

SedonaWeb Master and Sub Accounts

Last Modified on 07/10/2023 3:09 pm EDT

Master Accounts

When a customer is registering their account and they are a Master Account customer (typically a dealer or a national account with many subaccounts), on the home page, the Site Listing tab is replaced by a new tab labeled “Sub Account”. Also under the Settings tab, a new option is displayed labeled “Manage Customer Logins”. Details on each of these options will be described below and on the following pages under this Master Accounts topic.

Sub Account

When clicking on the Sub Account tab from the home page, a listing of all sub accounts linked to the master account will be displayed.

Customer Name Lyons, Francesca
Address Info
63 Coleman Road
Novi
MI
48375
7344364282

Current Balance
\$2,246.19
[Make a Payment](#)

Credits
\$146.60

Last Payment: \$7.50
Received on: 9/9/2019
Amount Past Due: \$2,246.19

Sub Accounts [Back](#)

Drag a column header and drop it here to group by that field

Customer #	Name	Address	Current Balance	Master Rmr	Sub Rmr	Open Service Ticket
51062	Francesca Lyons	63 Coleman Road	0.00	111.39	111.39	1
52193	Leo Lyons	12345 Main Avenue	0.00	0.00	0.00	0
Total:			\$0.00	\$111.39	\$111.39	Total: 1

10 items per page 1 - 2 of 2 items

Subaccount Details

While viewing the list of sub accounts, if you click on the Customer # link, the account being viewed will switch to that sub account customer.

HELIX GROUP
Hello: carolynj@boldgroup.com

Home Sub Account Site Listing RMR Invoices Payments Service Documents Settings Logout

Sub Accounts Back

Drag a column header and drop it here to group by that field

Customer #	Name	Address	Current Balance	Master Rmr	Sub Rmr	Open Service Ticket
51062	Francesca Lyons	63 Coleman Road	0.00	111.39	111.39	1
52195	Leo Lyons	12345 Main Avenue	0.00	0.00	0.00	0
Total:			\$0.00	\$111.39	\$111.39	Total: 1

10 items per page 1 - 2 of 2 items

Once the sub account customer record is displayed, you are able to navigate through all the tabs at the top as described earlier in this document.

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Home Site Listing RMR Invoices Payments Service Documents Settings Logout

Current Balance

\$0.00

Make a Payment

Last Payment: \$0.00
Received on:
Amount Past Due: \$0.00

Service Tickets

You Have 1 Open Service Tickets

[View Open Tickets](#)

Auto Bill Pay

Not enrolled
Next Payment on 04/01/2018

Paperless Billing

Not enrolled
[Sign Up](#)