

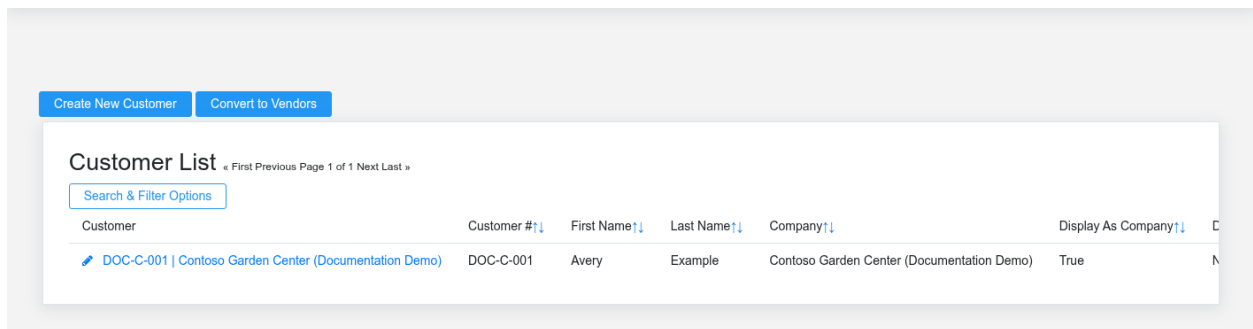
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Management

Management

Management overview



The Management workspace related to this reference article.

Management contains the master records that give transactions their business context. Customers, vendors, employees, departments, divisions, tax codes, freight zones, fulfillment methods, and navigation choices are reused across sales, purchasing, accounting, service, payroll, and reporting. Change them as shared configuration, not as isolated contact records.

Choose the record that owns the decision

- Use [Customers](#) for billing, tax, price, credit, statement, and contact defaults that follow the buyer into sales and receivables.
- Use [Vendors](#) for supplier and payee identity, payment terms, purchasing, vendor invoices, credits, payments, and 1099 context.
- Use [Employees](#) for the worker identity linked to logins, time, payroll, sales, service, approvals, and accountability.
- Use [Departments](#) and [Divisions](#) to assign responsibility and reporting context; do not create near-duplicates to work around an incorrect assignment.
- Use [Customer Classes](#), [Customer Tax Codes](#), and [Discount Schedules](#) for reusable commercial policy.

- Use [Freight Zones](#) and [Fulfillment Methods](#) for consistent delivery, pickup, and shipping behavior.

Understand downstream impact

Editing a master record can change defaults on future transactions without rewriting historical documents. Disabling an obsolete record is usually safer than deleting it when sales, invoices, payments, time entries, or reports still refer to it. Before merging or replacing records, check whether the business needs the old identity preserved for audit, tax, customer service, or vendor history.

Working safely with shared setup

Search by name, number, email, and status before creating a new record. Confirm the warehouse or division context when the same organization operates in more than one location. Treat credit limits, tax treatment, pricing defaults, payment terms, and employee access as controlled business decisions. After a material change, open a representative downstream screen and confirm the new default appears where intended.