

Account managers

September 10, 2026

Account managers

Account managers overview

The Account managers reference screen is the place to review the people listed as account managers and maintain that list. Use it when you need to add an account manager, assign account ownership, remove an account manager, or export the list.

Account ownership identifies the account manager who owns the selected account.

If you need to...	Go to
Review the list and its headers	Find and review account managers
Add a person to the list	Add an account manager
Assign account ownership	Assign account ownership
Remove a person or export the list	Remove or export account managers
Resolve a message	When an account-manager action does not work

Start with [Before you start](#) to check the conditions for the work you need to do.

Before you start

The list uses your available list layout for its data headers. The actions available to you also depend on your permissions and on the state of the selected row.

An account owner is a user who can assign account ownership.

Before you start	What must be true
List layout	An available list layout supplies the data columns.

Before you start	What must be true
Add	Your account has permission to add an account manager.
Ownership	You are an account owner, and the selected row is not already an account owner.
Remove	The selected row is not already an account owner.
Export	Your account has export permission.

When these conditions are in place, [find and review account managers](#).

Find and review account managers

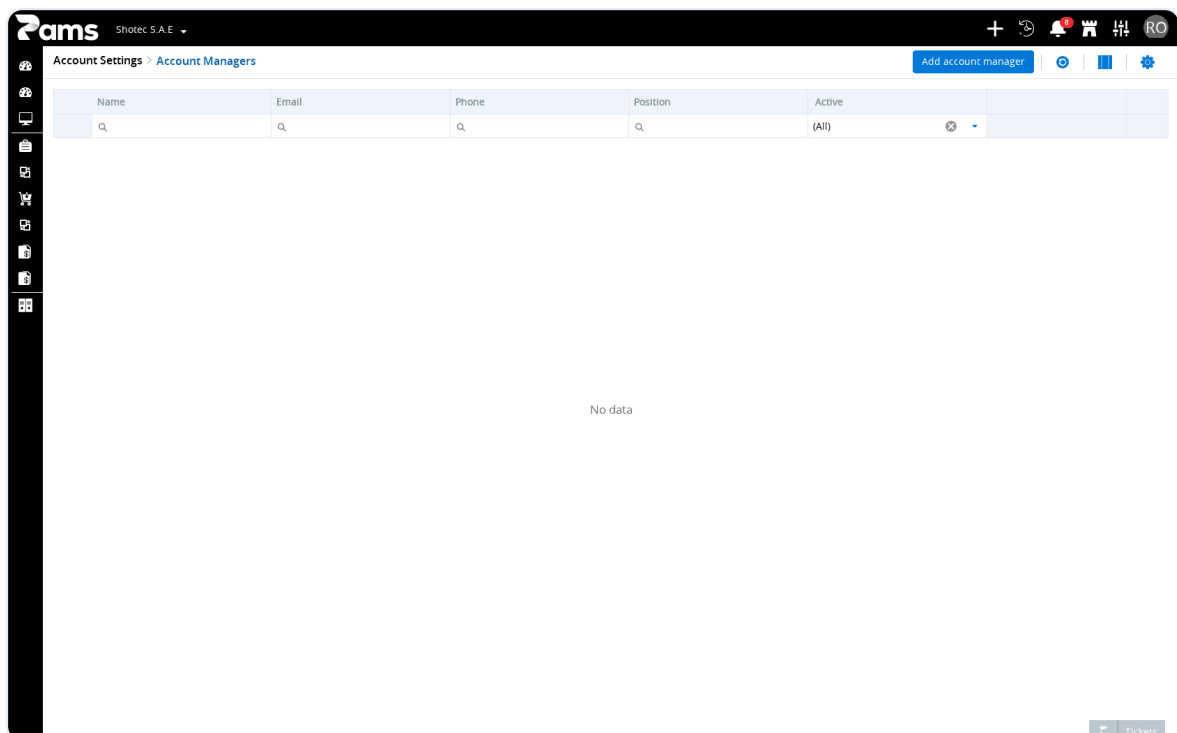
Review the grid headers and account-manager rows.

Prerequisites

- You can open the account-manager page.

Steps

1. Open the account-manager page.
2. Read the headers shown in the grid.



The current list shows these headers:

Header	What it identifies
Name	The account manager's name.
Email	The account manager's email.
Phone	The account manager's phone number.
Position	The account manager's position.
Active	Whether the account manager is active.

The header also contains **Add account manager** and icon-only controls titled **Refresh**, **Table Layout**, and **Settings**. When the list has no rows, it shows **No data**.

Result: The account-manager list is open, and you can see the headers and available header controls.

Use [Understand the account-manager screen](#) to review the list's areas and available actions.

Understand the account-manager screen

The screen combines a list of account managers with actions for maintaining the list. The data

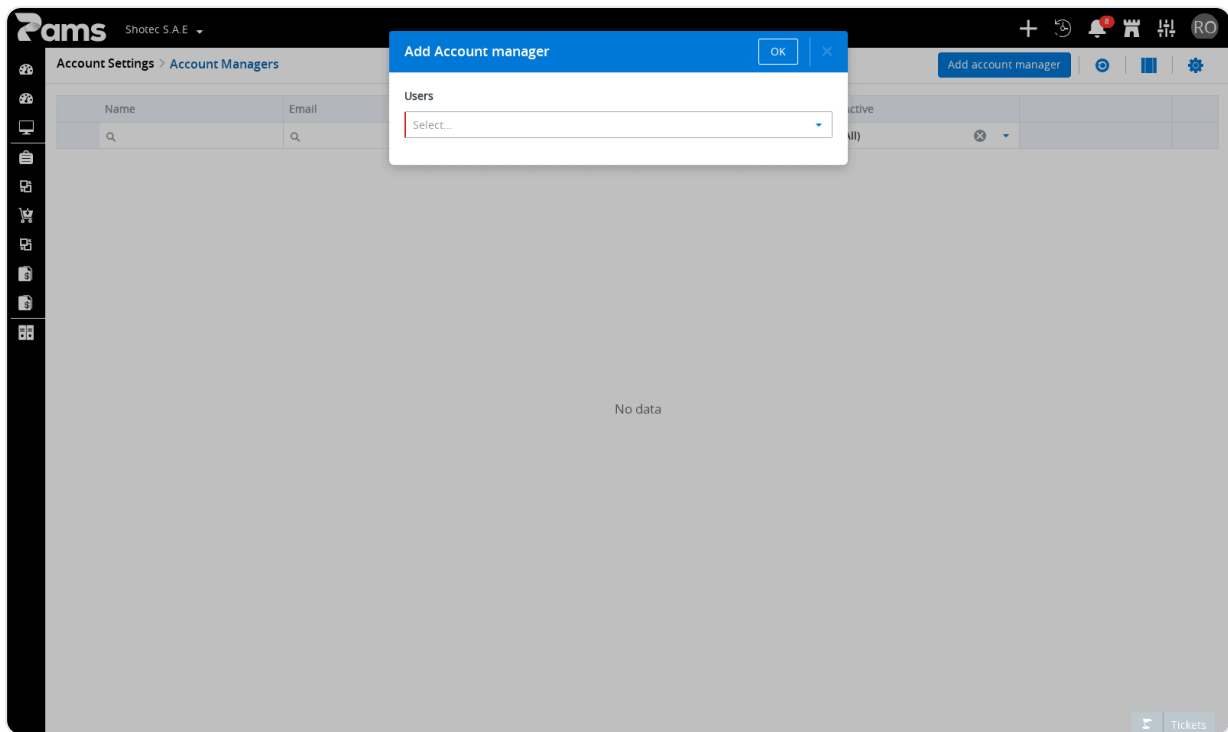
headers come from your list layout, so the headers you see can vary with that layout.

The data columns are read-only. The screen does not provide an edit control for an existing account

manager. Continue with [assigning account ownership](#), [removing or exporting account managers](#) when you need those actions.

When you select **Add account manager**, the **Add Account manager** dialog contains the **Users**

searchable selection field. The field carries a required marker, and the dialog provides **OK**.



Screen area	What you can do there
Data columns	Review the grid headers.
Existing account managers	Existing account-manager records are read-only on this screen.
Add dialog	Select a person in Users , then submit with OK .

To add a person, follow [Add an account manager](#).

Add an account manager

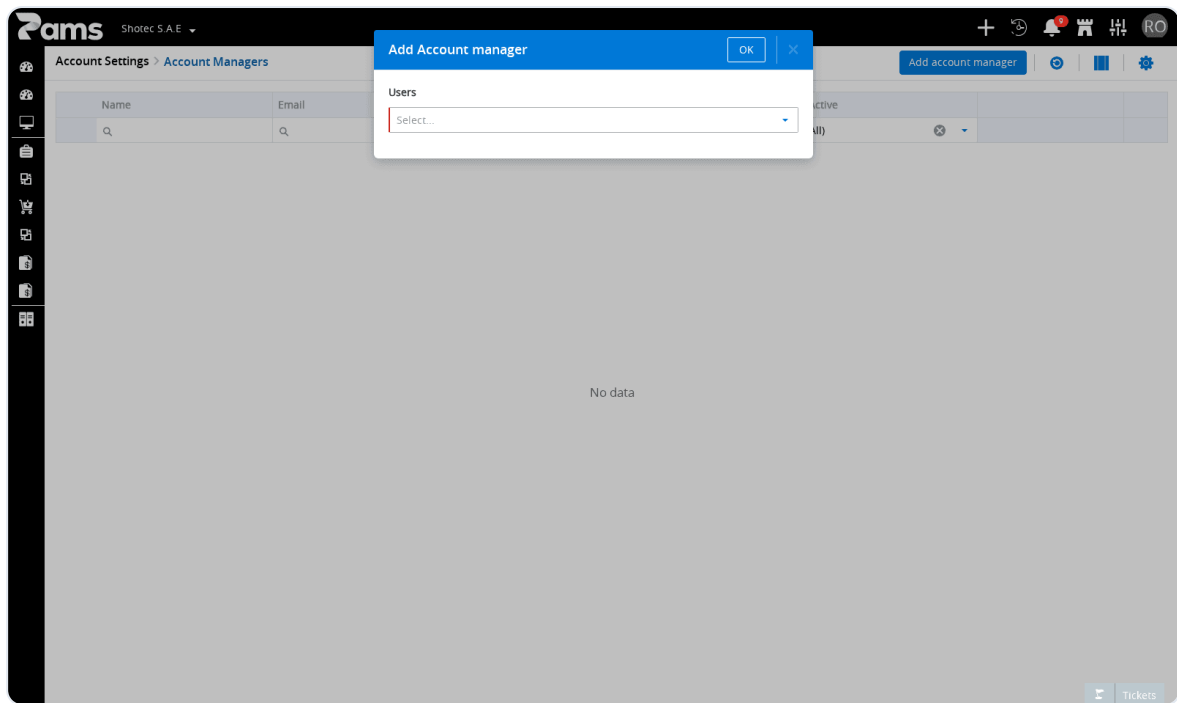
Follow these steps when you need to add a person to the account-manager list.

Prerequisites

- Your account has permission to add an account manager.
- You know which person to select in **Users**.

Steps

1. Select **Add account manager**.
2. In the **Add Account manager** dialog, open **Users**.
3. Select the person to add in **Users**.
4. Select **OK**.



If you select **OK** before choosing a person, the required field uses the message **This Field Is Required**.

Result: If the add request is accepted, the account-manager list refreshes.

Continue with [assigning account ownership](#) or [removing or exporting account managers](#).

Assign account ownership

Use account ownership to identify the account manager who owns the selected account. The **Make as account owner** action appears when you are an account owner and the selected row is not already an account owner.

Prerequisites

- You are an account owner.
- The selected row is not already an account owner.

Steps

1. In an eligible row, select **Make as account owner**.
2. Read the ownership confirmation in the dialog.

3. Choose one action:

If you need to...	Select
Confirm the ownership change	Yes
Leave ownership unchanged	No

4. If you selected **Yes**, wait for the account-manager list to reload.

The ownership dialog states `Account Ownership has been changed` and `The new manager should receive an email shortly to notifying his new role`.

Result: If the ownership operation completes, the account-manager list reloads and the dialog closes.

Continue with [removing or exporting account managers](#).

Remove or export account managers

Follow the removal steps for an eligible row. Follow the export steps when you need a file of the list.

The two actions have different conditions and outcomes.

Remove an account manager

Prerequisites

- The selected row is not already an account owner.

Steps

1. Select the row's delete icon.
2. Read the exclusion question: `Are you sure you want to exclude this user as account manger?`.
3. Choose one action:

If you need to...	Select
Leave the account manager on the list	Cancel
Continue the removal	Delete

4. If the permanent-delete dialog opens, read `Are you sure you want to delete this user totally from the database?`.

5. Choose one action:

If you need to...	Select
Stop permanent deletion	Cancel
Submit permanent deletion	Delete

Result: If deletion succeeds, the account-manager list refreshes.

To create a file of the list, follow [Export the account-manager list](#).

Export the account-manager list

Prerequisites

- Your account has export permission.

Steps

1. Select **Export**.
2. Choose the export option in the **Exporting List:** dialog.
3. Choose one action:

If you need to...	Select
Close the dialog without exporting	Cancel
Submit the export	Export

If the list has no rows, the export action uses the message `NO Data to Export` .

Result: If rows are available, the selected export is sent for processing; otherwise, the empty-list message appears.

Continue with [When an account-manager action does not work](#) if a message appears.

When an account-manager action does not work

Use the message on screen to choose the next action.

What you see	What it means	What to do
<code>This Field Is Required</code>	Users has no selected person.	Select a person in Users .

What you see	What it means	What to do
Are you sure you want to exclude this user as account manger?	The exclusion confirmation asks whether to remove the manager from the list.	Select Delete to continue.
Are you sure you want to delete this user totally from the database?	The permanent-delete dialog is open.	Select Delete to submit the deletion.
Account Ownership has been changed	The ownership confirmation reports the ownership change.	Continue after the ownership dialog closes.
The new manager should receive an email shortly to notifying his new role	The ownership confirmation includes a notice for the new manager.	Continue after reviewing the notice.
NO Data to Export	The list has no rows to export.	Return to the list and use the headers to confirm whether rows are available.
You can not delete yourself	The selected account manager is your own user.	Do not use deletion for your own account manager entry.
Your request was completed successfully	The common success response is displayed.	Continue with the next list-maintenance task.

After you resolve the message, return to [What to do next](#).

What to do next

After reviewing the list, continue with the next task from the same screen: add an account manager, assign account ownership, remove an eligible account manager, or export the list. If the list shows

No data, use **Add account manager** to begin adding a person.

The list remains the starting point for these maintenance tasks.