General Ledger

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Overview

This is what you might call the heart of the system. The chart of accounts is maintained in a general ledger, although accounts can also be accessed in other applications as well. You may browse any activity that occurred in a selected account.

Setup > Options > General Ledger needs to be set up before doing anything in the accounting system. SGA will do these setups in the implementation process.

To start adding accounts, you must first have the account divisions set up. General Ledger determines what type of account it is, as defined by the category. This is what defines whether the account is an asset, liability, fund balance, revenue, or expense. Once the account divisions and categories are set up, go to Accounts > New from the account menu.

To see how budgeting works, see the budget overview.

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