PAMS V2

Configure Accounts

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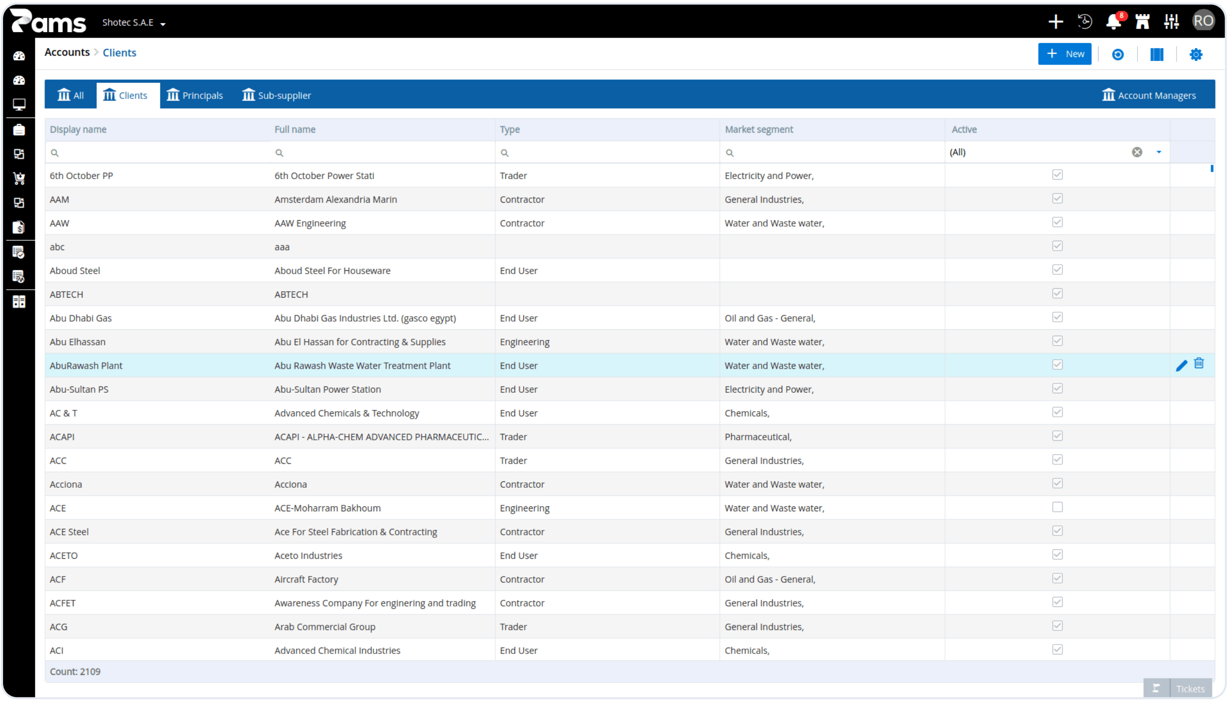
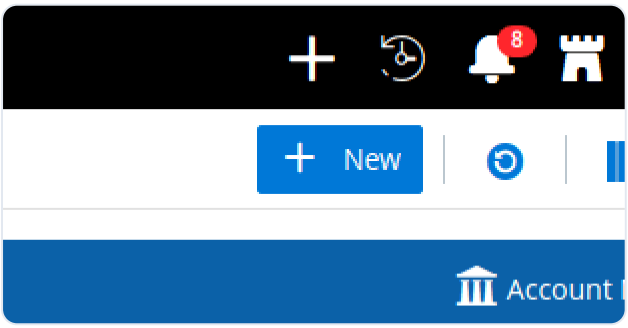
Administrator Guide › Data › Account



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.

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