



## Vendor Categories - FIN2750



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# Vendor Categories - FIN2750

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This page is used to establish a list of vendor category codes to be used by the local education agency (LEA). You can use the category codes to group and sort vendors in a manner that meets your LEA's needs. The Maintenance > Vendor Information > Vendor Miscellaneous tab allows you to assign category codes to specific vendors.

### Retrieve a vendor category:

Field	Description
<b>Starting Category Code</b>	Type the beginning category code from which you want to retrieve. Click <b>Retrieve</b> . A list of category codes equal to and greater than the entered starting category code is displayed.

### Add a category code:








Click **+Add** to add a row.

Field	Description
<b>Category Code</b>	Type a three-digit user-defined category code.
<b>Description</b>	Type a user-defined category code description. The field can be a maximum of 30 alphanumeric characters.
<b>Bid Category</b>	Select to identify the category code as an active bid category.
<b>Begin Date</b>	Type the beginning effective date for the bid. The field is optional.
<b>End Date</b>	Type the ending effective date for the bid. The field is optional.
<b>HUB</b>	Select to identify the category as a Historically Underutilized Business (e.g., minority, women, etc.). If selected, the category code is available for use in the <b>HUB Code</b> field on the Maintenance > Vendor Information > Vendor Miscellaneous tab.

Click **Save**.

### Other functions and features:

<b>Retrieve</b>	<a href="#">Retrieve data.</a> The <b>Retrieve</b> button is also used to retrieve information from the last save. If you click <b>Retrieve</b> , any unsaved changes are lost.
<b>+Add</b>	<a href="#">Add a row.</a> Click to add a row to the grid or press ALT+1. <b>Note:</b> When using ALT+1 to add a new row to the grid, you must use the 1 key on the keyboard, not the 1 key on the numeric keypad.

<b>Print</b>	<p><a href="#">Print data.</a></p> <p><b>Review the report using the following buttons:</b></p> <p>Click  to go to the first page of the report.</p> <p>Click  to go back one page.</p> <p>Click  to go forward one page.</p> <p>Click  to go to the last page of the report.</p> <p><b>The report can be viewed and saved in various file formats.</b></p> <p>Click  to save and print the report in PDF format.</p> <p>Click  to save and print the report in CSV format. (This option is not available for all reports.) When a report is exported to the CSV format, the report headers may not be included.</p> <p>Click <b>X</b> to close the report window. Some reports may have a <b>Close Report, Exit</b>, or <b>Cancel</b> button instead.</p>
	<p><a href="#">Delete a row.</a></p> <p>Click to delete a row. The row is shaded red to indicate that it will be deleted when the record is saved.</p> <p>You cannot delete a category code that is assigned to a vendor on the Maintenance &gt; Vendor Information &gt; Vendor Miscellaneous tab.</p> <p>Click <b>Save</b>. A message is displayed asking if you want to delete the row.</p> <p>Click <b>OK</b> to delete the row.</p> <p>Click <b>Cancel</b> to return to the Vendor Categories page.</p>