Creating Departments

Departments are categories that you can create to separate and track records such as financials, transactions, and employees. For example, you can create a department for each team of employees dedicated to a certain area of business, and then track income and expenses by each department over any time period.

To enable Departments, go to Setup > Company > Setup Tasks > Enable Features. On the Company subtab, check the Departments box and then click Save.

To create a department record:

1. Go to Setup > Company > Classifications > Departments > New.
2. Enter up to 60 alphanumeric characters for the name of the department.
3. If this department is a subdepartment of another, in the **Subdepartment of** field, select the parent department.
4. If you use NetSuite OneWorld, in the **Subsidiary** field, select one or multiple subsidiaries.

   To select multiple subsidiaries, hold down Ctrl and click each subsidiary.

   A subsidiary must be associated with a department for the department to be selected on a transaction or record related to that subsidiary.
5. If you use NetSuite OneWorld, check the **Include Children** box to associate the department with all the child subsidiaries of each subsidiary selected in the **Subsidiary** field.
6. Check the **Department is Inactive** box to inactivate this department record.

   Inactive departments do not appear in lists of departments on records and transactions.

   > **Note:** To inactivate departments from the Departments list at Setup > Company > Classifications > Departments, check the **Show Inactives** box, check one or more boxes in the **Inactive** column, and then click **Submit**.
7. Click **Save**.

You can restrict access to transaction, employee, partner, and optionally item records based on their assigned department values. You can also limit the departments that users can assign to these records. Department restrictions can be defined per user role and then applied to all users logged in with that role. For more information, see Restricting Access to Records by Department.

You also can apply department restrictions to custom records, if the custom record type includes a Department field. You can add this field directly from the Department record by clicking the New Field button. For more information, see Applying Role-Based Restrictions to Custom Records.

Related Topics