Account Lists

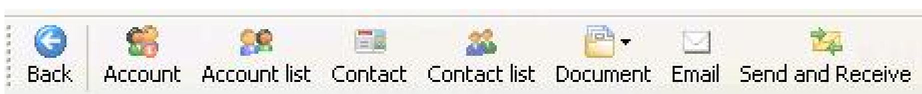
Account l sts are log cal group ngs of accounts that s mpl fy management and commun cat on processes, such as enabl ng creat on of documents or record ng of notes for the group as a whole. Account l sts are part cularly useful for creat ng a group ng of accounts that may only be needed temporar ly. For example, a share broker may w sh to record those accounts (people, trusts, compan es, etc.) who are nterested n an upcom ng new share offer ng. An account l st can be used to group these accounts as they show nterest, and to prov de a means of commun cat ng relevant nformat on to the nterested part es.

Account l sts operate s m larly to Contact l sts.

Cr at n an Acc unt L st

Step 1: Launch the New Account List Wizard

To create a new account l st, cl ck on the 'Account l st' button at the top of the screen.



The 'New Account L st' screen w ll be d splayed.

Step 2: Enter Account List Name and Owner

Nam Enter a name that descr bes the purpose of the l st. For example, Share Offer: July 2007. The l st name should be conc se, preferably un que, and mean ngful to other users v ew ng the l st.

O n r Select the account manager who owns th s l st. If the l st owner s d fferent to the one shown, cl ck the 'Select' button to select a d fferent account manager as l st owner.

Step 3: Add accounts to the list

Add any accounts to be ncluded n the l st. An account l st may n t ally be set up w thout any accounts. Accounts can then be added to the l st over t me. An account can be removed from an accountt l st at any t me us ng the 'Remove' button.

- Cl ck the 'Add' button. The 'F nd Account' screen s d splayed.
- If the requ red account belongs to another account manager, uncheck the 'My Accounts Only' box.

- Enter all or part of the account name or account Code n the box, and cl ck the 'Search' button. A l st of accounts match ng the search cr ter a w ll be d splayed.

- Double cl ck on the appropr ate account to select t, or alternat vely cl ck on an account and then cl ck Ok.

Follow the procedure l sted above to select one or more further accounts to add to the account l st. When all requ red accounts have been added, cl ck OK to create the l st. The account l st w ll be shown n, and access ble from, the treev ew on the left of the screen.

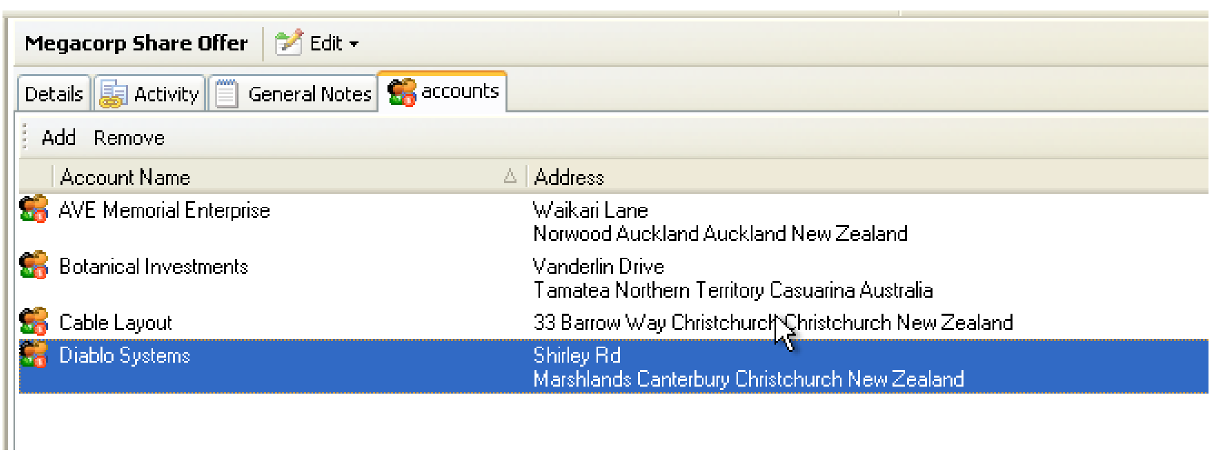
V   n   Acc unt L sts

Once an account l st has been created, t s v s ble n the Account L sts sect on of the treev ew on the left of the screen.

- Expand the Account L sts sect on (by cl ck ng on the '+') to show all Account L sts.

- Cl ck on the name of the requ red account l st.

- Cl ck on the Accounts tab to v ew all accounts n the l st.



Account List Tabs

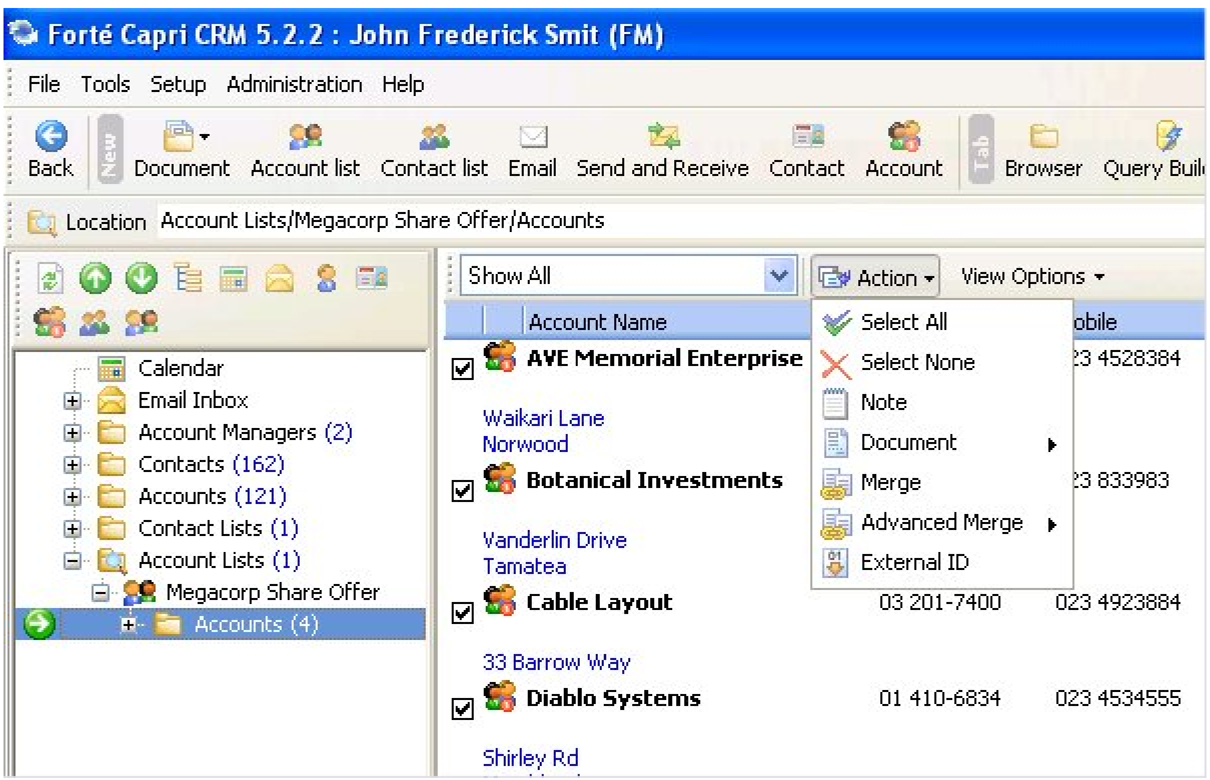
D ta ls	Shows the account manager who owns the l st and the user groups that can see and work w th the Account l st. Cl ck 'Groups' to perm ss on the l st to account manager groups.
Act v ty	Not currently used

G n ral N t s The 'Ed t General Notes' button s used to add comments to the Account l st. Th s may be used to descr be the purpose of the l st or to record any general nformat on about the l st.

Acc unts Deta ls of all accounts currently on the l st. Accounts can be added to or removed from the l st us ng the 'Add' and 'Remove' buttons on th s tab.

Us n Acc unt L sts

Cl ck on 'Accounts' below the name of the account l st n the treev ew to show the gr d of account l st members. The gr d v ew s used when perform ng tasks related to an account l st.



1. Mail merge from an Account List

- Cl ck the 'Act on' button above the gr d of account l st members, and choose 'Select All' from the drop down menu to create a document for all accounts on the l st. Alternat vely, nd v dual accounts can be selected by check ng the box bes de the r name.

- Cl ck the 'Act on' button aga n and select 'Document' and then the name of the document to be generated.

- Follow the same process as for ma l merge to create a document for each account on the account l st.

2. Recording a Note for an Account List

To add a note to the act v ty l st of each account n the account l st:

- Cl ck the 'Act on' button above the gr d of account l st members, and choose 'Select All' from the drop down menu.
- Cl ck the 'Act on' button aga n and select 'Note'.
- Select the contacts and accounts you w sh to f le th s note aga nst or choose 'Select All' to f le the note aga nst all l sted contacts and accounts.
- Select the note type from the drop down l st and enter the deta ls.
- Choose Ok to save th s nto the act v ty h story of all (or selected) account l st members.

3. Deleting the Account List

- Cl ck on the account l st Deta ls tab.
- Cl ck the 'Delete' button.
- Cl ck 'Yes' to conf rm the delet on.

Th s act on w ll delete only the account l st, not the accounts themselves. Account l sts may be reta ned ndef n tely, f requ red.