Profit Centers/Departments

Document #:	3001	Product:	CenterPoint®

Profit centers/Departments describe the various areas or divisions of your operation that generate income. It can also be used for department tracking. Profit center/Department detail is for analysis purposes, it does not affect tax information. When you look at the profit/loss of your operation for any given time span, profit centers/departments give you the power to pinpoint the status of each specific part of your operation.

A profit center/department is not assigned to an account, but instead the profit center/department can be assigned to each line of any transaction, using any account.

Create a Profit Center/Department
Edit/Change an Existing Profit Center/Department
Delete an Existing Profit CenterDepartment
Change the Status (Activate/Deactivate) of an Existing Profit Center/Department
Combine Two Existing Profit Centers/Departments

Create a Profit Center/Department

1. On the **Setup** menu, point to **Profit/Production Centers** or **Departments/Locations**, and then click **Profit Center** or **Department**.
2. Click **New**.

Note: If you would like to create a new item by copying an existing one, highlight the profit center/department to copy from and click **Copy**. If the copy option is used, all fields listed below will auto-filled with the information from the original profit center/department, but can be modified.

3. In the **Abbreviation** box, enter optional information that you can use to easily identify the profit center/department by.
4. In the **Name** box, enterrequired information that describes the profit center/department.
5. In the **Type** box, click and select the type of profit center/department.
6. To add notes to this profit center/department, click **Additional Notes**, enter the notes, and then click OK.

Note: To add a time stamp to a note added or edited on the Additional Notes screen, click **Stamp**. If you are adding/editing a stamp in a database without security, the stamp will display "Edited on (current date and time)". If you are adding/editing a stamp in a database with security, the stamp will display "Edited by (username) on (current date and time)".

7. Click **Save** to save the profit center/department and return to the List tab, or click **Close** to save the profit center/department and close the profit center/department screen.

Edit/Change an Existing Profit Center/Department

All information on an existing profit center/department can be modified. All history and balances will stay with the profit center/department

1. On the **Setup** menu, point to **Proft/Production Centers** or **Departments/Locations**, and then click **Profit Center** or **Department**.
2. Select the profit center/department to be changed and click **Edit** (or simply double click on the appropriate profit center/department. Edit the details as needed.

3. Click **Save** to save the profit center/department and return to the List tab, or click **Close** to save the profit center/department and close the profit center/department screen.

Note: To return to the List tab without saving the profit center/department, click **Cancel**.

Delete an Existing Profit Center/Department

The Delete button completely removes a profit center/department from the system. Note: You cannot delete a record that has any type of history or other records linked to it in the system. If you have a profit center/department that is no longer being used, but does have historical activity, please refer to the instructions below on how to change the status to inactive.

1. On the **Setup** menu, point to **Proft/Production Centers** or **Departments/Locations**, and then click **Profit Center** or **Department**.
2. Select the profit center/department to be deleted and click **Delete**.
3. At the **Are you sure you want the item delete?** message, click **Yes**.

Change the Status of an Existing Profit Center/Department

Profit centers/Departmentsthat are no longer being used, but have history, can be deactivated. On transaction screens, the list of profit centers/departments will only include active profit centers/departments. Filters can be created in reports, lists, etc. to only include active profit center/departments.

1. On the **Setup** menu, point to **Proft/Production Centers** or **Departments/Locations**, and then click **Profit Center** or **Department**.
2. Right-click on the appropriate profit center/department, and select **Activate** or **Deactivate**.

Combine Two Existing Profit Centers/Departments

The Combine button allows you to combine two existing profit centers/departments. For example, if the same profit center/department was inadvertently setup twice and both used on transactions. The Combine button allows you to combine all history and balances for the two profit centers/departments and removal of one of the profit centers/departments. Note: We recommend you take a backup prior to combining two items as there is not a way to "uncombine" two items.

1. On the **Setup** menu, point to **Proft/Production Centers** or **Departments/Locations**, and then click **Profit Center** or **Department**.
2. Select the profit center/deparment to be changed and click **Combine**. The profit center/deparment selected in this step is the item that will be removed after the two profit centerr/deparments are combined.
3. In the **Combine** screen, select the profit center/deparment it should be combined into and click **OK**.