

CLASS INFORMATION

Title: Adding a Branch to the MoversSuite Data Base

Date: Thursday, July 1, 2010

Time: 1:00 p.m. (MDT)

To join this webcast click on the following **LiveMeeting** icon:



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CLASS OUTLINE

Adding Branches to the MoversSuite Database

Topic #1 Adding a Branch to the MoversSuite Database

- Reason for adding a branch
- When is MoversSuite Assistance Required to Add a Branch

Topic #2 Setup Requirements

- Verify or Add new agency
- Add New Branch
 - Branch GL Code
 - Company GL Code
 - Control Code for the GP Database
 - Provide Branch Logo
 - If dispatched by a common dispatcher, enter the code for that location is Dispatching Common View
 - In Contacts tab enter the appropriate branch Address Types.
- Set Sister Agency branch in Agents table for the New Branch
- Define Order Numbers and Move Types for the New Branch
 - Create a new order number
 - Create a new move type
- Associate Personnel to the New Branch

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- Define Security for the New Branch
- Define Local Services for the new branch
- Define the Cash Receipt Numbers for the New Branch
- Define PM Posting Account for the New Branch
- Define Branch Divisions for the New Branch
- Define the Invoice Terms for the New Branch
- Define Customer Invoice Requirements for the New Branch
- For the imports and exports from the van line and TechMate in the XmlInterfaceBranch
- Define IGC Tables for the New Branch
- Setup any new transportation Equipment for the new Branch.