Chain Accounts

The Chain Account is used to group customer accounts together where the customers are not financially related. This enables you to track your accounts as a group. If a Chain Account is assigned to certain customer records, you will be able to view the total accounts receivable and RMR for all of these grouped customers on one form. This is helpful in determining the total value of a Chain Account group. The Chain Account is a data entry field on the Customer edit. You may also use the Chain Account for reporting purposes using the Customer Query Builder function.

Here is how you start a Chain Account Group. GO to Sedona Setup > Chain Accounts. Create a Chain account name and Description.

Here is the customer profile. If this account was going to be part of a chain account, you would choose the name of the chain account under the drop-down menu Chain Account