

How To Import Primary Accounts for a New Template

Here are the steps on how to import primary account codes for a new template:

1. On a new **Account Template** screen, click **Import** button. **Import Primary Accounts from CSV** screen will open.
2. Click **Browse** button and select the CSV file where primary account codes to be imported is saved.
3. Click **Import** button to start import process.
4. Message informing user if importing is successful or not will prompt. Click **OK** to close the message.
5. If the importing is successful, imported primary codes will be displayed on the **Account Templates** screen.