SedonaSetup - CM - Customer Groups

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The Customer Group is used to group your Customers together so that you are able to apply security within that particular group. For example, if you have different branch offices, you may limit employees to which customer records they may access. This additional level of security is activated under the User setup table found in SedonaSetup in conjunction with a setting under Setup Processing for Accounts Receivable within SedonaSetup.

A User may be assigned to one or multiple Customer Groups. If your company activates this security functionality, every customer must be assigned to a Customer Group. The Customer Group field is assigned to the Customer on the Customer Setup Information form.

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