

# Add a New Account (Prospect)

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Pathway: Account > Add Account



Before adding a new account, consider searching for the account to verify one hasn't already been created. Otherwise, upon selecting Create Account the system will check for duplicates.

In the Add Account editor, accounts can be added either as an Active account or a Prospect account. This illustrates the process of creating a Prospect account to keep in the sales cycle for future follow-up. Review each section and minimally complete all required fields highlighted in red. Additional field information including logic and setup can be reviewed here: [Create Account: Screen Field Descriptions](#).

The screenshot shows the 'Add Account' form with the following details:

- STATUS:** Prospect
- SOURCE:** Cold Call
- ACCOUNT DIVISION:** HOUSTON
- SITE DIVISION:** HOUSTON
- ACCOUNT CLASS:** COMMERCIAL

**Service Address:**

- NAME: [Redacted]
- NAME 2: [Redacted]
- ADDRESS LINE 1: Enter a location (Red)
- ADDRESS LINE 2: [Redacted]
- CITY/STATE/POSTAL CODE: [Redacted]
- PHONE: [Redacted]
- WEBSITE: [Redacted]
- PO#: [Redacted]
- EPA: [Redacted]
- SIGNATURE REQUIRED:

**Billing Address:**

- Same as service address
- NAME: [Redacted]
- NAME 2: [Redacted]
- ATTN: [Redacted]
- ADDRESS LINE 1: Enter a location (Red)
- ADDRESS LINE 2: [Redacted]
- CITY/STATE/POSTAL CODE: [Redacted]
- PHONE: [Redacted]

**Contact Information:**

- CONTACT NAME: [Redacted]
- TITLE: [Redacted]
- CONTACT EMAIL: [Redacted]
- CONTACT PHONE: [Redacted]
- PHONE TYPE: [Redacted]
- BILLING CONTACT:

**Footer Fields:**

- SALES REP: House Account
- SITE CLASS: [Redacted]
- SERVICE REGION: HOUSTON OPEN MA
- TAX REGION: ITY-LIBERTY COUNTY

## Permissions

The following permissions are required to create a prospect account:

Permission ID	Permission Name	Description
2	Add Prospect Accounts and Sites	Allows for the creation of a prospect account or site.
5	View Account	Necessary to view the account after it is created and complete any additional setup.
60	Add Account	Displays the 'Add Account' option in the Accounts module.

## Create a Prospect Account

### Account Identification

The following section applies to the drop down fields located at the very top of the Create Account screen.

**CREATE ACCOUNT** ACCOUNTS > ADD ACCOUNT

STATUS: Prospect SOURCE: ACCOUNT DIVISION: SITE DIVISION: ACCOUNT CLASS:

**Service Address**

NAME: ADDRESS LINE 1: Enter a location ADDRESS LINE 2: CITY/STATE/POSTAL CODE: PHONE: (999) 999-9999 WEBSITE: PO#: EPA: SIGNATURE REQUIRED:

**Billing Address**

Same as service address

NAME: NAME 2: ATTN: ADDRESS LINE 1: Enter a location ADDRESS LINE 2: CITY/STATE/POSTAL CODE: PHONE: (999) 999-9999

1. Select the **Sales Rep** who is assigned to the account.
2. Select the **Site Class** if one applies.
3. Select the **Service Region**.
4. Select the **Tax Region**. If a region is not selected, the customer is considered tax exempt.

## Service and Billing Addresses

The following section details what fields must be completed in the Service Address and Billing Address sections.

**CREATE ACCOUNT** ACCOUNTS > ADD ACCOUNT

STATUS: Prospect SOURCE: ACCOUNT DIVISION: SITE DIVISION: ACCOUNT CLASS:

**Service Address**

NAME: ADDRESS LINE 1: Enter a location ADDRESS LINE 2: CITY/STATE/POSTAL CODE: PHONE: (999) 999-9999 WEBSITE: PO#: EPA: SIGNATURE REQUIRED:

**Billing Address**

Same as service address

NAME: NAME 2: ATTN: ADDRESS LINE 1: Enter a location ADDRESS LINE 2: CITY/STATE/POSTAL CODE: PHONE: (999) 999-9999

### Service Address:

1. Enter a **Name** for the account.
2. Enter the address for the service location in **Address Line 1**. As you enter the address, the system will auto-suggest addresses based on what has been entered. Selecting from what is suggested will auto-fill additional address fields. If this is a business, entering the name of the business here will also initiate an address search.
3. Enter the **City/State/Postal Code**.
4. Enter a **phone** number for the location.
5. If a website is provided you may enter that in the Website field.
6. Select **Signature Required** if the driver must always get a signature.

### Billing Address:

1. If the billing address is the same as the service address, leave the **Same as Service Address** box checked. Otherwise, uncheck and continue to step 2.
2. Enter the **Name** the billing should be addressed to. As you enter the business name or address, the system will auto-suggest addresses based on what has been entered. Selecting from what is suggested will auto-fill additional address fields.
3. Enter who the mailing should be **ATTN** to.

4. Enter the mailing address in **Address Line 1**.
5. Enter a phone number if different than the phone number for the service location.

## Contact Information

The Contact section on the Create Account screen identifies the account contact and allows the user to also designate them as a billing contact. Additional contacts can be added to the account once the account has been created.

The screenshot shows the 'CREATE ACCOUNT' form with the following sections:

- Service Address:** NAME, NAME 2, ADDRESS LINE 1 (with a red 'Enter a location' prompt), ADDRESS LINE 2, CITY/STATE/POSTAL CODE, PHONE (with a dropdown for country and '(999) 999-9999'), WEBSITE, PO#, EPA, and SIGNATURE REQUIRED checkbox.
- Billing Address:** A checked checkbox 'Same as service address', followed by NAME, NAME 2, ATTN, ADDRESS LINE 1 (with a red 'Enter a location' prompt), ADDRESS LINE 2, CITY/STATE/POSTAL CODE, and PHONE (with a dropdown for country and '(999) 999-9999').
- Contact Information (highlighted with a red box):** CONTACT NAME, TITLE, CONTACT EMAIL, CONTACT PHONE (with a dropdown for country and '(999) 999-9999'), PHONE TYPE, and BILLING CONTACT checkbox.

1. Enter **Name** of the account contact.
2. Enter the **Title** or role of the contact (*optional*).
3. Enter the **Contact Email**. This is required if the account will be emailed invoices.
4. Enter the **Contact Phone** number and **Phone Type**.
5. Remove selection from **Billing Contact** only if this person IS NOT a billing contact

## Sales & Regional Information

The sales and regional information section identifies the account's sales representative and gathers geographic region details for tax calculations and applicable surcharges.

The screenshot shows the 'CREATE ACCOUNT' form with the following sections:

- Service Address:** Same as the first screenshot.
- Billing Address:** Same as the first screenshot.
- Contact Information:** Same as the first screenshot.
- Sales & Regional Information (highlighted with a red box):** SALES REP, SITE CLASS, SERVICE REGION (with a magnifying glass icon), TAX REGION (with a magnifying glass icon), and ORIGIN.

1. Select the **Sales Rep** who is assigned to the account.
2. Select the **Site Class** if one applies.
3. Select the **Service Region**.
4. Select the **Tax Region**. If no region is selected, the account is considered tax exempt.

## Create Account & Check For Duplicates

Upon selecting **Create Account**, the system will check for any duplicates. Review the list of returned results to verify a duplicate does not exist before proceeding any further.

- o **Duplicate Found:** If you identify a duplicate upon reviewing the results, choose the duplicate from the list, and you will be directed to the customer service screen of the selected account. This step ensures that a new account is not created.
- o **No Duplicate:** If upon reviewing the results a duplicate is not found, select the "Continue" button and the account will be created.

**CREATE ACCOUNT** ACCOUNTS > ADD ACCOUNT

STATUS: Prospect SOURCE: Call In ACCOUNT DIVISION: HOUSTON SITE DIVISION: HOUSTON ACCOUNT CLASS: COMMERCIAL

Service Address: NAME: Navusoft Commercial Enterprises ADDRESS LINE 1: 8100 Washington Ave ADDRESS LINE 2: Unit 2 CITY/STATE/POSTAL CODE: Houston TX 77007

CONTACT NAME: Aliena Somers TITLE: CONTACT PHONE: PHONE TYPE: Mobile

SALES REP: Aliena Somers SITE CLASS: COM SERVICE REGION: HOUSTON OPEN MARKET

**DUPLICATE ACCOUNTS**

Potential duplicates found. Would you like to Cancel or Continue?

ID	NAME	ADDRESS	DIVISION	STATUS	CREATED ON	SALES REP
541903002	Navusales - Demo 2	8100 Washington Ave	DAYTON	Inactive	May 6, 2021	House Account
A41898	Navusoft Premier Waste An...	8100 Washington Ave	DAYTON	Active		House Acct non ...
548972001	End Service WO Charges Test	8100 Washington Ave	HOUSTON	Active	Sep 11, 2023	Emilio Natarén
548971001	JIRA 15618	8100 Washington Ave	HOUSTON	Active	Sep 8, 2023	Emilio Natarén
548968001	JIRA 15694 Test	8100 Washington Ave	HOUSTON	Active	Aug 26, 2023	Dave Pike
548958001	Test Nylas	8100 Washington Ave	HOUSTON	Active	Jul 19, 2023	Dave Pike
548910002	Test order workorder creation	8100 Washington Ave	HOUSTON	Inactive	Jun 17, 2023	
548940001	Document Destruction Testi...	8100 Washington Ave	HOUSTON	Active	Apr 6, 2023	
548938001	Proposal Payment required	8100 Washington Ave	HOUSTON	Active	Mar 20, 2023	House Account
548937001	Anniversary Billing testing	8100 Washington Ave	HOUSTON	Active	Mar 19, 2023	House Account
548935001	Invoice format testing	8100 Washington Ave	HOUSTON	Active	Mar 17, 2023	House Acct non ...
548933001	Anniversary Billing Testing	8100 Washington Ave	HOUSTON	Active	Mar 15, 2023	
548925001	Pre Payment Test	8100 Washington Ave	HOUSTON	Active	Mar 4, 2023	
548921001	Scale Test	8100 Washington Ave	HOUSTON	Active	Feb 23, 2023	

**CREATE ACCOUNT** CLEAR

## Related Articles:

[Create Account: Screen Field Descriptions](#)

[Add and Edit Contacts](#)

[Order Processing](#)