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.

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

Main details tab:

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.
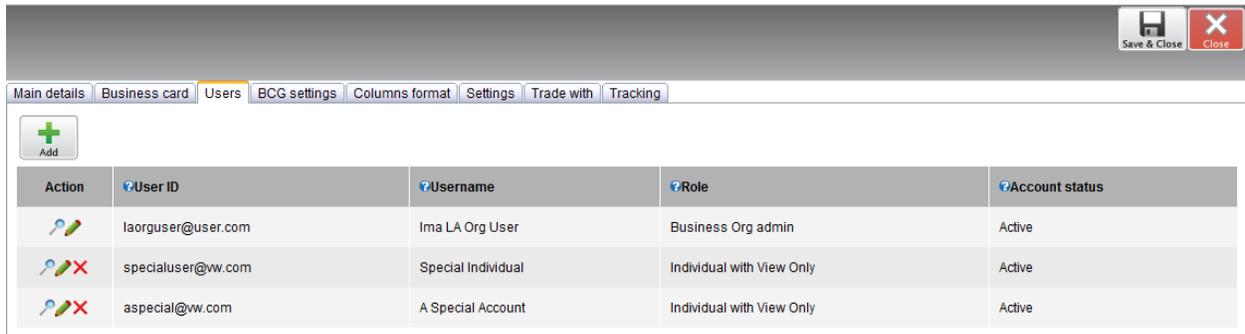
Business card tab:

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.
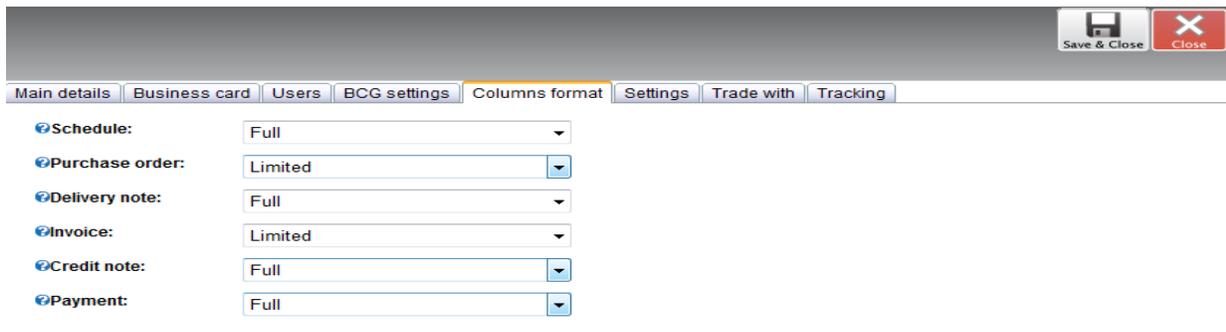
Users tab:

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:

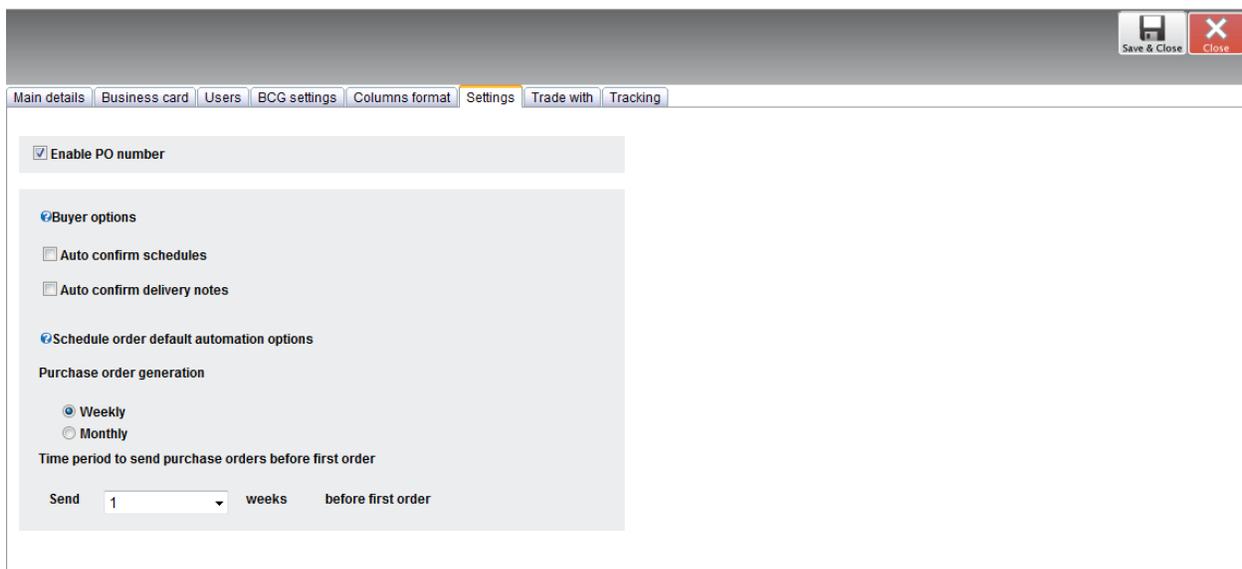The BCG settings tab displays the buyer catalogue group settings for your organisation, as above.

Columns format tab:

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 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.

Trade with tab:

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:
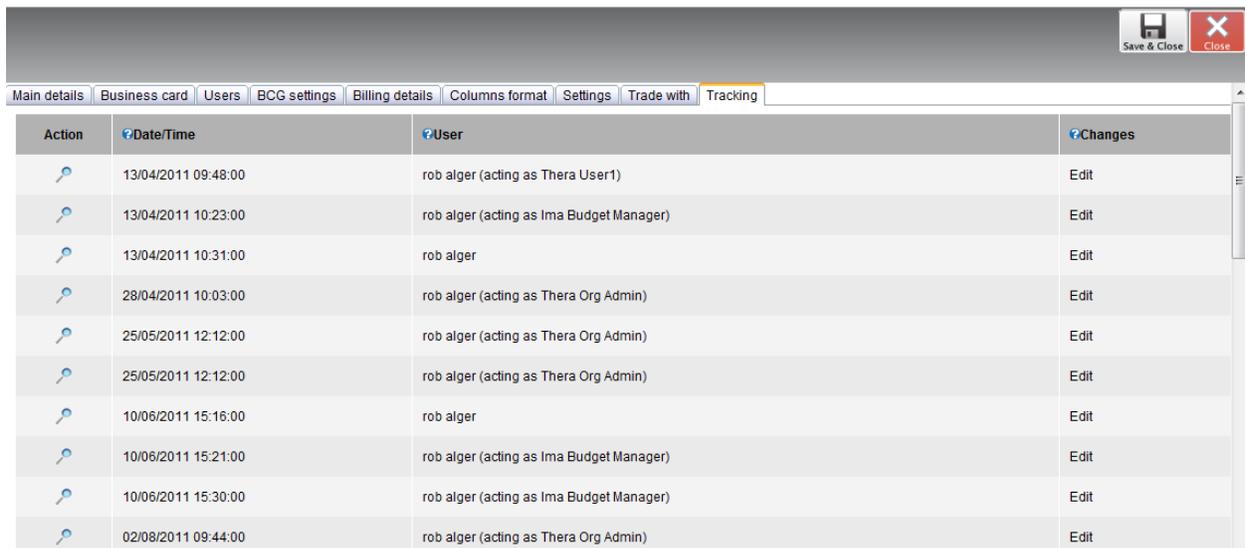
Action	Date/Time	User	Changes
🔍	13/04/2011 09:48:00	rob alger (acting as Thera User1)	Edit
🔍	13/04/2011 10:23:00	rob alger (acting as Ima Budget Manager)	Edit
🔍	13/04/2011 10:31:00	rob alger	Edit
🔍	28/04/2011 10:03:00	rob alger (acting as Thera Org Admin)	Edit
🔍	25/05/2011 12:12:00	rob alger (acting 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.