



23 An overview of business organisations

Business organisations are created to enable transactions between different organisations to take place.

There are three main business organisations, these can exist independently or act in a combination of roles:

1. **Local authority** – users within this organisation type will work for, or be individuals funded by, the local authority.
2. **Budget manager** - responsible for managing the budgets of individuals, a budget manager organisation can be an independent broker or part of a local authority.
3. **Service provider** - a service provider offers services or products that can be purchased by the individual. Service providers can operate independently or be part of a local authority.

A business organisation can only be created by a shop4support Budget Manager system administrator.

A business organisation user with appropriate permissions will be able to edit an organisation's settings in this way:

1. Navigate to the Administration function.
2. Expand the Account set-up folder.
3. Click on Business organisation.
4. Click on the Edit icon.

The screenshot shows the shop4support web application interface. At the top left is the shop4support logo. A user notification bar at the top right says "Hello, rob alger, you are acting as LA BM SP Org User | End act as | Logout Local Authority role Change". Below this is a breadcrumb trail: "You are here: Administration / Account set-up / Business organisations". The main content area has a search bar and a table with one row: "LA BM SP VW" under the "Organisation name" column. An "Edit" button is visible below the table. The footer of the table area shows "Page 1/1" and navigation links: "First page", "Previous page", "Next page", "Last page". A "Refresh" button is in the top right corner of the table area. On the left side, there is a navigation menu with "Business organisations" highlighted.

A business organisation's details are presented across a series of tabs, as detailed below:

Main details tab:

The screenshot shows the 'Main details' tab for a business organisation. The form includes the following fields:

- Head office: Big Head Office
- Organisation name: Lancs County Council
- VAT number: GB-e3244324234
- Telephone: [Empty field]
- Email: lanky@vw.com
- Fax: [Empty field]
- Web site: [Empty field]
- Flat name: [Empty field]
- House name: [Empty field]
- House number: [Empty field]
- Postcode: [Empty field]
- Street: [Empty field]
- Town: [Empty field]

An 'Address search help' box provides instructions: 'For search for an address, there is a minimum requirement to: Enter a Flat name or House name or House number and - either postcode or - Street and Town'. A large grey arrow points from this help box towards the address fields.

Within the Main details tab you will be able to amend the details of your organisation, such as your name, address, and other contact details.

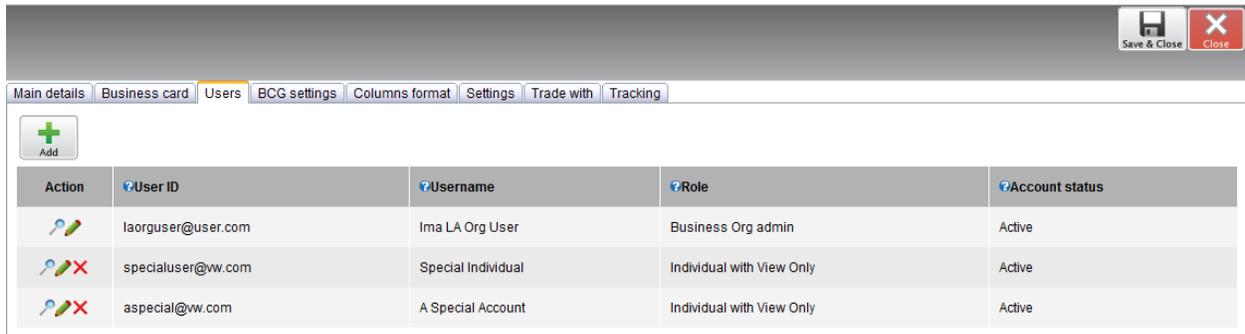
Business card tab:

The screenshot shows the 'Business card' tab. The 'Business card representation' section includes an 'Update' button and a note: 'Information displayed on the business card is taken from Main details tab if the fields are completed and additional information section on this tab and the image displayed or uploaded on this tab'. The preview shows:

- Local authority: Lancs County Council
- Address: 10 Liverpool Road, Preston, Lancashire, PR1 0AD
- Email: lanky@vw.com
- Web site: [Empty field]
- Logo: shop 4 support

The 'Additional information for business card' section includes a 'Free text field' and an 'Image for business card' section with an 'Upload image' button and 'Browse..' and 'Upload' options.

Here, you can upload an image to your business card, such as your organisation's logo. The business card will also contain your organisation's contact details and can be viewed wherever there is a link to your organisation within Budget Manager, enabling others to contact you should they need to.

Users tab:


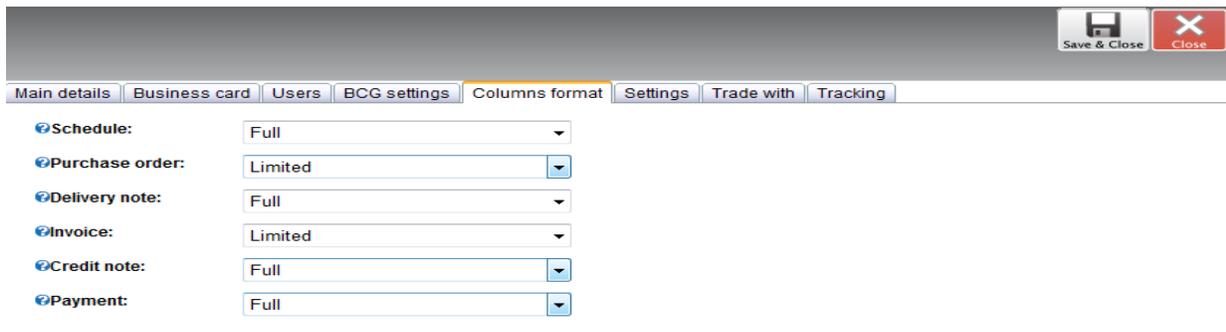
| Action | User ID | Username | Role | Account status |
|--------|--------------------|--------------------|---------------------------|----------------|
| | laorguser@user.com | Ima LA Org User | Business Org admin | Active |
| | specialuser@vw.com | Special Individual | Individual with View Only | Active |
| | aspecial@vw.com | A Special Account | Individual with View Only | Active |

Within the Users tab you can add, remove or amend the details of an individual. You can also reset the user's password and role permissions.

BCG (Buyer Catalogue Group) settings tab:


| | Buyer catalogue group | Local authority | Supplier | Budget Manager |
|-------------------------------------|------------------------|-------------------------------------|--------------------------|--------------------------|
| <input checked="" type="checkbox"/> | A Furry Individual | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <input checked="" type="checkbox"/> | A Primitive Individual | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <input checked="" type="checkbox"/> | Im a Big Individual | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <input checked="" type="checkbox"/> | ImaNoley Individual | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <input checked="" type="checkbox"/> | Indi Vidal | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <input checked="" type="checkbox"/> | Indi Vidual | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <input checked="" type="checkbox"/> | Indi Vidual-Smith | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <input checked="" type="checkbox"/> | Justin Time | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <input checked="" type="checkbox"/> | Lances County Council | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <input checked="" type="checkbox"/> | Public catalogue | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

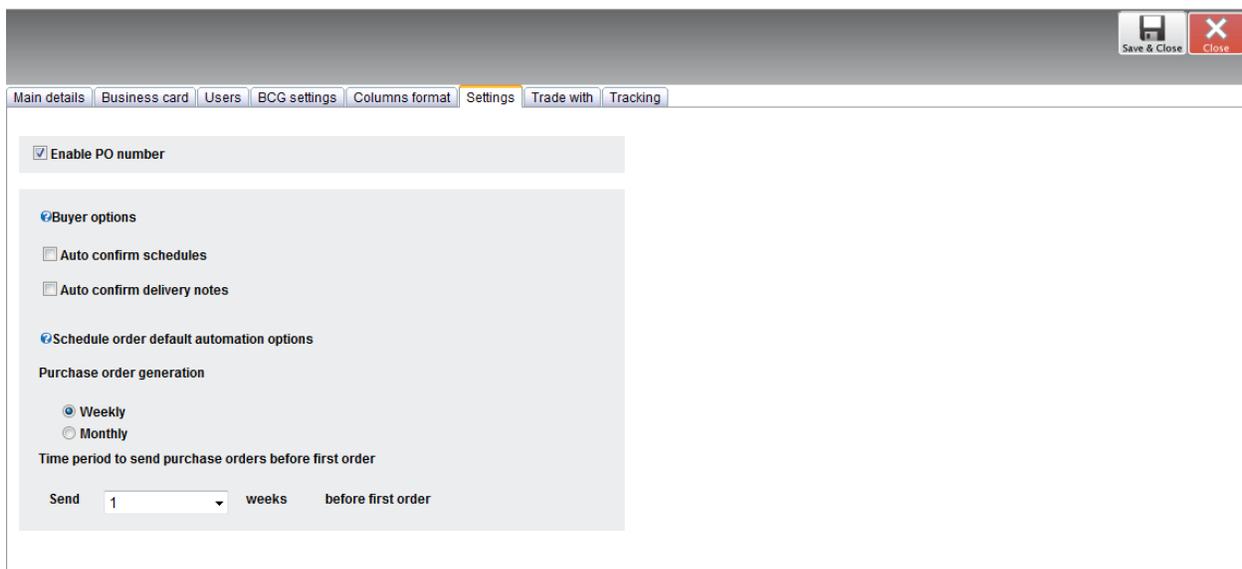
The BCG settings tab displays the buyer catalogue group settings for your organisation, as above.

Columns format tab:

The screenshot shows the 'Columns format' tab in the Budget Manager 2 interface. The window has a title bar with 'Save & Close' and 'Close' buttons. Below the title bar is a tabbed menu with 'Main details', 'Business card', 'Users', 'BCG settings', 'Columns format', 'Settings', 'Trade with', and 'Tracking'. The 'Columns format' tab is active. The main content area contains six rows of settings, each with a blue expand/collapse icon on the left and a dropdown menu on the right:

| | |
|---|---------|
| <input checked="" type="checkbox"/> Schedule: | Full |
| <input checked="" type="checkbox"/> Purchase order: | Limited |
| <input checked="" type="checkbox"/> Delivery note: | Full |
| <input checked="" type="checkbox"/> Invoice: | Limited |
| <input checked="" type="checkbox"/> Credit note: | Full |
| <input checked="" type="checkbox"/> Payment: | Full |

The columns format tab allows you to choose whether or not you wish to have a full or limited view of documents viewed within Budget Manager.

Settings tab:

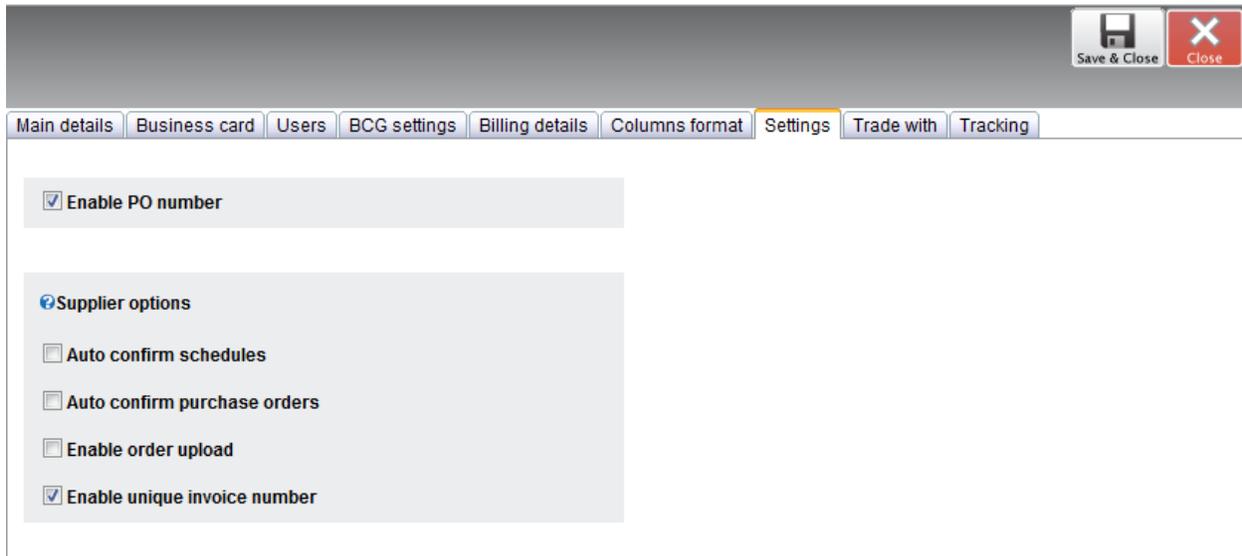
The screenshot shows the 'Settings' tab in the Budget Manager 2 interface. The window has a title bar with 'Save & Close' and 'Close' buttons. Below the title bar is a tabbed menu with 'Main details', 'Business card', 'Users', 'BCG settings', 'Columns format', 'Settings', 'Trade with', and 'Tracking'. The 'Settings' tab is active. The main content area contains several settings:

- Enable PO number
- Buyer options**
 - Auto confirm schedules
 - Auto confirm delivery notes
- Schedule order default automation options
- Purchase order generation**
 - Weekly
 - Monthly
- Time period to send purchase orders before first order**

Send weeks before first order

The Settings tab will look different depending on your organisation type. For example, a buying organisation may choose to Auto confirm schedule orders or Auto confirm delivery notes, as displayed in the screen above. They can also specify a time period for which to send purchase orders before an order is due.

Alternatively, a service provider organisation will be given options specific to tasks that are more relevant to them, as shown in the screen below.



Save & Close Close

Main details Business card Users BCG settings Billing details Columns format Settings Trade with Tracking

Enable PO number

Supplier options

Auto confirm schedules

Auto confirm purchase orders

Enable order upload

Enable unique invoice number

Trade with tab:

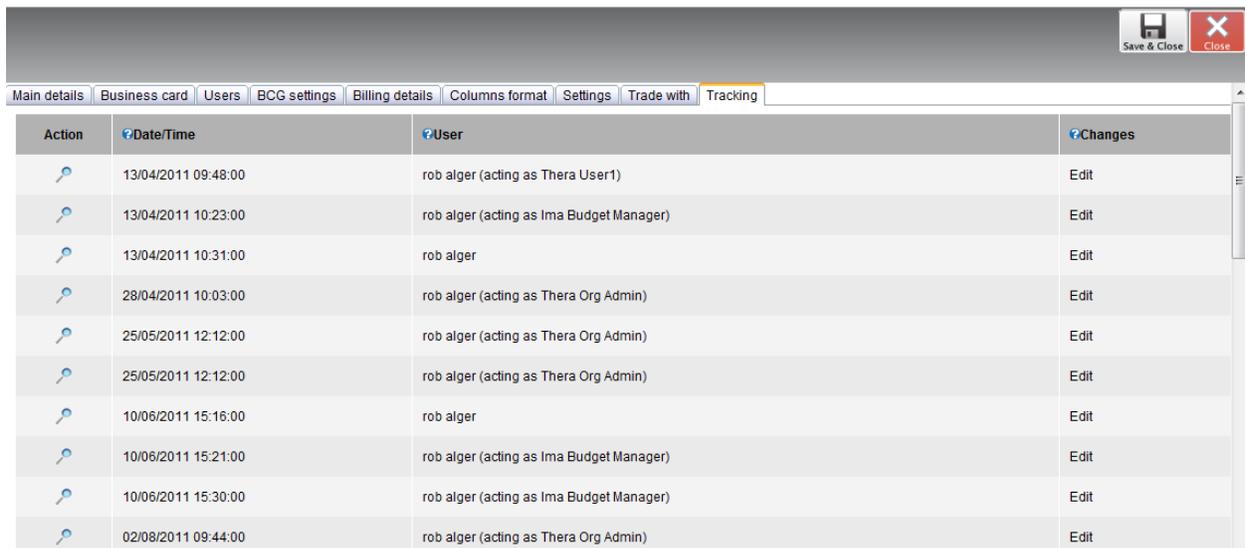


Save & Close Close

Main details Business card Users BCG settings Billing details Columns format Settings Trade with Tracking

| Organisation name | Role | Buyer catalogue group | Buyer account reference |
|---------------------|---|--|-------------------------|
| Rob the Supplier | Service provider role | Public catalogue, Thera, Justanother Individual, Green Behind-The- Gills, APrimitive Individual, Billy T Smart, Individual User [1], Lester City Council, Oran Gutan, Charlie George, Johnny Giles, Billy Bremner, Norman Hunter, Test Individual, Gary Sprake | <input type="text"/> |
| zAA Associates Ltd. | Local authority role, Service provider role | Public catalogue, zAA Associates Ltd., Individual User [2], Oran Gutan, Johnny Giles | <input type="text"/> |
| BB Surplus Prods | Service provider role | Public catalogue, Oran Gutan, Charlie George, Johnny Giles, Norman Hunter, Test Individual, Gary Sprake | <input type="text"/> |

The trade with tab displays a list of your current trading partners and will allow you to add a specific account reference to each of these.

Tracking tab:

| Action | Date/Time | User | Changes |
|---|---------------------|--|---------|
|  | 13/04/2011 09:48:00 | rob alger (acting as Thera User1) | Edit |
|  | 13/04/2011 10:23:00 | rob alger (acting as Ima Budget Manager) | Edit |
|  | 13/04/2011 10:31:00 | rob alger | Edit |
|  | 28/04/2011 10:03:00 | rob alger (acting as Thera Org Admin) | Edit |
|  | 25/05/2011 12:12:00 | rob alger (acting as Thera Org Admin) | Edit |
|  | 25/05/2011 12:12:00 | rob alger (acting as Thera Org Admin) | Edit |
|  | 10/06/2011 15:16:00 | rob alger | Edit |
|  | 10/06/2011 15:21:00 | rob alger (acting as Ima Budget Manager) | Edit |
|  | 10/06/2011 15:30:00 | rob alger (acting as Ima Budget Manager) | Edit |
|  | 02/08/2011 09:44:00 | rob alger (acting as Thera Org Admin) | Edit |

The tracking tab displays a list of any changes made to an organisation within Budget Manager and who made the changes.