Add a New GL Account

Last Modified on 01/10/2023 2:52 pm EST

To setup a new G/L Account, follow the instructions below.

1. Navigate to the General Ledger module from the Main Application Menu and select the Chart of Accounts option.
2. The Chart of Accounts list will be displayed. Click the New button located at the lower right of the form.
3. The Chart of Accounts Edit form will be displayed.

Account Code - Enter the new Account Number; the number of digits must be the same as established in your company setup.

Description - Type in a Description for the account; the User may enter up to 50 characters into this field.

Account Type - Select the appropriate account type from the drop-down list.

When finished, click the Save button.

If the User has entered an account number that already exists, an error message will be displayed. If you review the account list and do not find the account number that the application will not allow you to enter, it is because the account exists but has been inactivated.