

1. Master and sub-accounts

HeroTill now has the functionality to keep track of master accounts and sub-accounts. This will be especially useful in cases where you have companies with different branches that need to be linked to the master (main) profile. With this new functionality, you will also be able to decide whether each sub-account needs to be billed individually or whether all billing should be billed to the master account. If the only the master account is billed, then the master account will receive an individual invoice for each sub-account linked to that profile. If each sub-account is responsible for their own profile, then each sub-account will receive their own invoice.

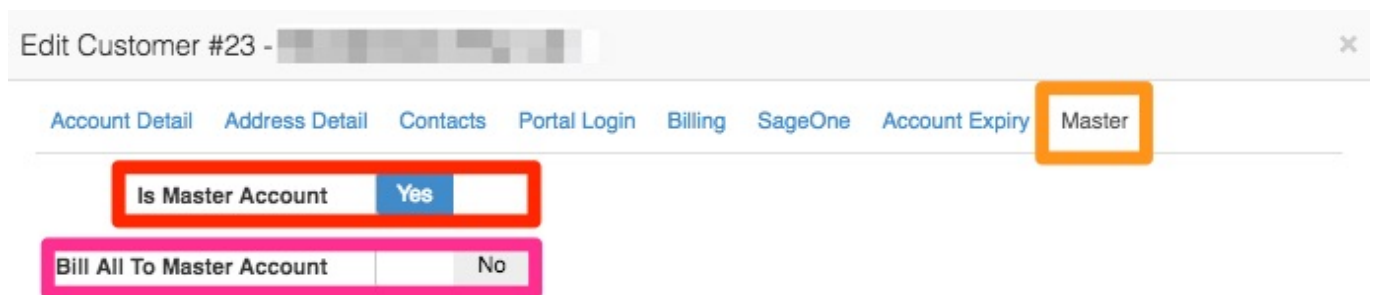
2. Master accounts

To be able to mark an account as a master account, you need to go to the customer's profile. Look for the "[Account Details](#)" section and then click on the "[Edit](#)" button.

Edit Customer

| | | |
|----------------------------|--------------|---------------------------|
| <div>Account Details</div> | | <div>Edit</div> |
| <div>Reset Password</div> | | <div>Request Update</div> |
| Customer Group | Other | |
| Account Code | WON001 | |
| Company Name | | |
| VAT Number | 090909090909 | |
| Primary Contact Name | | |
| Primary Contact Tel | 07999999999 | |
| Physical Address | | |
| Client Portal Username | WON001 | |

On the following screen, navigate to the “**Master**” tab. On this screen you will need to complete the following settings:

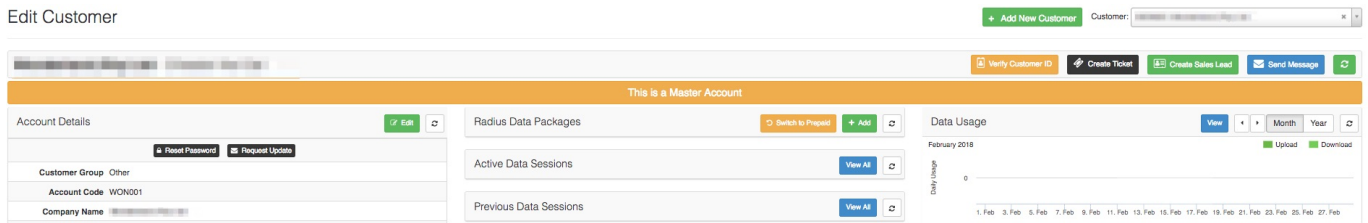


The screenshot shows the 'Edit Customer #23' interface. At the top, there is a navigation bar with tabs: Account Detail, Address Detail, Contacts, Portal Login, Billing, SageOne, Account Expiry, and Master. The 'Master' tab is highlighted with an orange box. Below the tabs, there are two toggle settings. The first, 'Is Master Account', has a red box around it and its toggle is set to 'Yes'. The second, 'Bill All To Master Account', has a pink box around it and its toggle is set to 'No'.

- Red:** To mark the customer as a “**Master Account**” switch the toggle button to yes.
- Pink:** If the master account should be billed for all the sub-accounts, switch the toggle button to **yes**. This means that the master account will receive an invoice for each sub-account linked to it.
- If each sub-account is responsible for their own account, leave the toggle button on **no**.

Click on the “**Save**” button found at the bottom of the screen to mark the customer as a master account. After the customer profile has been marked as a master account, an orange banner will appear on top of the customer profile to inform you that “**This is a Master Account**”.

Edit Customer

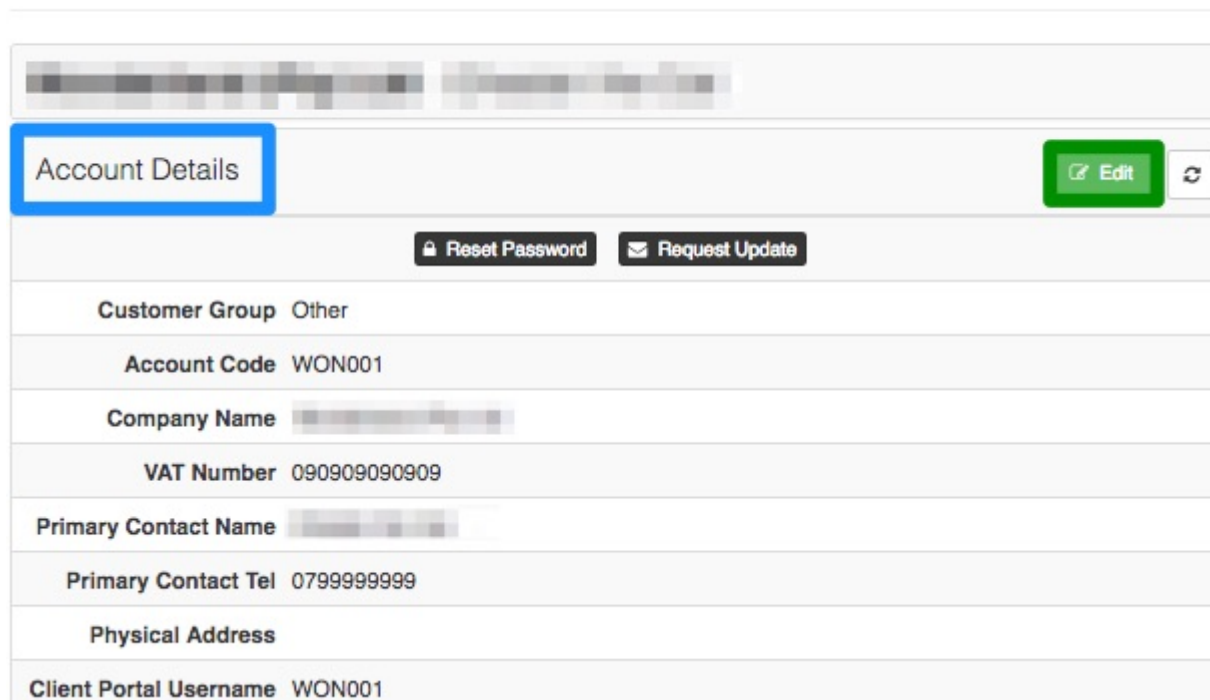


The screenshot shows the 'Edit Customer' interface. At the top, there's a header with 'Add New Customer' and a customer selection dropdown. Below this is a navigation bar with 'Verify Customer ID', 'Create Ticket', 'Create Sales Lead', and 'Send Message'. The main content area is titled 'This is a Master Account'. It features several sections: 'Account Details' with 'Edit' and 'Reset Password' buttons; 'Radius Data Packages' with 'Switch to Prepaid' and 'Add' buttons; 'Active Data Sessions' with a 'View All' button; 'Previous Data Sessions' with a 'View All' button; and 'Data Usage' with a 'View' button and a chart for February 2018.

3. Sub-accounts


To link a sub-account to a master account, you will need to go to the **master account** profile. From there, go to the “**Account Details**” section and then click on the “**Edit**” button.

Edit Customer



This screenshot shows the 'Edit Customer' page with the 'Account Details' section highlighted by a blue box. The 'Edit' button in the top right of this section is highlighted by a green box. Below the 'Account Details' section are buttons for 'Reset Password' and 'Request Update'. The form fields include: 'Customer Group' (Other), 'Account Code' (WON001), 'Company Name' (redacted), 'VAT Number' (090909090909), 'Primary Contact Name' (redacted), 'Primary Contact Tel' (07999999999), 'Physical Address' (redacted), and 'Client Portal Username' (WON001).

On the following screen, navigate to the “**Sub Accounts**” tab. On this screen you will need to complete the following settings:

Edit Customer #23 - 

This is a Master Account

[Account Detail](#) [Address Detail](#) [Contacts](#) [Portal Login](#) [Billing](#) [SageOne](#) [Account Expiry](#) [Master](#) [Sub Accounts](#)

Show Rows + Add Refresh Search:

| ID | Acc Code | Customer Name | Contact Number | Contact Email |
|----------------------------|----------|---------------|----------------|---------------|
| No data available in table | | | | |

Showing 0 to 0 of 0 entries Previous Next

Close Password Reset Delete Disable Save Changes

Click on the “**Add**” button to link a sub-account to the master account. On the pop-up screen, look for the relevant **customer** in the drop-down menu and then click on the “**Add**” button.

Add Sub Account

Sub Account

ALI001-


×

▼

Cancel

Add




After you have added a sub-account, you will see the following screen:

Edit Customer #23 - 

This is a Master Account

[Account Detail](#) [Address Detail](#) [Contacts](#) [Portal Login](#) [Billing](#) [SageOne](#) [Account Expiry](#) [Master](#) [Sub Accounts](#)

Show Rows + Add Refresh Search:

| ID | Acc Code | Customer Name | Contact Number | Contact Email |
|----|----------|---|---|--|
| 22 | ALI001 |  |  |  |

Showing 1 to 1 of 1 entries Previous 1 Next

Close Password Reset Delete Disable Save Changes

You will now be able to view a **list** of all sub-accounts linked to the master profile with their contact details. To go to that particular sub-account's customer profile, click on the **black** button found on the right-hand side. To remove a sub-account from a master account, click on the **red x**. Remember to click on "**Save Changes**" after adding or removing sub-accounts from the master account.

After marking a profile as a sub-account, the sub-account will have a banner on top of the profile to mention that "**This is a Sub-Account of (master account name)**".

Edit Customer

+ Add New Customer Customer: [dropdown]

Verify Customer ID Create Ticket Create Sales Lead Send Message

This is a Sub-Account of [master account name]

| | | |
|--|--|---|
| Account Details [Edit] [Reset Password] [Request Update] | Radius Data Packages [Switch to Proposal] [Add] [Change] | Data Usage [View] [Month] [Year] [Upload] [Download] |
| Customer Group: Other Account Code: EDD001 ID Number: [text] Primary Contact Name: [text] | Username: [text] Package: (10 Mbs down, 10 Mbs up, 200 GB Monthly) Active Data Sessions [View All] | February 2018 Daily Usage [line graph] 1. Feb 3. Feb 5. Feb 7. Feb 9. Feb 11. Feb 13. Feb 15. Feb 17. Feb 19. Feb 21. Feb 23. Feb 25. Feb 27. Feb |

4. Billing

With the master and sub-accounts function, you have the option to either bill all to the master account or bill each sub-account individually. This is set up when the profile is originally marked as a master account (refer to section 2).

4.1. Bill all to master account:

When bill all to master account is enabled, all invoices from sub-accounts will be made out to the master account. Your invoices for will look similar to the screenshot below:

TAX INVOICE

INV NUMBER: INV0000055
 ACCOUNT CODE: JEN001
 ORIGIN REF: EDD001
 INV DATE: 2018-02-28
 DUE DATE: 2018-03-05

FROM

VAT NO:

POSTAL ADDRESS:

PHYSICAL ADDRESS:

TO

CUSTOMER VAT NO:

POSTAL ADDRESS:

PHYSICAL ADDRESS:

| Type | Description | Qty | Incl Price | Disc % | Incl Total | VAT | Excl Total |
|-----------|-------------------|------|------------|--------|------------|-----|------------|
| BANDWIDTH | 10Mb/s Uncapped - | 1.00 | | 0.00% | | | |

Bank:
 Account No:
 Branch Name:
 Branch Code:

Total Exclusive: R
 Total VAT: R
 Total Inclusive: R

In the **pink** section, you will be able to see the master profile's account code, as well as the "**Origin Ref**" which will be the account code of the sub-account from which this invoice was generated. As mentioned above, when the bill all to master account function is enabled, all sub-account invoices will be made out to the master account. You will be able to view the master account's details in the **orange** section.

4.2. Bill each sub-account individually

When bill all to master account is disabled, all sub-account invoices will be made out to the sub-account instead of the master account. Your invoices for will look similar to the screenshot below:

TAX INVOICE

| | |
|---------------|------------|
| INV NUMBER: | INV0000056 |
| ACCOUNT CODE: | ALI001 |
| INV DATE: | 2018-02-28 |
| DUE DATE: | 2018-03-05 |

FROM

TO

VAT NO:

CUSTOMER VAT NO:

POSTAL ADDRESS:

PHYSICAL ADDRESS:

POSTAL ADDRESS:

PHYSICAL ADDRESS:

| Type | Description | Qty | Incl Price | Disc % | Incl Total | VAT | Excl Total |
|-----------|-----------------|------|------------|--------|------------|-----|------------|
| BANDWIDTH | 10Mb/s capped - | 1.00 | | 0.00% | | | |

Bank:
Account No:
Branch Name:
Branch Code:

Total Exclusive:

Total VAT:

Total Inclusive:

You will notice that this invoice will look like the normal monthly invoices that your ISP sends out. In the **blue** section, you can see that the invoice is made out to the sub-account and not a master account as there is no origin ref section as per section 4.1.

4.3. Suspending customers for non-payment

Before suspending master accounts or their sub-accounts, it is suggested that there is good and clear understanding with regards to non-payment, overdue accounts and suspensions. With the new suspension module, you now have the ability to either suspend single sub-account or to bulk suspend the master account and all sub-accounts linked to their profile.

For more information on how to use the new suspensions module, please refer to the suspension manual.