



**Overview & Objective** – The purpose of this I M & U is to demonstrate how to add Departments and associate those Departments with parent entities. Department association allows users to filter reports.

**Initial Navigation** – To navigate to the Departments List (from the Accounting Console):

1. Go to the Applications dropdown (upper right hand corner)
2. Select the Company Module
3. Once in the Company Module go to the Records dropdown (middle dropdown on the screen)
4. Select the Record “Departments”
5. Click the “Add” button in the upper right hand corner of the screen

**Adding Departments** – The title “Department Information” should appear in the upper left hand corner, entry as follows:

- **Department ID** – Enter an ID that’s consistent with the naming scheme used to date. Generally, the scheme is alpha-numeric using three letters followed by two digits (E.G. “PLC01”)
- **Department Name** – Name the Department for easy recognition in other screens.
- **Parent ID** – If the Department has an association, select that Department from the Parent ID dropdown. In the case of association, the new Department is considered a “Child” of the “Parent” Department. If the Department is a root –meaning it has no ancestors—then do not select from the dropdown.
- **Manager** – If needed, select a Manager from the Manager dropdown.
- **Status** – Select “Inactive” if the Department is no longer used.

**Using Departments** – Once Departments have been added there is a required association for each transaction and journal entry entered in the system. The association is made by selecting from the Departments dropdown found in all transaction and journal entry screens.

**\*Use of the Term Department** – As Intacct allows terminology to be changed some companies wish to use a different term than “Department.” Terminology that often replaces the use of “Department” include “Vertical,” “Group” or “Industry.”

**Further Instruction & Use** – For further information regarding Departments or Department association contact your Account Executive or call The NDH Group, Ltd. at 312.461.0505.