



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

Navigation: |< < > >|

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 Repts | 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

Customer Properties

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

Primary Address Information

One Microsoft Way

Open Sales Documents

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.