

Beyond - Departments vs Worksites

Last Modified on 10/07/2021 3:43 pm CDT

Departments vs Worksites

Why bother taking the time to create departments and worksites for a customer when you can create orders, assignments, and invoices through one primary record? There are lots of reasons actually! Including...

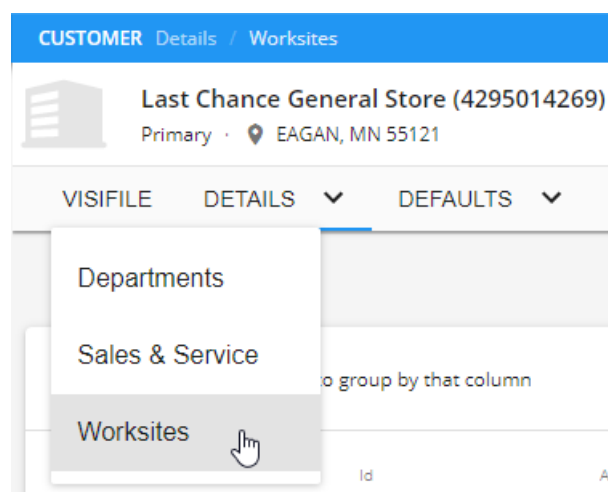
- The customer would like invoices for a particular department sent to a different location other than the billing address on the main customer record.
- The customer requires different invoicing criteria for different departments.
- Departments have different worker comp code defaults.
- The customer would like specific reporting by department.
- There are multiple branches or multiple sales teams servicing the customer.
- Customer terminology - a customer calls to place an order for the "Human Resources" department.

Also, let's look beyond the customer's needs- perhaps *you* want to track financials, gross profit, order fill ratio, etc. for different areas of the customer. That would be nearly impossible to accomplish if you were creating all orders and assignments under the same primary department.

By having departments, you are essentially creating an organizational chart for that customer where you can run reports, searches, and track metrics by individual department or for the entire customer. The list of benefits goes on and on!

How to Setup Worksites

Worksites are located under the details tab on the customer record:



All worksites for a customer will be listed here:

CUSTOMER Details / Worksites

Last Chance General Store (4295014269)
 Primary · EAGAN, MN 55121

VISIFILE DETAILS ▾ DEFAULTS ▾ DOCUMENTS INVOICE HISTORY INVOICE SETUP ▾ MORE

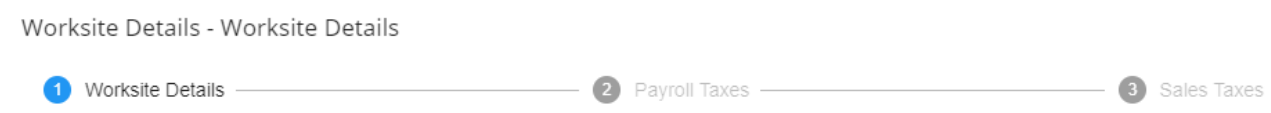
+ ADD NEW WORKSITE

Drag a column header here to group by that column

Name	Id	Active	Street 1	Street 2	City
Primary	14201	✓	3140 NEIL BLVD		EAGAN
Warehouse A	14202	✓	123 MAIN ST.		ST. PAUL

Select the **+ ADD NEW WORKSITE** button to add a new worksite to the list.

When adding a new worksite, 3 steps will need to be completed to finalize it's creation:



Configuration Alert

If you are utilizing our Address Standardization configuration for worksites, you may have an additional step to validate the address with the USPS. For more information, check out [Beyond - Address Standardization](#)

Step 1: Worksite Details

The 'Worksite Details' section lays down the foundation of what makes the worksite a specific place.

- **Worksite Name:** A unique name used to describe the location, e.g. Downtown, 2nd Street, South Shipping, etc.
- **Address Information:** The physical location of the site.

Worksite Details - Worksite Details

1 Worksite Details

2 Payroll Taxes

3 Sales Taxes

Worksite Name

Minneapolis Location

Is Active

Address

Street

123 Nowhere Lane

Street 2

City

Minneapolis

State

Minnesota

Zip Code

55404

Country

United States of America

Other Information

Time Zone

Central Standard Time

X ▾

Dress Code

Casual - no holes in jeans, no sweat pants



Observes Daylight Savings



Accessible to Public Transportation

Directions

Park in back lot. Aprons will be provided on the first day.

SAVE AS DRAFT

CANCEL

[NEXT >](#)

Other Information:

- **Time Zone:** This is relevant especially for clients that are utilizing our [TempWorks TimeClock](#) solution. From the drop-down menu, set the time zone on the worksite to the time zone that the clock is in. The "Observes Daylight Savings" box should be selected in all instances *except* for clocks that are located in Arizona and Hawaii.
- **Dress Code & Directions:** Allows users to input dress code and directional information related to the worksite. Text entered here will display/pre-fill into orders that are created for this worksite and will also post out to the WebCenter employee portal.

Worksite Details - Worksite Details

1 Worksite Details

2 Address Standardization

3 Payroll Taxes

4 Sales Taxes

Worksite Name

Forest Lake Yard

Address

Street

221 Gresham Way

Street 2

City

Forest Lake

State

Minnesota

Zip Code

55025

Country

United States of America

Other Information

Time Zone

Central Standard Time



Dress Code

Outdoor Work attire, Heavy boots (steel toed)



Observes Daylight Savings



Accessible to Public Transportation

Directions

Park in South Lot

SAVE AS DRAFT

CANCEL

NEXT >

Step 2: Payroll Taxes

Beyond utilizes the zip code that was entered within the *worksite details* step of the wizard to determine local tax profiles (state, city, school district, county, etc.). As long as the worksite selected *on the order* is accurate, payroll taxes will be as well.

Worksite Details - Payroll Taxes

Worksite Details 2 Payroll Taxes 3 Sales Taxes

Please select a local tax profile from the menu below:

	City	City Juris	School District	School Juris	County	County Juris
<input checked="" type="checkbox"/>	Minneapolis				Hennepin	

City Tax Exempt

School Tax Exempt

County Tax Exempt

SAVE AS DRAFT

CANCEL [< PREVIOUS](#) [NEXT >](#)

Select the box next to the correct City/County from the list & use the boxes at the bottom if the location is exempt from any set of taxes. Select Next to continue.

Note For Worksites within the state of Pennsylvania, a PSD Code will need to be selected when creating the Worksite:

Worksite Details - Payroll Taxes

Worksite Details 2 Payroll Taxes 3 Sales Taxes

* PSD Code

City Tax Exempt

School Tax Exempt

Local Service Tax

SAVE AS DRAFT CANCEL [< PREVIOUS](#) [NEXT >](#)

Once the PSD Code has been selected for the Worksite, the City and School Tax fields will be unable to be edited:

Worksite Details - Payroll Taxes

Worksite Details
 Payroll Taxes
 Sales Taxes

* PSD Code
030201 ARMSTRONG TAX COLLECTION DISTRICT

City Tax
XPAA165390 APPLEWOLD 0.5% 1% Exempt

School Tax
YPAAP13085 Armstrong Sd 0.5% 0.5% Exempt

Local Service Tax

SAVE AS DRAFT CANCEL < PREVIOUS NEXT >

Step 3: Sales Tax

Typically, sales tax is location specific, meaning it should be applied based on where the employee works.

Worksite Details - Sales Taxes

Worksite Details
 Payroll Taxes
 Sales Taxes

Select A Sales Tax Jurisdiction To Add

Please Select a Sales Tax Jurisdiction

Do Not Set Up Sales Tax for this Worksite
Please select at least one sales tax jurisdiction or opt not to set up sales taxes

SAVE AS DRAFT CANCEL < PREVIOUS SUBMIT

Note Not all states require sales tax on staffing services. Please consult your tax professional for specific information for your location.

If you are in a situation where it would be appropriate to add sales tax, from the 'Select A Sales Tax Jurisdiction To Add' drop-down, simply select the matching jurisdiction:

Worksite Details - Sales Taxes

Worksite Details Payroll Taxes Sales Taxes

Select A Sales Tax Jurisdiction To Add

Jurisdiction	Description	Goods Tax	Services Tax
MN-Minneapolis	City of Minneapolis - MN	8.025%	8.025%

If you do not want sales tax to apply to the worksite, select the checkbox at the bottom:

Do Not Set Up Sales Tax for this Worksite

Select Submit to save your worksite.

Once you have saved your worksite, you will be brought to the details of the worksite:

CUSTOMER Details / Worksites / Minneapolis Location

Last Chance General Store (4295014269)
Primary · EAGAN, MN 55121

VISIFILE DETAILS ▾ DEFAULTS ▾ DOCUMENTS INVOICE HISTORY INVOICE SETUP ▾ MORE

Worksite Details

Worksite Name	Minneapolis Location	Active	Yes
Address	123 Nowhere Lane Minneapolis, MN 55404 United States of America	County	Hennepin
School District	--	Directions	Park in back lot. Aprons will b...
Dress Code	Casual - no holes in jeans, no s...	Time Zone	Central Standard Time
Observes Daylight Savings	Yes	Accessible to Public Transportation	No

Punch Locations

No punch locations

Payroll Tax

Exempt	No
--------	----

Select details > worksites to return to the list.

Creating Customer Departments

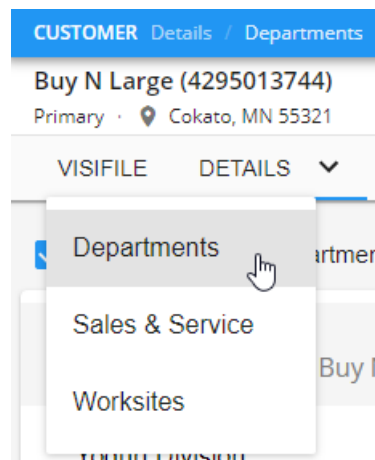
Departments help create a hierarchy within the customer record. Departments are a great option when customers need separate billing information or for tracking separate sales and reporting for different branches of a customer.

Things to Know About Departments:

- There are no limits to the number of levels (departments) that can exist within a customer record. When dealing with departments, the terms 'primary' and 'root' are interchangeable. The primary/root record is always at the top of the customer tree.
- When creating a department, the department record will inherit all of the properties of the parent record (i.e. the customer record that exists one level above and they can be modified at each department level). Remember, creating a department creates an additional customer record underneath the customer record that is currently selected/in view. Keep in mind that the customer hierarchy as a whole is your organizational chart. All data entered at the primary level will flow into departments that are created but can be modified at each department level.
- If departments have been created for a customer, it is unlikely that orders would/should be created under the primary customer record.
- Changes to a primary customer record will not be reflected in departments which already exist for that customer.

How to Setup Departments:

Begin by navigating to the 'Departments' sub-tab within the customer's 'DETAILS' tab:



Select '+ NEW DEPARTMENT' button:

CUSTOMER Details / Departments

Buy N Large (4295013744)
Primary · Cokato, MN 55321

VISIFILE DETAILS ▾ DEFAULTS ▾ DOCUMENTS INVOICE HISTORY INVOICE SETUP ▾ MORE

Include inactive departments + NEW DEPARTMENT

Primary
Active Current Customer Buy N Large

- Yogurt Division
Active Buy N Large
- Space Technology & Services
Active Buy N Large
- Marketing
Inactive Buy N Large
- Electric
Active Buy N Large

A 'Customer Department' wizard will appear. Enter in the name of the department and assign a default worksite to that department (this can be edited later and a worksite can be added immediately using the '+' button).

Customer Department

Department Name	Default Worksite
Grocery	Grocery store
	1605 Grand Ave
	Saint Paul, MN 55105
	+ +

SAVE AS DRAFT

CANCEL SUBMIT

- **Department Name:** Should generally describe the type of work/positions within the department- such as Manufacturing, Legal, Payroll, etc.
- **Selected Worksite:** The actual physical location where the department is located and where employees will be sent to work. It is crucial that the selected worksite and worksite information is accurate as this address information is used in determining what taxes should be applied to the employee's paycheck. If the department is located at an address/worksite not currently listed in the table, simply select the '+' icon to add a new worksite.

Reviewing the Updates Customer Hierarchy and Department Record

Following our example, within the 'departments' tab of the customer record we now see the 'Grocery' department:

CUSTOMER Details / Departments

Buy N Large (4295013744)
Primary · Cokato, MN 55321

VISIFILE DETAILS **DETAILS** DEFAULTS DOCUMENTS INVOICE HISTORY INVOICE SETUP MESSAGES CUSTOM DATA

Include inactive departments

Primary
Active Current Customer Buy N Large

Yogurt Division
Active Buy N Large

Space Technology & Services
Active Buy N Large

Marketing
Inactive Buy N Large

Electric
Active Buy N Large

Grocery
Active Buy N Large

To navigate to the department, simply select it with your cursor. The Department you are currently viewing will be displayed under the customer name:

Buy N Large (4295014402)
Grocery Cokato, MN 55321

VISIFILE DETAILS **DETAILS** DEFAULTS DOCUMENTS INVOICE HISTORY INVOICE SETUP MESSAGES CUSTOM DATA

^ Contacts
No contacts

^ Note
Don't call Jim on Fridays- usually at the cabin

^ Snapshot

Last Payment	5/9/2019	YTD Sales	0.00
AR Balance	0.00	Lifetime Sales	0.00
Status	Active		

^ Addresses

Primary Address	123 Main St. Cokato, MN 55321 United States of America	Billing Address	123 Main St. Cokato, MN 55321 United States of America
Default Worksite: Grocery store	1605 Grand Ave Saint Paul, MN 55105 United States of America		

Note Reminder that the default worksite is important because whenever a new order is created for a customer/department, the order worksite will default to the department's default worksite.

Department Specific Items to Consider Setting Up

Now that you have created the department record, consider the following to help customize the department information.

- **Contacts:** Who is the supervisor for *this department*? Who calls out the order requests for *this department*? These questions are answered by setting up contacts (via the visifile) and dividing out contact roles (via the details page).
- **Interest Codes (via the details section):** What unique skill sets and qualifications does this department typically look for in its employees? For example, if you were creating a clerical department, maybe they routinely seek candidates with data entry and Microsoft Excel experience.
- **Defaults (via the details section):**
 - **Multiplier Codes:** Does the new department have a uniquely different markup compared to the parent department? If it does, be sure to save a new multiplier code.
 - **Shifts:** Does the new department have different start times compared to other departments in the same customer? If yes, waste no time in saving the new shift information.
 - **Worker Comp Codes:** What *type* of work will be done through this department? Establish specific worker comp codes so that your orders, assignments, and reports are correct.
- **Invoice Setup:** If this department has unique invoicing rules, such as billing schedule (weekly, bi-weekly, monthly), style, the invoice recipients, etc., be sure to establish these setting within the billing setup and credit and payroll section of invoice setup.

Related Articles