Parent and Child Accounts

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Pathway: *Customer Service Screen (Accounts)*

To accommodate accounts with multiple sites where each require a separate AR History, an account can be established as a "Parent" account with child accounts linked to it. This allows each site to maintain its own AR Aging, while also providing added flexibility in areas such as billing.

Link a Child Account to a Parent Account

Linking child accounts to a parent account is a simple process that only requires entering the parent account's ID on the **Edit Account** screen for each child account.

Identification of Parent/Child Accounts

Once a parent/child link has been established between accounts, the linked account name and its parent/child relationship will display in parentheses next to the account currently being viewed. When viewing a parent account, the number of associated child accounts will display as a hyperlink to the Child Account List.

In this example, Tamarack Village is the parent account, and The Creamery is one of three child accounts associated with it.

View All Linked Child Accounts - Child Account List

To view all child accounts linked to a parent account, select the child account hyperlink. This will open the Child Account List, which includes a summary of each account's AR aging status.

Considerations for Parent/Child Setup vs Account/Site Setup

Before moving forward with Parent/Child account setup, consider some of the following:

Area of Impact	Account/Site Setup	vs.	Account/Account Setup (Parent/Child)
Account Contacts	A contact can be created for the account with access to all sites. This includes a billing contact.		An account contact and a billing contact must be added to the parent account and individually to all child accounts.
Portal Access	A contact can be given portal access to all sites when added as a contact for the account.		A contact must be added to the parent account and to all child accounts for portal access to be granted.
Notes	Account level notes display for all sites associated with the account.		Account level notes must be added to the parent account and to all child accounts.
AR History	The AR History screen displays the account's balance across all sites for services they have received.		AR History for the child accounts are not visible on the parent account.
AR Management	All sites feed into one AR Aging bucket at the account level.		Each child account will report independent of the parent account.
Auto Pay	Auto Pay is set up at the account level and applies to all sites.		Auto pay (if desired) must be added to the parent account and to all child accounts it applies.
Billing	Billing settings provide options to have all sites follow the billing process established at the account level with the flexibility to adjust site level invoice and billing settings.		All child accounts are set up independently of the parent account which includes invoice and billing settings.
Shared Services	If a location shares services with another location, which allows for billing to be split between the two, the locations must exist under the same account.		Shared services between accounts is not available.

| Blanket Purchase Orders | Blanket Purchase Orders are added to the account and made available to all associated sites, or exclusive to specific sites. These are also referred to as "Account Level PO's." | | Blanket purchase orders can not be shared from a parent account to a child account. |