Name Categories

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You can categorise names in mSupply with 6 different categories. You can apply one or all or some of these categories to a name. Categories 2-6 are standard categories but category 1 is special - it's hierarchical and has 3 levels, level 1 is the top and level 3 is the bottom (similar to item categories).

Suppliers and customers have their own sets of categories. To view and edit them you choose *Show categories* from the *Customer* or *Supplier* menu and that brings up this window:

Customer category			
Show Catego	pry 1 level 3 \$		
New	Delete		
	Options		
AHC			
HOSP			
NAP			
NATIONAL HEA	LTH		
NMS			
PRIVATE			
PUBLIC FACILITI	ES		
RHC			
UHC			
Double-click	a category to edit details		
	Cancel OK		

Here you can add and edit categories for your suppliers or, in this case, your customers.

Show drop down list: This determines which category type is shown in the list and which type of category will be created if you click on the *New* button.

Delete button: Deletes the category you have selected in the list. You'll be asked to confirm the deletion first of course!

New button: Opens up the new category window which looks like this (Note that double clicking on a category in the list opens up this window too but it will be populated with the current settings for the category you double clicked so that you can edit them all):

⊖ ⊖ ⊖ N	ew category	
Description		
Category_user_field_1		
Category_user_field_2		
Parent Category	None	\$
	Cancel OK	

Description: This is the category name and will be seen everywhere when assigning names to categories or filtering on name categories in reports.

Category_user_field_1:

Category_user_field_2:

Parent category drop down list: This only appears if you're editing a category 1 level 2 or 3 category because they are the only ones that can have parent categories. A parent category is the category to which this category belongs. If the category you are creating is level 3 then you will be able to choose one of the level 2 categories as a parent. If you are editing a level 2 category then you'll be able to select one of the level 1 categories.

Previous: [[items:ad_hoc_items|Ad Hoc items]] Next: Suppliers: Adding and Viewing

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