Creatio Academy

Accounts and contacts

Create an account

Version 7.18

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Create an account

PRODUCTS: ALL CREATIO PRODUCTS

All information about customer companies, partners, contractors or suppliers, or competitors in Creatio is stored in one place, up-to-date, and easily accessible at any time.

Use the [*Accounts*] section of Creatio to keep a record of contact data, track connections between companies, group companies by various criteria, and analyze the relevant statistics. For example, the data on the number of employees can be used to estimate the size of the company.

Note. The term “account” corresponds to “legal entity” in Financial Services Creatio products. Legal entities include customer companies, partners, competitor banks, subsidiaries, and branches of your bank, as well as insurance companies that you interact with. The [*Accounts*] section corresponds to the [*Legal entities*] section in Financial Services Creatio products.

In Creatio, an account can be:

- added manually
- imported from Excel
- saved manually or automatically during lead qualification (available in Sales Creatio and Marketing Creatio)

To add a new account record:

1. Open the [*Accounts*] section.
2. Click [*New account*].
3. In the opened window, fill out the account profile:

Name	The official name of the company. The field is required.
Primary phone	The primary phone number for contacting this company.
Primary contact	Name of the main contact person for the account, for example, the manager that you work with.
Web	Company web-site.

4. Click [*Save*].
   As a result, the contact record will appear in the section list. To add more account data, select the record in the section list, and click [*Open*].
5. On the page that opens, add a logo of the account to display on the account page, the section list, and the feed. To add a logo, click and upload the photo using the standard file selection window. We recommend uploading a square image (aspect ratio: 1:1). Click to remove the photo. If you mouse over the photo area,

the buttons will become visible.

6. Provide the account data on the record page:

Type	Type of the account depending on its relations with your company, such as “Customer”, “Partner” or “Supplier.” The account types can be used for filtering in other fields, so we do not recommend deleting the values from the [*Account types*] lookup.
Owner	The Creatio user, responsible for working with the account.
Category	The category of account defines how important the account is for your company. For example, “A“ – top importance, “D“ – low importance.
Industry	The field that the account operates in, for example, “IT company,” “Business services,” or “Manufacturing and distribution.”
Price list	A personal price list is used for orders where the current account is the customer. By default, the [*Price list*] field is hidden on the account page. You can add the field to a record profile or any of the record tabs (e.g., the [*General information*] tab), using the Section Wizard. Learn more about adding fields to record pages in the “Set up page fields” article. You can find the values for the [*Price list*] field in the [*Price lists*] lookup. The prices for each price list are specified in the [*Prices*] detail of the [*Prices and availability*] tab on the product page. Learn more about using price lists in the “Manage prices” article. The field is available in Sales Creatio, commerce edition, and Sales Creatio, enterprise edition.

7. Populate the following fields on the [*General information*] tab:

Alternate names	Aliases or additional names of the account, for example, the abbreviation of the company name.
Company code	Code number of the account. It is used to distinguish companies with identical names. The account number is non-editable and is filled in automatically based on the specified template. Use the “Account number mask” system setting to customize auto numbering for the accounts.

8. Specify more information about the account on the [*Categorization*] detail. The detail fields are displayed when you select the corresponding commands in the + menu.

No. of employees	The approximate number of employees in the company, for example, “51–100” or “501–1000.”
Business entity	Type of legal entity of the company, for example, “LLP”, “Ltd.”, or “Inc.”
Annual revenue	Possible annual revenue ranges for companies, for example, “15–20 million” or “20–30 million.”

9. Specify the addresses and communication options of the contact. Learn more in the “[Manage contact communication options]” article.
10. Specify the payment details of the company on the [*Banking details*] detail. The detail fields are displayed when you select the corresponding commands in the + menu.

<table>
<tr><td>Account</td><td>Name of the company whose banking details are given. This is a non-editable field.</td></tr>
<tr><td>Opportunity name</td><td>Name or type of the account's banking information, for example, the “Main account.”</td></tr>
<tr><td>Manager</td><td rowspan="2">Names of the chief accountant and CEO of the company.</td></tr>
<tr><td>Chief accountant</td></tr>
<tr><td>Country</td><td>Country of the banking details for the account If the selected country has a specific template for banking details in the [Countries] lookup, then this template will appear in the [Banking details] field.</td></tr>
<tr><td>Banking details</td><td>Complete information on the account's banking details, for example, account number, SWIFT number, ABA Code, etc.</td></tr>
<tr><td>Description</td><td>Additional information about the banking details,</td></tr>
</table>

11. Add dates important for the account on the [*Noteworthy events*] detail. The detail fields are displayed when you select the corresponding commands in the + menu.

Type	Type of the noteworthy event, for example, “Company day.” Defined when a record is added. You can change it afterward.
Date	Date of the noteworthy event.

12. Navigate to the [*Contacts and structure*] to add information about the contact persons of the company and the organizational structure.
    a. To add information about the structure and departments of the company, click + on the [*Organization*

structure] detail and select one of the two options: [*Add root item*], for example, a company department, or [*Add subordinate item*], for example, a subordinate unit within a department.

Account	Name of the company for which the organizational structure is established. This is a non-editable field.
Part of	The division includes a specific department. This is a non-editable field. It is only displayed on the page of the division that has a parent element.
Division	Name of the company division. If you select a value in the [*Division*] field, this field will be populated with the selected value.
Department	Name of the company department.
Manager	Name of the division manager.
Notes	Additional information about the division.

b. To add a new contact person to the account, click +
on the [*Contacts*] detail. As a result, a new contact page will open with the current account specified in the [*Account*] field. Once the page is saved, the [*Job experience*] detail will display the record about the contact's new place of work.

13. Navigate to the [*Relationships*] tab to add relationships between the selected account and other accounts and contacts. Learn more in the “Create connections between companies and accounts” article.

14. Click [*Save*].

As a result, a new account record will be added to Creatio. Update the account information at any moment, for example, via data enrichment.