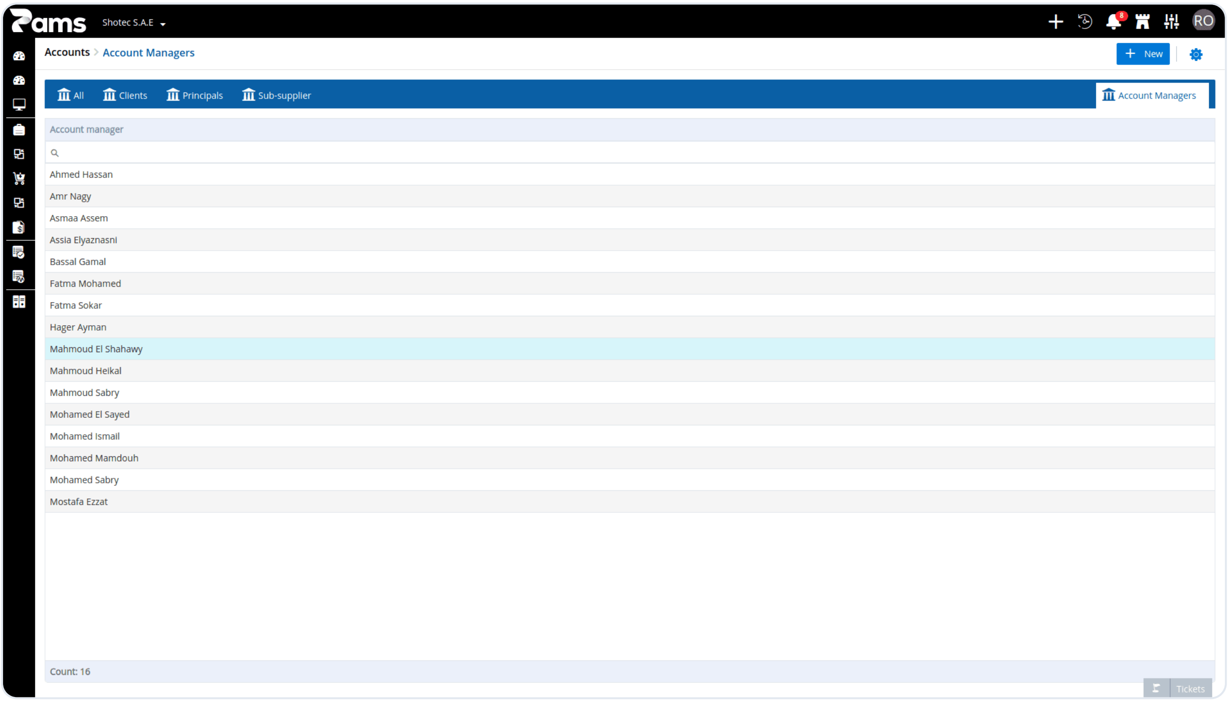
Account Manager

August 8, 2026

Account Manager

Applications › Market



Account Manager

Overview

Use the Account Manager view in Market to work with account manager records and to access the available account categories. This page is relevant when you need to review the account management area and choose whether to work with client or principal accounts.

Workflow

1. Open the Account Manager view in the Market application.

2. Review the account manager records displayed in the view to identify the relevant account manager.
3. Decide which account category you need to work with:
   - Select **Clients** to open the client-related category.
   - Select **Principals** to open the principal-related category.
4. When you need to continue work in another operational area, select the appropriate application control, such as **Sales**, **PM**, **Purchasing**, **Warehouse**, or **Finance**.

> **Note**
> Use **My Desk** when you need to return to your personal work area.

Tips

> **Tip**
> Select **All** when you need to return to the full available set of records or categories.

> **Tip**
> Use **Reports** to access reporting functions related to the available Market information.

Troubleshooting

- **Symptom:** You cannot locate the required account category.
  Likely cause: The relevant category has not been selected.
  Fix: Select **Clients** or **Principals**, depending on the account type you need to review.
- **Symptom:** You are working in the wrong operational area.
  Likely cause: A different application module is required for the next activity.
  Fix: Select the appropriate module, such as **Sales**, **PM**, **Purchasing**, **Warehouse**, or **Finance**.

Related pages

- Sub Suppliers
- Market — Learning Path