SOP DEFINING BRANCHES

MEDATECH

FUTURE PROOF YOUR BUSINESS

MEDATECH

FUTURE PROOF YOUR BUSINESS

SOP DEFINING BRANCHES

TABLE OF CONTENTS

AIMS

- To divide the system into various company branches and distinguish between financial and inventory transactions recorded in the various branches.
- To assign employees to branches and define each employee's regular office hours at each branch. These definitions can then be used to schedule shifts for employees at the designated branches.

SETUPS

- Define warehouses in the system.
- Define cashiers.
- Define profit/cost centres.
- Define appointment durations.
- Define task codes.
- Define task types.
- Define reasons for cancelling shifts.

PROCEDURE

STAGE ONE: OPENING A BRANCH

1. Enter the Branches form.
2. Define a Branch Code.
3. Record a Branch Name.
4. Record the relevant information in the Address and Phone tab.
5. Click the Branch Details tab and link the appropriate Warehouse to the branch.
6. In the Branch Identifier column, record a code (using letter and/or numbers) that will identify the branch. This code will be integrated in the numbers of transaction documents recorded for the branch, after you run the Open Numeration Templates program.
7. If you work with walk-in customers, you can assign a different one to each branch. To do so, specify the appropriate A/R account in the Branch Walk-in Cust column. This customer will appear automatically as the default in any transaction recorded by any user associated with this branch. Note: Make sure that multiple walk-in accounts have been set up.
8. Click the Financial Data tab and fill in the Branch Cashier, Ret'd Checks Cashier and Profit/Cost Centre columns.
9. To view the employees linked to a given branch, enter the Branch Employees sub-level form. Note: Employees are linked to a branch in the Company-Specific Information form, a sub-level of the Personnel File.

RESULTS

- Inventory transaction documents opened in a given branch automatically display the warehouse defined for the branch to which the employee who opened the document is linked.
- Designating a warehouse in a customer shipment or invoice automatically links the document to the branch for which that warehouse is defined, provided that the employee who opened the document, or the customer for which the document was opened, is not linked to a different branch.
- When you open a document for a given branch, the document number will begin with the branch identifier. In this manner you can distinguish easily between branch documents and prevent duplication.
- Financial documents opened by employees linked to a given branch automatically display the cashier defined for that branch.
- The profit/cost centre defined for a branch appears automatically in all documents opened for that branch.

STAGE TWO: ASSIGNING EMPLOYEES TO BRANCHES

1. Enter the Branches form. Retrieve the branch in question.

2. Enter the Employees in Branch sub-level form and indicate the user name of each employee who works at this branch. For each employee, specify the default Appointment Duration, Task Code and Task Type to be assigned to tasks opened by this user at the current branch.

3. Move to the Work Hours at Branch sub-level form to record regular office hours for the current employee and branch.

4. To define the frequency (in weeks) at which a shift should be scheduled for this employee and branch during the specified office hours on this day of the week, record the desired value in the Frequency (Weeks) column.

Tip: You can also use the Branch Employees form to view or update the list of employees that work in different branches.

RESULT

A list of branch employees, and their regular office hours at each branch, has been defined in the system, together with default definitions for tasks that are opened for these users.

STAGE THREE: SCHEDULING SHIFTS FOR BRANCH EMPLOYEES

1. Run the Create Shifts program.
2. In the program input, specify the branch at which to schedule the employee shifts, the range of dates during which to schedule shifts and the user name of the employee for whom to schedule shifts.

RESULTS

- Shifts are recorded for the designated employee and branch in the Employee Shifts form, based on the office hours defined for the employee and branch in the Work Hours at Branch form.
- Appointments that are created for each employee (in the Appointment Calendar) are scheduled according to employee shifts.

STAGE FOUR: CANCELING SHIFTS FOR BRANCH EMPLOYEES

1. Enter the Employee Shifts form and retrieve the shift(s) to be canceled.
2. Flag the Canceled column and choose the relevant Cancellation Code.

RESULT

Canceled shifts do not appear as available time slots in the Appointment Calendar.