Create an account

September 10, 2026

Create an account

Create a new account or update an existing account record, then continue from the account record or a related page.

Create or update an account

An account is a business relationship record for work with clients, principals, and suppliers. Create one when the relationship is new; update one when the saved record already exists and its information changes.

The account form is a large form with several embedded areas. Use the form to create or update the account itself. Use the related pages for list work and companion tasks.

If you need to…	Go to
Create or update the account	Before you start
Open a new or saved account form	Find the account form
Enter the account's main information	Enter the account information
Work with registrations, contacts, projects, or files	Handle conditional account details
Find saved account records	Accounts
Create a contact person	Create a contact
Review account projects	Projects
Review account registrations	VL registrations

Before you start

Prepare the information and record state that match the work you are about to do. A primary ID is the identifier that marks an account as saved.

Prepare	Why it matters
The account's display name and full name	These identify the account in the form and are checked before saving.
The account type and market segment	These classify the account and determine which related choices apply.
Account-manager information, when the account is a client	**Account Manager** is shown for a client account.
Address information	The form can include **Destination Title**, **Country**, **State**, **City**, **Street**, and **Zip-code**.
A new account with no primary ID	The new-account fields are used for a new record.
An existing account with a primary ID	The existing-account route is used to update a saved record.

Some fields are required only where your company configures them as mandatory. The
required marker appears on **Display name**, **Full Name**, and **Destination Title**.

> **Note:** A field can be required only where your company configures it as mandatory.

Find the account form

Open the new-account form to start an account. Open the saved account when you already
have its account identifier.

Prerequisites

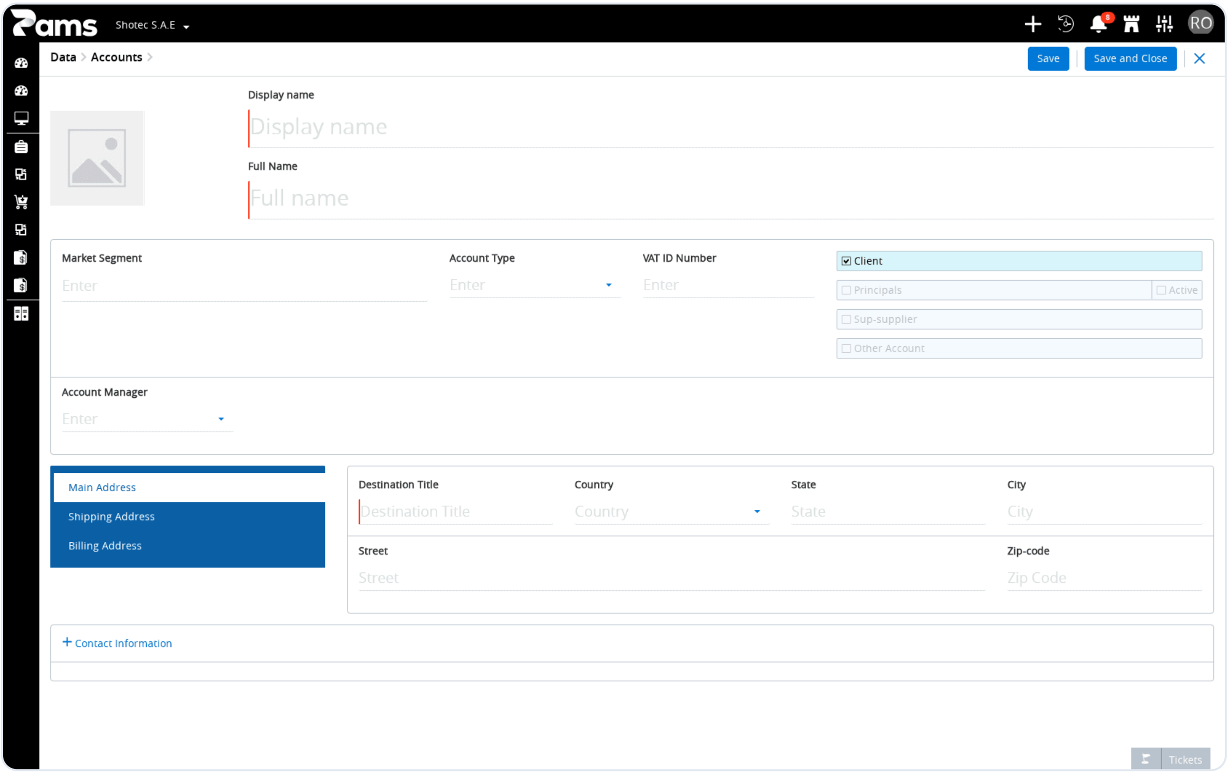
- For a new account, have the account information ready.
- For an existing account, have its account identifier.

Steps

1. Choose the form that matches your task.

If you need to…	Open
Start a new account	The new-account form
Update an existing account	The saved account

If you need to…	Open
Update an account that uses the logo-specific form	The saved account



Result: The new-account form opens with the account fields ready.

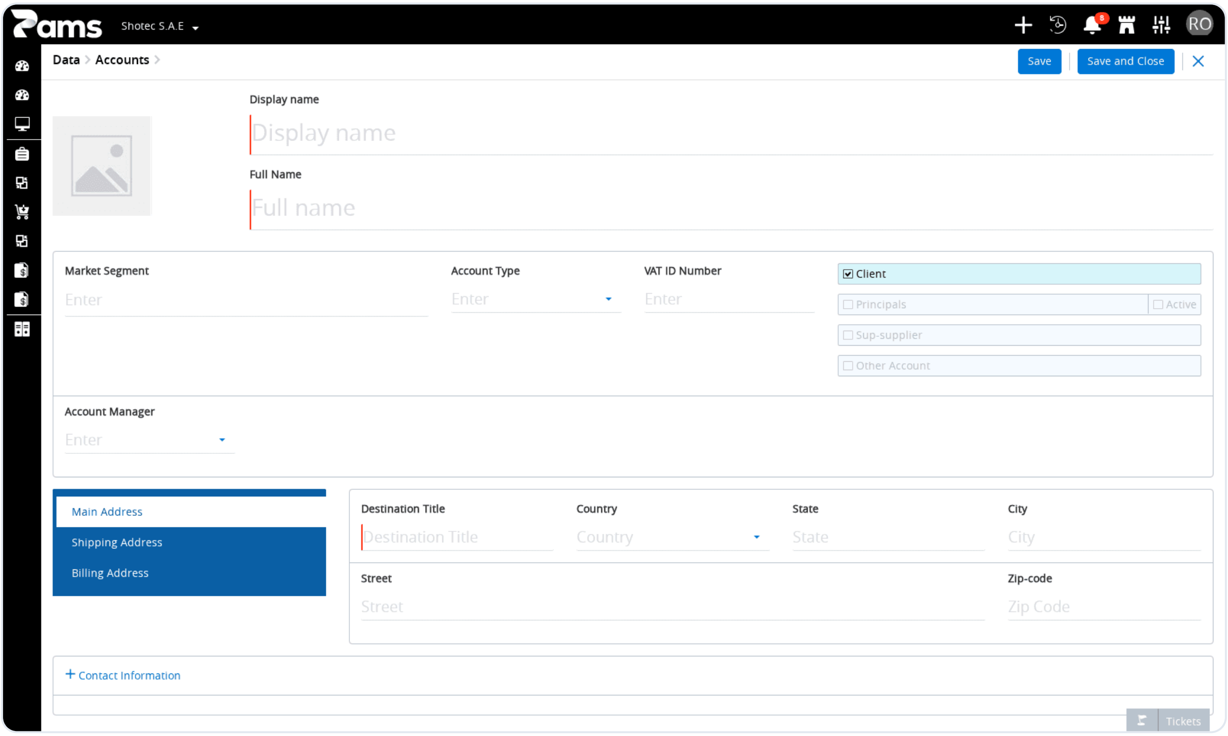
Understand the account screen

The new-account screen presents identity, classification, address, account-type, and save areas. Related areas appear as the account becomes a saved record.

The initial form shows 12 labelled fields and 24 additional visible controls. The labelled fields are grouped below.

Area	Fields or controls
Identity and classification	**Display name**, **Full Name**, **Market Segment**, **Account Type**, **VAT ID Number**, **Account Manager**
Account types	**Client**, **Active**, and other account-type controls
Main address	**Destination Title**, **Country**, **State**, **City**, **Street**, **Zip-code**
Save	**Save**, **Save and Close**
Saved-record areas	**Comments**, the contact-person area, the registration area, the project area, the contract-data area, **Last Modifications**

The initial form has no table headings. The contact-person and project areas use their own
table headings when those saved-record areas are available; work from the headings shown
there.



Result: You can locate the fields, account-type controls, save controls, and related areas before entering information.

Enter the account information

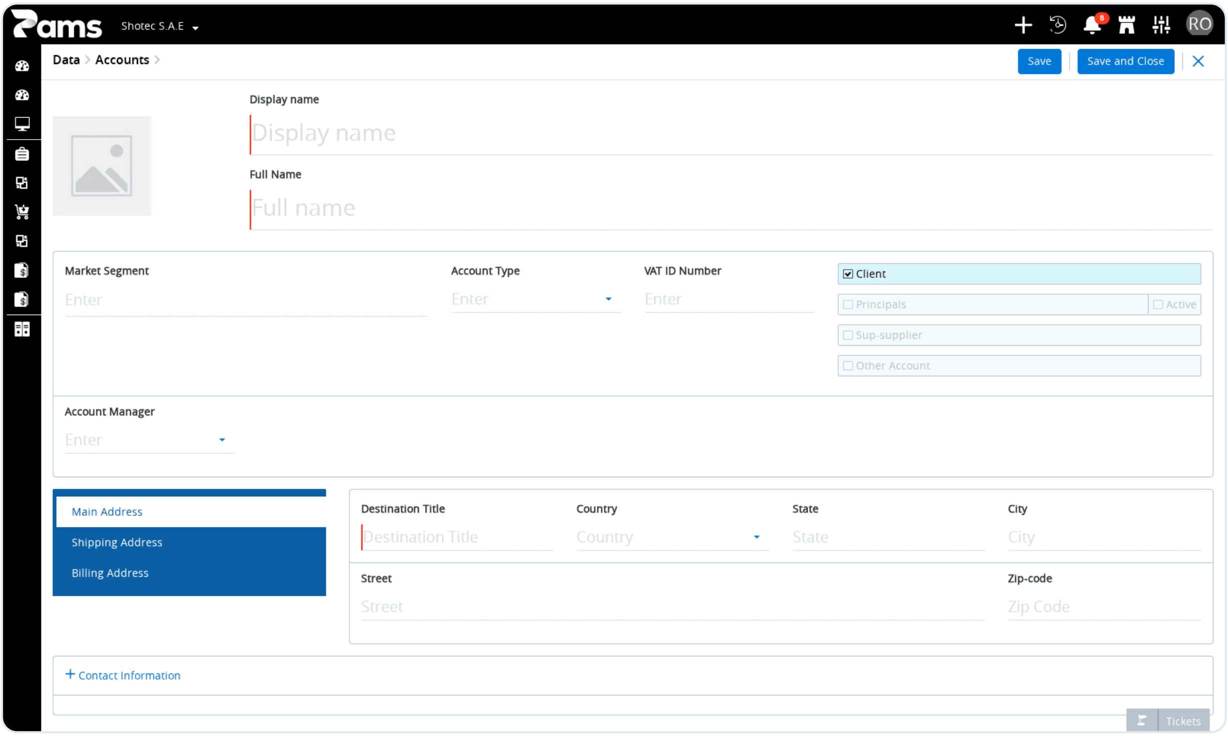
Prerequisites

- Open the appropriate account form.
- Have the account identity and address information ready.

Steps

1. Enter the account's name in **Display name**.
2. Enter the account's full name in **Full Name**.
3. Select the applicable values in **Market Segment** and **Account Type**.
4. Enter the account's tax identifier in **VAT ID Number**.
5. If the account is a client, select its value in **Account Manager**.

6. In the account-type controls, select the rendered **Sup-supplier** control when it applies.
7. Enter the address in **Destination Title**, **Country**, **State**, **City**, **Street**, and **Zip-code**.
8. Add the contact-information types you need: **Phone**, **Fax**, **Mobile**, **Email**, **Website**, **Online Support**, **Office**, or **Pager**.
9. Select **Save** or **Save and Close**.



Result: The form checks the mandatory fields. When a new account is saved, the new account opens as a saved account for editing and can display `Your request was completed successfully`.

Handle conditional account details

The related areas hold information that applies only to certain account types or to a saved account. Choose the branch that matches the account.

If the account is…	Use
A principal	**Client** is required for a new registration.
Not a principal	**Principal** is required for a new registration.
A principal or a client	Open the registration area.

If the account is…	Use
Not a company	Open the contact-person area.
A saved account	Open **Comments**, the project area, or **Last Modifications**.
A principal and you have permission to view contract data	Open the contract-data area.

Prerequisites

- Save the account before using areas that require a primary ID.
- Choose the account type before completing a conditional registration.

Steps

1. Choose the registration branch that matches the account.

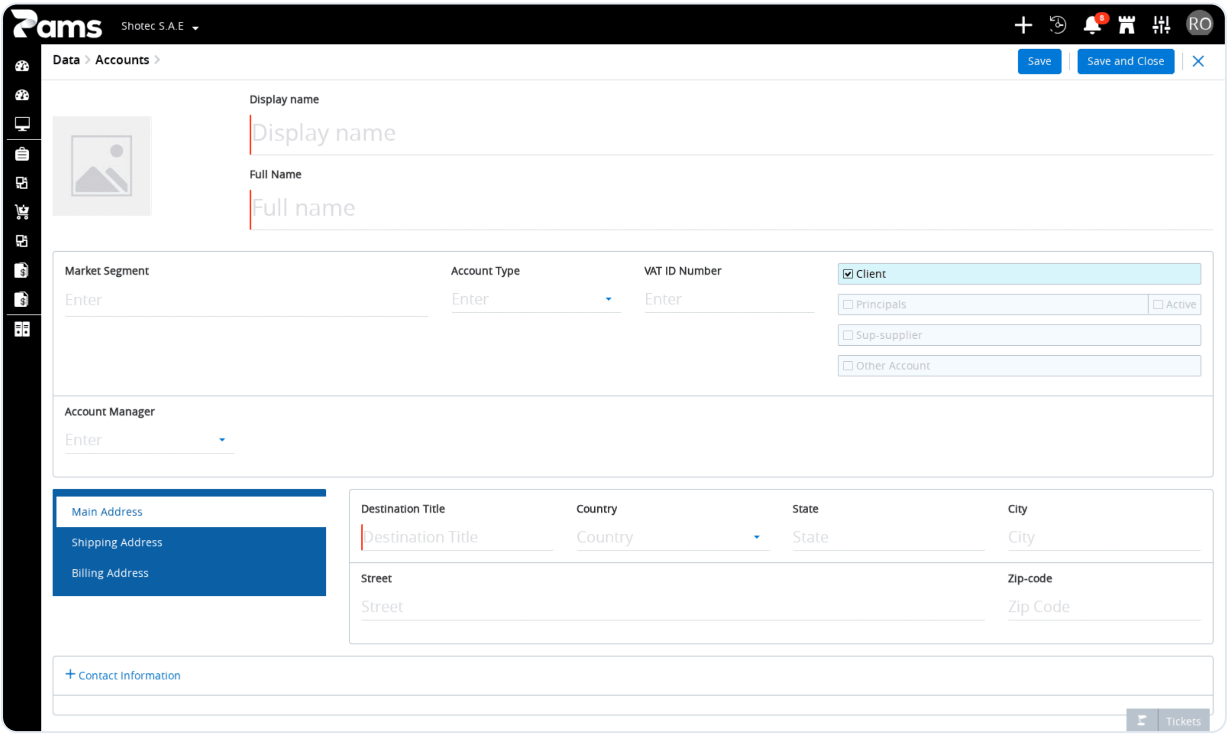
If the account is…	Select or open
A principal	**Client**, **Status**, and the registration area
Not a principal	**Principal**, **Status**, and the registration area

2. Enter **Registration Number** when you have one.
3. Enter **Registration date** no later than today.
4. Open the contact-person area when the account is not a company.
5. Open the contract-data area when the account is a principal and you can view contract data.
6. Open **Comments**, the project area, or **Last Modifications** for a saved account.

For an existing account, the account form also declares these fields:

Field	Rule
Expiry Date	The date cannot be earlier than today.
Cancellation Period	Enter a number of at least `1`.
Product Type	Select the applicable contract-data value.

The contact-person form declares **Name**, **Position**, and an organizational field, as well as the contact-information types listed in the account form.



Result: The applicable registration or saved-account area is open, with its fields available for the account's condition.

Save the account and resolve problems

The form checks mandatory values before it sends the account information for saving. Use the message text to correct the relevant field or account name.

Prerequisites

- Complete the fields that carry a required marker.
- Have a unique account name when creating a new account.

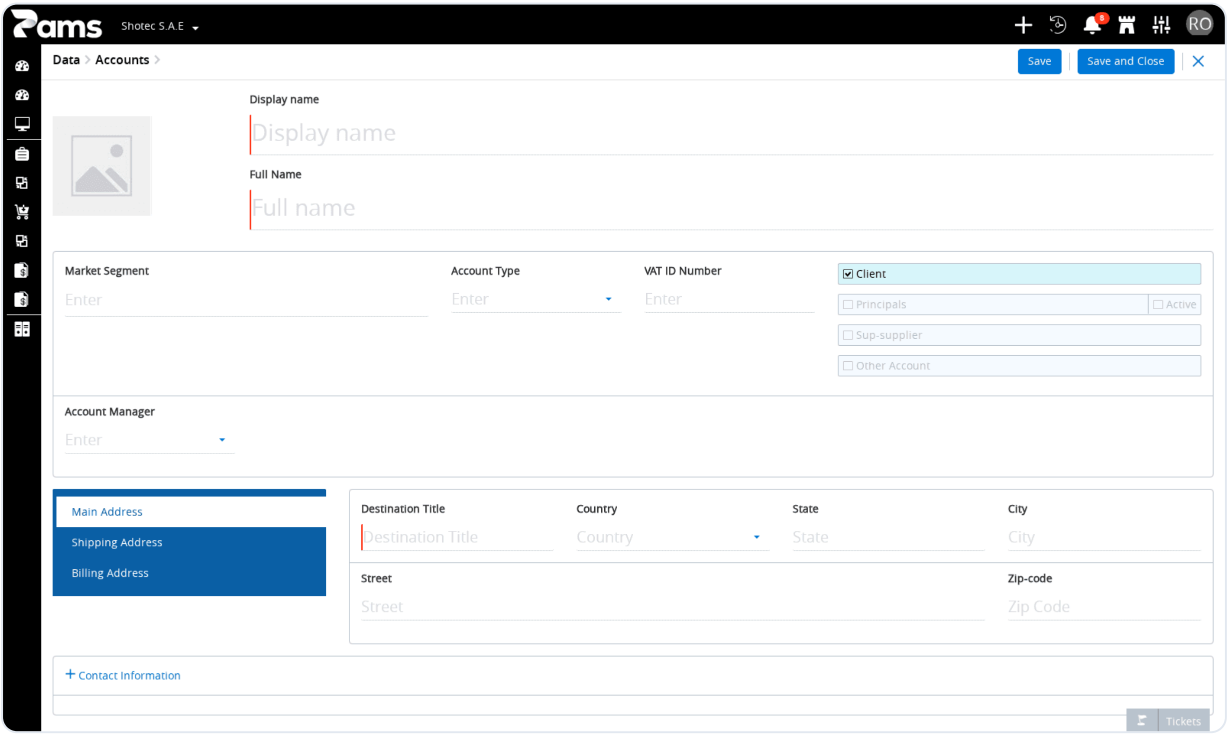
Steps

1. Choose the save action.

If you need to…	Select
Keep the account on the form	**Save**
Use the close variant	**Save and Close**

2. Resolve the message that appears, then select **Save** again.

Message	Resolve it by
`This Field Is Required`	Enter the missing value, then select **Save** again.
`An account with this name already exists`	Enter a different value in **Display name**, then select **Save** again.
`An error occurred while processing your request`	Review the account information, then select **Save** again.



Result: The form either continues the save operation or displays a message that identifies the correction to make.

Message	What to check
`This Field Is Required`	Complete the field carrying the required marker.
`Please Solve the Following Issues :`	Read the listed validation issues and correct each named field.
`Display Name field is mandatory`	Enter a value in **Display name**.
`Full Name field is mandatory`	Enter a value in **Full Name**.
`Destination Title field is mandatory`	Enter a value in **Destination Title**.
`An account with this name already exists`	Use a different account name.

Message	What to check
`An error occurred while processing your request`	Review the form values and select **Save** again.
`Your request was completed successfully`	Continue from the saved account record.
`Just '_''-''.' And '&' Characters Accepted`	Remove characters outside the set named in the message, then select **Save** again.

Out of scope

These messages belong to companion pages:

Message	Continue in
`Error: Vendor not saved yet`	Accounts
`Error: Client not saved yet`	Accounts
`Forbidden characters detected. Please remove them and try again.`	Accounts
`You already have a contact with this name`	Create a contact

After saving

The saved account remains the record you revisit from the Accounts area. After a successful save, the new account opens as a saved account for editing.

Use the companion pages when the next job is about the related record rather than the
account itself:

- Accounts for saved account list and record orientation.
- Contacts, Create a contact, or Contact record for contact work.
- Projects for project work.
- VL registrations for registration reference work.
- Libraries and files for attached files.

Result: You know where to continue account work and which companion page owns the
next related job.