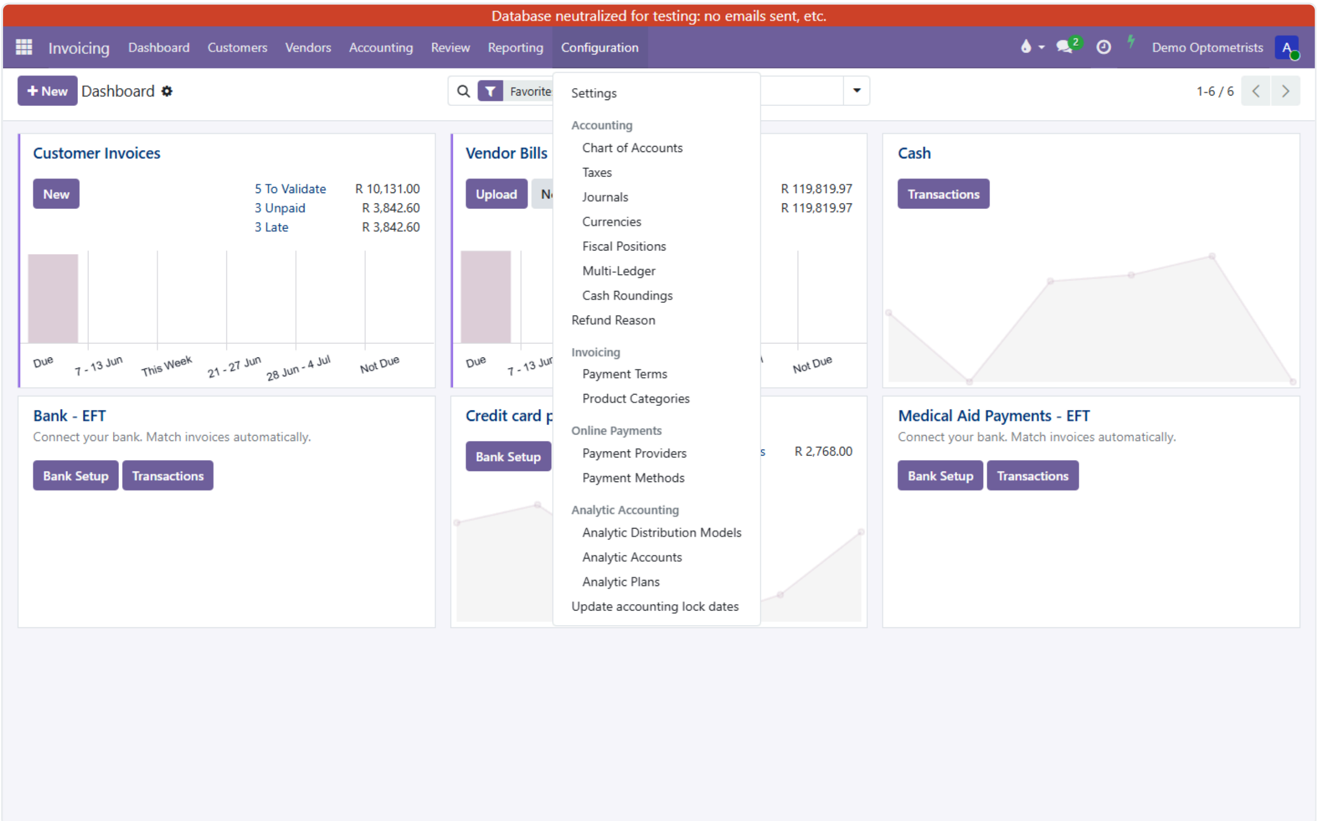
How to Add a Bank Journal to the Dashboard

This guide shows you how to add a bank account to your Accounting dashboard. Each account you add becomes its own **Bank journal** and appears as a card on the dashboard. Repeat the steps once for every account you want to add.

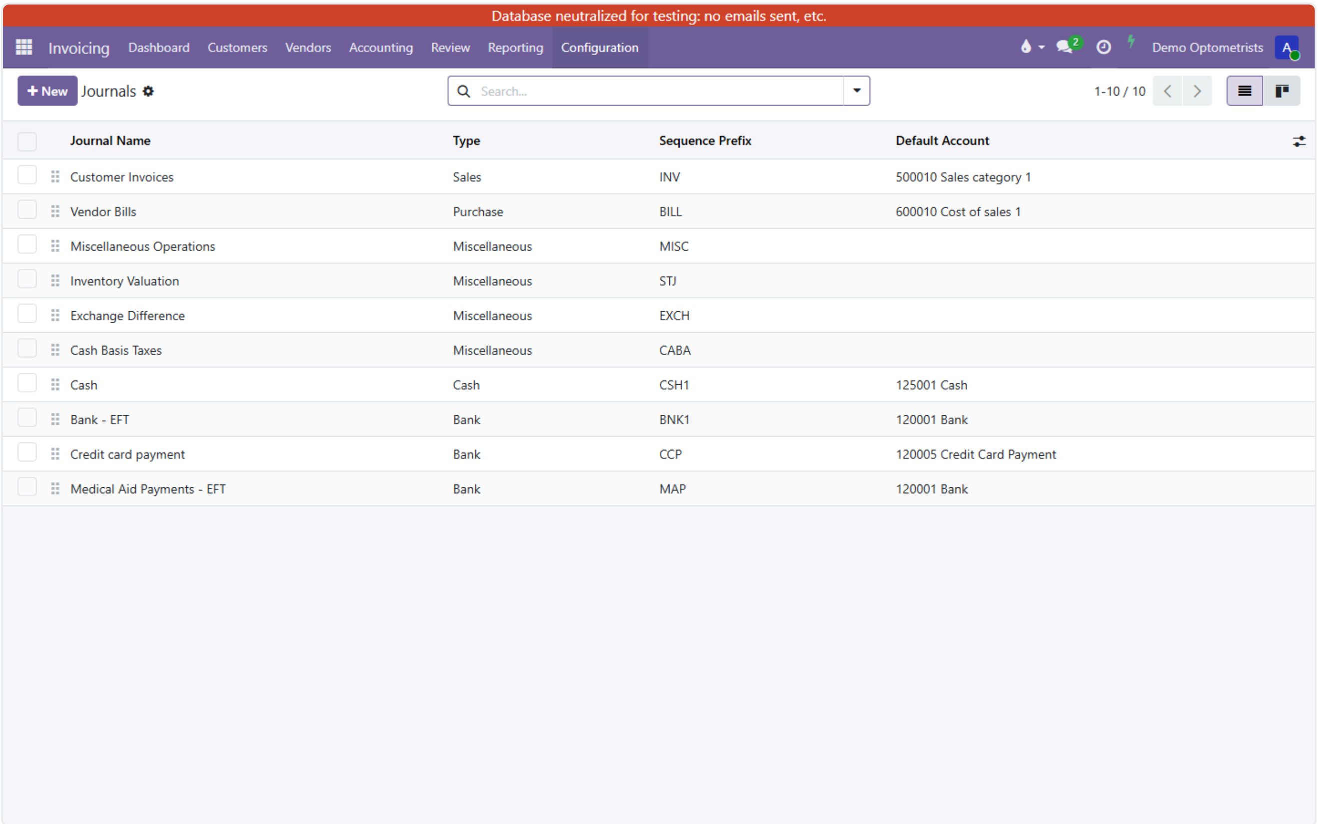
Step 1 — Open the Journals list

Go to **Accounting**, click **Configuration** in the top menu, then click **Journals**.



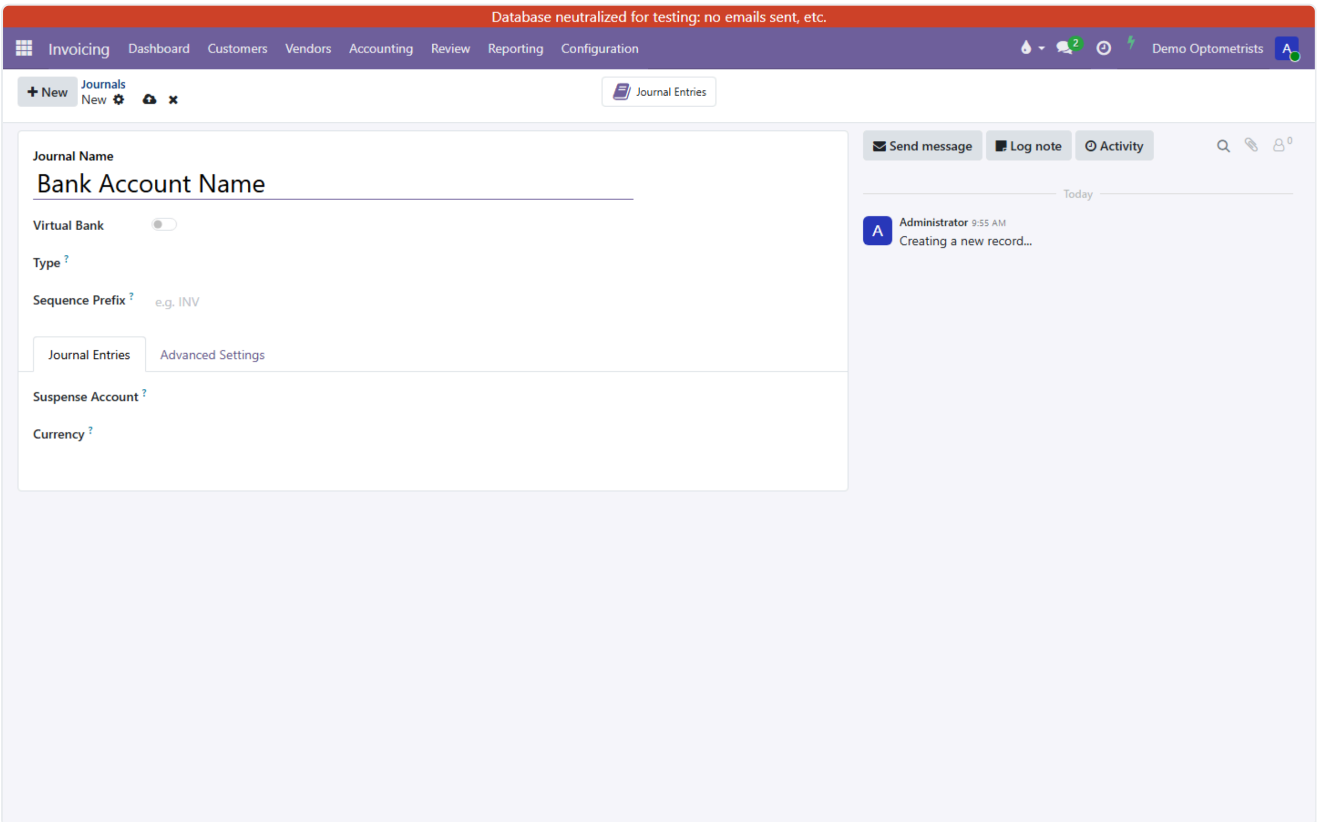
Step 2 — Start a new journal

Click the **New** button (top left).



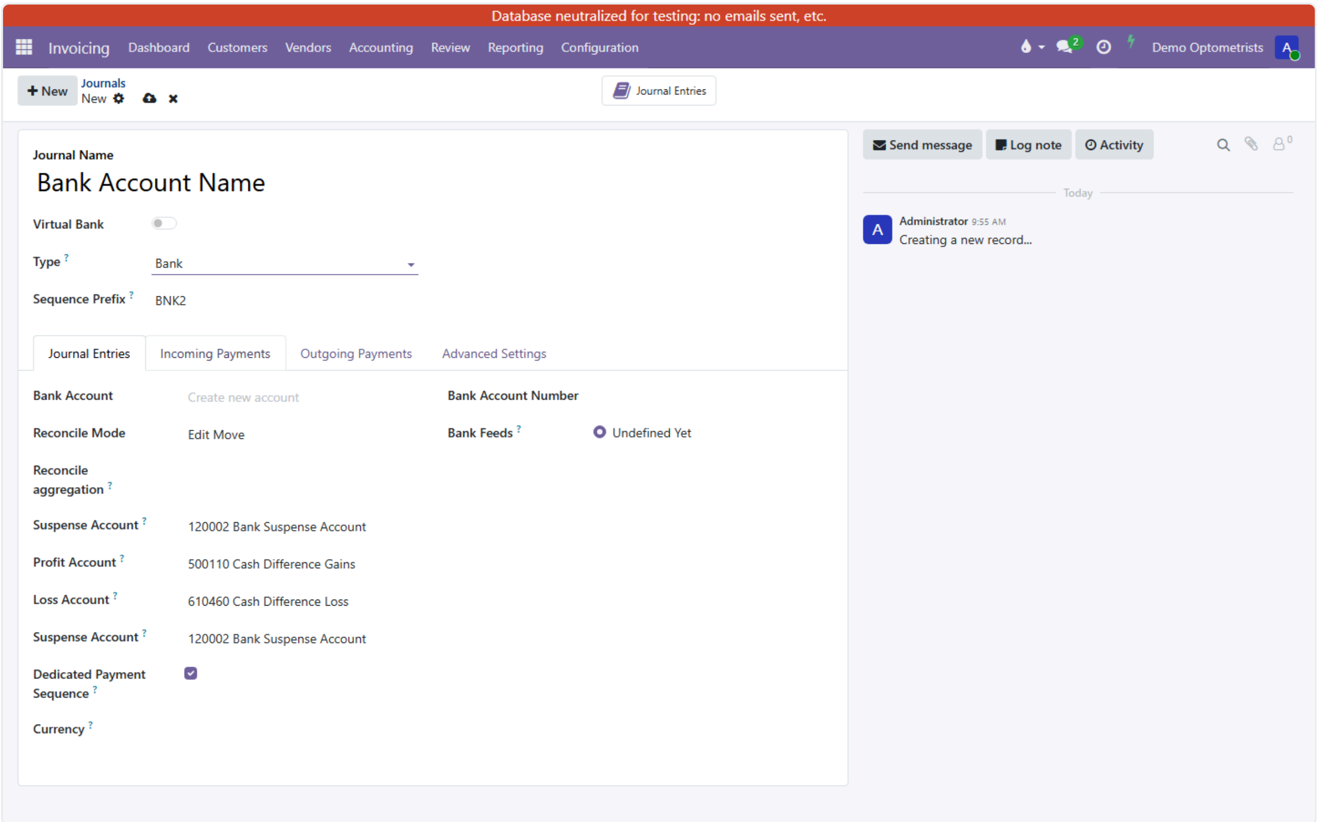
Step 3 — Fill in the Journal Name

Type a name for the account, for example the name of the bank or card it represents.



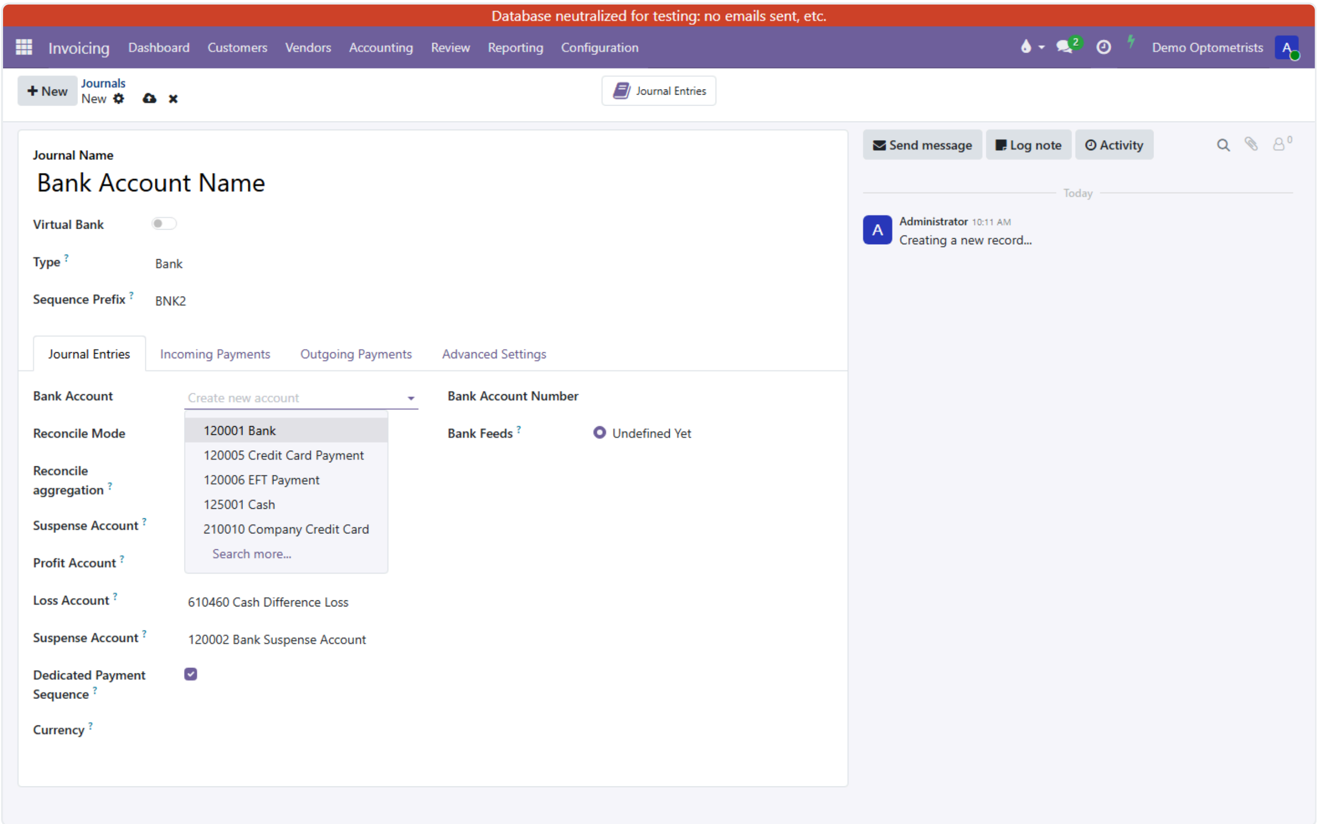
Step 4 — Choose the type

In the **Type** field, select **Bank**. A few extra fields appear once you do this.



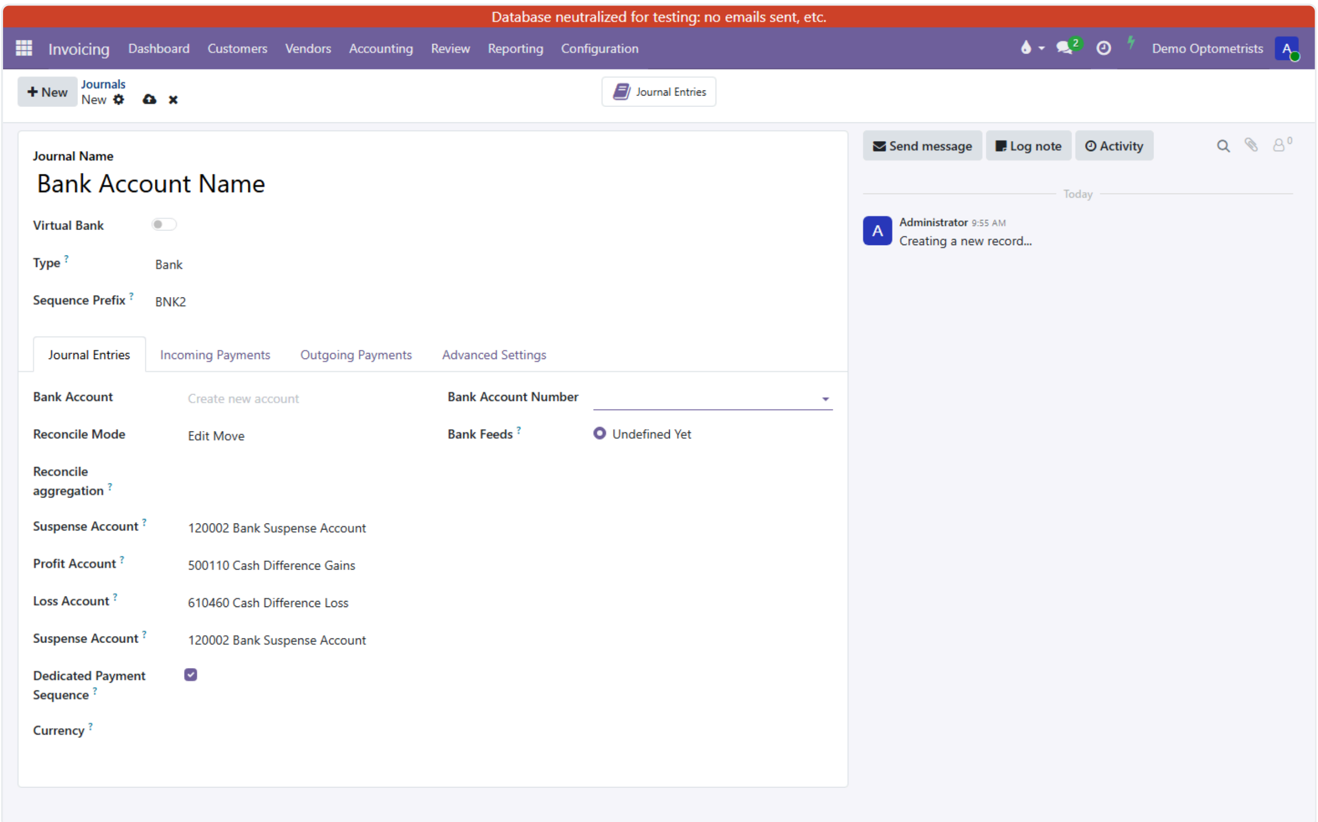
Step 5 — Set the Bank Account

On the **Journal Entries** tab, click the **Bank Account** field and select the matching account from the list (the account number and name, for example *8410.010 …*). Start typing the number to find it quickly.



Step 6 — Save

Click the **Save** button (the cloud icon at the top, next to the breadcrumb).



The new account now appears as a card on your Accounting dashboard.

Repeat for each account

Do steps 1–6 again for every account you want on the dashboard. Each one gets its own card once saved.

If anything looks different from these steps or you get stuck, send us a screenshot of the screen you are on and we will help.