Manage Chain Accounts

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The Chain Accounts functionality provides the ability to group customers who are not financially related for reporting purposes. This is useful if you want to see the overall accounts receivable aging and active RMR for related accounts all on one page. SedonaOffice provides a form to view this information; you may also drill down into the individual accounts to view detailed information. To use this functionality, you must first create records in the Chain Accounts setup table within SedonaSetup. Once created, you would assign this value to the related customer records on the customer information form. After the customer accounts have been assigned to a Chain Account you may view the group's information in the Manage Chain Accounts form.

An example of a Chain Account use would be a retail store chain named Sam's Coffeehouse which has many locations throughout the city. Each store is a franchise and billed separately for services, so each store is a separate customer responsible for its accounts receivable. If you wanted to know collectively, how much recurring revenue and what is the accounts receivable aging for all of the stores, assigning a Chain Account value to each of the Sam's Coffeehouse customer records would enable you to view this information together on one form.

Viewing the Chain Accounts List

The Change Accounts list is controlled by User Permissions and is accessed from the Client Management Module under the tree option of Manage Chain Accounts This form is divided into two tiers; the upper tier will display a list of all Chain Accounts and the total accounts receivable for each Chain Account; the lower tier displays the total active RMR and total accounts receivable amount due for each of the accounts within the Chain Account. To access a Customer Explorer record for a customer displayed in the lower tier, double-click on the customer record.