

Accounts

PinPoint allows you to keep track of your accounts/contacts, whether that's vendors, clients, prospects, etc., through the built-in Contact Manager.

Go to Contact Management > Accounts within the PinPoint menu on the left side of the page.

Add Account

1. Click the Add Account
2. Enter the Name.
3. Fill in any other information you would like to have for the account, then click the Save button when finished.

Import Accounts

1. Click the Import Accounts
2. Choose the file you want to import.
3. Click Import Accounts.

Manage Accounts

The Fx button next to each account will have the following options:

1. Add Contacts - Add/remove contacts to the account.
2. Appointments - Manage account appointments.
3. Contacts - View the contacts in the account.
4. Delete - Delete the account.
5. Display - This function allows you to view Account Notes, Appointments, Emails, Opportunities, and Reminders.
6. Documents - View the documents assigned to the account.
7. Email - Send an email to the contact person for the account.
8. Labels - Customize the field labels for the account.
9. Notes - View account notes.
10. Opportunities - Manage account opportunities.
11. Reminders - Manage account reminders.
12. Security - Manage account security.
13. Timers - Timers will allow you to enter start and end times for an appointment. This may be particularly helpful for those needing to submit to insurance companies for payment. This can also be helpful for your own information to keep track of contact made to each account.

Edit Account

To edit an Account, click the Account you want to open.

When finished making your changes, be sure to click the Save button.