Configuration

Partner Category Maintenance

Where Partner Category Maintenance is Located
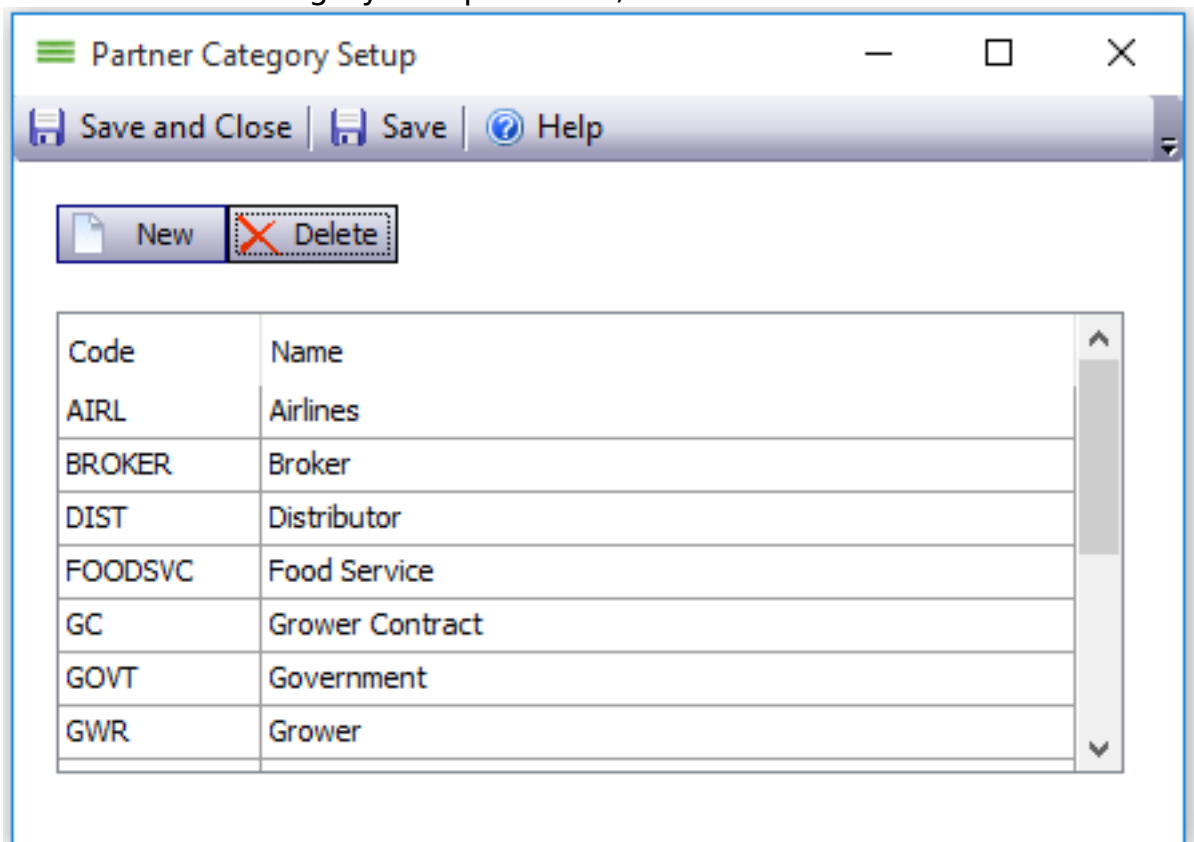
- **Configuration > Partner Category Maintenane**

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.**

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 spefcific 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

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.

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Author: EnvioAg-Admin
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1. Company > Find > Trading Partners