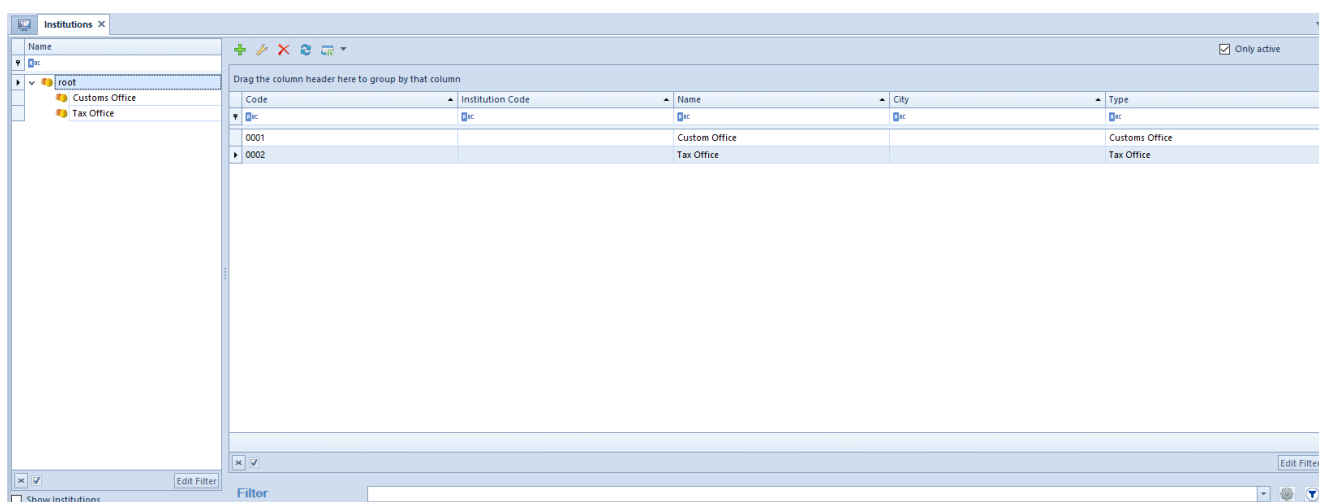


# List of institutions

The list of institutions contains information about institutions defined in the system which are sometimes necessary when:

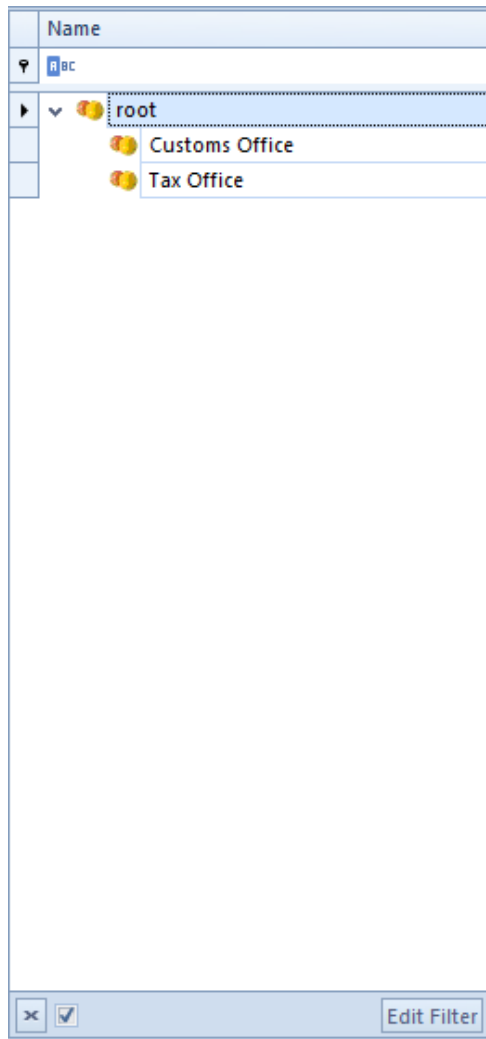
- making payments
- making <<cash/bank transactions>>
- filling-in <<VAT tax-return declaration>>

To open the list of institutions, it is necessary to go to the *Main* menu and then, from *Directories* list of buttons, select [**Institutions**] button.



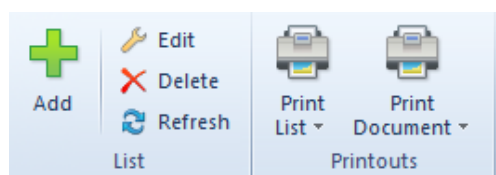
## List of institutions

In the left panel, there is a tree of institution groups to which defined institutions can be assigned. The following types are defined in the system by default: *Customs Office* and *Tax Office*. The user can define his/her own institution groups, from the level of <<generic directory>> *General* → *Institution Types*.



Institution groups tree

The menu of the list of pickup points contains <<Standard buttons>> allowing for adding/modifying/deleting of institutions and buttons relating to printouts.



Menu of the list of institutions

The list is composed of the following columns:

- Code – institution code defined by the user
- Institution Code – institution id number assigned by authorities

- Name
  - City
  - Type – value retrieved from the *Types of Institutions* generic directory
- 

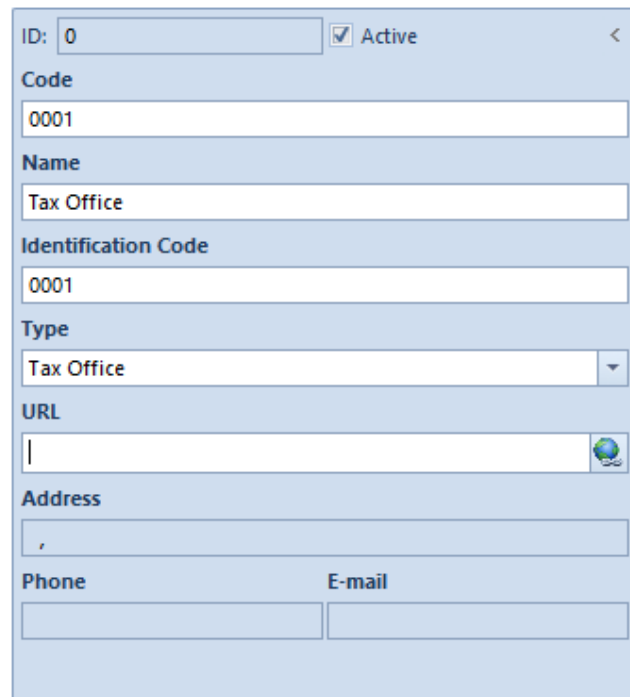
## Defining institution

A new institution can be added by clicking on [Add] button placed in the main menu or ergonomic panel above the [list of institutions](#). The button opens a new institution form.

On the left side of the form, there is institution form header containing the following fields and parameters:

- **ID** – institution identification number in the database, non-editable field, filled-in automatically by the system
- **Active** – if the parameter is checked, an institution can be used in the system
- **Code** – mandatory field, contains code used for a fast and easy identification of an institution (e.g., name abbreviation), can be composed of 50 characters maximum (letters and/or digits). Codes of institutions must be unique.
- **Name** – mandatory field, can be composed of 500 characters maximum (letters and/or digits).
- **Identification Code** – institution id number assigned by authorities
- **Category** – drop down list containing values defined in *General → Institution Types generic*
- **URL** – institution's website
- Fields *Address, Phone, E-mail* are completed automatically on the basis of the data entered in the

fields of *Address* tab, available on the form of institution definition.



The image shows a screenshot of a web form for defining an institution. The form is titled "Institution form header" and contains the following fields:

- ID:** 0
- Active:**
- Code:** 0001
- Name:** Tax Office
- Identification Code:** 0001
- Type:** Tax Office (dropdown menu)
- URL:** (empty text field)
- Address:** (empty text field)
- Phone:** (empty text field)
- E-mail:** (empty text field)

Institution form header

Moreover, the institution form is divided into the following tabs: *Address*, *Bank Accounts*, *Accounting*, *Attributes*, *Attachments*.

The tab *Address* allows for entering address and contact information (e.g., phone number or e-mail address) of an institution.

Address		Bank Accounts	Accounting	Attributes	Attachments
<b>Country</b>	<b>State</b>	<b>Contacts</b> <b>Description</b>			
United States of America		+   -   ↻			
<b>Street</b>		<b>Type</b>	<b>Number</b>	<b>Default</b>	<b>Active</b>
		☿	=	<input type="checkbox"/>	<input type="checkbox"/>
<b>Street No.</b>	<b>Apt/Unit Number</b>	<b>Notes</b>	<b>Archiving D...</b>		
<b>City</b>					
<b>Zip Code</b>	<b>Post Office</b>				
<b>District</b>	<b>County</b>				
<b>Latitude</b>	<b>Longitude</b>				
0°00'00"S	0°00'00"W				
×   ✓   Edit Filter					
<b>Description</b>					

## Tab Address

The tab *Bank Accounts* presents a list of bank accounts assigned to an institution and allows for adding/editing/deleting them.

The tab *Accounting* presents default bookkeeping accounts assigned to a given institution.

Detailed description of the tabs *Attributes* and *Attachments* can be found in article <<Tab Discount Codes, Analytical Description, Attributes, Attachments and Change History>>.