

How To Add Account Groups and Subgroups

Here are the steps on how to add account groups and subgroups:

- 1. From **GL Account Detail** menu, click on **Group** to open **Account Groups**.
- 2. To add an account group, first select what type of account the group should be a part of from the **Account Types** area. Choose from **Asset**, **Liability**, **Equity**, **Revenue** and **Expenses**.

Account Groups

New Save Delete Refresh | Structure Segments | Close

Account Types	Begin Range	End Range
All		
Asset	1000	1999
Liability	2000	2999
Equity	3000	3999
Revenue	4000	4999
Expense	5000	5999

- 3. Once you have selected the Account Type, select an account group from the right panel. You can still select the account type itself from this panel.
- 4. Click **New** toolbar button on the Account Groups screen. The **Account Subgroup** screen of the selected account type or group will open. The account type will automatically be a **Parent Group**.

Account Groups

New Save Delete Refresh | Structure Segments | Close

Account Types	Begin Range	End Range
All		
Asset	10000	19999
Liability	20000	29999
Equity	30000	39999
Revenue	40000	
Expense	50000	

Asset

Current Assets

Non-Current Assets

Fixed Assets

Account Subgroup

Save Undo Close

Details

Parent Group: Asset

Open Remove Filter:

Subgroup

Current Assets

Non-Current Assets

Fixed Assets

- 5. Click on the empty row of the grid to add subgroups for the selected type or group, for this example, on **Asset**. And then enter the name of the subgroup you want to add.
- 6. Click **Save** button to save newly added groups.
- 7. Select one subgroup and click **Edit** action button. Another **Account Subgroup** screen will open. This time, subgroup added from the previous group will be the **Parent Group**. Add subgroups for the selected group.

8. You can also select account subgroups directly from the Account Groups screen and click **New** toolbar button. Account Subgroup screen will open showing the subgroup as the Parent Group.
9. Click on the empty row of the grid to add subgroups for the selected group and then enter the name of the subgroup you want to add. Click Save before closing the screen to save newly added subgroups.
10. Click **Refresh** button to reload Account Groups screen and see the newly added groups.
11. All the groups and subgroups added are displayed on Account Groups screen in tree like format.