

# Account Manager Security

Remove the risk of mistakes in account manager selection and gain closer control over your accounts

Price Guide: £500 per site plus ALF

Security of your accounts is essential when managing a business, especially as the business grows. The Account Manager Security Option stops users without the necessary rights from changing account managers without authorisation. This is valuable for any sales organisation in which team members are assigned specific companies to target and manage, through the account manager field in ProspectSoft CRM.

Using this application ensures that new client records are allocated to the relevant account manager in the sales team and that once allocated, assigned companies cannot be re-assigned by unauthorised staff thereby increasing security.

## Key Features

- When creating a new record the users will only be able to set the account manager as none or themselves.
- When editing an existing record without an account manager, or one that has the account manager set to DBA, the users will be able to change the account manager only to themselves.
- When editing an existing record that has an account manager set that is not DBA the users will not be able to change the account manager.

## Benefit

Avoids mistakes in account manager selection that could be costly later.



## Typical Users

Any Sales Organisation, in particular larger companies with several account managers.

## Dependencies

The Account Manager Security Option requires the following ProspectSoft modules to be installed:

- B2B or B2C Contact Manager
- XML API

## Related XML API Options

- Contact Division Verification
- Territory Manager

## Additional Information

For more information about ProspectSoft CRM software developments, please visit:

[www.prospectsoft.com/crm/options](http://www.prospectsoft.com/crm/options)

