Branches

September 10, 2026

Branches

Branches

A branch is a company location record maintained from the **Branches** configuration list.
Use this page to find a branch, review its information, and continue to the page for creating or editing it.

If you need to…	Go to
Find a branch or review the list headers	Find and open a branch
Review the information on a branch form	Understand the branch information
Enter branch information or add contacts	Enter and save branch information
Work with a saved branch's additional tabs	Handle new and existing branch variations
Create a branch	New branch
Edit a saved branch	Edit branch
Maintain a branch logo	Edit branch logo
Maintain company currency choices	Company currencies

Before you start

The Branches list and form are available when the Branches subscription is included for your company. Your permissions and whether the branch is new or already saved determine which actions you can use.

Prerequisites

Before you begin	Why it matters
Have access to the Branches configuration feature.	Without the feature, the subscription-upgrade surface appears instead of the list or form.
Have permission to create or edit branches.	**New**, **Save**, and **Save and Close** are permission-dependent.
Know whether you are creating a branch or changing a saved branch.	**Default** and **Last Modifications** appear only for a saved branch.
Have the branch's company, financial, address, and contact information ready.	These are the information groups the form presents.

The form checks its required fields before saving. **Display Name** and both parts of **Financial Year Start** are required only where your company configures them; **Reference Currency** and **Local currency** have required rules.

Find and open a branch

The Branches list is the place to select a branch record or start a new one. Its headers come from the list layout available to your company, so use the headers visible in your list.

Prerequisites

- You have reached the company configuration area.
- Your account has the permission required for the action you want to use.

Steps

1. Open **Branches** from the company configuration menu.
2. Read the headers **Branch Name**, **Country**, and **Mail** when they are displayed.
3. Use the list buttons at the top of the grid as needed:

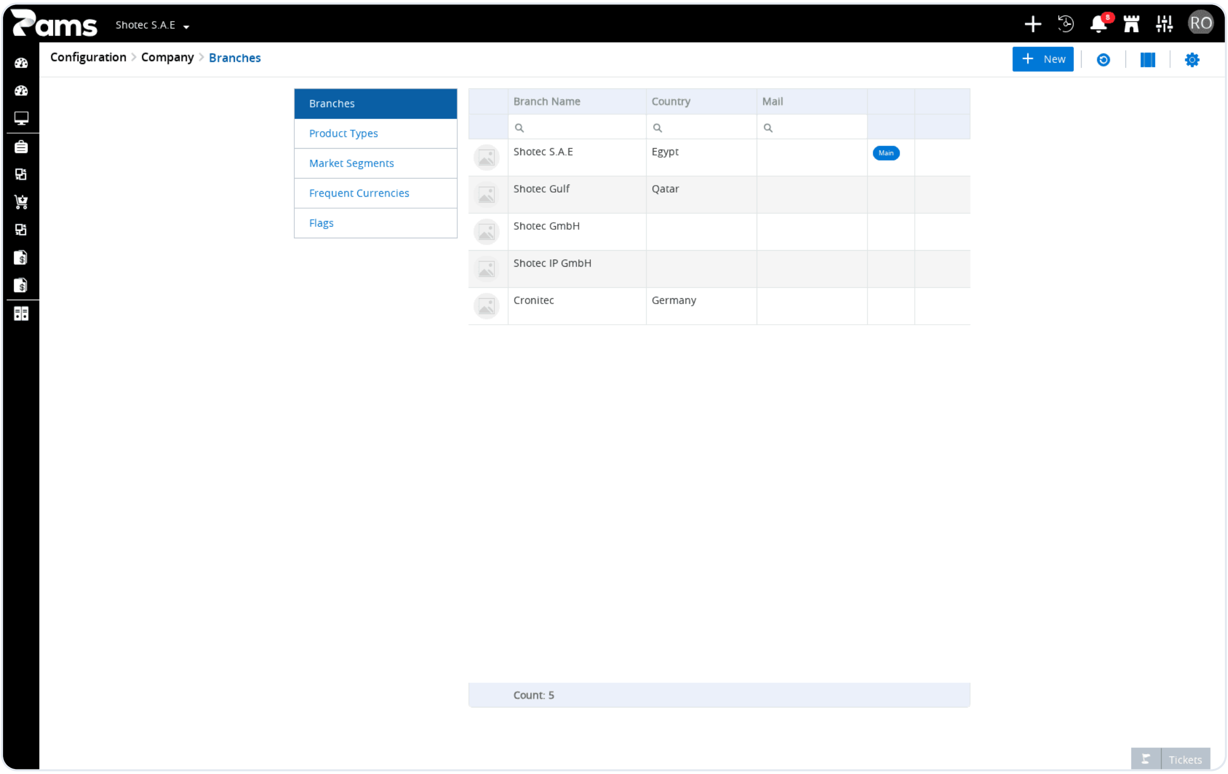
If you need to…	Select
Refresh the list	**Refresh**
Change the list layout	**Table Layout**
Open list settings	**Settings**

4. Choose one action:

If you need to…	Select
Create a branch	**New**
Open a saved branch	Select the branch row.

The list contained five records and displayed `Count: 5` when it was opened. Selecting a branch row
opens that branch's form.

> **Important:** The list layout available to your company determines which headers you see. Use
> the visible headers when locating a branch.



Result: You are on the Branches list, the new-branch form, or the saved branch form you chose.

List tools and branch actions

The list can also provide search, filter, layout, import, and export tools. The available branch
columns are configured for your company; the active list can include a logo image column, a
main-branch indicator, and a row route for editing the branch logo.

Use **Export** to open the export dialog. The dialog provides **Cancel** and **Export**. If the list
has no data, the message `NO Data to Export` appears.

The **New** action opens the new-branch form when the new-branch permission and subscription count
allow it. At the branch-count limit, **New** invokes the upgrade check instead of opening the form.

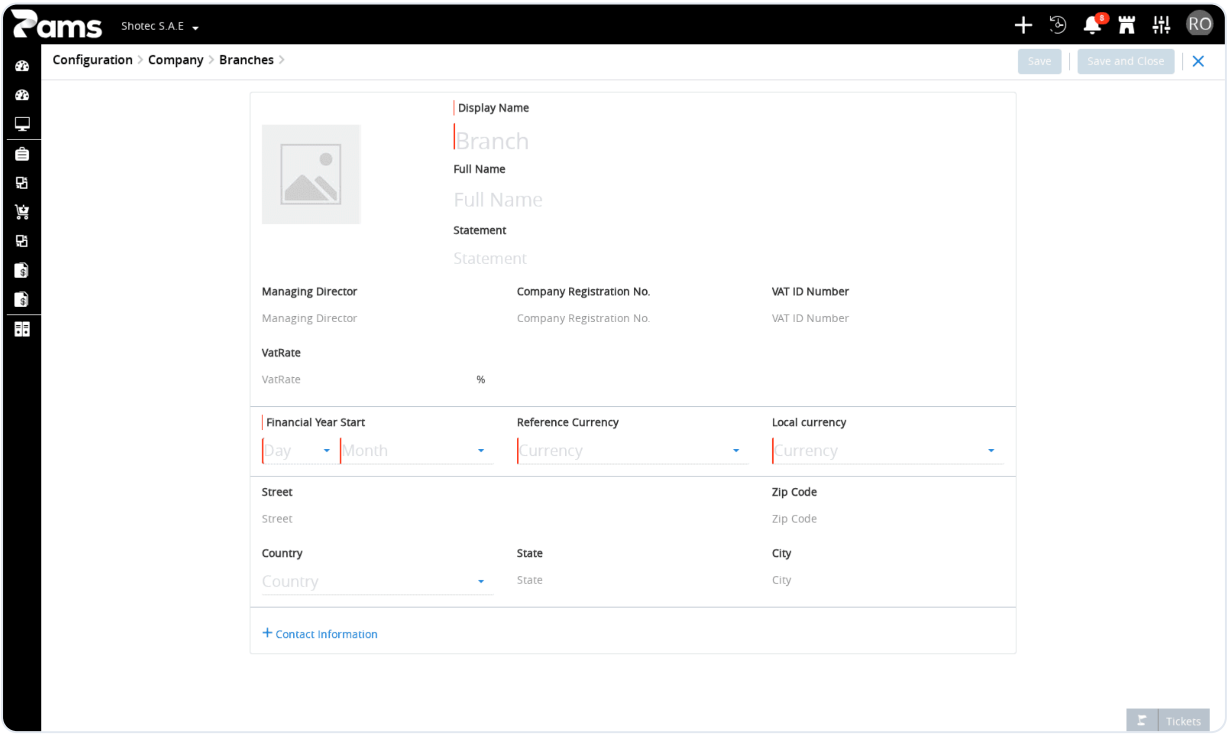
When a non-main branch is selected for the main-branch action, the confirmation asks `Are you sure you want to make this Main branch?`. Select **Cancel** to leave it unchanged, or select **Yes** to
make it the main branch. The list then returns `Data Saved Successfully`.

Understand the branch information

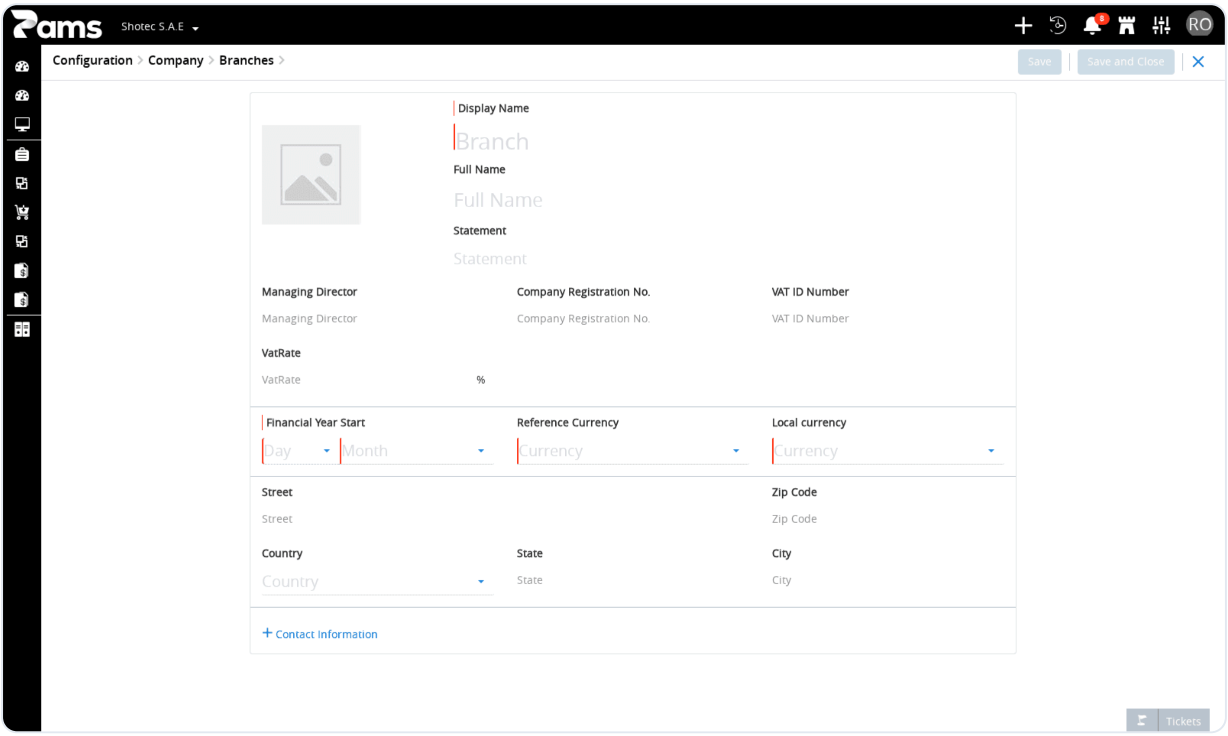
The branch form groups the information used to identify a company location, set its financial
values, record its address, and add contact values.

Information group	Fields	Type and rule
Company	**Display Name**, **Full Name**, **Statement**, **Managing Director**, **Company Registration No.**, **VAT ID Number**	Text fields. **Display Name** is required only where your company configures it.
Financial	**VatRate**	Number from `0` through `100`.
Financial	**Financial Year Start**	Day and month selectors. Each carries a configurable required rule.
Financial	**Reference Currency**	Select field with a required rule. It is disabled when the branch has jobs.
Financial	**Local currency**	Select field with a required rule.
Address	**Street**, **Zip Code**, **Country**, **State**, **City**	Text, number, select, text, and text fields. The address group appears when an address exists.
Contacts	Contact value	A text field appears after you add a contact type. Phone, fax, and mobile values accept up to 20 characters and apply numeric-key filtering.

The form displayed the fields listed above, along with **Save** and **Save and Close**.



The form shows **Reference Currency** and **Local currency** as choice fields. A contact value is
the detail associated with a contact type, such as a phone number or email address.



Enter and save branch information

Create or change a branch by entering the values below.

Prerequisites

- The Branches feature is included for your company.
- You have create permission for a new branch or edit permission for a saved branch.
- You have the branch information ready.

Steps

1. Enter the branch name in **Display Name**.
2. Enter the value in **Full Name** as needed.
3. Enter the value in **Statement** as needed.
4. Enter the value in **Managing Director** as needed.
5. Enter the value in **Company Registration No.** as needed.
6. Enter the value in **VAT ID Number** as needed.
7. Enter a percentage from `0` through `100` in **VatRate** when a VAT rate applies.
8. Select a day in the **Financial Year Start** day field.
9. Select a month in the **Financial Year Start** month field.
10. Select a value in **Reference Currency**.
11. Select a value in **Local currency**.
12. Enter the address in **Street** as needed.
13. Enter the postal number in **Zip Code** as needed.
14. Select a value in **Country** as needed.
15. Enter the value in **State** as needed.
16. Enter the value in **City** as needed.
17. Select **Contact Information**.
18. Select one contact type from the menu:

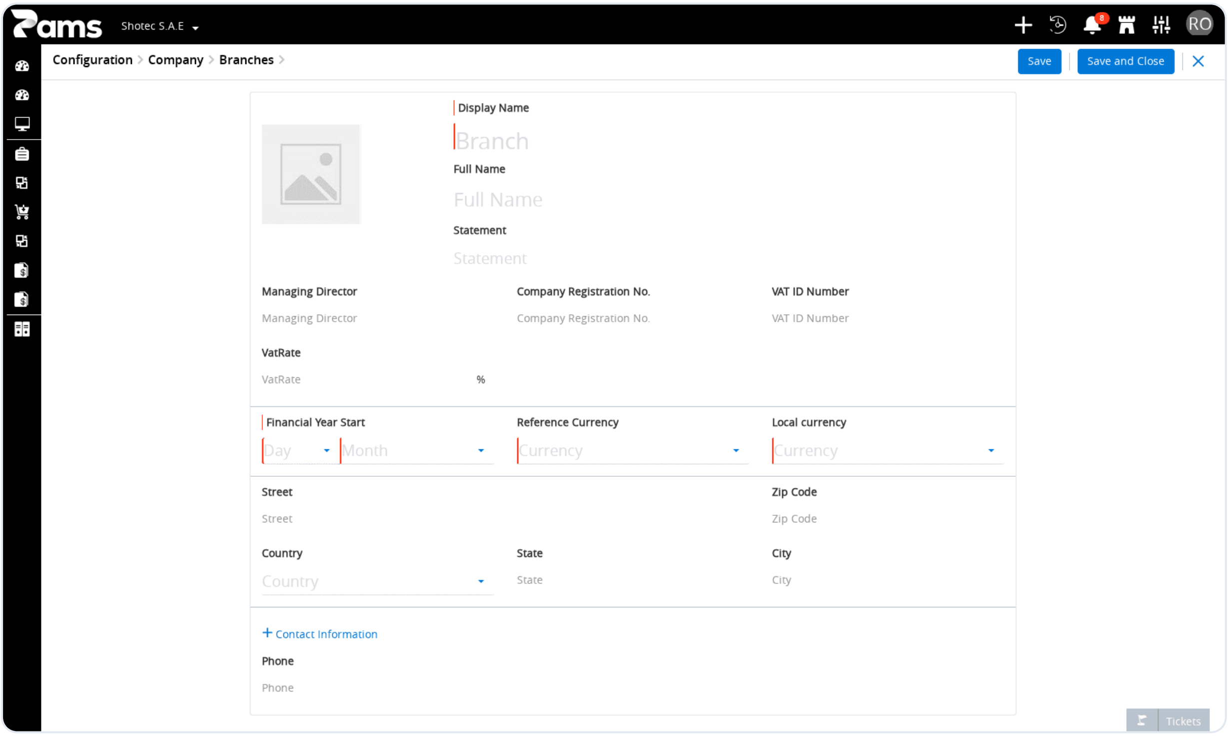
If you need to add…	Select
A telephone number	**Phone**
A fax number	**Fax**
A mobile number	**Mobile**
An email address	**Email**
A website	**Website**

If you need to add…	Select
Online support details	**Online Support**

19. Enter the contact detail in the new contact field.
20. Choose one save option:

If you need to…	Select
Save and continue working on the branch	**Save**
Save and leave the form	**Save and Close**

The form checks the required entries before saving. A successful save displays `Branch saved Successfully`. A new branch opens its saved branch form after **Save**; **Save and Close** leaves the
form.



Result: The branch information is submitted through the selected save option, or the form
remains open for further work after **Save**.

Handle new and existing branch variations

A new branch carries the main information form. A saved branch adds the **Default** and **Last**

Modifications tabs for branch-specific settings and history.

Prerequisites

- You have opened a saved branch record.
- You have edit permission for changes that require saving.

Steps

1. Select **Default** to open the default-margin settings.
2. Choose the applicable margin type from the available margin choices.
3. Enter the fixed default margin when the fixed-margin choice displays its number field.
4. Complete the degressive margin list when a degressive margin choice displays it.
5. Select **Save** in the Default area to save the margin values.
6. Select **Last Modifications** to open the branch's log-history surface.

The Default settings change with the margin choice:

If the branch uses…	The form provides…
A fixed margin	A fixed-margin number field.
A decreasing absolute margin	A degressive-margin list.
A decreasing accumulative margin	A degressive-margin list.

The **Default** and **Last Modifications** tabs appear when the branch has been saved. The
Reference Commission, Reference Margin, Finance currency, and Registrations surfaces are not part
of the available branch form. The row-delete action is also unavailable. **Reference Currency**
is disabled when the branch has jobs.

Result: You are viewing the saved branch's default-margin settings or its Last Modifications
history.

When validation or saving goes wrong

Use the message text on screen to choose the correction below.

Message	When it appears	What to do
`Name is required`	**Display Name** is empty when validation runs.	Enter a display name.
`Just '_' '-' And '.' Characters Accepted`	A restricted display-name pattern is not met.	Use only the accepted characters in **Display Name**.
`required`	A required financial choice has no value.	Select the missing day, month, reference currency, or local currency.
`Forbidden characters detected. Please remove them and try again.`	A list filter contains forbidden characters.	Remove the forbidden characters and apply the filter again.
`Branch saved Successfully`	Branch saving completes.	Continue working, or leave through the chosen save option.
`Logo Deleted Successfully`	Branch logo deletion completes.	Continue with the branch record.
`Please insert degressive margin list`	A degressive margin type has no degressive margin list.	Add the list before saving the Default settings.
`Data saved Successfully`	Default-margin saving completes.	Continue with the saved margin settings.
`Error while saving data`	Default-margin saving returns an error.	Review the margin values and try again.
`Branch does not exist`	The requested branch record returns no record.	Return to the **Branches** list.
`Data Saved Successfully`	Making another branch the main branch completes.	Continue from the refreshed Branches list.
`NO Data to Export`	Export is selected when there is no data to export.	Return to the list.
`Are you sure you want to make this Main branch?`	The main-branch action opens its confirmation.	Confirm only when the selected branch must become the main branch.
`Are you sure you want to delete this item?`	You are removing a branch logo.	Confirm only when the branch logo should be removed.

The form also has an unsaved-change flow when you leave with changed information. Use the close control and choose the option that matches whether you want to save the changes.

Continue from the branch record

After you identify the next branch task, continue with the page that owns it.

Next task	Page
Create a new branch	New branch
Edit the saved branch information	Edit branch
Change or remove the branch logo	Edit branch logo
Maintain the currency choices used by the form	Company currencies

From the company configuration menu, select **Branches** to open the branch list.
Select **New**
to open the new-branch form, or select a saved branch row to open that branch's form.

After returning to the list for `NO Data to Export`, select **Export** when data is available. After returning to the list for `Branch does not exist`, select an available branch.

Out of scope on this page

The row-delete action is unavailable on the Branches list. The `Data Deleted Successfully` message
belongs to that unavailable action and is not a branch-list task.

Result: You know which page owns the next branch-maintenance action.