

Branches and Tier 2s

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There may be occasions when a tiered structure for certain Resources is required. A tiered structure is where a Head Office or Tier 1 has one or more Branches or Tier 2s underneath it. External Resources are split into to Head Offices and Branches whereas Internal Resources are split into Tiers 1s and Tier 2s.

To set up a Branch, select an External Resource from the Resource List and click the "Create Branch" button.

1. The New Branch screen is displayed once "Create Branch" has been selected. The main differences between this and the Head Office Resource screen is that the majority of information on this screen is inherited from the Head Office Resource. This is shown below:

Resource Details		External (Branch)		Financial	
Resource Number	<input type="text"/>			<input type="checkbox"/> Is VAT Exempt?	
Resource Name	21st Century Lifts Ltd Branch	Open Head Office...		VAT Number	672 8952 87
Website URL	<input type="text"/>	Open Link		VAT Codes	Standard (Preferred)
Resource Type	<input checked="" type="checkbox"/> Is Contractor? <input type="checkbox"/> Is Supplier? <input type="checkbox"/> Is Repair Agent? <input type="checkbox"/> Is Manufacturer? <input type="checkbox"/> Is Consultant? <input type="checkbox"/> Is Lease/Hire?			Tax Type Code	<input type="text"/>
PQQ Expiry Date	14/06/2012			Accounts Code	<input type="text"/>
Clients	Currently 5 clients selected			<input checked="" type="checkbox"/> HO to pay all invoices incl. branches <input type="checkbox"/> Invoices issued from branch directly	
Work Order Types	LIFT MECHANICAL			Payment Terms	End of Month 75 days 2.5%
Pref. Assign Method	Phone (Manual)			Payment Currency	Great British Pounds
				Credit Limit	£0.00
Company Information					
Company Type	Private Limited Company	Company Registration	3291928		
Timezone	(UTC) Dublin, Edinburgh, Lisbon, London				
CIS Information					
CIS Status	<input checked="" type="radio"/> Gross <input type="radio"/> Net <input type="radio"/> N/A				
CIS Name	<input type="text"/>	CIS Verification No	<input type="text"/>		
Date Matched	<input type="text"/>	Unique Tax Reference	<input type="text"/>		

Some of the populated fields can still be changed, such as VAT information and the Assignment Method, whilst others cannot be changed as they are reliant on the Head Office. The Work Order Types field only contains the WO Types that the Head Office has assigned to it, meaning that Branch will only ever be able to perform the same work. However, if the Head Office has multiple WO Types, the Branch does not necessarily have to include all those types. The Branch could only perform one of the Work Order Types if that is what the branch will be used for. There is also a button that links to the branches Head Office in case Users need to access the Resource information.

Once all information has been entered, click "Next" to proceed.

2. As with the Head Office Resource, enter the Address details of where the Branch is located. Once done, click "Next" once again to proceed.

3. Lastly is the Resource Contacts screen. This is where all information on the contacts for the Resource are stored. Resource contacts are displayed by their Contact Name, Job Title, Type, State and Login Type. Contacts for Resources are added within the People section and cannot be modified through the Resources page. For more information, see the [People and Profiles](#) page.

4. When ready, click "Finish" to create the Resource Branch.

To set up a Tier 2, select an Internal Resource from the Resource List and click the "Create Tier 2" button.

1. The New Tier 2 screen is displayed once "Create Tier 2" has been selected. The main differences between this and the Tier 1 Resource screen is that the majority of information on this screen is inherited from the Tier 1 Resource. This is shown below:

Resource Details		Internal (Tier 2)
Resource Number	<input type="text"/>	
Resource Name	Tier 2	Open Tier 1...
Clients	Currently 1 clients selected	
Work Order Types	BUILDING FABRICATION CASH OFFICE CATERING CHECKOUT	
Pref. Assign Method	Email (Automatic)	

Notes

All fields are inherited from the Tier 1 Resource but can be modified (works the same as creating a Branch). Again, the Work Order Types field only contains the WO Types that the Tier 1 has assigned to it but the Tier 2 does not necessarily have to have all of the Work Order Types assigned to them. To find out what the Tier 1 for the Branch is, there is a button in the Resource name field that opens the Tier 1.

Once all information has been entered, click "Next" to proceed.

2. As with the Tier 1 Resource, enter the Address details of where the Tier 2 is located. Once done, click "Next" once again to proceed.

3. Lastly is the Resource Contacts screen. This is where all information on the contacts for the Resource are stored. Resource contacts are displayed by their Contact Name, Job Title, Type, State and Login Type. Contacts for Resources are added within the People section and cannot be modified through the Resources page. For more information, see the [People and Profiles Introduction](#) page.

4. When ready, click "Finish" to create the Tier 2 Resource.

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