

# Setting Up Departments

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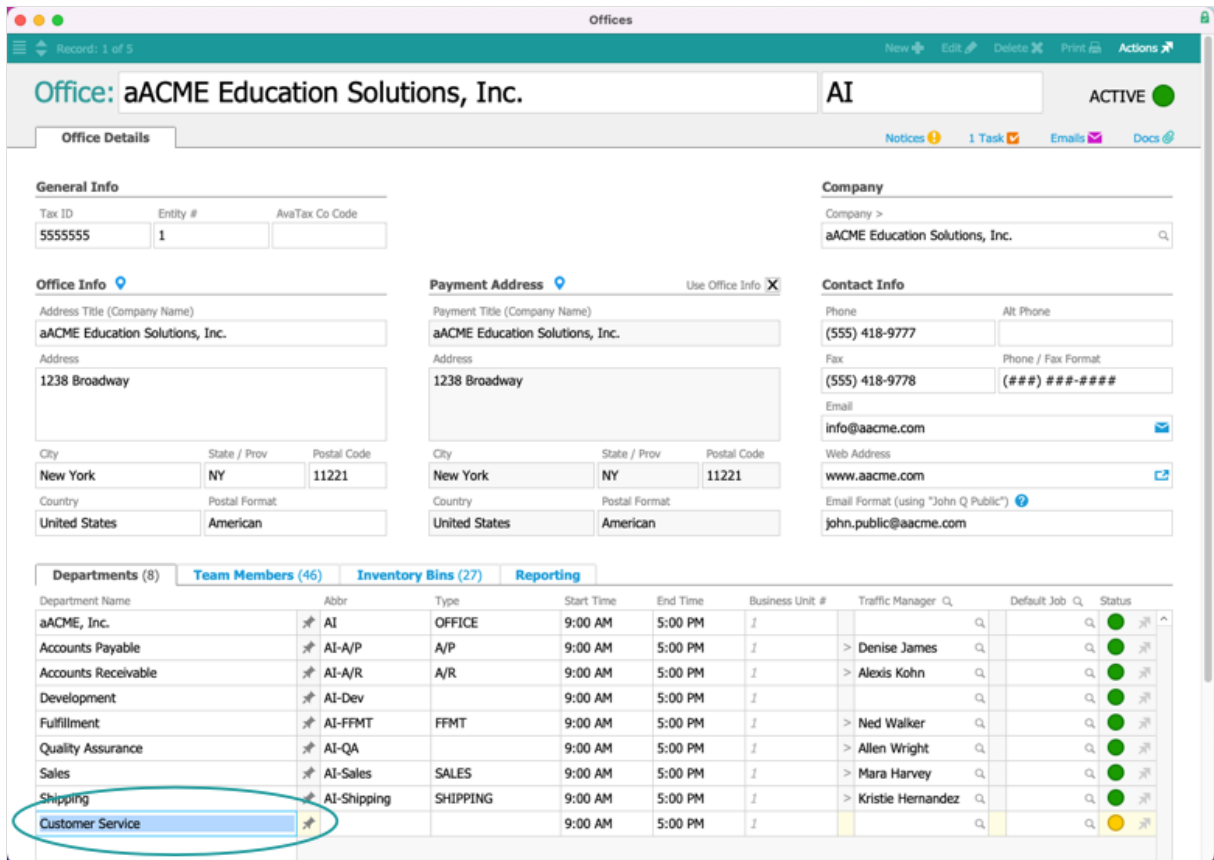
This guide explains how to create and edit departments. It is intended for advanced users.

The Departments module allows system administrators to work with existing department records (Main Menu > Internal > Details > Departments).

To *create* a new department, though, you must edit the relevant *office* record. This helps ensure that offices and departments are always connected. (Note: You can also use the aACE [import tools](https://aace6.knowledgeowl.com/help/importing-records) to import departments.)

1. Navigate from **Main Menu > Internal > Offices**.
2. Locate the desired office and at the detail view, click **Edit**.
3. In the Departments tab, scroll down to show the first empty row, then enter the new department title.

The remaining department fields become active.



4. Enter the remaining department information:
  - o **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 (see below for details).
- **Start Time & End Time** – Specify the department's hours of operation.

Note: These settings affect other system logic that calculates completion times for task and job assignments.

- **Business Unit #** – Specify numbers here to group departments for financial reporting (e.g. Balance Sheet, Income Statement)
- **Traffic Manager** – Specify the person in charge of managing transactions for this department. New records for certain department types will be automatically assigned to this person (see below for details).
- **Default Job** – Specify the default job record. This will automatically be set as the assigned job for new records of the related Type.

Note: For details specific to your workflows, discuss this functionality with your system administrator or aACE partner.

5. Click **Save** (if the office has many departments, you may need to scroll down).

## Department Types

The value list in the Type field has built-in logic for the default department types. It determines which designated traffic manager (TM) aACE will initially assign to various records. Users can manually over-ride 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) (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 records
- **Shipping** – Assigned all shipping records
- **Sales** – Assigned all lead records
- **A/R (Accounts Receivable)** – Assigned all invoice records
- **A/P (Accounts Payable)** – Assigned all purchase order and purchase records

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