

Account Profiles

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Overview

Account profiles are one of the ways that service providers can group their accounts. In Emersion, all accounts *must* belong to a single account profile.

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Licensing

This feature is available to subscribers of the following:

- ☒ [Emersion Core](#)
- ☐ [Optional Modules](#)
- ☐ [Upon Request \(please contact your Account Manager\)](#)

Acceptance Test

There is no acceptance test for this feature.

[What is this?](#)

Features and How To's

This section contains articles on the functionality of this feature.

Core Functionality

- [Account Profiles Fundamentals](#)

How To's

- [Create an account profile](#)
- [Edit or delete an account profile](#)
- [Add or remove an account from an account profile](#)
- [Map a product price book to an account profile](#)
- [Map a package plan to an account profile](#)
- [Configure contact identity information](#)

Prerequisites

Before attempting to use this feature, users should know how to:

- [create and edit accounts in Cumulus](#)

Dependencies

There is no dependencies for this feature.

Access Control

If you are unable to access a given feature and you have checked the permissions and powers, please contact **Emersion**.

Module Permissions

There are no module permissions related to the module.

Powers

Powers are used to control access to features, functions and page sections.

Power	Description
Account Profile Administration	The parent power for Account Profile administration.
Account Profile - View	Can view the account profile of a customer.
Account Profile - Edit	Can edit the account profile of a customer.
Account Profile - Trading Terms - View	Can view the trading terms on an account profile.
Account Profile - Trading Terms - Edit	Can edit the trading terms on an account profile.
Create Customer > Account Profile	Powers related to account profiles when creating customer accounts.
Account Profile Setting - View	View the account profile that will be used during account creation process.
Account Profile Setting - Edit	Edit the account profile during the account creation process.
Account Profile Search Filter	Enables access to perform a customer search using the Account Profile filter
Search Account Profiles	Allows you to select an account profile when searching for a customer

Feature Events

There are no events related to the feature directly, however understanding how account profiles and events are interrelated is essential. Please see the our fundamentals article for further information.

Feature Reports

There are no reports specific to this feature, however many reports that output customer information contain the account profile as part of the results.

Related Articles

- [Map a Package Plan to an Account Profile](#)
- [Set Netsuite Push Settings for an Account Profile](#)
- [Accounts and Contacts](#)
- [Account Profiles](#)
- [Transitioning Customers to Different Invoice Templates](#)
- [Account Profile Fundamentals](#)
- [Account Profile Interactions With Xero](#)
- [Change an Account Profile for an Account](#)
- [Contact Form Identification Fields](#)
- [Edit or Delete an Account Profile](#)
- [Update a Report Map](#)
- [Delete a Report Map](#)
- [Create a Report Map](#)