Name Groups

Document #:	3261	Product:	CenterPoint®

Create name groups (or categories) that are meaningful to your business. For example, you might group customers into industry groups (consultants, manufacturers, contractors, etc.) or geographic groups (north metro, rural, central city, etc.) or type of customer (Wholesale, Retail, Referral Partner). Name groups are used in reporting and as a filter to limit the range of names in many reports.

Create a Name Group

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Assign a Name to a Group

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Create a Name Group

1. On the **Setup** menu, point to **Names**, and then click **Name Groups**.
2. Click **New** or if this new name group is similar to an existing name group, highlight the existing method and click **Copy** instead of New. A new name group will be created using the same information as the highlighted name group.
3. In the **Abbreviation** box, enter up to ten characters of optional information that you can easily identify the name group by. For example, W for Wholesale.
4. In the **Name** box, enter up to 50 characters that describe the name group.
5. In the **Type** box, select the type of name group the group applies to Names\, Customer, Vendor, Employee, or Salesperson.
6. Click **Save** to save the name group and return to the List tab, or click Close to save the name group and close the Name Groups screen.

Edit a Name Group

1. On the **Setup** menu, point to **Names**, and then click **Name Groups**
2. Select the name group you want to change, and then click **Edit**.
3. The **Name Group Information** is displayed. Edit or view the name group detail.

Note: If you change the information in the Name box, past name group information is automatically linked to the new name. For example, if you change name group Retail to Retail Partner, your reports will no longer show name group Retail and any existing information for name group Retail is now part of name group Retail Partner.

4. Click **Save** to save the name group and return to the List tab, or click Close to save the name group and close the Name Group screen.

Note: To return to the List tab without saving the communication method, click Cancel. To close the Name Groups screen without saving the name group, click in the upper-right corner.

This documentation is for informational purposes only. For specific accounting guidance, please contact your accountant.

Delete a Name Group

1. On the **Setup** menu, point to **Names**, and then click **Name Groups**.
2. Select the name group(s) you want to delete, and then click **Delete** .

Note: You cannot delete a record that is linked to other records in the system.

3. At the **"Are you sure you want the item deleted?"** message, click **Yes**.

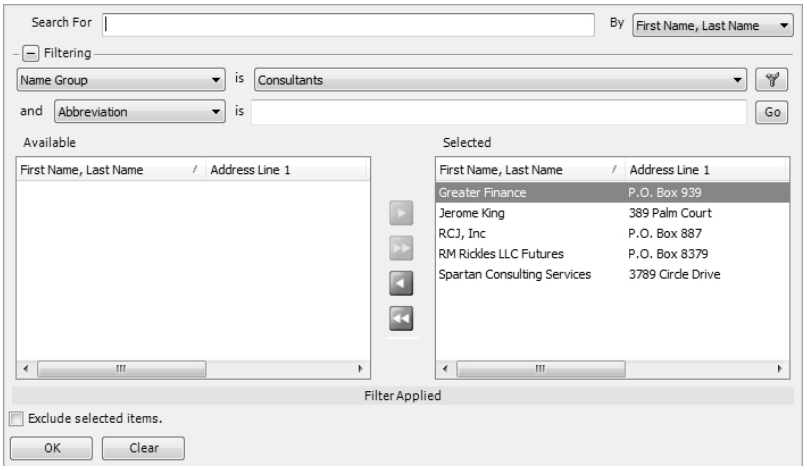
Assign a Name to a Group

1. In **Setup** > **Names** > **Names**.
2. Edit a name that belongs in a name group.
3. On the **General** tab, in the **Group** box, select the name group this name belongs to.
4. Click **Save**.
5. Repeat this process for each name you wish to assign to a name group.

Use a Name Group as Criteria on a Report

Report selections can use name groups to filter your list of names.

1. Select a report such as **Transaction Reports** > **Purchases & Accounts Payable** > **Purchases by Vendor**.
2. Under **Report Selections**, select **Vendor**.
3. Under **Filtering**, select **Name Group**. Select a name group. The list of names are filtered to the names assigned to the selected group.
4. Move all names in the **Available** column to the **Selected** column with the double right arrows.
5. Click **OK**.



6. Click **Preview**. The report inclues data assigned to the filtered names.
7. The report can be saved as a favorite. Favorite reports retain filter selections as well as column and group/sort modifications.

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