



Create Cost Center

For FI and SP

How to Create a Cost Center

Description: A Cost Center is defined as the department, or unit, in an organization, which should be charged or revenue is applied for accounting purposes.

Security Access: SuperUser or Cost Center Admin

Steps to Create:
Follow this guide step-by-step to create a DCI Cost Center

1. Select the Cost Centers Tab from the home screen

The screenshot displays the DCI software interface. At the top, there is a navigation bar with tabs for HOME, PAYROLL, BILLING, SCHEDULING, AUTHORIZATION, SETTINGS, REPORTS, and IMPORT. A user profile for 'matthew.cavallo' is visible in the top right corner. On the left side, a vertical navigation menu lists various options: DASHBOARD, ENTRIES, ACCOUNTS, PROFILE CERTIFICATION, SCHEDULES, AVAILABILITY, CLIENTS, EMPLOYEES, RESIDENTIAL PROGRAMS, DAY PROGRAMS, CASE WORKERS, GROUP SERVICES, PARENTING PROGRAMS, GUARDIANS, COST CENTERS (highlighted with a red box and a '1' in a red circle), and PENDING ENTRIES (13). The main content area shows the 'Home > Dashboard' view for 'Matthew Cavallo' for the period '11/03/2019 - 11/09/2019'. It includes an 'Overtime Gauge' showing 'No entry in current week' and a 'Total Hours' summary table:

Total Hours 11/03/2019 to 11/09/2019	
Approved Hours:	0.00
Pending Hours:	0.00
Unverified Hours:	0.00
Total Hours:	0.00

Below the summary, there are sections for 'Authorizations' and 'Expiring Certifications'. The 'Expiring Certifications' section has a table with columns for 'Certification Name', 'Certification Expiration Date', and 'Link to Certification Course'.

Add New Cost Center

Once the Cost Center Tab has been opened:

1. Select Actions
2. Select New Cost Center

Note:

Existing Cost Centers display below. To open an existing Cost Center, simply select the Cost Center Name.

Home > Cost Centers

Cost Centers

Type Cost Center Name Type Cost Center Code Select State

Select Status

Reset

Export

Showing 9 out of 9 records

Name	Cost Center Code	State	Cost Center Reference	Cost Center Reference2	Status
Default Cost Center	00-000	CA			Active
Galactic Federation	GLTCF	ID			Active
Infernum	INF	ID	INF		Active
KJ Cost Center	KJCC	ID			Active
La Banque	LAB	ID			Active
QualityLogic1	QualityLogic1	ID			Active
QualityLogic2	QualityLogic2	ID			Active
Raccoon City	RCTY	ID			Active
Teri Cost Center	Teri Cost Center	AZ			Active

Enter New Cost Center

Enter the following Required Fields*:

1. Name
2. Cost Center Code
3. State
4. Status
5. Select Save to add new Cost Center

Note:

Cost Center Reference and Certification Template are optional fields

**Naming convention details for each field is on the next page.*

The screenshot shows a web form titled "Add New Cost Center" with a close button (X) in the top right corner. The form contains several input fields, each with a numbered callout:

- 1. Name: Text input field containing "Test Cost Center East".
- 2. Cost Center Code: Text input field containing "TCCE".
- 3. Select State: Dropdown menu showing "AZ".
- Cost Center Reference: Text input field containing "Cost Center Reference".
- Certification Template: Dropdown menu showing "Select Certification Template".
- 4. Status: Dropdown menu showing "Active".

At the bottom right of the form, there are two buttons: "Cancel" and "Save". The "Save" button is highlighted with a yellow circle and the number 5.

Cost Center Naming Details

- **Name:** The Cost Center name should be a name that is recognizable by most users of an organization
- **Cost Center Code:** This should be the accounting code
 - Tip: If using this for accounting purposes, we recommend entering the Name in this field again for simplicity.
- **Select State:** This should be the state where the Cost Center is located
- **Cost Center Reference:** This is an optional text field to provide more detail about the Cost Center and could be used to differentiate multiple cost centers with similar naming conventions
- **Certification Template:** Select if there are a certification requirements specific to a specific Cost Center
- **Status:** The default is active, switch to inactive only when a cost center is no longer valid

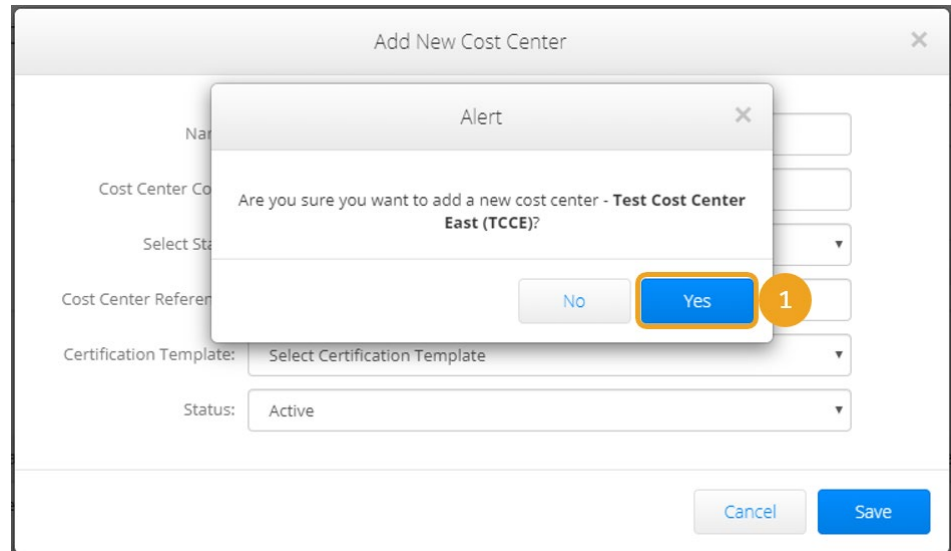
Confirm New Cost Center

1. Select Yes to confirm the new Cost Center entry.

Note:

- *Once this is completed, DCI opens to the new Cost Center tab.*
- *Once added to DCI, Call Centers cannot be deleted.*
- *Inactivate the Call Center when no longer in use.*

To add multiple cost centers, repeat the previous steps.



Cost Center Details

- 1. Cost Center Details:** Displays the information created on the Add New Cost Center Form
- 2. Actions:** Provides the ability to edit cost center details, add notes and attachments
- 3. Cost Center Tabs:** Select each tab to display the data below

The screenshot displays the 'Cost Center Details' page for 'Test Cost Center East'. The page includes a sidebar with navigation options such as DASHBOARD, ENTRIES, ACCOUNTS, and COST CENTERS. The main content area shows the 'Cost Center Details' form with the following information:

- Cost Center Name: Test Cost Center East
- Cost Center Code: TCCE
- State: AZ
- Cost Center Reference:
- Certification Template:
- Status: Active

The 'Actions' menu is visible, providing options like New Note, New Attachment, Edit Cost Center, and Edit Custom Field Values. The 'Profiles' section is also visible, featuring search filters for Type Profile Name, Select Type, and Select Status, along with a Search button. The page indicates 'No records to display' for the Profiles section.

Thank you!