

Accounts – List View

Module: Accounting

Screen Type: List View

URL: `/^accounting/bank-accounts/`

Model: Account

Record Name: Account

Plural Name: Accounts

What This Screen Is For

TODO: Explain what this screen does in plain language.

What You See on This Screen

 *Add a screenshot of this screen.*

Fields on This Screen

| Field | Type | Description |
|------------------|----------------------------------|---|
| Last Modified At | Date & time | <i>TODO</i> |
| Last Modified By | Relationship (single) (optional) | <i>TODO</i> |
| Account Name | Text | <i>TODO</i> |
| Category | Relationship (single) | <i>TODO</i> |
| Balance Currency | Text (choice) (optional) | <i>TODO</i> |
| Balance | Number (decimal) (optional) | <i>TODO</i> |
| Account Number | Text (optional) | <i>TODO</i> |
| Header Account | Yes/No | If an account is defined as a Header Account, it will report the total balances of all accounts assigned to it. |

| Field | Type | Description |
|-------------------|--------------------------|---|
| Active | Yes/No | Uncheck this field to mark an account as inactive. Inactive accounts will not be presented for selection in various menus in the Brisk system |
| Additional Filter | Text (choice) (optional) | For reporting purposes, add a tag to this account to help it flow into the correct section on financial reports |

System Fields (Managed Automatically)

⚙️ These fields are managed by the system and usually do not need to be edited.

| Field | Type | Description |
|---------------|----------------------------------|-------------|
| Id | Auto number (ID) | <i>TODO</i> |
| Created At | Date & time | <i>TODO</i> |
| Created By | Relationship (single) (optional) | <i>TODO</i> |
| Custom Fields | Extra Fields JSONField | <i>TODO</i> |
| Deleted At | Date & time (optional) | <i>TODO</i> |

Common Tasks

- *TODO*

Tips & Helpful Hints

☐ *TODO*

Who Uses This Screen

- *TODO*

Related Screens

- **List View** — [accounting-accounts](#)
 - **Create View** — [accounting-accounts-create](#)
 - **Detail View** — [accounting-accounts-id](#)
 - **Update View** — [accounting-accounts-id-update-standard](#)
 - **Update View** — [accounting-accounts-id-update-header](#)
 - **Create View** — [accounting-bank-accounts-create](#)
 - **Detail View** — [accounting-bank-accounts-id](#)
 - **Update View** — [accounting-bank-accounts-id-update](#)
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Advanced Notes

TODO

Revision #1

Created 2026-01-09 03:12:38 UTC by Brisk

Updated 2026-01-09 03:12:38 UTC by Brisk