Accounts

Overview

Accounts lists the companies synced from your connected CRM (e.g. Salesforce, HubSpot, or Dynamics 365). For each company, it shows open opportunities and leads, the conversations and insights linked to it, and related Tracker issues. Alchemer Voice only reads account data from the CRM; nothing you do on this page changes the CRM record.

Conversations are linked to an account automatically when their participants match contacts in the CRM. Only conversations that have finished processing are counted and shown.

Using the account list

Search by name, or select **Filter** to narrow the list, for example by CRM fields or labels. The **My accounts** and **All accounts** tabs are described under Permissions below.

Linked records on the account page

- Each open opportunity and each unconverted lead is shown with a link to the CRM. Closed opportunities and converted leads aren't shown.
- Select an opportunity or lead name to limit the page to the conversations and insights tied to it.
- Tracker issues are product issues related to this account's insights. They appear only when there are matches. See Tracker.

Actions

- **Ask the Analyst:** Opens the Analyst scoped to the conversations currently shown. It's unavailable when there are none. See Analyst Tool.
- **Create Topic Set:** Groups the account's current insights into themes. Requires at least one insight. See Topic Sets.
- **Filter:** Narrows the insights and conversations on the page.
- **Label:** Applies labels to the account. See Labels & Tagging.

Troubleshooting

- **My accounts is empty.** This tab lists accounts where you're recorded as the owner in the CRM. It's empty if you own none, or if your CRM user can't be matched to your Alchemer Voice user. Try All accounts.
- **Fewer conversations than expected.** Conversations that are still processing, or whose participants don't match a CRM contact, aren't linked.

Permissions

What you see on Accounts depends on your role. If Accounts is missing from the left-hand menu, ask your administrator to review your role in **Admin > Roles**. See Roles and permissions.

Action or area	Permission
My accounts tab: accounts you own in the CRM	Read my CRM data
All accounts, limited to accounts owned by people in your groups	Read group CRM data
All accounts, with every account	Read all CRM data
Tracker issues on the account page	Permission to see Tracker
Create Topic Set	Permission to create topic sets
Label	Apply labels

If you have only one of the two tabs, you go straight to it. If an account you know exists is missing, your role may limit you to your own or your groups' accounts.

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