

Adding a New Sub Account

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Creating a Subaccount is almost identical to creating a regular customer/site/system record.

Begin by opening the Master Account record.

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

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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.

2. 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.

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3. 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.

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4. 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.

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5. 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.

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6. 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.

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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.

