

Adding a custom category to expenses or income [Redirected]

Last Modified on 03/29/2022 7:37 am MDT

How do I add a different category to Farmbrite Accounting?

You may want to add your own or another category to the accounting section. By default the categories in the accounting section of Farmbrite map to the US Schedule F for tax purposes. This is the reason the categories are very specific. You can change or add to them in a few different ways (depending on how you have your account set up).

1.) If you have your account set up as the default using the Schedule F* categories you can add a custom or other category in the list of categories. If you scroll down to the bottom of the list and you will find the "Other" category. You can use this to enter any category of Expense or Income in the Accounting section of Farmbrite that you would like. The nit will show on the bottom of your profit and loss under other.

The screenshot shows the 'New Transaction' form in Farmbrite. The form is set to create an 'Expense' transaction for \$0.00 on 11/4/2021. The reporting year is 2021. The payee is 'Example: Johnson Feed'. The category dropdown is highlighted with a red box, showing 'Other expenses' selected and 'Other' as an option. The 'Associate To' field is empty. The 'Check Number' is 'Optional'. The 'Keywords' field contains 'Example: Vet, Vaccinations, etc.'. The 'Description' field is empty. At the bottom right of the form are buttons for 'Close', 'Save & New', and 'Save Transaction'. The background dashboard shows a '2021 Summary' bar chart, a 'Transactions' table, and a 'P&L Statement' table.

2.) The second way you can change your categories is at the account level. You can do this by changing the categories in your account settings to be custom. Follow the instructions in the following section.

Changing the Categories on your Account Tab

* You can find the Accounting category option in your account settings on the Account tab of Farmbrite. Change this to custom by going to your Account page (top lefthand corner of your screen). Click on settings and then change the Accounting category from Schedule F to Custom. Then you will be able to add whatever categories you would like. (Please note: If you change this the categories will no longer map to the categories on your Schedule F used for US tax purposes.)



Search...

Account Kitty

- Schedule
- Tasks
- Livestock
- Crops
- Resources
- Accounting
- Market
- Contacts
- Farm Map
- Reports

Timezone: (GMT-07:00) Mountain Time (US & Canada)

Measurement System: US Customary

Accounting Categories: Schedule F

USDA Hardiness Zone: 8 Find your zone

Average Last Frost Date: August 15

Average First Frost Date: August 15

Tasks Statuses: To Do, In Progress, Completed

Default Task View: List

Product Categories: Leave blank for default categories or enter one category per line for your online store.

Account Currency: United States Dollar

Phone: (123) 867-5309



If you have more questions about this or need help. Please reach out to our customer success team at support@farmbrite.com