

Create a New Account

The **red asterisk sign (*)** indicates that you must enter data in the field i.e., the field is required. **It cannot be left blank.**

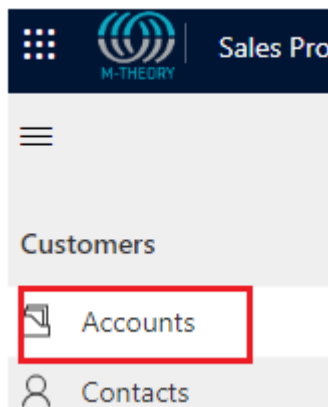
The **blue plus (+)** sign indicates that it is recommended to enter data in the field.

1. Open a web browser such as Google Chrome, Firefox, or Edge.
2. Copy one of these URLs and paste it in the browser's address bar.
<https://mtheory.crm.dynamics.com/main.aspx?appid=79288b8c-2bdf-ea11-a820-000d3a300ec6>
<https://mtheory.crm.dynamics.com>

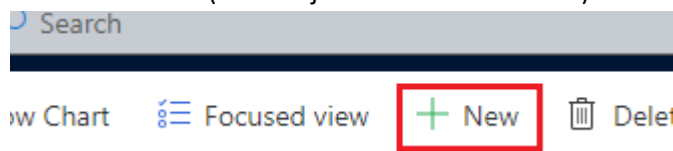
Dynamics Sales Professional app opens in the browser. You should see this title bar.



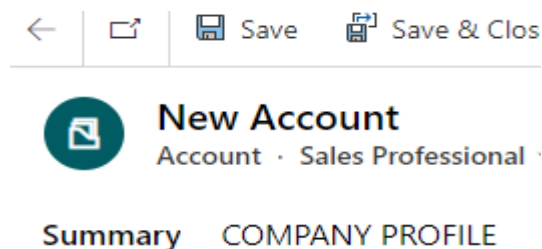
3. In the **Site Map** on the left side of the app in browser, click the **Accounts** tab.



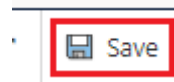
4. In the menu bar (located just below the title bar) click the **+ New** button.



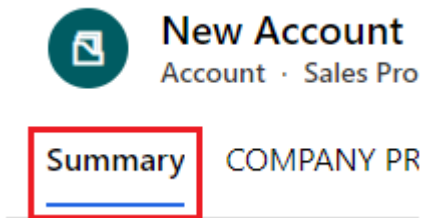
A new Main form opens. You should see the form whose upper section looks like:



Note: You can (and should) click the **Save** button in the menu bar to save the data you entered at any point.



5. Click the **Summary** tab to select the summary section of if it is not already selected.



Provide as much data as you know about the new account (company) in the **ACCOUNT INFORMATION** section.

6. Enter **Account Name**: It **must be unique**.
7. Enter **Short Name**.
8. Enter **Account Number**: It **must be unique**.

A screenshot of the "ACCOUNT INFORMATION" form. The title "ACCOUNT INFORMATION" is at the top left, enclosed in a red rectangular box. Below it are several input fields: "Account Name" with a red asterisk icon, "Short Name" with a blue plus icon, "Account Number" with a red asterisk icon and a subtext "(Enter Client Code max 8 characters)", "Relationship Type" with a dropdown menu, "Phone (Format: nnn- nnn- nnnn)", and "Fax (Format: nnn- nnn- nnnn)". The "Relationship Type" dropdown is open, showing a list of options: "--Select--", "Competitor", "Consultant", "Customer" (highlighted with a dark grey background), "Influencer", and "Investor". A red arrow points from the "Customer" text in the "Relationship Type" field to the "Customer" option in the dropdown list.

Notes:

- **Relationship Type:** **Customer** is selected by default. You could select other options. For example, select Vendor when you create account records for vendors.
- Enter the **Phone** number in this format: 123-456-7890. This is the company phone number.
- Enter the **Fax** number in this format: 123-456-7890

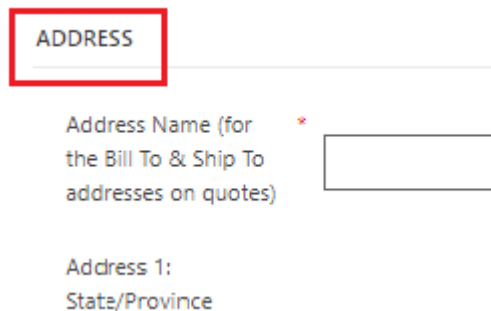
Provide as much data as you know in the **ADDRESS** section.

9. Type in **Address Name**.

It helps quote creator identify the Billing to and Shipping to addresses when creating a quote.

If applicable, enter the suite number in **Address 1: Street 2** field.

10. Enter **2-letter** state abbreviation in the **Address 1: State/Province** field (such as CA for California).

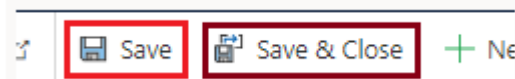


ADDRESS

Address Name (for the Bill To & Ship To addresses on quotes)

Address 1: State/Province

11. Click **Save** (to keep the main form open) or **Save & Close** (to close the main form) button in the menu bar.



Save Save & Close + Ne