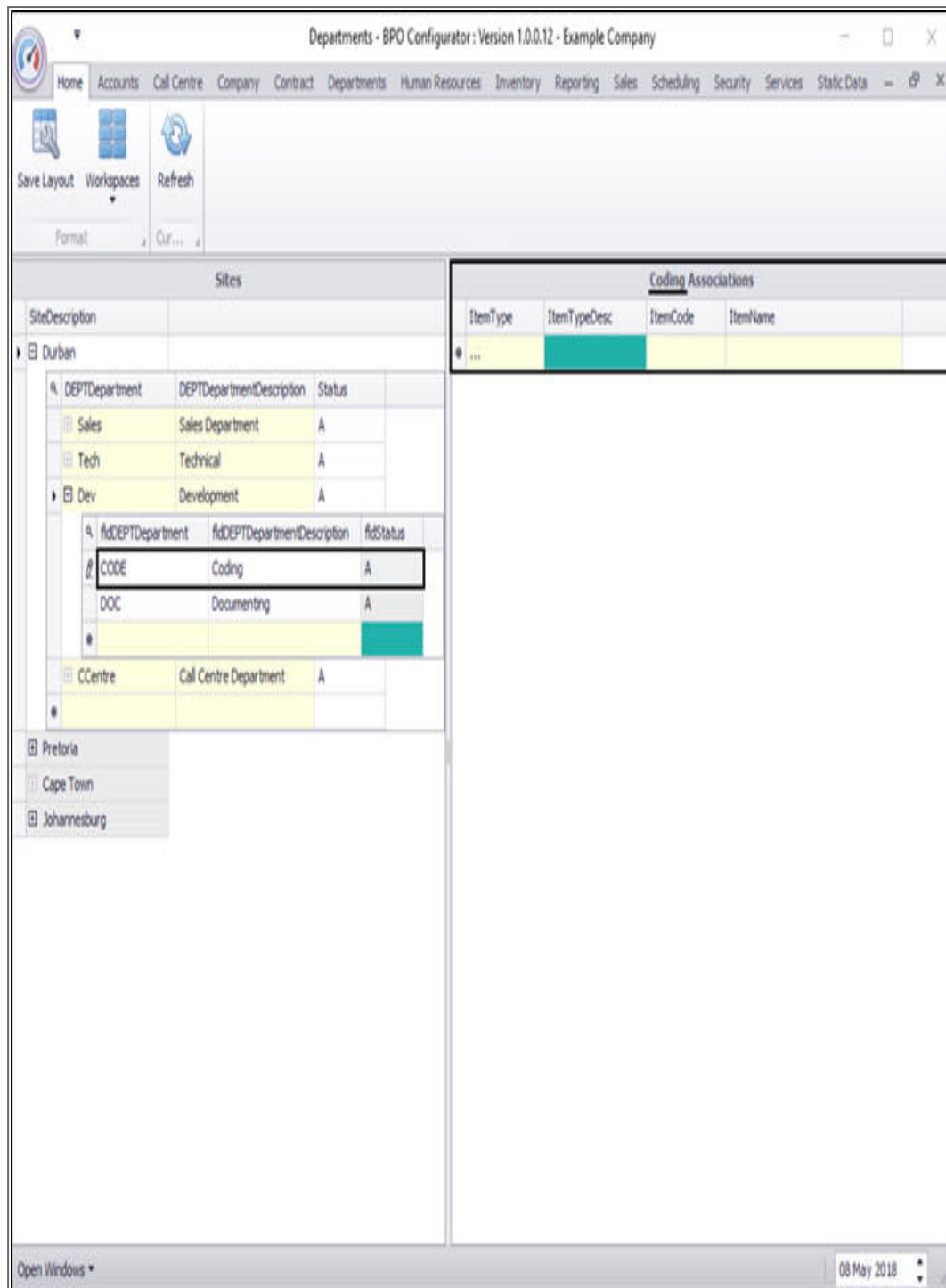
- The **Development Department** frame will be expanded.
- Here you can view two linked **sub-departments**:

- **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.



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

- 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.



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

Departments - BPO Configurator : Version 1.0.0.12 - Example Company

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Save Layout Workspaces Refresh

Format Cur...

Sites			Development Associations			
SiteDescription			ItemType	ItemTypeDesc	ItemCode	ItemName
Urban			...			
DEPTDepartment	DEPTDepartmentDescription	Status				
Sales	Sales Department	A				
Tech	Technical	A				
Dev	Development	A				
fdDEPTDepartment	fdDEPTDepartmentDescription	fdStatus				
CODE	Coding	A				
DOC	Documenting	A				
CCentre	Call Centre Department	A				
Pretoria						
Cape Town						
Johannesburg						

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