

How to Add Account Group column

The **Account Group** column is used to show the account's Account Group. This is a useful information on report, which tells you what Account Group the said Account or Primary Account it belongs to.

Follow these steps on how to create Account Group column type.

1. A new row will be available in the grid section.
2. In the **Column Type** field, select Account Group.
3. In the **Column Name** field, enter the name you would like to call the column. The value entered in this field may show on your financial report, granted the Caption field for that column is set to Column Name. This is discussed more on [How to Add Column Name Row](#).
4. In the **Caption** field, select the type of caption you want for the column. This is discussed more on [How to Add Column Name Row](#).
5. In the **Width** field, set it to your desired column width. By default it is set to 160 pixels, which is approximately 1 1/4 inches.
6. In the **Alignment** field, set how the value for the column be displayed.
 - Select **Center** if you want it Centered
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7. There is an ability to show or hide the column. Check the Hidden checkbox if you decide to hide the column. This is discussed more on [How Hidden checkbox works when enabled](#).
8. All other fields are not anymore necessary so you can leave those out.

This is how Account Group column will look like when you follow the above steps.

The screenshot shows the 'Column Designer - Balance Sheet - June 18, 2019 17:8:32' window. The 'Details' tab is active. The 'Column Name' is 'Balance Sheet - June 18, 2019 17:8:32', 'Description' is 'Standard Balance Sheet Template', 'Column Type' is 'User Defined', and 'Run Date' is '06/18/2019'. Below the header, a table lists columns C1 through C6. Column C6 is highlighted in yellow and has the following details: ID: C6, Column Type: Account Group, Column Name: Account Group, Caption: Column Name, Start Offset: BOT, End Offset: EOY-1yr, Start Date: 01/01/1900, End Date: 12/31/2018, Column Calculation: Add Record, Segment Filter: Add Record, and Budget Co: Add Record.

Here's how it is shown when report is previewed/printed. Highlighted is the **Account Group** column type.

Balance Sheet - June 18, 2019 17:8:32					Tuesday, June 18, 2019 5:30 PM	
As Of 6/18/2019						
Asset	Current Year	Current Units	Prior Year	Prior Units	Account Group	
Asset	36,833,747	28,888,484	36,784,008	28,888,448	Asset	
Cash Accounts	-78,974,657	-29,108,321	-78,450,665	-29,108,477	Cash Accounts	
Receivables	25,093,755	3,707,917	24,712,221	3,692,217	Receivables	
Prepays	1,790,236	1,327,749	1,790,236	1,327,749	Prepays	
Inventories	864,493,971	70,990,725	849,891,602	68,275,685	Inventories	
Other Assets	-1,455,918	-7,327,749	-1,455,736	-7,089,174	Other Assets	
Total Assets :	847,781,134	68,478,805	833,271,666	65,986,448		

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Column Designer - Balance Sheet - August 07, 2018 15:19:50

New Save Search Delete Undo Duplicate Import Export Close

Details Audit Log

Column Name: Balance Sheet - August 07, 2018 15:19:50 Description: Standard Balance Sheet Template Column Type: User Defined Run Date: 08/07/2018

+ Insert X Remove Export View Filter (F3)

ID	Column Type*	Column Name	Caption	Start Offset	End Offset	Start Date	End Date	Column Calculation	Segment Filter	Budget Co
C1	None	None	Column Name							Add Record
C2	Row Id	Row Id	Column Name							Add Record
C3	Row Name	Row Name	Column Name							Add Record
C4	GL Amounts	Current Year	Column Name	BOY	0	01/01/2018	08/31/2018			Add Record
C5	Units	Current Units	Column Name	BOY	0	01/01/2018	08/31/2018			Add Record
C6	GL Amounts	Prior Year	Column Name	BOY-1yr	EOY-1yr	01/01/2017	12/31/2017			Add Record
C7	Units	Prior Units	Column Name	BOY-1yr	EOY-1yr	01/01/2017	12/31/2017			Add Record
C8	Account Group	Account Group	Column Name							Add Record

Here's how it is shown when report is previewed/printed. Highlighted is the **Account Group** column type.

Balance Sheet - August 07, 2018 15:19:50
As Of 8/7/2018

Friday, August 24, 2018 6:55 PM

None	Row Id	Row Name	Current Year	Current Units	Prior Year	Prior Units	Account Group
	R2	Revenue	258,638	107,842	2,352,285	266,628	Revenue
	R3	Expense % Year / or \	1,479,010	1,773,460	-27,106,198	209,582	Purchases Discounts
	R5	Total	1,737,648	1,881,302	-24,753,913	476,210	

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ID	Column Type*	Column Name	Caption	Start Offset	End Offset	Start Date	End Date	Column Calculation	Segment Filter	Budget Code	Percentage	Width	Alignment	Format	Date Override	Hidden
C1	None	None	Column Name						Add Record			160	Left		<input type="checkbox"/>	<input type="checkbox"/>
C2	Row Id	Row Id	Column Name						Add Record			160	Left		<input type="checkbox"/>	<input type="checkbox"/>
C3	Row Name	Name	Column Name						Add Record			300	Left		<input type="checkbox"/>	<input type="checkbox"/>
C4	GL Amounts	Dollar Amount	Column Name	BOY-1yr	EOY-1yr	01/01/2017	12/31/2017		Add Record			160	Right	##0.00;(##0.00)	<input type="checkbox"/>	<input type="checkbox"/>
C5	Units	Units	Column Name	BOY-1yr	EOY-1yr	01/01/2017	12/31/2017		Add Record			160	Right	##0.00;(##0.00)	<input type="checkbox"/>	<input type="checkbox"/>
C6	Column Calculation	Cost Per Unit	Column Name					C4/C5	Add Record			160	Right	##0.00;(##0.00)	<input type="checkbox"/>	<input type="checkbox"/>
C7	Account Group	Account Group	Column Name						Add Record			160	Right		<input type="checkbox"/>	<input type="checkbox"/>

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Name	Row Id	Name	Dollar Amount	Units	Cost Per Unit	Account Group
	R3	Revenue	2,352,285.36	268,705.53	8.82	Revenue
	R4	Expense	(27,194,258.28)	209,587.86	(129.32)	Purchases Discounts
	R6		29,456,543.64	57,117.67	515.72	

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Column Designer - Trial Balance Detail - February 10, 2016 16:59:56

New Save Search Delete Undo Duplicate Close

Details

Audit Log (3)

Column Name: Trial Balance Detail - February 10, 2016 16:59:56

Description: Trial Balance Detail Template

Run Date: 02/10/2016

+ Insert

✕ Remove

↕ Arrange

⌘ Layout

🔍 Filter Records (F3)

<input type="checkbox"/>	ID	Column Type	Column Name	Caption	Start Offset	End Offset	Start Date	End Date	Column Calculation	Segment Filter	Budget Code	Percentage	Width	Alignment	Format	Hidden
<input type="checkbox"/>	C1	Row Name		Column Name									400	Left	#,##0	<input type="checkbox"/>
<input type="checkbox"/>	C2	Beginning Balance	Beginning Balance	Column Name	BOT	EOY-1yr	01/01/1900	12/31/2015					140	Right	#,##0	<input type="checkbox"/>
<input type="checkbox"/>	C3	Debit	Total Debit	Column Name	0	0	02/01/2016	02/29/2016					140	Right	#,##0	<input type="checkbox"/>
<input type="checkbox"/>	C4	Credit	Total Credit	Column Name	0	0	02/01/2016	02/29/2016					140	Right	#,##0	<input type="checkbox"/>
<input type="checkbox"/>	C5	Debit Units	Total Debit Units	Column Name	0	0	02/01/2016	02/29/2016					140	Right	#,##0	<input type="checkbox"/>
<input type="checkbox"/>	C6	Credit Units	Total Credit Units	Column Name	0	0	02/01/2016	02/29/2016					140	Right	#,##0	<input type="checkbox"/>
<input type="checkbox"/>	C7	Ending Balance	Ending Balance	Column Name	BOT	0	01/01/1900	02/29/2016					140	Right	#,##0	<input type="checkbox"/>
<input type="checkbox"/>	C8	Account Group	Account Group	Column Name									160	Right	#,##0.00;(#,##0.00)	<input type="checkbox"/>

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[illegible]