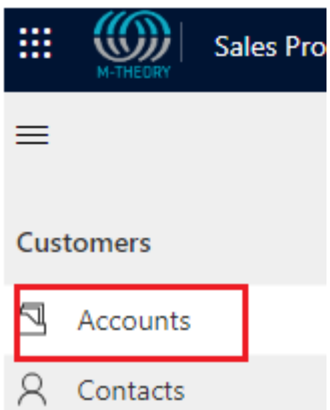
Create a New Account

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.

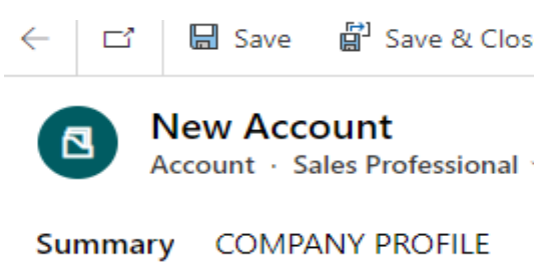
1. Open a web browser such as Google Chrome, Firefox, or Edge.
2. Copy one of these URLs and paste it in the browser's address bar.
   https://mtheory.crm.dynamics.com/main.aspx?appid=79288b8c-2bdf-ea11-a820-000d3a300ec6
   https://mtheory.crm.dynamics.com
   Dynamics Sales Professional app opens in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

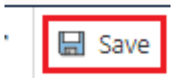


4. In the menu bar (located just below the title bar) click the + **New** button.

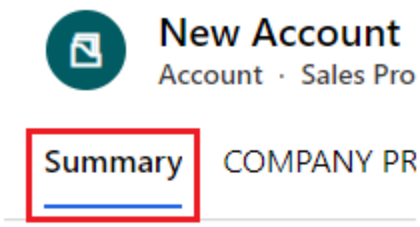
A new Main form opens. You should see the form whose upper section looks like:



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

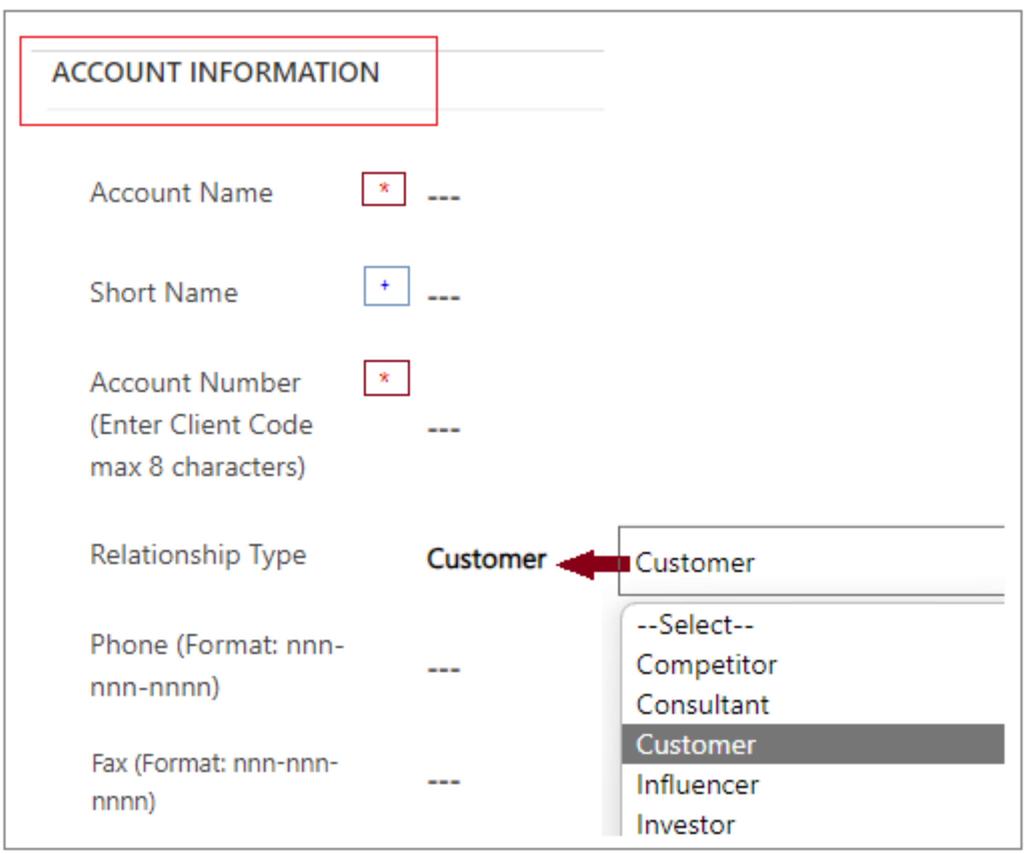


5. Click the **Summary** tab to select the summary section of if it is not already selected.



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

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



Notes:

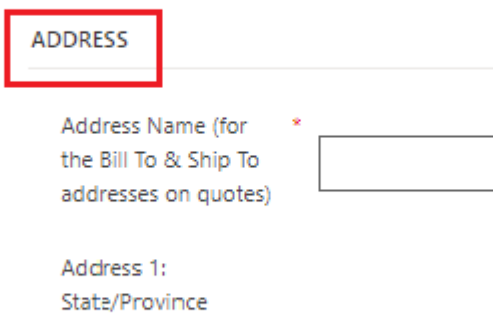
- **Relationship Type**: **Customer** is selected by default. You could select other options. For example, select Vendor when you create account records for vendors.
- Enter the **Phone** number in this format: 123-456-7890. This is the company phone number.
- Enter the **Fax** number in this format: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



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