

## 12R8 Enterprise Customer Departments Setup

Enterprise **Customer Department** hierarchy set up allows for unlimited flexibility in tracking commissions, **Invoicing** requirements, and **Department Order** defaults. This help document explains the role of **Departments** in the **Customer** record and gives examples of common **Customer** hierarchies needed to fulfill the client's **Invoicing** and **Reporting** needs.

The **Departments** form is found within the **Customer Details** section. The terms **Department**, **Child Customer** and **Division** are interchangeable as they pertain to the **Customer** Hierarchy. There are a number of reasons why it would be important to create a **Department** for a **Customer**:

- ❑ The **Customer** would like **Invoices** for a particular **Department** sent to a different location than the **Billing Address** on the main **Customer** record.
- ❑ The **Customer** requires different **Invoicing** criteria for different **Departments**.
- ❑ The **Department** has a different **Worker Comp** code default.
- ❑ The **Customer** would like specific **Reporting** by **Department**.
- ❑ There are 2 **Branches** or 2 **Sales Teams** servicing the **Customer**.
- ❑ **Customer** terminology – a **Customer** calls to place an order for the "Human Resources" **Department**.

There is no limit to the number of levels within a **Customer** record. The **Primary** record is always at the top of the **Customer** tree. A **Parent** record refers to the **Department** (or **Sub-Department**) that is one level up in the **Customer** hierarchy. When creating a **Department**, the **Department** record will inherit all of the properties of the **Parent** record, and they can be modified at each **Department** level. All data entered at the **Primary** level can be entered or modified at each **Department** level.



**\*Note - If *Departments* have been created for a **Customer**, it is unlikely that **Orders** would be created under the **Primary Customer** record.**

The screenshot displays the 'Crom Equipment' customer record in the TempWorks software. On the left, a sidebar lists navigation options: 'visifile details', 'departments' (highlighted with a red circle), 'methods', 'sales & service', 'interest codes', 'assignment restrictions', 'vendor management', and 'invoicing'. The main area shows customer details: Customer Name (Crom Equipment), Department Name (Primary), Supervisor (Holcomb, Jim), Branch (Memphis SE), and Status (Active). Below this is a tree view of departments: 'Crom Equipment, Primary (Active)' is expanded, showing sub-departments: 'CER Company, Corp (Active)', 'Crom Equipment, Warehouse (Active)', 'Crom Equipment, Receiving (Active)', 'Crom Equipment, Shipping (Active)', and 'Crom Equipment, Accounting (Active)'. On the right, a 'common tasks' panel includes 'Show All' (Toggle view from active to all departments) and 'Add Department' (Add a new department under the currently selected record. If no record is selected, the new department will be added under the root customer).

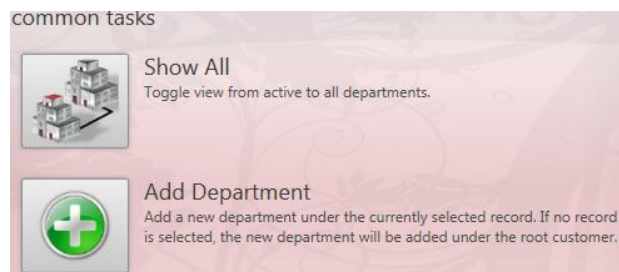
Customer Name	Crom Equipment
Department Name	Primary
Supervisor	Holcomb, Jim
Branch	Memphis SE
Status	Active

- └ Crom Equipment, Primary (Active)
  - └ CER Company, Corp (Active)
    - └ Crom Equipment, Warehouse (Active)
  - └ Crom Equipment, Accounting (Active)
    - └ Crom Equipment, New Department (Active)
  - └ Crom Equipment, Clerical (Active)
    - └ Crom Equipment, Accounts Receivable (Active)
      - └ Crom Equipment, Corporate (Active)
      - └ Crom Equipment, Taxes (Active)
  - └ Crom Equipment, Customer Service (Active)
  - └ Crom Equipment, Human Resources (Active)
  - └ Crom Equipment, North Warehouse (Active)
  - └ Crom Equipment, Welding (Active)

In the middle of the *Departments* form it displays the information shown left. The *Department* record you currently have open for the **Customer** will be highlighted when you open this form. It will also list the **Contact** who has been listed as the default *Supervisor* for the **Customer**. This section displays the *Branch* associated with the record and the current *Status*.

Below that is a picture of the **Customer** tree. To minimize any part of the tree click on the  button on the left or click on the  button to expand and display more *Department* information.

In the Common Tasks section you can change the **Customer** tree view so that it only displays "Active" *Departments* or click on *Show All* to display all "Active" and "Inactive" *Departments* within the **Customer** hierarchy.



*\*Note - When you click on Show All the button will change to Show Active Only. Click on the button to revert the display to only those Departments with a Status of "Active".*

### Creating Department Records

To add a new **Customer Department**, click on the *Add Department* button. The following window will be displayed:

The screenshot shows a dialog box titled 'add new department' with a close button (X) in the top right. Inside the dialog, it says 'Adding Department to Crom Equipment'. There is a text input field labeled 'Department name' with a blue information icon to its right. At the bottom right of the dialog, there is a 'Save' button with a floppy disk icon.

Add the new *Department* name (ie. "Warehouse", "Human Resources", "Nursing", etc.) in the *Department Name* field, then click on *Save* to add and open the *Department* record.

*\*Note – Make sure that the correct Department record is highlighted before opening the Add New Department form, or the Department will be added at the wrong level of the hierarchy tree. If this happens the only way to fix it is to change the new Department Status to "Deleted/Mistakenly Entered" on the Details form and then re-add the Department at the correct level.*

## Customer Hierarchy Examples:

### Basic Default Set up

The simplest example of **Customer** hierarchy is the Basic Default. The Basic Default is the **Customer** hierarchy that is created when a new **Customer** record is added. This set up has one *Department* record, listed as *Primary*. The Basic Default would be used if only one *Sales Team* or *Branch* is needed for sales tracking, there is only one *Billing Address* where the **Invoices** need to be sent, all of the billable *Transactions* can be sent on one **Invoice** for the week and all of the **Customer's** WebCenter users should be able to see all information for their company (ie. **Reports, Invoices, Orders, etc.**).

To the right is how the **Customer** tree will look if the *Primary* account is the only *Department*. This **Customer** most likely only has one *Worksite* and one *Worker Comp* code being used for **Orders**.

Solar Impact Inc.  
Primary  
7580 Galaxie Ave.  
Apple Valley, MN 55124  
(584) 738-4938

visifile details  
contact methods  
▶ departments  
worksites  
sales & service  
interest codes

+ New Customer Search Actions Reports

Customer Name Solar Impact Inc.  
Department Name Primary  
Supervisor  
Branch Memphis SE  
Status Active

Solar Impact Inc., Primary (Active)

Solar Impact Inc.  
Primary  
7580 Galaxie Ave.  
Apple Valley, MN 55124  
(584) 738-4938

visifile details  
invoicing defaults  
messages documents  
search

+ New Customer Search Actions Reports Favorites

customer snapshot

Customer Name Solar Impact Inc. Customer ID 779837 Branch Memphis SE Status Active  
Parent ID Root ID 779837 Notes  
Customer Tree Master View

financials

Last Payment		YTD Sales	\$0.00
Balance Due	\$0.00	Lifetime Sales	\$0.00
AR Balance	\$0.00	Sales Trailing	\$0.00
Credit Limit	\$0.00		

contacts

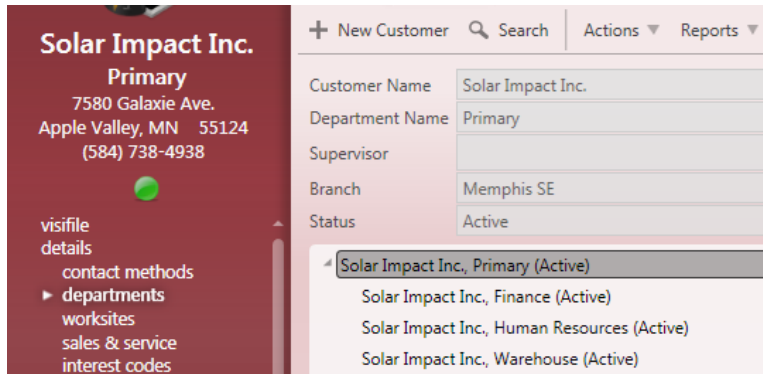
Name	Title	Office Phone
Arnold, Alisha	CEO	(651) 809-3948
Linton, Kylie	Receptionist	(698) 383-4775
Taylor, John	Director of Human...	(695) 828-3857

From the **Visifile** (as shown above), the *Parent ID* field will be blank because the *Primary* is the highest *Department* in the **Customer** tree and the *Customer ID* and *Root ID* will be the same. Also, the *Master View* and *Account View Visifile* screens will display the same information because there is only one level of hierarchy.

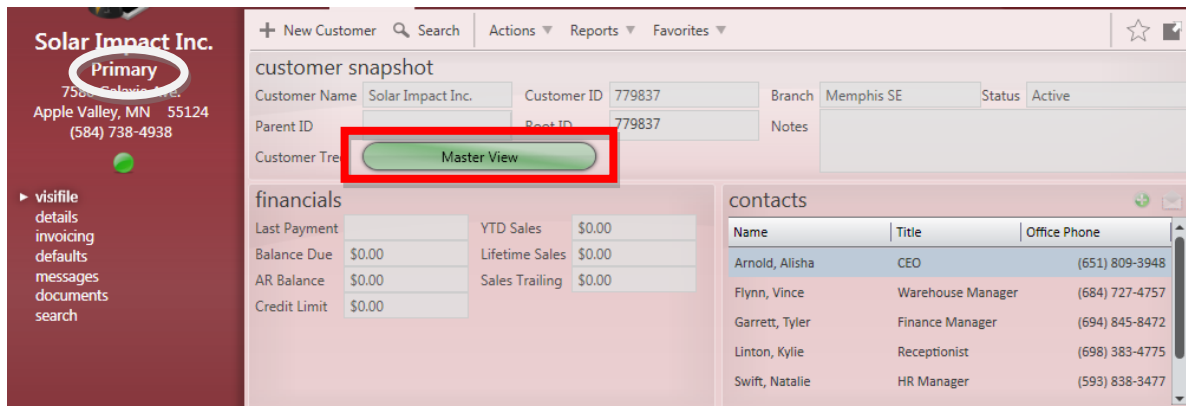
\*Note – All of the **Orders** and **Assignments** will be created for the *Primary* record and can be viewed by using the *View Orders* and *View Assignments* shortcuts from the *Actions* drop down menu.

## 1<sup>st</sup> Level Department Setup

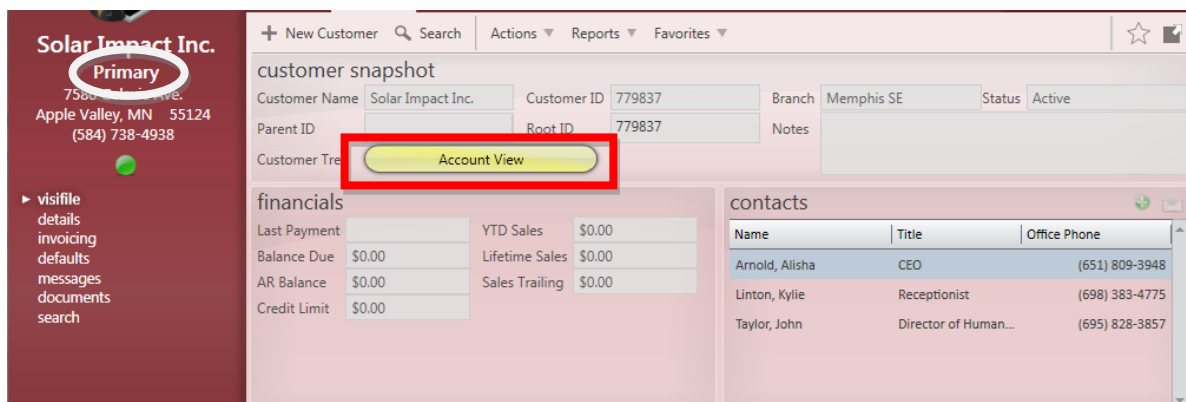
Adding *Department* records in Enterprise increases the flexibility you have for setting up **Order** defaults, tracking sales and commissions, as well as customizing **Customer Invoice** requirements. The next example contains three different *Department* records. Each *Department* record can have a different default *Worksite* and *Worker Comp* code. They can have different *Billing Addresses*, *Branches*, *Sales Teams*, and *Account Managers*. Setting up **Contacts** at the *Department* level allows for WebCenter security so that a **Contact** can only see the **Orders**, **Invoices**, **Reports**, etc. for the *Department* record that they're associated with.



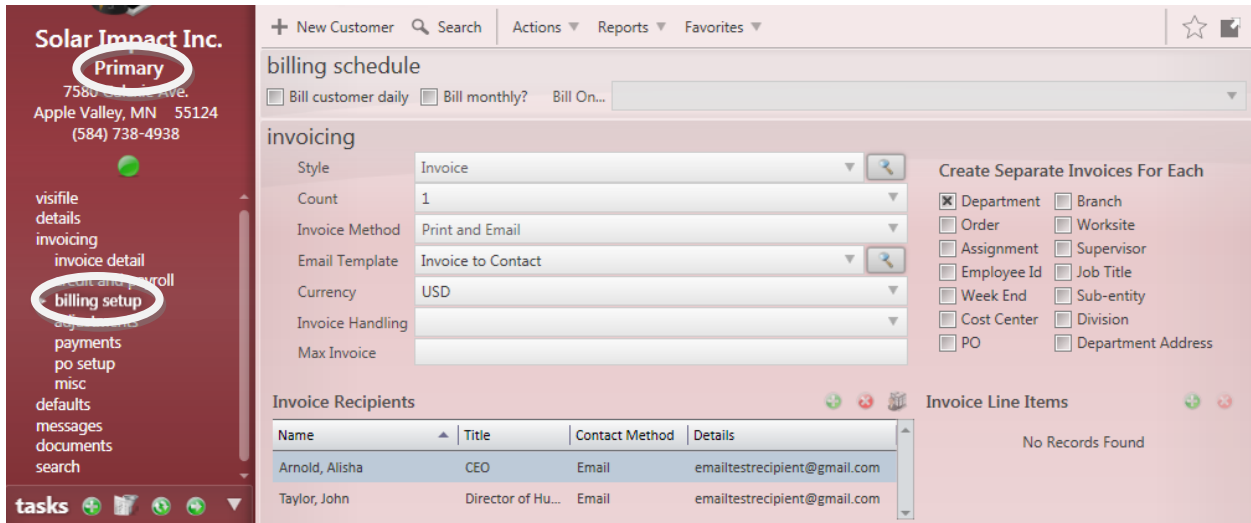
To the left is how the **Customer** tree will look if the **Customer** has a *Primary* account and three first-level *Department* records. The *Department* records are named "Finance", "Human Resources", and "Warehouse". Each of the *Departments* inherits the settings from the *Primary* account.



The **Visifile Master View** on the *Primary* record will show all of the **Contacts** for the **Customer**, all *Messages*, and all Financials no matter what *Department* record they are associated with.

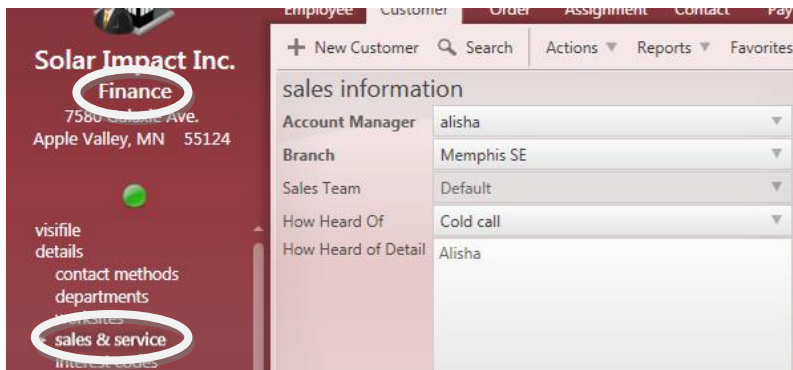


The **Visifile Account View** for the *Primary* record will show only those **Contacts**, *Messages*, and Financial detail for the *Primary* record. Click on the *Account View* button to toggle back to the *Master View*.



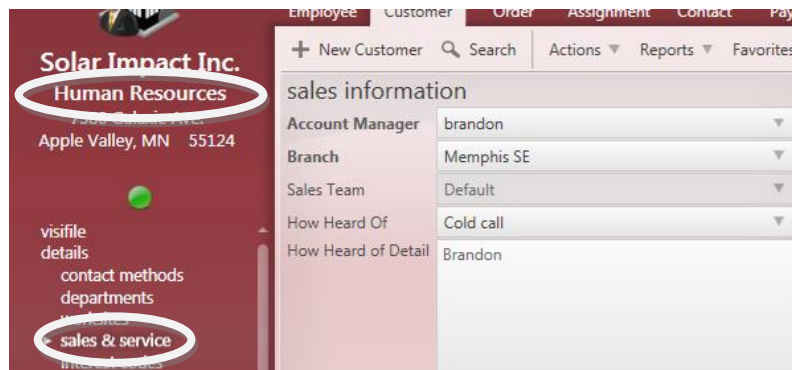
In the **Billing Setup** form of the **Primary** record (shown above) the **Invoicing** has been set up so that the **Invoice** will be printed and **Emailed**. One **Invoice** will be created for each of the **Department** records because the **Department** box in the Create Separate Invoices for Each section is selected. The two **Contacts** at the bottom will be the recipients of the **Emailed Invoices** created for each **Department**.

\*Note - **Invoice Emailing** is only available to those clients that have purchased the Email Document Distribution System (EDDS) module. For more information on the EDDS module contact a TempWorks representative.

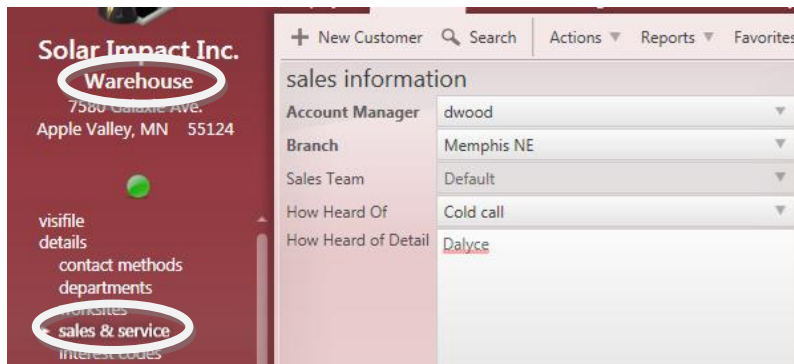


Both the Finance (left) and Human Resources (below) **Department** records have a **Branch** of "Memphis SE", however they both have different **Account Managers**.

The ability to assign a different **Account Manager**, **Branch** or **Sales Team** to a **Department** record allows for more flexibility in sales and commission tracking/reporting.



Both of these **Departments** have the "Corporate Office" as their default **Work Site** (**Details** form) and "8810" is the default **Worker Comp** code (**Invoicing/Credit and Payroll** form).



Solar Impact Inc.  
Warehouse  
7580 Canfield Ave.  
Apple Valley, MN 55124

visifile  
details  
contact methods  
departments  
favorites  
sales & service  
interest codes

+ New Customer Search Actions Reports Favorites

sales information

Account Manager dwood

Branch Memphis NE

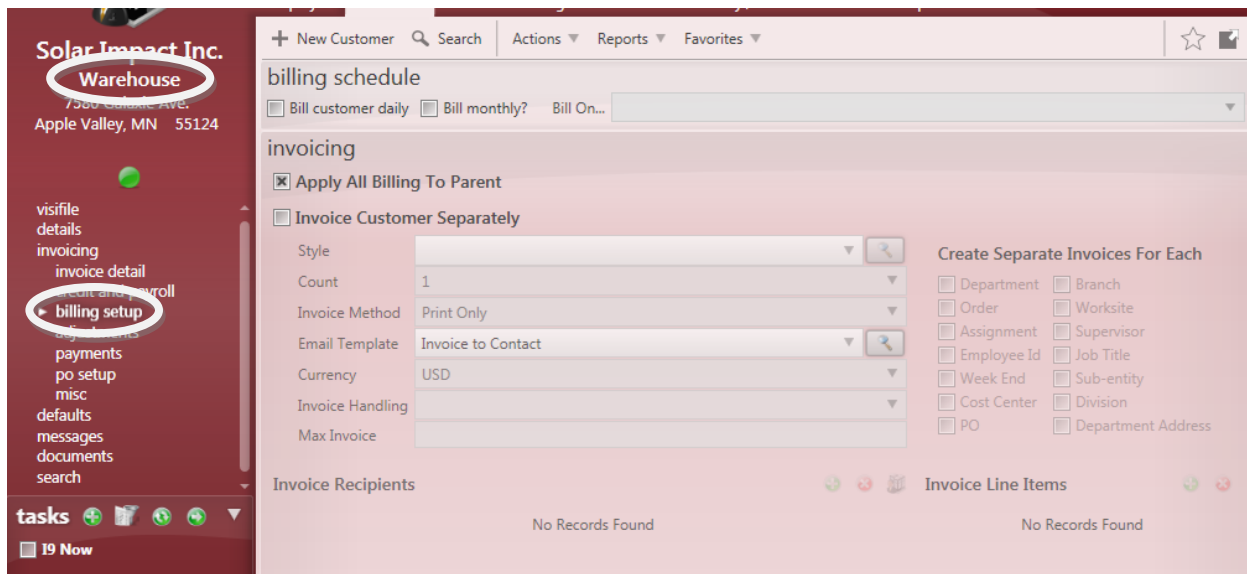
Sales Team Default

How Heard Of Cold call

How Heard of Detail Dalyce

The Warehouse *Department* (left) has both a different *Branch* and a different *Account Manager* from the other two *Departments*.

The Warehouse *Department* has the "Warehouse Site 1" as the default *Work Site* (**Details** form) and "3017" as the default *Worker Comp* code (**Invoicing/Credit and Payroll** form).



Solar Impact Inc.  
Warehouse  
7580 Canfield Ave.  
Apple Valley, MN 55124

visifile  
details  
invoicing  
invoice detail  
credit and payroll  
billing setup  
payments  
po setup  
misc  
defaults  
messages  
documents  
search

tasks  
19 Now

+ New Customer Search Actions Reports Favorites

billing schedule

Bill customer daily  Bill monthly? Bill On...

invoicing

Apply All Billing To Parent

Invoice Customer Separately

Style

Count 1

Invoice Method Print Only

Email Template Invoice to Contact

Currency USD

Invoice Handling

Max Invoice

Create Separate Invoices For Each

Department  Branch

Order  Worksite

Assignment  Supervisor

Employee Id  Job Title

Week End  Sub-entity

Cost Center  Division

PO  Department Address

Invoice Recipients No Records Found

Invoice Line Items No Records Found

The *Billing Setup* form of the Warehouse *Department* record is "grayed out" because the *Apply All Billing To Parent* box is checked. This is the default for all *Department* records when created. This indicates that any **Invoicing** requirements set up on the *Primary* record also apply to the *Department* records. It also means that the accounts receivable will only be tracked at the *Primary* level and not separately for each *Department*. To allow the **Invoicing** requirements to be changed at the *Department* level, click in the *Invoice Customer Separately* box.

**\*Note – For more examples on how to accommodate your client's needs for customized Invoicing, please refer to the help document entitled "12R8 Enterprise Billing Setup".**

Although the *Primary* account has three associated **Contact** records, each of the *Departments* also have a **Contact** record associated with them. With the **Invoices** being created at the *Primary* level, if one of the *Department* **Contacts** logged into WebCenter, they would not be able to view **Invoices** because their security level does not grant them access to viewing the **Invoices** created on the *Primary* account. However, any of the *Primary* **Contacts** would be able to view the **Invoices** for each of the three *Departments* if their WebCenter user *Role* gives them access to the **Invoices** page.

From the **Visifile** of the Finance *Department* (as shown below), the *Parent ID* field will be that of the *Primary* record because the *Primary* is the *Department* one-level above Finance in the **Customer** tree. A *Parent* record is always one level above the current *Department* record. The *Root ID* will be the same as the *Parent ID* because the *Root* refers to the *Primary* record. For a 1<sup>st</sup> level *Department* the *Primary* is both the *Parent* and the *Root*. The *Customer ID* is different from the other ID numbers because it is the unique number for this *Department* record.

The screenshot shows the Solar Impact Inc. Visifile interface. The left sidebar contains a navigation menu with 'Finance' circled in red. The main content area is titled 'customer snapshot' and displays the following information:

Customer Name	Solar Impact Inc.	Customer ID	779839	Branch	Memphis SE	Status	Active
Parent ID	779837	Root ID	779837	Notes			

Below the snapshot, there are sections for 'financials' and 'contacts'. The 'Master View' button is highlighted with a red box.

financials	
Last Payment	YTD Sales \$0.00
Balance Due \$0.00	Lifetime Sales \$0.00
AR Balance \$0.00	Sales Trailing \$0.00
Credit Limit \$0.00	

contacts		
Name	Title	Office Phone
Arnold, Alisha	CEO	(651) 809-3948
Garrett, Tyler	Finance Manager	(694) 845-8472
Linton, Kylie	Receptionist	(698) 383-4775
Taylor, John	Director of Human...	(695) 828-3857

The *Master View* of the Finance *Department Visifile* (above) will display **Contacts** and *Messages* associated with this *Department* record and those also linked to the *Primary*. It will display sales for this *Department* and any *Sub-Departments* that fall below it on the **Customer** hierarchy tree (no A/R will be displayed because the **Invoicing** is occurring at the *Primary* level).

The screenshot shows the Solar Impact Inc. Visifile interface. The left sidebar contains a navigation menu with 'Finance' circled in red. The main content area is titled 'customer snapshot' and displays the following information:

Customer Name	Solar Impact Inc.	Customer ID	779839	Branch	Memphis SE	Status	Active
Parent ID	779837	Root ID	779837	Notes			

Below the snapshot, there are sections for 'financials' and 'contacts'. The 'Account View' button is highlighted with a red box.

financials	
Last Payment	YTD Sales \$0.00
Balance Due \$0.00	Lifetime Sales \$0.00
AR Balance \$0.00	Sales Trailing \$0.00
Credit Limit \$0.00	

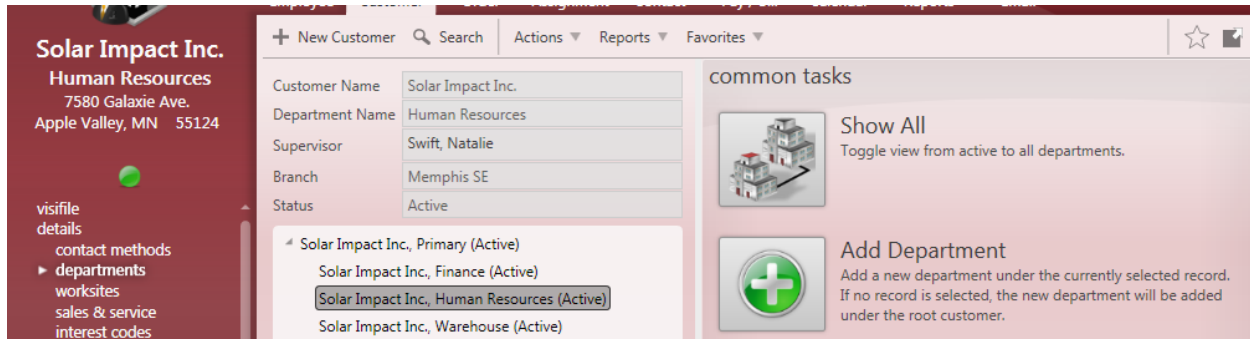
contacts		
Name	Title	Office Phone
Garrett, Tyler	Finance Manager	(694) 845-8472

The *Account View* of the Finance *Department Visifile* (above) will display only those **Contacts**, *Messages*, and sales associated with this *Department* record.

\*Note – The *Department* names chosen above are just examples. They could have just as easily been "St. Paul", "Minneapolis", and "Rochester", referring to the *Branches* that are working with the same **Customer** or "Clerical", "Light Industrial", and "Direct Placement" referring to the staffing division servicing them.

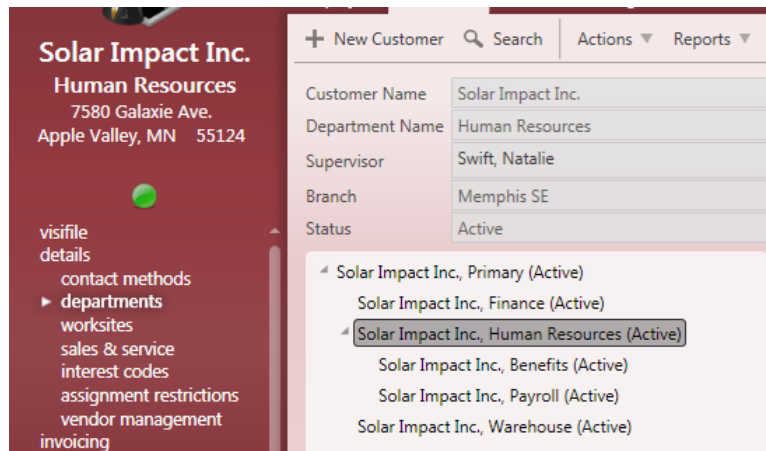
## 2<sup>nd</sup> Level Department Setup

Adding additional levels of *Department* records (2<sup>nd</sup>, 3<sup>rd</sup>, 4<sup>th</sup>, etc.) just increases the flexibility available for **Invoicing** and **Reporting**. Before creating additional *Departments*, verify that the correct *Department* record is currently selected on the *Departments* form.



Above, the "Human Resources" *Department* is selected. When the *Add Department* button is clicked the new *Department* will be created as a *Sub-Department* of "Human Resources".

In the **Customer** tree to the right you can see that two 2<sup>nd</sup> level *Departments* have been added. They are "Benefits" and "Payroll". Both of these *Sub-Departments* will inherit the settings from the "Human Resources" *Department* record.



**\*Note – When creating 2<sup>nd</sup> level (and subsequent) *Departments* you do not need to have the correct *Department* record open as long as it is selected correctly on the *Departments* form. The exception to this is when using the *Add Department* function from the *Actions* drop down menu. When creating the *Department* from the *Actions* menu and not the *Departments* form, you will need to make sure that the correct *Department* record is currently open.**

All of the settings that can be changed at the 1<sup>st</sup> level *Department* records can also be changed at the 2<sup>nd</sup> (and subsequent) *Department* levels. This includes **Order** default information like *Work Site*, *Worker Comp* code, *Shifts*, *Multiplier Codes*, *Account Manager*, *Branch*, etc., as well as adding new **Contacts** and changing **Invoicing** requirements or *Billing Addresses*.

**\*Note – Creating a **Customer** hierarchy allows the user to run consolidated **Customer Reporting** that can be sub-totaled by *Department* and *Sub-Department*. If completely separate **Customer** records are created for the same client, reports will be run separately and then will need to be manually added to get the total amount for all **Customer** sales. Consolidated **Invoicing** would also not be available.**

From the **Visifile** of the Benefits *Sub-Department* (as shown below), the *Parent ID* field will be that of the Human Resources *Department* record because it is the *Department* one-level above Benefits in the **Customer** tree. The *Root ID* will be that of the *Primary* because *Root* refers to the *Primary Customer* record. For all 2<sup>nd</sup> level *Departments* (and subsequent) all three ID numbers (*Parent*, *Customer*, and *Root*) will be different. The *Customer ID* is the unique number for this *Sub-Department* record.

The screenshot shows the Solar Impact Inc. Visifile in Master View. The 'Benefits' sub-department is circled in red. The 'Master View' button is highlighted with a red box. The interface displays the following information:

- customer snapshot:** Customer Name: Solar Impact Inc., Customer ID: 779842, Branch: Memphis SE, Status: Active. Parent ID: 779840, Root ID: 779837.
- financials:** Last Payment, Balance Due: \$0.00, AR Balance: \$0.00, Credit Limit: \$0.00. YTD Sales: \$0.00, Lifetime Sales: \$0.00, Sales Trailing: \$0.00.
- contacts:** A table with columns Name, Title, and Office Phone. Contacts include Arnold, Alisha (CEO), Carlisle, Gordan (Lead Benefits Admi...), Linton, Kylie (Receptionist), Swift, Natalie (HR Manager), and Taylor, John (Director of Human...).
- messages:** A table with columns Date, Action, Message, Rep, Contact, and Due. Messages include test messages from alisha on 3/26/2010 and 3/25/2010.

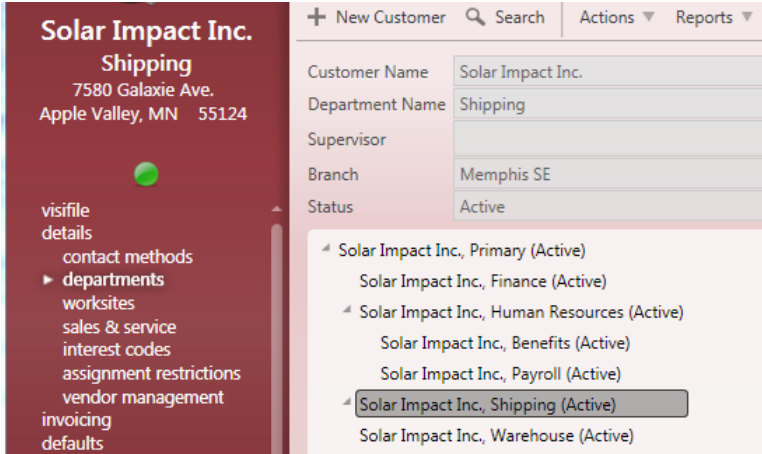
The *Master View* of the Benefits *Sub-Department Visifile* (above) will display **Contacts** and *Messages* associated with this 2<sup>nd</sup> level *Department* record and those also linked to the *Primary* and Human Resources *Departments*. It will display sales for this *Sub-Department* and any *Sub-Departments* that fall below it on the **Customer** hierarchy tree (no A/R will be displayed because the **Invoicing** is occurring at the *Primary* level).

The screenshot shows the Solar Impact Inc. Visifile in Account View. The 'Benefits' sub-department is circled in red. The 'Account View' button is highlighted with a red box. The interface displays the following information:

- customer snapshot:** Customer Name: Solar Impact Inc., Customer ID: 779842, Branch: Memphis SE, Status: Active. Parent ID: 779840, Root ID: 779837.
- financials:** Last Payment, Balance Due: \$0.00, AR Balance: \$0.00, Credit Limit: \$0.00. YTD Sales: \$0.00, Lifetime Sales: \$0.00, Sales Trailing: \$0.00.
- contacts:** A table with columns Name, Title, and Office Phone. Contact includes Carlisle, Gordan (Lead Benefits Admi...).
- messages:** A table with columns Date, Action, Message, Rep, Contact, and Due. Message includes Test message from alisha on 3/25/2010.

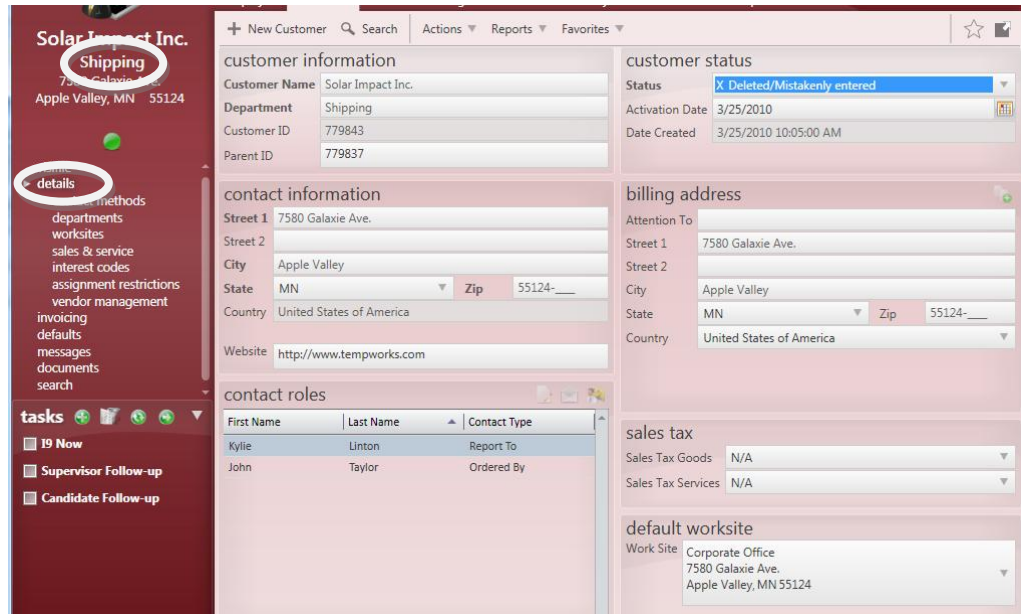
The *Account View* of the Benefits *Sub-Department Visifile* (above) will display only those **Contacts**, *Messages*, and sales associated with this *Sub-Department* record.

Fixing the Customer Hierarchy Tree

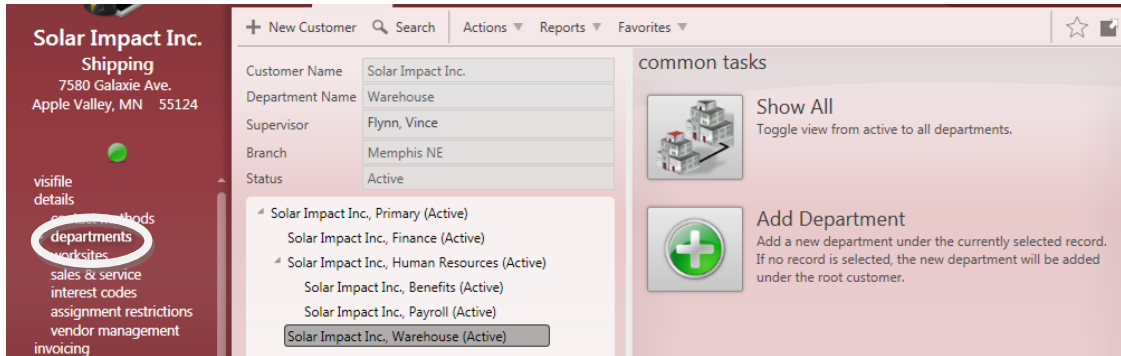


In the **Customer** tree to the left, "Shipping" was created as a 1<sup>st</sup> level **Department**. For training purposes however, let's say that it was supposed to be created as a **Sub-Department** (2<sup>nd</sup> level) under the "Warehouse".

\*Note – Once a **Department** has been created it can't just be moved within the **Customer** hierarchy tree. To fix its level within the hierarchy follow the steps below:



To fix the **Customer** tree open the Shipping **Department** record to the **Details** form (shown above) and change the *Status* to "Deleted/Mistakenly Entered". Then *Save* the record and return to the **Departments** form.



Select the "Warehouse" **Department** from the **Customer** tree and then click on *Add Department*. Enter the "Shipping" **Department Name** and *Save*. The Shipping **Department** will now be a **Sub-Department** of the Warehouse record.


### WebCenter Customer Portal Access

The “rule of thumb” for setting up WebCenter Customer Portal **Contact** security is that **Contacts** that are associated with the *Primary* account will be able to see all **Orders** and **Invoices** as well as being able to submit **Orders** and run **Reports** for all *Departments* within the hierarchy tree. In other words, a **Contact** associated with the *Primary* account has the highest security access possible.

*\*Note – The WebCenter **Contact Role** that they’re assigned to may still limit the pages they’re able to access.*

A **Contact** that is associated with a *Department* record other than the *Primary* will only be able to see information in WebCenter that applies to their *Department* and any *Sub-Departments* that fall underneath it. For example, a **Contact** associated with the Human Resources *Department* would also be able to see **Orders, Assignments, Invoices**, etc. for the Benefits and Payroll *Sub-Departments* as they fall underneath the Human Resources *Department* in the **Customer** hierarchy tree used in the example above. However, the Human Resources **Contact** would not be able to see any information for the Finance or Warehouse *Departments*.


*\*Note – For more information on **Contact** set up for the WebCenter Customer Portal, refer to the help document entitled “WebCenter v. 5 Quick Start Guide – Customer Portal”.*

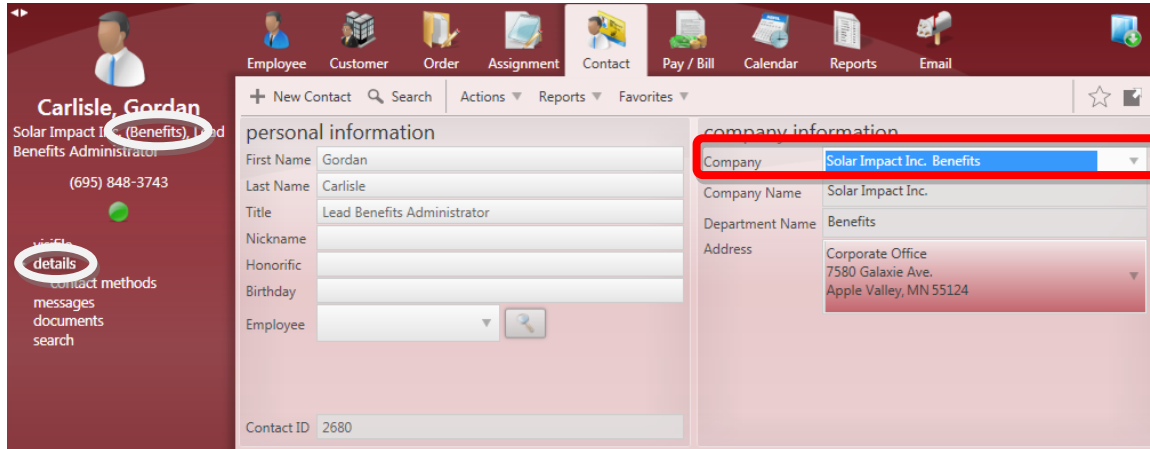
Even if your company is not using the WebCenter Customer Portal, the *Department* that a **Contact** is associated with can give you important information about what the **Contact** should have access to. For example, let’s say Gordan Carlisle is a **Contact** associated with the Benefits *Sub-Department* and he calls in and asks the status of the **Orders** you’re working on for his *Department*. That information can be found quite quickly by starting at the **Contact** record and looking him up. Once you’re on the **Contact Visifile**, click on the  button that appears at the end of the *Company Name* field in the Contact Snapshot section. This takes you to the Benefits *Department Visifile*. Now open the *Actions* drop down menu and select *View Orders*. All of the **Orders** for this *Sub-Department* will be displayed in the **Order Search** form. Sort by the *Order Status* column until the **Orders** with an “Unfilled” *Status* are displayed at the top. From here you can open each of the “Unfilled” **Orders** to give Gordan an update on where you’re at with them.

Now let’s say that Gordon calls again and wants information about **Orders** for the Payroll *Sub-Department*. As he isn’t associated with the Payroll *Sub-Department* or the Human Resources *Department* record that is above Payroll in the **Customer** tree, you would be wise to tell him that you would have to get permission from a **Contact** associated with either of these *Departments* before giving out that information.

*\*Note – It is never a good idea to give a **Contact** information for *Departments* that they are not directly associated with, unless that *Department* falls underneath theirs on the **Customer** hierarchy tree.*

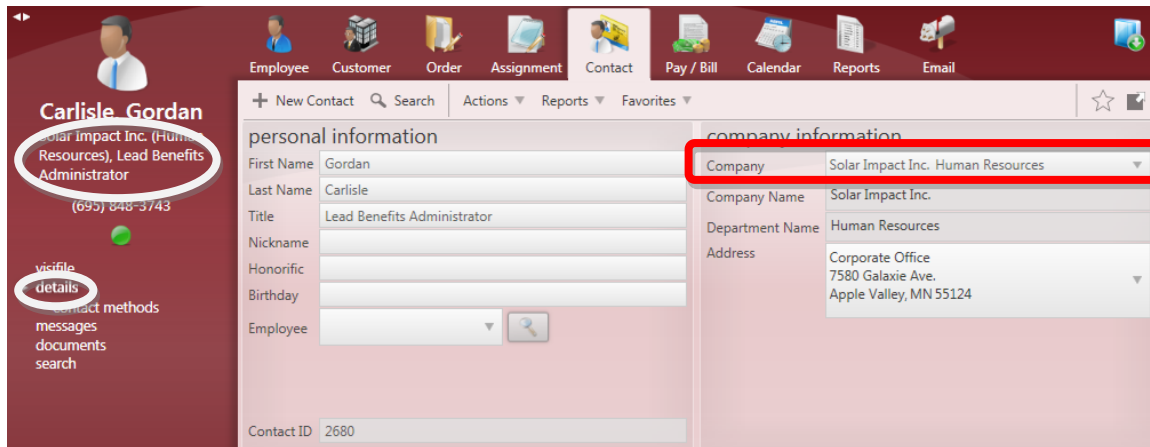
## Changing a Contact's Department Association

The easiest way to make sure that a **Contact** is set up at the correct level in the **Customer** hierarchy tree is by opening the *Department* record that they should be associated with and then clicking on the  button in the Contacts section on the **Customer Visifile** or by selecting *New Customer Contact* from the *Actions* drop down menu. When the *Add New Contact* form opens it will automatically pull in the *Customer* and *Department* that are currently open on the **Customer** record.



The screenshot shows the contact record for Gordan Carlisle. The contact is currently associated with Solar Impact Inc. (Benefits). The 'Company' dropdown menu in the 'company information' section is highlighted with a red box, showing 'Solar Impact Inc. Benefits' selected. The contact's title is 'Lead Benefits Administrator' and the contact ID is 2680.

Above, Gordan Carlisle is currently associated with the Benefits *Sub-Department* of Solar Impact Inc. To move his record to the Human Resources *Department* select the correct **Customer/Department** record from the *Company* drop down menu outlined in red.



The screenshot shows the contact record for Gordan Carlisle. The contact is now associated with Solar Impact Inc. (Human Resources). The 'Company' dropdown menu in the 'company information' section is highlighted with a red box, showing 'Solar Impact Inc. Human Resources' selected. The contact's title is 'Lead Benefits Administrator' and the contact ID is 2680.

After the **Customer** is selected from the *Company* drop down and the **Contact** record is *Saved*, the avatar area will update with the *Department* record that the **Contact** is now associated with.

*\*Note – If a **Contact** should be able to view information for more than one *Department* from the WebCenter, the best practice is to delete the current *Department* records, create a *Department* record that the **Contact** is associated with and then re-create the previous *Departments* (this time as *Sub-Departments* under the *Department* the **Contact** is associated with), and the **Orders, Assignments, etc.** under the new *Sub-Department* records. Although it would be possible to keep the current *Departments* and just add the **Contact** to both, it creates confusion because the **Contact** then requires two different *Usernames* to be able to access the information they need in the WebCenter Customer Portal.*

## Pros and Cons of Creating Departments

As shown by the list below the positive reasons for creating *Department* records and utilizing the **Customer** hierarchy tree far outweigh any negative aspects because of the flexibility that this functionality offers.

<b>Pros</b>	<b>Cons</b>
Able to track sales for different Branches, Account Managers & Sales Teams	Requires more training so that users understand how to set up the Departments correctly and then create the Orders and Assignments accordingly and why this is important.
Ability to separate and/or group Reports by Department	Invoicing and Reporting errors will occur when Orders and Assignments are created for the wrong Department record and not fixed prior to Time Entry
Ability to run Reports for the Primary and sub-total by Department instead of totaling manually because each Department is its own Customer record	May require some duplication of work if a Contact's Department association changes and a new Department record is needed.
Allows greater user security from the WebCenter Customer Portal	
Contacts using the WebCenter can be set up at a hierarchy level that allows them to see information from multiple Departments without requiring multiple Usernames	
Order defaults can be changed at the Department level so that getting the correct information on the Order is almost error-proof	

**\*Note – The WebCenter Customer Portal mentioned throughout this document is an ancillary product and not part of the “core” Enterprise software. For more information on this web solution contact a TempWorks representative.**

### Still Have Questions?

For more information about customer department functionality contact our customer support group at 651-452-0366 or by sending an email to [support@tempworks.com](mailto:support@tempworks.com).

To schedule training on customer department functionality, submit suggestions on how to improve this document, or to request documentation on other Enterprise functionality please contact Alisha Arnold (Corporate Trainer) at 651-287-8370 or by sending an email to [Alisha@tempworks.com](mailto:Alisha@tempworks.com).