Surf Accounts for C&C Schools Quick Reference Guide

Updating the Chart of Accounts

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Outlined below are the steps on how to;

- 1: Create a new nominal account.
- 2: Remove a nominal account.
- 3: Change the description on a nominal account.



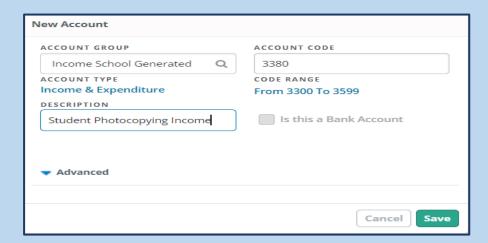
1. How to create a new nominal account

Instructions

- Go to General Ledger > Select Chart of Accounts
- Click on New icon
- Select the account group as indicated by the Type and Category on the Chart of Accounts Guideline
- Enter the relevant account code number
- Enter the description
- Select Save

Example

- New account: 3380 Student Photocopying Income
- Enter details on Surf Accounts as follows:
 - In Account Group select Income School Generated
 - ➤ In Account Code enter 3380
 - In Description type Student Photocopying Income
- Click Save





2 How to remove a nominal account

Instructions

- Go to General Ledger > Select Chart of Accounts
- Highlight the account row, click the More icon and select Delete.
- You will be asked to confirm that you want to remove the account code. You will not be able to delete an account code if there are transactions on the ledger. If this is the case, add **DO NOT USE** to the description of the account. See point 3 below on how to change the description.





3 How to change the description on the nominal account

Instructions

- Go to General Ledger > Select Chart of Accounts
- Highlight the account row, click the More icon and select Edit.
- Update the description. (Note you can also edit the nominal code numbers here if necessary)



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