



## Customer Child Accounts

Megan De Freitas - 2024-12-03 - System

### Overview

The Child Accounts tab on the Customer card allows the addition or removal of Child Accounts to the specified customer.

### Summary of Parent-Child Accounts

A national account is a combination of related customers that make up a single organization. Within the national account, the parent customer is the controlling organization. The parent customer has child customers, and the parent account is usually the customer that distributes payments on behalf of the child accounts.

A national account provides the ability to restrict payments for child customers, apply credit checking, place holds, and assess finance charges at a consolidated national account level.

Depending on the options selected when setting up the national account using the National Accounts Maintenance window in Dynamics GP, it is possible to pay the parent customer of a national account when creating a refund check for the child customer.

**Note:** Parent accounts must be configured within Dynamics GP in order for the Child Accounts functionality to work in SalesPad.

In National Accounts Maintenance in GP:

- Assign the customers
- Select the Parent/Customer IDs, and
- Enter one or more child customer IDs to assign

If there is more than one child account to set up, The “Allow Receipts Entry for Children of the National Account” option enables the entry of cash receipts for the child as well as the parent account.

**National Accounts Maintenance - TWO (sa)**

Save Clear Delete File Print Tools Help Add Note

Actions File Tools Help

Parent Customer ID: AARONFIT0001

Parent Name: Aaron Fitz Electrical

Options

- ☒ Allow Receipts Entry for Children of the National Account
- ☐ Base Credit Check on Consolidated National Account
- ☐ Apply Hold/Inactive Status of Parent Across National Account
- ☐ Base Finance Charge on Consolidated National Account
- ☐ Default Parent's Vendor for Children's Refund Checks

| Child Customer ID | Name               | Current Balance |
|-------------------|--------------------|-----------------|
| ADAMPARK0001      | Adam Park Resort   | \$20,800.09     |
| ADVANCED0001      | Advanced Paper Co. | \$327.08        |
|                   |                    | \$0.00          |
|                   |                    |                 |
|                   |                    |                 |
|                   |                    |                 |
|                   |                    |                 |
|                   |                    |                 |
|                   |                    |                 |

Select Children

Reports and inquiries throughout Receivables Management can provide consolidated information about the activity of a national account or provide details for an individual customer.

To become a member of a national account, a customer must be an open item customer.

The customer can be part of only one national account, as a parent or as a child.

#### Usage

Open a Customer Card and navigate to the Child Accounts tab.

Customer Properties

Customer: AARONFIT0001  
 Customer Name: Aaron Fitz Electrical  
 Cust Class: USA-ILMO-T1  
 Price Level: RETAIL  
 Pay Terms: NET 30  
 Sales Rep: West, Paul  
 Sales Terr:   
 Currency: Z-US\$  
 Trade Discount: 0.00%  
 Tax Reg Num:   
☐ Do Not Charge Freight  
 xSignature\_ 6/21/

Primary Address Information

One Microsoft Way  
 Grand rapids, MI 49888

Ship To Address Information

One Microsoft Way  
 Grand rapids, MI 49888

Default Shipping Information

Method LOCAL DELIVERY Whse:   
☐ Ship Complete  
☐ On Hold

Open Sales Documents

| Type              | Doc#       | Doc Date   | Batch     | Total    |
|-------------------|------------|------------|-----------|----------|
| ORDER             | ORDST2431  | 10/24/2018 | NEW ORDER | 20.99    |
| ORDER             | ORDST2387  | 7/31/2018  | NEW ORDER | 38.05    |
| FULFILLMENTORD... | FULORD1008 | 4/12/2017  | FULORD    | 192.45   |
| FULFILLMENTORD... | FULORD1006 | 4/12/2017  | FULORD    | 5,828.55 |
| FULFILLMENTORD... | FULORD1003 | 4/12/2017  | FULORD    | 49.85    |
| FULFILLMENTORD... | FULORD1000 | 4/12/2017  | FULORD    | 358.25   |

Recurring Sales Default Doc Items Special Pricing Saved Attributes Contract Pricing Email Audit **Child Accounts** Equipment Audit Item Sales Item Numbers Default Item Reps Group Pric

Add Remove

| Customer Number | Customer Name      | Parent Account |
|-----------------|--------------------|----------------|
| ADAMPARK0001    | Adam Park Resort   | AARONFIT0001   |
| ADVANCED0001    | Advanced Paper Co. | AARONFIT0001   |

From this tab, child accounts can be added or removed from the customer by clicking on the **Add** or **Remove** buttons.

Customer: [AARONFIT0001] Aaron Fitz Electrical

Close Refresh Save Print Dynamics GP STDQTE QUOTE STDORD ORDER STDINV INVOICE RTN RETURN

Customer Properties Primary Address Information Open Sales Documents

Customer: AARONFIT0001  
 Customer Name: Aaron Fitz E  
 Cust Class: USA-ILMO-T  
 Price Level: RETAIL  
 Pay Terms: NET 30  
 Sales Rep: West, Paul  
 Sales Terr:   
 Currency: Z-US\$  
 Trade Discount:   
 Tax Reg Num:   
☐ Do Not Charge Fre  
 xSignature\_ 6/2

Customer Lookup

Search Clear New

Search By

Customer: Contact: Phone: Sales Rep:   
 City: State: Zip: Statement Name:

Search Options

☐ Starts With  
☐ Show Inactive  
 Max Results: 10000

Search Results

| Addr Code | Cust# | Cust Name | Sales Person ID | Contact Sales Rep | Contact Name | Email | At |
|-----------|-------|-----------|-----------------|-------------------|--------------|-------|----|
| =         | =     | =         | =               | =                 | =            | =     | =  |

No data to display

Add Remove

Customer Number

ADAMPARK0001  
 ADVANCED0001

OK Cancel

Search for the desired child Customers, and click **OK**.

**Note:** If a Customer card is opened that has already been specified as a child account for another customer, the Add/Remove buttons will be disabled and a label showing the parent customer ID will be visible next to the Add/Remove buttons.

**Note:** Clicking on the parent customer ID will open that Customer card in a new window.

### Security

*AR Statement National Accounts* - Allows users to see and use the AR Statement (National Accounts) printed report.

*Customer Child Accounts* - Enable this to allow the use of the Child Accounts tab on the Customer card.

*National Account Plugin* - Enables the National Account Plugin on the Customer card actions button.