

# Enterprise - How to Setup and Manage Business Codes

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## What are Business Codes?

Business Code is found on the customer record and helps your sales and management teams organize and group customers by their industry or type of employee they are looking to staff for. Business codes are easy to search by in Enterprise or Beyond.

The screenshot displays the Enterprise software interface for a customer record. The header shows the customer name 'Trees & Leaves (Primary)' and contact information: 123 Leaf St, Shorewood, MN 55331, (456) 123-1036. The account ID is 4295013638 and the branch is New Brighton. The interface includes a navigation menu on the left with categories like 'visifile', 'details', 'sales & service', 'employee', and 'customer'. The main content area is divided into 'sales information' and 'sales pipeline'. The 'Business Code' field is highlighted, and a dropdown menu is open, showing a list of business codes and their descriptions. The dropdown menu has the following data:

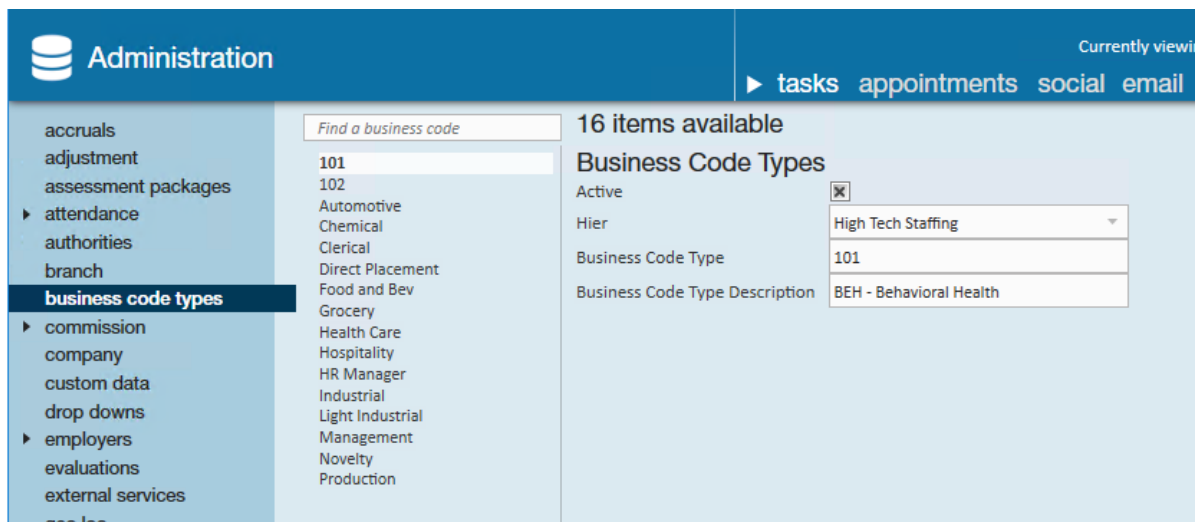
BusinessCode	Description
Automotive	
Grocery	
Light Industrial	All production and machine operator positions
101	BEH - Behavioral Health
Novelty	Business not traditionally represented
Chemical	Chemical development and production
Clerical	Clerical
Direct Placement	Direct Placement
102	EDU - Education
Health Care	Health Care
Hospitality	Hospitality
Industrial	Industrial
Production	Production
Food and Bev	Restaurants, Bars

For more information on business code, check out [Beyond - Managing Sales and Service](#) or [Enterprise - Managing Sales and Service](#).

## How to Add a Business Code

**\*Note\*** Before you start adding business code types, we recommend being at the highest Hierarchy you have available (whether that is entity, subsystem, or system) to ensure you have access to edit and see all options in administration.

1. Navigate to all options > administration
2. Select business code type



The screenshot shows the 'Administration' interface. The left sidebar contains a list of options, with 'business code types' highlighted. The main content area is titled '16 items available' and 'Business Code Types'. It features a search bar 'Find a business code' with '101' entered. Below the search bar is a list of categories: Automotive, Chemical, Clerical, Direct Placement, Food and Bev, Grocery, Health Care, Hospitality, HR Manager, Industrial, Light Industrial, Management, Novelty, and Production. The '101' category is selected. To the right, there are fields for 'Active' (checked), 'Hier' (set to 'High Tech Staffing'), 'Business Code Type' (set to '101'), and 'Business Code Type Description' (set to 'BEH - Behavioral Health').

3. Select the + in the upper right
4. Enter/review the following information:
  - **Active:** This checkbox should remain checked. Only active business codes can be selected on a file
  - **Hier:** Determines where the business code will exist and be accessible in your database. If this code is only applicable to one branch, then you can set it to that branch.
    - Most of the time, we recommend keeping business codes at the highest level (for example: system, subsystem, or entity) to ensure all users can utilize it.
  - **Business Code Type:** The name of the business code as you want it to appear

to your service reps on records and in searches

- **Business Cod Type Description:** Short description of when this business code type should be used. Will be shown to service reps.

5. Select Save 

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