

# Setting Up Departments

## Setting Up Departments

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.

Online Business Account

Administration

Departments

Department Maintenance

Please select your account:

ACCOUNT	NAME	ADDRESS	CITY
0089786000	DEMO CUSTOMER	ONLINE BUSINESS ACCOUNT ROOM BF20, ROWLAND HILL HOUSE.	CHES
0087900000	DEMO MAILING AGENT	ONLINE BUSINESS ACCOUNT ROOM BF20, ROWLAND HILL HOUSE.	CHES
0099182000	DEMO OBA BW 1	SYSTEMS MANAGEMENT ROOM BF20, ROWLAND HILL HOUSE	CHES
0099184000	DEMO OBA BW 2	SYSTEMS MANAGEMENT ROOM BF20, ROWLAND HILL HOUSE	CHES
0099186000	DEMO OBA BW 3	SYSTEMS MANAGEMENT ROOM BF20, ROWLAND HILL HOUSE	CHES
0127229000	DEMO OBA	ONLINE BUSINESS ACCOUNT ROOM BF20, ROWLAND HILL HOUSE.	LEED

To add a new department reference click on 'New'

Online Business Account

Administration

Departments

Department Maintenance

Department List for Account: 0099184000

NAME	DEPARTMENT NUMBER	DATE FROM (dd.mm.yyyy)	DATE TO (dd.mm.yyyy)	archive	
oba9	2000201131	02.07.2009	27.07.2009	<input checked="" type="checkbox"/>	Update
oba3	2000213468	09.09.2009	09.09.2010	<input type="checkbox"/>	Update
oba	2000213503	09.09.2009	09.09.2010	<input type="checkbox"/>	Update
ppm	2000264768	30.07.2010	30.07.2020	<input type="checkbox"/>	Update
red	2000223293	10.11.2009	17.11.2009	<input type="checkbox"/>	Update

New Cancel

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.

Online Business Account

Administration

Departments

Department Maintenance

Create new Department for Account: 0099184000

Department Name

Valid From Date (dd.mm.yyyy)

Valid To Date (dd.mm.yyyy)

Save Cancel Back

## 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.

