**Guidance on creating Accounts**

The determining factor should be: is the client big enough that it is easier to handle as multiple accounts, or is it too small (either in size or in the amount of work we anticipate) to need multiple accounts. Enter separate accounts only for divisions with whom we will contract. Fewer accounts make it easier for an account manager to get a good overall picture of a client and make it easier for users to choose the correct account to attach to a new opportunity.

**Municipal Accounts**

Separating a city government into multiple accounts is not necessary for smaller cities, but for a large city with multiple departments, it is usually a good idea. Each major department has its own contacts and may have a different AECOM account manager. The tradeoff is that it might be hard sometimes for admin users to know which account to select.

For a large city, create one account for (e.g.,) **Edmonton, City of** and then use that account as the parent.  That links them together, and also gives users a place to put the opportunities they are unsure of.

Note: The overall account manager (or someone acting that capacity) should occasionally check the opportunities under the parent account and move any of them that belonged to one of the departments.  The opportunities that don’t belong to a major department (big enough to need a separate account) should stay under the parent account.

Each department should only be entered once, even if it has multiple addresses. The contacts at that department can have the alternate addresses but the department account itself can have either its main address or no address.

**Provincial, State, and Federal Government Accounts**

The municipal account philosophy applies, except that separate accounts should be created for major geographic divisions. See account naming conventions document.

**Industrial and Commercial Clients**

There is no need to enter every address for a commercial or industrial client. Enter separate accounts only for separate divisions with whom we will contract.

**Note:** The main account associated with an opportunity is the ultimate client or owner. If we are contracting with a concessionaire or a prime contractor, those accounts should be entered as partners with their specific roles.