



How To Import The Custom Chart Of Accounts

Step 1 : On The Main Window Screen

1. Select File
2. when the menu opens select New File
3. When the Hierarchy Setup Wizard Opens select cancel

Step 2: Importing The Chart Of Accounts

1. Select File
2. Scroll down and select Import
3. When the import menu opens select "Import Accounts from CSV"
4. On the Import Account Assistant window that opens, select **Next**.
5. On the Choose File to Import window, on the left hand-side select where on your computer is the file located, typically it will be your downloads folder, then select the Etsy import file CSV by clicking on it, and scroll down and select **Next**.
6. On the Import Accounts Preview window you should see the list you are importing select **Next** to continue.
7. On the Import Accounts Now window_ scroll down and select **Apply**.
8. On the New Book Options window that opens scroll down and select close.
9. Now you should be on the Import Summary screen, if everything was imported successfully you should see Import Completed Successfully on the screen and the number of accounts that were imported.
10. select close to closeout and finish up.



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Step 3 : Name and Save The File:

1. When the save as window opens on the left hand side, **select** where you want to save the file on your computer.

3 Scroll up to the name field text box and **enter a name** for the file

4. On the right-hand side click on the folder icon and **enter a name** for the folder

5. Scroll down and select **Save As**

Back on the main window you should see the new chart of accounts and the name of your new accounting file on the title bar