

Set Up and Manage Organizations

Organizations are groups that must schedule facilities. Examples include adult confirmation, American Legion, the women's circle, prayer groups, the finance committee, and so on.

After you set up an organization in Facility Scheduler, you can schedule resources to use throughout the year for that organization.

Individuals are people who want to schedule facilities or those you want to make appointments with. Examples of individuals include Father Brown, Maintenance, and so on.

Adding an Organization or Individual

1. On the Information tab, click **Organizations & Individuals**.
2. At the top, click **Add Org**.
3. Enter the organization or individual's name.
4. Enter an abbreviation of the organization/individual's name.
5. In the Priority field, enter a number that indicates the organization/individual's priority if a conflict occurs when scheduling.

Useful Information

The highest priority is **1**, and the lowest priority is **9**. If a conflict occurs when scheduling, select the organization that has higher priority.

6. In the Remarks text box, enter information about the organization/individual, if necessary.
7. At the bottom of the window, enter the contact information for this organization/individual.
8. Click **Save**.

Useful Information

You can also add new organizations during any scheduling process.

Adding Charges and Payments

1. On the Information tab, click **Organizations & Individuals**.
2. Locate the organization record you want.
3. In the navigation pane, click **Charges & Payments**.
4. Complete the information fields, and enter the charge and payment details in the grid.
5. Click **Save**.

Related Topics

- [View an Organization's Events and Schedules](#)
- [View an Organization's Total Charges, Payments, and Balance](#)
- [Combine Duplicate Organizations](#)
- [Delete an Organization](#)

- [Delete an Organization's Scheduling History](#)
- [Post Multiple Payments](#)

[Add Contacts for an Organization, Event Package, or Facility](#)