

Create/Modify Accounts in Alden ONE

To have access to Accounts in Alden One, work with your Company Administrator to ensure you have the correct permission for Accounts.

See all Accounts in Alden One

To see all Accounts, click the **Menu**, hover over **Accounting** and click **Accounts**.

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Add Accounts					Q						
Take Action 🗡								Show Deleted	Show/Hide C	olumns	~
Account Number	T Description	T Company Name	T	Company Type		Contact Name		T Street Address	٦	City	
<u>001 TEST</u>	Test Contact			CATV		Joe Cable		123 1st			
				OTHER							
				MUNICIPAL		Test Customer					
				COUNTY							
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				SCHOOL							- -

NOTE: If you were to click the thumbtack/pin icon before clicking on Accounts, you can pin the Accounts view so it opens automatically when you log in to Alden One.

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Click an action name to execute it. Clic Pin to add frequently used actions to y tab tray.	k the our	PR	O USER 🕐
Q Recent Conversation Types	\rangle		\sim
😡 Start a Conversation	>		
Accounting	>	🛇 Account Billing Info	\otimes
📲 Create Utility Pole		Account Configurations	\otimes
🕅 Run Reports	\otimes	♦ Accounts	\otimes
දිබුව View Admin Page	\otimes	Create Contracts	
View Reference Page	\otimes	🕅 Rate Types	\otimes

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Edit an Account in Alden One

- 1. Click the Menu, hover over Accounting and click Accounts.
- 2. Click the Account Number link for the account you wish to edit.

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Q Assigned To Me	Q Conversation Sea	Q Poles on Map	Accounts X			
Add Accounts				Q		
Take Action 🗡	/				Show Deleted	Show/Hide Columns ✓
Account Number	T Description	T Company Name	T Company T	Type 🝸 Contact Name	e 🛛 🝸 Street Address	T City
001 TEST	Test Contact		CATV	Joe Cable	123 1st	Spokane 📤

3. Edit the fields as needed.

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Q Assigned To Me	٩	Convers	sation Sea	2 Poles on Map	Accounts Accounts	× 💼 143444800 Account	×		
143444800		<	Account Number	•	Company Type	*	Contact Name	Contact Phone	
Account		-	001 TEST		CATV	~	Joe Cable	1-555-1212	
Accounts			Contact Fax		Street Address		City	State	
X History			1-555-1313		123 1st		Spokane	WA	~
			County		Postal Code		Vendor Number	Is Primary	
			Spokane		99201			Yes	~
			Contact Email		Accounting Compar	iy Code	Company Name	Description	
			Joecable@nom	ail.com				✓ Test Contact	

4. Click Save Changes.

County	Postal Code	Vendor Number	Is Primary
Spokane	99201	1	Yes 🗸
Contact Email	Accounting Company Code	Company Name	Description
Joecable@nomail.com			✓ Test Contact
		/	
		/	
	/		
	Save Changes		



Delete an Account in Alden One

- 1. Click the Menu, hover over Accounting, and click Accounts.
- 2. Click the account to delete so it becomes highlighted.

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Q Assigned To Me	Q Conversation Sea	Q Poles on Map	×			
Add Accounts				Q		
Take Action 🗡		/			Show Deleted	Show/Hide Columns 💙
Account Number	T Description	T Company Name	Company Type	T Contact Name	T Street Address	T City
001 TEST	Test Contact	×	CATV	Joe Cable	123 1st	Spokane 📤
			OTHER			
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	10 M I I I I I I I I I I I I I I I I I I		COUNTY			
			TELECOM			
			IOU			Spokane
			OTHER			
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4		_	SCHOOL			-

- 3. Click the Take Action menu.
- 4. Click Delete Accounts.



5. In the Confirmation window, click **OK**.





Manually Add an Account in Alden One

- 1. Click the Menu, hover over Accounting, and click Accounts.
- 2. Click the Add Accounts button.



3. Fill in the new, Create form.

Account Number	* Description	Company Name	Company Type *
Contact Name	Street Address	City	State
Postal Code	County	Contact Email	Contact Phone
Contact Fax	Is Primary	Vendor Number	Accounting Company Code

4. Click Apply.

Account Number 12345678 - TEST	Description	Company Name	Company Type
Contact Name	Street Address	City	State
Postal Code	County	Contact Email	Contact Phone
Contact Fax	Is Primary	Vendor Number	Accounting Company Code

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