

How To Convert a Standard Account to a Subaccount

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Customer Account

From the Customer Account that needs to be converted to a Subaccount, Right-click on Customer Information.

Select Edit Customer Setup.

Under the Master Account Information Section select the drop down menu by Master Account.

Select the Master Account.

Save.

The screenshot shows the 'Customer Setup 10024-8' window. The 'Master Account Information' section is active, showing a dropdown menu for 'Master Acct' with '10024' selected. Below the dropdown is a table of available master accounts. The 'Save' button is highlighted with a red box.

Master Account	Master Account Name
10020TEST	Test Master
10024	Hoffman Auto Group
10024-33	Tiffany Aucoin
10248	West Plymouth Public Schools
1025	Diocese of Cleveland
10510	King Kohl
10968	Hawkins Properties LLC

