

How To View Sub-Accounts in Customer Portals

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Issue:

Customers with Master Accounts are unable to see their invoices in their portal. How do they view the invoices if the invoices are not directly associated with the Master Account?

Resolution:

For customers with Master Accounts to view invoices, they will need to link the Sub-Customer Account to their Master Customer Account Login. The reason for this is due to Master Customers lacking Sites, which is what the invoices are associated with. While you can view the invoices on the Master Account in SedonaOffice, in the Customer Portals, the Sub-Accounts are seen as separate customer accounts.
