

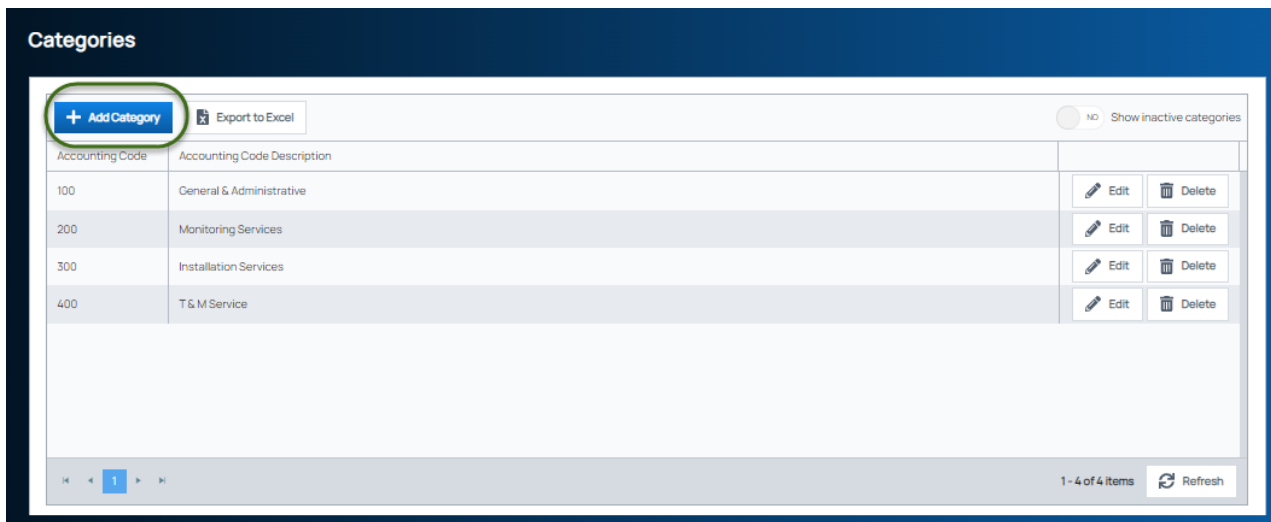
Add a Category

Last Modified on 05/23/2025 4:34 pm EDT

Categories are used for grouping income and expense transactions to produce departmentalized profit and loss statements.

From the main menu, arrive at the Categories setup with this path: Setup > Accounting > Categories.

The Categories list opens. Click on the Add Category button at the upper left of the form.



The Edit Category form is displayed. There are only two entry fields on the form, and both are required.

- **Code** — Type in a name or a number for the category. Maximum 25 characters.
- **Description** — This is a longer description of the category. Maximum 50 characters.

When finished, click the Save button at the bottom of the form.

