Enterprise - How to Create Branches

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Why Create a New Branch?

Within Enterprise a "branch" is defined as an individual location or line of business within an entity. Setting them up is a relatively easy endeavor.

Reason's for creating a new branch may include but are not limited to:

- Opening a new office
- Separating an existing office into different lines of business

How to Create a Branch:

Begin by navigating to All Options > Administration > Branch:

<u> </u>			No tasks to display for your curr	ent filter settings	
	Find a branch	Main Info Com	▶ tasks appointme mission Defaults	ents social e	mail + ▼ C
adjustment assessment packages attendance authorities business code types commission company custom data drop downs employers evaluations external services geoloc gl allocation restormer order asssignment contact pay / bill calendar	16 items available BranchID 0 RC Hibh Tech Fovlevel NE administration assignment attendance broadbean calendar contact contact groups contact messages customer dispatcher email employee evaluations hot lists hrcenter integrations job candidates order pay / bill paycards rate sheet reports resume parser	Active Web Public Staff Branch Name Branch Full Name Branch Parent Branch Letter Branch Address Invoicing Address Street 1 Street 2 Branch City Branch State Zip Tax State Hier Country Phone Fax	High Tech Evolved NE Address Payment Address Street1 Street2 Eagan MN S5121 MN High Tech Evolved NE United States of America 6515555555	EINC Bank AP Bank Instant Bank Contractor Bank AuthCheck Bank GLCode Business Code Burden Rate Worker com Default Worker C Calc Sales Tax by payroll optid Instant Pay Limit technical Branch Scanner II Branch Scanner T	omp MN OCIP Gross Profit So.co P Address
reports all options ►	task manager vendors worker comp	Email	test@tempworks.com		

To create a new branch, select the "+" symbol in the upper right-hand corner of the screen. Doing so will populate a new branch under the existing branch column:

Main Info Comr	nission Defaults		
Active	×		
	X		
Staff			
Branch Name			
Branch Full Nar !			
Branch Parent	· · · · · · · · · · · · · · · · · · ·		
Branch Letter			
Branch Address			
Invoicing Address			
	Format Address		
Street 1			
Street 2			
Branch City			
Branch State	v		
Zip !			
Tax State	×		
Hier			
Country	United States of America		
Phone			
Fax			
Email			
custom data			
Custom Property 1			
Custom Property 2			
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Note All required fields must be filled to save your work and to safely navigate away from this workspace.

Enter the following information:

- Active: Indicates the current status of this branch and whether it will be displayed within hierarchy selection.
- Web Public: Indicate whether the branch will be made available for selection in HRCenter.
 - This is also a pre-requisite for posting Job Orders to the Job Board. For more information on this functionality, please see the article titled Job Board Posting Options & Configurations.
- Staff: Indicate whether the branch is for staff members.

Note Marking the branch as "Staff" allows TempWorks and its partners the ability to make better decisions around how to handle data and information tied to internal staff.

For example, with the Sense integration, this means that any records in staff branches will not be synced in order to prevent your internal staff from seeing their own and their coworkers' information.

- Branch Name: Branch name as it will appear in branch selection drop downs.
- Branch Full Name: Branch name as it will appear within hierarchy wizard.
- Branch Parent: Entity that the branch belongs to.

- Branch Address: Physical location of branch or line of business.
- Branch State: State wherein the branch resides.
- Zip: Zip code where in the branch resides.
- Email: Default email or email group to which automatic emails are forwarded.
- Auto Invoice Day: A referential field for determining preferred branch invoice date

EINC !
Bank !
AP Bank
Instant Bank
Contractor Bank
AuthCheck Bank
AR Bank BankID 0 T
GLCode
Business Code
Burden Rate 1
worker comp options
Default Worker Comp !
Calc Sales Tax by Gross Profit
payroll options
Instant Pay Limit \$0.00
technical
Branch Scanner IP Address
Branch Scanner Type

- EINC: EINC associated with this branch, this will coincide with branch parent.
- Bank Fields: Default banking information which will populate throughout enterprise.

Note These dropdowns can be setup from the "GLS Bank Account Section" of administration.

- GLCode: This is used as a field to store the number or name of the branch as it is in your accounting software.
- **Default Worker Comp:** The default worker Comp code as it will populate within the customer record in enterprise.
- Calc Sales Tax by Gross Profit: This check box allows the sales tax to be based on the gross profit of the transaction rather than the total bill of the transaction. This would apply to all transactions within the branch.

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