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.

Categories	Categories				
+ Add Category	Export to Excel	Mo Showi	nactive categories		
Accounting Code	Accounting Code Description				
100	General & Administrative	🖋 Edit	Delete		
200	Monitoring Services	<i>ø</i> ⁰ Edit	Delete		
300	Installation Services	Ø ⁹ Edit	Delete		
400	T & M Service	<i>₿</i> [®] Edit	Delete		
	H ≺ 1 > H 1-4of4ite		C Refresh		

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.

Edit Category	×
Code -	500
Code Description •	Inspection Services
Save	Cancel