Retrieving Master Account Records

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Opening the Customer Explorer for a Master Account may be done by using the normal search methods for Customer/Site type Customers or by searching from the Master Account List by navigating to the Master Account Mgmt option within the Client Management main application menu.

Selecting the Master Account Mgmt option within the Client Management main application menu will display a list of all Master Accounts. Within the Master Account list information is display as to the number of Subaccounts attached to the Master Account, the total active RMR, the Net AR Due, and the last date the Master Account was Cycled.

In the header area of the Master Account List are checkbox options. If you do not want do display one or more of the columns of information when the Master Account List is displayed, un-check the options you do not need to view.

Note: The more options selected, the longer it takes to refresh and view the list of Master Accounts.

Once the list of Master Accounts is displayed, you may sort the list by clicking on any of the columns displayed.

To work with one of the Master Accounts, double-click on the desired Master Account within the list. The Master Account Customer Explorer will be displayed.