

How To Convert a Subaccount to a Standard Customer

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Customer Account

From the Customer Account that needs to be converted to a Standard Customer, 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 Blank Field at the top of the menu.

Save.

Customer Setup 10024-8

Customer #

10024-8

Customer Name

Hoffman Auto Standard Customer

Additional Name

Another Hoffman Location

8814 Miller Rd

Canton, MI 48187

Setup Information

Custom Fields (Customer)

Bill To

Master Account Setup

Items

Customer Status

ANR

Customer Type

Residential

Old Customer ID

Terms

Due On Receipt

Tax Exempt #

EIN

OK to Increase

Salesperson

carolynj

Blanket P.O.

P.O. Expire Date

Customer Since

9/28/1999

Chain Account

Customer Group

01

Customer Group 2

Branch

MI

Invoice Group

None

No Collections

☐

Part Pricing Level

None

Registration Code

662E43

Master Account Information

Invoice Printing

Master Acct

Print Statements

Print Site Info on Invoices

Master Account

Master Account Name

Each Site

10020TEST

Test Master

10024

Hoffman Auto Group

10024-33

Tiffany Aucoin

10248

West Plymouth Public Schools

1025

Diocese of Cleveland

10510

King Kail

10968

Hawkins Properties LLC

Critical Message

Expires On

Save

Close