Master Account Customer Explorer

Last Modified on 01/09/2023 2:05 pm EST

Working with Master Accounts and Subaccounts within the Customer Explorer is a different than working with a regular Customer/Site account. Notice on the Master Account Customer Explorer there is not a Site customer tree option; a new menu tree option labeled Sub Accounts is listed below the Customer Information tree option.
When highlighting the Sub Accounts menu tree option, a list of all Sub Accounts and their Sites is listed in the Active Pane. To work with a Subaccount, double-click on the desired record within the Active Pane.

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When highlighting the Sub Accounts menu tree option, a list of all Sub Accounts and their Sites is listed in the Active Pane. If the Subaccount has multiple Sites there will be multiple rows listed in the Active Pane for the Subaccount (do not confuse these as being duplicates).
Monthly Recurring Revenue is also displayed in the Subaccount list. If a Recurring Line is set up to invoice to the Master Account, the monthly amount will be listed in the Master RMR column. If the Recurring Line is invoicing directly to the Subaccount, the monthly amount will be listed in the Sub RMR column. If the Subaccount has multiple recurring lines, the amounts shown will be the total monthly charges.
In the example below, the only Subaccount listed was created from the Customer/Site information when the Customer was converted to a Master Account. If this is a Dealer Account, the User may not need to make any changes to the Subaccount information. It is often the case in Dealer situations, that the Dealer itself is being monitored by your company. If this is not a Dealer account, open the Customer Explorer for this first Subaccount and modify the Customer and Site information as need.
To work with a Subaccount, highlight Sub Accounts from the customer tree, then double-click on the desired Subaccount record in the Active Pane.

After selecting a Subaccount from the Master Account, a new Customer Explorer record is displayed containing information relevant to the Subaccount customer. Each Subaccount linked to the Master Account will have its own Customer Explorer record. Navigating and performing activities within a Subaccount Customer Explorer is the same as on a regular Customer/Site record.
On the Subaccount Customer Explorer, a menu tree option is listed that does not appear on regular Customer/Site accounts. This option Other Subaccounts is used to select another Subaccount work with that is attached to the same Master Account. Each time a different Subaccount is selected, a new Subaccount Customer Explorer will open. Make certain to close each Subaccount Customer Explorer record when finished working with it; these records will continue to stack on top of each other if not closed when finished.
Also the title banner of a Subaccount Customer Explorer will indicate the customer is a Subaccount of a Master Account.

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