Adding a new account code to a company record

Refers to:
Companies form → selection tab

To add a new account code to a company record:

- Click on the **Companies** icon to open up the **Company Selector** form.
- Type in the name of the company you wish to look for and click on the **Find** button.
- **Double click** on the required company or highlight it and click on the **Expand button** to open record.
- Click on the **Miscellaneous** option on the left hand side of the record to open the **Company Account** view.
- Click in the **Account Code** field. A button appears on the right, click the button to open the **Specify Account Code** form.

A screen displaying account code maintenance is then displayed.

You can enter an account code in one of the following ways:

Enter an account code manually:

- Select **Edit Manually**.
- Enter an Account Code in the box.
- Click on the **Ok** button.

Link this Company to another Company record which you use for the invoicing address.

- Select **Link to Existing** or **New Invoice Address**.
- Enter the name of the Company into the Keyname field and click on the **Find** button.
- Select the **Company** by double clicking or clicking on the **OK** button.

Create a new Company record and account code if it is different to the Company that you are working in.

- Select **Link to Existing** or **New Invoice Address**.
- Enter the name of the Company into the Keyname field and click on the **New Invoice Address** button.
- Enter the company details.

If you want to allocate a code automatically, tick the **Allocate Automatically** box.

- Click on the **Ok** button.

Allocate an account code automatically:

- Select **Allocate Automatically**.
- Click on the **Ok** button.

If the account code already exists a warning appears with the name of the company already using that account code.

If you ticked the Invoice Address box, then this field is automatically completed. Otherwise it is filled with the address of the company when you create the account code.

Note: You have to complete the Account and Timesheet Contacts fields. Click in each field and select the appropriate name from the drop down list.

Click in the **Invoice Frequency** field and select an option from the drop down list.

Note: You also need to complete the following fields:

- Group Timesheets
- Their Ref
- Days Credit

See also
2.05 Add accounts details.

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