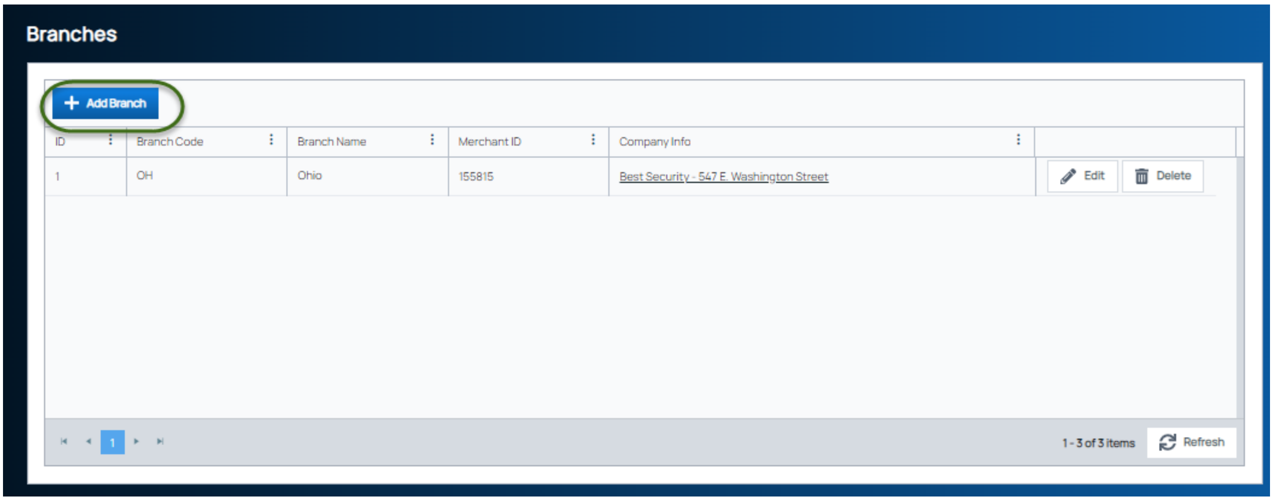
Add a Branch

Last Modified on 09/16/2024 9:24 pm EDT

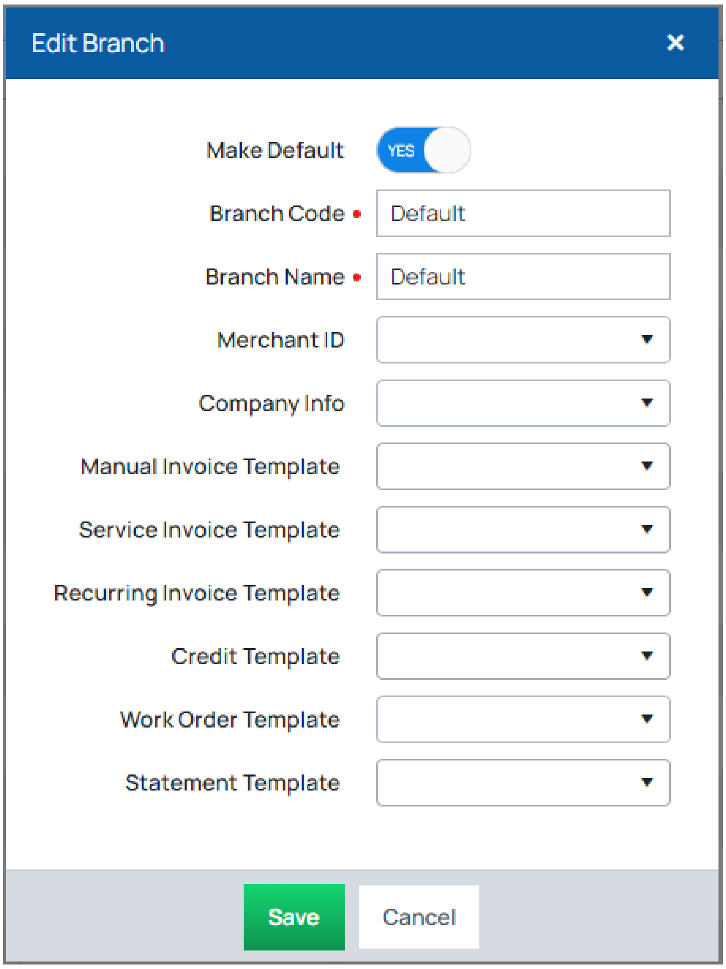
A Branch is any grouping of G/L data within the Company, such as a remote office, acquisition, or even another entity Branches are used primarily for financial reporting purposes. You must create at least one Branch record.

From the main menu, arrive at the Branches setup with this path: GL > Branches.

The Branches list is displayed. Click the **Add Branch** button at the upper left of the page.



The Add Branch form is displayed. Each data entry field is described below.



- **Make Default**: If this branch should be the default, click the switch to YES. There can be only one default branch. The default branch cannot be deleted.
- **Branch Code**: Type in a name or a number for the branch. Maximum 25 characters. (required)
- **Branch Name**: This is a longer description of the branch. Maximum 50 characters. (required)
- **Merchant ID**: This will auto-fill with the Merchant ID that is set up as the default in the setup table eCheck/Credit Card. If your company has more than one Merchant ID, make a selection from the drop-down list
- **Company Info**: Select the company the branch is related to. On the Branches page, in the grid, this is a link to the Company Info page.
- **Manual Invoice Template**: Select a template for the branch manual invoices. These come from Setup > Utilities > Template Engine.
- **Service Invoice Template**: Select a template for the branch service invoices. These come from Setup > Utilities > Template Engine.
- **Credit Template**: Select a template for the branch credits. These come from Setup > Utilities > Template Engine.
- **Work Order Template**: Select a template for the branch work orders. These come from Setup > Utilities > Template Engine.
- **Statement Template**: Select a template for the branch statements. These come from Setup > Utilities > Template Engine.

When finished, click **Save**.