

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.

The screenshot displays a customer account interface for 'Tamarack Village' (Account ID: 49731). The account is marked as 'Active' and has 3 child accounts. Key details include the address (202 Chieftain St, Osceola, WI 54020, US), terms (Net 20), and invoice delivery (Printed). The account manager is Aliena Somers. The aging schedule shows zero balances across all categories (CURRENT, 1-30, 31-60, 61-90, 91-120, 120+). Billing is set to 'ADVANCE - MONTHLY' with 'Billed Thru Date None'. A note indicates 'Auto Pay Not Enabled'. The interface also features sections for 'HIGHLIGHTS', 'ACTIVE SERVICES (0)', and a 'CALENDAR' for March 2026.

CURRENT	1-30	31-60	61-90	91-120	120+	TOTAL
0.00	0.00	0.00	0.00	0.00	0.00	0.00

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.

EDIT ACCOUNT

Account

Settings

NAME	Farm to Table	STATUS	Active
NAME 2		DIVISION	QAWA
ADDRESS LINE 1	202 Chieftain St	SOURCE	Call In
ADDRESS LINE 2		ACCOUNT MANAGER	Aliena
CITY/STATE/POSTAL CODE	Osceola WI 54020	ACCOUNT CLASS	COMM
PHONE	(201) 555-0123	AUDITOR	
ATTN		COLLECTION TYPE	
BILLING PHONE	(201) 555-0123	WEBSITE	
FAX	(201) 555-0123	LOGO	Select I
BILLING CONTACT 1		OLD ID	
BILLING CONTACT 2		ERP ID	
PARENT ACCOUNT	49731 Tamarack Village (Active)		

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.

+ 49731

Tamarack Village (3 child accounts)

202 Chieftain St
Osceola, WI 54020
US

TERMS
INVOICE DELIVERY

CURRENT
0.00

Active

DIVISION QAWASTE
ACCOUNT MGR Aliena Somers - Admin-NS (Sales)

HIGHLIGHTS

ACTIVE SERVICES (0) Standard

CALENDAR March, 2026

+ 49732

The Creamery (Parent: 49731 - Tamarack Village)

202 Chieftain St
Osceola, WI 54020

TERMS Net 20
INVOICE DELIVERY Printed

CURRENT	1-30	31-60	61-90	91-120	120+	TOTAL
393.33	0.00	0.00	0.00	0.00	0.00	393.33

Active

DIVISION QAWASTE
ACCOUNT MGR Aliena Somers - Admin-NS (Sales)
CLASS COMMERCIAL
BILL GROUP QA Billing Cycle

ADVANCE - MONTHLY Billed Thru Date Apr 30, 2026

Auto Pay Not Enabled

HIGHLIGHTS PENDING

ACTIVE SERVICES (1) Standard TOTAL RECURRING \$ 346.40

QTY	SERVICE CODE	SERVICE ID	LAST ACTIVITY	FREQUENCY
1	8 Yard Trash Service	39520		2x per week

CALENDAR March, 2026 EVENTS Appointment, AR, Cancellation, Complaint, E

SUN	MON	TUE	WED
Mar 1	Mar 2	Mar 3	

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.

The screenshot displays a software interface for account management. At the top, a header for 'Tamarack Village (3 child accounts)' is visible, with a red arrow pointing to the '(3 child accounts)' link. Below this, a 'CHILD ACCOUNT LIST' table is shown. The table has the following columns: ID, NAME, DIVISION, STATUS, SITE(S), CURRENT, 1-30, 31-60, 61-90, 91-120, 120+, and TOTAL. The data rows are as follows:

ID	NAME	DIVISION	STATUS	SITE(S)	CURRENT	1-30	31-60	61-90	91-120	120+	TOTAL
49732	The Creamery	QAWASTE	Active	1	393.33	0.00	0.00	0.00	0.00	0.00	393.33
49232	Caribou Coffee	QAWASTE	Active	2	-30.00	0.00	0.00	0.00	0.00	370.00	340.00
49733	Farm to Table	QAWASTE	Active	1	483.64	0.00	0.00	0.00	0.00	0.00	483.64
49731	Tamarack Village	QAWASTE	Active	1							
Total											1,216.97

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.
