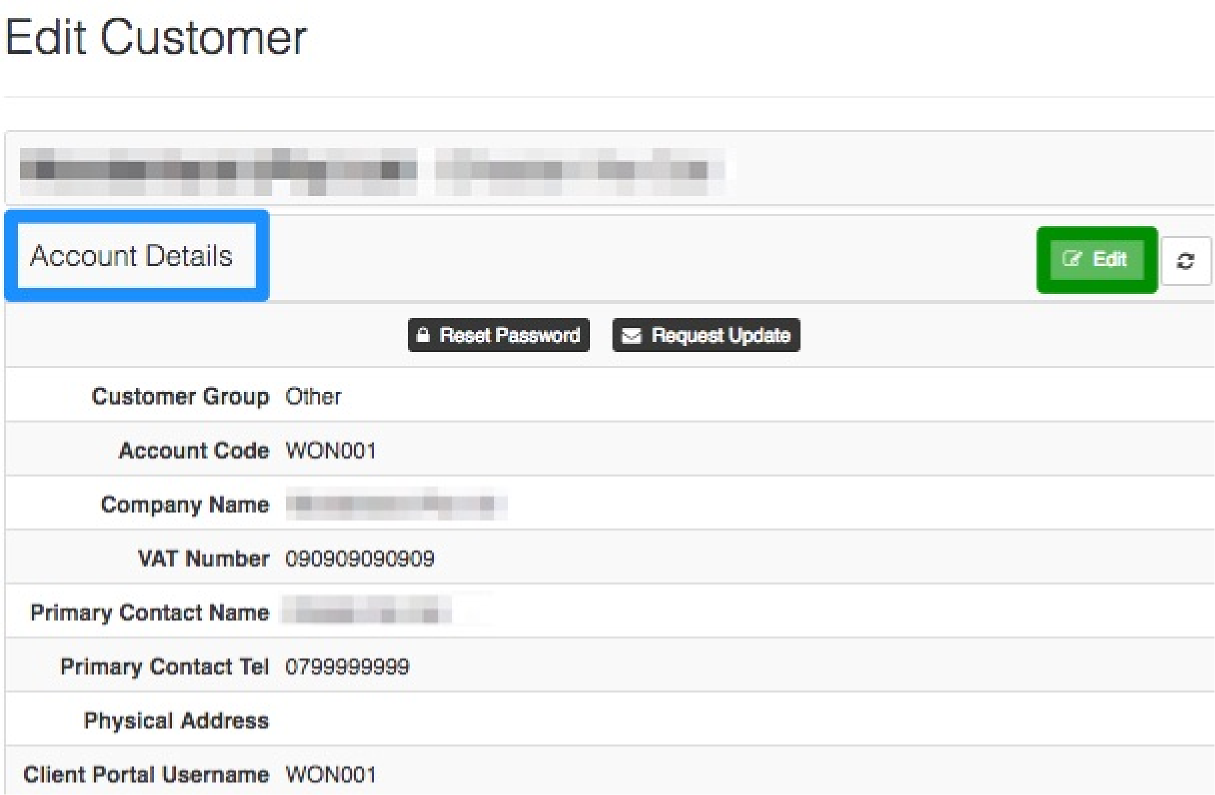
1. Master and sub-accounts

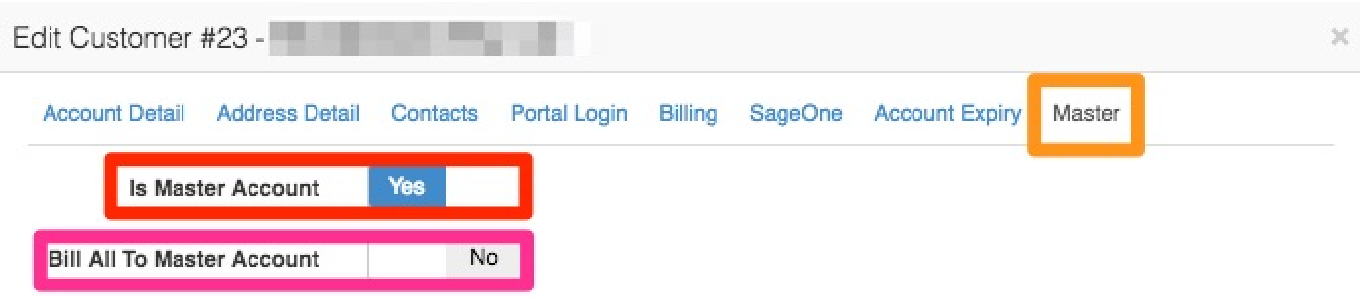
HeroTill now has the functionality to keep track of master accounts and sub-accounts. This will be especially useful in cases where you have companies with different branches that need to be linked to the master (main) profile. With this new functionality, you will also be able to decide whether each 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
Account Details
Edit
Reset Password
Request Update
Customer Group Other
Account Code WON001
Company Name
VAT Number 090909090909
Primary Contact Name
Primary Contact Tel 0799999999
Physical Address
Client Portal Username WON001

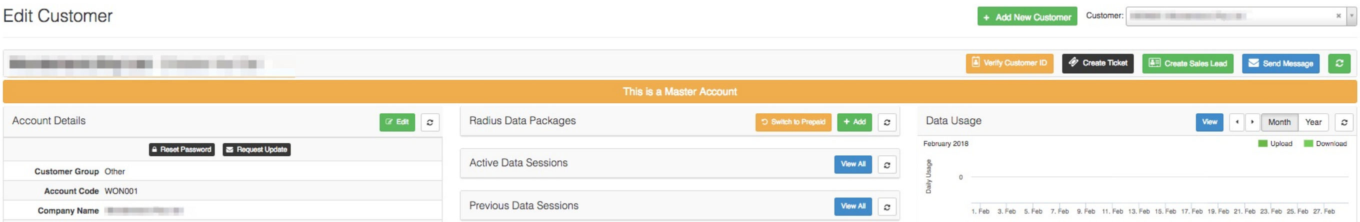
On the following screen, navigate to the "**Master**" tab. On this screen you will need to complete the following settings:



Red: To mark the customer as a "**Master Account**" switch the toggle button to yes.

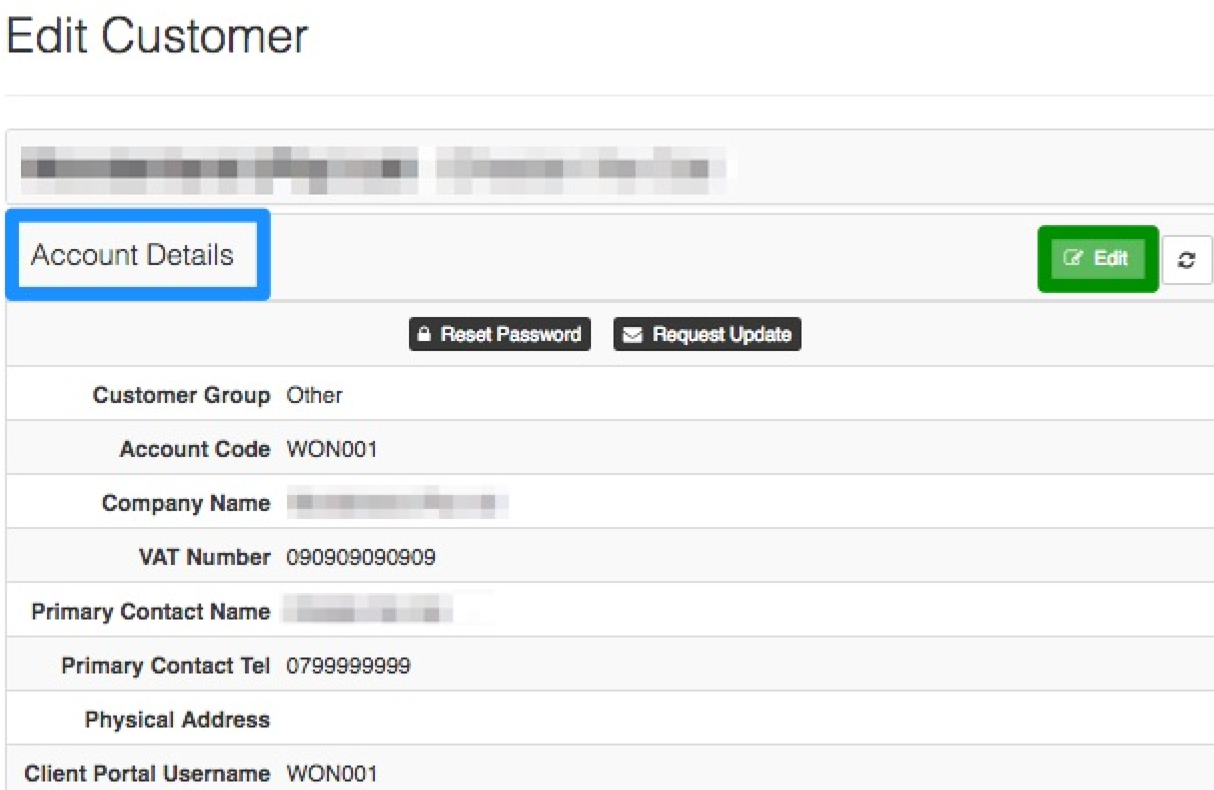
Pink: If the master account should be billed for all the sub-accounts, switch the toggle button to **yes**. This means that the master account will receive an invoice for each sub-account linked to it.
If each sub-account is responsible for their own account, leave the toggle button on **no**.

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**".

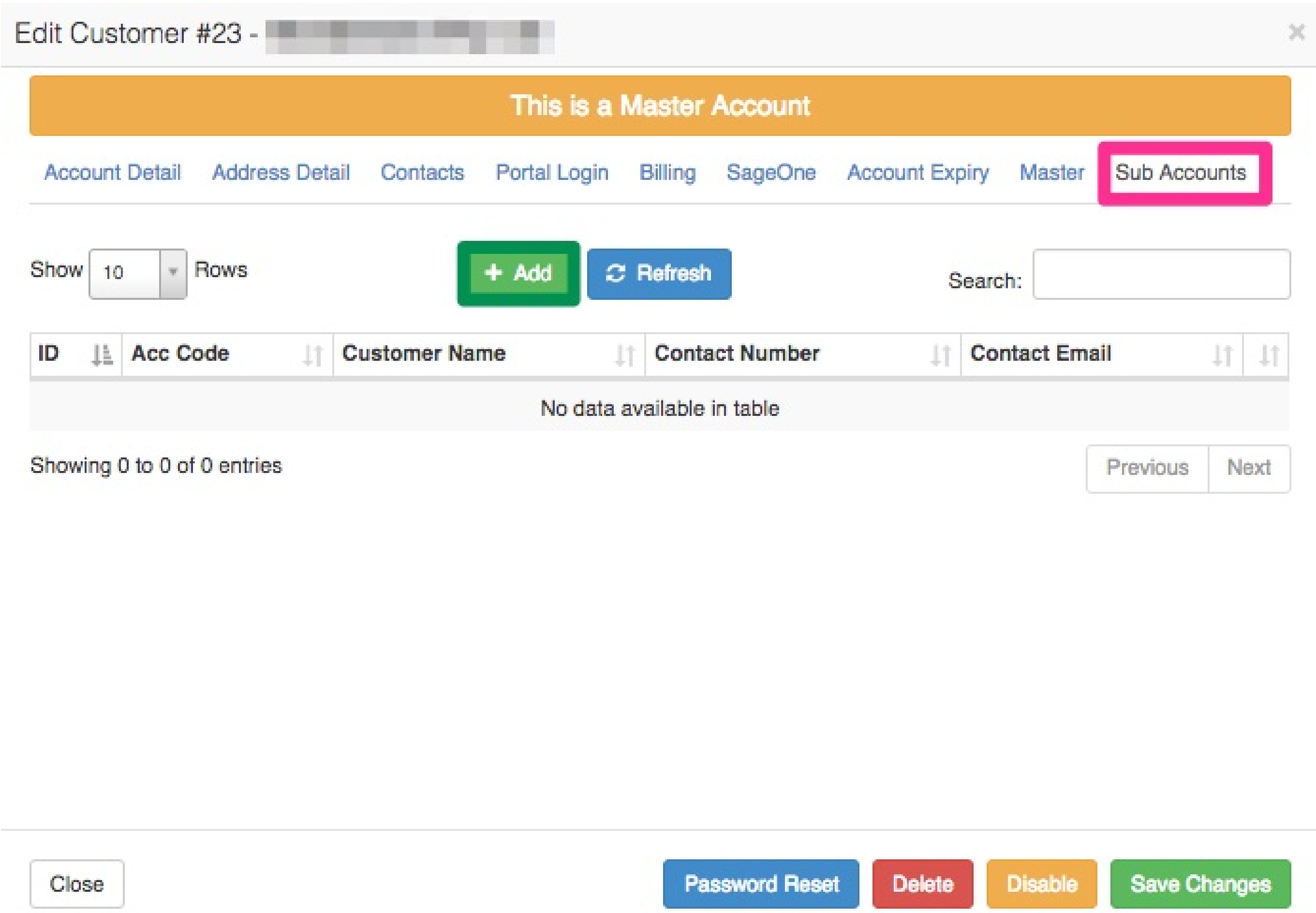


3. Sub-accounts

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.

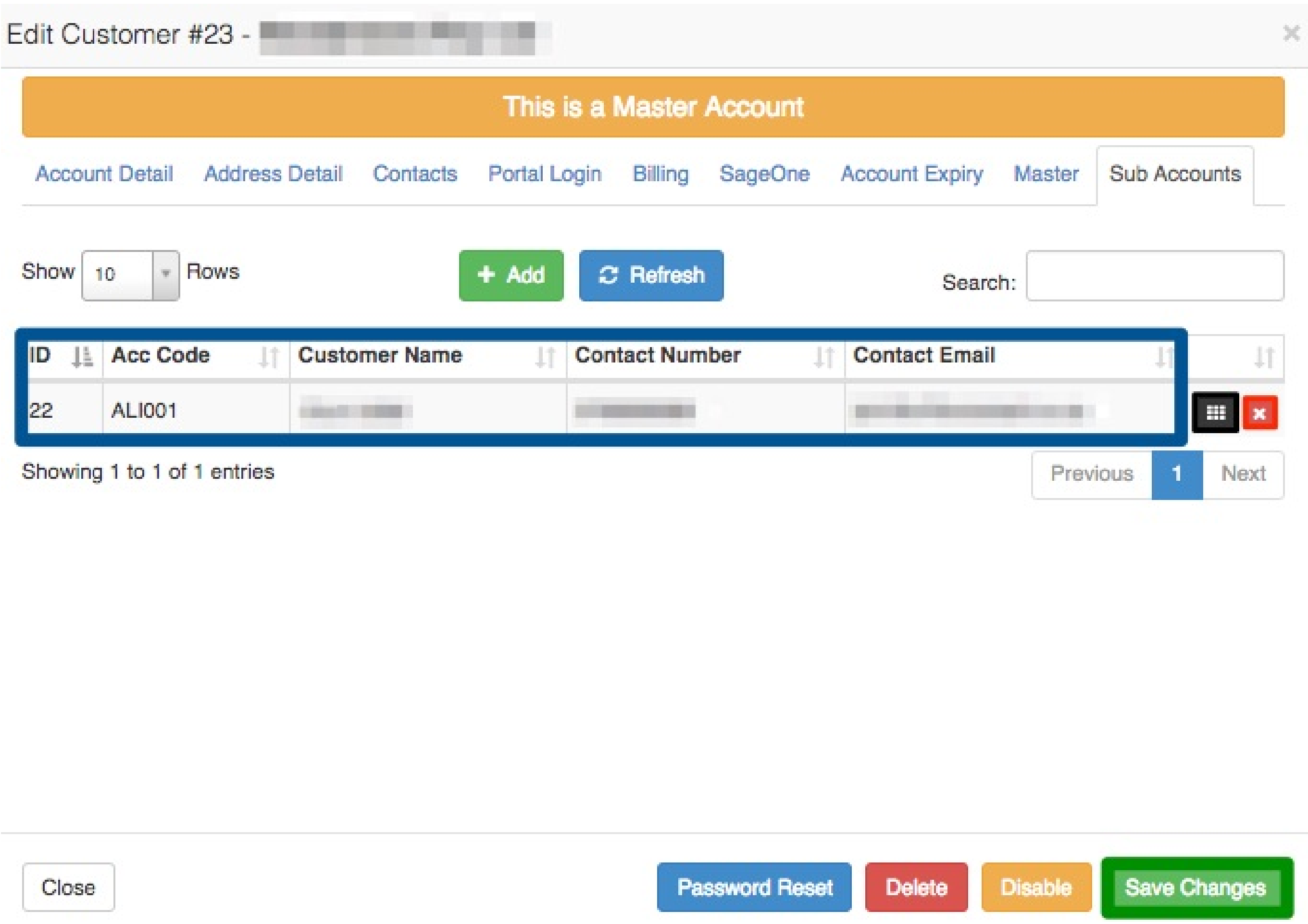


On the following screen, navigate to the “**Sub Accounts**” tab. On this screen you will need to complete the following settings:


Edit Customer #23 -
This is a Master Account
Account Detail
Address Detail
Contacts
Portal Login
Billing
SageOne
Account Expiry
Master
Sub Accounts
Show 10 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

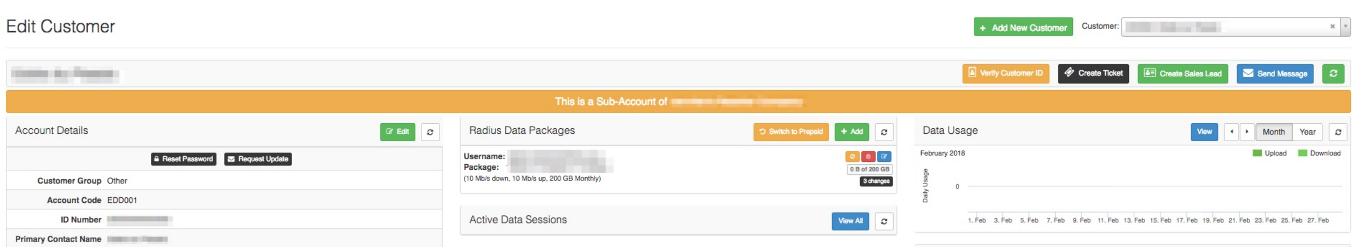
Click on the "**Add**" button to link a sub-account to the master account. On the pop-up screen, look for the relevant **customer** in the drop-down menu and then click on the "**Add**" button.

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



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)**".



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

[redacted]

CUSTOMER VAT NO:

POSTAL ADDRESS:

PHYSICAL ADDRESS:

[redacted]

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

Bank:
Account No:
Branch Name:
Branch Code:

Total Exclusive:	R [redacted]
Total VAT:	R [redacted]
Total Inclusive:	**R** [redacted]

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

VAT NO:

POSTAL ADDRESS: PHYSICAL ADDRESS:

TO

[illegible]

CUSTOMER VAT NO:

POSTAL ADDRESS: PHYSICAL ADDRESS:

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

Bank:
Account No:
Branch Name:
Branch Code:

Total Exclusive:	[illegible]
Total VAT:	[illegible]
Total Inclusive:	[illegible]

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 so either suspended 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.