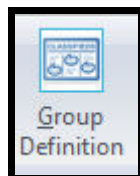


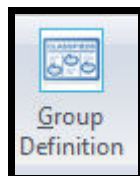


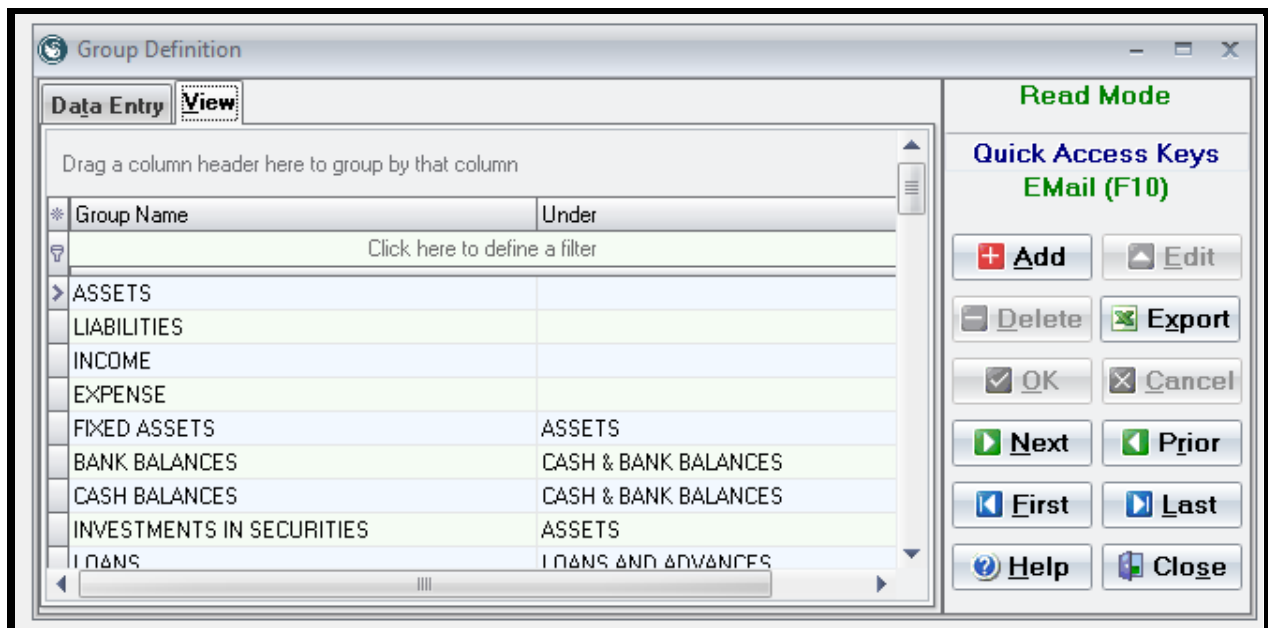
Group Definition (Alt + G)

Group definition module helps to create Account Group in the application apart from the defaults.

Default required groups are already created in the application, user can add new account group.



On clicking the  option or on pressing the shortcut (Alt + G), a popup will be displayed to user as shown below:



List of added groups will be displayed on the screen under view tab.

Shortcuts for any detail is displayed under the Quick Access Keys section in the top right corner of the screen, user can press the shortcut keys or can simply double click on the label.



User can perform below activities in Group Definition under configuration:

Add (Alt + A)

User needs to click on Add (Alt + A) button to add new account group. On clicking Add button, a popup will be displayed to user as shown below:

The screenshot shows a 'Group Definition' dialog box with a 'Data Entry' tab selected. It contains two mandatory dropdown fields: '* Group Name' and '* Under'. To the right is an 'Add Mode' panel with 'Quick Access Keys' (E-Mail (F10)) and a grid of buttons: Add, Edit, Delete, Export, OK, Cancel, Next, Prior, First, Last, Help, and Close.

User needs to add the group name user needs to create under respective head and click on Save (Alt + V) button to save the account group or can cancel the added group by clicking on Cancel (Alt +C) button.

Note: Field marked with * are mandatory fields.



Edit (Alt + E)

User needs to click on Edit (Alt + E) button to edit existing group. In which user can change the “Group Name” or “Under” or “Both”

User needs to update the account group details and click on OK (Alt + O) button to save the account group or can cancel the edited account group details by clicking on Cancel (Alt +C) button.

Note: User will not be able to edit default account groups added in the group definition.

Delete (Alt + D)

User needs to click on Delete (Alt + D) button to delete the existing account group.

On clicking the “Yes” button, the selected account group will be deleted form the list of groups and by clicking “No” it will get back to the previous tab.

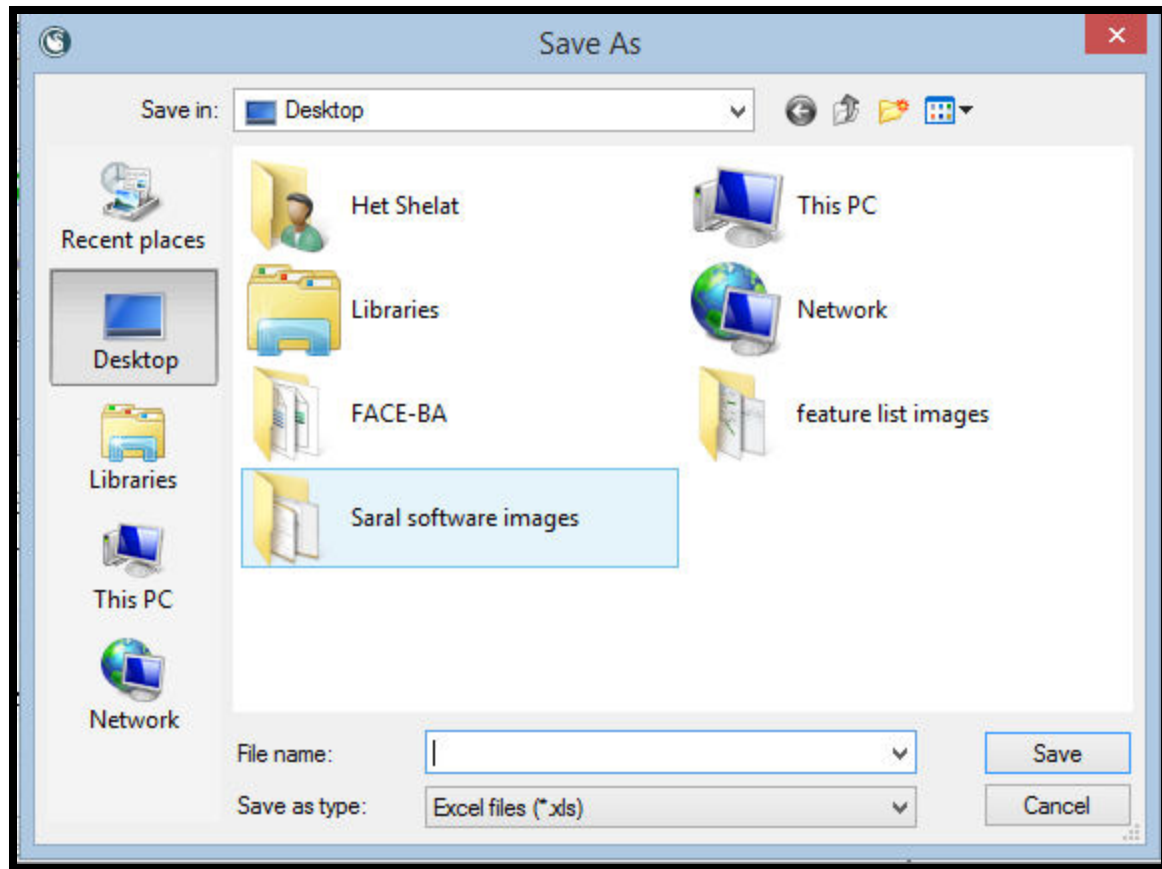
Note: User will not be able to delete default account groups added in the group definition.

Export (Alt + X)

User needs to click on Export (Alt + X) button under View Tab to export the list of added account groups. On clicking Export button, user will be asked for the path to export the spreadsheet of account group list as shown below:



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User needs to specify the path and click on save button to export the list successfully. Export can be done in .xls and .csv file.

[Next \(Alt + N\)](#)

On clicking the Next (Alt + N) button, user will be redirected to the next record in the list.

[Prior \(Alt + R\)](#)

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On clicking the Prior (Alt + R) button, user will be redirected to the previous record in the list.

[First \(Alt + F\)](#)

On clicking the First (Alt + F) button, user will be redirected to the first record in the list.

[Last \(Alt + L\)](#)

On clicking the Last (Alt + L) button, user will be redirected to the last record in the list.

[Close \(Alt + S\)](#)

On clicking the Close (Alt + S) button, group definition tab will get closed.

[Help \(Alt + H\)](#)

On clicking the Help (Alt + H) button, user will be redirected to help manual of Group Definition Tab