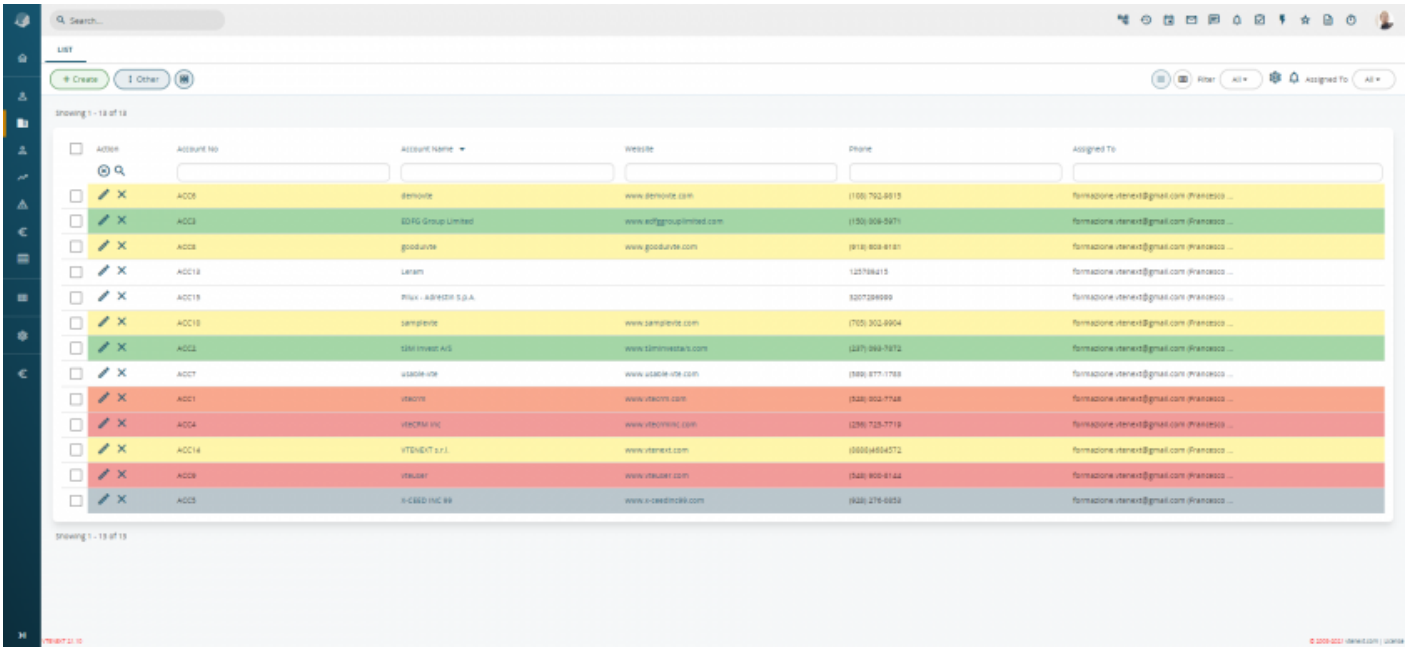
3.2 Accounts

The accounts module contains the records concerning the corporate titles of:

- **Customers**;
- **Potential customers** with a potential and a quote already created and related;
- **Others**: partners, resellers, distributors, partners, other sites, etc.

It is preferable to create a new company from a lead as described above; however it may sometimes be necessary to add a new account directly. In this case, always click on the 

button.

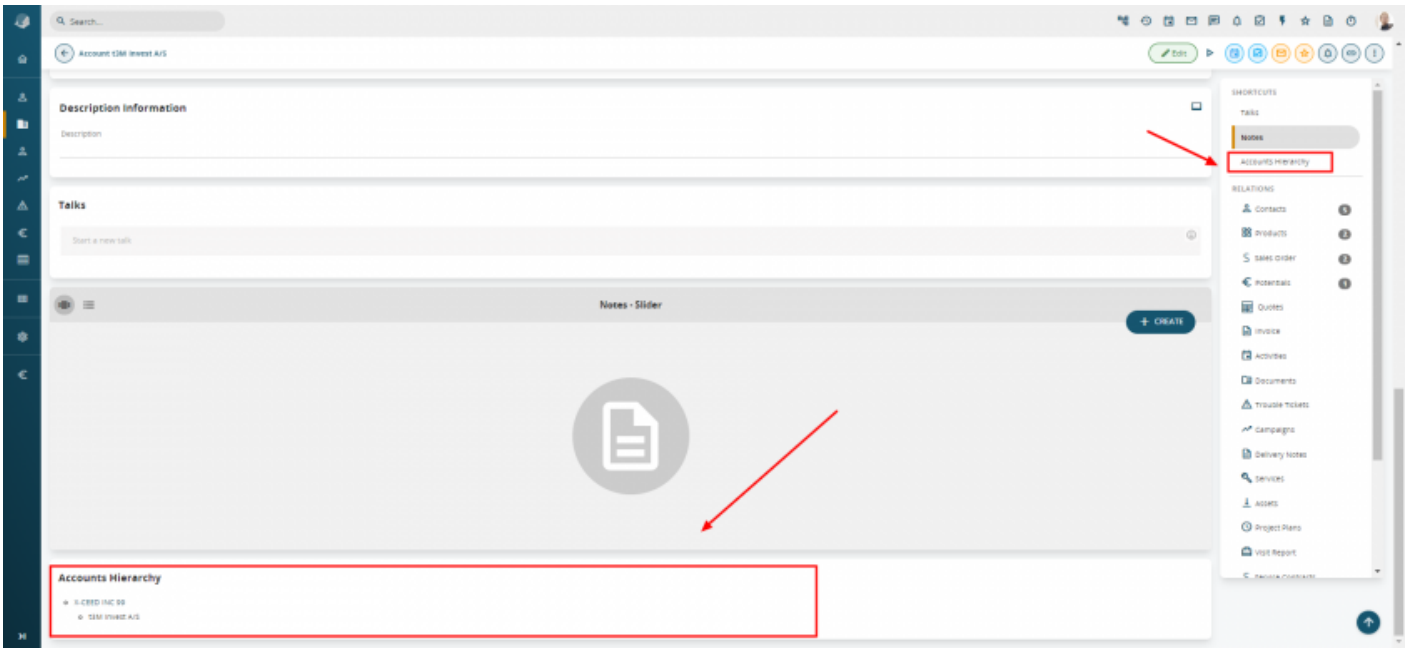


The fields logic is as described for the Leads module. A selection of the main fields in Accounts is shown below:

Account Name	Business name.
Member of	Manages a hierarchy between companies by interrelating the account being created with another account present in the CRM.
External Code	Indicates the customer code of the company on another system (e.g. generated by an ERP application). This field is subject to a uniqueness check.
Assigned to	User or group of users that manage the account.

The **Member of** field makes it possible to create hierarchical relationships among account records in the event that:

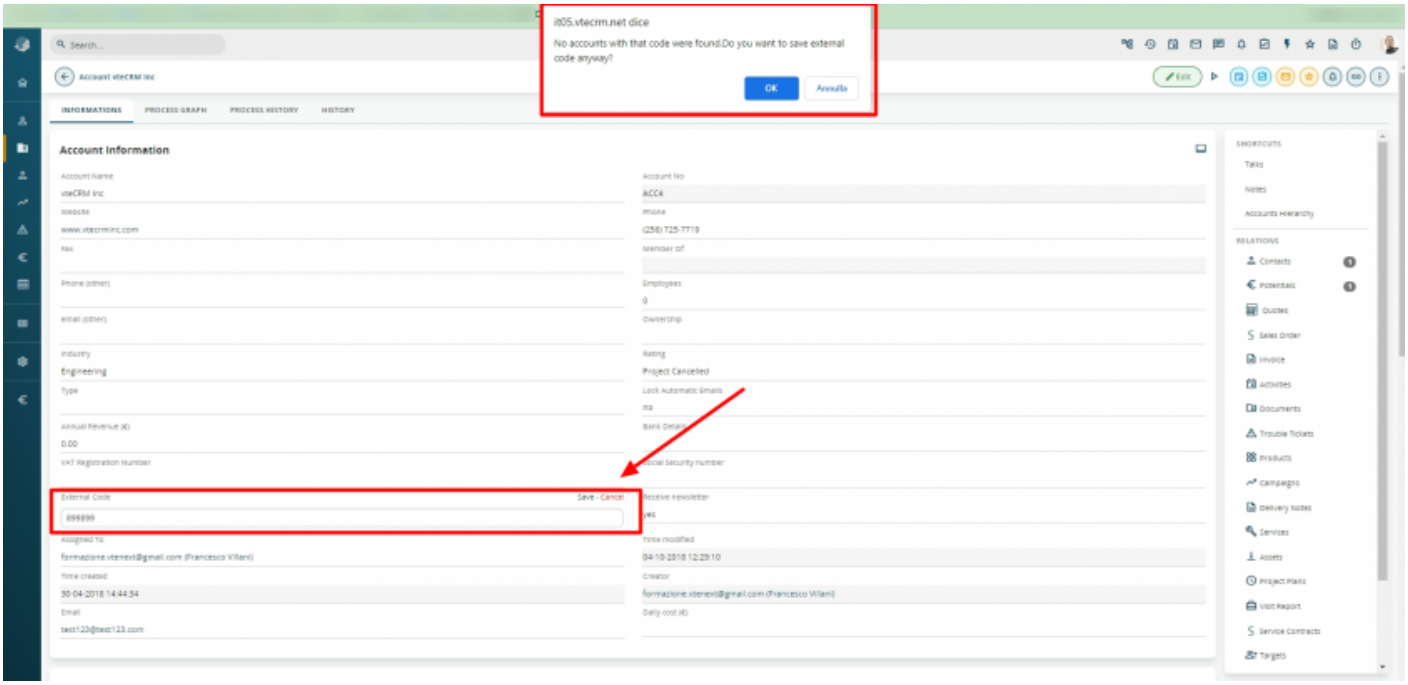
- there is a group of accounts with a parent company and N subordinate accounts;
- there is an account with a registered office and N operating sites;
- the invoicing customer is related to the target customer.



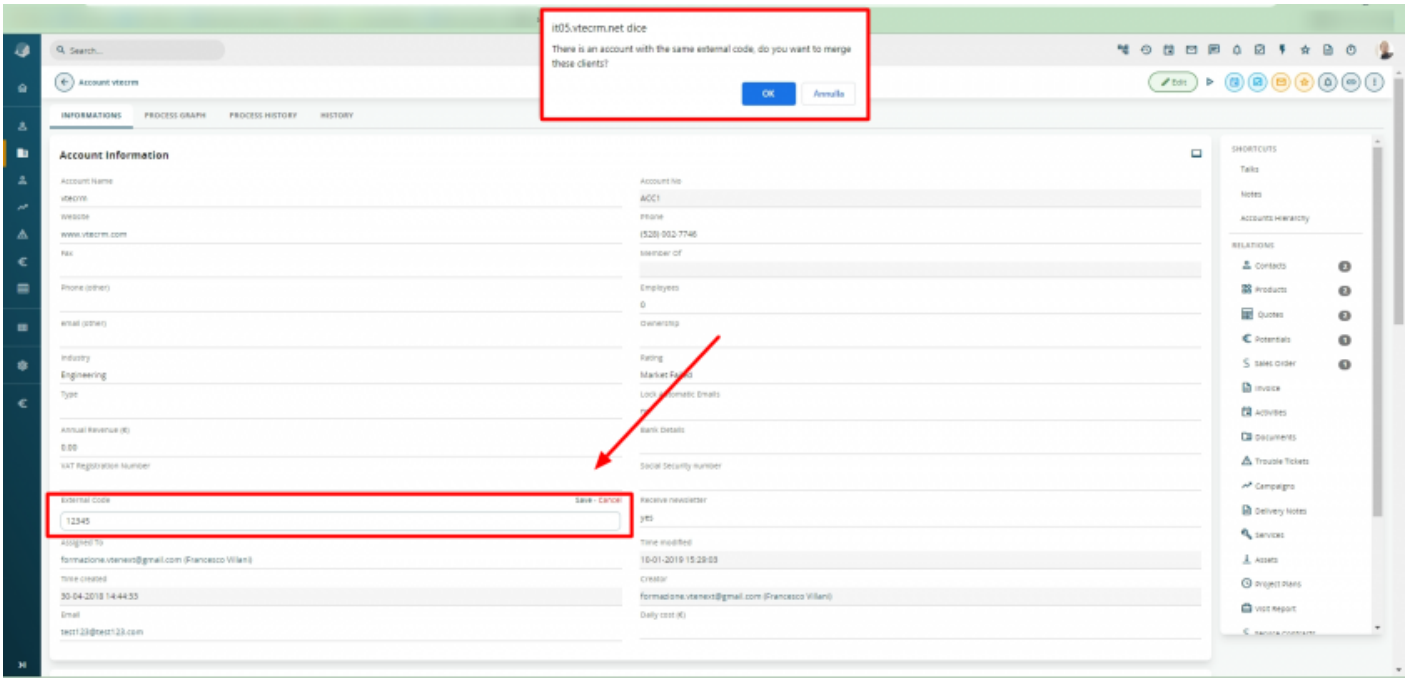
In this case, the hierarchy of companies is represented by means of a simple diagram at the bottom of the record. In the example shown in the diagram, ARCA S.S.D.A.R.L. is part of the 3Mb S:R:L: Mec Store group. By means of the links, you can open the records of the various accounts.

The **External Code** field typically contains the code associated with the account imported from the management system connected to the crm. Its behaviour is determined in two stages.

When the **code is not present in the crm**, a popup notification saying “No accounts with that external code were found. Do you want to save the external code anyway?” appears.
If at this point you decide to save, in case of “Account creation”, the Client entity will be created, while in case of “existing Account modification”, only the External Code field will be updated.



When instead **the code is present in the crm**, a different popup saying “There is already an account with the same code assigned to other users. So you can’t merge it” appears. In this case, there is no possibility to create or to modify an Account in order to avoid doubles coming either from data imported by the connected management system, or incorrect typing.



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