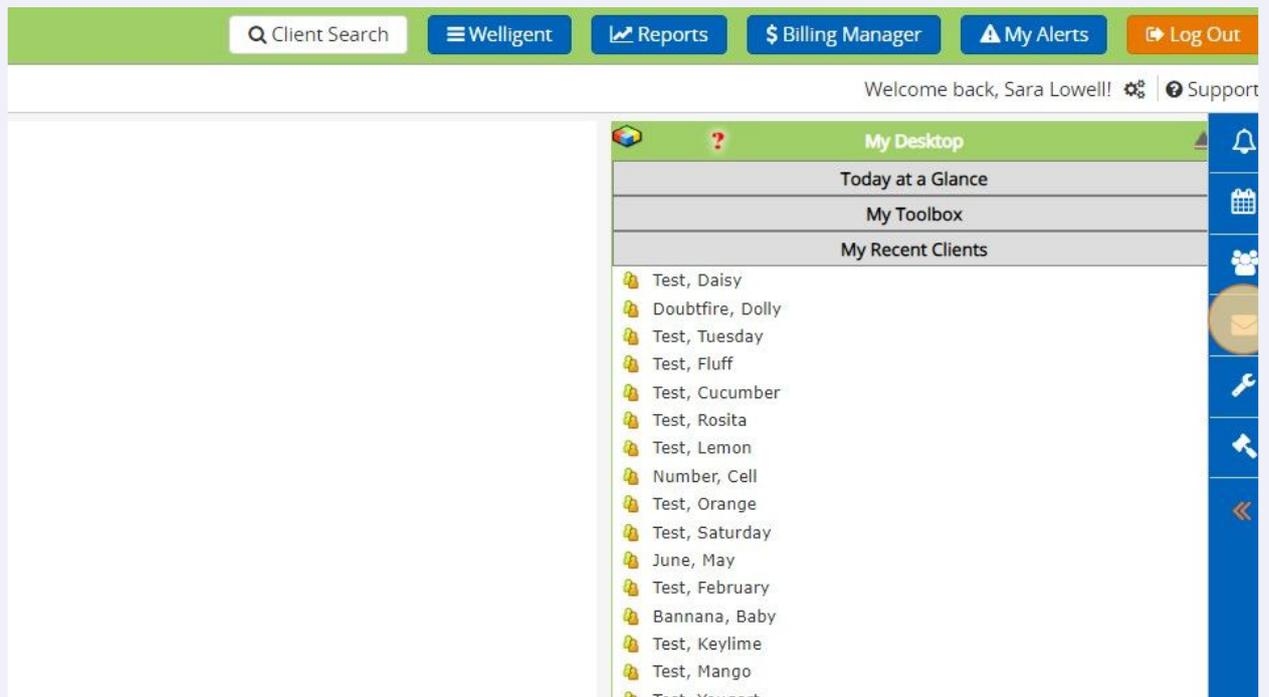


# Accounts Manager - Adding a New Agency

1 Click on Communications Center (Envelope icon on left side)



## 2 Click "Accounts"

The screenshot shows a software interface with a green header bar containing navigation buttons: "Client Search", "Welligent", "Reports", "Billing Manager", "My Alerts", and "Log Out". Below the header, a welcome message reads "Welcome back, Sara Lowell!" followed by a gear icon and "Support". A "Communications Center" sidebar is open, listing options: "Mailbox", "Announcements", "Downloads", "Accounts" (highlighted with an orange circle), and "Contacts". The main content area displays a list of test accounts, each with a yellow padlock icon and a name: "Test, Daisy", "Doubtfire, Dolly", "Test, Tuesday", "Test, Fluff", "Test, Cucumber", "Test, Rosita", "Test, Lemon", "Number, Cell", "Test, Orange", "Test, Saturday", "June, May", "Test, February", "Bannana, Baby", "Test, Keylime", "Test, Mango", and "Test, Yaguet".

## 3 Click "New" to enter a new Agency

The screenshot shows the same software interface as above, but with a form for creating a new agency. The form fields are: "Status" (dropdown menu set to "Active"), "Program Type" (dropdown menu), "Account Type" (dropdown menu), "County" (text input), "Zip" (text input), "Grouping" (dropdown menu), and "External ID" (text input). A "Search" button and a "New" button (highlighted with an orange circle) are located in the top right of the form area. Below the form is a table with the following headers: "State", "Type", "Phone", "Status", and "Special Grouping". The table body is currently empty.

4

Enter Agency information. Be sure to select "Active" in the Status field.

ation

Details Services

Account Details:	
Name:	<input type="text"/>
Status:	<input type="text" value="Active"/>  
Type:	<input type="text"/>  
Welligent ID/External ID:	<input type="text" value="0"/> / <input type="text"/>
Street Address:	<input type="text"/>
Account Rep:	<input type="text"/> 
City:	<input type="text"/>
County:	<input type="text"/>
State:	<input type="text" value="RI - Rhode Island"/> 