

# Overview of Offices

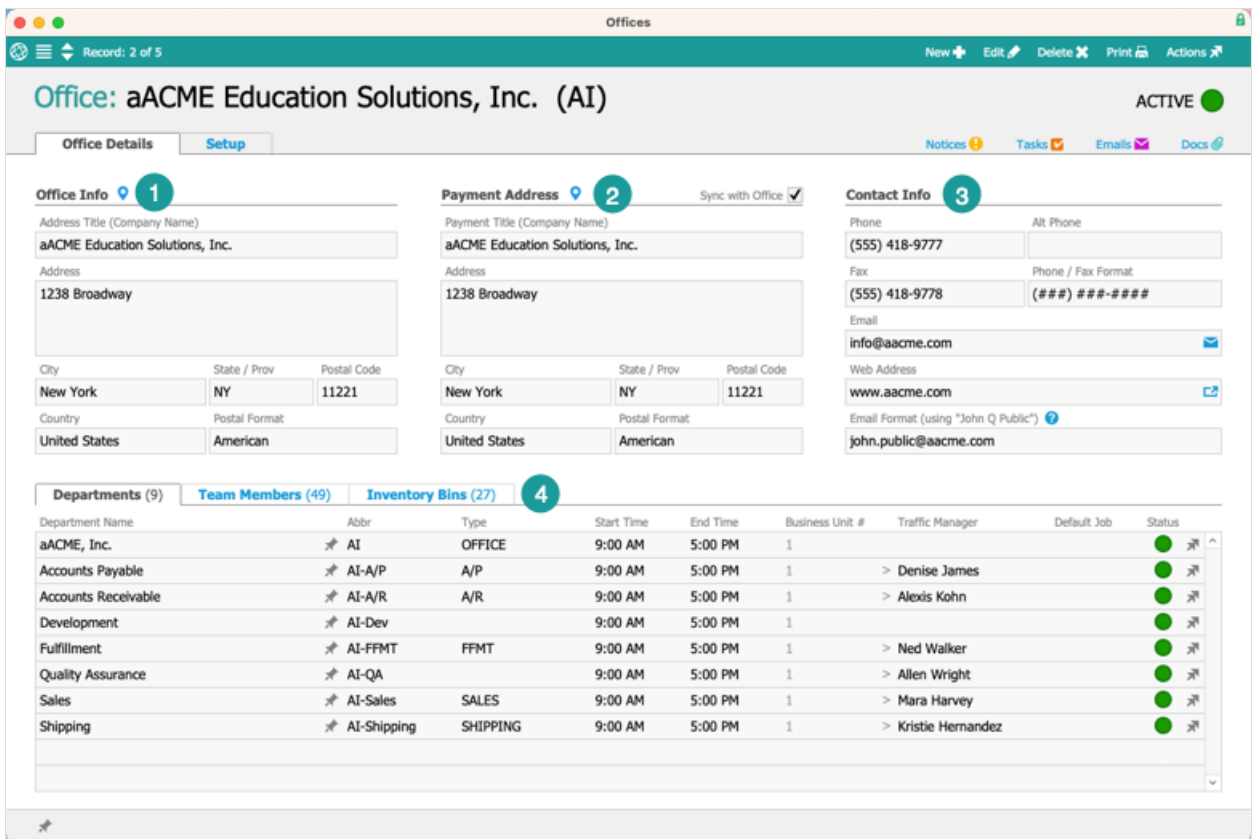
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This guide provides an overview of the Offices module. It is intended for advanced users.

An office in aACE can be used for a separate business entity or a separate location for a single agency. Each office record can have its own set of departments, team members, traffic managers, inventory bins, and report branding.

To create new offices, navigate from Main Menu > Internal > Offices > New, then enter information for the required fields (i.e. Office Name, Office Abbr, Tax ID, Address Title, Address Street, Address City, Postal Code).

## Overview of Office Details



### 1. Office Info



The Office Info section allows you to enter the office's primary address. The Location icon (📍) opens a web browser to view the address in Google Maps.


## 2. Payment Address

Record the address where payments to the office are received in this section. You can transfer the address data from the Office Info section by marking the Sync with Office flag. Clear this flag to enter a separate address.

## 3. Contact Info

Contact Info contains phone, fax, email, and web contact information for the office. It also shows formatting conventions for those fields.

You can click the Email icon (  ) to create a new email. aACE opens a new email draft in your email application with the specified email address in the "To" line. Similarly, when you click the Web Address icon (  ), aACE opens the linked web address in a web browser.

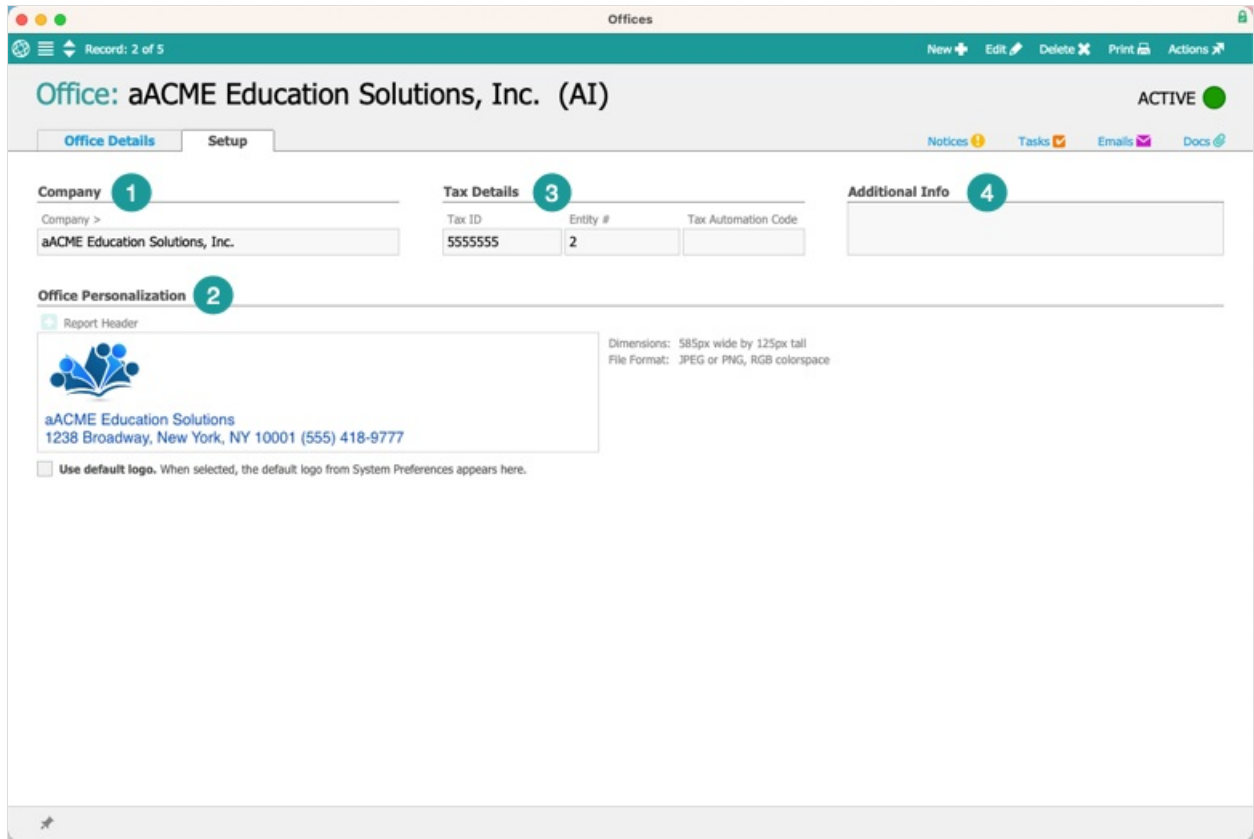
The Help icon (  ) displays instructions for setting the format for this office's email addresses.

## 4. Tabs for Departments, Team Members, and Inventory Bins

On these tabs, you can:

- Create [departments](https://aace6.knowledgeowl.com/help/setting-up-departments) within the office
- View and assign [team members](https://aace6.knowledgeowl.com/help/managing-a-team-members-status-office-and-department) to the office
- Manage [inventory bins](https://aace6.knowledgeowl.com/help/setting-up-inventory-bins) for that location


## Office Setup Tab Overview



## 1. Company

You can link an aACE company record to the office record by specifying that organization here.

## 2. Office Personalization

aACE allows offices to have their own specific branding. You can upload an office-specific report header by clicking Edit in the module header, then clicking the Add icon (  ).

If your office uses a default logo, mark the 'Use default logo' flag. Marking this flag tells aACE to use the default logo specified in Internal > Management Preferences > [Branding](https://aace6.knowledgeowl.com/help/overview-of-branding-preferences) (<https://aace6.knowledgeowl.com/help/overview-of-branding-preferences>).

## 3. Tax Details

Records the office's tax information, including tax ID, entity number, and tax automation code.

## 4. Additional Info

A text field where you can record additional information about the office's setup.

## Switching Between Offices

When team members log in to aACE, their current office assignment is noted by the office initials at the bottom of the [Main Menu](https://aace6.knowledgeowl.com/help/overview-of-the-main-menu). This limits which records the team member can work with. For example, when a team member creates an order, only the line item codes associated with the *current* office are visible for selection.

If you configure the needed [User Group preferences](https://aace6.knowledgeowl.com/help/understanding-the-can-switch-offices-user-group-preference), team members assigned to multiple offices can easily [switch between offices](https://aace6.knowledgeowl.com/help/switching-between-offices).

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