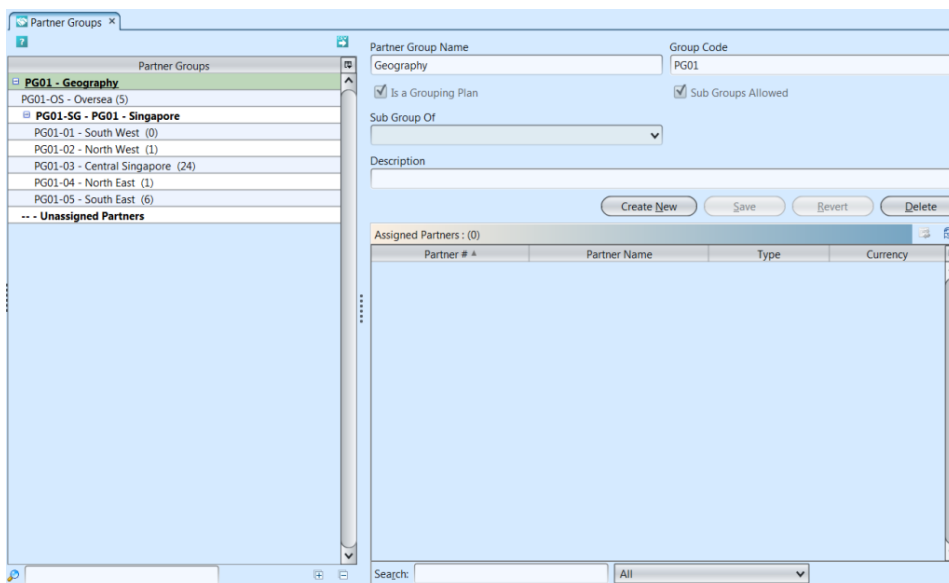


# Partner Groups

The purpose of Partner Group view is to manage company's partners like vendors, customer, and employees as partner groups; e.g. like your franchised operation where by your goods and services are sold through such sales channels. By managing partners into groups, it aids the company in the reporting and business analysis process. Below actions are available under ***"Partner Groups"***:

 Create new group; update, delete, view and search for details.



Field Name	Description	Mandatory Information
Partner Group Name	Name of the partner group	Y
Group Code	Custom code for the group	Y
Is a grouping plan	Tick the checkbox if it is a grouping plan	N
Subs groups allowed	Tick the checkbox if it allows subs group	N
Sub Group of	Select the main/parent partner group	N
Description	Description	N

## Create New Group

1. Click ***"Create New"*** button at the right side of

screen

The screenshot shows the 'Partner Groups' form. On the left, a tree view lists groups: 'PG01 - Geography' (expanded), 'PG01-OS - Oversea (5)', 'PG01-SG - PG01 - Singapore' (expanded), and its sub-groups: 'PG01-01 - South West (0)', 'PG01-02 - North West (1)', 'PG01-03 - Central Singapore (24)', 'PG01-04 - North East (1)', and 'PG01-05 - South East (6)'. At the bottom of the tree is 'Unassigned Partners'. The right pane shows the form for 'Geography' with 'Group Code' 'PG01'. The 'Is a Grouping Plan' checkbox is checked. The 'Sub Groups Allowed' checkbox is also checked. The 'Sub Group Of' dropdown is empty. The 'Description' field is empty. At the bottom right, the 'Create New' button is highlighted with a red box, along with 'Save', 'Revert', and 'Delete' buttons.

2. Fill up partner group's information

3. Tick on **"Is a Grouping Plan"** box if it is a master group plan. The **"Sub Groups Allowed"** box will be automatically ticked to allow creation of sub groups under the group

4. Tick on **"Sub Groups Allowed"** box to allow creation of sub groups under the group

This screenshot is similar to the previous one, but now both the 'Is a Grouping Plan' and 'Sub Groups Allowed' checkboxes are checked and highlighted with red boxes. The 'Sub Group Of' dropdown remains empty.

5. Choose a (parent) group from **"Sub Group Of"** drop-down list to assign the group under the selected (parent) group



In this screenshot, the 'Sub Group Of' dropdown menu is open and highlighted with a red box. It shows 'PG01-SG - PG01 - Singapore' as the selected option. The 'Is a Grouping Plan' checkbox is now unchecked, and the 'Sub Groups Allowed' checkbox is also unchecked.

6. Click **"Save"** button at the bottom of screen to save


## Update Group Details

1. Double click on group to be updated, it will bring up the selected group details on the right side of the screen


2. Right click on assigned partner in **“Assigned Partners”** table at the bottom right of screen, and select **“Move to Partner Group”** to reassign it to another group. It will pop up a window with list of available partner group to choose from

Assigned Partners : (24)				
Partner # ▲	Partner Name	Type	Currency	
4110.011/GU001	Guardian - H	Customer	SGD	 Move To Partner Group  Open Account Register
4110.011/ME001	Metro	Customer	SGD	
4110.011/MU001	Mustafa	Customer	SGD	
4110.011/RO001	Robinson	Customer	SGD	
4110.011/SA001	Sasa - HQ	Customer	SGD	
4110.011/SA002	Sasa - Gateway	Customer	SGD	
4110.011/SA003	Sasa - Changi	Customer	SGD	
4110.011/SA004	Sasa - Bugis	Customer	SGD	
4110.011/SE001	Sephora	Customer	SGD	
4110.011/TA001	Tang's Department Store	Customer	SGD	
4110.011/TA002	Takashimaya	Customer	SGD	
4110.011/WA001	Watsons - HQ	Customer	SGD	
6002.001/LO001	L'Oreal Singapore	Vendor	SGD	
6002.001/PG001	Procter & Gamble Prestige	Vendor	SGD	
6004/AX001	AXA Insurance Singapore Pte Ltd (SGD)	Vendor	SGD	
6004/CO001	Courts Singapore (SGD)	Vendor	SGD	
6004/EC001	Ecovis Bizcorp Management Pte Ltd	Vendor	SGD	
6004/SI001	SingTel (SGD)	Vendor	SGD	

Search:  All 1 / 24

 Move To Partner Group

**Move To Partner Group**  
 i Assign selected partners to another Partner Group.

 Please choose a Partner Group to which selected partners will be assigned to.

Partner Group:

3. Click **“Save”** button at the bottom of the screen when done with the updates

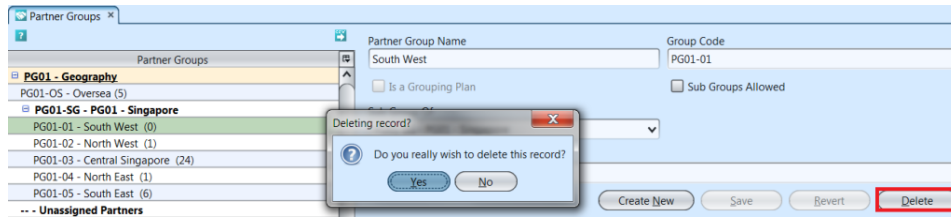
## Delete Group

1. Double click on group to be deleted, it will bring up the selected group on the right side of the screen

2. Click on **“Delete”** button at the right side of screen

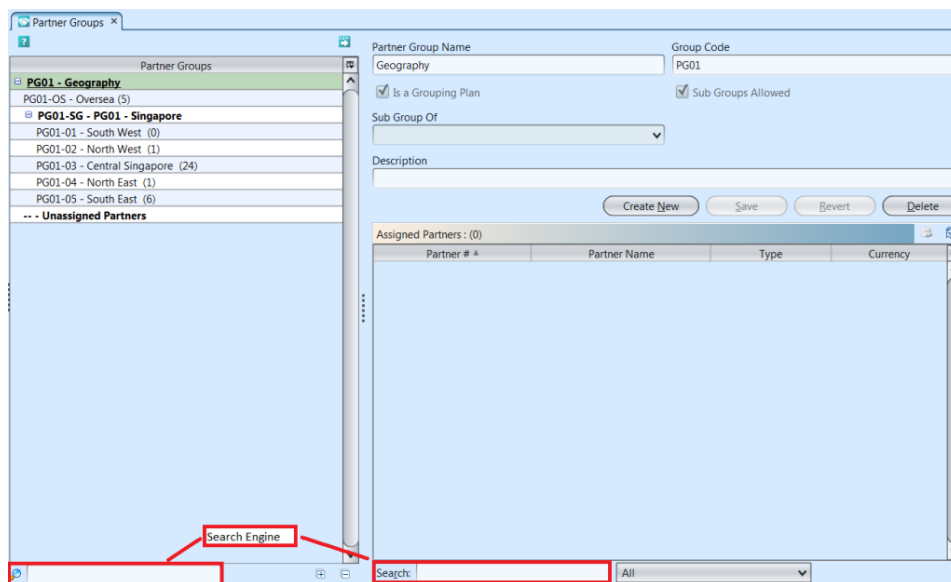
3. Click on **“Yes”** button on the pop-up window to

confirm group deletion



## View and Search for Account Details

1. Enter search parameter to filter the result, i.e. type in the group name in the search textfield box at the bottom left of the screen.



2. Double click on group to view, it will bring up the selected group details on the right side of the screen

3. Right click on assigned partner in the bottom right table to open and view it's register entries

4. Click  button on top of screen to export the partner groups as CSV file

# Assigned Partner Groups



1. Click the **“Unassigned Partners”** at the list of Partner Group

Partner Groups	
PG01 - Geography	
PG01-OS - Oversea (5)	
PG01-SG - PG01 - Singapore	
PG01-01 - South West (0)	
PG01-02 - North West (1)	
PG01-03 - Central Singapore (24)	
PG01-04 - North East (1)	
PG01-05 - South East (6)	
-- - Unassigned Partners	


2. Right click on the mouse on a partner in the **“Assigned Partners”** table and select **“Move to Partner Group”**


Assigned Partners : (24)				
Partner # ▲	Partner Name	Type	Currency	
4110.011/GU001	Guardian - H	Customer	SGD	
4110.011/ME001	Metro	Customer	SGD	
4110.011/MU001	Mustafa	Customer	SGD	
4110.011/RO001	Robinson	Customer	SGD	
4110.011/SA001	Sasa - HQ	Customer	SGD	
4110.011/SA002	Sasa - Gateway	Customer	SGD	
4110.011/SA003	Sasa - Changi	Customer	SGD	
4110.011/SA004	Sasa - Bugis	Customer	SGD	
4110.011/SE001	Sephora	Customer	SGD	
4110.011/TA001	Tang's Department Store	Customer	SGD	
4110.011/TA002	Takashimaya	Customer	SGD	
4110.011/WA001	Watsons - HQ	Customer	SGD	
6002.001/LO001	L'Oreal Singapore	Vendor	SGD	
6002.001/PG001	Procter & Gamble Prestige	Vendor	SGD	
6004/AX001	AXA Insurance Singapore Pte Ltd (SGD)	Vendor	SGD	
6004/CO001	Courts Singapore (SGD)	Vendor	SGD	
6004/EC001	Ecovis Bizcorp Management Pte Ltd	Vendor	SGD	
6004/SI001	SingTel (SGD)	Vendor	SGD	
Search: <input type="text"/>		All ▼	1 / 24	

3. Choose a Partner Group and click **“Ok”**

 Move To Partner Group 

**Move To Partner Group**

 Assign selected partners to another Partner Group.

 Please choose a Partner Group to which selected partners will be assigned to.

Partner Group: