

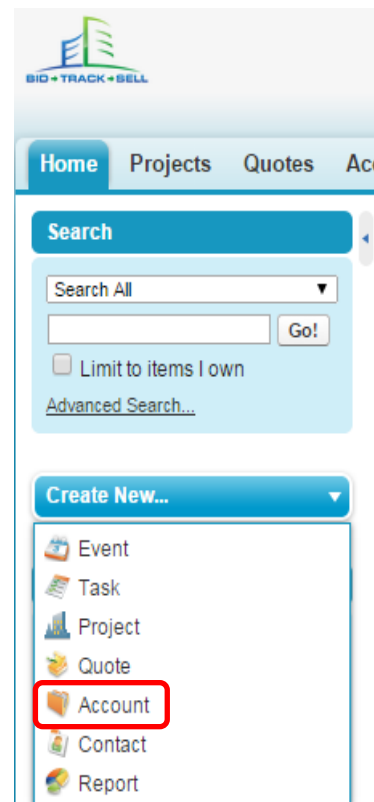
# Creating a New Manufacturer Account

Creating a new account: Please note there are two types of Accounts

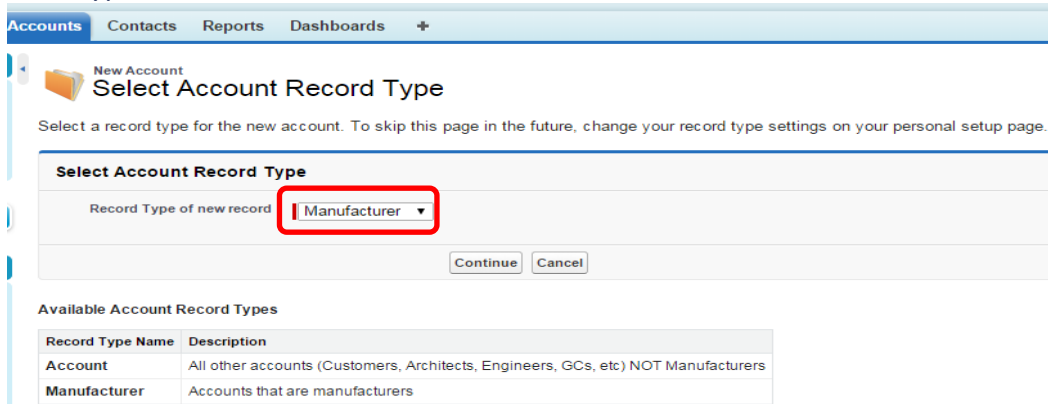
*Account:* These Accounts are your customers (Companies). These are the Accounts you market to or sell to.

*Manufacturer:* This is the manufacturer(s) of the products you represent to your Accounts

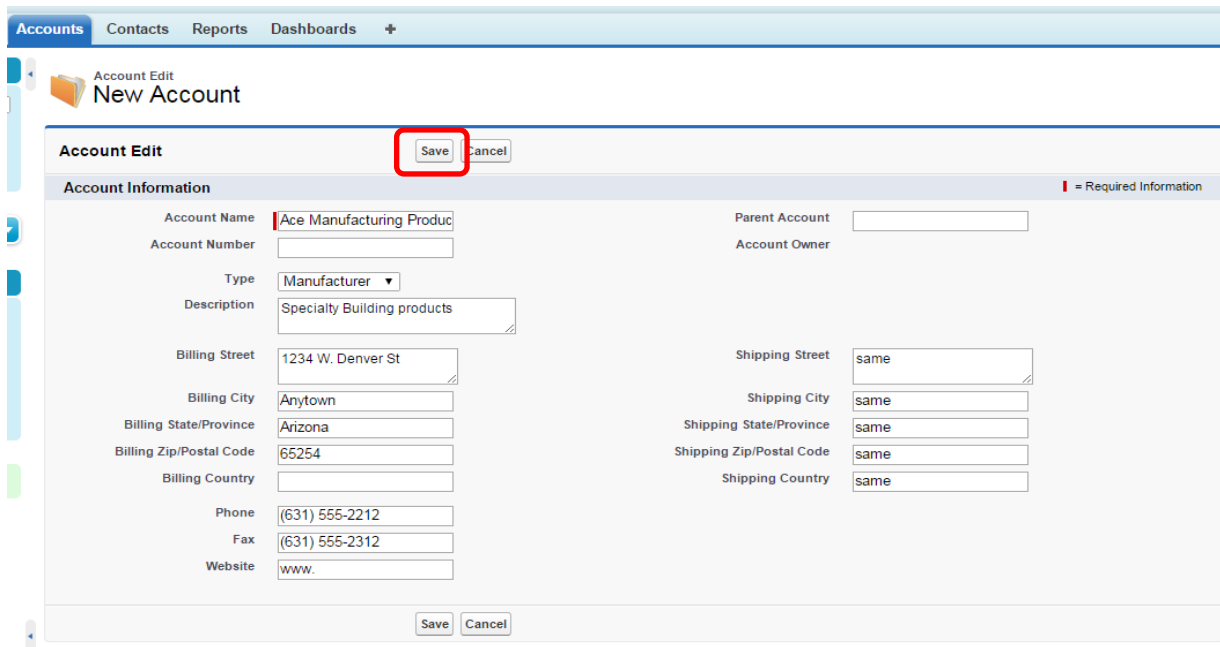
## 1. Create New Account



## 2. Record Type of new record select "Manufacturer" and then "Continue"



3. Fill in the fields as needed and click "Save"



**Accounts** | Contacts | Reports | Dashboards +

Account Edit  
New Account

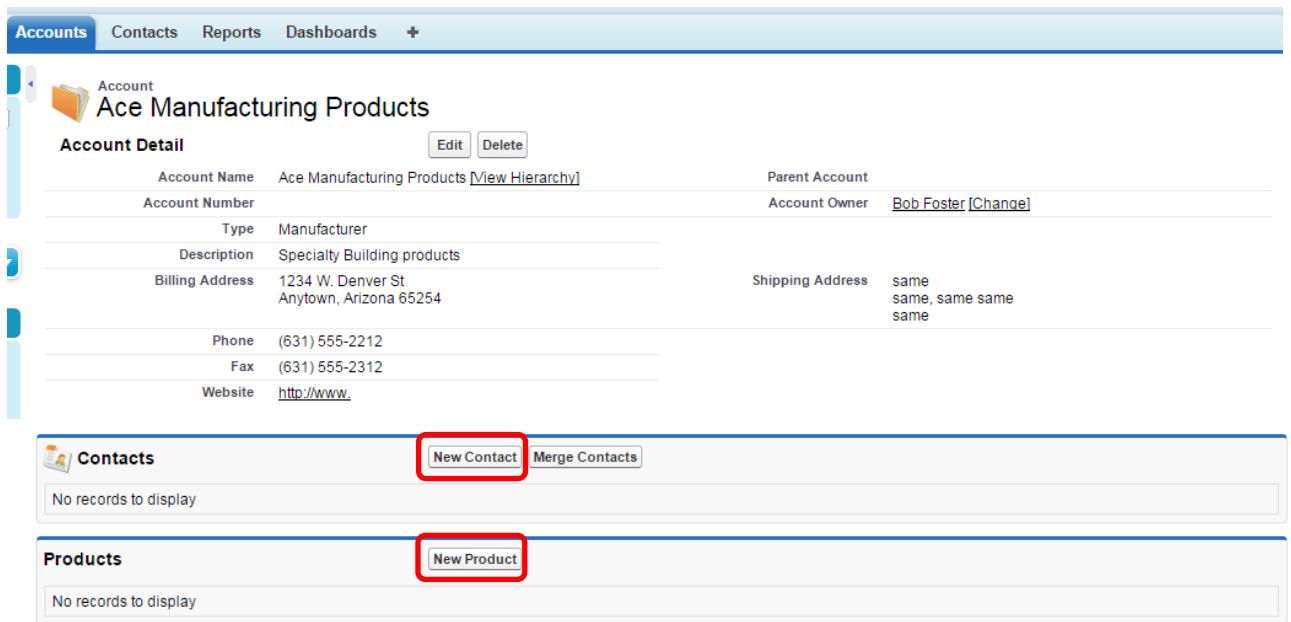
**Account Edit** Save Cancel

**Account Information** Required Information

Account Name	Ace Manufacturing Product	Parent Account	
Account Number		Account Owner	
Type	Manufacturer		
Description	Specialty Building products		
Billing Street	1234 W. Denver St	Shipping Street	same
Billing City	Anytown	Shipping City	same
Billing State/Province	Arizona	Shipping State/Province	same
Billing Zip/Postal Code	65254	Shipping Zip/Postal Code	same
Billing Country		Shipping Country	same
Phone	(631) 555-2212		
Fax	(631) 555-2312		
Website	www.		

Save Cancel

4. The next screen that appears allows you to add "Contacts" and "Products" associated with the manufacturer.



**Accounts** | Contacts | Reports | Dashboards +

Account  
Ace Manufacturing Products

**Account Detail** Edit Delete

Account Name	Ace Manufacturing Products <a href="#">View Hierarchy</a>	Parent Account	
Account Number		Account Owner	<a href="#">Bob Foster [Change]</a>
Type	Manufacturer		
Description	Specialty Building products		
Billing Address	1234 W. Denver St Anytown, Arizona 65254	Shipping Address	same same, same same same
Phone	(631) 555-2212		
Fax	(631) 555-2312		
Website	<a href="http://www">http://www</a>		

**Contacts** New Contact Merge Contacts

No records to display

**Products** New Product

No records to display

5. To add Contacts associated with a manufacturer select the "New Contact" button.

Accounts | Contacts | Reports | Dashboards +

Account  
**Ace Manufacturing Products**  
 Account Detail [Edit] [Delete]

Account Name	Ace Manufacturing Products <a href="#">View Hierarchy</a>	Parent Account	
Account Number		Account Owner	<a href="#">Bob Foster</a> [Change]
Type	Manufacturer		
Description	Specialty Building products		
Billing Address	1234 W. Denver St Anytown, Arizona 65254	Shipping Address	same same, same same same
Phone	(631) 555-2212		
Fax	(631) 555-2312		
Website	<a href="http://www">http://www</a>		

Contacts [New Contact] [Merge Contacts]

Action	Contact Name	Title	Email	Phone
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Jim Smith</a>		<a href="mailto:jims@acemnproducts.com">jims@acemnproducts.com</a>	(631) 555-2212
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Alice Jones</a>		<a href="mailto:alicej@acemnproducts.com">alicej@acemnproducts.com</a>	(631) 555-2212

Products [New Product]

Action	Model	Product Name
<a href="#">Edit</a>   <a href="#">Del</a>	Square	<a href="#">Building block</a>
<a href="#">Edit</a>   <a href="#">Del</a>	Cylinder	<a href="#">Building block</a>

a) Complete the fields and select the "Save" or "Save & New" button.

Contact Edit [Save] [Save & New] [Cancel]

Contact Information ! = Required Information

First Name	--None--	Phone	(631) 555-2212
Last Name		Mobile	
Account Name	Ace Manufacturing Product	Fax	(631) 555-2312
Department		Email	

Address Information [Copy Mailing Address to Other Address](#)

Mailing Street	1234 W. Denver St	Other Street	
Mailing City	Anytown	Other City	
Mailing State/Province	Arizona	Other State/Province	
Mailing Zip/Postal Code	65254	Other Zip/Postal Code	
Mailing Country		Other Country	

b) After you select the "Save" or "Save & New" button you will see the information as seen below. Repeat step a) for each Contact associated with the Account

Accounts | **Contacts** | Reports | Dashboards +

Contact  
**Jim Smith**  
 Contact Detail [Edit] [Delete] [Clone] [Request Update]

Name	Jim Smith	Phone	(631) 555-2212
Account Name	<a href="#">Ace Manufacturing Products</a>	Mobile	
Department	Estimating	Fax	(631) 555-2312
		Email	<a href="mailto:jims@acemnproducts.com">jims@acemnproducts.com</a>
Mailing Address	1234 W. Denver St Anytown, Arizona 65254	Other Address	

- To add Products associated with a manufacturer select the "New Product" button and complete the fields.

Accounts Contacts Reports Dashboards +

Product Edit Help for this Page ?

**New Product**

**Product Edit** Save Save & New Cancel

**Information** ! = Required Information

Product Name  Manufacturer Name

Model

Notes

**System Information**

Owner Bob Foster

Save Save & New Cancel

- After you select the "Save" or "Save & New" button you will see the information as seen below. Repeat step 6 for each Product associated with the Account

Accounts Contacts Reports Dashboards +

Account **Ace Manufacturing Products**

**Account Detail** Edit Delete

Account Name	Ace Manufacturing Products <a href="#">View Hierarchy</a>	Parent Account	
Account Number		Account Owner	<a href="#">Bob Foster [Change]</a>
Type	Manufacturer		
Description	Specialty Building products		
Billing Address	1234 W. Denver St Anytown, Arizona 65254	Shipping Address	same same, same same same
Phone	(631) 555-2212		
Fax	(631) 555-2312		
Website	<a href="http://www.">http://www.</a>		

**Contacts** New Contact Merge Contacts

Action	Contact Name	Title	Email	Phone
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Jim Smith</a>		<a href="mailto:jims@acemnproducts.com">jims@acemnproducts.com</a>	(631) 555-2212
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Alice Jones</a>		<a href="mailto:alicei@acemnproducts.com">alicei@acemnproducts.com</a>	(631) 555-2212

**Products** New Product

Action	Model	Product Name
<a href="#">Edit</a>   <a href="#">Del</a>	Square	<a href="#">Square block</a>
<a href="#">Edit</a>   <a href="#">Del</a>	Cylinder	<a href="#">Cylinder block</a>

- You can Add or Update this information at any time.