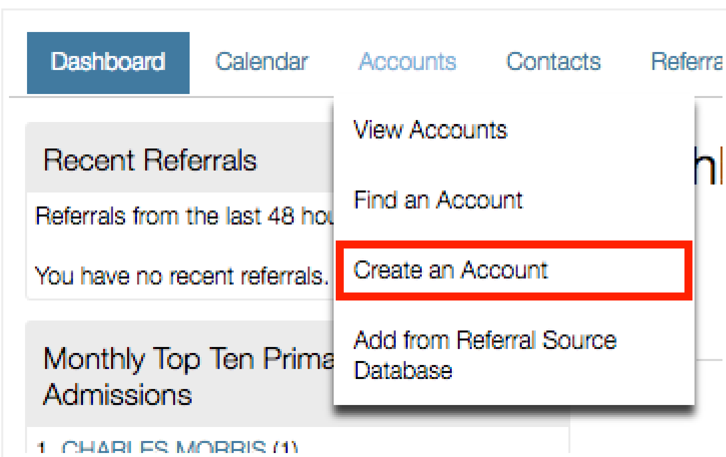
Creating An Account

There are two ways to manually add a new account in PlayMaker. Alternatively, you can also create an account by adding it from the market data in the Referral Source Database or TargetWatch, discussed in this article.

> Note that if your Electronic Health Records system is integrated with PlayMaker you may not be permitted to create new accounts.

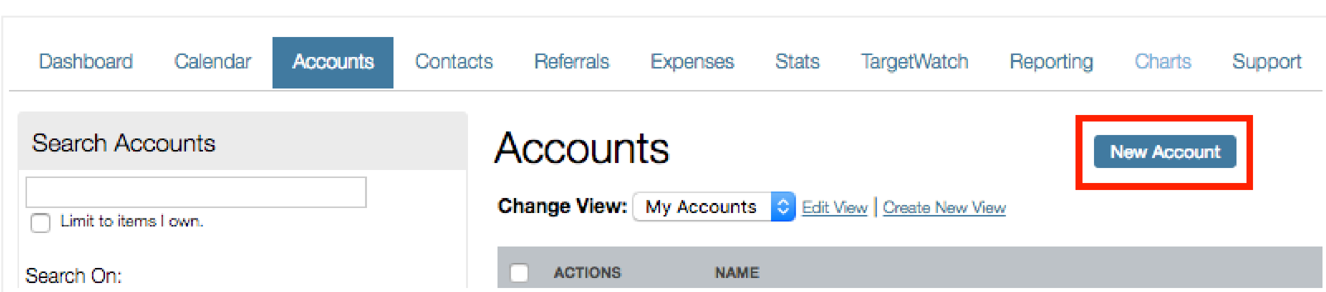
From Navigation

Mouse-over the *Accounts* link, just below the PlayMaker logo, then click ***Create an Account*** from the menu that pops up (shown below).



From within the Account View

Click on the *Accounts* link (rather than letting the mouse hover over it), then click on the *New Account* button.



Either of the above methods will then display the editable *Account Details* screen, where the account information can be input. If the user inputting the account is not who the account should be assigned to (or the Shared Owner of the account), the assignment can be changed in the *Shared Owners* section of the *Account Details*.

By default, the only field required on a new account is the *Account Name*. PlayMaker suggests that users add as much information as possible. These additional details allow users to see if the accounts are duplicates or different facilities, based on location, etc.

Once all the information has been entered, simply click *Save* at the top or bottom of the page. Once saved, the *Account Details* page will be displayed, and a green notice will show at the top of the record that the account is now saved in PlayMaker.

> ***Tip:*** Before creating an account, it is recommended that users search the *All Accounts* view for the account, as it may exist, but may not be assigned to the user.