

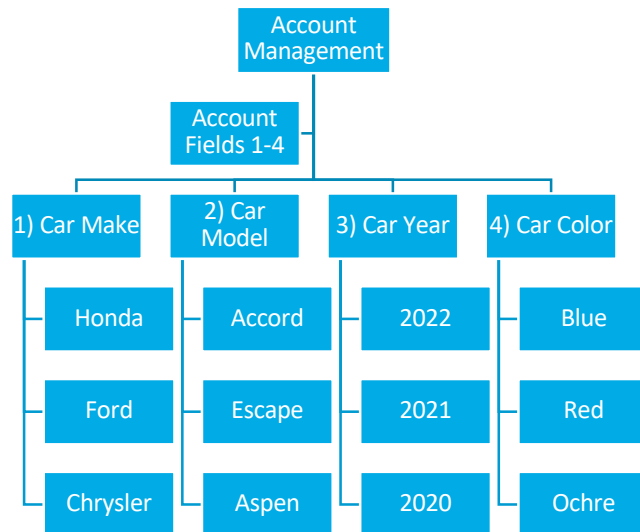
Introduction to Account Fields



Learning Objective

The goal of the Account Fields module is to acquire an understanding of how to use account fields to provide additional customer details to tailor your product offerings and monetize services as effectively as possible.

Below is an example of how a car parts manufacturer can configure Aria Account Fields to track customer information and effectively target services, products, and promotions.



Quick Tip: Account Field information can be added, updated, or deleted through the Aria UI or selected APIs like `create_acct_complete_m`.

Field Details

Set up your Account Fields as follows:

Value
Field Name/Description
Field Order (numeric order of appearance)
Required/Hidden
Presentation Mode (Text Input, Text Area, Select Box, Radio Buttons, or Check Boxes)
Allowed Values (for Select Box, Radio Buttons, or Check Boxes)
Minimum or Maximum Choices Selection (for Text Input, Select Box, or Check Boxes)

Major Takeaways

- Account Fields provide more granular details about customer accounts based on industry segment, location, customer preference, and a wide range of other categories to facilitate account management and revenue optimization.
- Access Account Fields under **Configuration > Client Settings > Account Fields**.
- Reporting on Account Fields is available within your Aria instance.