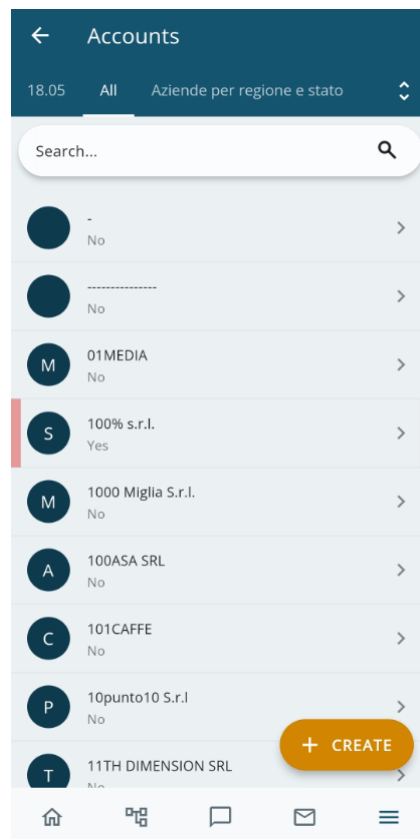


## 3.4 Accounts

As with the Leads, the Companies are also organized with filters and information cards (address, description, etc.). The relations menu at the top right gives access (and allows additions) to various correlated data items.

For example, from the Companies module it is possible to progress to the next stage of the sales cycle, creating a potential automatically correlated with the account information.



*List view showing filter applied App side (fields displayed below each record)*

CSB SOFTWARE & SOLUTIONS SRL

Account

Account Information

Account Name

CSB SOFTWARE & SOLUTIONS SRL

Member Of

Account > SISTEMI S.p.A.

Account No

ACC7406

Business Unit

VTENEXT

CLIENTE BLOCCATO

DATA BLOCCO

Type

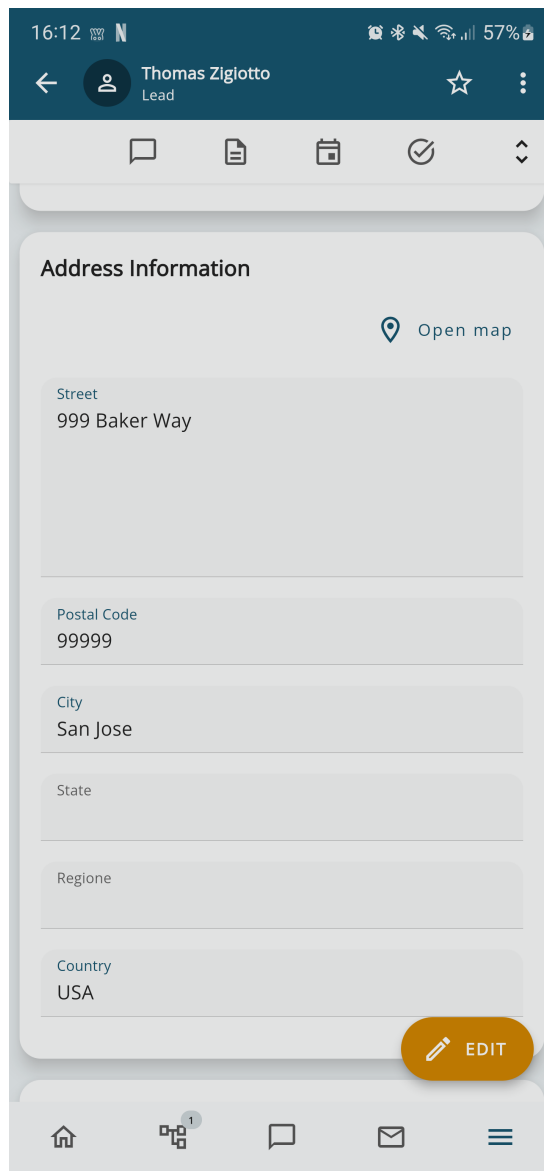
Potenziale Rivenditore

Phone

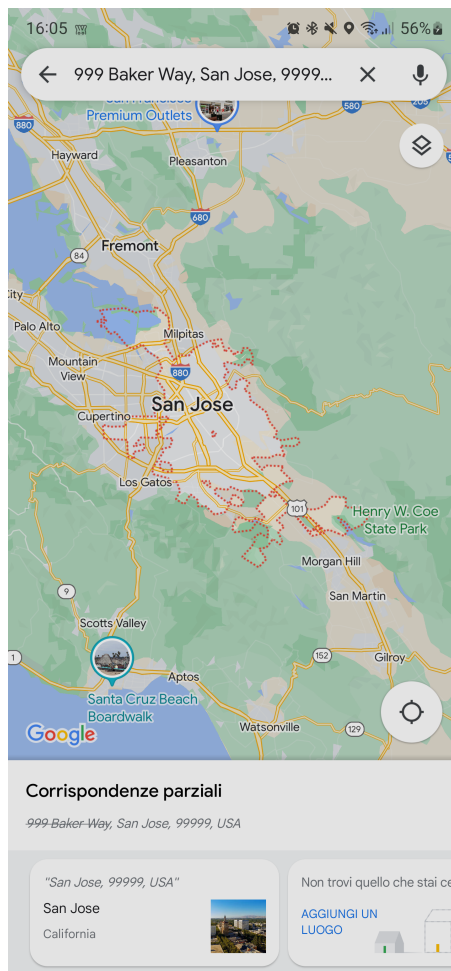
0303514611

EDIT

Account detail view



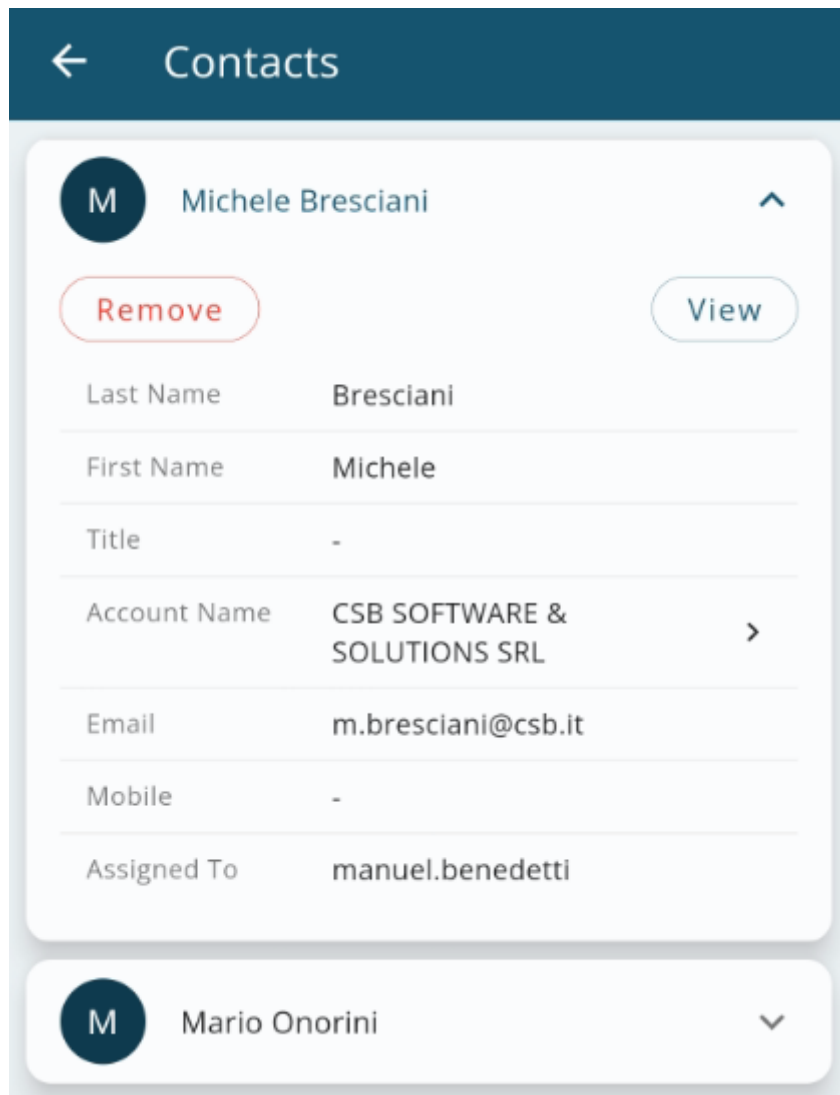
There's a '**Open Map**' button that allows you to open Google Maps and locate the Account



Organizational layout of the modules related to Companies		
Conversations	Notes	PDF Maker
Activities (Calendar)	Tasks (Calendar)	Products
Contacts	Messages	Sales Order
Trouble Tickets	Potentials	Quotes
Services	Documents	Invoices
Installations	Projects	Project Tasks
Service Contracts	Processes	DDT
Visit Reports		

You can also modify or eliminate the correlated data, for example (as in the figure) the Contact associated with the account. The arrow icon (top right) gives direct access to the Contacts page.

**N.B.:** The order and presence of related items can be modified in the mobile editor layout (configurable web side).



*Display of a Contact related to a Company*

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Revision #4

Created 11 July 2022 13:06:27 by Admin

Updated 29 August 2023 14:13:57 by Thomas