

Configure Accounts



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Accounts >



Display name

Display name

Full Name

Full name

Market Segment

Enter

Account Type

Enter

VAT ID Number

Enter

Client

☒ Client
 ☐ Principals
 ☐ Active
 ☐ Sub-supplier

Account Manager

Enter

Main Address

Shipping Address

Billing Address

Destination Title

Destination Title

Country

Country

State

State

City

City

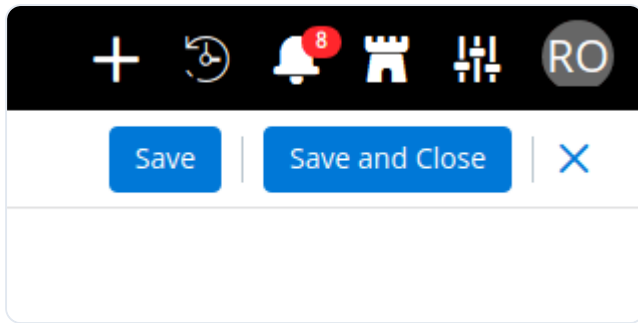
Street

Street

Zip-code

Zip Code

+ Contact Information



Overview

Use the **Accounts** page to configure an account record in the application. Administrators use this page when adding or maintaining account information available to business processes. The account form validates required information and input formats before it saves the record.

Before you start

Ensure that you have access to **Add new > Accounts > Accounts**. Prepare the account information required by your organization before starting the configuration.

Steps

1. Navigate to **Add new > Accounts > Accounts**.
2. Enter the account information on the **Accounts** form. Complete all fields required by the form and provide values in the required format where applicable.
3. Select **Save** to validate and save the account configuration.
4. To save the account configuration and leave the page, select **Save and Close**.

Warning: The form validates required information before saving. The account configuration is not saved until validation is successful.

Note: Five fields on the form require values in a specific format. Correct any format errors before selecting **Save** again.

Warning: If you leave the page with unsaved changes, the application displays a warning first. Save the configuration before navigating away if you want to retain

the changes.

Troubleshooting

Symptom	Likely cause	Fix
The account configuration does not save.	One or more required fields are incomplete.	Complete the required information and select Save .
A value is not accepted in the form.	The field requires a specific input format.	Correct the value to the required format, then select Save .
A warning appears when leaving the page.	The account configuration contains unsaved changes.	Select Save or Save and Close to retain the changes, or continue leaving the page if the changes are not required.

Result

The account configuration is validated and saved in **Accounts**.

Related pages

- [Configure Contacts](#)
- [Configure Products](#)
- **Add New User — Learning Path**
- [Add New User — Overview](#)
- [Getting Started with Add New User](#)