

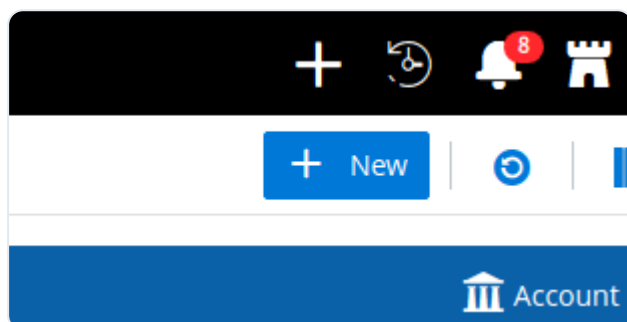
August 18, 2026

Configure Accounts

Administrator Guide › Data › Account

Accounts > Clients					
+ New [Filter Icon] [List Icon] [Settings Icon]					
All	Clients	Principals	Sub-supplier	Account Managers	
Display name	Full name	Type	Market segment	Active	
Q	Q	Q	Q	(All)	[Dropdown Arrow]
6th October PP	6th October Power Stati	Trader	Electricity and Power,	☒	
AAM	Amsterdam Alexandria Marin	Contractor	General Industries,	☒	
AAW	AAW Engineering	Contractor	Water and Waste water,	☒	
abc	aaa			☒	
About Steel	About Steel For Houseware	End User		☒	
ABTECH	ABTECH			☒	
Abu Dhabi Gas	Abu Dhabi Gas Industries Ltd. (gasco egypt)	End User	Oil and Gas - General,	☒	
Abu Elhassan	Abu El Hassan for Contracting & Supplies	Engineering	Water and Waste water,	☒	
AbuRawash Plant	Abu Rawash Waste Water Treatment Plant	End User	Water and Waste water,	☒	[Edit Icon] [Delete Icon]
Abu-Sultan PS	Abu-Sultan Power Station	End User	Electricity and Power,	☒	
AC & T	Advanced Chemicals & Technology	End User	Chemicals,	☒	
ACAPI	ACAPI - ALPHA-CHEM ADVANCED PHARMACEUTIC...	Trader	Pharmaceutical,	☒	
ACC	ACC	Trader	General Industries,	☒	
Acciona	Acciona	Contractor	Water and Waste water,	☒	
ACE	ACE-Moharram Bakhoun	Engineering	Water and Waste water,	☐	
ACE Steel	Ace For Steel Fabrication & Contracting	Contractor	General Industries,	☒	
ACETO	Aceto Industries	End User	Chemicals,	☒	
ACF	Aircraft Factory	Contractor	Oil and Gas - General,	☒	
ACFET	Awareness Company For engineering and trading	Contractor	General Industries,	☒	
ACG	Arab Commercial Group	Trader	General Industries,	☒	
ACI	Advanced Chemical Industries	End User	Chemicals,	☒	
Count: 2109					

Accounts — Data › Accounts



Overview

Use the **Accounts** workspace to access account records maintained in the application's data area. Administrators use this workspace when reviewing the account list and initiating the addition of an account record. The list identifies accounts by **Display name**, **Full name**, **Type**, **Market segment**, and **Active**.

Before you start

You need access to the **Data** navigation area and the **Accounts** workspace.

Steps

1. On the main navigation bar, select **Data**.
2. Select **Accounts** to open the Accounts workspace.
3. Review the available account records in the list. Use the displayed columns to distinguish records:
 - **Display name** identifies the account in the list.
 - **Full name** shows the account's full name.
 - **Type** identifies the account type.
 - **Market segment** identifies the associated market segment.
 - **Active** indicates whether the account is active.
4. Select **All** to access the complete Accounts list.
5. Select **Clients** when you need to work from the client-related account list.
6. Select **New** to begin adding an account record.

Note: Use the **Display name** and **Full name** columns together when reviewing accounts with similar names.

Tip: Review **Type**, **Market segment**, and **Active** before adding a new record to help maintain consistent account data.

Troubleshooting

- **Symptom:** You cannot locate the Accounts workspace.
Likely cause: The **Data** navigation area has not been opened.
Fix: Select **Data**, and then select **Accounts**.

- **Symptom:** You need to begin adding an account record.
Likely cause: The new-record action has not been opened.
Fix: Select **New** in the Accounts workspace.

Result

The Accounts workspace is open and ready for account record review or new account setup.

Related pages

- [Configure Contacts](#)
- **Data — Learning Path**
- [Data — Overview](#)
- [Projects](#)
- [Reference list](#)
- [VL registrations](#)
- ****Apply Deductions**
- **Close Fully Paid Invoice****