Create Departments

In Equitrac

Instructor Led Training
Chapter 3 – Exercise B

Topics include:

- Manually Create a Department
- Enable Department Charging

Manually Create a Department

NOTE: In order to be able to complete future exercises, please use the information provided below exactly as shown; do not make any substitutions or skip any of the entries.

1. Start **Equitrac System Manager** and connect to your accounting server.

2. In the left pane, click [Departments].

3. In the right pane, right-click in the white area and then click **Add department**.

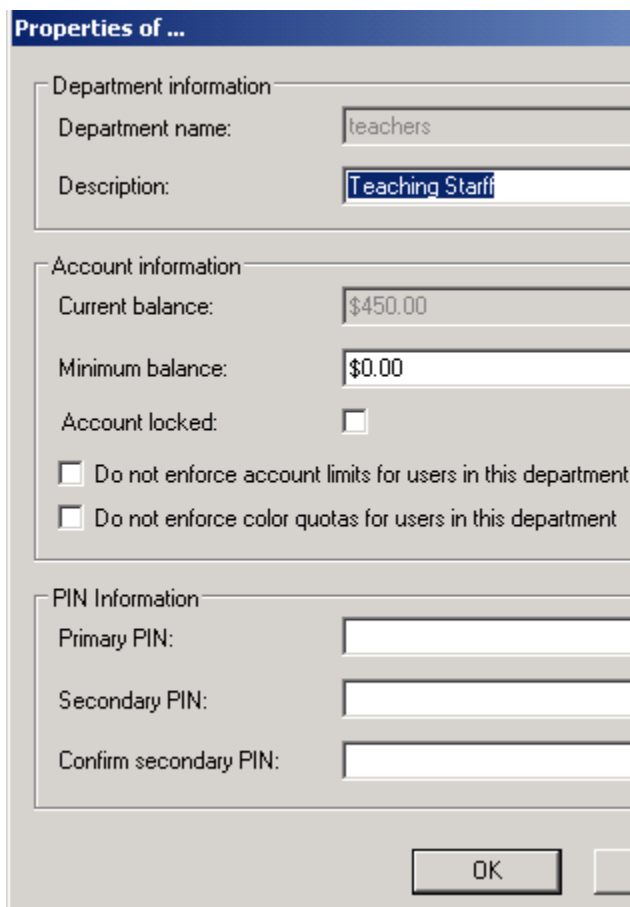4. In the Add Department dialog box, type the following information:

    Department Name: **teachers**
    Description: **Teaching Staff**
    Current balance: **$450**
    Minimum balance: **-1.00**

    NOTE: Billing Codes will be assigned in a future exercise.

5. Click the [OK] button to create the department.

6. Create another department using the following information:

    Department Name: **administrator**
    Description: **Principal & Secretary**
    Current balance: **$950**
    Minimum balance: **-1.00**
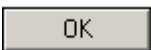
Enable Department Charging

1. In **Equitrac System Manager**, click [Configuration] in the left pane.

2. In the **Accounting** section in the right pane, click **Account charging**.

3. Click to select the **Charge department if available** check box.

4. Click the [OK] button.