

# Account Management

*Account Management allows the User to conduct all Account related functions. Almost all operations need to be linked to an Account.*

*Therefore in order to create a Sale/Lead, Expense, Campaign/Activity, Customer or Telemarketing script, an Account must 'current'.*

*This means the User must have selected this Account to work with either from a list of existing Accounts or by creating it prior.*

## 1. View all Accounts

By selecting the Account Management button, the User will be presented with a table of all Accounts and summary information.

This table will only display Accounts which the User has permissions to View.

### Note:

If access is needed for an Account that is not in this list, contact the application Administrator to change the Users privileges.

## 2. View all Accounts for a Contact

The User can view a summary of Accounts via the View Contact screen: Accounts tab - view all Accounts associated with a Contact

Refer [View a Contact](#) section.

## 3. Search for an Account

There are 2 methods to search for an Account. The first is on the Banner Section using the Global Search function. (see Global Search section)

The other method offers more fields and options to refine the search and can be accessed by selecting Account Management from the Menu Bar then selecting Search Accounts from the Left Menu Section.

The User can search for an Account or a list of Accounts by filtering on the following criteria:

Displays:

- Account number
- Account name
- City/Suburb
- Phone number
- Owner
- Status
- External. reference
- Industry

#### 4. Create an Account

If the User has Create Account privileges, then this option is available in the Left Hand Menu. If access is needed, contact the application Administrator to change the Users privileges.

All required fields are in **bold**

Field	Description
<b>Account</b>	Account or Company name
<b>Phone</b>	Phone number
Fax	Fax number
Website	website URL
ACN	Australian Company Number
ABN	Australian Business Number
<b>Owner</b>	Account manager or Sales person responsible for this account
Ext. Ref.	External reference number - could be internal accounting number
<b>Status</b>	Account status, either Active or Void
Industry	Industry sector, selectable from standard list
Other	Industry, if applicable sector not found in the list above

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Annual Revenue	Annual revenue of the company
No. of employees	Total number of employees of the company
<b>Mailing address</b>	
<b>Address 1</b>	Address line 1 - Street number and name
Address 2	Address line 2
Address 3	Address line 3
<b>City/Suburb</b>	City or town name
<b>State</b>	State or Province
<b>Postcode</b>	Postcode or Zipcode
<b>Country</b>	Country
<b>Billing address</b>	
Address 1	
Address 2	
Address 3	
City/Suburb	
State	
Postcode	
Country	

**Table 1:**

### 5. Add an Account Note

Notes can be used to store additional or background information. The User can create a Note by selecting the Add Note link in the Left Menu Section.

### 6. Delete an Account Note

This operation is only accessible from the View Account screen.

To perform this action:

- Select View Account function to access the tabs (below Account details).

- Select the Notes tab to access the operations View, Edit, and Delete.
- Select Delete.

### **7. View all Account Notes**

The User can view a summary of Accounts via the View Account screen: Notes tab - view all Notes associated with an Account

Refer [View an Account](#) section.

### **8. Add an Account Attachment**

Attachment can be used to store large amounts of information. The User can create an Attachment by selecting the Add Attachment link in the Left Menu Section.

### **9. View an Account Attachment**

This operation is only accessible from the View Account screen.

To perform this action:

- Select View Account function to access the tabs (below Account details).
- Select the Attachments tab to access the operations View, Edit, and Delete.
- Select View or the Created Date.

### **10. Edit an Account Attachment**

This operation is only accessible from the View Account screen.

To perform this action:

- Select View Account function to access the tabs (below Account details).
- Select the Attachments tab to access the operations View, Edit, and Delete.
- Select Edit.

### **11. Delete an Account Attachment**

This operation is only accessible from the View Account screen.

To perform this action:

- Select View Account function to access the tabs (below Account details).
- Select the Attachments tab to access the operations View, Edit, and Delete.
- Select Delete.

### **12. Select an Account**

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By selecting an Account, the User makes this Account current. This means all subsequent operations will be associated with this Account.

There are a number of ways of selecting an Account:

Almost all other Main Menu actions require the User to select an Account to work with. In instances where no Account is current and a Main Menu action has been selected, the User will be presented with an Account list from which to make a selection.

The User can also select the Account Management menu action and select an Account from the list.

Finally, a User can select (click) any Account Name link (where Account Name is underlined).

### **13. Change an Account**

A User can change the Account they are working with by selecting the Change Account link in the Menu Bar.

The User can also select the Account Management menu action and select an Account from the list.

Finally, a User can select (click) any Account Name link (where Account Name is underlined).

### **14. View an Account**

Account details can be displayed by selecting (clicking) Account name link (where Account name is underlined) which is available on most screens or by making a selection from the View All Accounts table (displayed when Account Management action is selected).

Depending on the Users privileges, some Accounts may not be visible. If access is needed, contact the application Administrator to change the Users privileges.

All Account details are displayed along with a number of tabs at the bottom. These tabs provide summary information in relation to the Account. The tabs are:

#### **14.1. Campaigns tab**

Campaigns tab - view all Campaigns for an Account

Displays:

- Campaign No.

- Campaign
- Account
- Status
- Start Date
- End Date

### **14.2. Activities tab**

Activities tab - view all Activities for an Account

Displays:

- Activity No.
- Activity
- Campaign
- Account
- Status
- Step
- Start Date
- End Date

### **14.3. Customers Lists tab**

Customers Lists tab - view all Customers Lists for an Account

Displays:

- List Name
- Description
- List Source
- Customers in List

### **14.4. Telemarkets tab**

Telemarkets tab - view all Telemarkets for an Account

Displays:

- Telemarket
- Description
- Status
- Step

### **14.5. Contacts tab**

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Contacts tab - view all Contacts for an Account

Displays:

- Full name
- Job title
- Work phone number
- email address
- Primary contact indicator

### **14.6. Sales tab**

Sales tab - view all Sales/Leads for an Account

Displays:

- Sales ID
- Account Name
- Product name
- Sale Amount
- Sale status
- Sale Probability
- Last contact date

### **14.7. Expenses tab**

Expenses tab - view all Expenses for an Account

Displays:

- Amount
- Invoice number
- Description
- Reimbursed indicator
- Budget centre

### **14.8. Notes tab**

Notes tab - view all Notes for an Account

Displays:

- Date Note was created
- Date Note was updated
- Short description

- View/Edit/Delete operations

## 14.9. Attachments tab

Attachments tab - view all Attachments for an Account

Displays:

- Date Attachment was created
- Date Attachment was updated
- Filename
- Short description
- View/Edit/Delete operations

## 15. Edit an Account

This function is accessible from the Left Menu Section. It allows the User to change and update any Account details.

**Note:**

Depending on the Users privileges, this function may not be available. If access is needed, contact the application Administrator to change the Users privileges.

## 16. Delete an Account

**Note:**

USE THIS FUNCTION WITH CAUTION. Accounts can be deleted but this has the affect of deleting ALL related Sales/Leads, Campaigns, Expenses etc. It would be an extreme case where an Account would be deleted, and if in doubt, use Edit Account to change the account status to Void. THIS ACTION CANNOT BE UNDONE.

**Note:**

Depending on the Users privileges, this function may not be available. If access is needed, contact the application Administrator to change the Users privileges.

## 17. Create a Campaign (Campaign Management or Call Centre modules)

Create a Campaign for this Account.

Refer - [Create Campaign](#) section.

**Note:**

Depending on the Users privileges, this function may not be available. If access is needed, contact the application Administrator to change the Users privileges.

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### 18. Create an Activity (Campaign Management or Call Centre modules)

Create an Activity for this Account.

Refer - [Create Activity](#) section.

**Note:**

Depending on the Users privileges, this function may not be available. If access is needed, contact the application Administrator to change the Users privileges.

### 19. Create a Contact (Sales Force module)

Create a Contact for this Account.

Refer - [Create Contact](#) section.

**Note:**

Depending on the Users privileges, this function may not be available. If access is needed, contact the application Administrator to change the Users privileges.

### 20. Create a Sale/Lead (Sales Force module)

Create a Sale/Lead for this Account.

Refer - [Create Sale](#) section.

**Note:**

Depending on the Users privileges, this function may not be available. If access is needed, contact the application Administrator to change the Users privileges.

### 21. Create an Expense (Sales Force module)

Expenses can be created at Account level but must be assigned to a Sale/Lead. This means there must be at least one Sales/Lead created prior. Refer Create Sale/Lead section.

When creating an Expense, the User is presented with a list of Sales/Leads to choose from

Refer - [Create Expense](#) section.

**Note:**

Depending on the Users privileges, this function may not be available. If access is needed, contact the application Administrator to change the Users privileges.

## 22. Create a Customer (Sales Force module)

Create a Customer for this Account.

Refer - [Create Customer](#) section.

**Note:**

Depending on the Users privileges, this function may not be available. If access is needed, contact the application Administrator to change the Users privileges.

## 23. Create a Case (Call Centre module)

Create a Case for this Account.

Refer - [Create Case](#) section.

**Note:**

Depending on the Users privileges, this function may not be available. If access is needed, contact the application Administrator to change the Users privileges.

## 24. Create a Telemarket (Call Centre module)

Create a Telemarket for this Account.

Refer - [Create Telemarket](#) section.

**Note:**

Depending on the Users privileges, this function may not be available. If access is needed, contact the application Administrator to change the Users privileges.