Adding and deleting client accounts

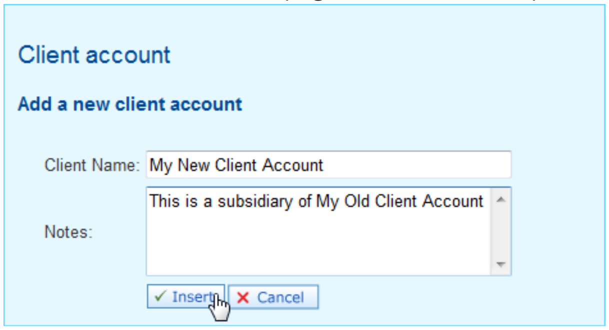
The first step to creating a disclosure or a consolidation in Account is to add a client account. The client account will act as the "parent folder" for all the disclosures and consolidations related to that account.

How to add a client account

1. Log into the Account website. *[Need a username and password? Contact Krista Sacrey at ksacrey@eckler.ca.]*

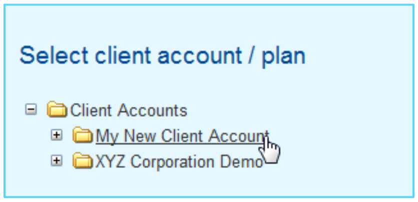
2. In the **View details** panel on the right, click: + Add new client account

3. In the **Client account** panel, enter the "Client Name"
   - This is the name that will appear on the client account folder in the tree navigator.
   - Additional information (e.g., full client name) can be added under "Notes"



4. When finished, click: ✓ Insert

5. The new client account folder should appear in the **Select client account/plan** panel on the left. Click on the folder name to select the client account.



How to delete a client account

1. In the **Select client account/plan** panel on the left, click on the client account folder name to select the client account.

2. In the **Client account** panel, click: Delete client account

3. Confirm that you wish to delete the account and all related plans by clicking **OK**.

Note that only the client account manager can delete a client account.