15R1 Enterprise Customer Departments Setup

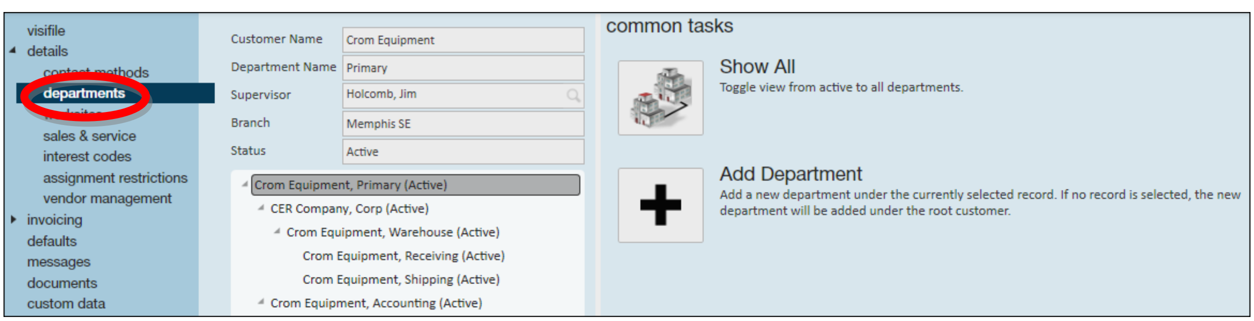
Enterprise **Customer** ***Department*** hierarchy set up allows for unlimited flexibility in tracking commissions, **Invoicing** requirements, and ***Department*** **Order** defaults. This help document explains the role of ***Departments*** in the **Customer** record and gives examples of common **Customer**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

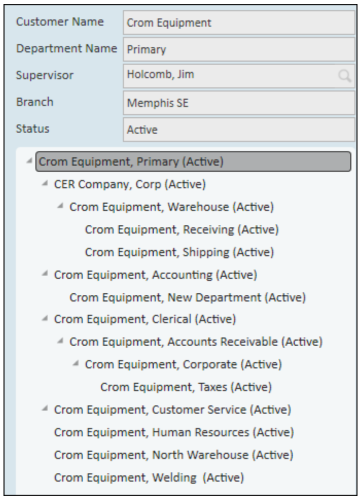
The ***Departments*** form is found within the **Customer Details** section. The terms ***Department***, ***Child Customer*** and ***Division*** are interchangeable as they pertain to the **Customer** Hierarchy. There are a number of reasons why it would be important to create a ***Department*** for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

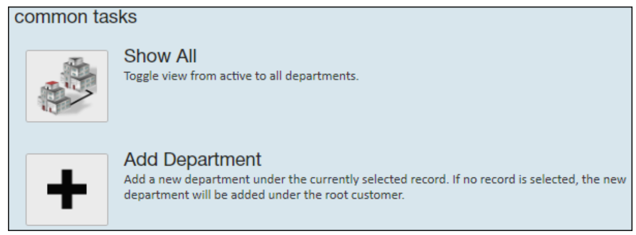




In the middle of the ***Departments*** form it displays information similar to what is shown to the left. The ***Department*** record you currently have open for the **Customer** will be highlighted when you open this form. It will also list the **Contact** who has been listed as the default *Supervisor* 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.

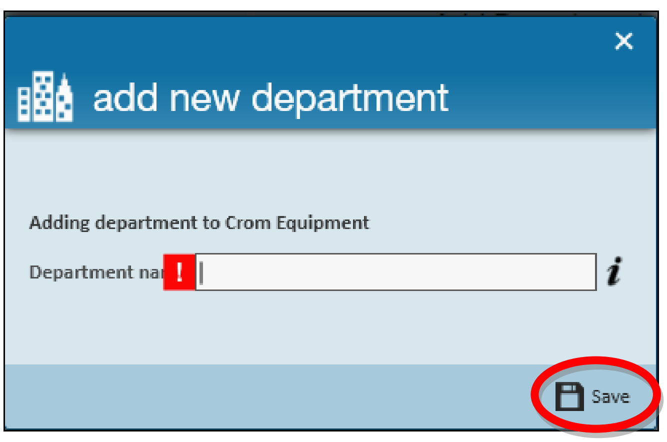
In the Common Tasks section you can change the **Customer** tree view so that it only displays "Active" ***Departments*** or click on *Show All* to display all "Active" and "Inactive" ***Departments*** within the **Customer** hierarchy.



*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 to highlight the level for which you would like to add the department under and click on the *Add Department* button. The following window will be displayed:



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.

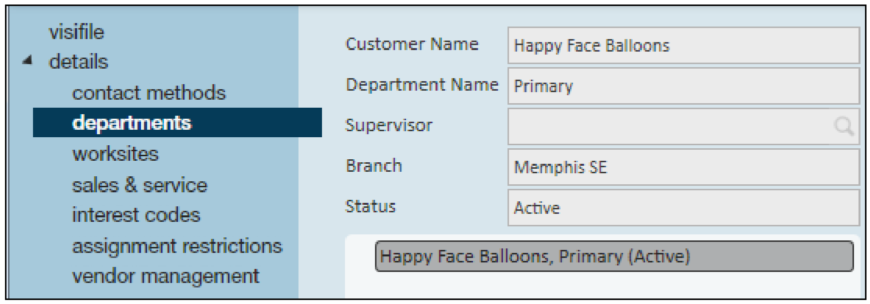
*Note – Make sure that the correct ***Department*** record is highlighted before opening the ***Add New Department*** form, or the ***Department*** will be added at the wrong level of the hierarchy tree. If this happens the only way to fix it is to change the new ***Department*** *Status* to "Deleted/Mistakenly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

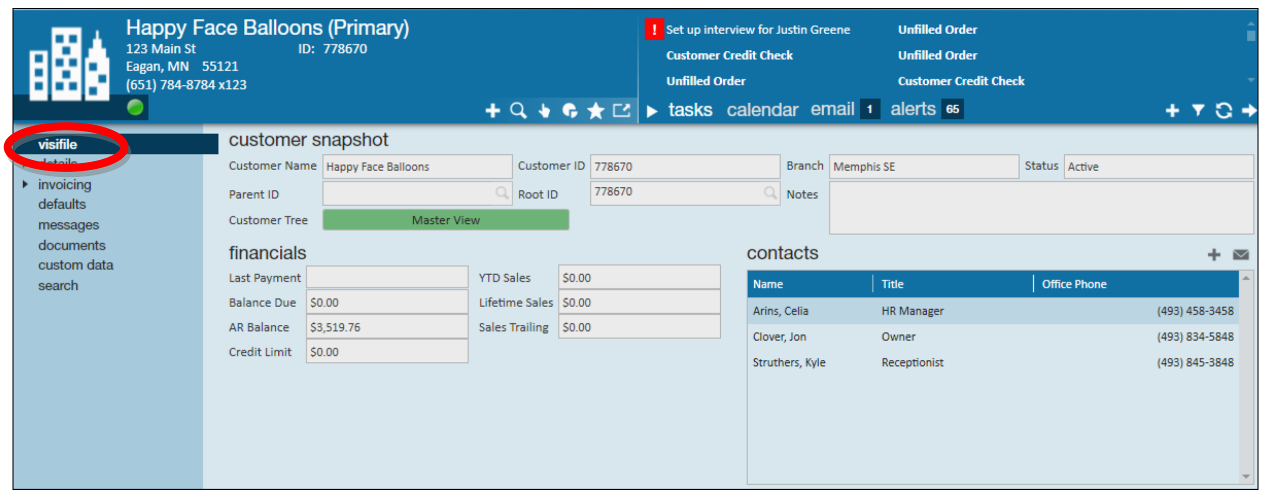
Customer Hierarchy Examples:

<u>Basic Default Set up</u>

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**.



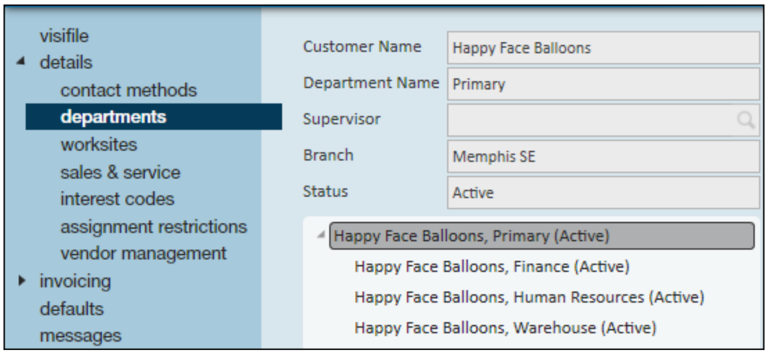


From the **Visifile** (as shown above), the *Parent ID* field will be blank because the ***Primary*** is the highest ***Department*** in the **Customer** tree and the *Customer ID* and *Root ID* will be the same. Also, the *Master View* and *Account View* **Visifile** screens will display the same information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

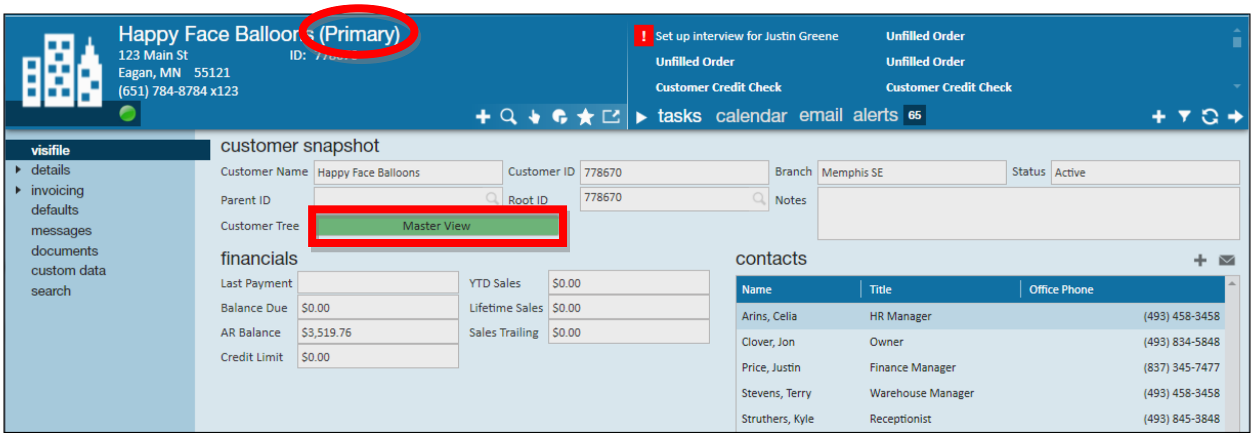
*Note – All of the **Orders** and **Assignments** will be created for the ***Primary*** record and can be viewed by using the *View Orders* and *View Assignments* shortcuts from the drop down menu.

1st Level Department Setup

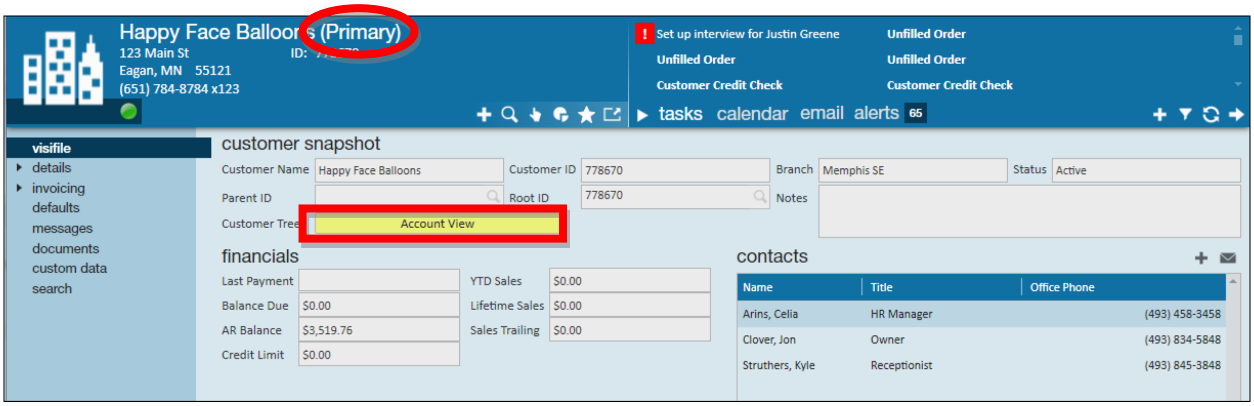
Adding ***Department*** records in Enterprise increases the flexibility you have for setting up **Order** defaults, tracking sales and commissions, as well as customizing **Customer Invoice** requirements. The next example contains three different ***Department*** records. Each ***Department*** record 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.



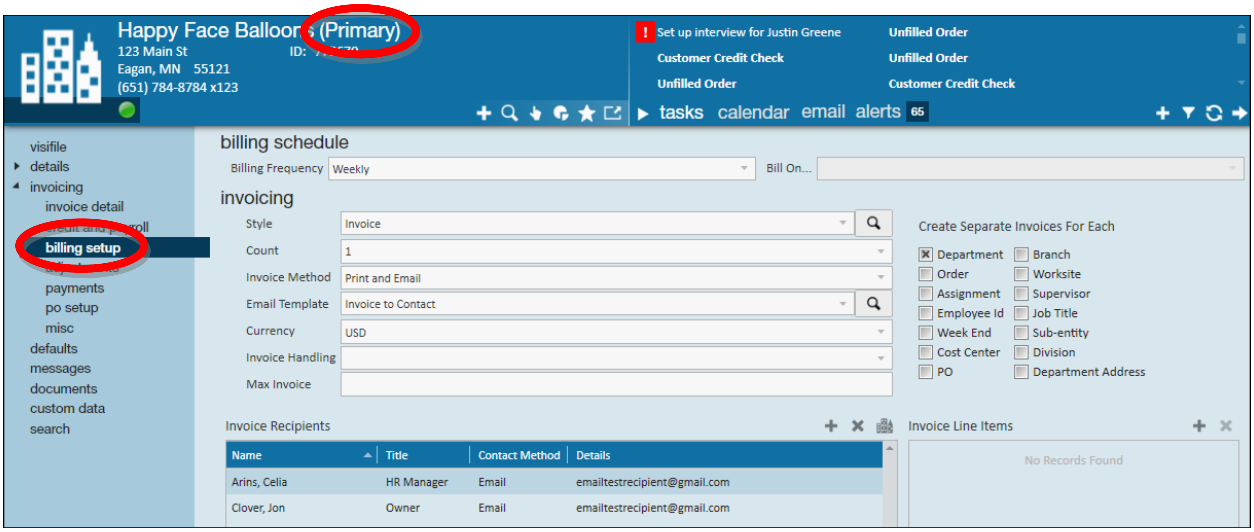
To the left is how the **Customer** tree will look if the **Customer** has a ***Primary*** account and three first-level ***Department*** records. The ***Department*** records are named "Finance", "Human Resources", and "Warehouse". Each of the ***Departments*** inherits the settings from the ***Primary***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

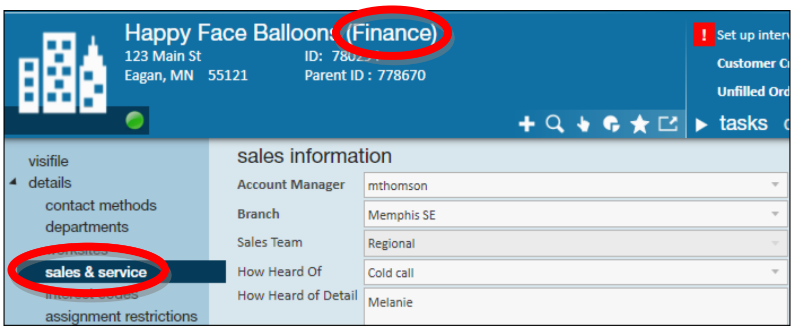


The **Visifile** *Account View* for the ***Primary*** record will show only those **Contacts**, ***Messages***, and Financial detail for the ***Primary*** record. Click on the *Account View* button to toggle back to the *Master View*.

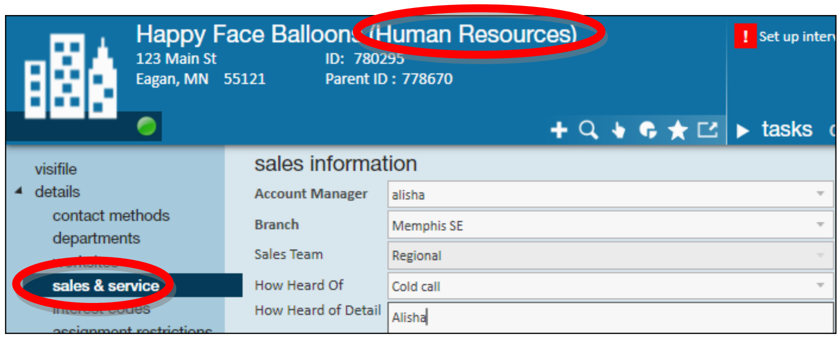


In the ***Billing Setup*** form of the ***Primary*** record (shown above) the **Invoicing** has been set up so that the **Invoice** will be printed and ***Emailed***. One **Invoice** will be created for each of the ***Department*** records because the *Department* box in the Create Separate Invoices 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.

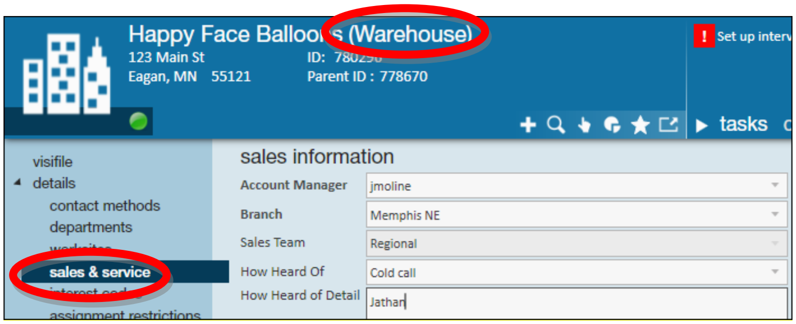


Both the Finance (left) and Human Resources (below) ***Department*** records have a *Branch* of "Memphis SE", however they both have different *Account Managers*.



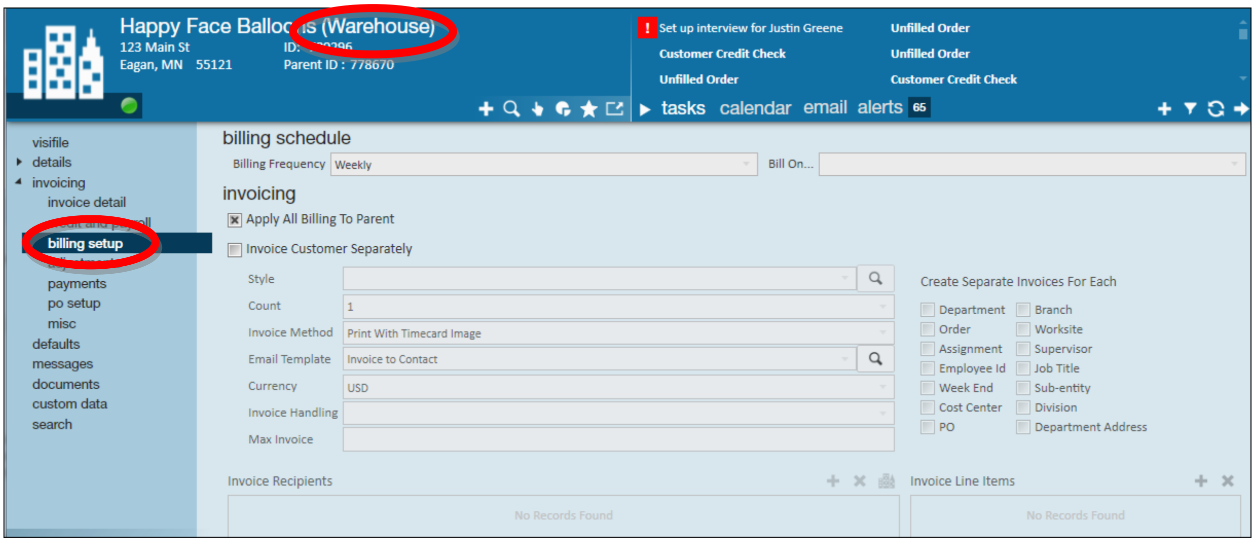
The ability to assign a different *Account Manager*, *Branch* or *Sales Team* to a ***Department*** record allows for more flexibility in sales and commission tracking/reporting.

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).



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).

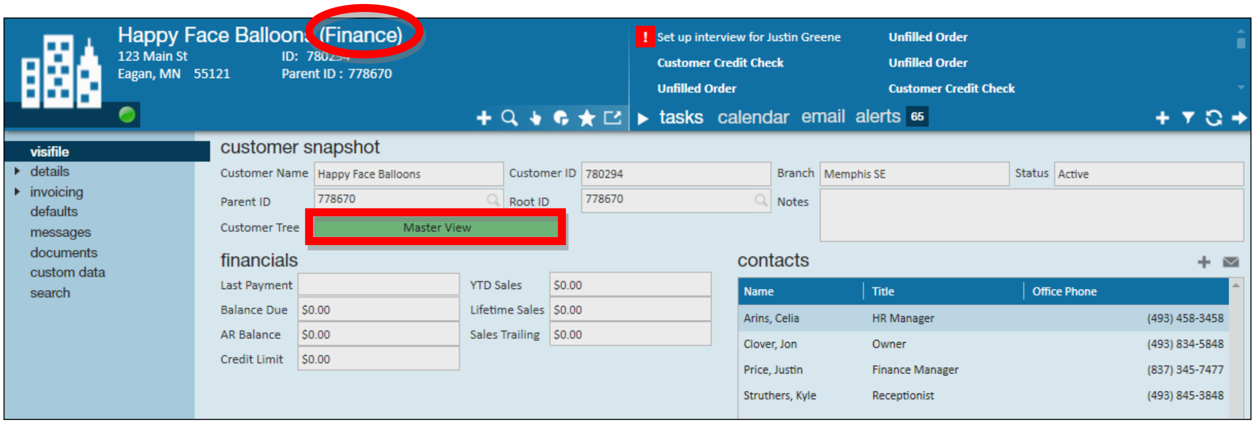


The ***Billing Setup*** form of the Warehouse ***Department*** record is "grayed out" because the *Apply All Billing To Parent* box is checked. This is the default for all ***Department*** records when created. This indicates that any **Invoicing** requirements set up on the ***Primary*** record also 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.

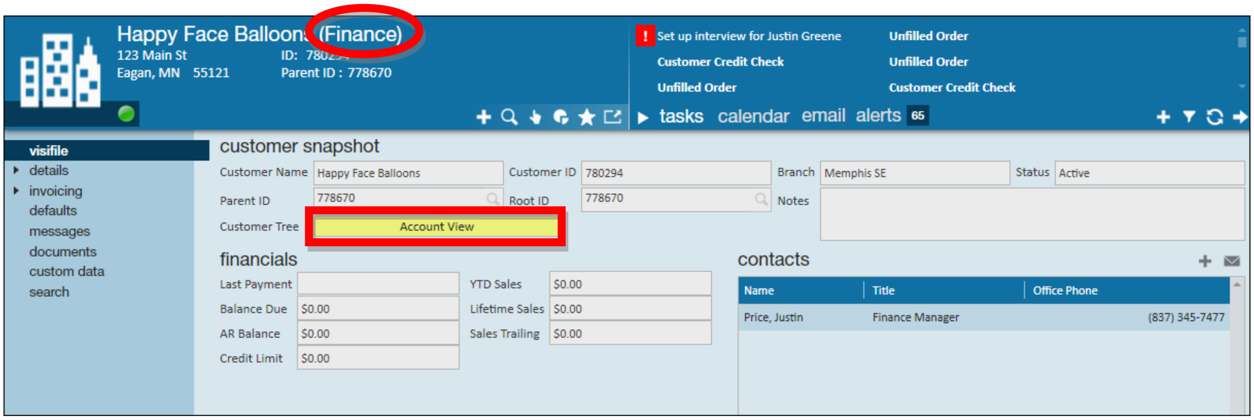
*Note – For more examples on how to accommodate your client's needs for customized **Invoicing**, please refer to the help document entitled "15R1 Enterprise Billing Setup".

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 <u>not</u> be able to view **Invoices** because their security level does <u>not</u> 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 1st 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 *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).

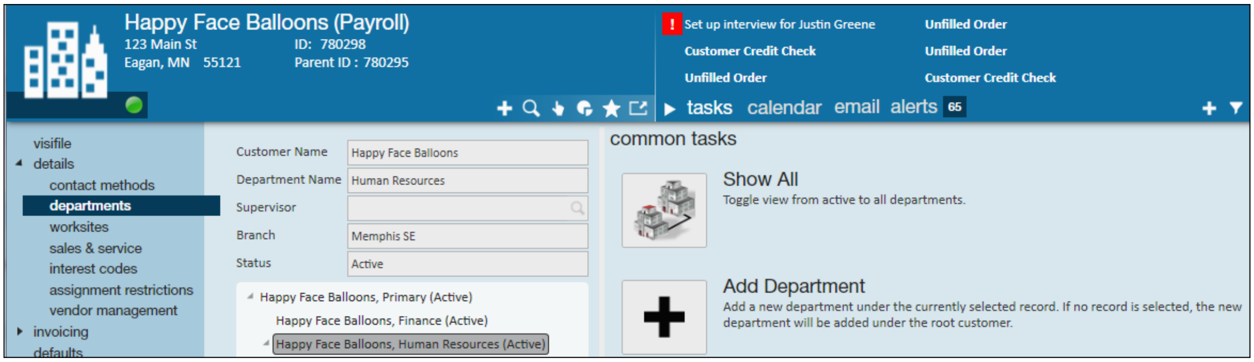


The *Account View* of the Finance ***Department*** **Visifile** (above) will display only those **Contacts**, ***Messages***, and sales associated with this ***Department*** record.

*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.

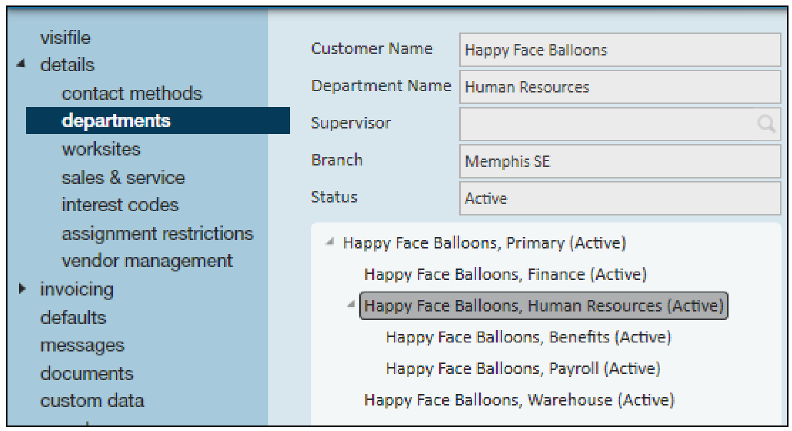
2nd Level Department Setup

Adding additional levels of ***Department*** records (2nd, 3rd, 4th, 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 2nd 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.

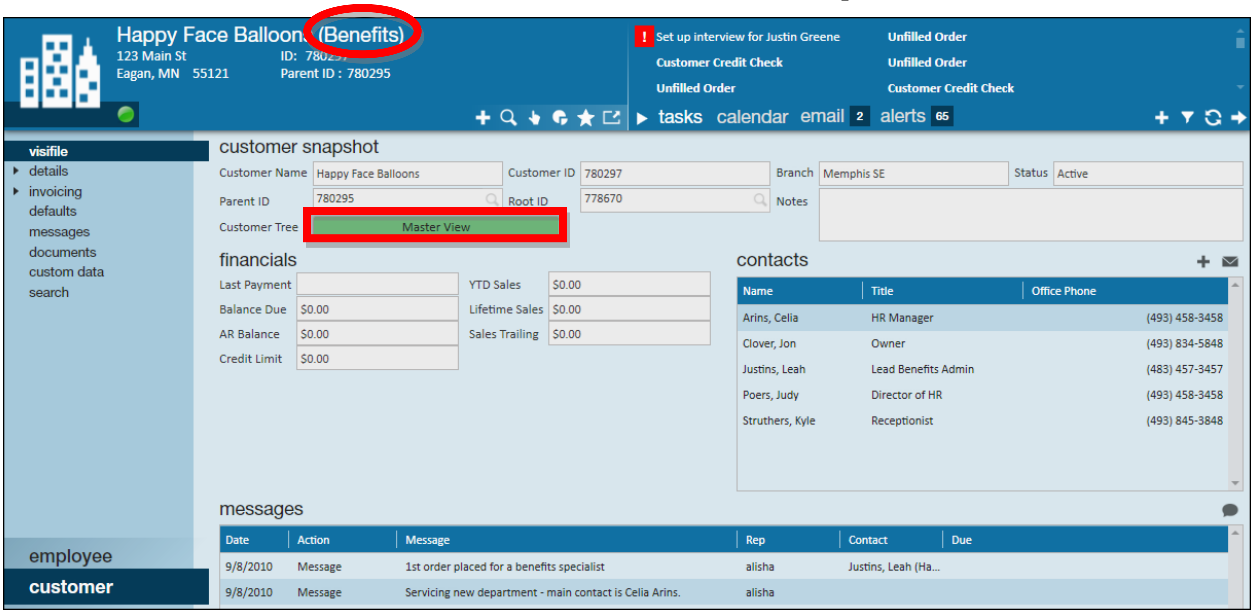


*Note – When creating 2nd level (and subsequent) ***Departments*** you do not need to have the correct ***Department*** record open as long as it is selected correctly on the ***Departments*** form. The exception to this is when using the *Add Department* function from the drop down menu. When creating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

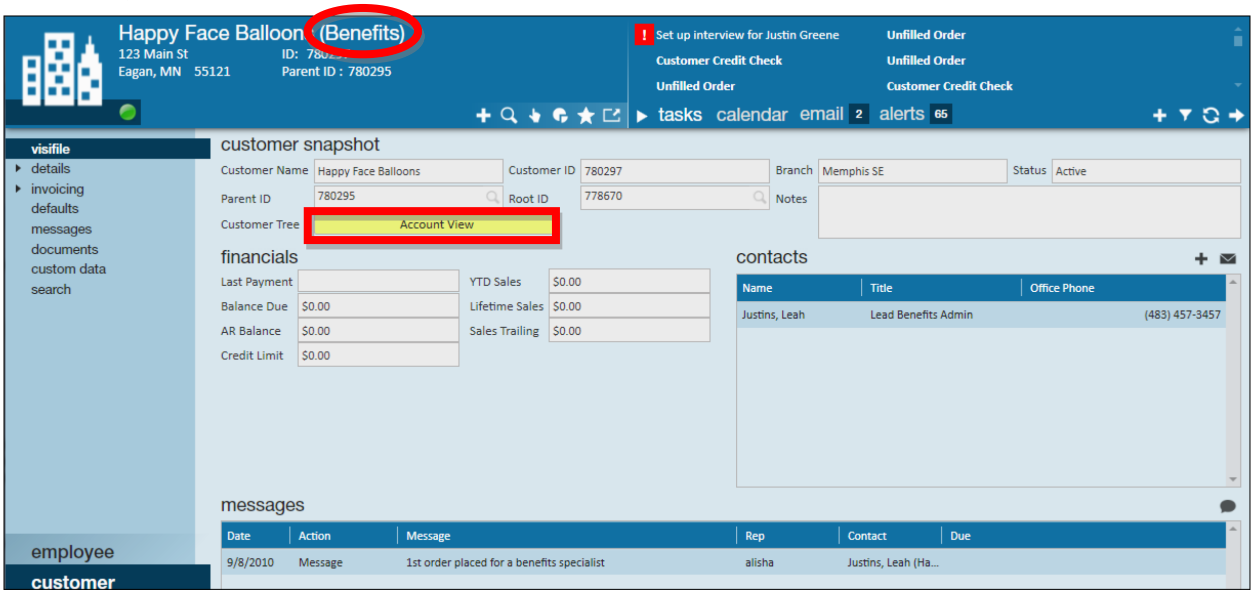
All of the settings that can be changed at the 1st level ***Department*** records can also be changed at the 2nd (and subsequent) ***Department*** levels. This includes **Order** default information like *Work Site*, *Worker Comp* code, *Shifts*, *Multiplier Codes*, *Account Manager*, *Branch*, etc., 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 2nd 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.

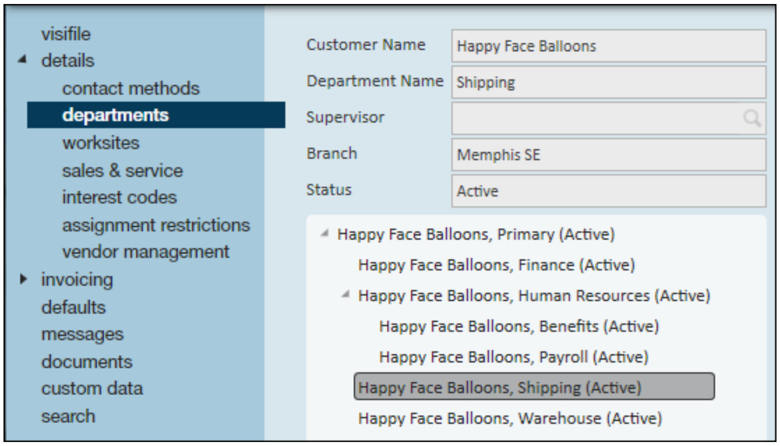


The *Master View* of the Benefits ***Sub-Department*** **Visifile** (above) will display **Contacts** and ***Messages*** associated with this 2nd level ***Department*** record and those also linked to the ***Primary*** and Human Resources ***Departments***. It will display sales for this ***Sub-Department*** 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).



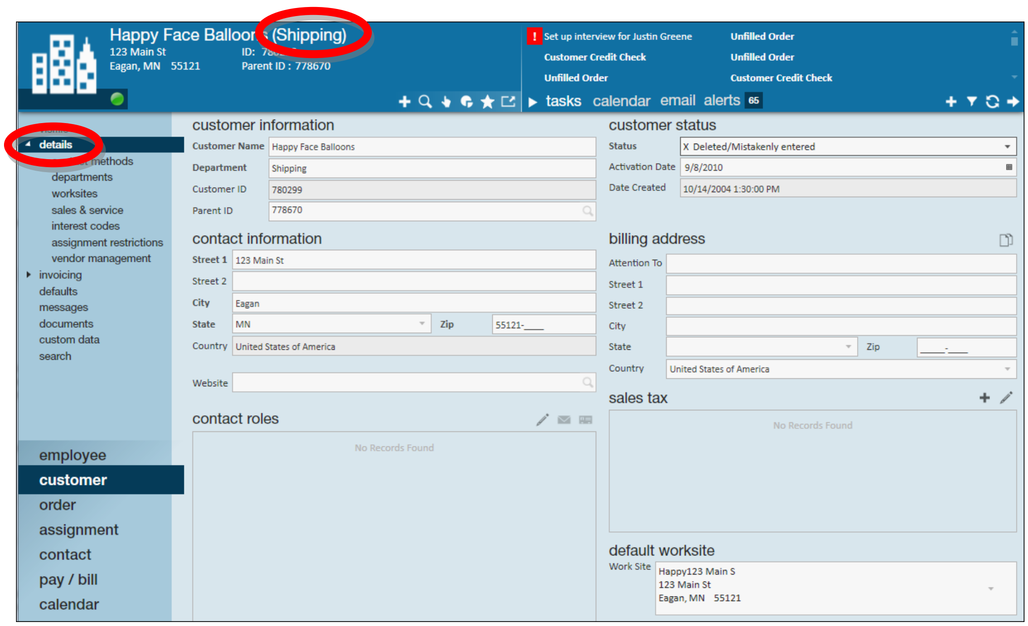
The *Account View* of the Benefits ***Sub-Department*** **Visifile** (above) will display only those **Contacts**, ***Messages***, and sales associated with this ***Sub-Department*** record.

Fixing the Customer Hierarchy Tree

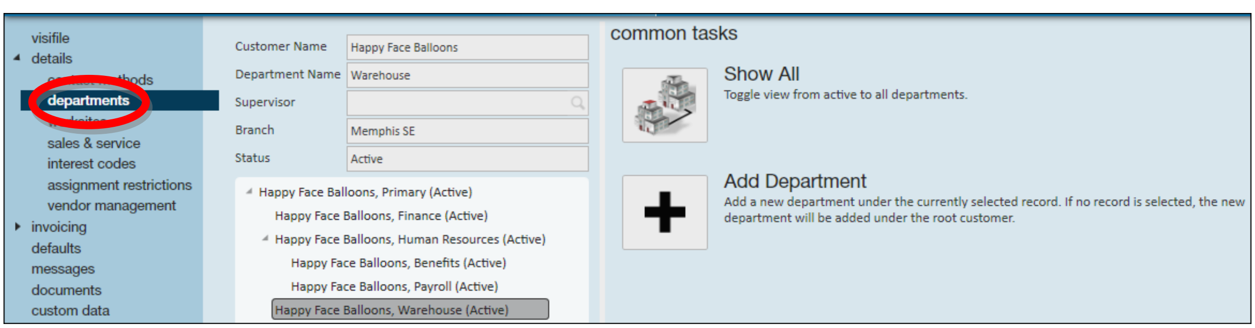


In the **Customer** tree to the left, "Shipping" was created as a 1st level ***Department***. For training purposes however, let's say that it was supposed to be created as a ***Sub-Department*** (2nd level) under the "Warehouse".

*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.

<u>WebCenter Customer Portal Access</u>

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***.

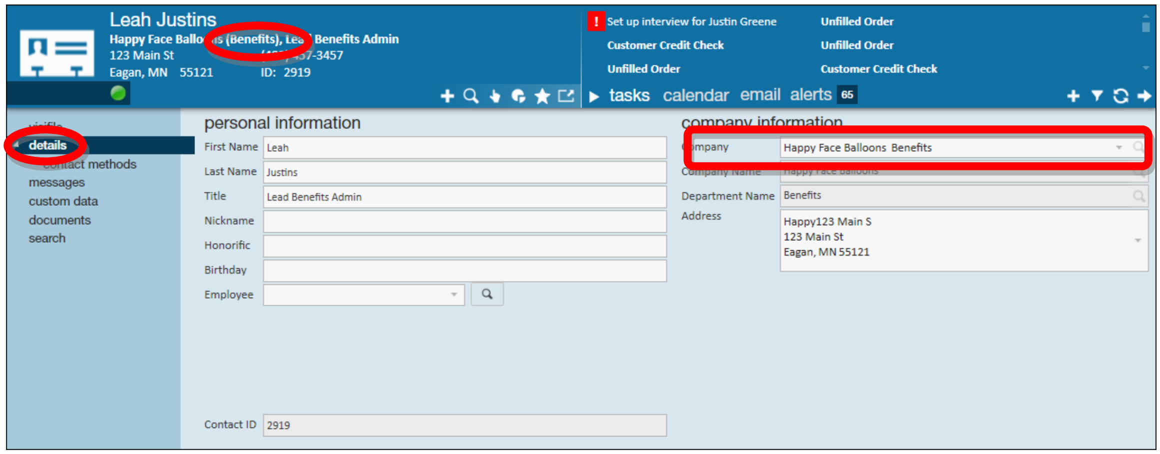
*Note – For more information on **Contact** set up for the WebCenter Customer Portal, refer to the help document entitled "WebCenter v. 5 Quick Start Guide – Customer Portal".

Even if your company is <u>not</u> 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 Jane Doe is a **Contact** associated with the Benefits ***Sub-Department*** and she calls in and asks the status of the **Orders** you're working on for her ***Department***. That information can be found quite quickly by starting at the **Contact** record and looking her 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 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 Leah an update on where you're at with them.

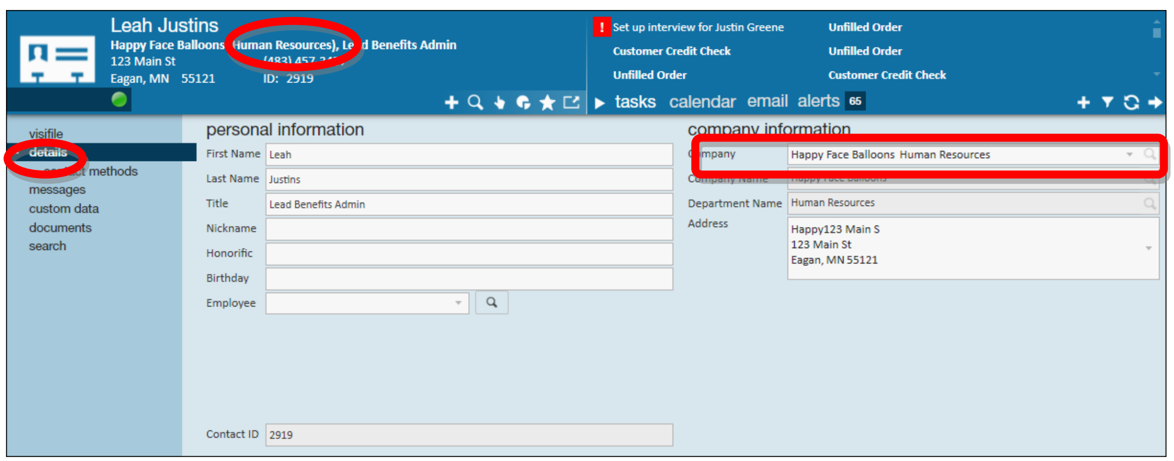
Now let's say that Jane calls again and wants information about **Orders** for the Payroll ***Sub-Department***. As she isn't associated with the Payroll ***Sub-Department*** or the Human Resources ***Department*** record that is above Payroll in the **Customer** tree, you would be wise to tell her that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

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 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.



Above, Leah Justins is currently associated with the Benefits ***Sub-Department*** of Happy Face Balloons. To move her record to the Human Resources ***Department*** select the correct **Customer**/***Department*** record from the *Company* drop down menu outlined in red.



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.

Benefits of Creating Departments for Customers

- Able to track sales for different Branches, Account Managers & Sales Teams
- Ability to separate and/or group Reports by Department
- Ability to run Reports for the Primary and subtotal by Department instead of totaling manually
- 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.

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 our Training Department at trainers@tempworks.com.

