Configure Account Managers

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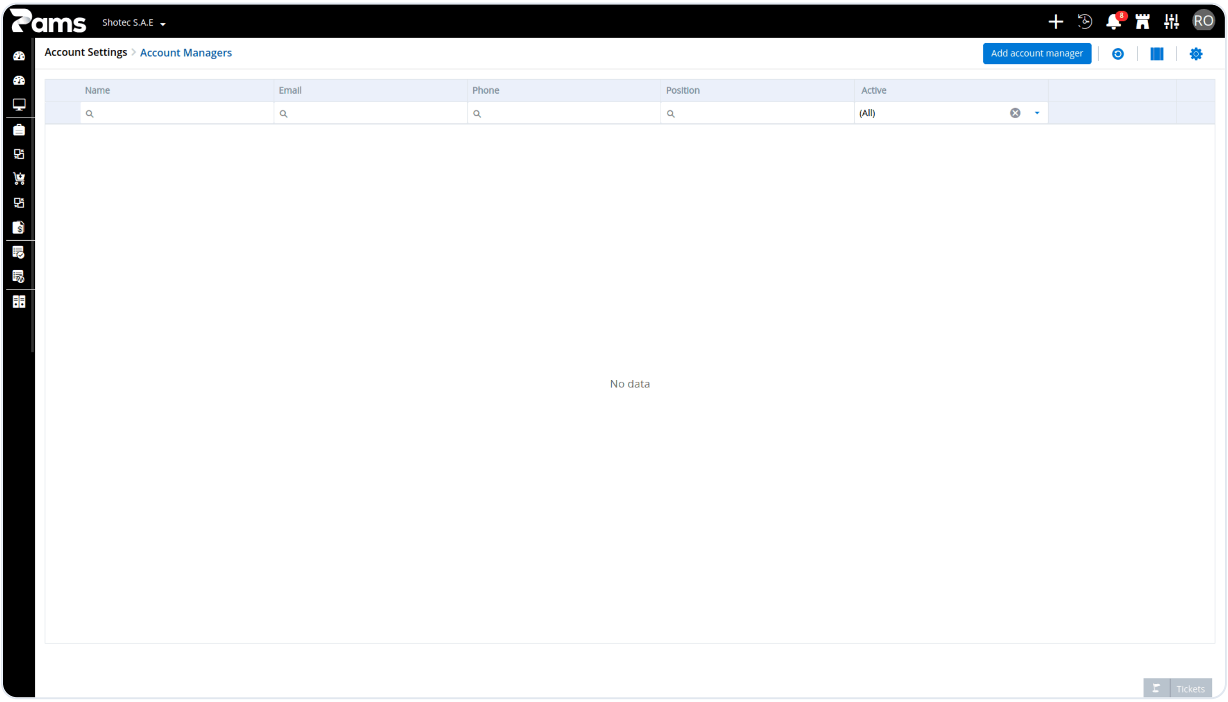
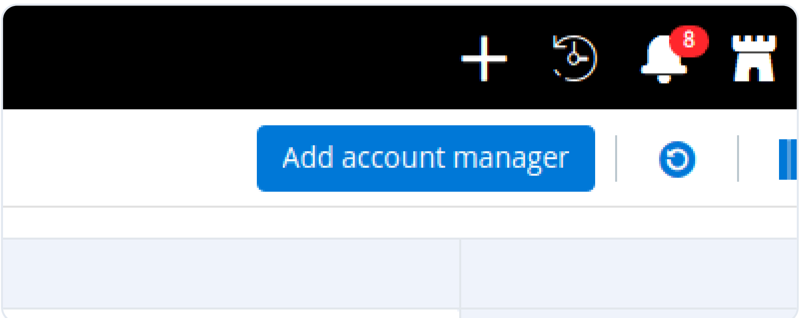
Administrator Guide › Configuration › Account Manager



Account Managers — Configurations › Account Managers



Overview

Use the **Account Managers** configuration area to maintain the account manager records available in the application. Administrators use this area when an account manager must be added or when an existing record must be located for review. The account manager list displays the record's **Name, Email, Phone, Position**, and **Active** information.

Before you start

Ensure that you have access to **Configurations > Account Managers**. The account manager entry form contains one mandatory field; complete the required information before completing the entry.

Steps

1. Navigate to **Configurations > Account Managers**.
2. Review the existing account manager records in the list. Use the **Name, Email, Phone, Position**, and **Active** columns to identify the record you need to configure.
3. To add an account manager, select **Add account manager**.
4. Complete the mandatory field in the account manager form. Enter the remaining available account manager information as required by your organization.
5. Complete the account manager entry by using the available action in the form.
6. To locate an existing account manager record, enter relevant information in the **Search box**.
7. Select **Select** when you need to select an account manager record from the displayed list.

Tips & cautions

> **Note:** The account manager form has one mandatory field. Complete this field before completing the entry.

> **Tip:** Use the **Email** and **Phone** columns together with **Name** to distinguish between account managers with similar names.

> **Warning:** Review the **Active** column when selecting an account manager record to ensure that you are working with the appropriate record.

Troubleshooting

- The required information cannot be completed → A mandatory field has not been populated → Complete the mandatory field in the account manager form before completing the entry.
- The required account manager is not visible in the list → The list contains multiple account manager records → Use the **Search box** and review the **Name, Email, Phone**, and **Position** columns.
- The wrong account manager may be selected → Multiple records have similar identifying information → Review the displayed record details before selecting **Select**.

Result

The Account Managers configuration area is available for adding, locating, and selecting account manager records.

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