



# Vendor Categories

2017- Fall Edition

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## Overview

The **Office System** allows users to group their Vendors by **Category**. By selecting a **Vendor Category**, this provides users a greater level of detail for reports. This information can be very helpful for future reference, especially if the user has a particular **Category of Vendors** they use for certain expenses.

For example, Titleist is a vendor most Clubs use strictly for the Pro Shop. By creating a **Category** called Golf, the user can filter a report that only shows Vendors and costs associated with the Golf/Pro Shop. If the user has a large number of Vendors and wants to pull reports on just a certain aspect of their business, creating a Category will allow for reports to be pulled rapidly.

**Please Note:** **Vendor Categories** are a required field when creating new Vendors. With this said, it is important to keep Vendor Categories clean and easy to track.

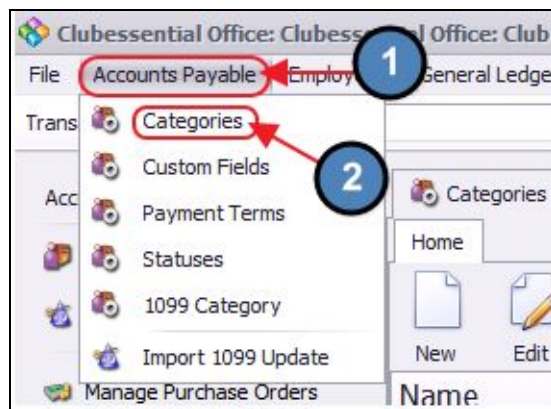
## Use Case(s)

- A Club creates a Vendor Category to group their Pro Shop Vendors.
- A Club creates a Vendor Category to group their Beverage Vendors.
- A Club creates a Vendor Category to group their Catering Vendors.

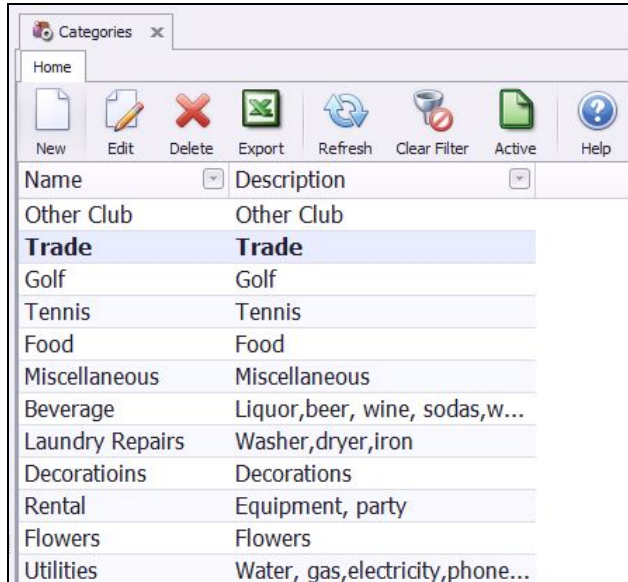
## Accessing the Tool

To access **Vendor Categories**:

- 1) Select **Accounts Payable** across the **top** toolbar and select, **Categories**.

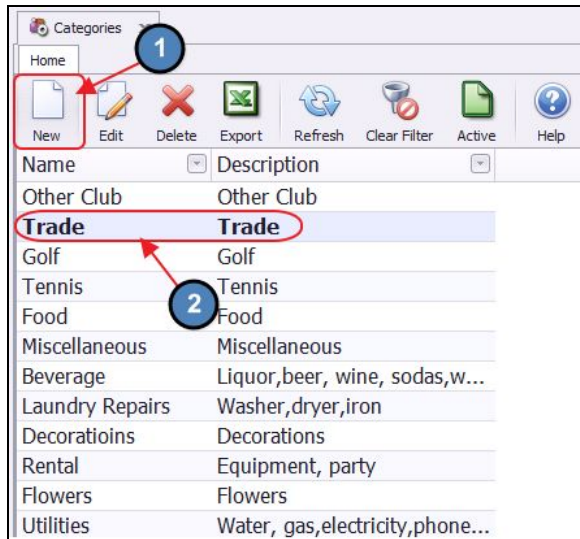


2) The **Vendor Categories Grid** will launch.



Name	Description
Other Club	Other Club
<b>Trade</b>	<b>Trade</b>
Golf	Golf
Tennis	Tennis
Food	Food
Miscellaneous	Miscellaneous
Beverage	Liquor,beer, wine, sodas,w...
Laundry Repairs	Washer,dryer,iron
Decoratioins	Decorations
Rental	Equipment, party
Flowers	Flowers
Utilities	Water, gas,electricity,phone...

3) The primary functions associated with managing **Vendor Categories** are embedded in the Vendor Category setup screen, which can be accessed by double-clicking on an existing Category, or clicking the **New** button.



Name	Description
Other Club	Other Club
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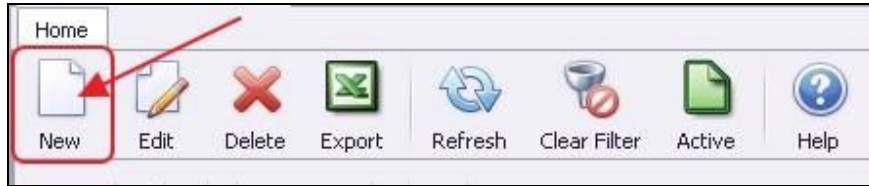
## Creating a New Vendor Category

To create a new **Vendor Category**:

1) Navigate to the **Vendor Categories Grid** and perform either of the following to launch the Vendor Category setup screen:

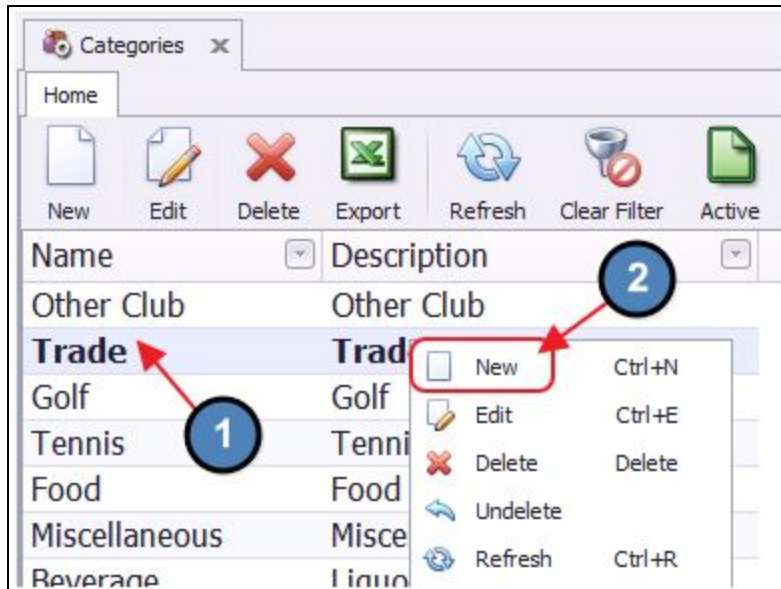
*Option 1*

Click the **New** icon on the toolbar.



*Option 2*

Right-click anywhere on the Vendor Categories Grid and select **New**.



2) The **Vendor Category setup** screen will launch.



- 3) Enter a **Name** and **Description** for the Vendor Category. Once complete select **Save & Close**.



## Best Practices

1. Vendor Categories are a required field when creating a new Vendor, keeping detailed notes on Vendors will be helpful when it comes time to run reports based on the various categories.
2. Make sure all Vendor categories are clearly and distinctly labeled to create ideal organization.

## FAQs

**Q: What reports are most useful when wanting to view expenses or purchases by Vendor Categories?**

**A: Vendor Aged Open Invoice** is a report that can provide open invoices by Vendor Category. The data genie would be the best tool to use to build a customized report to view purchases by Vendor category and it is very simple to build.

**Q: What is the best way to see all Vendor Categories I currently have?**

**A: The Vendor Categories grid** will display all current Vendor Categories. If you would like to see all vendors within a certain Vendor Category, you can use the **Manage**



**Vendors** Grid and filter by **Vendor Category**. Once the grid is filtered users can export the grid to excel.