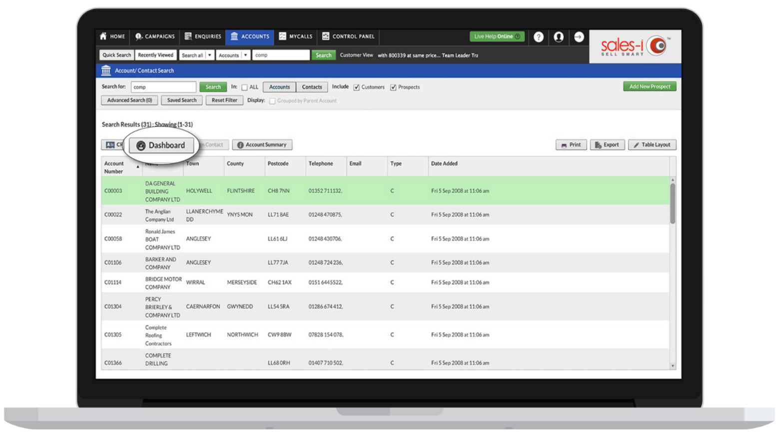
HOW TO VIEW A PARENT ACCOUNT WITH ALL SUB ACCOUNTS IN ONE GO

This how to guide will show you how to get a company overview by rolling up all of the 'child'/'ship to' accounts that are associated into one parent account.

01 Search for the company you want to view using the search field and green **Search** button at the top of the screen.

By default **Search** looks at full or partial account names and numbers.



02 Click on the relevant company from the results list so it highlights green, and then click the **Dashboard** icon to open the company's dashboard page**.**

03 In the top center of the dashboard page, tick the **Account Rollup** box. This will load all sub account details into one view.

Please Note: You also have the ability to rollup to the Parent Account on the CRM and Snapshot report.