ACME User Guide: Account Category Management

In this ACME User Guide, you will learn:

- What are ACME Account Categories?
- Why are Account Categories Important?
- What are the uses of ACME Account Categories?
- Account Category Suggestions
- Creating a New Account Category
- Updating an Existing Account Category
- Removing an Existing Account Category

What are ACME Account Categories?

Account Categories are used throughout the ACME Platform. Their primary uses are:

- Reporting and business intelligence
- Discount assignment
- Audience classification

Use Case: The Museum wants to know how many elementary schools visited during the previous fiscal year. By creating and assigning an "Elementary School" category to all of the elementary school Accounts, they can report on this without creating individual ticket types for elementary schools.

This system of categorization allows them to report on the "Child" ticket type as a whole, and allows them to report on elementary school visits regardless of what type of ticket was sold.

Why are Account Categories Important?

Data integrity and segmentation is critical to analyzing and serving your customers. Account Categories help you in this endeavor by ensuring that all of your ACME Accounts are grouped into meaningful classes. Thinking through and using this system of categorization is extremely important to many areas of the system. It's so important, in fact, that Accounts cannot be created in ACME without being associated with an Account Category.

What are the uses of ACME Account Categories?

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Account Category Suggestions

Thinking though reporting and data analysis goals is critical to a successful Account Category structure. Here are some Account Category suggestions that you can use as a starting place for choosing your Account Categories:

- Tour Operators
- Businesses
- Internal Clients
- Civic Organizations
- Non-Profits
- Religious Groups
- Elementary Schools
- Middle Schools
- High Schools
- Colleges/Universities

Creating a New Account Category

If you've taken the time to decide what categories work best for your business, this process should be quick and easy. This is generally a one-time process, but you can always add new account categories as the needs of the business change.

Step-by-Step Guide

1. Navigate to the Accounts>Categories section of the main ACME Navigation Menu
2. Click on "+ Create Category"

3. Enter the name and the description in the "Create Category" dialog
4. Click "Create Category" to save your changes

The account category is immediately available for use with new and existing Accounts. For more information on assigning Account Categories to Accounts, see the Accounts ACME User Guide.

Updating an Existing Account Category

Account Categories can be edited directly in the Account Category table view. Changes to the names and descriptions made in this view will have an immediate and global impact on all existing Accounts associated with the category.

1. Navigate to Accounts>Categories in the main ACME Navigation Menu
2. Double click on the actual data field that you want to update to make the field editable
   Example: If you want to change "Tour Op" to "Tour Operator," double-click on "Tour Op" under the "Name" column in the "Tour Op" row.
3. Enter the new value into the field
4. Click "Update" at the bottom of the Categories list to save your changes

Removing an Existing Account Category

To remove an existing Account Category, simply click the "Remove" link next to the Category that you want to remove in the Account Categories list found at Accounts>Categories.

Note: Because Account Categories are required, deleted categories will not be automatically removed from existing Accounts that have been associated to the deleted category. If you want to change the category of existing accounts, you must reassign each account through the Accounts interface.