Customer Child Accounts

Cavallo Support - 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.

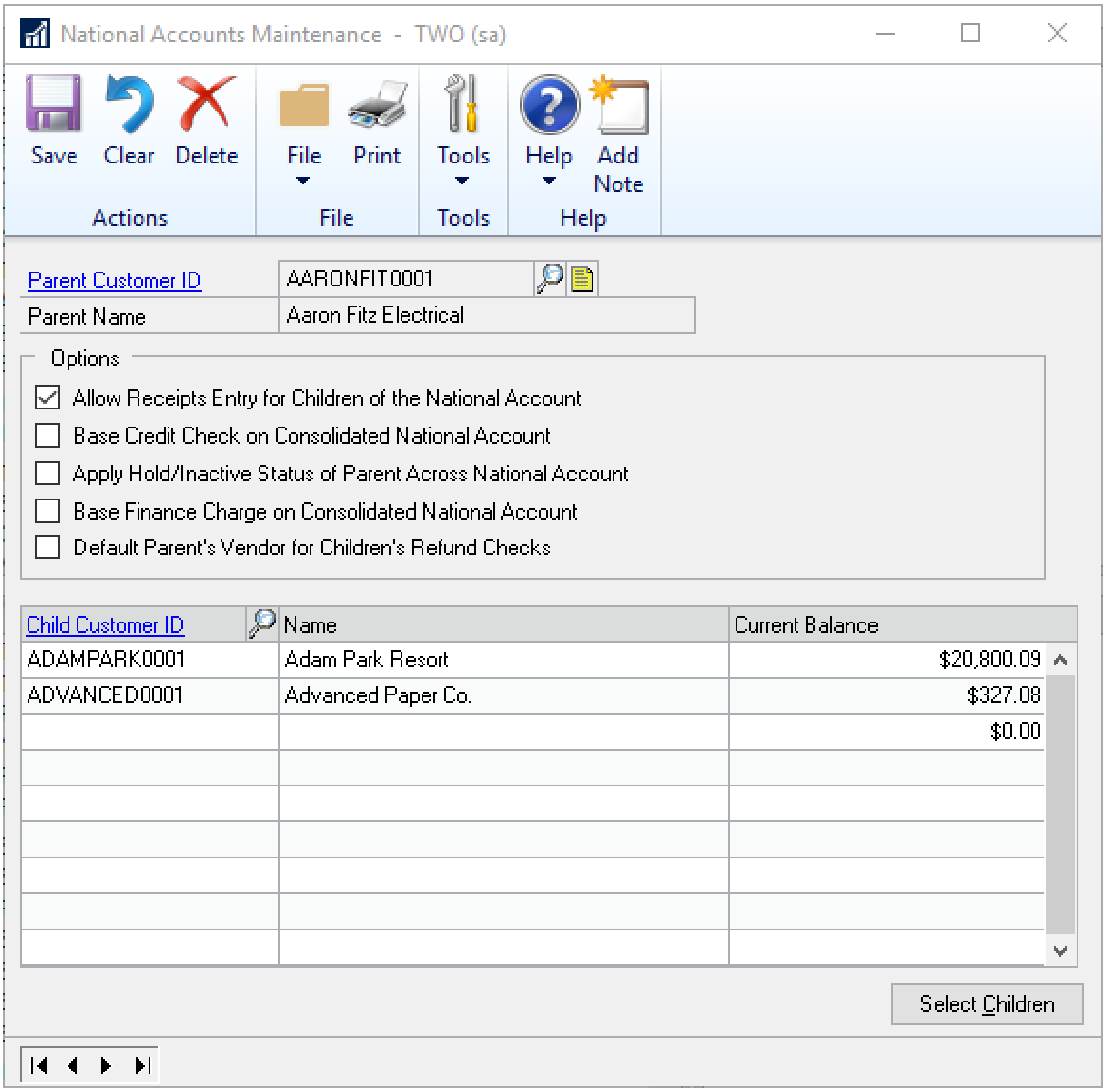
Depending on the options selected when setting up the national account using the National Accounts Maintenance window in Dynamics GP, it is possible to pay the parent customer of a national account when creating a refund check for the child customer.

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.



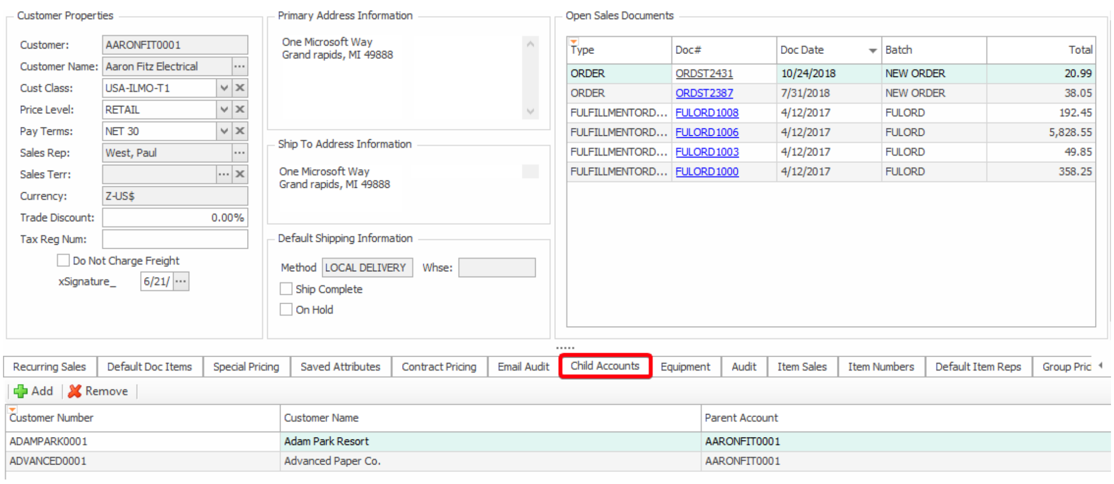
Reports and inquiries throughout Receivables Management can provide consolidated information about the activity of a national account or provide details for an individual customer.

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

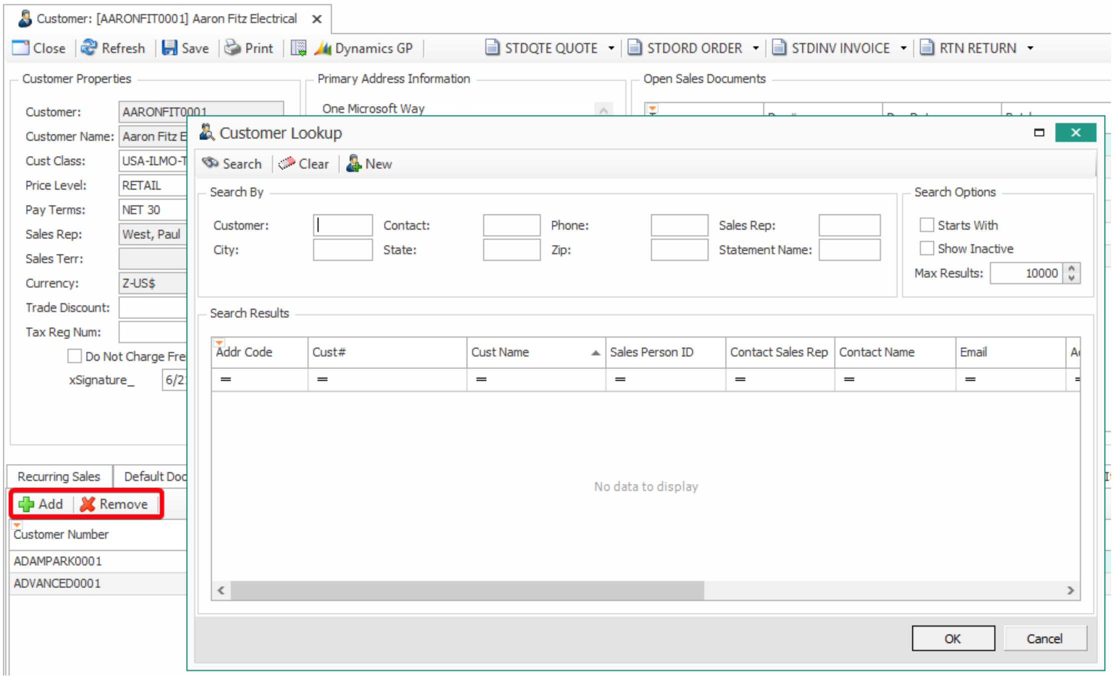
The customer can be part of only one national account, as a parent or as a child.

Usage

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



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



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.