Setting Up Departments

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Departments can be useful if you want to be able to differentiate spend or volume by department, brand, or mailing campaign. Using the Reporting function you can produce and export reports showing the departmental breakdown.

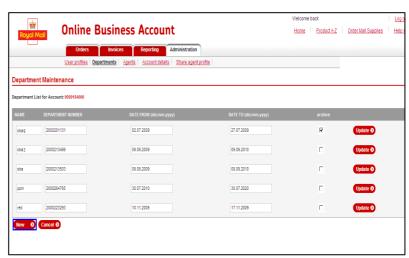
Setting up departments is easy to do as long as you have the role of Ordering Supervisor Department References.

You set up the different department names that you want to use and when creating an order this information can be added, although it is not a mandatory field so you'll need to let your mailroom or mailing agent know that you want them to use it.

Select the Administration tab and then 'Departments'. Select the account you want to add a department onto. If there are any department references already set up they will be listed here



To add a new department reference click on 'New'

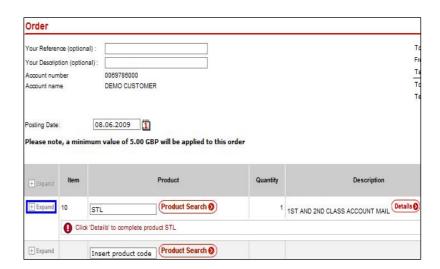


Enter the 'Department Name' and when you want it to be live from and until. Click on 'Save'. Your details will be added to the list, in alphabetical order.

		Ces Reporting A Agents Account details	Share agent profile	
partment Mainten	ance			
ate new Department for	Account: 0099184000			
partment Name				
ılid From Date (dd.mm.yyyy)				
lid To Date (dd.mm.yyyy)				

Using the Department field within a Sales Order

Within the Orders tab, select 'Create New Order', complete the product details and click on the 'Expand' button.



You will now see the Department field.

Click on the drop down box and select the correct department name. Your department name needs to be live to show in this box. Archived names will not appear either.

Continue creating your Sales Order as normal.

