

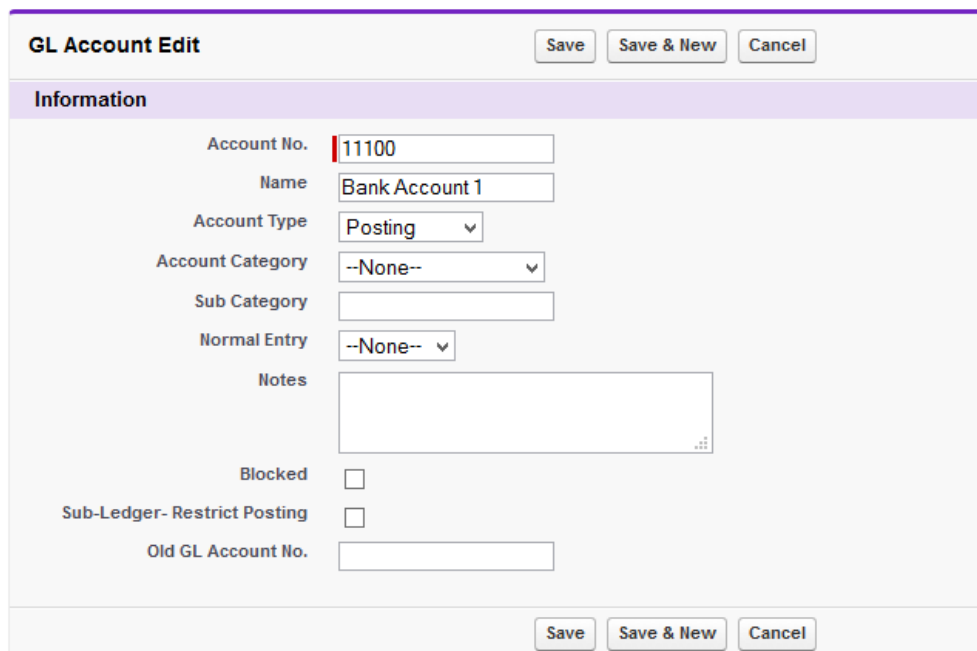
How to Set Up a GL Account

Description

Use this function to set up a GL Account number in the system

Step by Step

- 1 Navigate to the GL Account tab. If you do not see this listed with the rest of your tabs, click on the plus sign (+) to the right of your tabs. Here you will see a full list of tabs in the system. Click on **GL Account**.
- 2 Click **New**
- 3 Enter an **Account Number**
- 4 Enter an **Account Name**
- 5 Select an **Account Type**
- 6 Select an **Account Category**
- 7 Optionally, enter a **Sub Category**
- 8 Verify the data and click **Save**



The screenshot shows the 'GL Account Edit' window. At the top right are buttons for 'Save', 'Save & New', and 'Cancel'. Below the title bar is a purple header labeled 'Information'. The form contains the following fields:

- Account No.: 11100
- Name: Bank Account 1
- Account Type: Posting (dropdown)
- Account Category: --None-- (dropdown)
- Sub Category: (empty text box)
- Normal Entry: --None-- (dropdown)
- Notes: (empty text area)
- Blocked:
- Sub-Ledger- Restrict Posting:
- Old GL Account No.: (empty text box)

At the bottom right of the form are buttons for 'Save', 'Save & New', and 'Cancel'.