



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
Starting Category Code	Type the beginning category code from which you want to retrieve. Click Retrieve . 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
Category Code	Type a three-digit user-defined category code.
Description	Type a user-defined category code description. The field can be a maximum of 30 alphanumeric characters.
Bid Category	Select to identify the category code as an active bid category.
Begin Date	Type the beginning effective date for the bid. The field is optional.
End Date	Type the ending effective date for the bid. The field is optional.
HUB	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 HUB Code field on the Maintenance > Vendor Information > Vendor Miscellaneous tab.

☐ Click **Save**.

Other functions and features:

Retrieve	The Retrieve button is also used to retrieve information from the last save. If you click Retrieve , any unsaved changes are lost.
+Add	Click to add a row to the grid or press ALT+1. Note: 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.
Print	Click to print data. Review the report.



Click to delete a row. The row is shaded red to indicate that it will be deleted when the record is saved.

You cannot delete a category code that is assigned to a vendor on the Maintenance > Vendor Information > Vendor Miscellaneous tab.

Click **Save**. A message is displayed asking if you want to delete the row.

Click **OK** to delete the row.

Click **Cancel** to return to the Vendor Categories page.



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