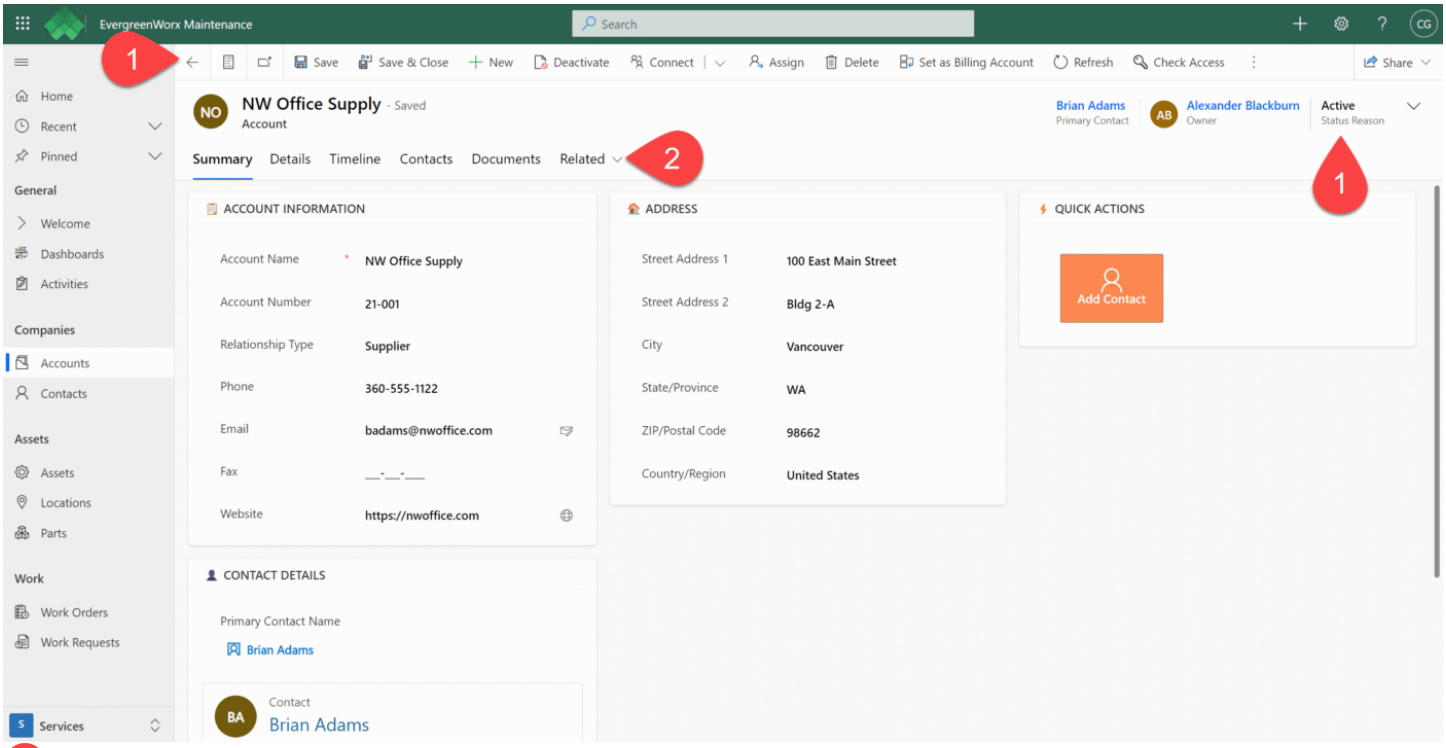
Accounts

General · https://evergreenworx.com/docs/accounts/

The main Account Record form stores key data about companies and organizations which have a relationship to Assets, e.g., suppliers, owners, etc.



1 In the ribbon, available actions are displayed for the current Account record, such as deactivating the record, deleting the record, or running a report. The actions available depend on your security role and permissions.

2 Record forms have tabs that allow the user to move between different data elements of the record. On the Account record, you will see the following tabs:

- Summary – Account information such as primary contact info and address.
- Details – Company information such as industry, contact preferences, and billing.
- Timeline - Stores historical notes and activities against the record. For more information, see Timeline | EvergreenWorx.

- Contacts – Contact information for people who work on behalf of the Account's company. For more information, see Contacts | EvergreenWorx.
- Documents – File attachments such as documents and photos.
- Related – Other related items, such as Record Audit History and Activities.

3 Accounts have an "Owner" who is responsible for the Record. The Owner can be used in queries throughout the system, allowing users to filter to just records they own (e.g., "My Accounts").