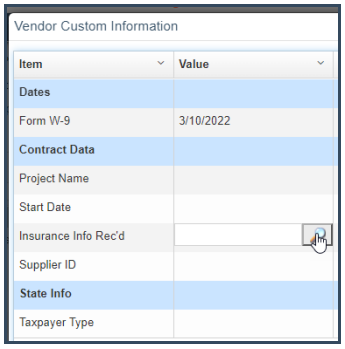
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Item Categories

Settings > Categories

The option exists to add custom fields to various maintenance screens, such as Vendors, Customers, Accounts, Objects, etc. Any custom information fields can be edited and viewed on the (vendor, customer, account, and object) maintenance screen and included in a custom report. Click on the **Custom Info button** on any of those screens.

Here's an example of a vendor screen.



Set up for Custom Information

Custom Information fields are added under the Settings menu. Once set up here, the custom fields are available on any vendor/customer, account, or object maintenance screen. Select the view type. View Type Vendors applies to both AP vendors and AR customers. For object tracking, view types are specified by the object type.

Category: This allows various rows to be grouped under a category header (shown in blue above). Categories will be displayed in the order shown, but can be repositioned simply by clicking the category to be moved and using the up/down buttons.

- **Items:** Click to highlight a category and click Items to see the various custom fields within the selected category. (These would be the white rows in the example above.)

- **Data Codes:** The option to add a defined selection of choices to this Item. Note in the Insurance Info Rec'd row above; a search icon exists where a data code can be selected (Yes or No in this case).

Deleting a Category

If you wish to delete a category, you cannot delete a category that still has items in it. To delete a category, delete all the items within it first, then delete the category.