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.

CO3 Technologies (Pty) Ltd © Company Confidential

SITES FRAME

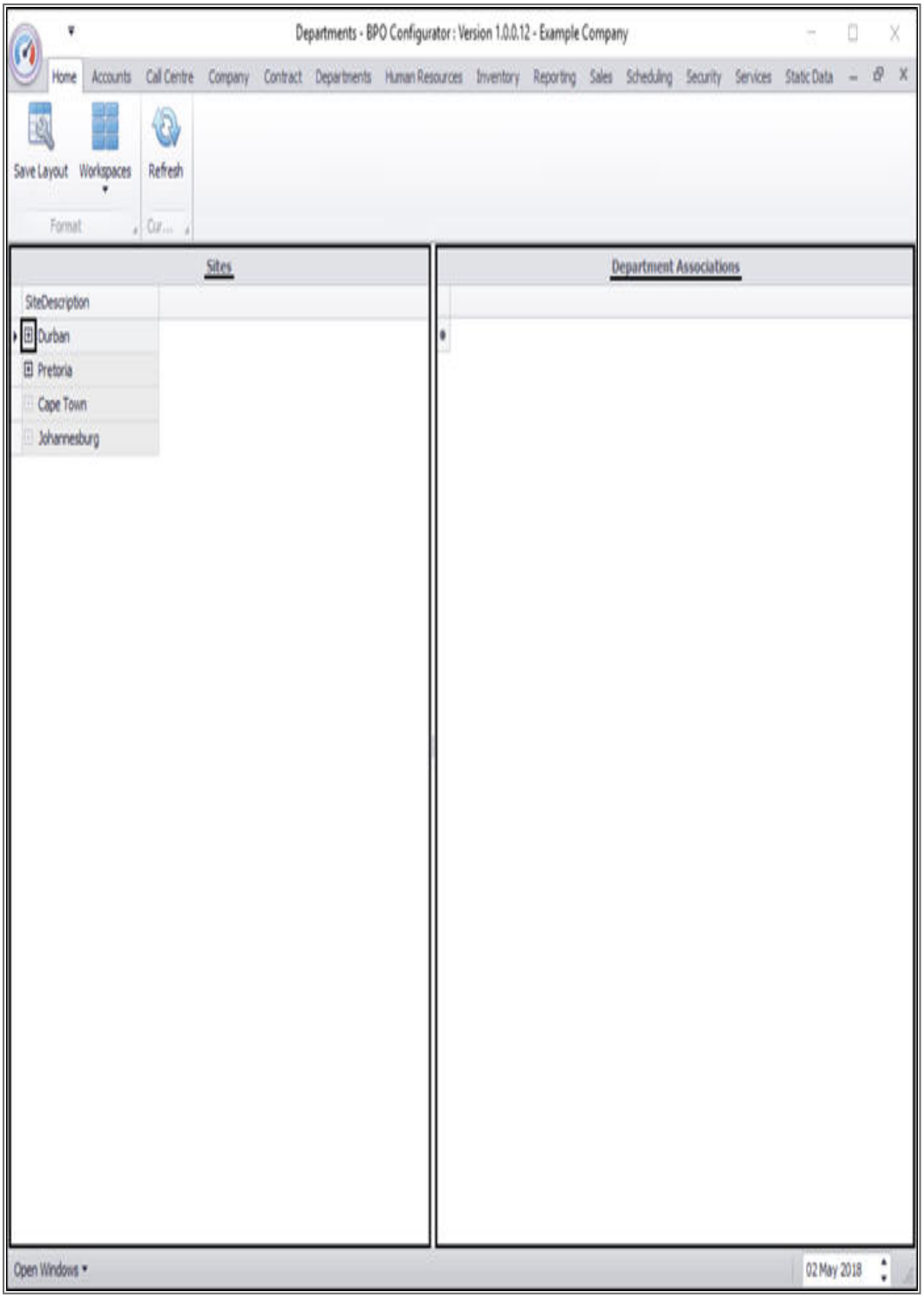
The ***Sites*** frame lists all the sites linked to this company.

- **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.

CO3 Technologies (Pty) Ltd © Company Confidential



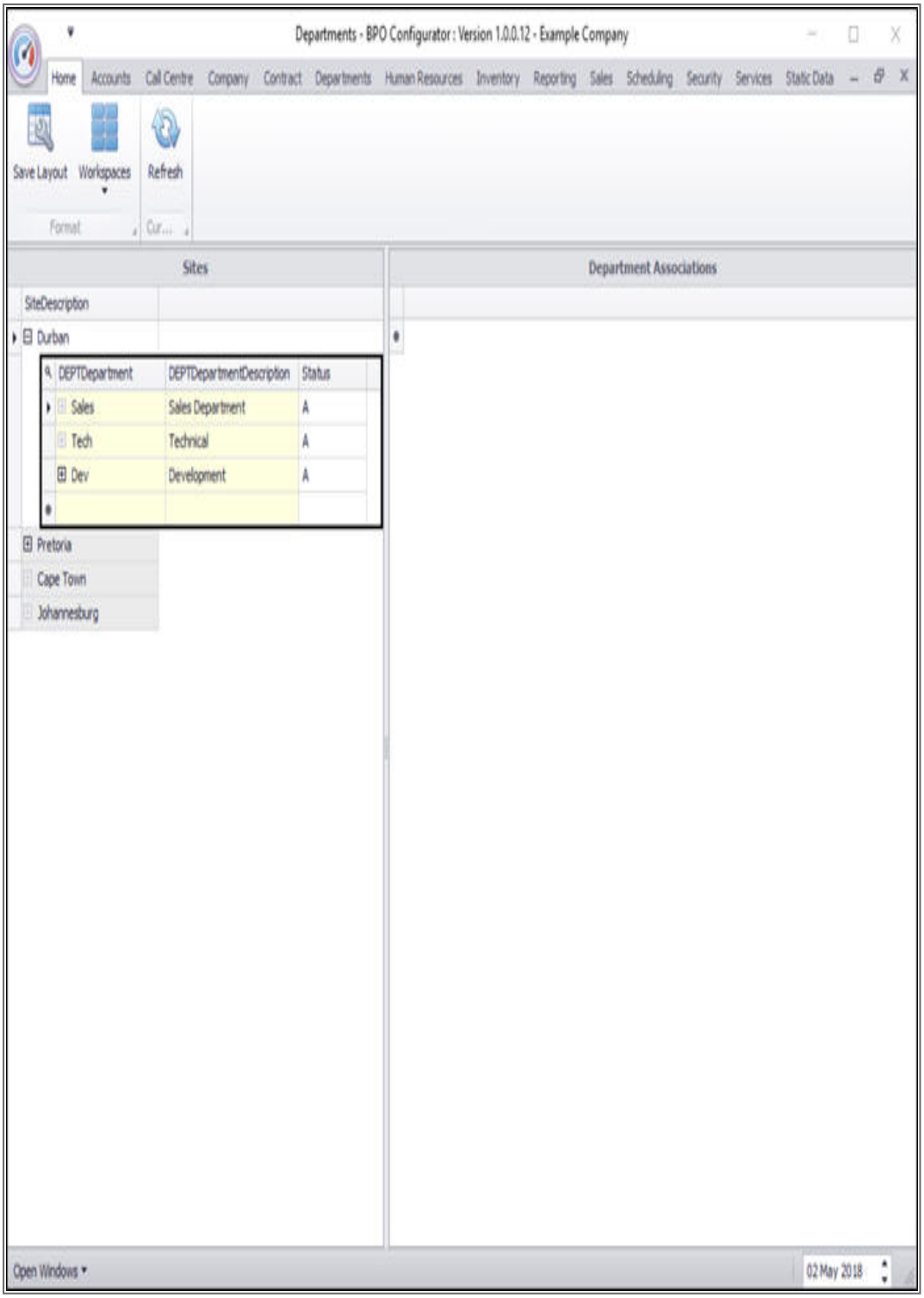
CO3 Technologies (Pty) Ltd © Company Confidential

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.

CO3 Technologies (Pty) Ltd © Company Confidential

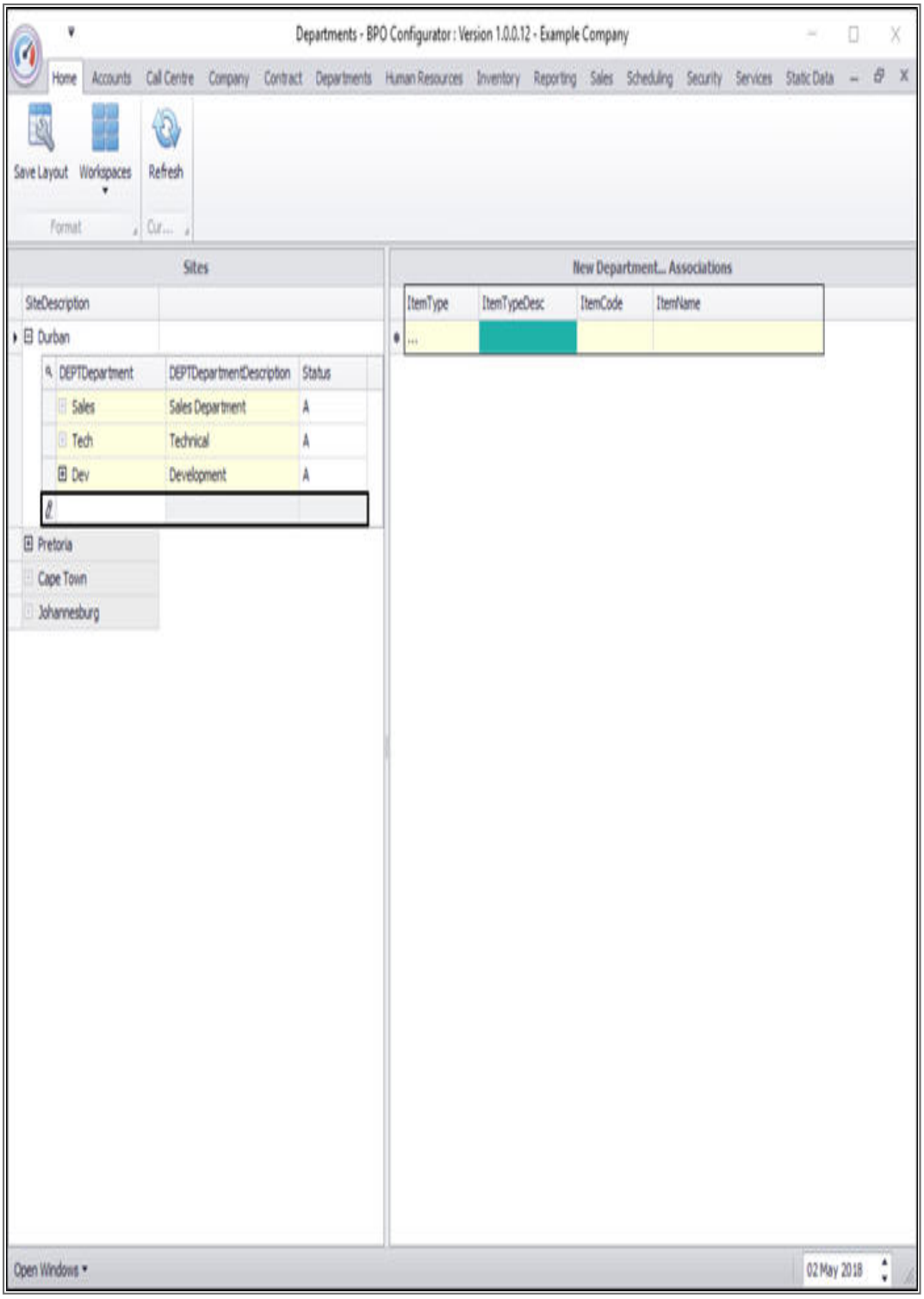


CO3 Technologies (Pty) Ltd © Company Confidential

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).

CO3 Technologies (Pty) Ltd © Company Confidential

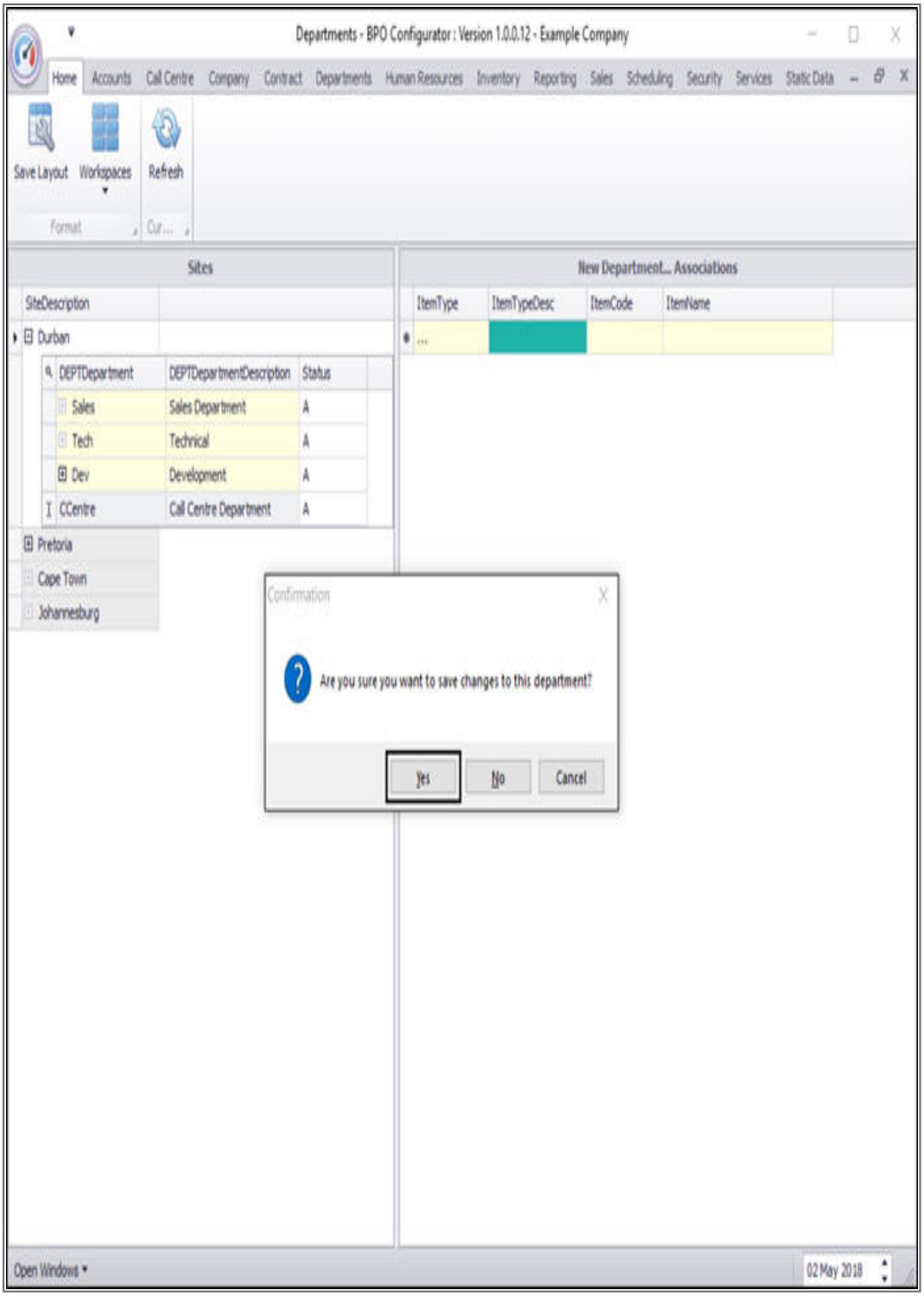


- When you have finished entering the new department details, either press ***Tab*** or ***Enter*** on your keyboard.

CO3 Technologies (Pty) Ltd © Company Confidential

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

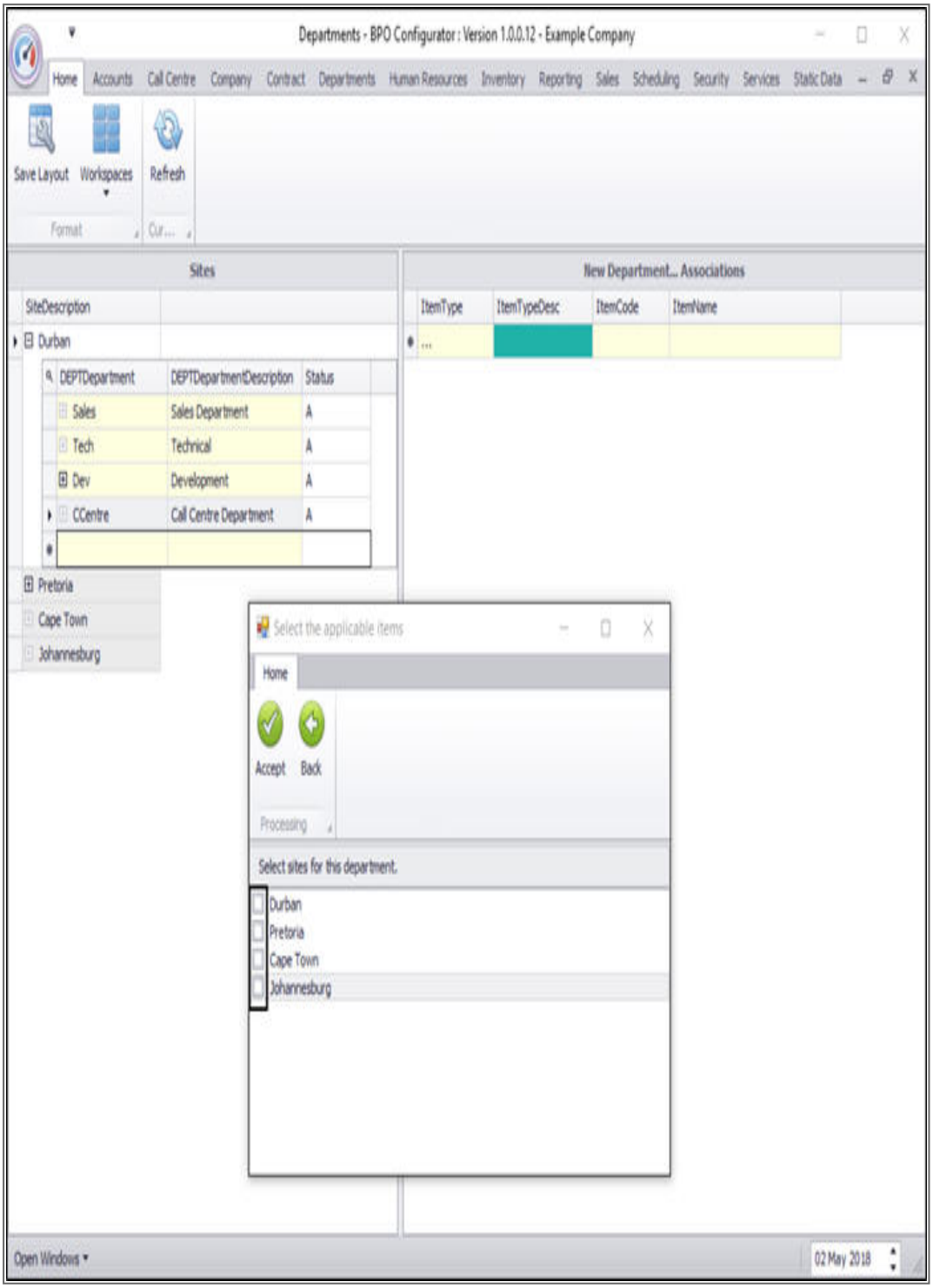
CO3 Technologies (Pty) Ltd © Company Confidential



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

CO3 Technologies (Pty) Ltd © Company Confidential

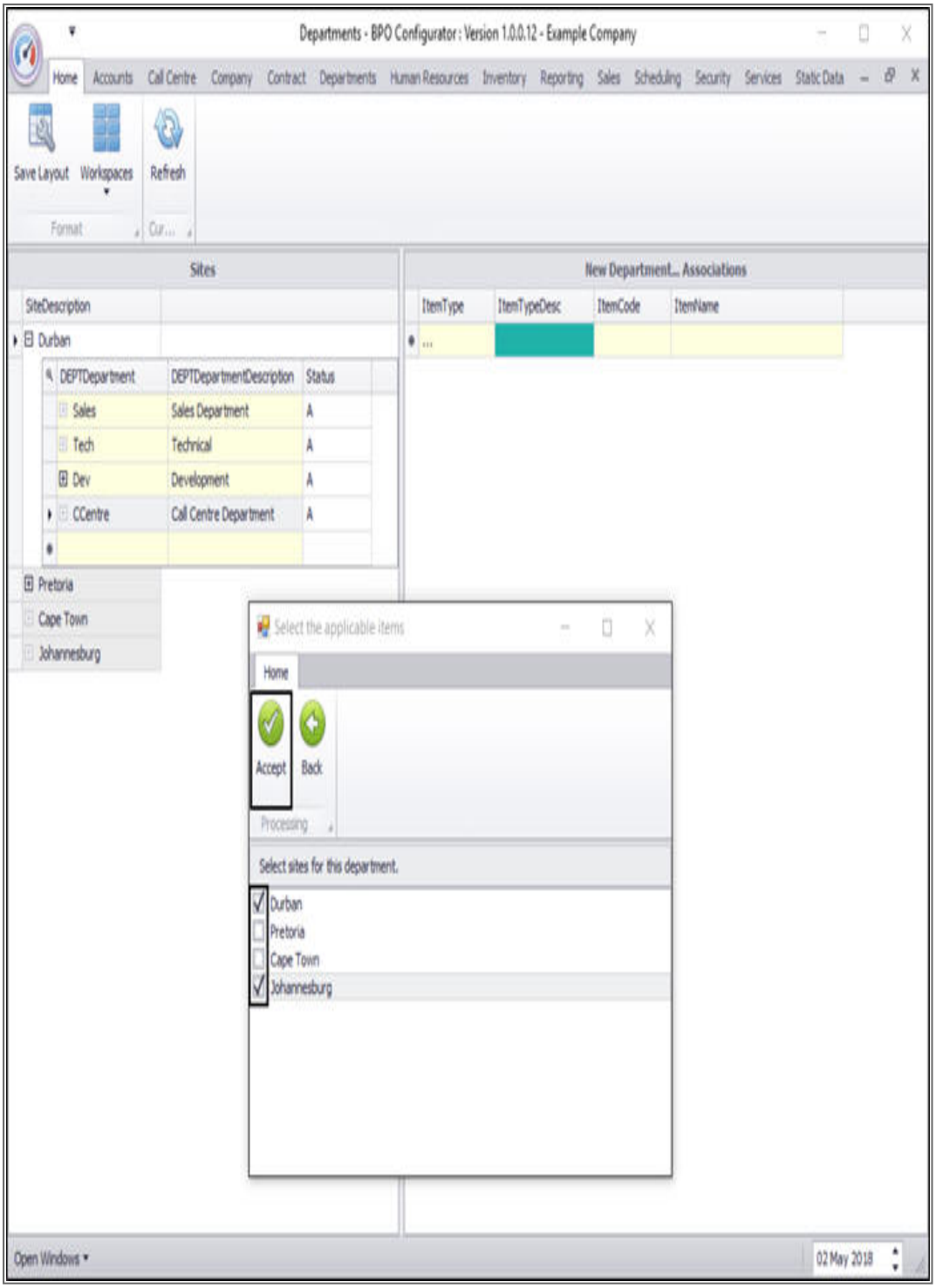
- A ***Select the applicable items*** screen will pop up.
- Here you can click on the ***check box(es)*** to ***link*** this new department to ***any*** or ***all*** of the ***site(s)*** listed in this screen.



CO3 Technologies (Pty) Ltd © Company Confidential

- 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***.

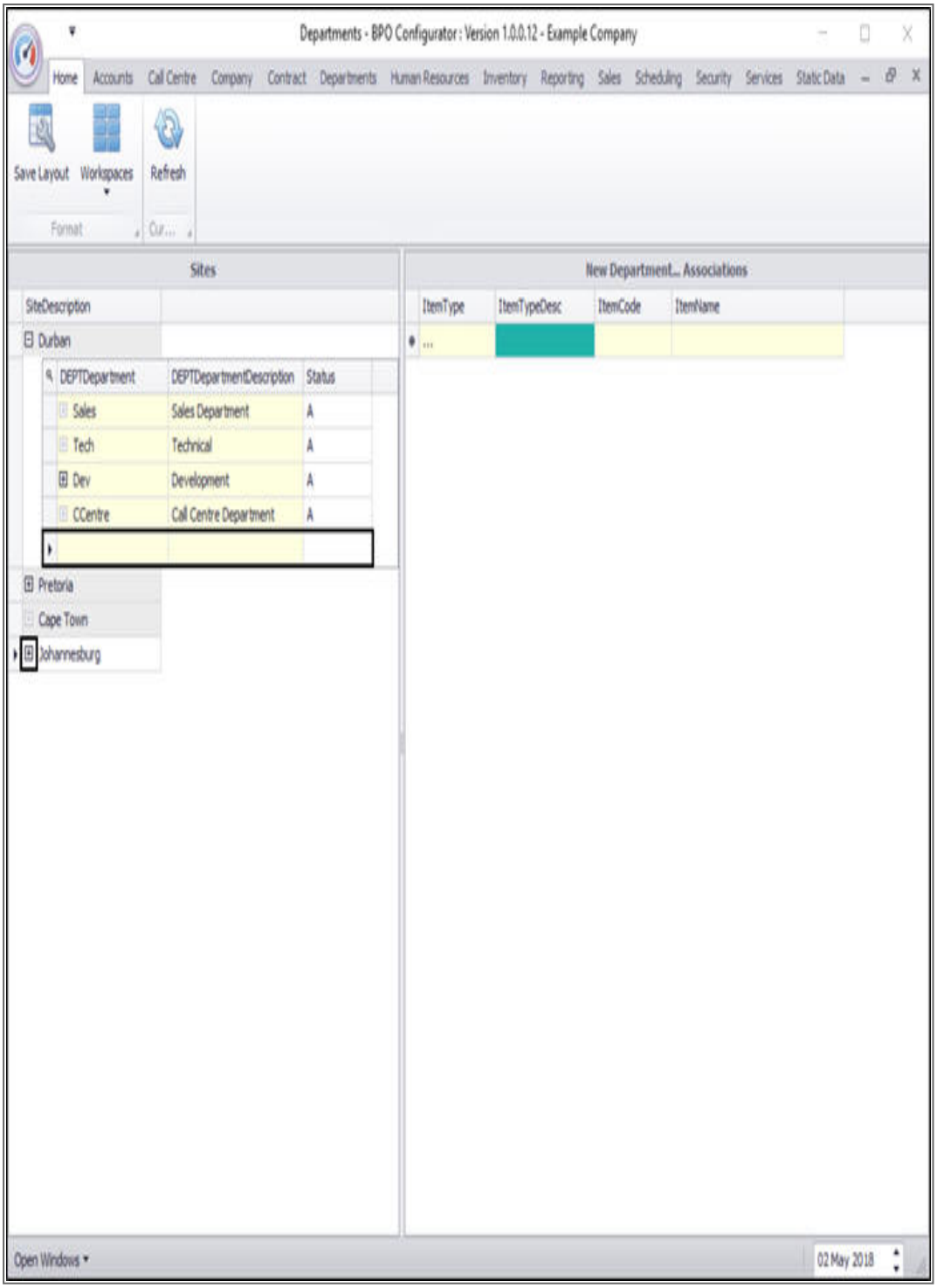
CO3 Technologies (Pty) Ltd © Company Confidential



CO3 Technologies (Pty) Ltd © Company Confidential

- 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.

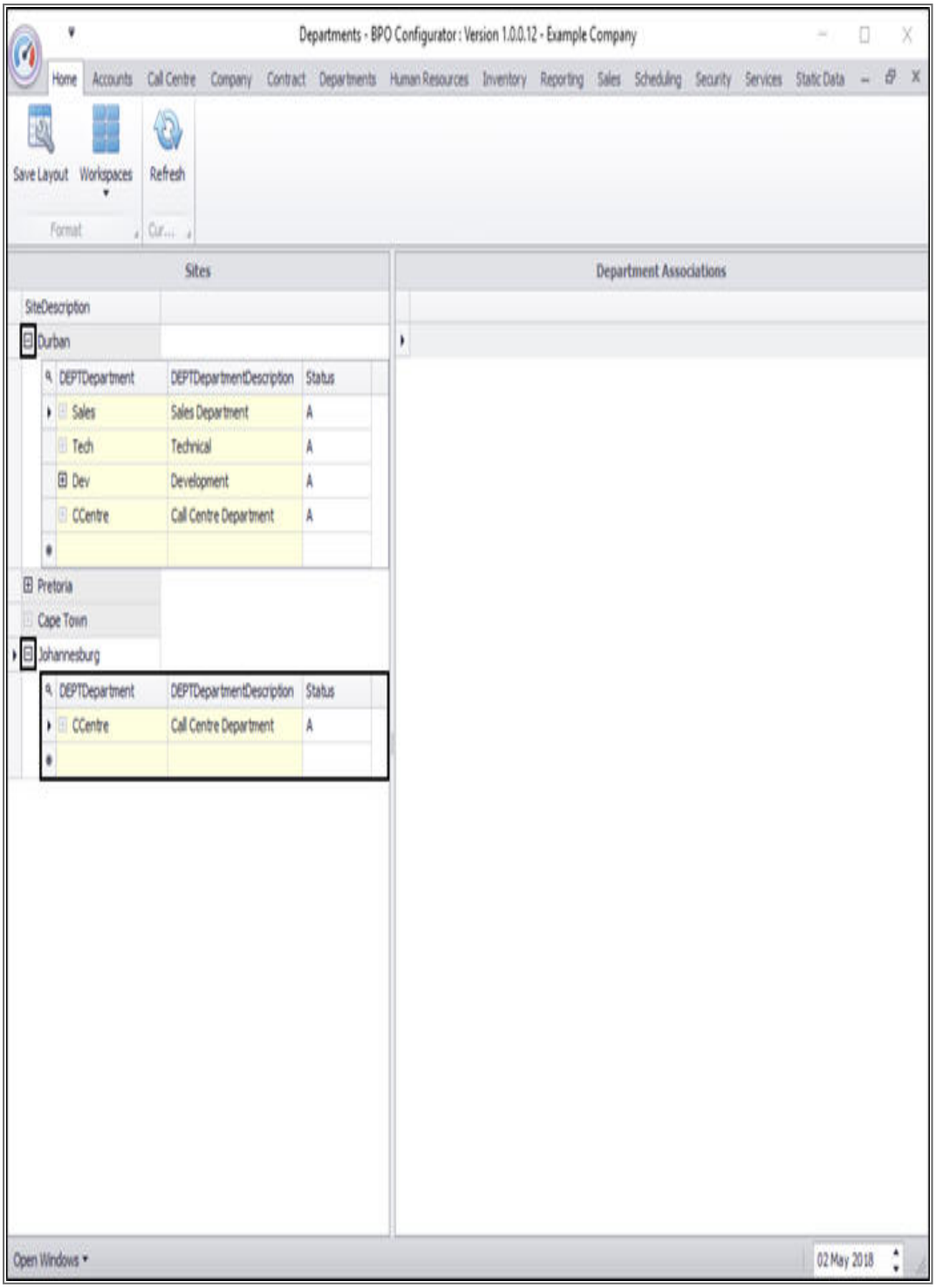
CO3 Technologies (Pty) Ltd © Company Confidential



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

CO3 Technologies (Pty) Ltd © Company Confidential

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

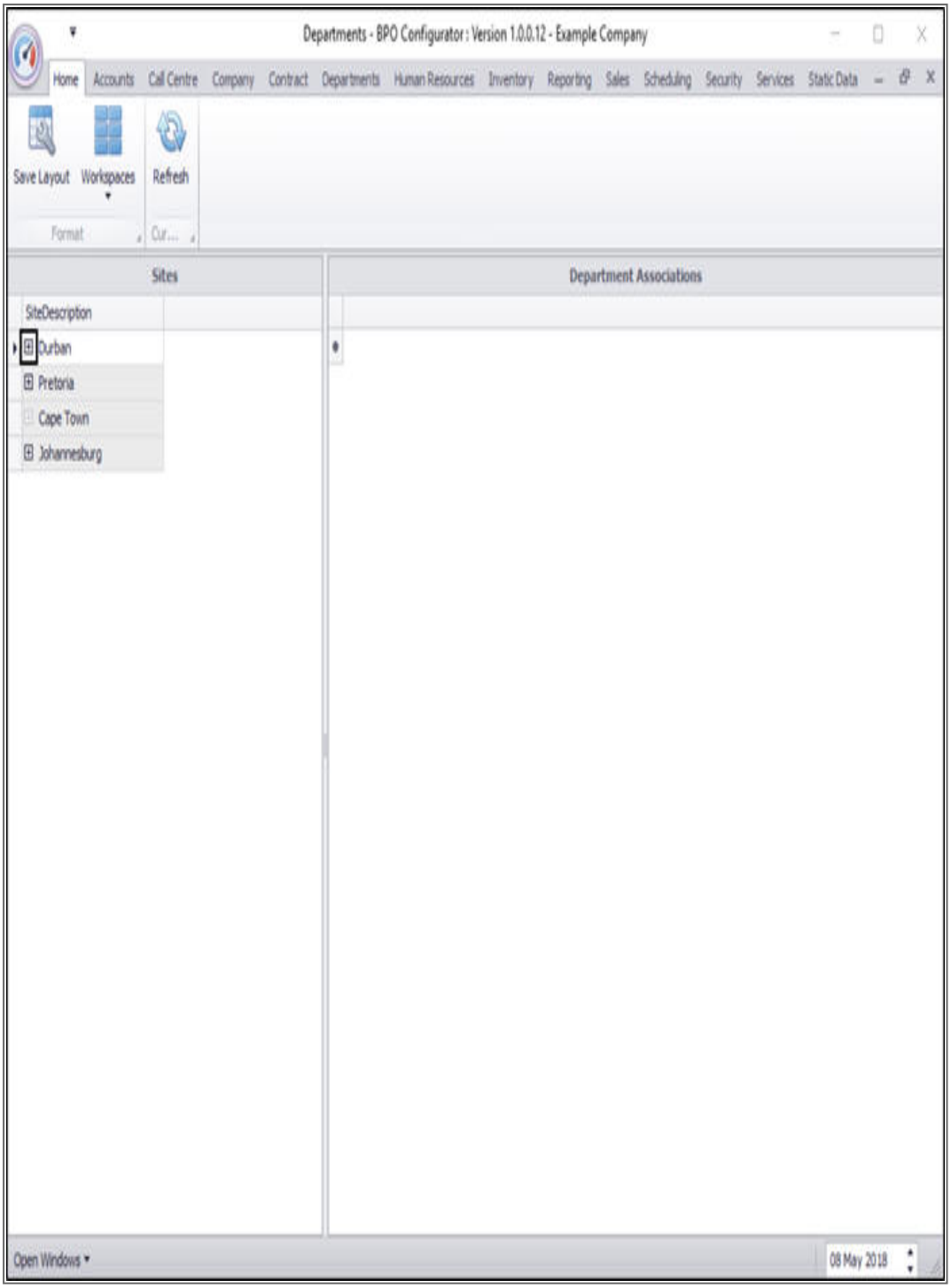


CO3 Technologies (Pty) Ltd © Company Confidential

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.

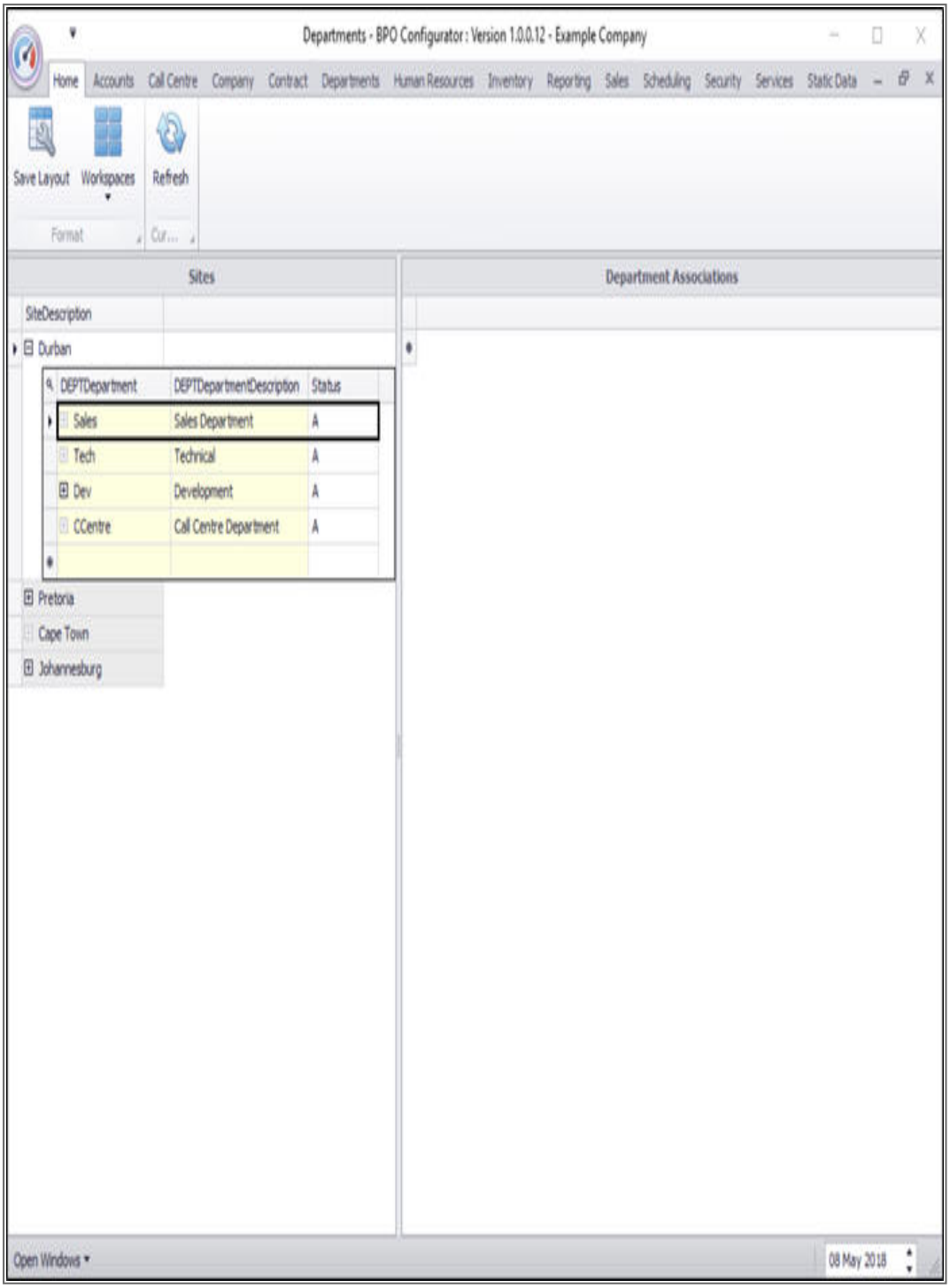
CO3 Technologies (Pty) Ltd © Company Confidential



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

CO3 Technologies (Pty) Ltd © Company Confidential

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



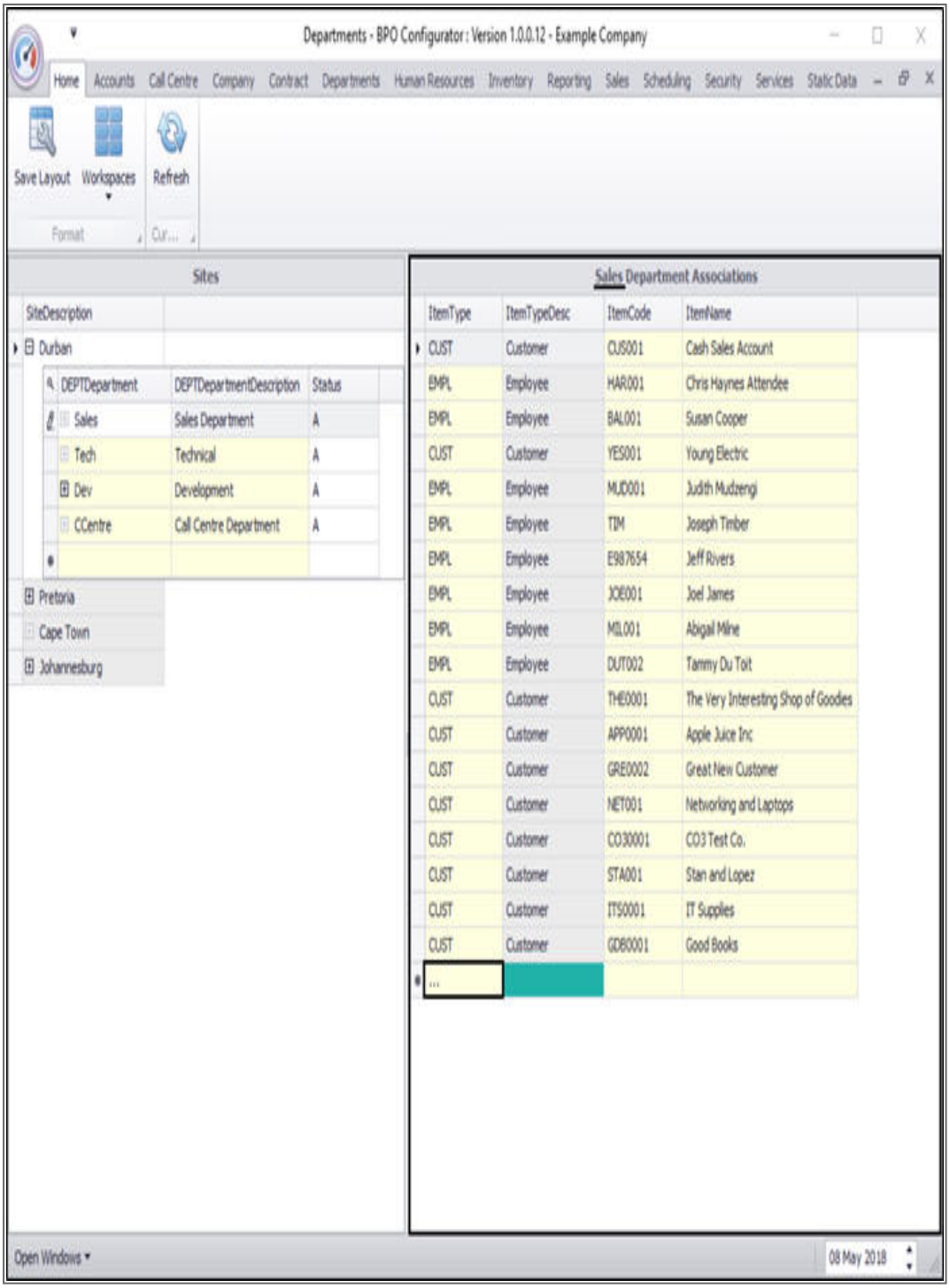
CO3 Technologies (Pty) Ltd © Company Confidential

- 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.

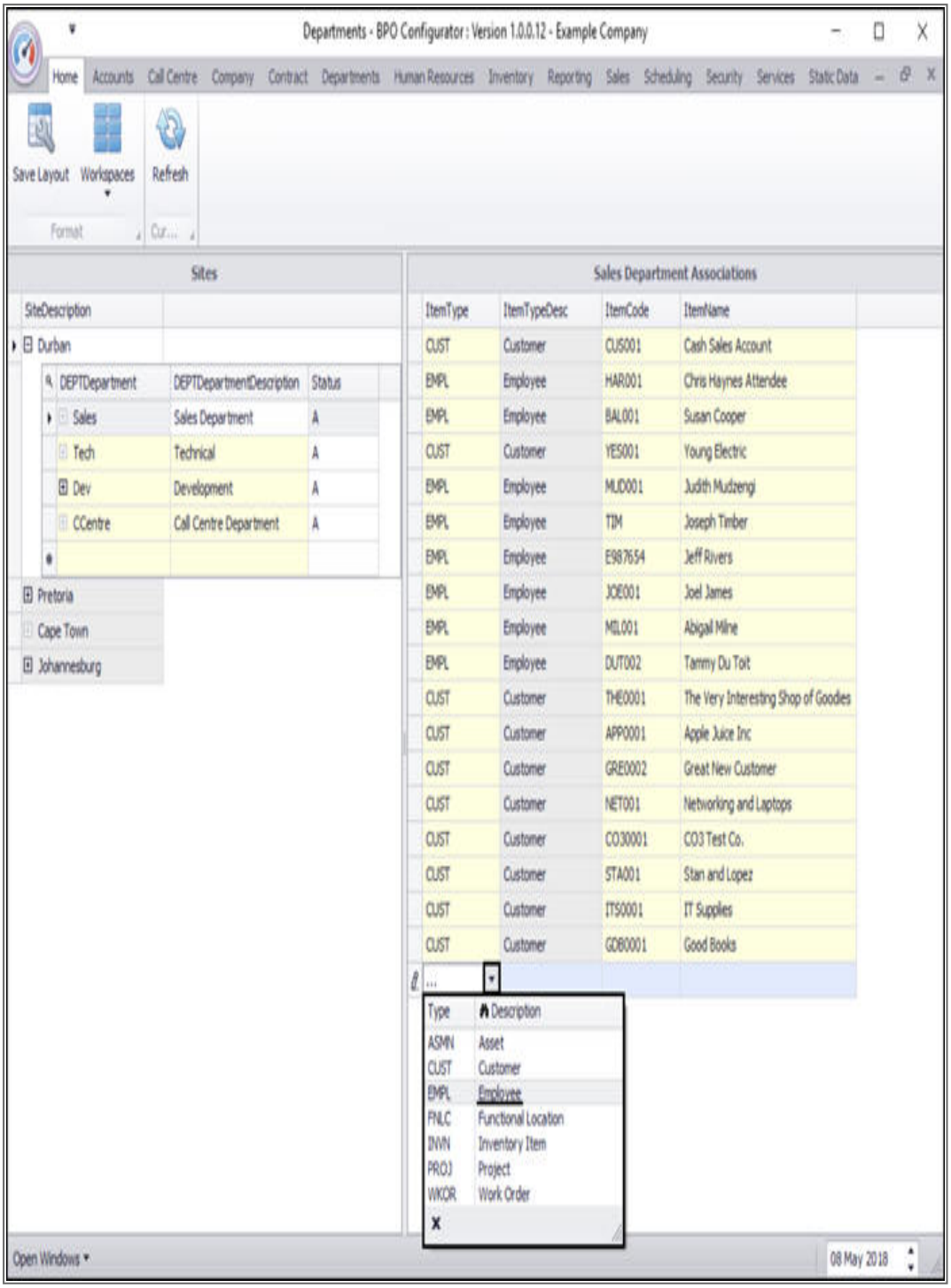
CO3 Technologies (Pty) Ltd © Company Confidential



- A ***drop-down arrow*** will be revealed. Click on this arrow to display the ***Item Type*** menu.

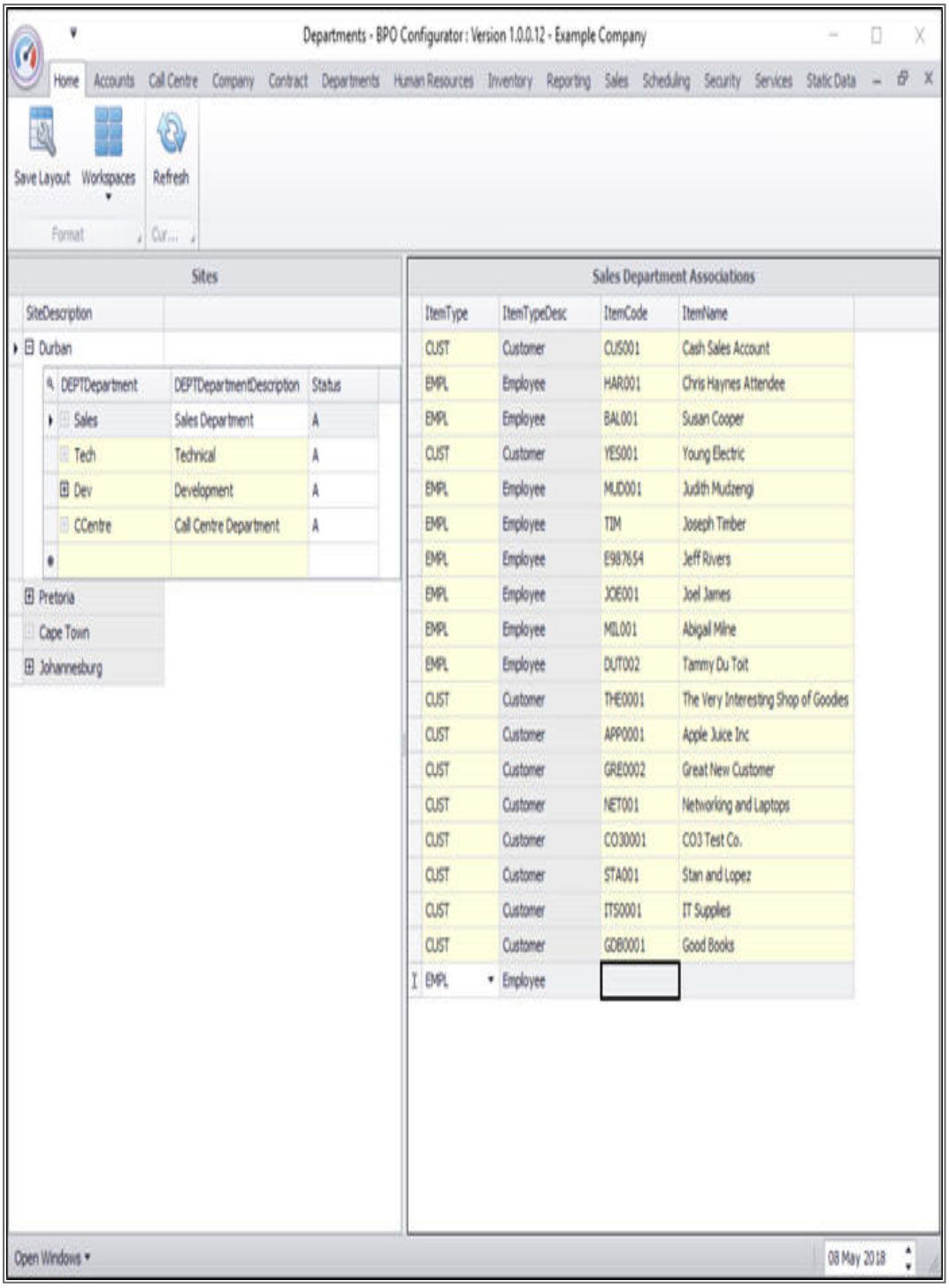
CO3 Technologies (Pty) Ltd © Company Confidential

- Click on the ***Item Type*** that you wish to ***associate*** with this department.
    - In this image, ***Employee*** has been selected.



CO3 Technologies (Pty) Ltd © Company Confidential

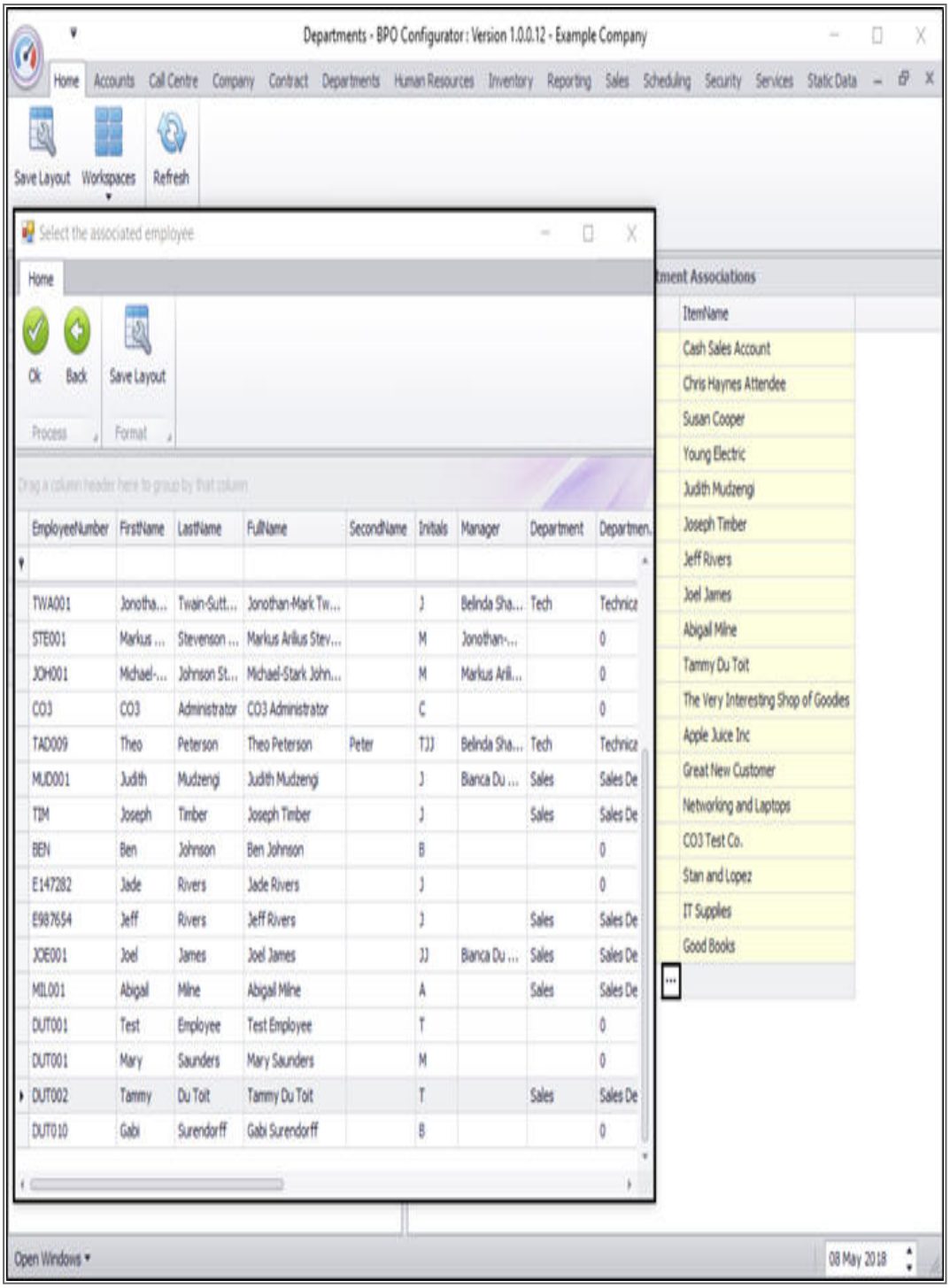
- The ***Item Type*** and ***Item Description*** text boxes will now pop-ulate with the selected details.
- Click in the ***Item Code*** text box.



CO3 Technologies (Pty) Ltd © Company Confidential

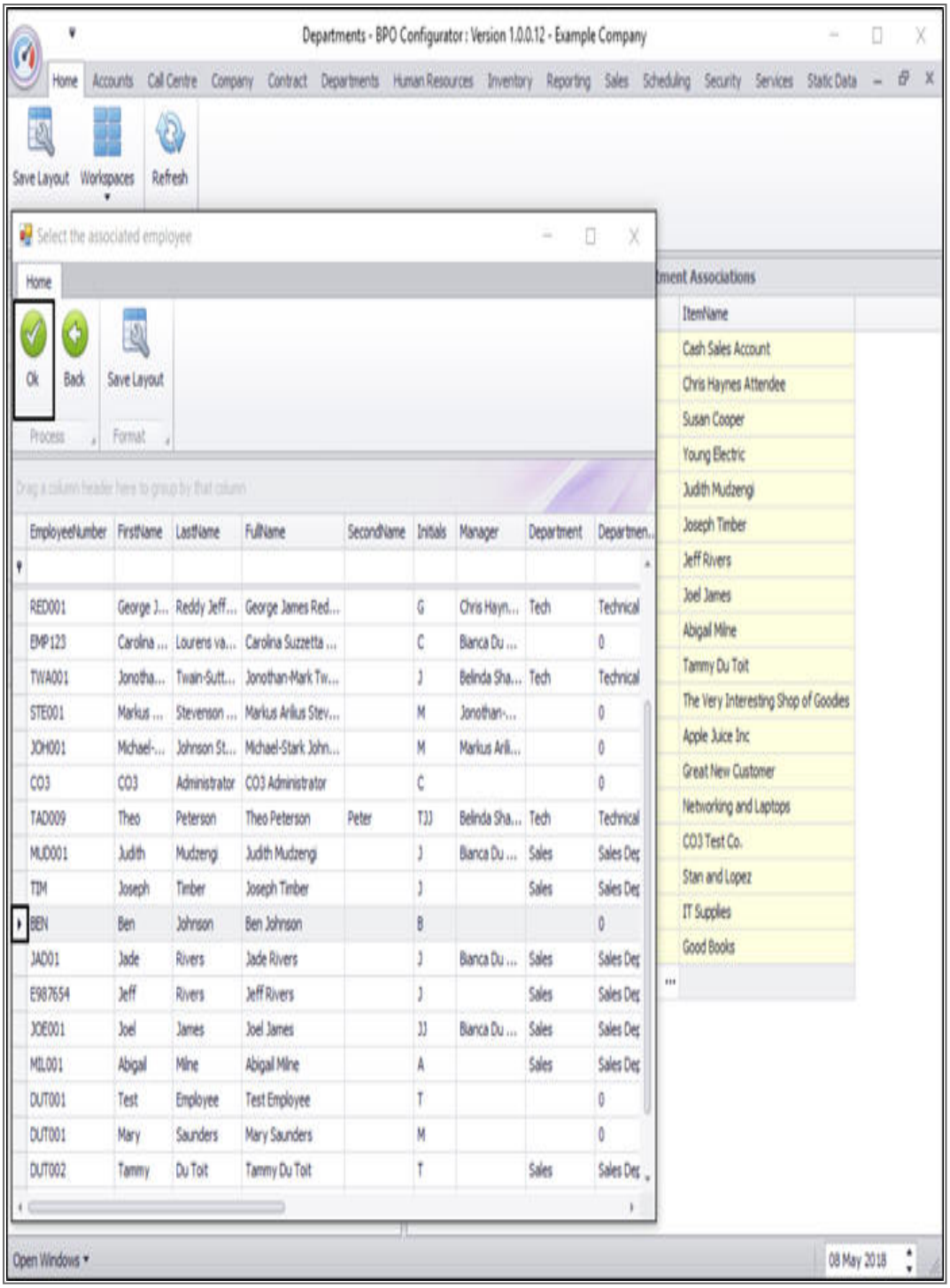
- An ***ellipsis*** button will be revealed.
- Click on this button to display the ***Select the associated employee*** pop up screen.
    - **Note**: This pop up screen will ***change*** according to your initial Item Type selection. If, for example, you selected ***Asset***, then the correlating pop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

CO3 Technologies (Pty) Ltd © Company Confidential



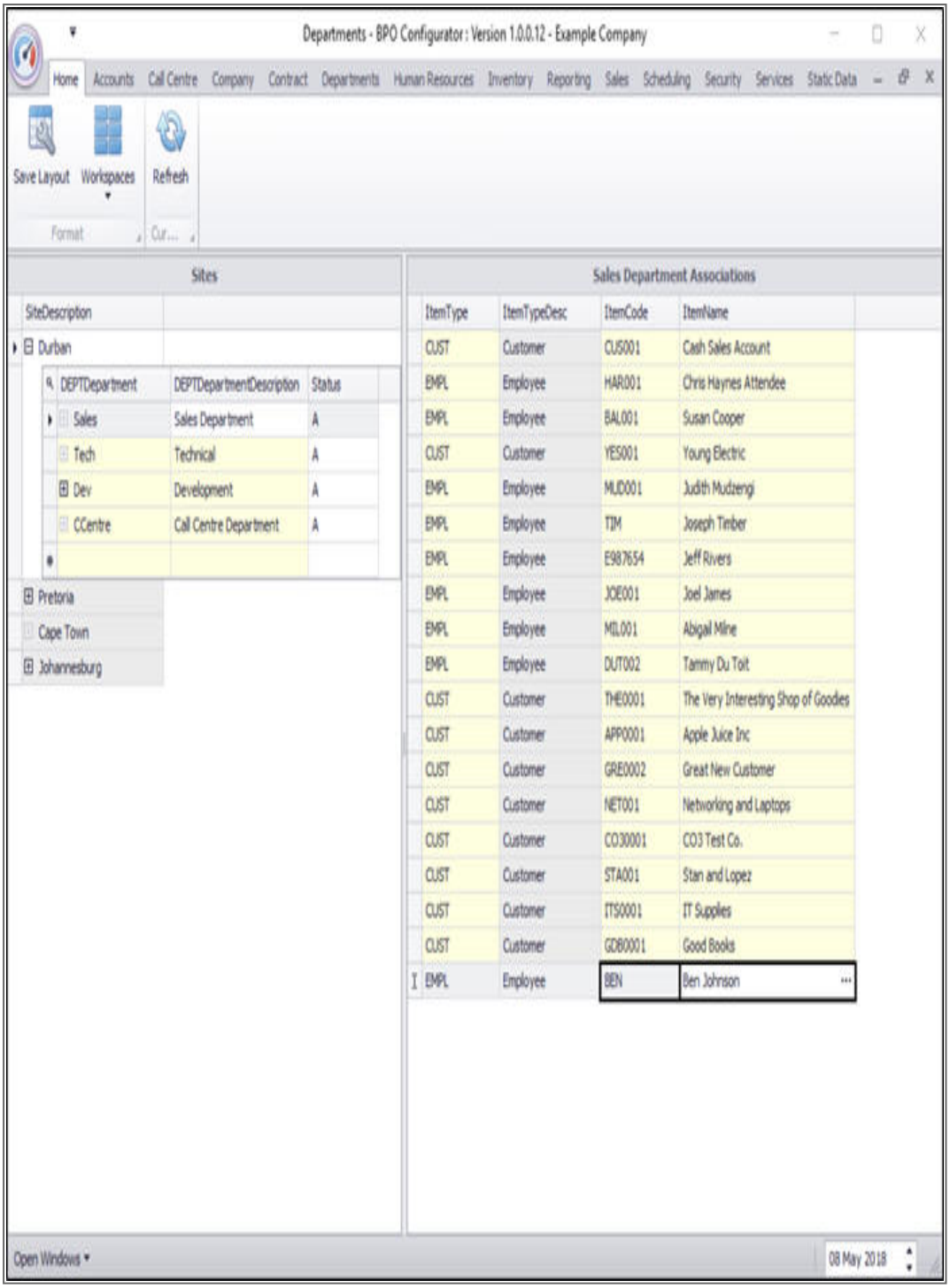
- Click on the ***row selector*** in front of the ***employee*** that you wish to ***link*** to this department.
- Click on ***Ok***.

CO3 Technologies (Pty) Ltd © Company Confidential



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

CO3 Technologies (Pty) Ltd © Company Confidential

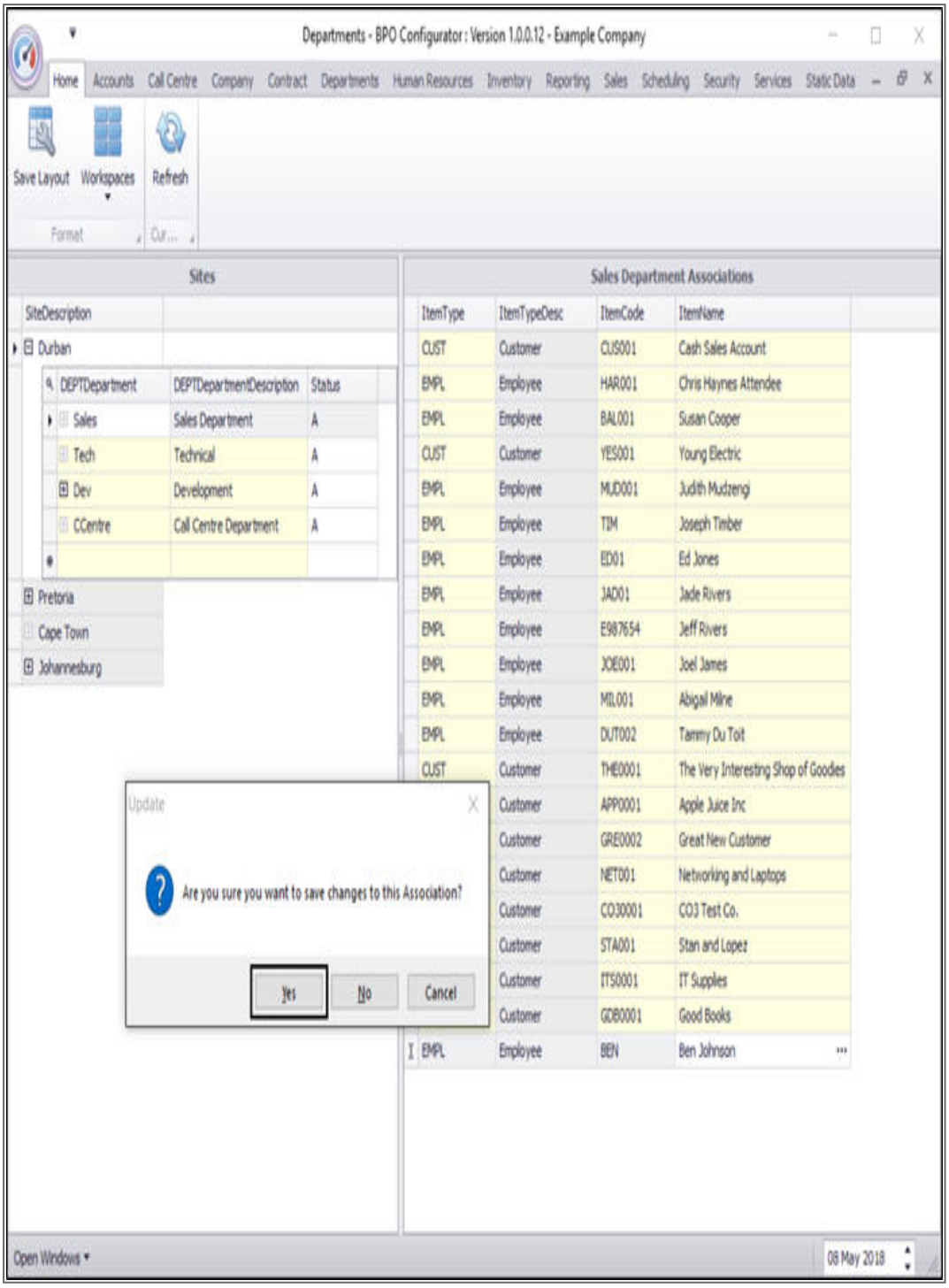


- Press ***Tab*** or ***Enter*** on you keyboard.
- An ***Update*** message box will appear asking;

CO3 Technologies (Pty) Ltd © Company Confidential

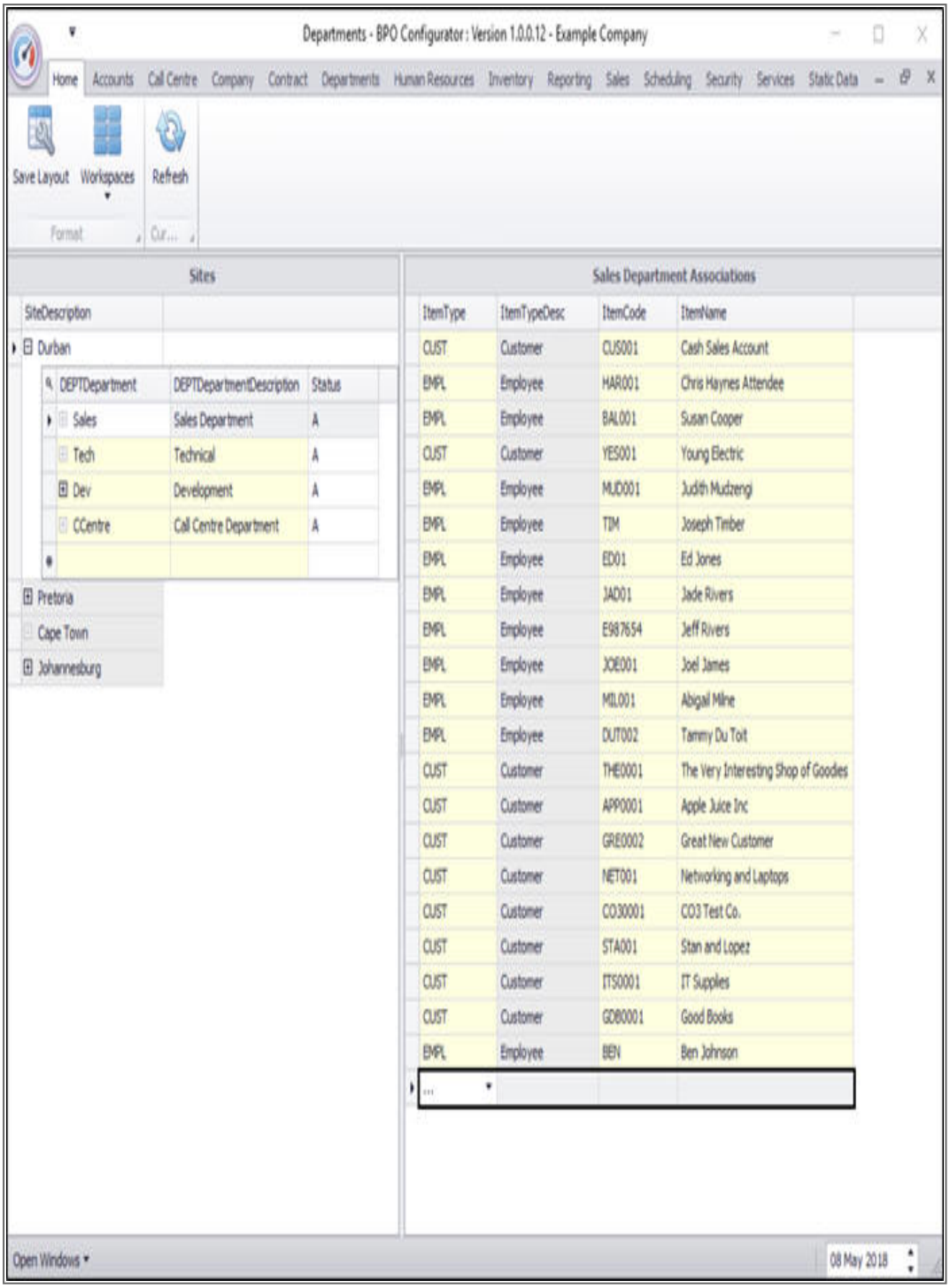
- ***Are you sure you want to save the changes to this association?***

- Click on ***Yes***.



CO3 Technologies (Pty) Ltd © Company Confidential

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

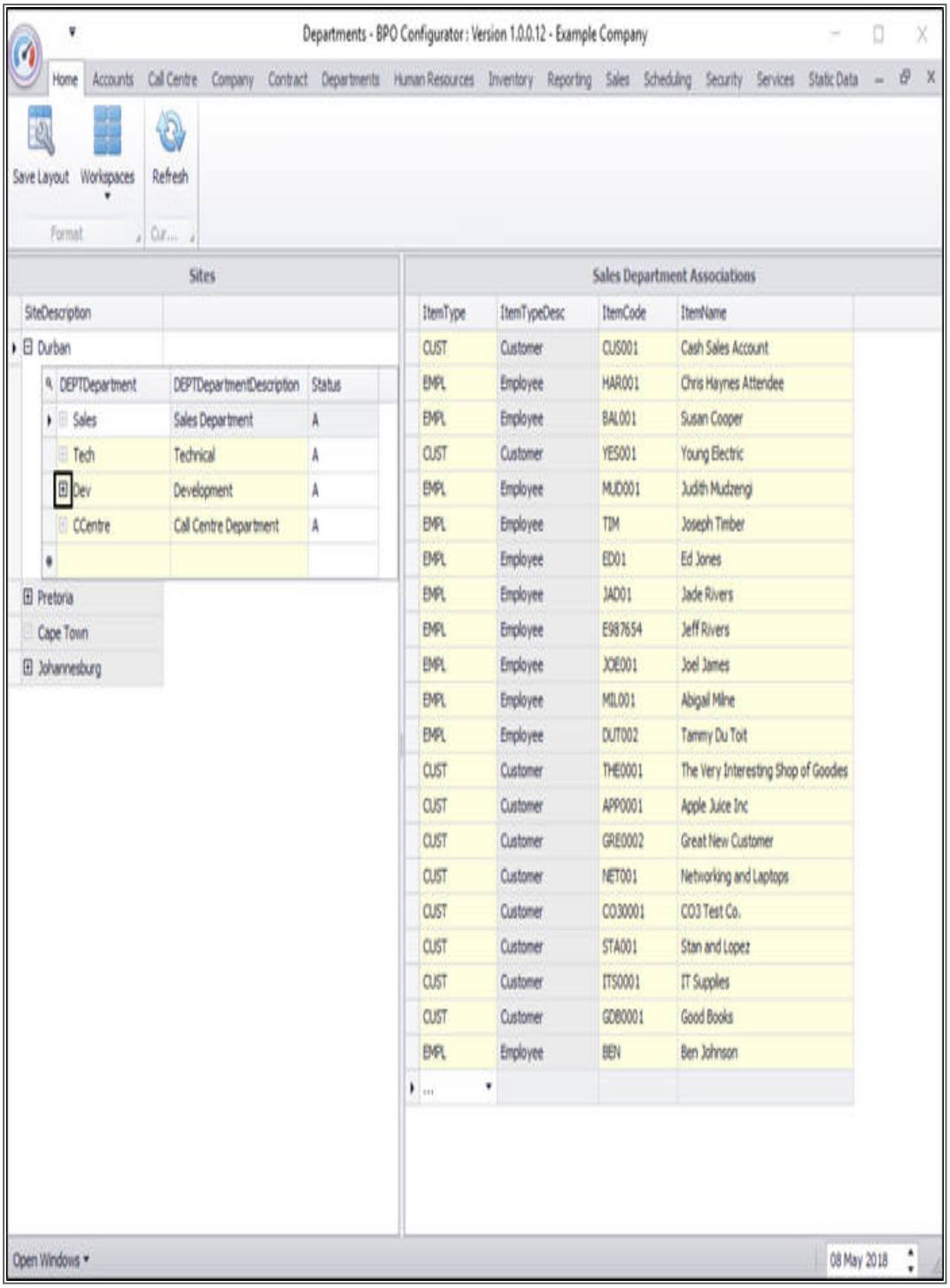


CO3 Technologies (Pty) Ltd © Company Confidential

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.

CO3 Technologies (Pty) Ltd © Company Confidential



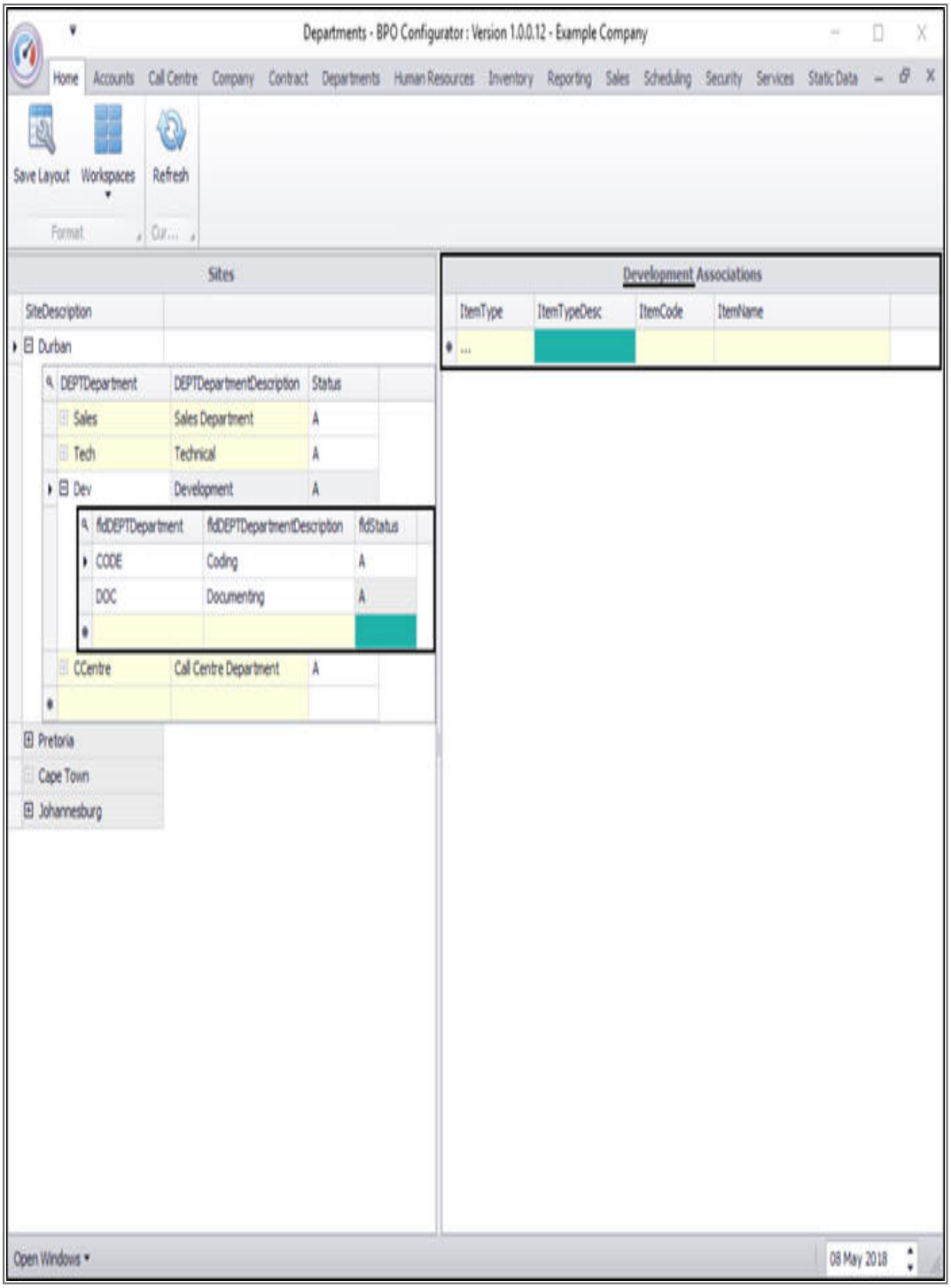
- The ***Development Department*** frame will be expanded.
- Here you can view two linked ***sub-departments:***

CO3 Technologies (Pty) Ltd © Company Confidential

- **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.

CO3 Technologies (Pty) Ltd © Company Confidential

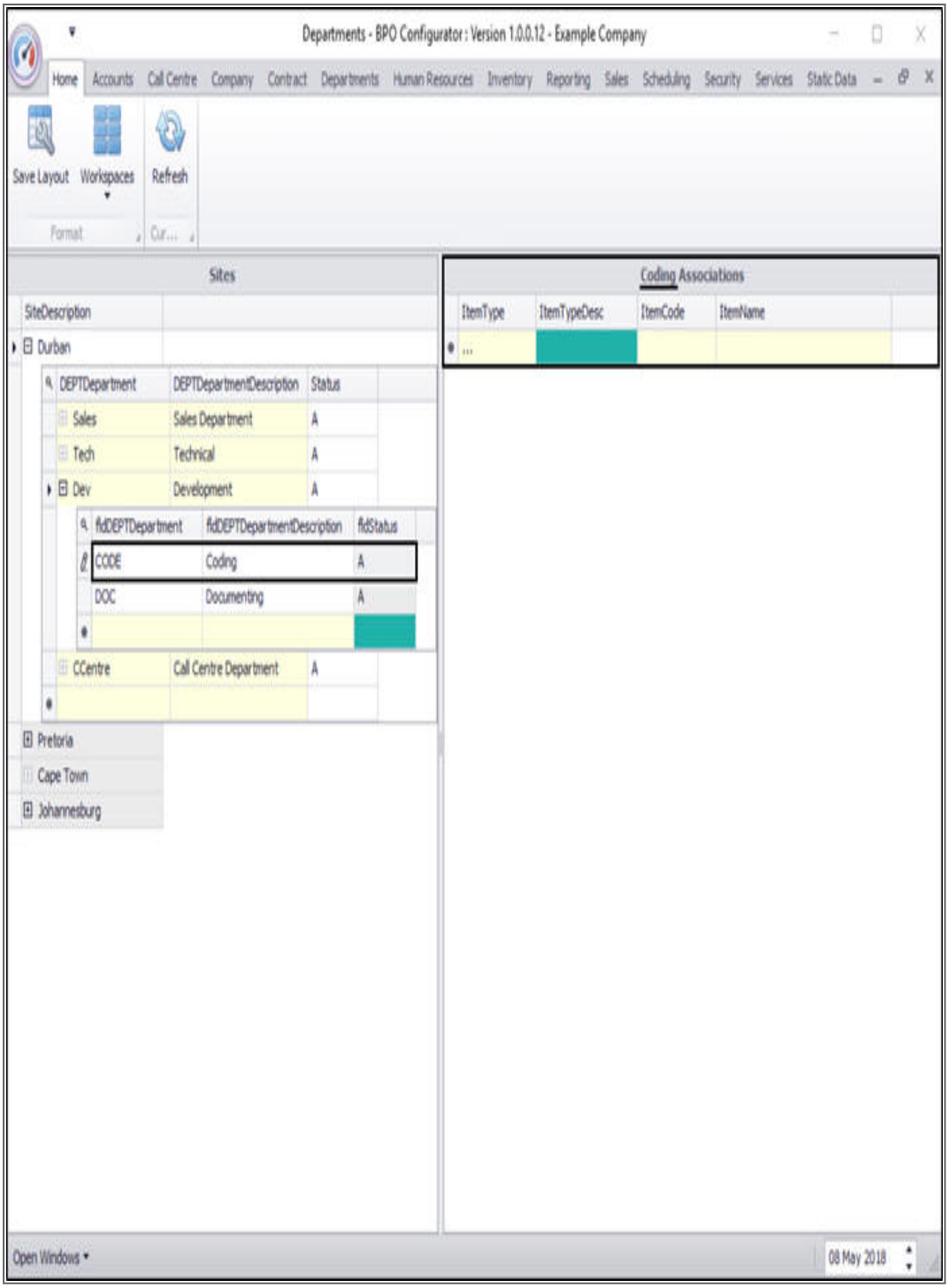


- ***Click anywhere*** in the ***row*** of one of the ***sub folders***.
  - In this image, ***Coding*** has been selected.

CO3 Technologies (Pty) Ltd © Company Confidential

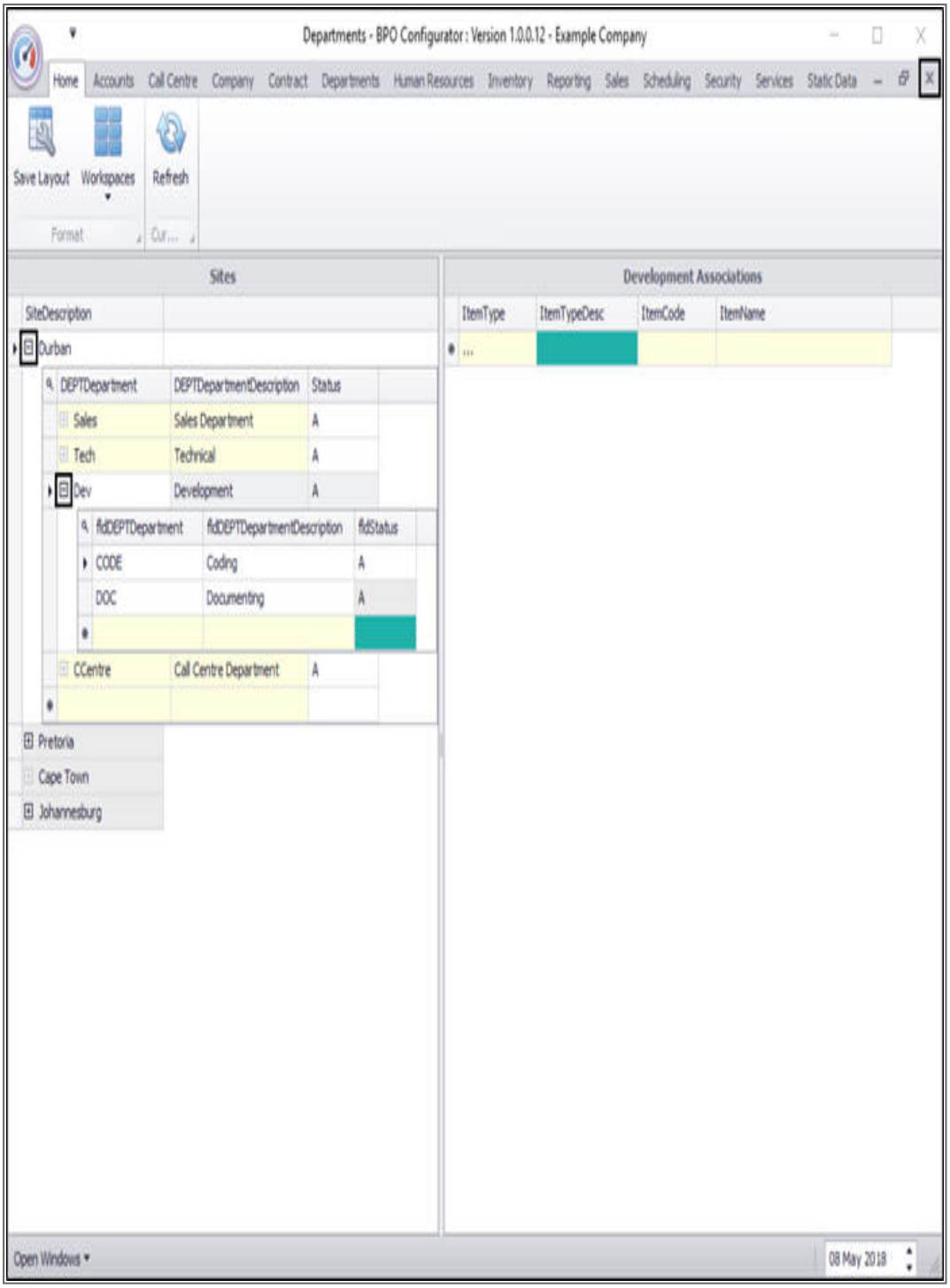
- You will see that as you clicked on the Coding Department row, the Associations frame ***title*** and ***data grid content*** changes to the correlating ***Coding*** Associations.
    - In this image, ***no*** associations have been added to this department yet.

CO3 Technologies (Pty) Ltd © Company Confidential



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

CO3 Technologies (Pty) Ltd © Company Confidential



BPO.MNU.094

CO3 Technologies (Pty) Ltd © Company Confidential