

# Enterprise - Departments

Last Modified on 03/26/2020 9:51 am CDT

## Why Create Departments?

Departments help create divisions in larger customers that you work for which allows you to pull separate reporting, billing, and more! This option also allows you to document a company structure/hierarchy. Departments may not be used with every customer but can be extremely helpful depending on the situation.

[Departments vs. Worksites](#) from [TempWorks Software](#) on [Vimeo](#).

Check out [Enterprise - Worksites](#) for more information.

## How to Create a Department

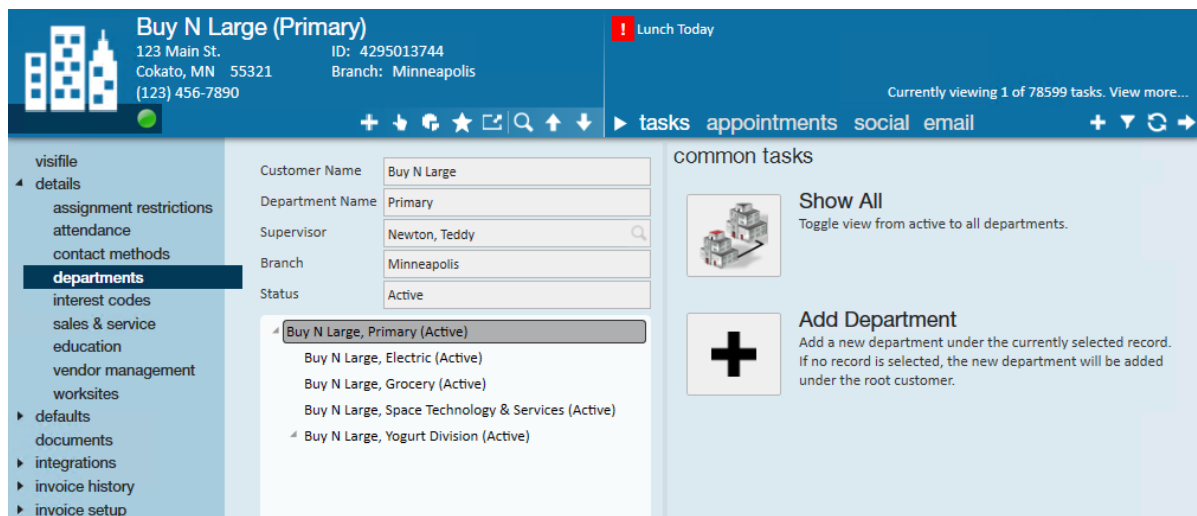
### Before you Create a Department

- If you are creating multiple departments for a customer, we recommend first drawing out the structure that you want to help you while you are creating.
- There is no limit 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

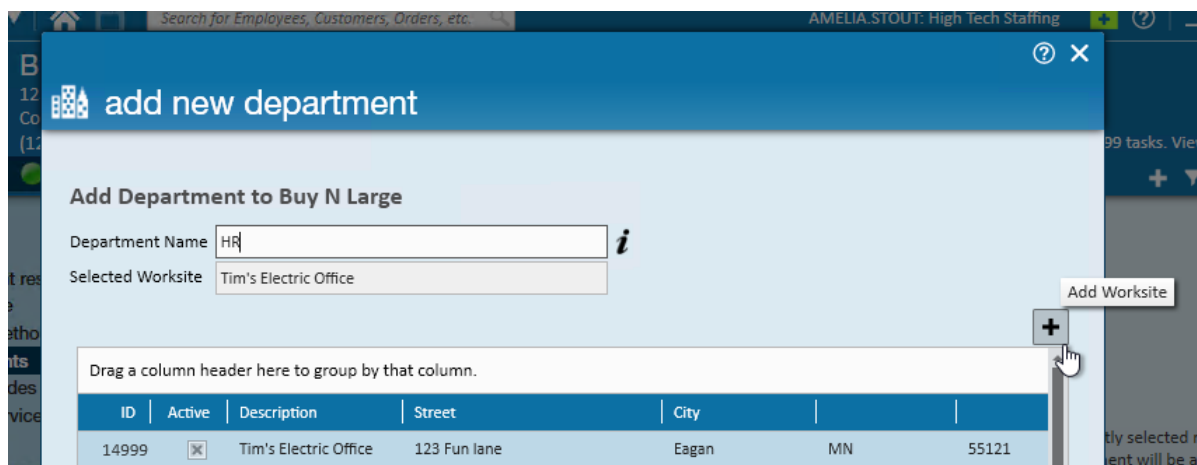
already exist for that customer.

## Creating a Department:

1. Navigate to the customer (or department record) you would like to create a department under
2. Select Details > Departments on the left



3. Choose the Add Department Option
4. Name the New Department (ex. HR, Warehouse, etc.)



5. Select a Worksite
  1. This will be set as the default worksite for the new department
  2. If none of the worksites listed are the address you want, use the + to add a new worksite
6. Select Save

## 7. You will be brought to the Customer Details page of the new Department

The screenshot shows the 'Customer Details' page for 'Buy N Large (HR)'. The header includes the company name, address (123 Main St., Cokato, MN 55321), ID (4295015157), Parent ID (4295013744), and Branch (Minneapolis). A notification for 'Lunch Today' is visible. The main content area is divided into several sections: 'customer information' (Customer Name, Department, Customer ID, Parent ID), 'customer status' (Status, Activation Date, Date Created), 'contact information' (Street, City, State, Zip, Country), 'billing address' (Attention To, Street, City, State, Zip, Country), 'contact roles' (No Records Found), 'sales tax' (No Records Found), and 'default worksite' (Pittsburg, 3805 Forbes Ave, Pittsburgh, PA 15213). A left sidebar contains navigation options like 'details', 'employee', 'customer', and 'order'.

## Recognizing a Department

How do I tell what department I am on?

First, take a look at the avatar section of the customer record:

This close-up shows the header of the customer record. The customer name 'Buy N Large' is followed by the department name '(HR)' in parentheses. Below the name is the address '123 Main St., Cokato, MN 55321'. To the right, the ID '4295015157', Parent ID '4295013744', and Branch 'Minneapolis' are listed. The department name '(HR)' and the Parent ID are highlighted with red boxes.

- The department name will be listed in () after the customer name
- The Parent ID will be the primary record's ID which is different from the ID for this department

Review the department Hierarchy for a customer:

- On the primary, navigate to details > departments to see the current structure of the departments
- Double click on any department to be navigated to that record
- Some departments might be located under another department
- Use the Show All toggle button to see all departments vs. only active ones

## Next Steps

Now that you've created a department record, you may still have some more work to do. Here is our checklist of things to consider adding/updating on the new Department record:

- **Department Record Status:** Departments, just like customer records, can have different statuses (prospect, credit check, active). You will need to set the department record to active in order to fill job orders for that department. Check out [Enterprise - Default Customer Statuses](#) for more information.

customer status	
Status	P Prospect
Activation Date	7/11/2018
Date Created	3/26/2020 8:29:00 AM

- **Contact and Billing Address:** These addresses are located on the details page of the customer record. Consider updating these if billing needs to be sent to a different location, etc.

contact information	✓ billing address
Street: 123 Main St.	Attention To: [ ]
Street 2: [ ]	Street: 123 Main St.
City: Cokato	Street 2: [ ]
State: MN Zip: 55321-____	City: Cokato
Country: United States of America	State: MN Zip: 55321-____
Website: [ ]	Country: United States of America

- **Customer Defaults:** Multiplier codes, shifts, and worker comp codes might be different for this department. Consider reviewing and revising the list of defaults for this Department. Check out [Enterprise - How to Set up Customer Defaults](#) for more information.

**Buy N Large (HR)**

123 Main St.  
Cokato, MN 55321

ID: 4295015157  
Parent ID : 4295013744  
Branch: Minneapolis

! Lunch Today

Currently viewing 1 of

+ ↔ 🏠 ★ 🔍 ↑ ↓

▶ tasks appointments social email

- visifile
- ▶ details
- 4 defaults**
- asg allocations
- people net
- rate sheet
- documents
- ▶ integrations
- ▶ invoice history
- ▶ invoice setup
- ▶ evaluations
- messages
- payment history
- tasks
- search

Accruals (0)

Multiplier Codes (5)

Required Documents (0)

**Shifts (8)**

Worker Comp Codes (0)

Job Descriptions (0)

**shifts**

Use Customer Specific Settings

Apply Shifts to Departments

Shift	Start	End	Default Set By
Green	8:00 AM	3:00 PM	Customer
Daily	6:00 AM	2:00 PM	Customer
PM Weekday	2:00 PM	11:00 P...	Customer
Graveyard	4:00 AM	6:00 PM	Customer
WKND 10 hr	8:00 AM	6:00 PM	Customer
AM Weekday	5:00 AM	2:00 PM	Customer
WKND OVRN	10:30 P...	10:30...	Customer
AM shift	8:00 AM	4:00 PM	Customer

- **Contacts:** This department probably has a few contacts than the other department. Consider updating and adding contacts for this department. Check out [Enterprise - How to Add a Contact](#) for more information.

