Category List

Module Guide: Category List (Project Transaction Types)

Module Location

Project > Project Purchasing > Category List

Module Objective

The **Category List** module serves as the master data hub for creating and managing a list of **Transaction Types or Project Categories**. The categories defined here (such as "FA Procurement" or "Improvement and Modification") will be used to classify various projects or purchasing activities.

1. Main View (Transaction Type List)

The main page of this module displays a list of all defined transaction types.

- **View**: This page displays all existing transaction types along with their status (active is marked with a green checkmark, inactive with a red cross).

2. Steps to Add a New Category

1. In the **Transaction Type** input box, type the name of the new category you want to add.

2. Click the **[Add]** button.

3. The new category will immediately appear in the list below with an active status.

3. Managing Categories

- **Modify**: You can change the name of an existing transaction type by clicking the edit icon (pencil) in the **Action** column.

- **Change Status**: You can activate or deactivate a category by clicking the green checkmark or red cross icon in the **Status** column.

Tips & Important Notes

- Although this menu might be called 'Category List', its function is to manage 'Transaction Types' for project purchasing.

- This is an important master data setup module for project classification and reporting. The categories created here will become selection options when creating other project documents.

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