# Creating Accounts & Contact in Salesforce

This guide will help when creating accounts (households) and contacts (individual clients) in Salesforce. Please follow the steps below and if you have issues, contact Nick Olendorf at 217.542.1217.

Step 1: Login to Salesforce by going to login.salesforce.com and entering your credentials.

Step 2: For best practices before creating a contact, please use the global search bar at the top to search your client's name. This helps avoid creating duplicates. See the highlighted search box in the screenshot below:
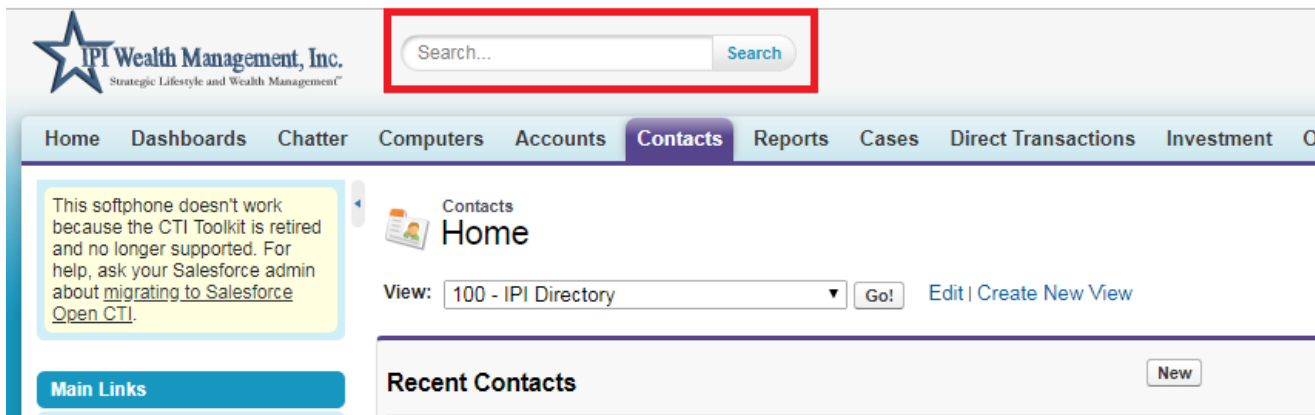
Step 3: From the home page, select the 'Contacts' tab. This will bring you to a new page and then you will select the 'New' button.
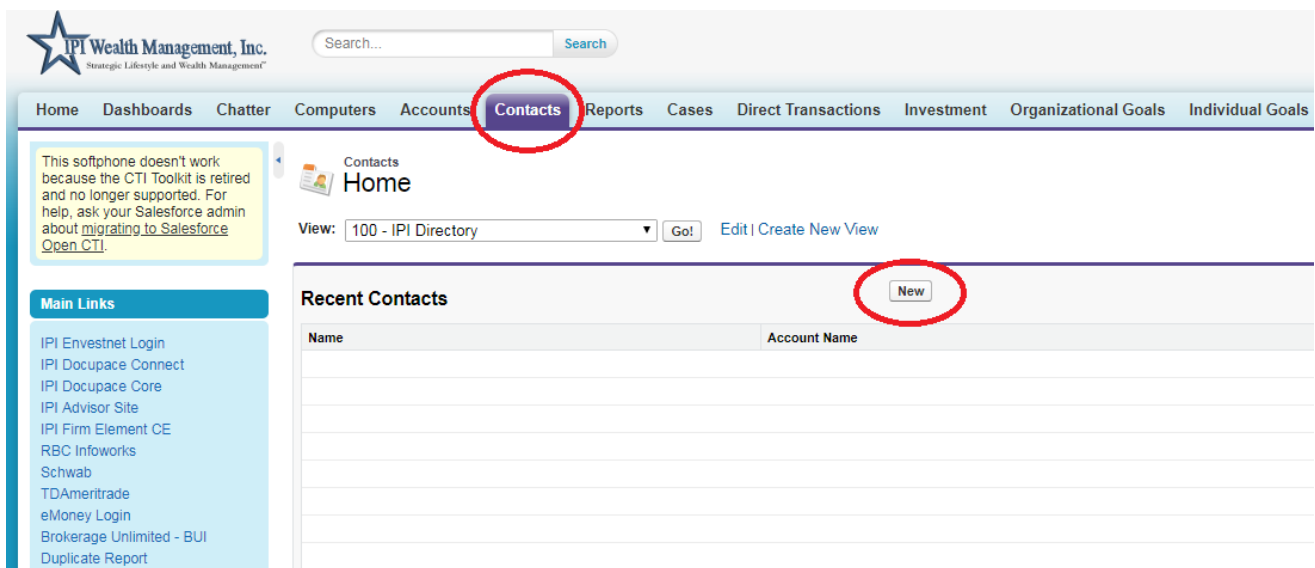
Step 4: After selecting the 'New' button, you will come to a page with a drop-down box. Make sure you are selecting the record type of the client you are about to create and click 'Continue'. Most of the time, the record type is going to be 'Client'. For business contacts, use 'Business' or 'Contact Person'.

New Contact
Select Contact Record Type

Select a record type for the new contact. To skip this page in the future, change your record type settings on your personal setup page.

Select Contact Record Type

Record Type of new record	Client ▼

Continue   Cancel

Available Contact Record Types

Record Type Name	Description
401K Owner/Trustee	
401K Participant	Use for 401K participants who are part of a plan you manage and are not currently clients.
Advisor Assistant - Non Registered	
Archive	Non-Active Contacts
Business	Employees of a business or vendor
Client	

Step 5: After clicking continue, you will be brought to the fillable contact record where you will be able to fill out all the client information. First, you need to make sure you create a household name.

On the 'Account Name' field, select the [magnifying glass] button (to the right of the field) and then click the 'New' button. You can re-search the household name to make sure you are not creating a duplicate record if you want but it is not necessary as you did that in Step 2.

Account Name	[ ] 🔍
Contact Record Type	Client
Individual Type	--None-- ▼

🔍 Lookup

Search...   Go!   New

Search ● Name ○ All Fields

Recently Viewed Accounts

📁 Accounts [35+]

Step 5: After clicking the 'New' button, you will be able to enter the account name and then click 'Save'.

Step 6: After clicking 'Save' you will be returned to the page where you can enter in all of the client's information. Make sure you have your filled out new account form in front of you and you can go line by line entering the information into Salesforce. Once all information is entered, click the 'Save' button and your account (household) and contact (individual client) record will be created.