

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

- 1** Navigate to the Accounts tab
- 2** 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**
- 11** Enter an **Address**
- 12** Click **Save**

Account Edit Save Save & New Cancel

Account Information ! = Required Information

Account Owner	Larry Wieskopf	Phone	<input type="text" value="(312) 596-1000"/>
Account Name	<input type="text" value="Grand West Hospital"/>	Fax	<input type="text" value="(312) 596-1500"/>
Type	<input type="text" value="Customer - Direct"/>	Website	<input type="text" value="www.grandhospital.com"/>
Description	<input type="text" value="We are the closest Retirement Community to this hospital. They are an excellent source of Respite clients"/>	Active	<input type="text" value="Yes"/>
Community Filter	<input type="text" value="iaRetirement - Niagara"/>	My Community	<input type="text" value="iaRetirement - Niagara"/>

Address Information

Billing Street	<input type="text" value="2334 N. Michigan Avenue, Suite 1500 Chicago, IL 60601, USA"/>
Billing City	<input type="text" value="Chicago"/>
Billing State/Province	<input type="text" value="IL"/>
Billing Zip/Postal Code	<input type="text"/>
Billing Country	<input type="text"/>

System Information

Parent Account

Save Save & New Cancel

Create the Contact

- 1** 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**
- 7** Select a **Type**
- 8** Specify **Community**
- 9** Select an **Analysis Category**
- 10** Enter a **Phone** number
- 11** Enter a **Mobile** number
- 12** Enter an **Email** address
- 13** Click **Save**

▼ 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@grandhospitals.com
Account Name	Grand West Hospital	Community	
Type	<input checked="" type="radio"/> Discharge Planner	Ranking	
My Community	iaRetirement - GTA		
Community Filter	iaRetirement - GTA		
Analysis Category			
Interested Technologies			
AccountCommunity	iaRetirement - Niagara		

▼ Address

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	
Asst. Phone			

