

How to Add, Edit, or Delete the Chart of Accounts

Category: Chart of Accounts | Created: June 10, 2026 | Updated: September 01, 2026

How do I Add, Delete or Edit the Chart of Accounts?

Screen Location **Main Menu > Accounting > Chart of Accounts**



Chart of Accounts

Your new HaulWare database comes either with a standard Chart of Accounts which can be customized for your company or upon request we

can import your own existing. Open the Chart of Accounts menu item to edit or view.

Grp	Seq	Account	Sub	Account Description	Sub Acct Descr	Balance
		1000		Cash		\$0.00
		1001		Best Bet Checking		\$190,970.90
		1002		Chase Bank Checking		\$0.00
		1100		Undeposited Funds		\$114.94
		1200		Accounts Receivable		\$907,164.39
		1500		Driver Advances		\$3,552.99

Group Type	Group Name
☒ A	CURRENT ASSETS
☒ B	FIXED ASSETS
☒ C	OTHER ASSETS
☒ *	

1. Buttons.
2. New- Add a new account
3. Delete - Delete an existing account. Note - Only accounts that have not been used in a transaction can be deleted.
4. Find - Search for an existing account
5. Print - Print a listing of your existing accounts.
6. Edit - Edit and existing account.
7. Budget - The budget feature is currently under construction
8. Done - Close the Chart of Accounts window.
- 9.
10. Groups
11. Each Account type (Assets, Liability, Equity, Revenue, COGS, Expense, Other Revenue and Other Expense) has a grouping capability. This is optional. By assigning the accounts in each account type a group they will appear grouped and subtotaled together on either the Balance Sheet or Income Statement.

Update Chart of Accounts

Chart of Accounts Edit Dialog

Select Budget: 2015

Account Type: ☒ Active ☐ Protected

☒ Asset
 ☐ Equity
 ☐ COGS
 ☐ Other Rev
☐ Liability
 ☐ Revenue
 ☐ Expense
 ☐ Other Exp

Account: 1100 Account Description: Undeposited Funds

Sub Account: Sub Acct Description:

Group Type: Group Sequence:

Current Balance: \$114.94

Cancel OK

1. To Edit an existing account
2. Select the account you wish to edit by clicking on and highlighting the account. Select the Edit button
3. Active - Tells the system this is an active account that is available for use. Unchecking the Active flag will remove the account from drop down menus and prevent any transactions from posting to it.<
4. Protected - Checking the protected flag prevents the account from being selected manually in transactions except manual journal entries. Note - Accounts such as Accounts Receivable, Accounts Payable and Undeposited Funds are used by the system and commonly should be protected.
5. Account Type - Tells the system what type of account this is. Note - Account types cannot be changed after the account has been used in a transaction
6. Account: - Account number of parent account
7. Account Description: - Description of the account.
8. Sub Account: Account number of sub account
9. Sub Acct Description: - Description of sub account
10. Group Type - Indicates which group this account belongs to. Note - Grouping your accounts will group and subtotal them on your financial reports

11. Group Sequence - Indicates where within the group this account should be placed.
12. To Add a New Account
13. Select the New button



1. Select the Account Type
2. Select the Active flag
3. Optionally select the Protected flag
4. Enter the Account Number of the new account
5. Enter the Description of the new account
6. Optionally enter the Sub Account and Sub Account Description
7. Optionally enter the Group Type and Group Sequence
8. Select the OK button to save the record and close the screen

Your new account is now ready to use!

To Edit an existing Account

Chart of Accounts

Display ☒ By Acct ☐ By Group

Asset	Liability	Equity	Revenue	COGS	Expense	Other Rev	Other Exp
Grp	Seq	Account	Sub	Account Description	Sub Acct Descr	Balance	
		1000		Cash		\$0.00	
		1001		Best Bet Checking		\$190,970.90	
		1002		Chase Bank Checking		\$0.00	
		1100		Undeposited Funds		\$114.94	
		1200		Accounts Receivable		\$907,164.39	
		1500		Driver Advances		\$3,552.99	
		1800		Equipment		\$0.00	

General Ledger Report Groups (for the selected account type)

Group Type	Group Name
☒ A	CURRENT ASSETS
☒ B	FIXED ASSETS
☒ C	OTHER ASSETS
☒ *	

New Delete Find Print Edit Done

Highlight the Account you want to edit and select the Edit button

Monday, April 06, 2015

HaulWare Trucking, Inc.

Chart of Accounts

Display ☒ By Acct ☐ By Group

Asset	Liability	Equity	Revenue	COGS	Expense	Other Rev	Other Exp
Grp	Seq	Account	Sub	Account Description	Sub Acct Descr	Balance	
		1000		Cash			
		1001		Best Bet Checking			
		1002		Chase Bank Check			
		1100		Undeposited Funds			
		1200		Accounts Receivable			
		1500		Driver Advances			
		1800		Equipment			

General Ledger Report Groups (for the selected account type)

Group Type	Group Name
☒ A	C
☒ B	F
☒ C	C
☒ *	C

New Delete Find

Chart of Accounts Edit Dialog

Account Type ☒ Asset ☐ Equity ☐ COGS ☐ Other Rev ☐ Liability ☐ Revenue ☐ Expense ☐ Other Exp

☒ Active ☐ Protected

Account 1800 Account Description Trucks

Sub Account Sub Acct Description

Group Type Group Sequence

Current Balance \$0.00

Cancel OK

The account number, description, active, protected, grouping and sequencing can all be edited at anytime. The Account Type cannot be changed after the account is in use anywhere in the system

To Delete an account highlight the account and select the Delete button.