Quick Reference Guide
Category Driven Clients and Vendors

Introduction

Category driven clients and vendors is a great feature that enables you to choose if **Client** or **Vendor** information, along with sub levels is **shown** or **hidden** in a claim item, based on the expense category selected.

As long as you have **Client** and/or **Vendor** activated in your Webexpenses account, you will be able to utilise this feature in the **Category** section of **Administration**.
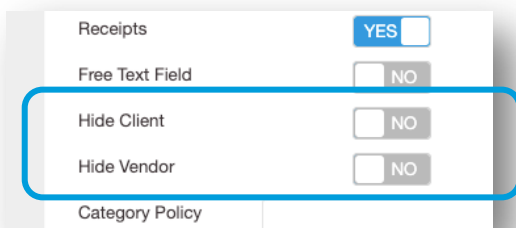
If the categories have been set at the Parent admin level for your account, then you will need to access the Parent level to apply the changes. If the categories have been set at Company/Division level, then you will need to access each Company/Division in turn to apply the changes.

Note: All Client and Vendor, Sub Client and Vendor information will be available in a claim for selection unless you choose to hide them against the category.
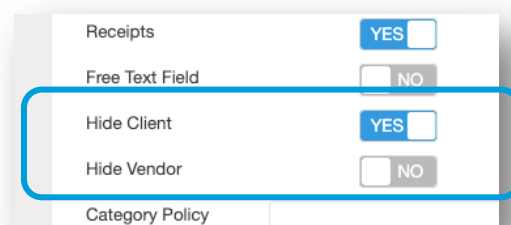
How to set up category driven clients and vendors

1 Ensure that you are logged into your Webexpenses account as an administrator

2 Navigate to **Administration** and select **Category**

3 Click on the category that you would like to amend

4 Scroll down the screen until you can see Hide Client and Hide Vendor

5 Click the **No** button to change it to **Yes** against **Client** and/**or Vendor**
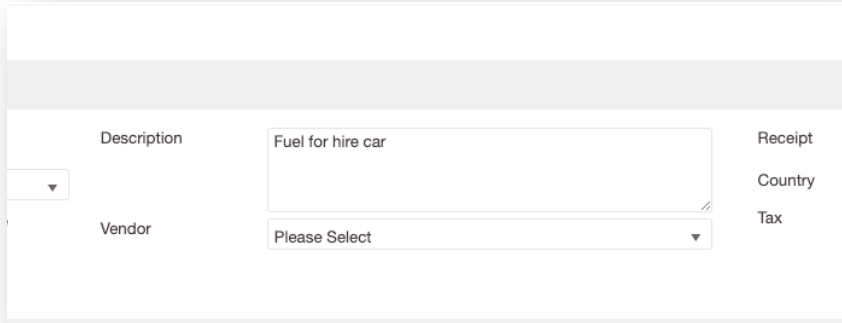
6 Click **Save** to keep your changes

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Now that the **Client** and/**or Vendor fields** have been hidden for this category, when the category is selected by a claimant in a claim item, the relevant drop-down selection menu will disappear. In the example below, we can see that I have hidden the Client field and now just Vendors are visible.