

How To Import Primary Accounts to an Existing Template

Here are the steps on how to add imported primary accounts to an existing template:

1. From **General Ledger** and click Segment Accounts to open **Segment Accounts** screen.
2. Click **Import Primary** toolbar button to open **Import Primary Accounts** screen.
3. Select a template from the **Select a Company Type** panel. Corresponding primary account codes imported for the selected template will be displayed in the grid on the opposite side of the panel.
4. Click **Import** button. **Import Primary Accounts from CSV** screen will open.
5. Click **Browse** button and select the CSV file where primary account codes to be imported is saved.
6. Click **Import** button to start import process.
7. Message informing user if importing is successful or not will prompt. Click **OK** to close the message.
8. After importing is successful, all primary account codes that are not existing on the selected template will be added. In case that on the selected file there are codes that are already existing, they will no longer be imported.