

Accounts

Accounts > Clients					
All Clients Principals Sub-supplier Account Managers					
Display name	Full name	Type	Market segment	Active	
Q	Q	Q	Q	(All)	
6th October PP	6th October Power Stati	End User	Electricity & Power,	☒	
AAM	Amsterdam Alexandria Marin	OEM	General Industries,	☒	
AAW	AAW Engineering	Contractor	Water & Waste water,	☒	
abc	aaa			☒	
Abu Elhol	jkhhjh		Food & Beverage,	☒	
Aboud Steel	Aboud Steel For Houseware			☒	
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 & Waste water,	☒	Edit
AbuRawash Plant	Abu Rawash Waste Water Treatment Plant	End User	Water & Waste water,	☒	
Abu-Sultan PS	Abu-Sultan Power Station	End User	Electricity & 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 & Waste water,	☒	
ACE	ACE-Moharram Bakhoun	Engineering	Water & Waste water,	☐	
ACE Steel	Ace For Steel Fabrication & Contracting	Contractor	General Industries,	☒	
ACETO	Aceto Industries	End User	Chemicals,	☒	
ACF	Aircraft Factory	OEM		☐	
ACFET	Awareness Company For engineering and trading	Contractor	General Industries,	☒	
ACG	Arab Commercial Group	Trader	General Industries,	☒	

Overview

Open the feature from **Data > Accounts**. Use the available tabs to review account groups and use layouts, search, and column selection to present the information needed for your daily work.

Settings

Before reviewing Accounts, set up a list layout that shows the columns your role needs. Layout settings affect how account information is displayed in this Accounts list.

1. Open **Data > Accounts**.

Display name	Full name	Type	Market segment	Active
Q	Q	Q	Q	(All)
6th October PP	6th October Power Stati	End User	Electricity & Power,	☒
AAM	Amsterdam Alexandria Marin	OEM	General Industries,	☒
AAW	AAW Engineering	Contractor	Water & Waste water,	☒
abc	aaa			☒
Abo Elhol	jkhhjh		Food & Beverage,	☒
Aboud Steel	Aboud Steel For Houseware			☒
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 & Waste water,	☒
AbuRawash Plant	Abu Rawash Waste Water Treatment Plant	End User	Water & Waste water,	☒
Abu-Sultan PS	Abu-Sultan Power Station	End User	No data Electricity & 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 & Waste water,	☒
ACE	ACE-Moharram Bakhoun	Engineering	Water & Waste water,	☐

Count: 2402

Accounts — Data > Accounts

2. To choose an existing layout, use **Layout name** and select an available layout from **Select....**
3. To return to the standard list arrangement, select **Standard Layout**.
4. To create a reusable layout, select **Add Layout**, enter a name in **Layout name**, and select the columns required for your work.
5. Select **Save** to keep the new layout. Select **Cancel** if you do not want to retain the changes.
6. To adjust the columns in the active layout, select **Columns Chooser**. Use the column selection interface to include the account details you need, such as display name, full name, type, market segment, and active status.
7. When you have changed an existing layout, select **Update Current** to save the changes to that layout. To remove the active saved layout, select **Delete Current**.

Tip: Keep a layout focused on the information you use most often. For example, sales users may require market segment and active status, while purchasing users may prioritize account name and type.

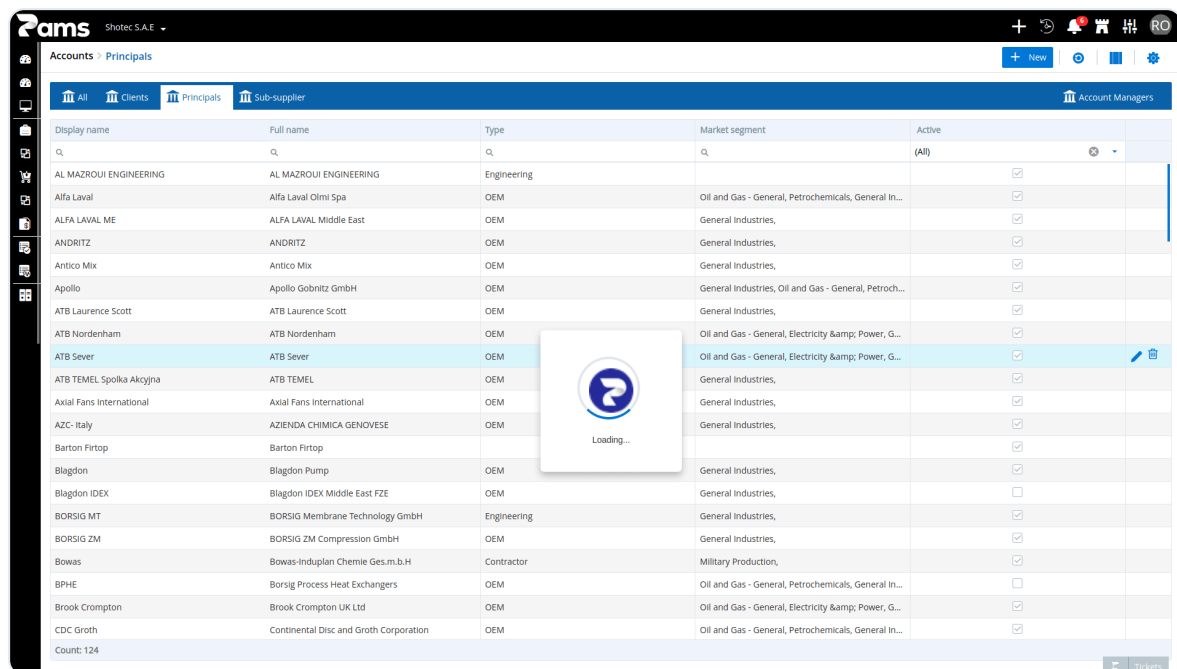
Warning: Select **Delete Current** only when you are certain that the current saved layout is no longer needed.

Workflow

Use this workflow to locate account records, review the appropriate account group, and manage the way the account list is displayed.

1. Open **Data > Accounts** and start with the account list.

Review the visible account columns, including **Display name**, **Full name**, **Type**, **Market segment**, and **Active**. If the current layout does not provide the information needed for your task, change the layout before reviewing records.



Display name	Full name	Type	Market segment	Active
AL MAZROUI ENGINEERING	AL MAZROUI ENGINEERING	Engineering		☒
Alfa Laval	Alfa Laval Olmi Spa	OEM	Oil and Gas - General, Petrochemicals, General In...	☒
ALFA LAVAL ME	ALFA LAVAL Middle East	OEM	General Industries,	☒
ANDRITZ	ANDRITZ	OEM	General Industries,	☒
Antico Mix	Antico Mix	OEM	General Industries,	☒
Apollo	Apollo Gobnitz GmbH	OEM	General Industries, Oil and Gas - General, Petroch...	☒
ATB Laurence Scott	ATB Laurence Scott	OEM	General Industries,	☒
ATB Nordenham	ATB Nordenham	OEM	Oil and Gas - General, Electricity & Power, G...	☒
ATB Sever	ATB Sever	OEM	Oil and Gas - General, Electricity & Power, G...	☒
ATB TEMEL Spolka Akcyjna	ATB TEMEL	OEM	General Industries,	☒
Axial Fans International	Axial Fans International	OEM	General Industries,	☒
AZC- Italy	AZIENDA CHIMICA GENOVESE	OEM	General Industries,	☒
Barton Firtop	Barton Firtop			☒
Blagdon	Blagdon Pump	OEM	General Industries,	☒
Blagdon IDEX	Blagdon IDEX Middle East FZE	OEM	General Industries,	☐
BORSIG MT	BORSIG Membrane Technology GmbH	Engineering	General Industries,	☒
BORSIG ZM	BORSIG ZM Compression GmbH	OEM	General Industries,	☒
Bowas	Bowas-Induplan Chemie Ges.m.b.H	Contractor	Military Production,	☒
BPHE	Borsig Process Heat Exchangers	OEM	Oil and Gas - General, Petrochemicals, General In...	☐
Brook Crompton	Brook Crompton UK Ltd	OEM	Oil and Gas - General, Electricity & Power, G...	☒
CDC Groth	Continental Disc and Groth Corporation	OEM	Oil and Gas - General, Petrochemicals, General In...	☒

Accounts — Data > Accounts

2. Choose how to find an account.

- To locate a known account, enter identifying text in **Search**.
- To work with a particular group of accounts, select the relevant tab: **Account Managers**, **All**, **Principals**, or **Sub-supplier**.

- To change the displayed information, use **Columns Chooser** or select another value in **Layout name**.

3. Decide whether the current layout is sufficient.

- If the displayed columns meet your needs, continue reviewing account records.
- If you need a different column arrangement for the current task, select **Columns Chooser**, make the required selection, and choose **Update Current** to retain changes to the active layout.
- If the changes should not alter an existing shared or preferred layout, select **Add Layout**, provide a value in **Layout name**, and choose **Save**.

4. Decide whether to start a new account record.

Select **New** when you need to begin adding an account. The Accounts screen provided here confirms that **New** is the action for starting a new record; complete the account information in the subsequent record screen according to your organization's account-maintenance procedure.

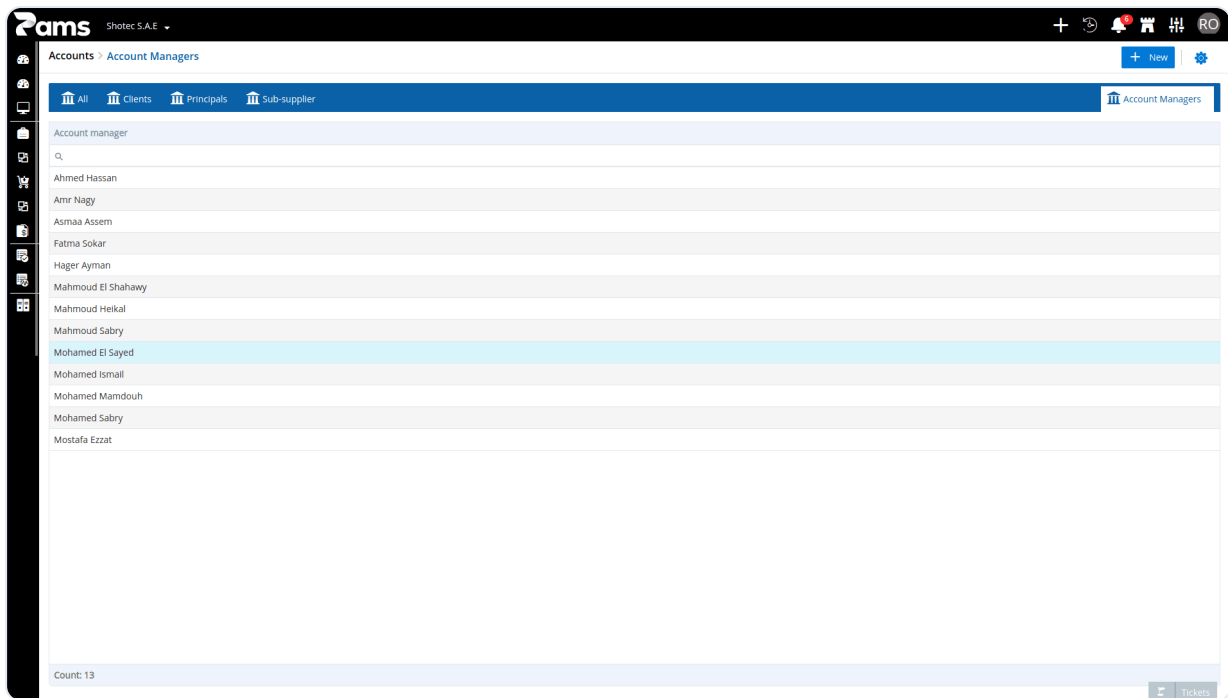
5. Refresh the list when required.

Select **Update icon (icn-update)** to update the displayed Accounts list. Use this when you need to review the current list again after making changes or when you expect the displayed results to have changed.

Note: The tabs identify separate account-list views. No control is provided on this screen to move an account from one tab to another; use each tab to review the records shown in that view.

Account Managers

The **Account Managers** tab provides an account-list view for reviewing records in the Account Managers grouping. Use the visible account columns to identify the account and review its display name, full name, type, market segment, and active status.



Accounts — Data > Accounts

Use **Search** when you need to narrow the displayed records, and use **Columns Chooser** when the currently visible columns do not provide enough detail for your review. This tab shows its account grouping; the available controls do not indicate a workflow action that moves records into or out of this tab.

All

The **All** tab is the broad account-list view for reviewing the available account records. It is useful when you do not yet know whether an account belongs in the Principals or Sub-supplier view, or when you need to search across the full list.

Review the account's display name, full name, type, market segment, and active indication as provided by the active layout. Use **Search** to find a particular record and select **Update icon (icn-update)** when you need to refresh the displayed list. No listed control moves a record into or out of the All tab.

Principals

The **Principals** tab displays the account records available in the Principals grouping. Use this view when your work requires reviewing principal accounts rather than the full account list.

You can use **Search** to locate a principal account and use **Columns Chooser** to display the information required for the review. The screen provides no action that

moves an account into or out of the Principals tab, so use this tab as a dedicated list view.

Sub-supplier

The **Sub-supplier** tab displays the account records available in the Sub-supplier grouping. Purchasing officers and project users can use this view when reviewing accounts relevant to supplier-related work.

Display name	Full name	Type	Market segment	Active
6th October PP	6th October Power Stati	End User	Electricity & Power,	☒
abc	aaa			☒
ActionSealTite	Action Seal Tite	OEM	Chemicals,	☒
AFEC pumps Europe BN	AFEC pumps Europe BN	OEM	Water & Waste water,	☒
Ahmed Aboud	Ahmed Aboud			☒
Ahmed Daoud	Ahmed Daoud& Co.	Trader	General Industries,	☒
Al Amana for trading &supplies and tasks of stea...	Al Amana for trading &supplies and tasks of stea...	Trader	General Industries,	☒
Al Hakim	Al Hakim	Trader	Oil and Gas - General,	☒
Al Majd Warner Lewis	Al Majd Warner Lewis Egypt	End User	Oil and Gas - General,	☒
Al Mawared Engineering & Trading Co.	Al Mawared Engineering & Trading Co.	Trader	General Industries,	☒
Al Watania	Al watania		No data	☒
Al-Andalos For Engineering Works, Trading & Cont...	Al-Andalos For Engineering Works, Trading & Cont...	Engineering		☒
Alfa Laval	Alfa Laval Olmi Spa	OEM	Oil and Gas - General, Petrochemicals, General In...	☒
ALFA LAVAL ME	ALFA LAVAL Middle East	OEM	General Industries,	☒
Al-Hashemlah	Al-Hashemlah	Contractor	Electricity & Power,	☒
Al Abdstar	Al Abdstar			☒

Accounts — Data > Accounts

Use the account name, type, market segment, and active information shown by the active layout to identify the required record. Use **Search** to narrow the list and **Update icon (icn-update)** to refresh it. No available control is listed for moving accounts into or out of the Sub-supplier view.

Examples

A purchasing officer needs to identify a sub-supplier account for an upcoming buyout and wants to see only the most relevant columns.

1. Open **Data > Accounts**.
2. Select the **Sub-supplier** tab to work in the sub-supplier account-list view.
3. Enter the supplier name or a distinctive part of its name in **Search** to narrow the displayed records.

4. Select **Columns Chooser** and ensure the layout displays **Display name**, **Full name**, **Type**, **Market segment**, and **Active**.
5. If this column arrangement will be useful for later buyouts, select **Add Layout**, enter `Buyout Supplier Review` in **Layout name**, and select **Save**.
6. Review the matching account record and confirm that the displayed type, market segment, and active information are appropriate for the current review.
7. Select **Update icon (icn-update)** if you need to refresh the account list before continuing with the buyout-related work.

Tips

Tip: Use the **All** tab when the account grouping is unknown, then use **Principals** or **Sub-supplier** to work in the more focused list view.

Note: **Standard Layout** restores the standard arrangement of the Accounts list. Use it when a saved or modified layout does not show the expected columns.

Warning: Select **Delete** or **Delete Current** only after confirming the item selected for deletion. The provided screen does not show a recovery action.

Troubleshooting

Symptom	Likely cause	Fix
The required account is not visible.	The current tab or search text is limiting the list.	Clear or revise Search , then select All to review the broad account list.
Important account details are not displayed.	The active layout does not include the required columns.	Select Columns Chooser and update the active layout with Update Current , or create a separate layout with Add Layout and Save .
A previously used layout is no longer active.	Another layout is selected, or the standard layout is in use.	Check Layout name , select the required layout from Select... , or use Standard Layout if the standard column arrangement is required.
The list does not show expected	The list may need to be refreshed.	Select Update icon (icn-update) and review the results again.

Symptom	Likely cause	Fix
current results.		

Related pages

- [Data — Overview](#)
- [Contacts](#)
- [Data — Learning Path](#)
- [Projects](#)
- [Reference list](#)