Convert a Regular Customer to a Master Account

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Since Master Accounts have no Site records, when converting a regular Customer into a Master Account, any Site records that were on the customer tree for the regular Customer will automatically be converted into Subaccounts and are attached to the Master Account.

To convert a regular Customer into a Master Account follow the instructions listed below.

1. Open the Customer Explorer of the Customer that will be converted into a Master Account.
2. Highlight the customer tree option Customer Information; right-click and select the Edit Customer Setup option.
3. The Setup Information form will be displayed. There are three key data entry fields necessary for converting to a Master Account, which will be described on the following page.

4. On the Setup Information tab of the Customer Setup form, there are three fields in the Master Account Information section; Is Master Account, Account Index, and Sub Account Invoices to Master A/R.

Is Master Account – Select this option. A message will be displayed confirming you want to convert the Customer into a Master Account; click the Yes button to continue.

Account Index – 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 16293-1. The next Subaccount created will be 16293-2 and so on.

5. Once all information has been completed on the Setup Information form, click the Save button located at the lower right of the form.

A message will be displayed indicating the customer is being converted into a Master Account. This message is displayed very briefly on new Master Accounts. If you are converting a Customer that has several Sites (over 30) this make take a few seconds to complete the process.

6. Open the Master Account record, highlight Customer Information from the customer tree and select the option Edit Customer Setup.

Default New Sub-Account to Bill to Master Account – Once you have saved the Master Account and opened it for editing, in this 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.

7. The Master Account Customer Explorer will be displayed. You may begin entering additional Subaccounts for the Master Account. This process is described under the heading of Adding New Subaccounts.

The final optional but recommended step is to set up default rates to be used when creating new Recurring Lines for a Subaccount. Follow the link for Setting up Master Account RMR Rates.