Configuring Departments

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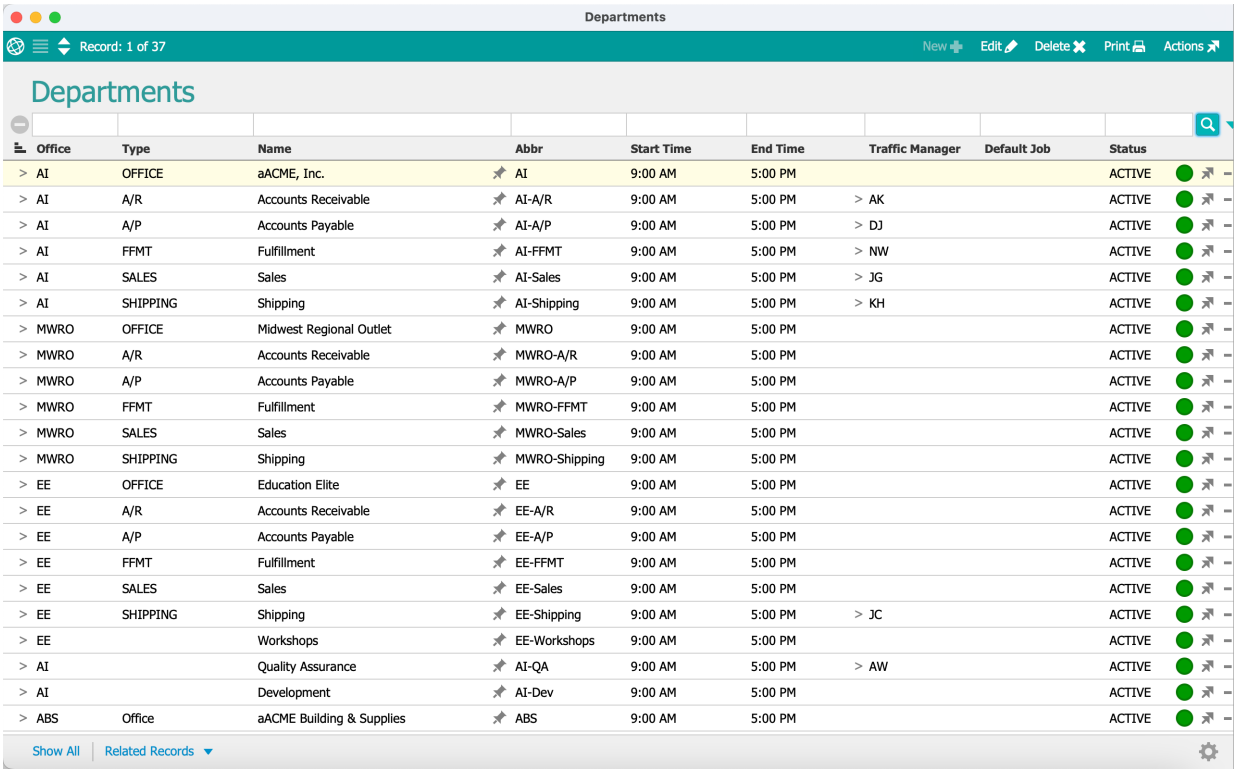
This guide explains creating and editing departments. It is intended for advanced users.

System administrators can access departments from the Departments module or the office record.

Creating and Editing Departments

The Departments module allows system administrators to work with existing department records. To access the Departments module, from the Main Menu go to Internal > Details > > Departments.

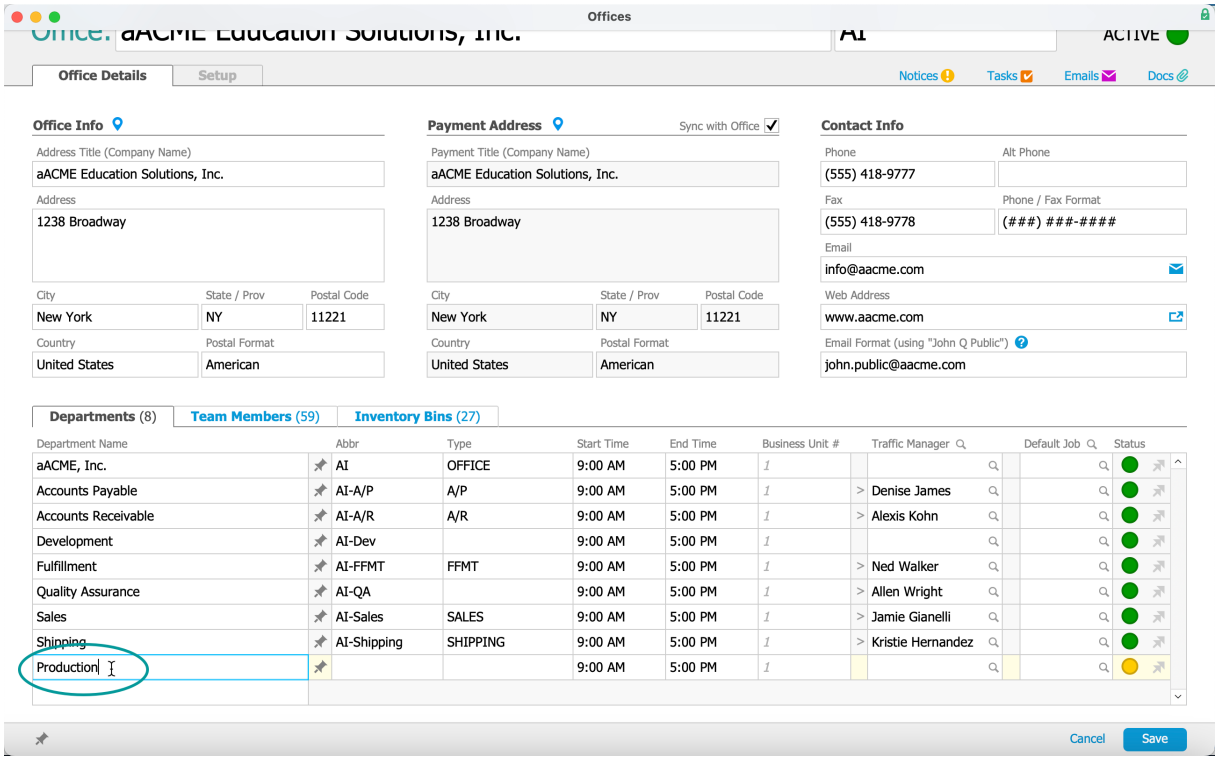


Office	Type	Name	Abbr	Start Time	End Time	Traffic Manager	Default Job	Status
> AI	OFFICE	aACME, Inc.	AI	9:00 AM	5:00 PM			ACTIVE
> AI	A/R	Accounts Receivable	AI-A/R	9:00 AM	5:00 PM	> AK		ACTIVE
> AI	A/P	Accounts Payable	AI-A/P	9:00 AM	5:00 PM	> DJ		ACTIVE
> AI	FFMT	Fulfillment	AI-FFMT	9:00 AM	5:00 PM	> NW		ACTIVE
> AI	SALES	Sales	AI-Sales	9:00 AM	5:00 PM	> JG		ACTIVE
> AI	SHIPPING	Shipping	AI-Shipping	9:00 AM	5:00 PM	> KH		ACTIVE
> MWRO	OFFICE	Midwest Regional Outlet	MWRO	9:00 AM	5:00 PM			ACTIVE
> MWRO	A/R	Accounts Receivable	MWRO-A/R	9:00 AM	5:00 PM			ACTIVE
> MWRO	A/P	Accounts Payable	MWRO-A/P	9:00 AM	5:00 PM			ACTIVE
> MWRO	FFMT	Fulfillment	MWRO-FFMT	9:00 AM	5:00 PM			ACTIVE
> MWRO	SALES	Sales	MWRO-Sales	9:00 AM	5:00 PM			ACTIVE
> MWRO	SHIPPING	Shipping	MWRO-Shipping	9:00 AM	5:00 PM			ACTIVE
> EE	OFFICE	Education Elite	EE	9:00 AM	5:00 PM			ACTIVE
> EE	A/R	Accounts Receivable	EE-A/R	9:00 AM	5:00 PM			ACTIVE
> EE	A/P	Accounts Payable	EE-A/P	9:00 AM	5:00 PM			ACTIVE
> EE	FFMT	Fulfillment	EE-FFMT	9:00 AM	5:00 PM			ACTIVE
> EE	SALES	Sales	EE-Sales	9:00 AM	5:00 PM			ACTIVE
> EE	SHIPPING	Shipping	EE-Shipping	9:00 AM	5:00 PM	> JC		ACTIVE
> EE		Workshops	EE-Workshops	9:00 AM	5:00 PM			ACTIVE
> AI		Quality Assurance	AI-QA	9:00 AM	5:00 PM	> AW		ACTIVE
> AI		Development	AI-Dev	9:00 AM	5:00 PM			ACTIVE
> ABS	Office	aACME Building & Supplies	ABS	9:00 AM	5:00 PM			ACTIVE

To create a new department, you must edit the relevant office record. This ensures that offices and departments are always connected. You can also import (https://aace6.knowledgeowl.com/help/importing-records) departments.

1. From the Main Menu, go to **Internal** > **Offices**.
2. Use the Quick Search bar to locate the office, then select the **Go-To icon** (>).
3. Select **Edit**.

4. In the Departments tab, enter the new department title at the bottom of the list.
   The remaining department fields become active after you enter a department title.



5. Enter the remaining department information:
   - **Abbr** — Enter a recognizable abbreviation (e.g. NY-CS could represent the New York office's Customer Service group).
   - **Type** — Select the appropriate department type.
   - **Start Time & End Time** — Specify the hours of operation for the department. The Start Time and End Time affect other system logic that calculates completion times for task and job assignments in production.
   - **Business Unit #** — Specify numbers here to group departments for financial reporting (e.g. Balance Sheet, Income Statement)
   - **Traffic Manager** — Specify the person managing transactions for this department. New records for certain department types will be automatically assigned to this person.
   - **Default Job** — Specify the default job record. aACE automatically assigns the department to job for new records of the related Type.
     For details specific to your workflows, discuss this functionality with your system administrator or aACE Representative.
6. Select **Save**.

Department Types

The value list in the Type field has specific assignment logic for the default department types. It determines which designated traffic manager (TM) aACE will initially assign to various records. Users can manually update the initial, automatic record assignment.

- **Office** — This department is automatically assigned to users who click the Main Menu link to switch offices (https://aace6.knowledgeowl.com/help/understanding-the-can-switch-offices-user-group-preference). Only one department can be assigned this Type.
- **Fulfillment** — Assigned all job (https://aace6.knowledgeowl.com/help/understanding-job-assignment-logic) or task (https://aace6.knowledgeowl.com/help/understanding-task-assignment-logic) records
- **Shipping** — Assigned all shipment records (https://aace6.knowledgeowl.com/help/understanding-shipment-department-and-team-member-assignment-logic)
- **Sales** — Assigned all lead records (https://aace6.knowledgeowl.com/help/understanding-lead-department-and-team-member-assignment-logic)
- **A/R** (Accounts Receivable) — Assigned all invoice records (https://aace6.knowledgeowl.com/help/understanding-invoice-department-and-team-member-assignment-logic)
- **A/P** (Accounts Payable) — Assigned all purchase order and purchase records

System administrators can also add new department types by selecting the Type field, selecting Edit..., and entering the new type.