

# Configuration

## Partner Category Maintenance

### Where Partner Category Maintenance is Located

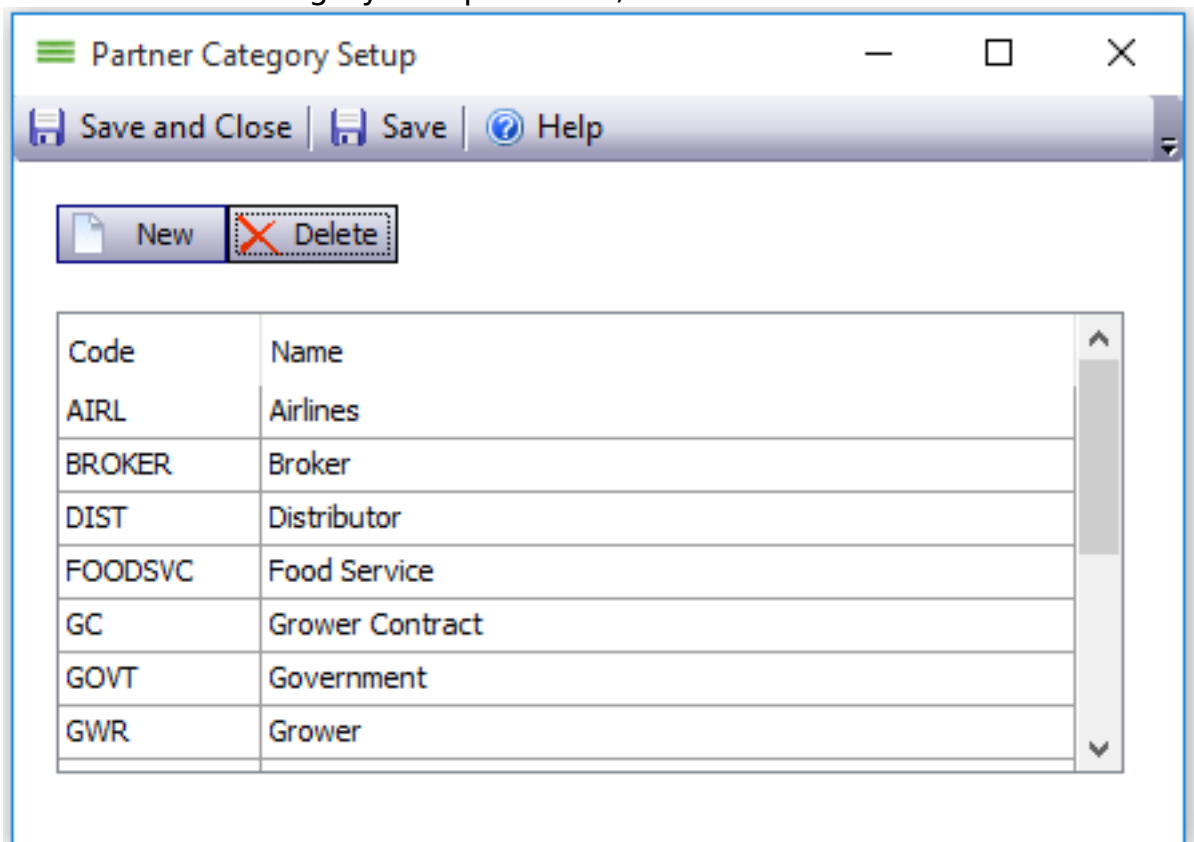
- Configuration > Partner Category Maintenance

### About Partner Category Maintenance

Use the function to create custom categories to apply to Trading Partners. For example, use Partner Categories when you want to create groups that are affected by different charges or that must be grouped or split out for reporting.

### How to Make Partner Categories

1. Configuration > Partner Category Maintenance
2. In the Partner Category Setup window, click **New**.



Code	Name
AIRL	Airlines
BROKER	Broker
DIST	Distributor
FOODSVC	Food Service
GC	Grower Contract
GOVT	Government
GWR	Grower

3. Type in a code and name for the partner category. You may name them whatever you choose. (The names may appear on reports. Be specific and descriptive.)
4. When you have entered all desired Partner Categories, **Save and Close** to save your work.

### How to Assign a Partner Category to a Trading Partner

# Configuration

Blue Yonder Airlines - BLUEYOND00

Save and Close Save and New Save Help

General Contacts Addresses Receiver Memo

**Attributes**

Name: Blue Yonder Airlines

Account Code: BLUEYOND00 Customer Acctng ID: [dropdown]

Short Name: Blue Yonder Payable Acctng ID: [dropdown]

Phone: (316)555-0161 Federal ID/SSN: [text]

Is Active: ☒ Fax: (316)555-0160

Bin Owner: ☐

**Relationships**

Customer: ☐ Supplier: ☐

Association: ☐ Broker: ☐

Freight Broker: ☐ Transporter: ☐

Receiver: ☒ EDI: ☐

**Category**

☒ Airlines

☐ Broker

☐ Distributor

☐ Food Service

☐ Government

☐ Grower

2. Double click the customer name; the customer information will open.
3. Click the checkbox to select a **Category**.
4. To add a new category, click the plus sign. Then click the checkbox to select the **Category**.
5. **Save and Close** to save your work.

Unique solution ID: #1018  
Author: EnvioAg-Admin  
Last update: 2017-06-01 22:16

1. Company > Find > Trading Partners