

# How to Configure a row

1. In the Row Type section select a row you want to add and drag it to the grid section (right part of the screen).
2. In the **Row Name field**, enter a name for the row. This field can be blank but it is recommended that you fill this in with a value that can easily tell you what row is that for.
3. The **Row Calculation field** is relevant only on the Row Calculation row type. This is discussed in detail on [How to Configure formula for Total Calculation row](#).
4. The **Balance Side field** is relevant only on the Cash Flow Activity, Current Year Earnings, Filter Accounts and Retained Earnings types of row. This is used to tell that the row will have an account with a Debit or Credit balance side.
5. The **Filter Accounts field** is relevant only on the Cash Flow Activity, Current Year Earnings, Filter Accounts and Retained Earnings types of row. This is used to assign an account filter, which can be by Account ID, Description, Account Group, Account Type, Primary Account or Location. This is discussed in detail on [How to Configure account filter for single row](#) and [How to Configure account filter for multiple rows](#).

This is a sample of row designer record where rows are added and configured.

Row Type	ID	Row Name	Row Calculation	Balance Side	Filter Accounts	Source	Print Each	Hidden
Cash Flow Activity	R1	Column Name						
Column Name	R2	Row Name - Left Align						
Current Year Earnings	R3	Filter Accounts		Debit	[Group] = 'Asset'	Column		
Column Name Page Header	R4	Filter Accounts		Debit	[Group] = 'Current Assets'	Column		
Double Underscore	R5	Filter Accounts		Debit	[Group] = 'Cash Accounts'	Column		
Filter Accounts	R6	Filter Accounts		Debit	[Group] = 'Undeposited Funds'	Column		
Line	R7	Filter Accounts		Debit	[Group] = 'Receivables'	Column		
None	R8	Filter Accounts		Debit	[Group] = 'Prepays'	Column		
Page Break	R9	Filter Accounts		Debit	[Group] = 'Inventories'	Column		
Percentage	R10	Filter Accounts		Debit	[Group] = 'Non-Current Assets'	Column		
Retained Earnings	R11	Filter Accounts		Debit	[Group] = 'Other Assets'	Column		
Row Calculation	R12	Filter Accounts		Debit	[Group] = 'Fixed Assets'	Column		
Row Name - Center Align	R13	Underscore						
Row Name - Left Align	R14	Row Calculation	SUM(R3:R12)					
Row Name - Right Align	R15	Double Underscore						
Underscore	R16	None						
	R17	Row Name - Left Align						
	R18	Filter Accounts		Credit	[Group] = 'Liability'	Column		
	R19	Filter Accounts		Credit	[Group] = 'Current Liabilities'	Column		
	R20	Filter Accounts		Credit	[Group] = 'Payables'	Column		
	R21	Filter Accounts		Credit	[Group] = 'Other Payables'	Column		
	R22	Filter Accounts		Credit	[Group] = 'Sales Tax Payables'	Column		
	R23	Filter Accounts		Credit	[Group] = 'Payroll Tax Liabilities'	Column		
	R24	Filter Accounts		Credit	[Group] = 'Customer Deposits'	Column		
	R25	Filter Accounts		Credit	[Group] = 'Pending Payables'	Column		
	R26	Filter Accounts		Credit	[Group] = 'Grain Payables'	Column		
	R27	Underscore						

Each row type will be discussed in detail on the following help topics.

- [How to Add Cash Flow Activity row](#)
- [How to Add Column Name row](#)
- [How to Add Column Name Page Header row](#)
- [How to Add Double Underscore row](#)
- [How to Add Filter Accounts row](#)
- [How to Add Line row](#)
- [How to Add None row](#)
- [How to Add Page Break row](#)
- [How to Add Percentage row](#)
- [How to Add Row Calculation row](#)
- [How to Add Row Name - Center Align row](#)
- [How to Add Row Name - Left Align row](#)
- [How to Add Row Name - Right Align row](#)
- [How to Add Underscore row](#)

1. A new row will be available in the grid section.
2. In **Description field**, enter a description for the row. This field can be blank but it is recommended that you fill this in with a value that can easily tell you what row is that for, especially for certain row types.
3. In **Row Type field**, select what type of row you would like to add.
4. The **Related Rows field** is relevant only on the Total Calculation row type. This is discussed in detail on [How to Configure formula for Total Calculation row](#).
5. The **Balance Side field** is relevant only on the Calculation, Hidden and Cash Flow Activity types of row. This is used to tell that the row will have an account with a Debit or Credit balance side.
6. The **Filter Accounts field** is relevant only on the Calculation, Hidden and Cash Flow Activity types of row. This is used to assign an account filter, which can be by Account ID, Description, Account Group, Account Type, Primary Account or Location. This is discussed in detail on [How to Configure account filter for single row](#) and [How to Configure account filter for multiple rows](#).

This is a sample of row designer record where rows are added and configured.

The screenshot shows the 'Row Designer' window with the following details:

- Row Name:** BSS
- Description:** Balance Sheet Summary
- Buttons:** New, Save, Search, Delete, Undo, Duplicate, Fonts, Generate Row, Verify Accounts, Total Calculations, Close.
- Actions:** Insert, Remove, Up, Down, Filter Records (F3).
- Table:**

ID	Description	Row Type	Related Rows	Balance Side	Filter Accounts
1		Line		Debit	
2		Description Title		Debit	
3	Assets	Left Title		Debit	
4	Total Assets	Calculation		Debit	[Type] = 'Asset'
5		Double Underscore		Debit	
6		None		Debit	
7	Liabilities	Left Title		Debit	
8	Total Liabilities	Calculation		Credit	[Type] = 'Liability'
9		Underscore		Debit	
10		None		Debit	
11	Equity	Left Title		Debit	
12	Equity - w/o RE	Calculation		Credit	[Type] = 'Equity' And [Group] <...
13	RE	Calculation		Credit	[Group] = 'Retained Earnings'
14	Total Revenues	Hidden		Credit	[Type] = 'Revenue'
15	Total Expenses	Hidden		Debit	[Type] = 'Expense'
16	Current Year Earnings	Total Calculation	R14 - R15	Debit	
17	Total Equity	Total Calculation	R12 + R13 + R16	Debit	
18		Underscore		Debit	
19	Total Liabilities & Equity	Total Calculation	R8 + R17	Debit	
20		Double Underscore		Debit	
- Status Bar:** Ready, Page 1 of 1.

Each row type will be discussed in detail on the following help topics.

- [How to Add Cash Flow Activity row](#)
- [How to Add Column Name row](#)
- [How to Add Column Name Page Header row](#)
- [How to Add Double Underscore row](#)
- [How to Add Filter Accounts row](#)
- [How to Add Line row](#)
- [How to Add None row](#)
- [How to Add Page Break row](#)
- [How to Add Percentage row](#)
- [How to Add Row Calculation row](#)
- [How to Add Row Name - Center Align row](#)
- [How to Add Row Name - Left Align row](#)
- [How to Add Row Name - Right Align row](#)
- [How to Add Underscore row](#)

1. A new row will be available in the grid section.
2. In **Description** field, enter a description for the row. This field can be blank but it is recommended that you fill this in with a value that can easily tell you what row is that for, especially for certain row types.
3. In **Row Type** field, select what type of row you would like to add.
4. The **Related Rows** field is relevant only on the Total Calculation row type. This is discussed in detail on [How to Configure formula for Total Calculation row](#).
5. The **Balance Side** field is relevant only on the Calculation, Hidden and Cash Flow Activity types of row. This is used to tell that the row will have an account with a Debit or Credit balance side.
6. The **Filter Accounts** field is relevant only on the Calculation, Hidden and Cash Flow Activity types of row. This is used to assign an account filter, which can be by Account ID, Account Group, Account Type or Primary Account. This is discussed in detail on [How to Configure account filter for single row](#) and [How to Configure account filter for multiple rows](#).

This is a sample of row designer record where rows are added and configured.

Row Name: Balance Sheet Description: Summary Balances per Account Type

ID	Description	Row Type	Related Rows	Balance Side	Filter Accounts
1		Line		Debit	
2		Description Title		Debit	
3	Assets	Left Title		Debit	
4	Total Assets	Calculation		Debit	[Type] = 'Asset'
5		Double Underscore		Debit	
6		None		Debit	
7	Liabilities	Left Title		Debit	
8	Total Liabilities	Calculation		Credit	[Type] = 'Liability'
9		Underscore		Debit	
10		None		Debit	
11	Equity	Left Title		Debit	
12	Equity - exclusive of RE	Calculation		Credit	[Type] = 'Equity' And [Group] <...
13	Retained Earnings	Calculation		Credit	[Group] = 'Retained Earnings'
14	Current Year Earnings	Total Calculation	R21 - R22	Debit	
15		Underscore		Debit	
16	Total Equity	Total Calculation	R12 + R13 + R14	Debit	
17		None		Debit	

Ready Page 1 of 1

this is the grid section

Each row type will be discussed in detail on the following help topics.

- [How to Add Cash Flow Activity row](#)
- [How to Add Column Name row](#)
- [How to Add Column Name Page Header row](#)
- [How to Add Double Underscore row](#)
- [How to Add Filter Accounts row](#)
- [How to Add Line row](#)
- [How to Add None row](#)
- [How to Add Page Break row](#)
- [How to Add Percentage row](#)
- [How to Add Row Calculation row](#)
- [How to Add Row Name - Center Align row](#)
- [How to Add Row Name - Left Align row](#)
- [How to Add Row Name - Right Align row](#)
- [How to Add Underscore row](#)