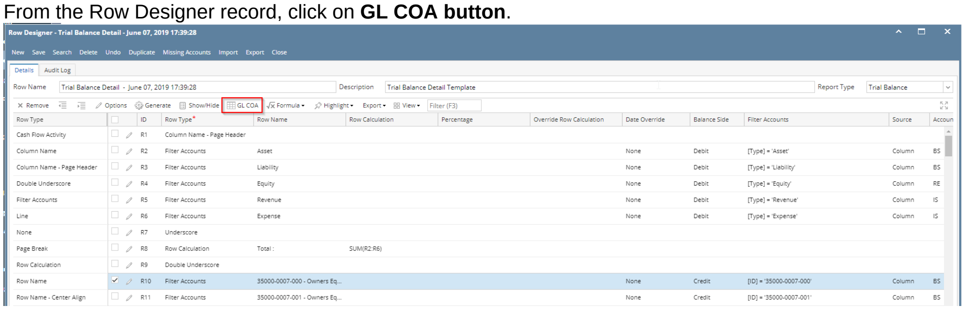
How to Configure Account Filter using Chart of Accounts screen

The Chart of Accounts screen is used to configure accounts filter for the following rows.

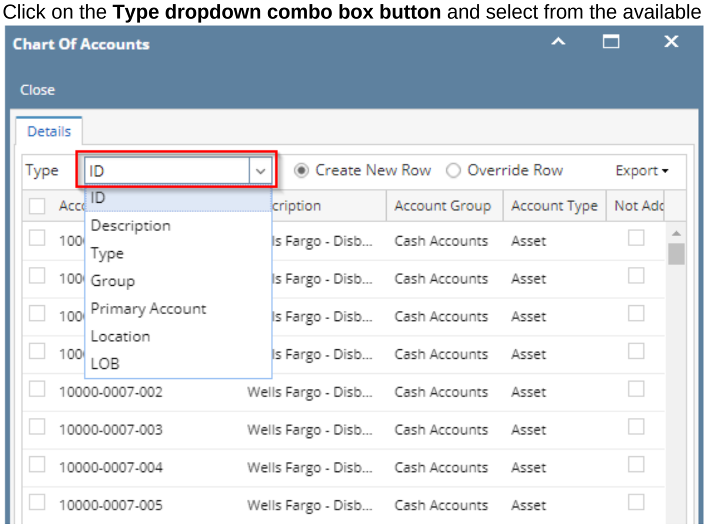
- Filter Accounts row
- Cash Flow Activity row

The following steps will guide you on how to setup filter accounts.

1. From the Row Designer record, click on **GL COA button**.



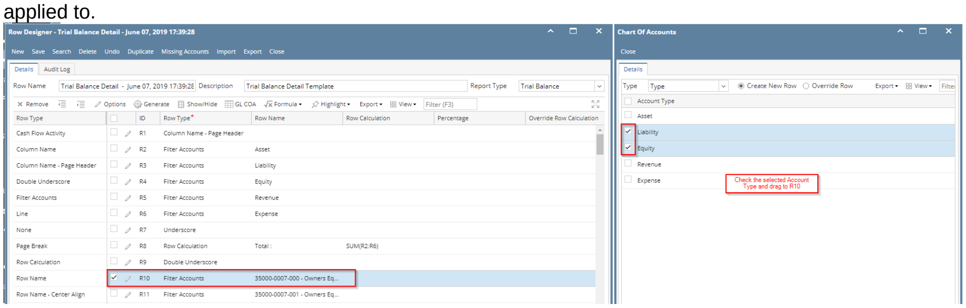
2. The **Chart of Accounts screen** will be opened.
3. Click on the **Type dropdown combo box button** and select from the available choices.



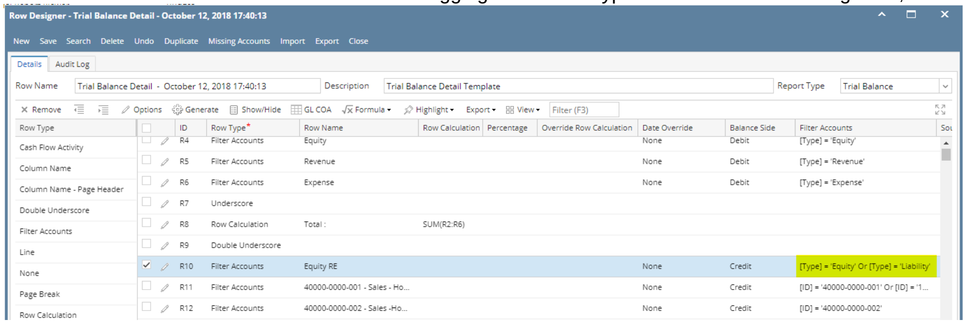
   There are different ways to configure filter accounts depending on your need. See below how the grid changes and how accounts can be configured depending on Type selected from the Type field.

   a. If **ID** is selected, Account IDs will be shown in the grid below it. Select the Account ID/s and click Apply button.
   b. If **Description** is selected, Account Descriptions will be shown in the grid below it. Select the Account Description/s and click Apply button.
   c. If **Type** is selected, Account Types will be shown in the grid below it. Select the Account Type/s and click Apply button.
   d. If **Group** is selected, Account Groups will be shown in the grid below it. Select the Account Group/s and click Apply button.
   e. If **Primary Account** is selected, Primary Accounts will be shown in the grid below it. Select the Primary Account/s and click Apply button.
   f. If **Location** is selected, Locations will be shown in the grid below it. Select the Location/s and click Apply button.

4. Select the Account/s, Description/s, Type/s, Group/s, Primary Account/s or Location/s and drag it to the row you want the Account filter to be applied to.



5. This is how **Filter Accounts** will like like after dragging of selected type to Current Year Earnings row,



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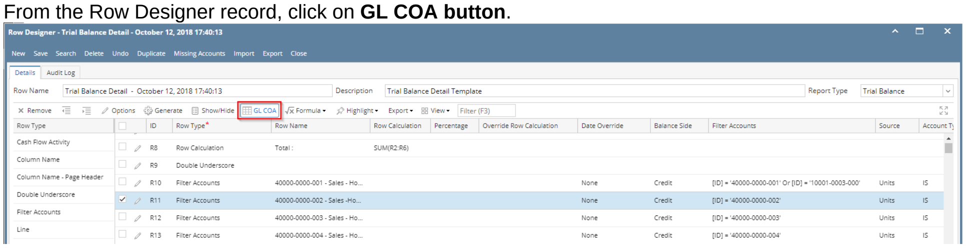

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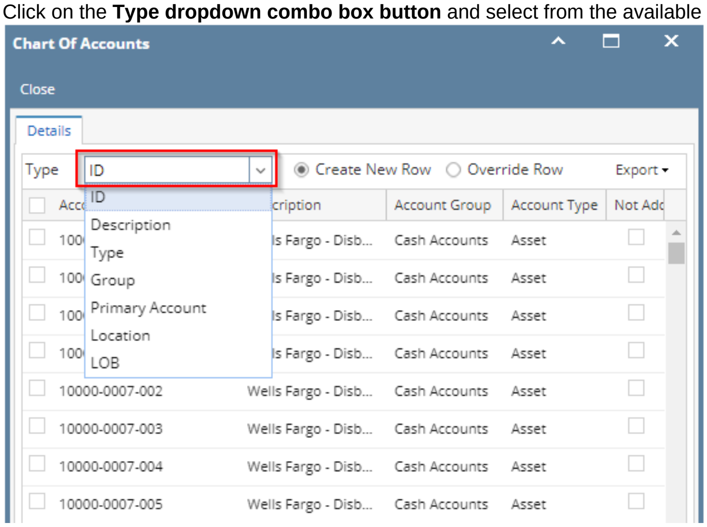

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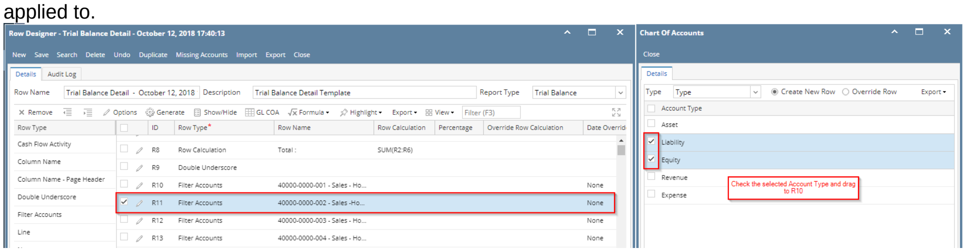

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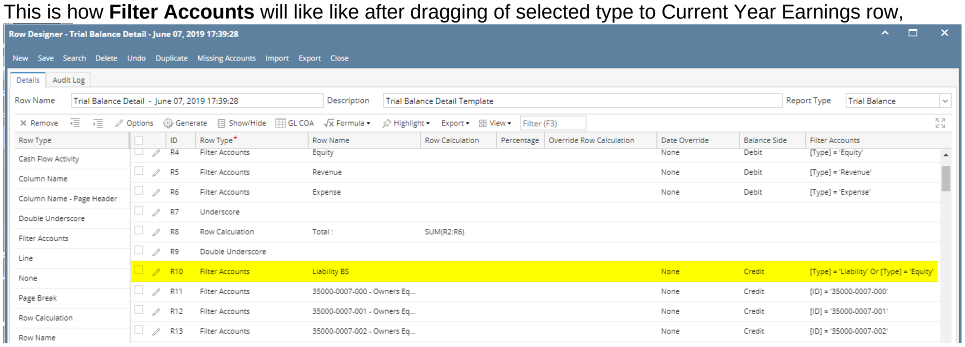

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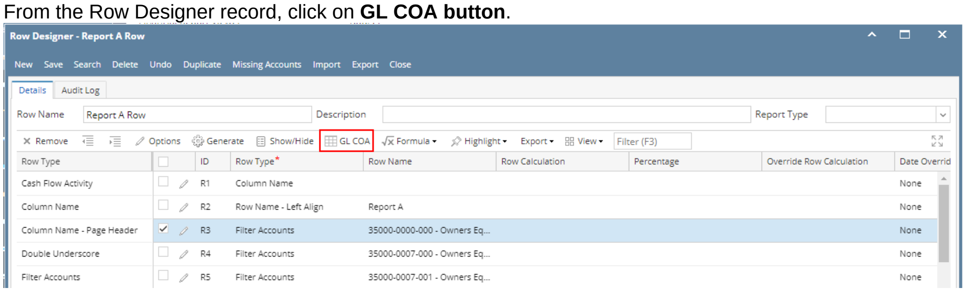

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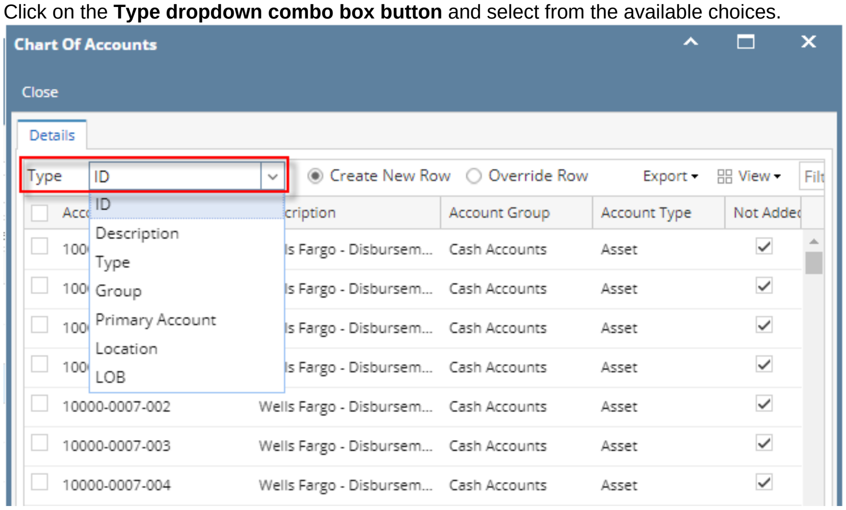

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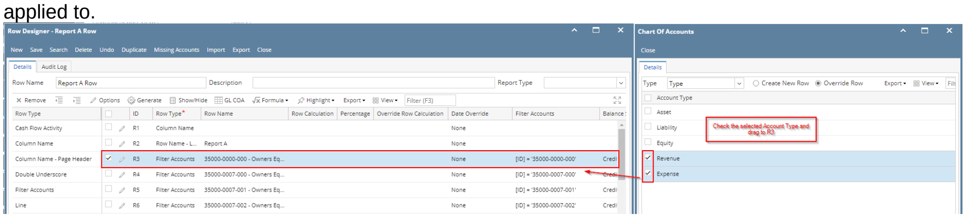

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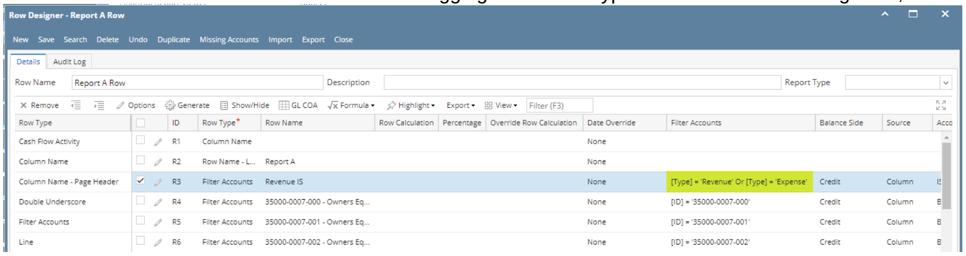

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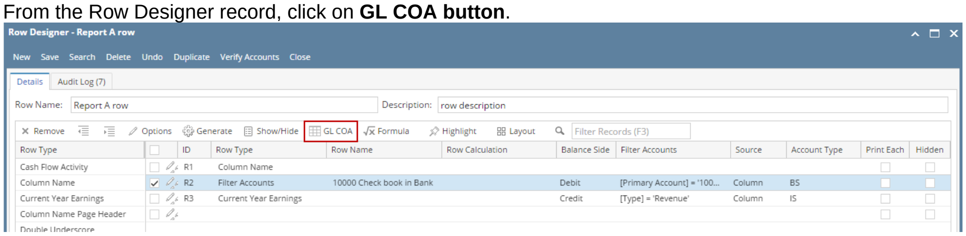

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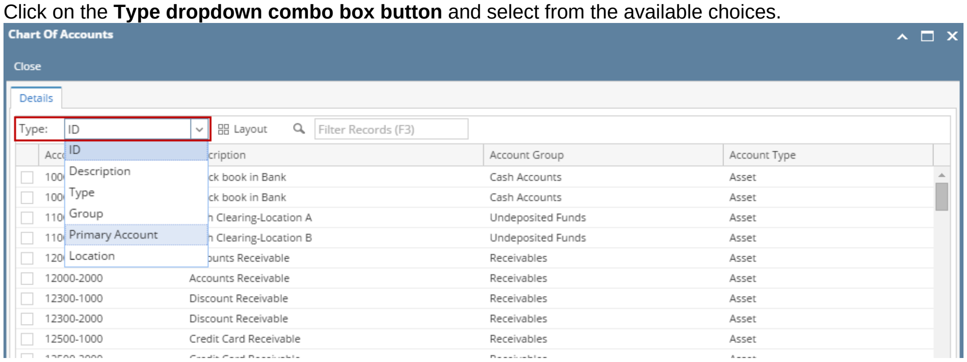

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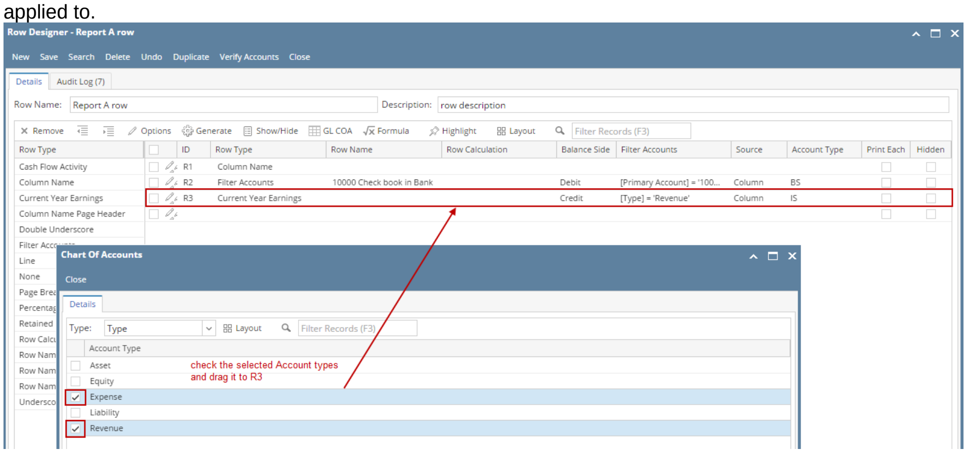

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