


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.

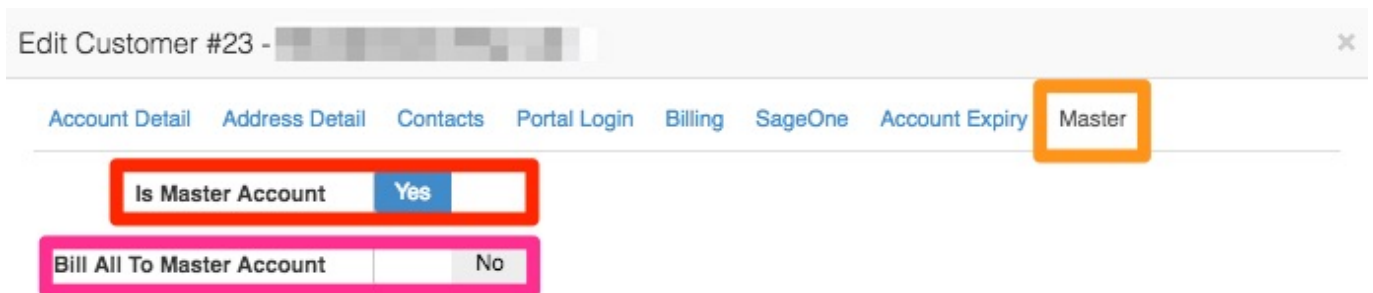
2. Master accounts

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

[Redacted]	
Account Details	Edit 
Reset Password Request Update	
Customer Group	Other
Account Code	WON001
Company Name	[Redacted]
VAT Number	090909090909
Primary Contact Name	[Redacted]
Primary Contact Tel	0799999999
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:

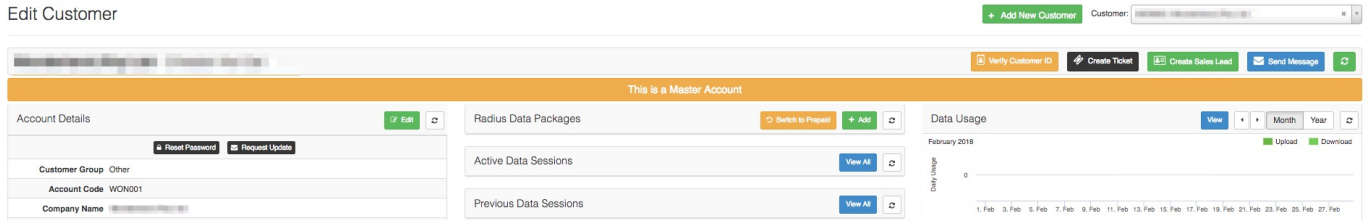


The screenshot shows the 'Edit Customer #23' interface. At the top, there is a navigation bar with tabs: 'Account Detail', 'Address Detail', 'Contacts', 'Portal Login', 'Billing', 'SageOne', 'Account Expiry', and 'Master'. The 'Master' tab is highlighted with an orange box. Below the navigation bar, there are two toggle switches. The first toggle, labeled 'Is Master Account', is highlighted with a red box and is currently set to 'Yes'. The second toggle, labeled 'Bill All To Master Account', is highlighted with a pink box and is currently 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

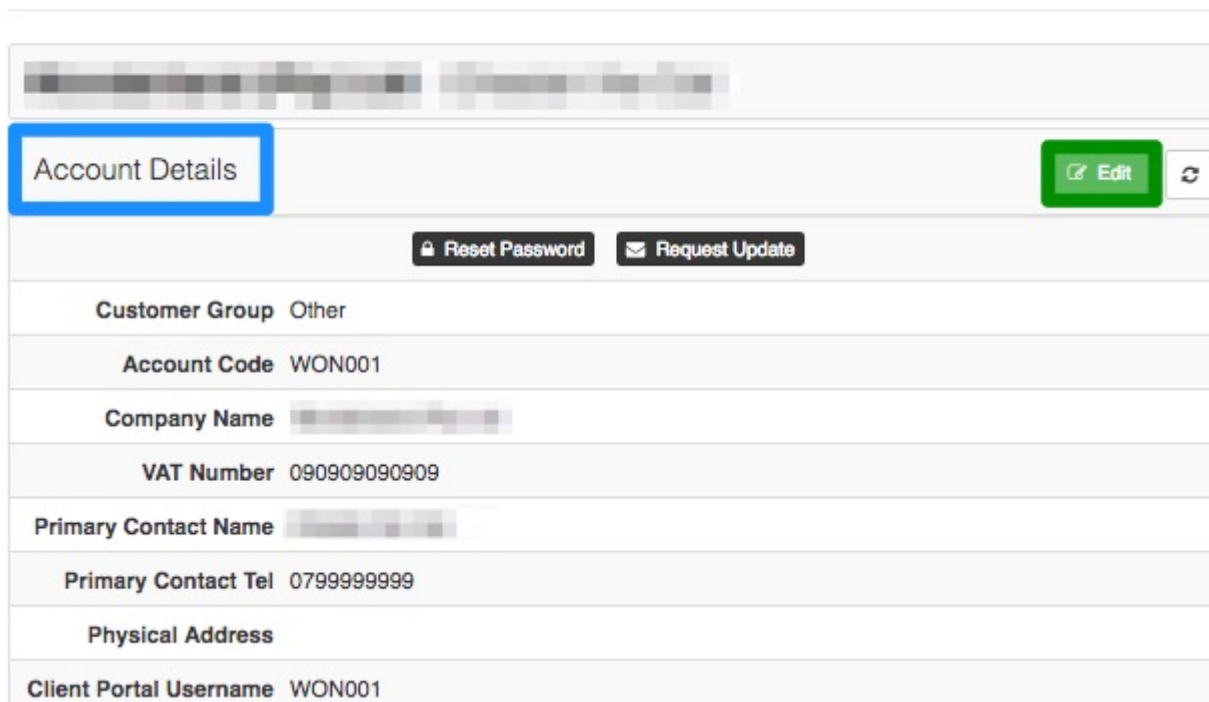


The screenshot shows the 'Edit Customer' interface. At the top, there's a header with 'Add New Customer' and a customer selection dropdown. Below that, a navigation bar includes 'Verify Customer ID', 'Create Ticket', 'Create Sales Lead', and 'Send Message'. The main content area is titled 'This is a Master Account' and is divided into several sections: 'Account Details' (with 'Edit' and 'Reset Password' buttons), 'Radius Data Packages' (with 'Switch to Prepaid' and 'Add' buttons), 'Active Data Sessions' (with 'View All' button), 'Previous Data Sessions' (with 'View All' button), and 'Data Usage' (with 'View', 'Month', 'Year' filters and 'Upload/Download' options). The 'Account Details' section shows fields for Customer Group (Other), Account Code (WON001), and Company Name.

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 focuses on the 'Account Details' section of the 'Edit Customer' page. The 'Account Details' tab is highlighted with a blue box. To its right is a green 'Edit' button with a refresh icon. Below the tab are two buttons: 'Reset Password' and 'Request Update'. The account details are listed in a table-like format:

Customer Group	Other
Account Code	WON001
Company Name	[Redacted]
VAT Number	090909090909
Primary Contact Name	[Redacted]
Primary Contact Tel	0799999999
Physical Address	[Redacted]
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 - [blurred] x

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
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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- 	×	▼
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Cancel

Add

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

Edit Customer #23 - [REDACTED] ✕

This is a Master Account

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

Show Rows + Add ↻ Refresh Search:

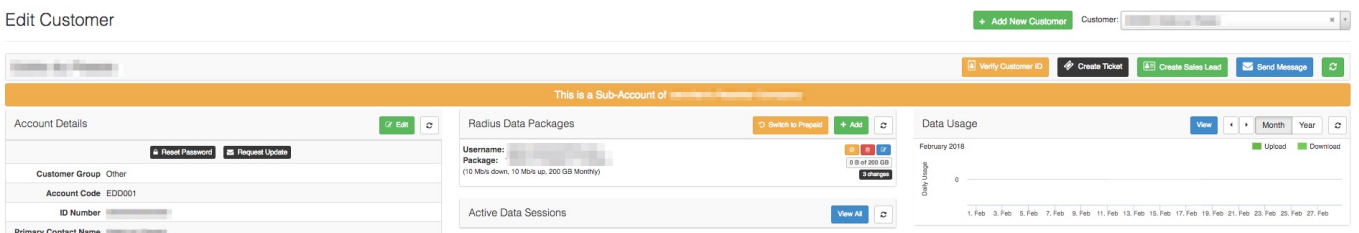
ID	Acc Code	Customer Name	Contact Number	Contact Email
22	ALI001	[REDACTED]	[REDACTED]	[REDACTED]

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)**".



The screenshot displays the 'Edit Customer' page. At the top, there is a header with '+ Add New Customer' and a 'Customer:' dropdown. Below this is a navigation bar with buttons for 'Verify Customer ID', 'Create Ticket', 'Create Sales Lead', and 'Send Message'. A prominent orange banner across the top of the main content area reads 'This is a Sub-Account of [Master Account Name]'. The main content is divided into three sections: 'Account Details' (with 'Reset Password' and 'Request Update' buttons), 'Radius Data Packages' (with 'Switch to Proposal' and 'Add' buttons), and 'Data Usage' (with a 'View' button and a chart for February 2018). The chart shows daily usage for the month, with a 'Daily Usage' label on the y-axis and dates from 1. Feb to 27. Feb on the x-axis. There are also 'Upload' and 'Download' buttons for the data usage chart.

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.