22.07. Transaction categories

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Categorizing transactions allows you to group transactions together when reviewing or reporting them. Each type of transaction can have its own list of categories. For example customer invoices might have a category "normal" and "urgent". Inventory adjustements might have categories "expired", "damaged" and "stocktake"

From the Special menu, choose Categories

Transaction categories				
New	Delete	Modify	Transaction type	Customer
Code		Categories		Master category

Click on "New" button to create a new category.

Add category					
Master category	None				
Category code					
Category description					
	Cancel				

The categories can be added to customer, customer credit, supplier, supplier credit, repack, build, inventory adjustment while creating or editing transactions.

Once you have assigned categories they will show as a drop-down list when you enter a new invoice or transaction.

Transaction categories can be reported on, refer How to report by invoice category.

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