Create a New Master Account

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There are two methods for creating a new Master Account. One method is to create a regular customer and then convert it into a Master Account. This option requires more steps in the process. The Master Account is created the same as when creating a regular customer. Once the new Customer is saved it will be converted into a Master Account. Follow the link for instructions on Converting to a Master Account.

The other method is to create the new Master Account from the Master Account List. Once the Master Account is created, you will add the Subaccounts to the Master Account. You may also link and existing customer to the Master Account, thus becoming a Subaccount of the Master Account.

Creating a new Master Account

1. Navigate to the Client Management Module menu and click on the Master Account Mgmt option.
2. The Master Account List will be displayed. Click on the New button located at the lower right of the list.

The New Master Account form contains three possible data entry tabs, all of which will be explained below.

3. The New Master Account form will be displayed. The first tab is the Customer Information form. The information entered into this form establishes the Master Account Name and the Primary Billing Address, and other key customer information. Most of the data entry fields are self-explanatory, however, key fields and typical business rules are listed below.

When finished filling out this form, click on the Custom Fields tab. If this tab is not shown, this indicates your company is not using Customer Custom Fields or you do not have permissions to access this tab. If not using Custom Fields, continue on the the Services tab.

Customer# – If your company has set your customer numbers to be auto-number when creating a new customer, Master Accounts do not follow this rule. It is up to your company to enter the Customer Number for the Master Account. The customer number may be numeric, alpha or alpha-numeric.

Separate Cycle Invoice for Each Site - If you will be sending out separate invoices for recurring services for each Site on each Subaccount, leave this box checked. If you will be creating one consolidated invoice for all recurring services for all of the Master Account Subaccounts, then un-check this box.

4. If your company is using Customer Custom Fields, please refer to your company's policies and procedures for this form. When finished, click on the Services tab.

5. The Services tab is designed to create an Invoice Item price list that will be used when setting up recurring lines for this Master Account's Subaccounts. If you are offering special pricing to the Master Account, setting up this list will minimize data entry errors. Setting up the Services is optional.

6. When finished filling out all data entry forms, click on the Save button at the lower right of the form. A confirmation message will be displayed asking you if you are ready to save this new customer; click on the Yes button to confirm.

The Master Account Customer Explorer record will be displayed. The next step is to select a couple of options on the Master Account Customer setup.

7. On the customer tree, click on the Customer Information menu option, right-click and select the Edit Customer

Setup option.

8. The Customer Setup Information form will be displayed. When finished with the two fields below, click on the Save button located at the lower right of the form.
•In the "Account Index" field enter the beginning index number for the first Subaccount. When a new Subaccount is created, the customer number that will automatically be assigned will start with the Master Account Number, then a hyphen followed by the index number. In the sample below, if the Account Index is set to 1, the first Subaccount Number will be set to 1225-1. The next Subaccount created will be 1225-2 and so on.
•In the "Default New Sub-Accounts to Bill to Master Account" field, you will check the box if all invoices created under a Subaccount will bill to the Master Account's A/R or if you un-check this box, any invoices created under a Subaccount will remain on the A/R of that Subaccount.

Adding Subaccounts to the Master Account

The next part of the process is to create the Subaccounts. Creating is Subaccount is almost identical to creating a regular customer/site/system record.

8. On the customer tree of the Master Account, click on the Sub Accounts menu option, right-click and select the New Sub Account option.

The New Customer Setup form will be displayed. There are five possible data entry tabs. All five forms are covered under this topic, however follow your company's internal policies and procedures when entering information for the Subaccount.

9. Customer Information tab - Fill in all required and optional fields according to your company's policies and procedures. If invoices are to be billed directly to the Subaccount, this form will be setting up the primary billing address for the Subaccount. When finished, click on the Site Setup tab.

10. Site Setup tab - Fill in all required and optional fields according to your company's policies and procedures. This is the physical property address of where equipment is installed, serviced and/or billed for recurring services. Make certain to select the correct tax group for the Site.
When finished, click on the System tab.

11. System tab - Fill in all required and optional fields according to your company's policies and procedures. The System Account field is the Central Station Account Number if this is a monitored account. When finished, click on the RMR tab.

12. RMR tab - This form is used to setup any recurring lines that will be invoiced for the System. Fill in all required and optional fields according to your company's policies and procedures.   When finished, click on the Custom Fields tab.

13. Custom Fields tab - If your company is using Customer Custom Fields, please refer to your company's policies and procedures for this form. When finished, click on the Save button located at the lower right of the form. A confirmation message will be displayed confirming you are ready to save the new customer (Subaccount) - click on the Yes button to proceed.

The Customer Explorer record for the Subaccount will be displayed. To add the next Subaccount, close out of the Subaccount form by clicking on the red "X" in the upper right corner of the Subaccount record. You will be returned to the Customer Explorer of the Master Account. Follow the same process for creating additional Subaccounts.