How To Create A Fund In Finex

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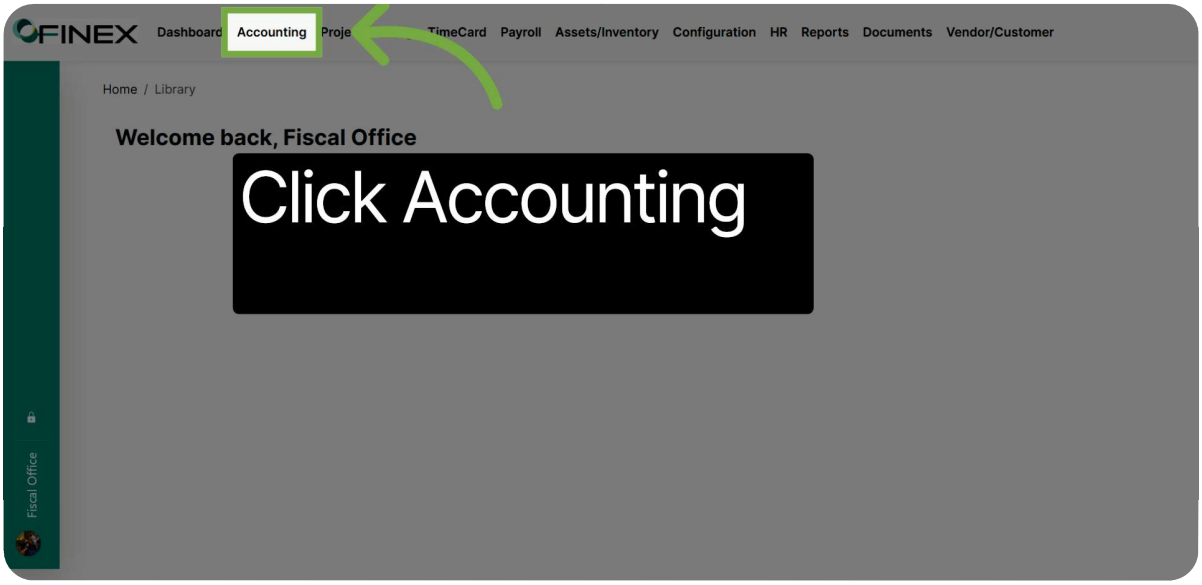
This tutorial guides you through creating a new Fund in Finex.

Go to www.finexweb.com

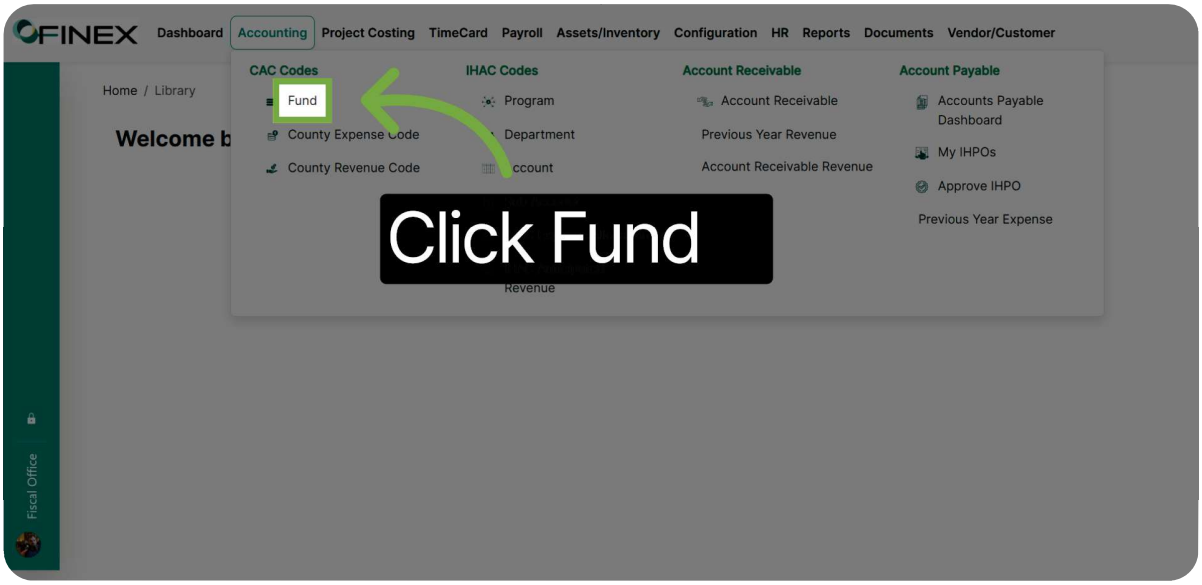
01 Navigate To Accounting

Click accounting to access the financial section of Finex.



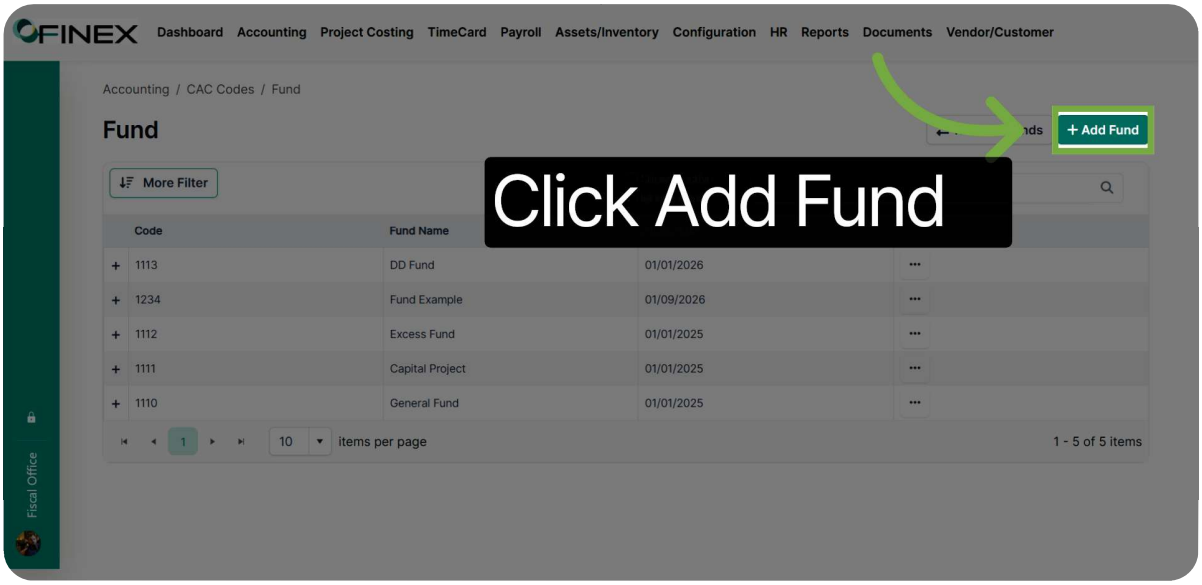
02 Open Fund Section

Click fund to access where you can manage and create Fund codes in Finex.



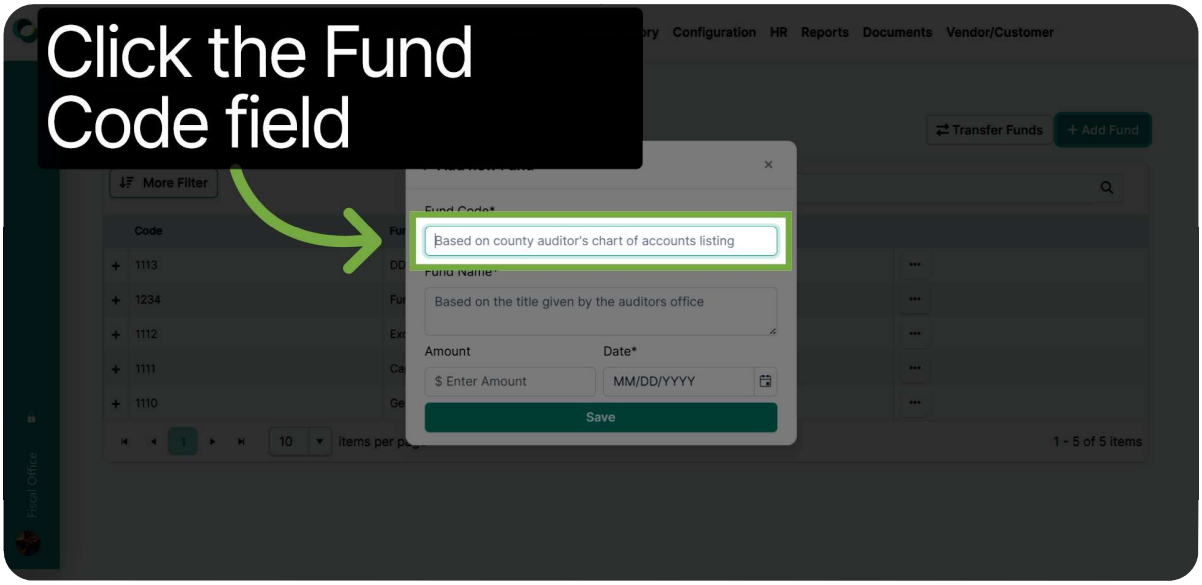
03 Initiate Add Fund Process

Click add fund to start creating a new Fund code.



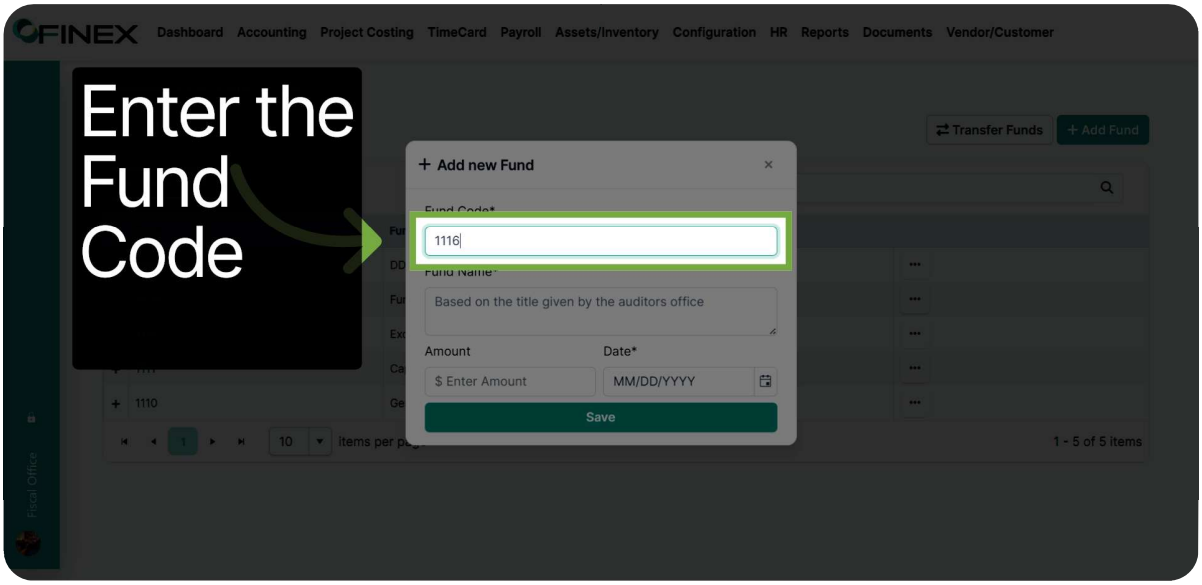
04 Select Fund Code Field

Click the Fund code field.



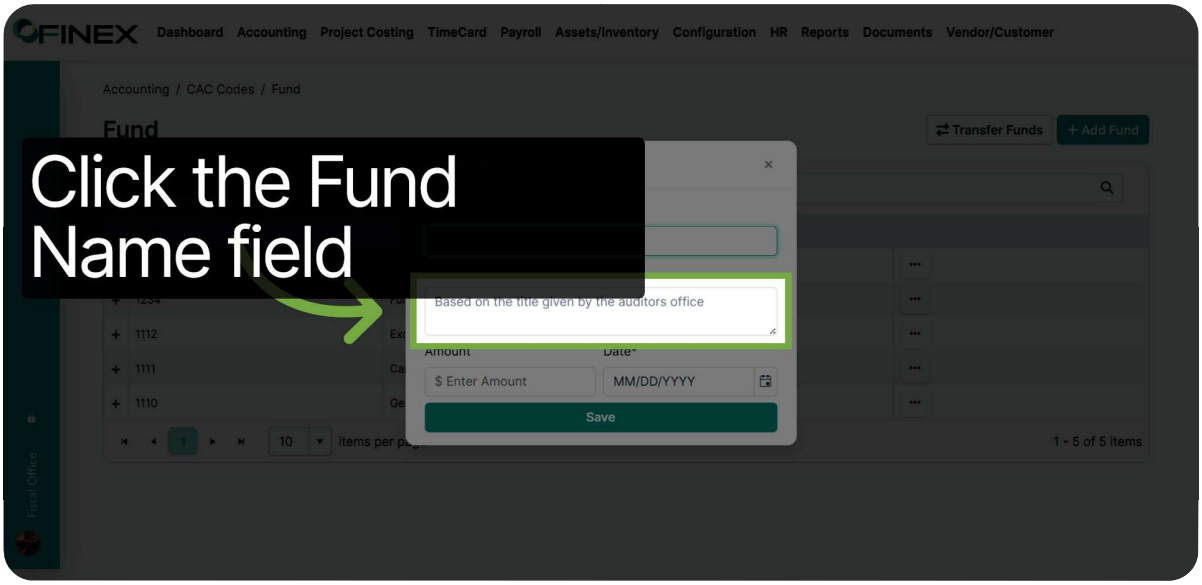
05 Enter Fund Code

Enter your Fund code.



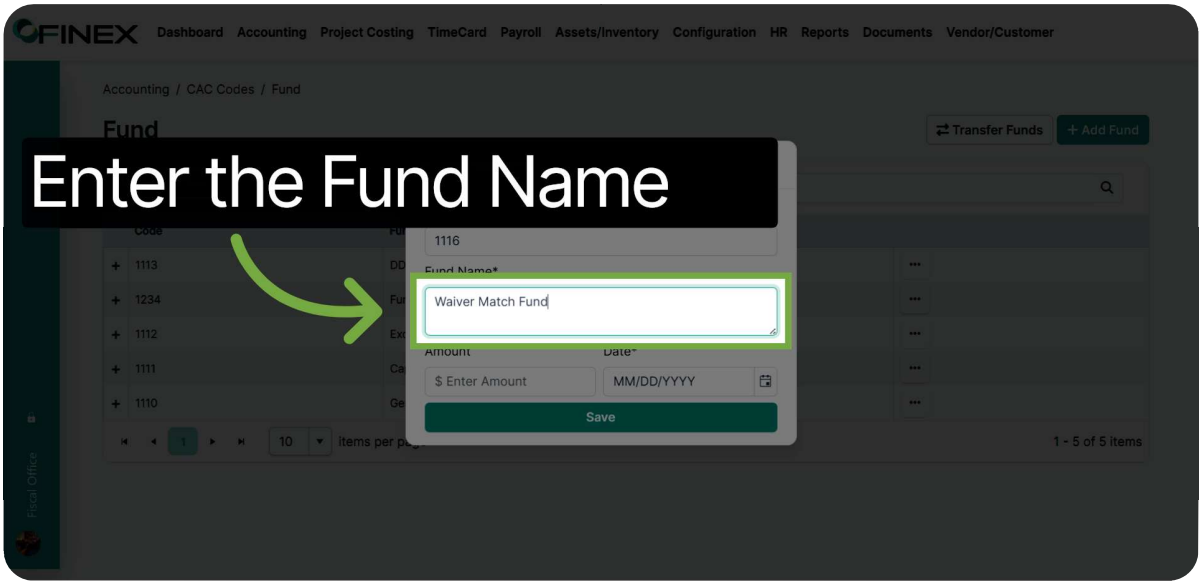
06 Select Fund Name Field

Click the Fund name field.



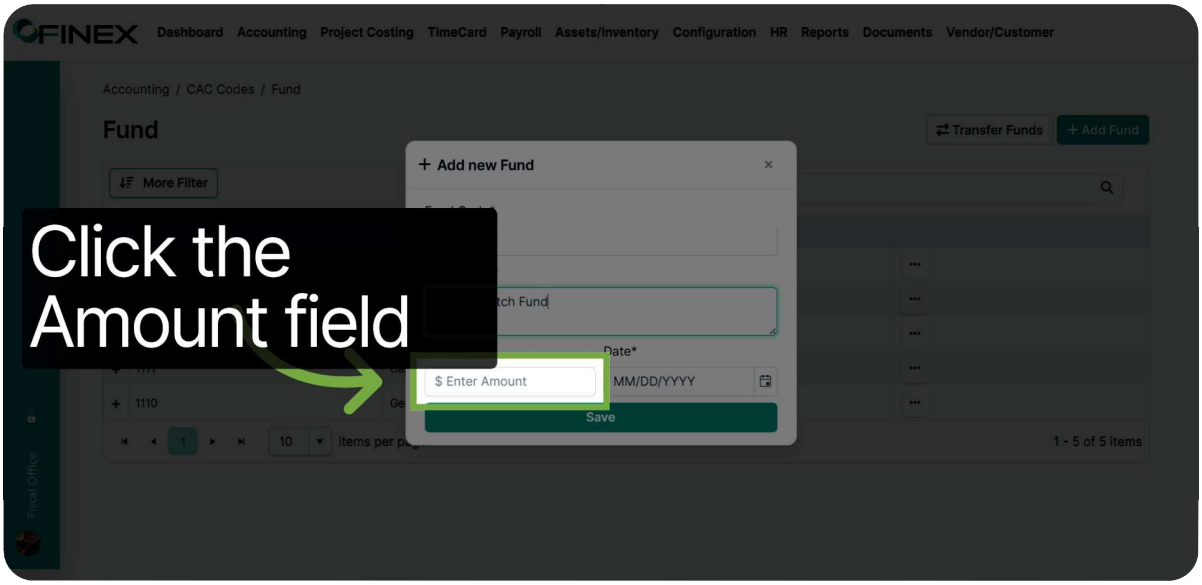
07 Enter Fund Name

Enter the name of your Fund.



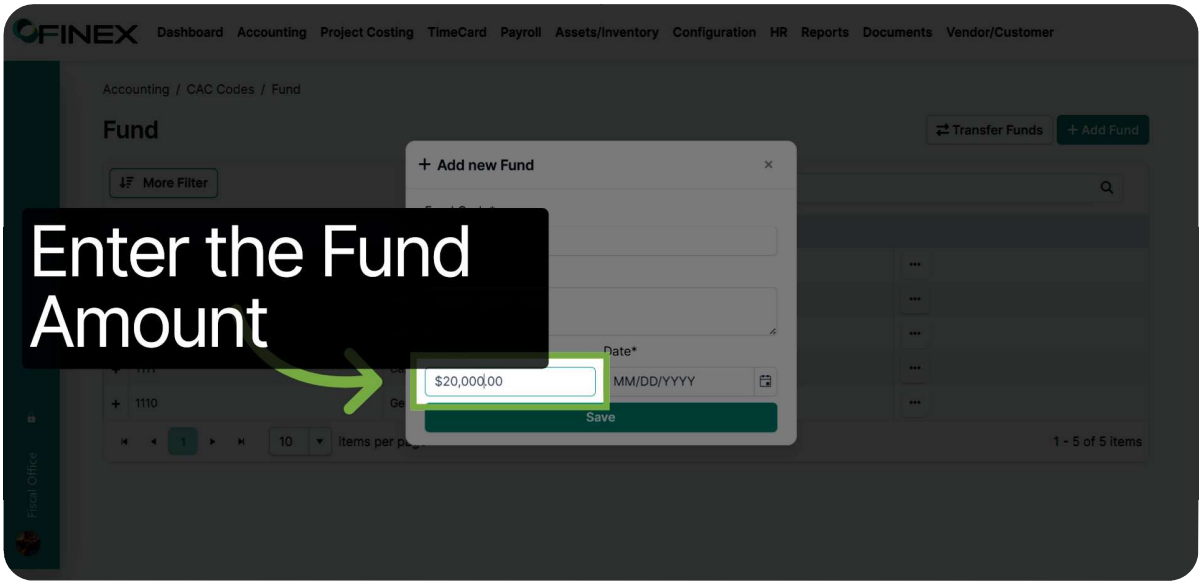
08 Select Amount Field

Click the amount field.



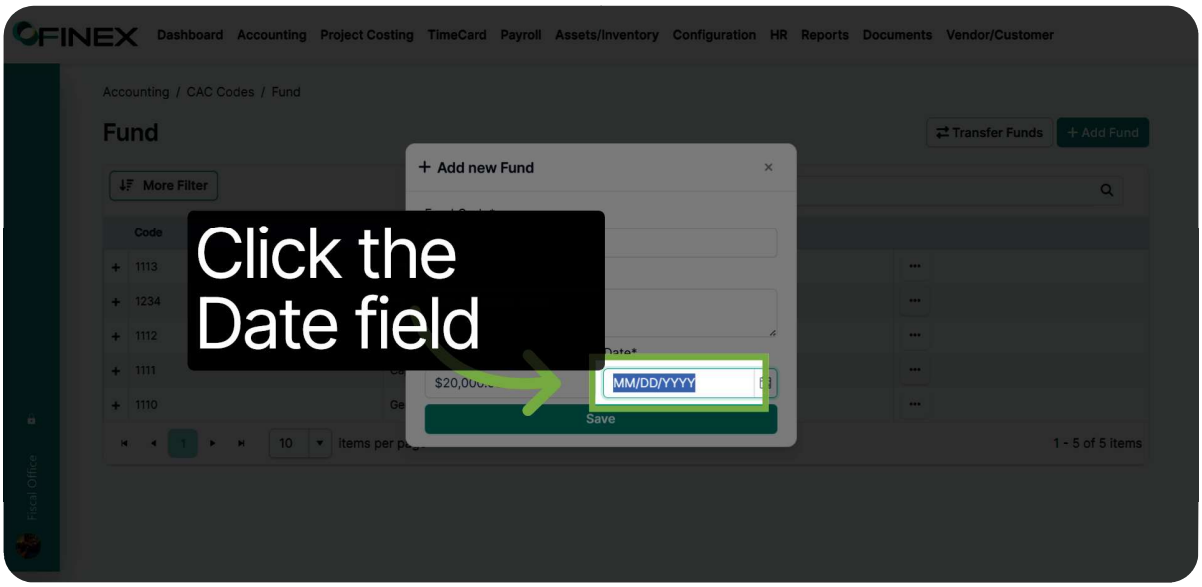
09 Enter Fund Amount

Enter the Fund amount.



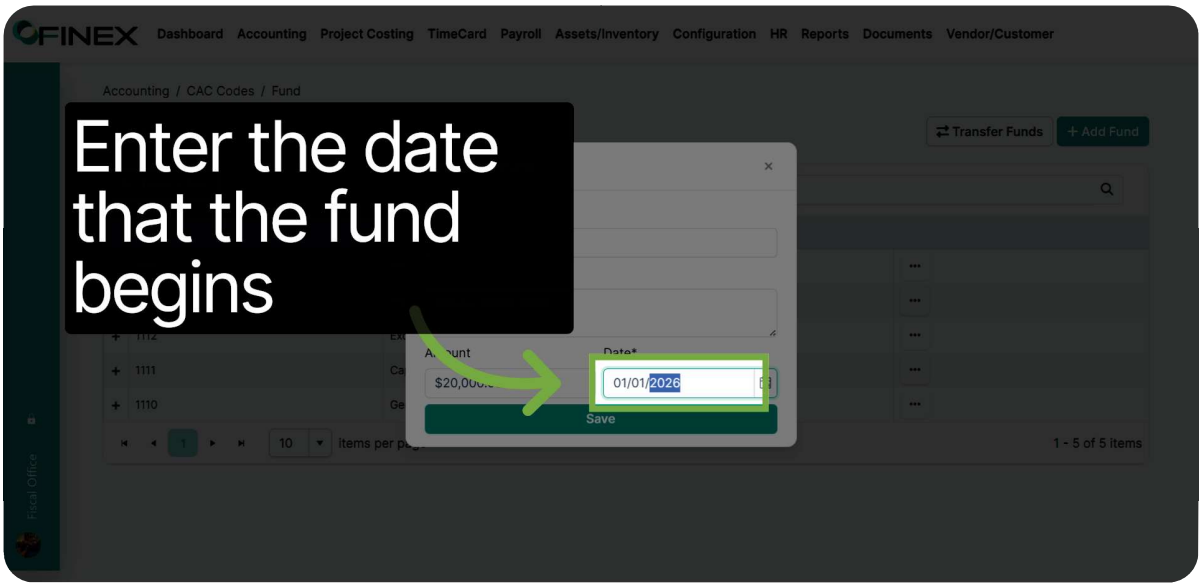
10 Select Date Field

Click the date field.



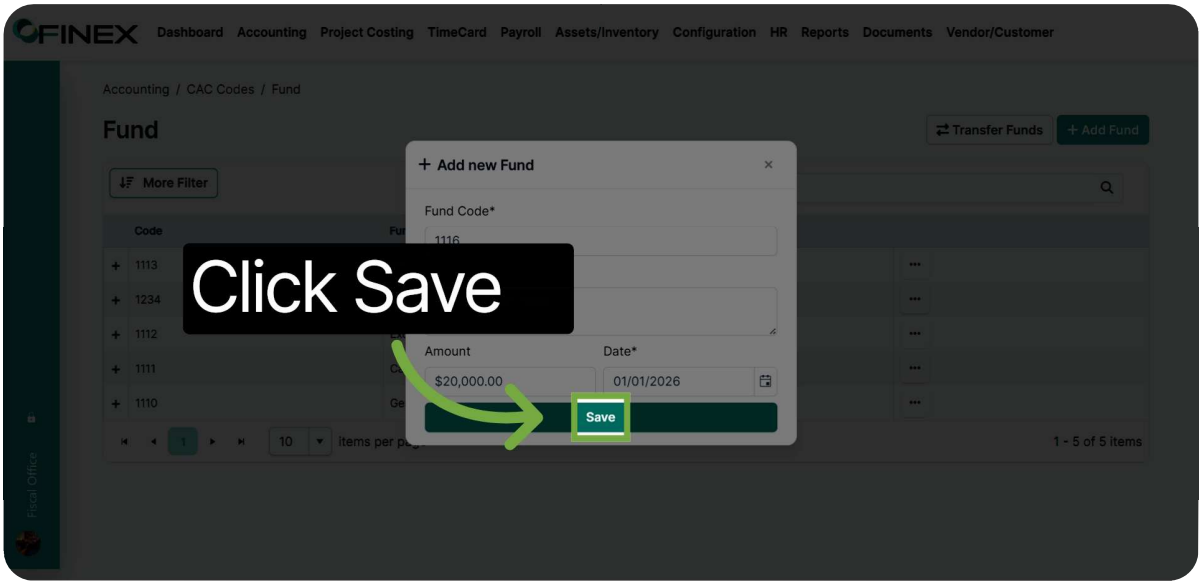
11 Enter Fund Date

Enter the date for your Fund. This date is typically January 1st of the first year that you're using the Fund.



12 Save New Fund

Click save to finalize your Fund code.



You have now successfully created a new Fund in Finex. You can utilize the Fund page to manage existing Funds or create additional Funds as needed.

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