

Edit a GL Account

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GL Accounts may be edited under certain circumstances.

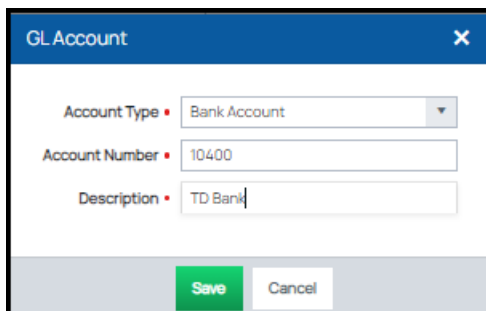
- Once a GL Account number has been used for a transaction, the account type can be only changed according to the following rules:
 - If the GL account was originally setup as a Balance Sheet type account the account type may only be changed to another Balance Sheet Type account.
 - If the GL account was originally setup as an Income Statement Type account, the account type may only be changed to another Income Statement Type account.
- If no transactions have ever been posted to the GL Account, you can change any or all of the data entry fields.

To edit a GL Account, from the main menu, arrive at the GL Accounts setup with this path: Setup > Accounting > Chart of Accounts.

The Chart of Accounts list opens. Locate the GL Account you want to edit, and then click the **Edit** button.

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The GL Account form opens. Make the necessary changes, and then click the **Save** button when finished.



The screenshot shows a window titled "GL Account" with a close button (X) in the top right corner. Inside the window, there are three labeled fields: "Account Type" with a dropdown menu showing "Bank Account", "Account Number" with a text box containing "10400", and "Description" with a text box containing "TD Bank". At the bottom of the window, there are two buttons: a green "Save" button and a white "Cancel" button.