How To Edit Accounts

1. 1.From **GL Account Detail** menu | Chart of Accounts Tab, click on Account Id hyperlink to open Edit Account screen.

GL Account Detail

Open   Structure   Groups   Segments   Build   Regenerate Names   Clone   Re

| Chart of Accounts | Transactions |

Layout   🔍 Filter Records (F3)   352 records

	Account Id	Description
☐	10100-00	FIFTH THIRD
☐	101105	HUNTINGTON 5781
☐	10120-00	HUNTINGTON 9289
☐	10130-00	SAVINGS
☐	10140-00	Chemical Bank
☐	10200-10	TILL CASH

2. In the Edit account screen, user can now start editing the account. The fields that be edited are the following: **Description**, **Account Group** (as long as Account type will not change), **Active**, **System**, **Unit, Cash Flow Category,Comments, Functional Currency, Currency Exchange Rate and Should be Revalued.**

> ⚠ For used accounts, Functional Currency is no longer editable.

3. Click **Save** toolbar button to save the changes.
4. To edit account ID, click the Account ID hyperlink in edit account screen.

Edit Account - 10003-0007-000

Save   Undo   Delete   Close

| Account Details | Audit Log |

Account ID

Description

Account Grou **Select New Account ID**

Account Type   Ok   Cancel

Active

System | Details |

Unit   Select Structure

Cash Flow Cat   Select Code

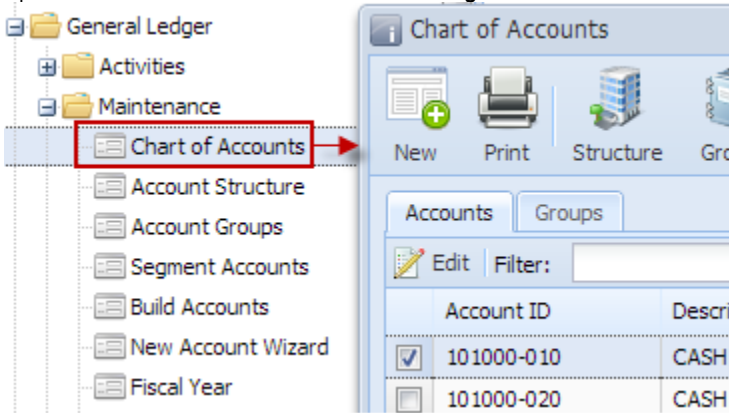Comments   Result :

5. Select Structure to edit
6. Select available code to be use.
7. Results can be seen below the screen.
8. Click **Save** toolbar button to save the changes.

Here are the steps on how to edit your existing accounts:

1. Open **Chart of Accounts** screen from **General Ledger Maintenance > Chart of Accounts**.

2. Select the account you want to edit and click **Edit** action button to open **Edit Accounts** screen.
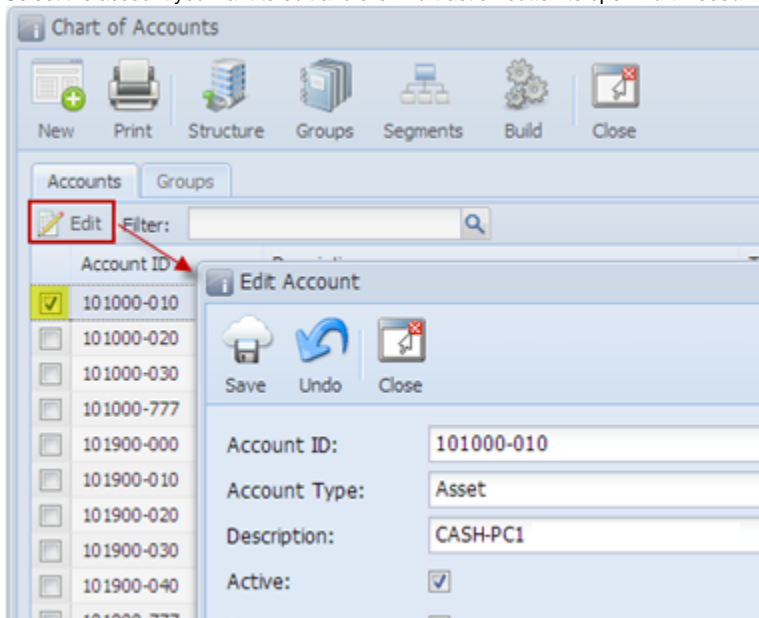
3. You can now start editing the account. The fields that can only be edited are the following: **Description**, **Active**, **System**, **Unit, Cash Flow Category** and **Comments**.

Edit Account

Save Undo Close

Account ID:	101000-010
Account Type:	Asset
Description:	CASH-PC1
Active:	☑
System:	☐
Unit:	lbs
Cash Flow Category:	
Comments:	

Help Edited   1 of 1

⚠ If the account is already used in any transaction, Unit field can no longer be edited.