



31 Head Office overview

The creation of a Head Office enables a group of organisations to report on their data found within Budget Manager.

How to create a Head Office

To create a Head Office, simply follow the steps below:

1. Go to the Administration function.
2. Expand the Account Set-up folder.
3. Click on Head Office organisations.
4. Click on the Add button. You will be directed to Budget Manager's Head Office Wizard.

Using Budget Manager's Head Office Wizard

To use the Head Office Wizard follow the steps below:

1. Main Details

- Input the main details of the head office, including name and address.
- Once you have included all the relevant information, click on the Next button.

2. Billing Details

- Input the billing details of the head office. Please note: Fields marked with an asterisk (*) must be completed.
- Once you have included all the relevant information, click on the Next button.

3. Organisations

- Choose the organisations that you want to include in the head office, by ticking the relevant organisations' selection boxes.
- Once you have selected the relevant organisations, click on the Next button.

4. Users

- Choose the users that you want to include in the head office by ticking the relevant users' selection boxes. You can also deselect users at this stage if you want to omit any.
- Once you have selected the relevant users, click on the Finish button.
- You will be directed to the Create User Wizard.

Please note: It is possible to add any additional users to a head office at a later date.

You can find your saved head office information in the Account Set-up/ Head Office Organisations folder.