

How to Create Accounts and Contacts

Description

Use this function to enter and maintain Accounts and Contacts with whom you may work. An Account is the organization to which your contacts belong. You will need to create an Account before you can begin to enter Contacts related to the Account.

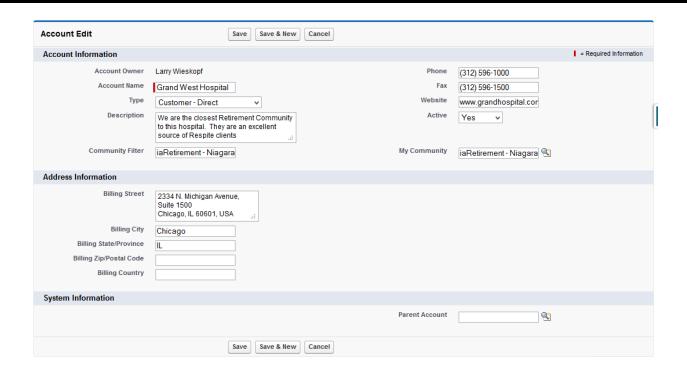
Step by Step

Create the Account

- Navigate to the Accounts tab
- Click New
- 3 Enter the Account Name
- 4 Select the **Type** of Account
- 5 Enter an optional **Description**
- **6** Enter a **Phone** number
- 7 Enter a Fax number
- **8** Enter a **Website** address
- **9** Select *Yes* or *No* to indicate whether the Account is **Active**
- 10 Specify Community
- II Enter an Address
- 12 Click Save



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Create the Contact

- Navigate to the Contacts tab
- 2 Click New
- 3 Enter a First Name
- 4 Enter a Last Name
- 5 Enter a Title
- 6 Specify an Account
- Select a Type
- Specify Community
- Select an Analysis Category
- **10** Enter a **Phone** number
- II Enter a **Mobile** number
- **12** Enter an **Email** address
- 13 Click Save



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Contact Information			
Contact Owner	Larry Wieskopf [Change]	Phone	(312) 596-1000
Name	Mr. Tim Barr	Mobile	(312) 596-1230
Title	Sr. Discharge Planner	Email	barr_tim@grandhosptials.com
Account Name	Grand West Hospital	Community	
Туре	Discharge Planner	Ranking	
My Community	iaRetirement - GTA		
Community Filter	iaRetirement - GTA		
Analysis Category			
Interested Technologies			
AccountCommunity	iaRetirement - Niagara		
ddress			
Mailing City		Other Street	
Mailing Street		Other City	
Mailing State/Province		Other State/Province	
Mailing Zip/Postal Code		Other Zip/Postal Code	
Mailing Country		Other Country	
Communication			
Fax	(312) 596-1500	Birthdate	6/25/1944
Home Phone		Department	Finance
Other Phone		Last Stay-in-Touch Request Date	
Assistant		Last Stay-in-Touch Save Date	



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