Mass Update Added for Custom Column Fields in Chart of Accounts

APTAWEB-3725

Introduction

A Mass Update for Chart of Accounts (COA) Custom Column Fields has been added to the Chart of Accounts screen. This will allow for easier implementation when clients want to add information in custom columns in the COA.

To access the Mass Update feature, go to Banking & COA, select Chart of Accounts. Select the account(s) that need to be updated and then click the More button and select "Mass Update".
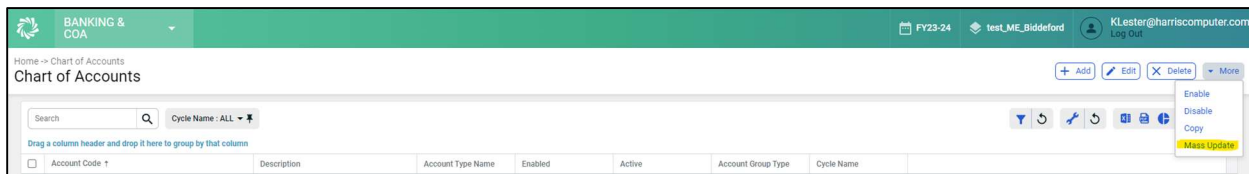

Figure 1: Chart of Accounts - Mass Update under the More Button

Currently only some state have the custom columns in the Chart of Accounts screen.

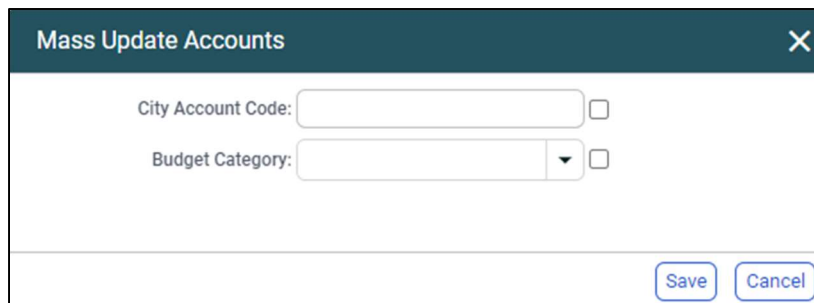Custom Columns for Maine: Budget Categories or City Codes (Biddeford & Dayton)

Figure 2: Maine Mass Update COA Custom Fields Pop-Up Screen

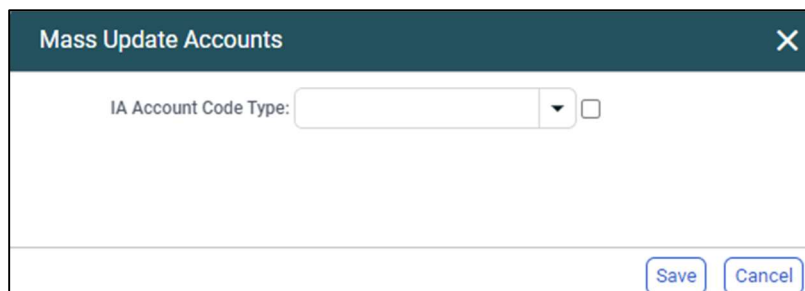Custom Columns for Iowa: IA Account Code Type

Figure 3: Iowa Mass Update COA Custom Fields Pop-Up Screen

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Custom Columns for Pennsylvania: AFR Account Object
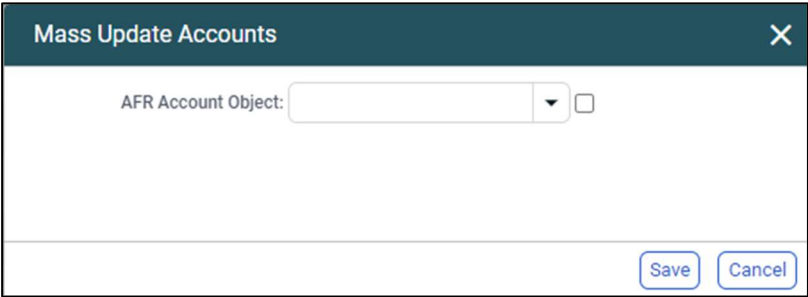

Figure 4: Pennsylvania Mass Update COA Custom Fields Pop-Up Screen
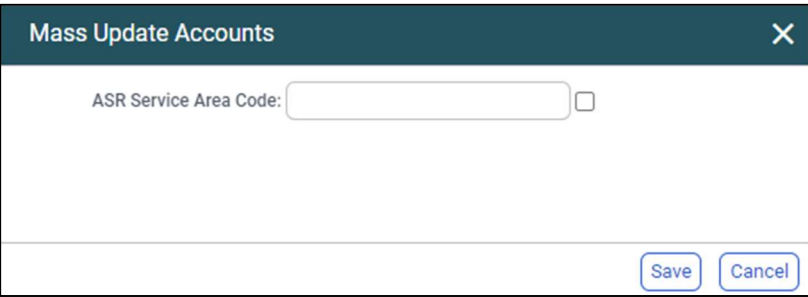
Custom Columns for Virginia: ASR Service Area Code

Figure 5: Virginia Mass Update COA Custom Fields Pop-Up Screen