

How To Rename Accounts

To open **GL Account Adjustment** screen, click **Account Adjustment** from **General Ledger Maintenance** menu and then click **New** toolbar button.

Rename an Account ID

1. To rename an account Id, click **Add** action button.
2. Select **Rename** in **Action** combo box then select **Account ID** in **Type** combo box. In the **Original** combo box, select the account Id that you would want to rename and specify in the **New** field the correct account Id.

The screenshot shows the 'GL Account Adjustment' window. At the top, there's a toolbar with buttons: New, Save, Search, Delete, Undo, Commit, and Close. Below the toolbar, an 'Important' message states: 'You cannot move or delete Accounts or Groups from Cash Accounts, Receivables, Undeposited Funds, Credit Card and Payables. Click the Commit button to update the accounts.' The 'User Name' is 'AGADMIN', 'Adjustment Date' is '11/27/2013', and 'Transaction ID' is empty. The 'Description' field contains 'Rename 101000-000 to 102000-000'. Below this is a table with columns: Action, Type, Original, and New. The 'Action' column has a dropdown menu with 'Rename', 'Move', and 'Delete'. The 'Type' column has a dropdown menu with 'Account ID' and 'Account Group'. The 'Original' column has a dropdown menu with 'Filter Records (F3)' and '220 records'. The 'New' column has a text input field with 'enter new Account ID'. A list of account IDs is shown in the 'Original' column, including 101000-000, 101000-010, 101000-020, 101000-030, 101000-040, 101900-000, 101900-010, 101900-020, 101900-030, 101900-040, 106040-000, and 106040-010. Red arrows point to the 'Rename' action, 'Account ID' type, and the account ID list. A red box highlights the 'enter new Account ID' field.

3. Click the **Commit** button. Clicking the Commit button will cascade update all the affected tables and rename the old account Id to the new account Id.
4. After GL Account Adjustment is committed, the screen is marked as **Committed**.

Limitations in Renaming an Account ID

1. You cannot rename an Account Id with a non-existing primary code or segment. You need to manually add first the primary code and /or segment codes on the Segment Accounts screen in order to use the account ID.
2. You cannot rename an Account Id if the new Id entered is already existing in the Chart of Accounts table.

Rename an Account Group

1. To rename an Account Group, click **Add** action button.

2. Select **Rename** in **Action** combo box then select **Account Group** in **Type** combo box. In the **Original** combo box, select the account group that you would want to rename and specify in the **New** field the correct account group.

The screenshot shows the 'GL Account Adjustment' window. At the top, there is a toolbar with icons for New, Save, Search, Delete, Undo, Commit, and Close. Below the toolbar, an 'Important' message states: 'You cannot move or delete Accounts or Groups from Cash Accounts, Receivables, Undeposited Funds, Credit Card and Payables. Click the Commit button to update the accounts.' Below this, there are input fields for 'User Name: AGADMIN', 'Adjustment Date: 11/28/2013', and 'Transaction ID:'. A 'Description:' field is also present. The main area contains a table with columns: Action, Type, Original, and New. The 'Action' column has a dropdown menu with 'Rename', 'Move', and 'Delete'. The 'Type' column has a dropdown menu with 'Account ID' and 'Account Group'. The 'Original' column has a dropdown menu with 'Filter Records (F3)' and '31 rec'. The 'New' column has a dropdown menu with 'enter new Account Group name'. A list of account groups is displayed below the table, including Cash Accounts, Credit Cards, Current Assets, Current Earnings, Current Liabilities, Fixed Assets, Inventory, Labor Revenue, Long Term Debt, Non-Current Assets, Other Assets, and Other Expenses. Red arrows point to the 'Rename' action, the 'Account Group' type, and the 'enter new Account Group name' field. A red box highlights the list of account groups, with a red arrow pointing to 'Fixed Assets' and a label 'select Group'.

3. Click the **Commit** button. Clicking the Commit button will cascade update all the affected tables and rename the old account group to the new account group.
4. After **COA Adjustment** is committed, the screen is marked as **Committed**.

Limitations in Renaming an Account Group

1. You cannot rename a *System Account Group*. These are the account groups automatically loaded into all new installations for new customers.
2. You cannot rename an Account Group if the new group name entered is already existing in the Accounts Group table.



Once the Commit button is clicked, there will be no way you can Uncommit or Undo this change. If you need to revert your changes, then you must create a new COA Adjustment transaction for that.