JurisBookkeeping
The Law Firm Bookkeepers

How-To Create Sub-Accounts in QuickBooks

Many of you know that I am a big proponent of using sub-accounts to make law firm financials more meaningful. For those of you DIY-ers who are doing their own bookkeeping out, here are straightforward instructions for how to make changes to your chart of accounts so that your financials will be more meaningful to you. Feel free to contact me at Annette@JurisBookkeeping.com if you have questions or need assistance. Happy bookkeeping!

QuickBooks Online Instructions

1. **To add a new parent account:**
   a. Go to the Chart of Accounts (Gear icon -> Settings -> Chart of Accounts)
   b. Select the "New" button
   c. Choose Category Type from the dropdown menu
   d. Enter name
   e. Press Save and Close

2. **To add a new sub-account:**
   a. Go to the Chart of Accounts (Gear icon -> Settings -> Chart of Accounts)
   b. Select the "New" button
   c. Choose Category Type from the dropdown menu
   d. Enter name
   e. Select the desired sub-account
   f. Press Save and Close

3. **To turn an existing account into a sub-account:**
   a. Go to the Chart of Accounts (Gear icon -> Settings -> Chart of Accounts)
   b. Highlight the account you want to change
   c. From the dropdown arrow on the far right, select Edit
   d. Place a check in the "Is sub-account" field
   e. Use the dropdown menu to select the desired parent account
   f. Press Save and Close

QuickBooks Desktop Instructions

1. **To add a new parent account:**
   a. Go to the Chart of Accounts (Home Page -> Chart of Accounts)
   b. From Account dropdown menu, select "New"
   c. Choose Account Type
   d. Press Continue
   e. Enter name
   f. Press Save and Close

2. To add a new sub-account:
   a. Go to the Chart of Accounts (Home Page -> Chart of Accounts)
   b. From Account dropdown menu, select "New"
   c. Choose Account Type
   d. Press Continue
   e. Enter name
   f. Place a check in the "Subaccount of" field
   g. Select parent account from dropdown menu
   h. Press Save and Close

3. To turn an existing account into a sub-account:
   a. Go to the Chart of Accounts (Home Page -> Chart of Accounts)
   b. Highlight the account you want to change
   c. From the Account dropdown menu, select "Edit Account"
   d. Place a check in the "Subaccount of" field
   e. Select parent account from dropdown menu
   f. Press Save and Close