

Account Multiple Add

Last Modified on 02/21/2023 3:26 pm EST

Menu option is under Records > Accounts > New. This allows you to add multiple accounts at once. Select all account divisions that you wish to add and every combination of account# will be created.

It is suggested to always first click the Preview button to see a list of the accounts that are about to be created. Use caution to not create a large volume of accounts that will not be needed, as this has the potential of slowing down the system in the future. Click OK to proceed with adding the new accounts. A log will also be generated.

When adding accounts this way as opposed to one account at a time, there is no way to specify any other properties of an account upon add, such as report descriptions, etc. After adding new accounts, the global account edit can be used to assign report descriptions and/or update any other properties for a selected group of accounts, including those just added.
