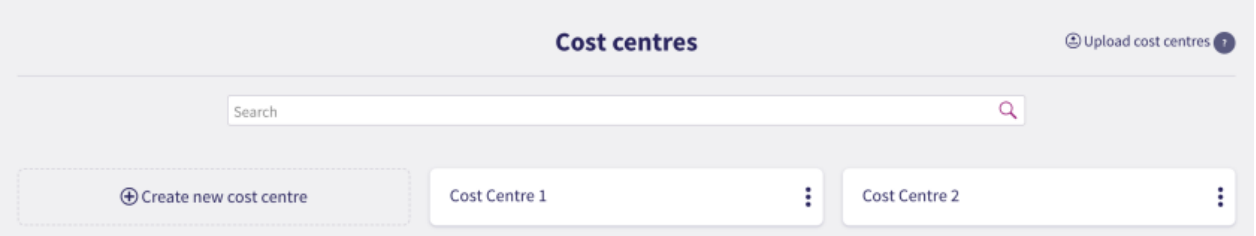
Managing cost centres and cost types

In this section you'll learn how to manage cost centres and cost types, including creating, uploading, assigning, renaming and deleting them.

How to create or upload a new cost centre

Go to 'Organisation' and then to 'Cost centres'.



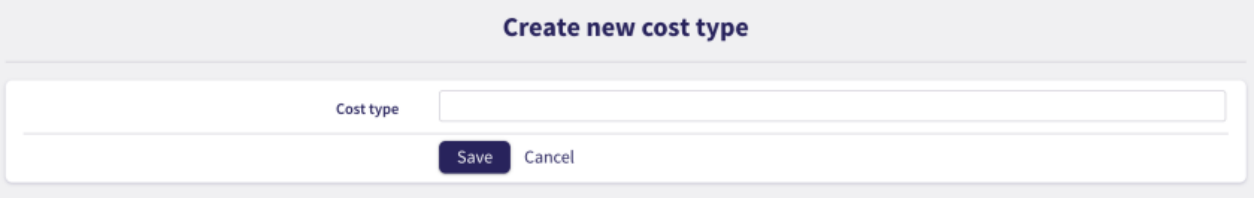
Click on 'Create new cost centre'. Enter a name for your cost centre and click 'Save'.

To upload multiple cost centres at once, select 'Upload cost centres'. This will open a window that displays saved documents on your device or computer. Now upload the document as an Excel file (.xls or .xlsx) or Text file (.txt).

How to create or upload a new cost type

Go to 'Organisation' and then to 'Cost types'.

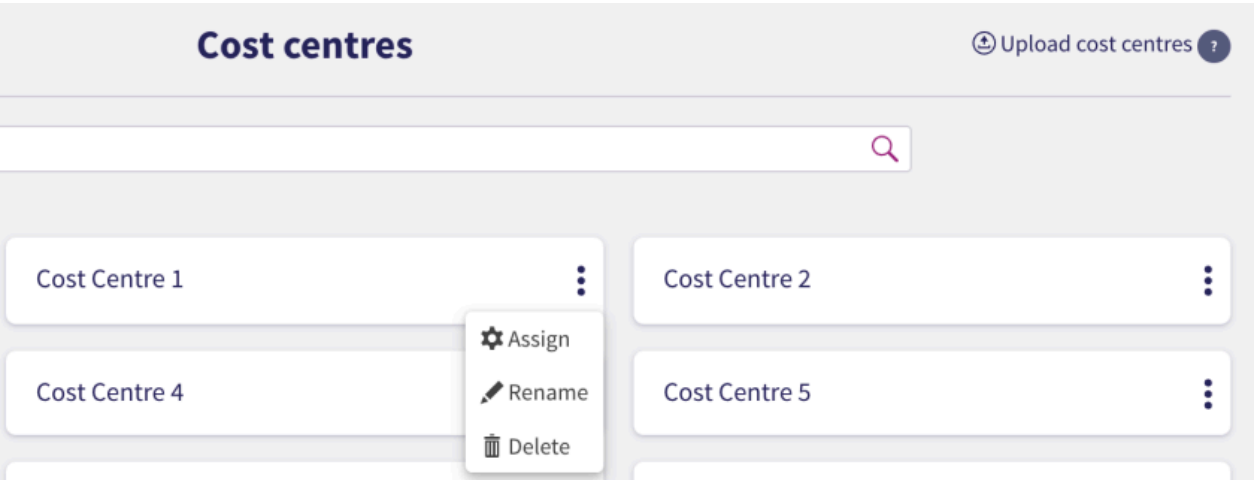
Click on 'Create new cost type'. Enter a name for your cost type and click 'Save'.



To upload multiple cost types at once, select 'Upload cost types'. This will open a window that displays saved documents on your device or computer. Now upload the document as an Excel file (.xls or .xlsx) or Text file (.txt).

How to assign, rename and delete cost centres and cost types

Go to cost centres/types, click on the three dots next to the name of the cost centre/type you wish to assign.



Select ‘Assign’ and then add or delete the relevant user.

To rename the cost centre/type, click on the three dots next to the name of the cost centre/type you want to rename.

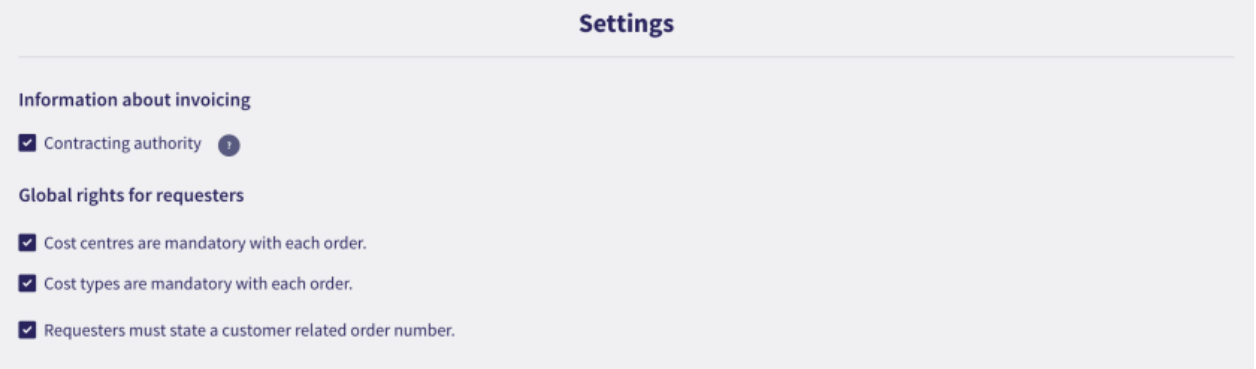
Select ‘Rename’, enter a new name and click ‘Save’.

To delete a cost centre/type, click on the three dots next to the name of the cost centre/type you want to remove. Click on ‘Delete’.

How to make cost centre and cost types mandatory with orders

Go to ‘Organisation’ and click on ‘Procurement settings’.

Here you can select if you want cost centres and cost types to be mandatory with each order. Click ‘Save’ when you’ve made your selection.



How to assign cost centres and cost types to ordered items

When completing the purchasing process, select the relevant cost centre and cost type to the items on the checkout page.

You can also add a new cost centre and cost type directly from this page. Click on ‘Create new cost centre’ next to the cost centre or ‘Create new cost type’ next to the cost type, enter the name of the new cost centre/type and click ‘Save’.

