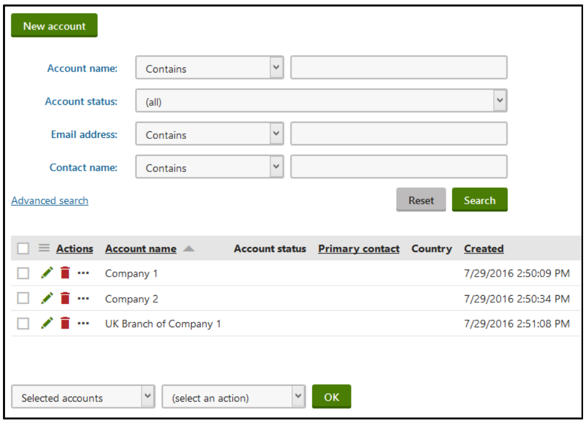
Accounts represent organizations, i.e. companies or other commercial or non-commercial bodies. You can use accounts to categorize your contacts based on their affiliations. You can create accounts as subsidiaries of other accounts.

## Managing accounts

You can manage accounts on the **Accounts** tab of the **Contact management** application:




Click **New account** to manually create new accounts.

When editing an account, you can fill in the following default fields on the **General** tab:

| Section | Fields |
|---|---|
| General | • **Account name**<br>• **Account status** – allows you to select an account status.<br>• **Subsidiary of** – you can set the account as a subsidiary of a different account.<br>• **Account owner** – you can select a user responsible for managing the account. |
| Address | • **Address line 1**<br>• **Address line 2**<br>• **City**<br>• **ZIP code**<br>• **Country**<br>• **Phone**<br>• **Fax**<br>• **Email address**<br>• **Website URL** |

You can leave **Notes** about the account. Click **Insert timestamp** to insert your timestamp into the notes – the default stamp contains the full name of your user account and the current date and time.

**Adding custom fields to accounts**

If you need to store data for accounts in addition to the default fields, you can define custom fields:

1. Open the **Modules** application.
2. **Edit** ( ) the **Contact management** module.
3. Open the **Classes** tab.
4. **Edit** ( ) the **Contact management - Account** class.
5. Switch to the **Fields** tab.
6. Create a new field based on your needs.

You can view and edit the values of your new fields on the **Custom fields** tab of the account editing interface.

## Creating subsidiaries

You can organize accounts into a hierarchical structure of subsidiaries. Each account can have any number of child accounts as subsidiaries.

To set an account as a subsidiary of a different account:

1. Open the **Contact management** application on the **Accounts** tab.
2. **Edit** ( ) an account.
3. Select the parent account in the **Subsidiary of** field on the **General** tab.
4. Click **Save**.

You can view all subsidiaries of an account on the **Subsidiaries** tab of the account editing interface.

- Click **Add accounts** to set other accounts as subsidiaries of the edited account
- Click **View account details** ( ) to open the editing interface of individual subsidiary accounts
- You can **Remove** ( ) subsidiaries (does not delete the account itself, only cancels the subsidiary relationship between the accounts)

| Actions | Account name | Account status | Primary contact | Country |
|---|---|---|---|---|
| | UK Branch of Company 1 | | | |

## Assigning statuses to accounts

You can label accounts with statuses to reflect their relationship with your organization or to indicate how you perceive them from a marketing point of view.

You can create, rename or delete the statuses in the **Contact management** application on the **Configuration -> Account status** tab.

To set a status for an account:

1. Open the **Contact management** application on the **Accounts** tab.
2. **Edit** ( ) an account.
3. Select an **Account status** on the **General** tab.
    - Accounts can only have one status at a time.
4. Click **Save**.

The status appears in lists of accounts and you can use it when filtering.

## Adding contacts to accounts

To add contacts to an account:

1. Open the **Contact management** application on the **Accounts** tab.
2. **Edit** ( ) an account.
3. Open the **Contacts** tab.
4. Click **Add contacts**.
5. Select contacts.
6. (Optional) Select contact role for the contacts in accounts.
7. Click **OK**.

The **Contacts** tab shows a list of all contacts in the account.

- Click **View contact details** ( ) to open the editing interface of individual contacts.
- Click **Select contact role** ( ) to open the interface for selecting contact roles.
- You can **Remove** ( ) contacts from the account.

You can also view and manage the accounts of individual contacts on the **Accounts** tab of the contact editing interface.

**Tip**: You can create marketing automation processes that add or remove contacts to/from accounts.

**Primary and secondary contacts**

You can designate a primary and secondary contact for each account. For example, you can use these contacts to identify the company's CEO or any other relevant employee.

1. Open the account's **General** tab.
2. Select a **Primary** and **Secondary contact** from the list of the account's contacts.
3. (Optional) Set the contact roles of the primary and secondary contacts.
4. Click **Save**.

## Assigning contact roles to contacts in accounts

You can specify roles for contacts in accounts. Roles typically represent the job position or other type of competence that the contact has within the organization, such as *CEO*, *CFO*, *Decision maker*. Contacts can have only one role in each account.

To set roles for contacts within accounts:

1. Open the **Contact management** application on the **Accounts** tab.
2. **Edit** ( ) the account.
3. Open the **Contacts** tab.
4. Click **Select contact role** for specific contacts.
5. Select the role.
6. Click **OK**.

You can add roles to multiple contacts using the options below the list:

1. Select the contacts:
   a. *All contacts*
   b. *Selected contacts* - mark specific contacts using the checkboxes on the left side of the list.
2. Choose the *Select contact role* action.
3. Click **OK**.
4. Select the target contact role.

The roles appear in the account's contact lists.

**Tip**: You can also assign roles when editing specific contacts on the **Accounts** tab of the contact editing interface.

### Managing contact roles

Contacts in accounts can be assigned a role from a predefined set of contact roles. Each contact can only have one role in an account. You can create, rename or delete the roles in the **Contact management** application on the **Configuration -> Contact role** tab.

Click **New contact role** to create new roles.