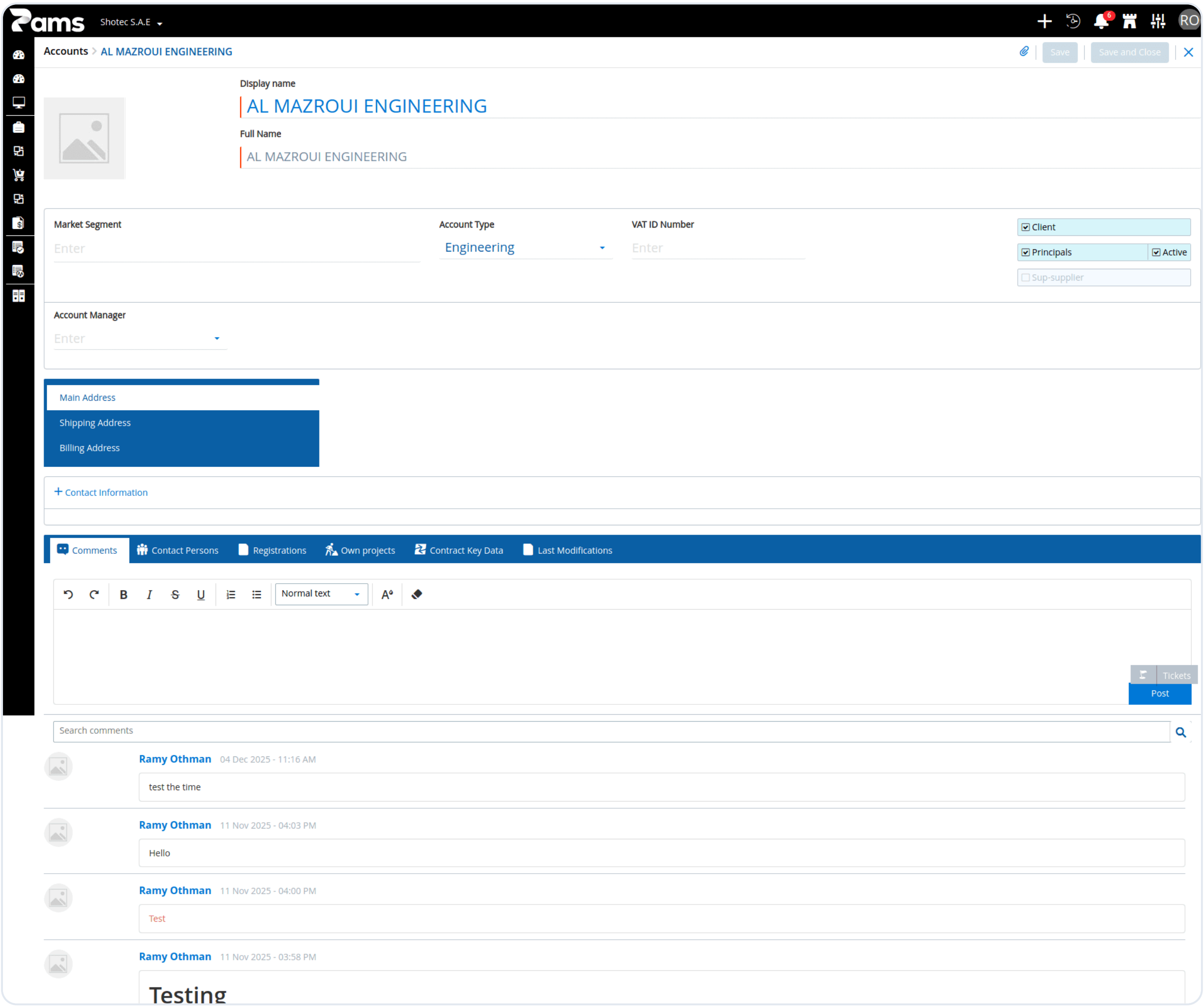
Accounts

July 29, 2026

Accounts

Applications › Market



accounts

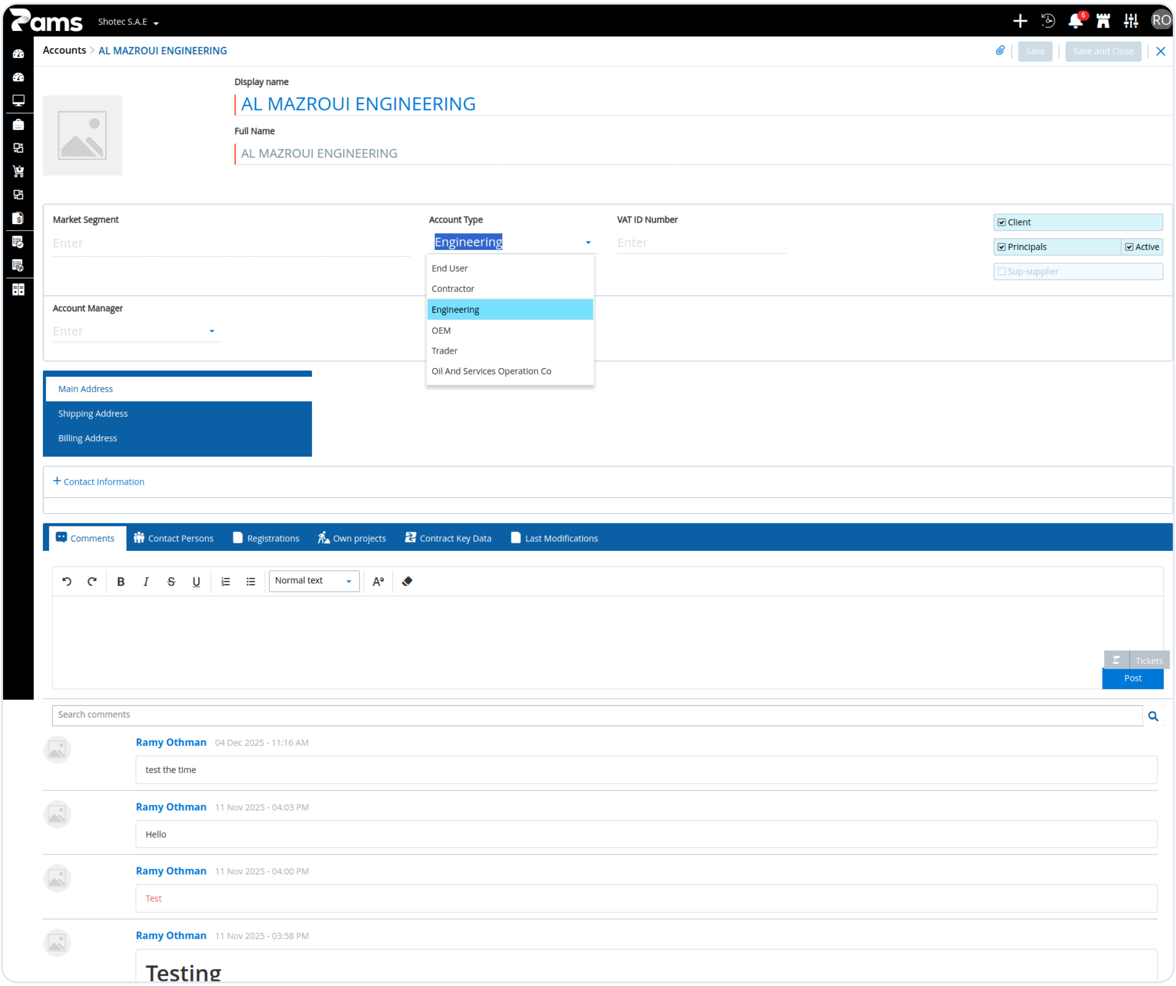
Overview

Accounts stores business-relationship information used across Market activities. Sales representatives, account managers, project managers, purchasing officers, warehouse managers, and finance officers can use an account record to maintain its identifying details, supporting information, comments, and attached files.

Use an account record when you need to review or update the organization details associated with commercial, project, purchasing, Warehouse, or Finance work. The available controls support entering information, formatting text, adding comments, selecting items, and saving the record.

Workflow

1. Open **Accounts** from the Market application area.



accounts

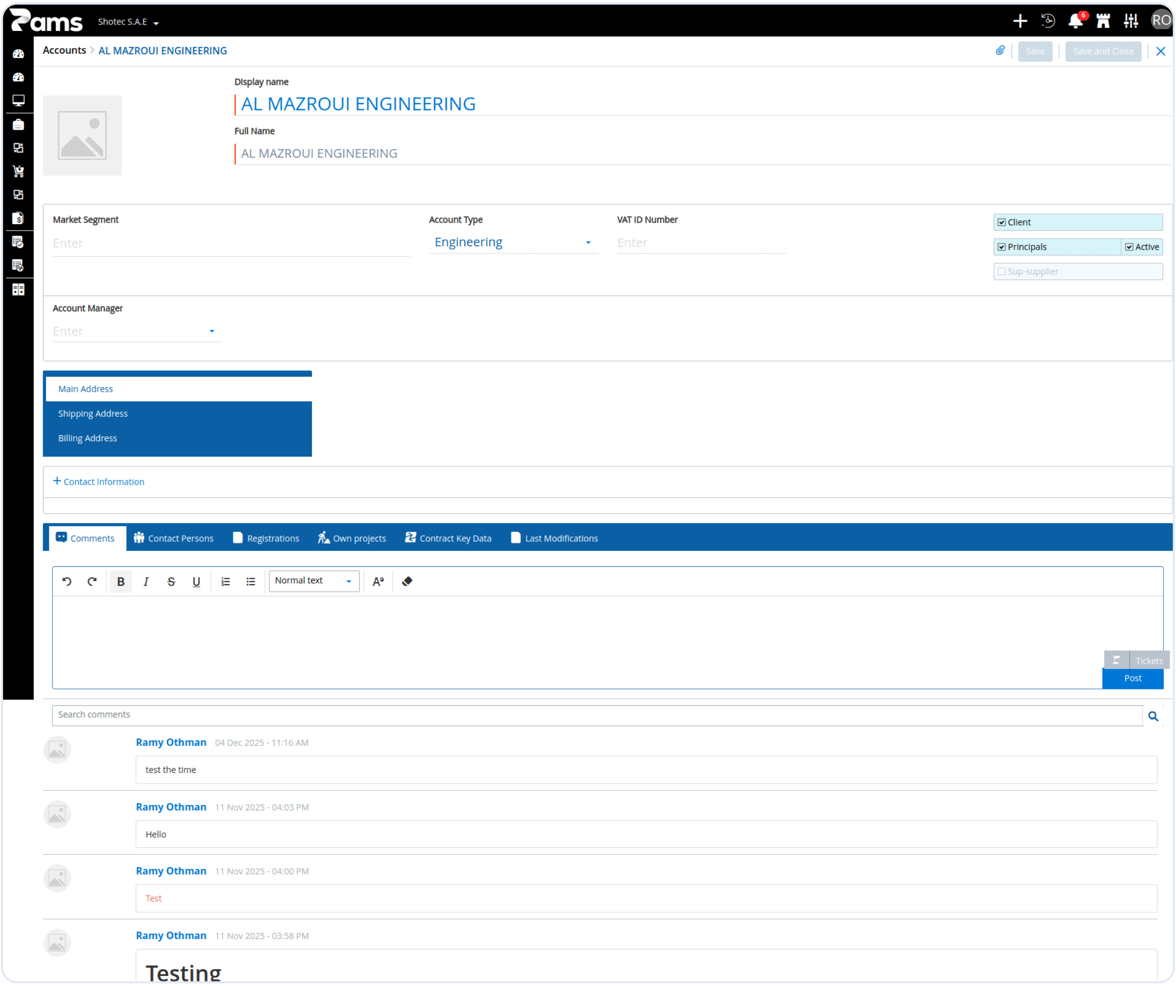
Review the account record before making changes. Use **Display Name** as the account's visible name and **Full Name** where the complete name is required.

> **Note:** No account status or approval stage is available on this screen. The record remains available for revision until you save your changes.

2. Decide whether you are updating the account identity or its additional details.
   - To update the account identity, enter or revise **Display Name** and **Full Name**.
   - To record additional information shown on the account form, complete **Title**, **Name **, **Position**, and **Department** as applicable.
   - Review **Selected items** when the record includes selected information.
   - Use **Select...** and **Select** when you need to choose an available item for the record.

   Keep names consistent with the terminology used by your Sales, PM, Purchasing, Warehouse, and Finance teams so that the account can be recognized in related business work.

3. Decide whether the account requires written notes or collaboration details.



accounts

Select **comments** to work with account comments. Use **Search comments** to locate text within the available comments before adding or reviewing information.

When entering text in the available text area, use the formatting controls only where they improve readability:

- **Bold** for emphasis.
- **Italic** for secondary emphasis.
- **Strikethrough** for text that should remain visible but no longer apply.
- **Underline** where required by your documentation practice.
- **Ordered List** for sequential points.
- **Bullet List** for non-sequential points.
- **Header** for a text heading.

> **Tip:** Use comments for concise operational context, such as an account-specific purchasing or project follow-up. Keep key account names and formal identifying information in their dedicated fields.

4. Decide whether supporting files are needed.

   Use **files[]** to include the files available for the account record. Before saving, confirm that the account name, written content, selections, and files relate to the same business relationship.

   If you need to reverse a recent editing action before saving, select **Undo**. If you reverse an action unintentionally, select **Redo**.

   > **Warning:** Review changes before saving. The screen provides **Undo** and **Redo** for editing actions, but no separate account lifecycle state is shown for review or approval.

5. Choose how to finish the update.

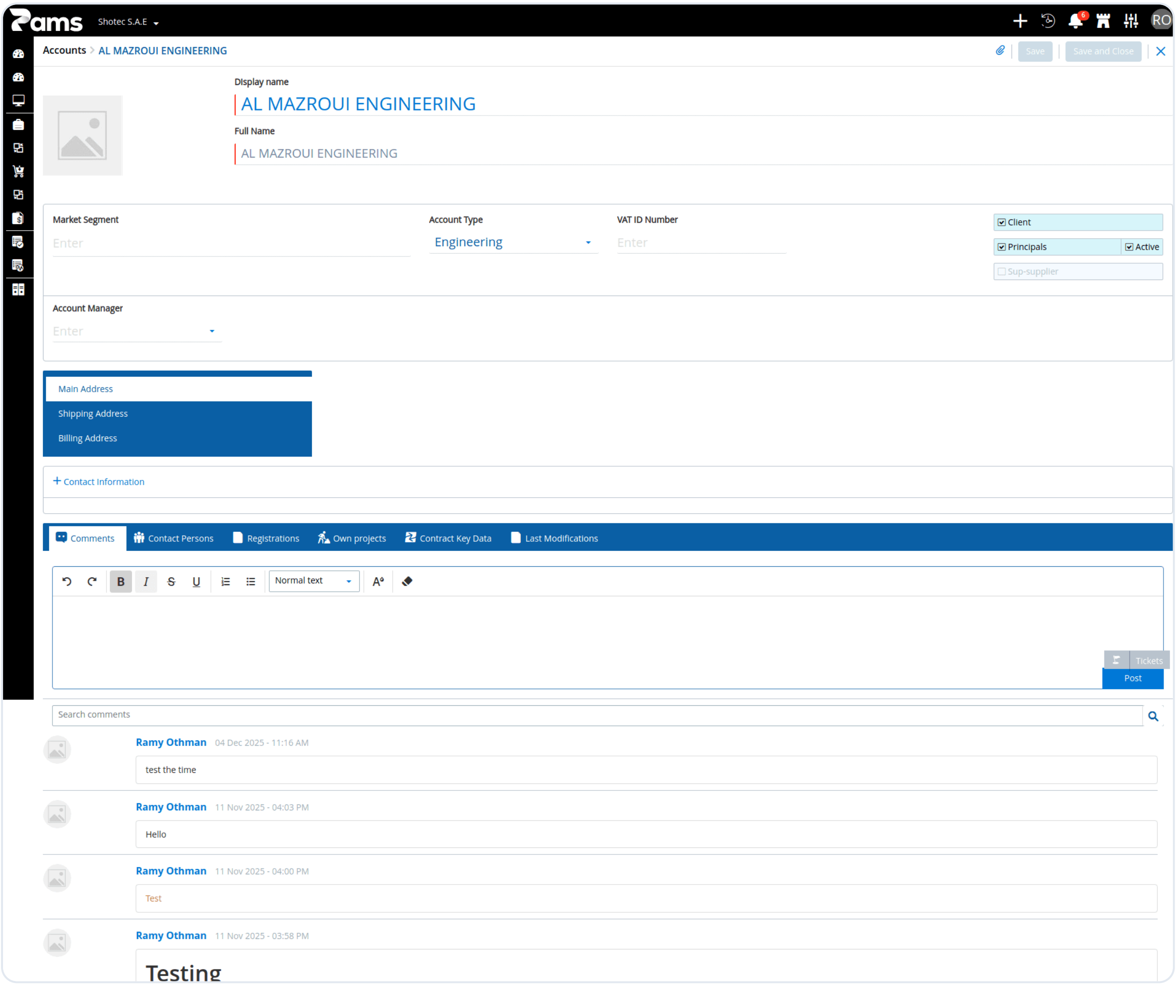
   - Select **Save** when you want to save the current account changes and continue working on the record.
   - Select **Save and Close** when the account update is complete and you want to save it before closing the record.

   The saved account can then be used as a maintained business-relationship record when working in areas such as Sales, PM, Purchasing, Warehouse, and Finance.

Examples

A sales representative needs to update an account after receiving revised contact information from a customer.

1. Open **Accounts** and locate the relevant account record.



accounts

2. Update **Display Name** with `Northstar Building Supplies` and enter `Northstar Building Supplies Limited` in **Full Name**.

3. Complete the available additional details:

Field	Example value
Title	Ms.
**Name **	Elena Ward
Position	Commercial Manager
Department	Sales

4. Select **comments** and add a short note stating that commercial correspondence should be directed to the Commercial Manager. Use **Header** only if the comment includes multiple clearly separated topics; otherwise, keep the note brief.
5. Use **files[]** to include the relevant supporting document, if one is available. Review the selected content through **Selected items** where applicable.
6. If a wording change is incorrect, select **Undo**. If the prior wording was correct, select **Redo**.
7. Select **Save and Close** to store the updated account and finish the task.

Tips

> **Tip:** Use **Display Name** for the recognizable account name and **Full Name** for the complete business name when both are available.

> **Note:** Use **Search comments** before adding a new comment to avoid repeating information already recorded on the account.

> **Warning:** Select **Save** or **Save and Close** after editing. Formatting, comments, selected items, and account details should be reviewed together before you finish.

Troubleshooting

Symptom	Likely cause	Fix
The account name does not appear as expected.	**Display Name** or **Full Name** was not completed or was entered incorrectly.	Review both fields, correct the required name information, and select **Save** or **Save and Close**.
A recent change should not have been made.	An editing action was applied to the record content.	Select **Undo** before saving. Select **Redo** if you need to restore the reversed change.
An existing comment cannot be located.	The comment list contains multiple entries or the relevant wording is not visible.	Use **Search comments** with a distinctive word or phrase from the comment.
The account update is not retained after leaving	The record was closed without using a save action.	Reopen the account, re-enter the required changes, and select **Save** or

Symptom	Likely cause	Fix
the record.		**Save and Close**.

Related pages

- Market — Overview
- All
- Market — Learning Path
- Principals
- Projects
- Sub Suppliers