

## **MPR Id- 486959(Account Creation)**

**Problem Statement-** Request to create a new Account with following details:

- **Account Name:** Nuvama Wealth & Investment limited Account
- **Owner:** Lakshya Mundra
- **Territory:** SAARC
- **Address:** 8th Floor, 801-804, Wing A, Building No. 3, Inspire BKC, G Block, Bandra Kurla Complex, Bandra East, Mumbai 400051
- **Website:** <https://www.nuvama.com/>
- **Parent Account:** Edelweiss Securities Limited which needs to be renamed as “Nuvama Wealth Management Limited (NWML)”
- **Parent Account ID:** 00039667

### **Solution:**

1. Go to Account object and go to account id 39667 and from Related Child Account
2. click on New.
3. Enter the above details in the relevant as shown in the screenshot:
4. Keep the Legal Account Name the same as Account Name.

The screenshots show the 'Prospect Customer' form in a CRM application. The top screenshot displays the 'Prospect Account' tab, showing fields such as Name (NUVAMA Wealth & Investment limited), Owner (Lakshya Mundra), Website URL (https://www.nuvama.com/), and Subsidiary (Edelweiss Solutions Private Limited). The bottom screenshot displays the 'Contact Information' tab, showing fields for Billing Address (8th Floor, 801-804, Wing A, Building no. 3, Inspire BKC, G Block, Bandra Kurla Complex, Bandra East, Mumbai 400051), Contact Person (Name: Lakshya Mundra, Title: Manager, Email: compliance@nuvama.com), and various phone numbers (Mobile: 986980725, Office Phone: 40096400, Fax: 40096400).

5. After filling in the details click on Save and check the account's details.
6. Account Id- 66257

