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.

Grid Seath Assets Vo	ed Seathat • Noovis • He control	Search	Training will chartly be available to book		III	inni 🕓
Rone - Duritourd	PLinuty 207-PErformence 207					
Q Eato Filter						
Onlineard Mancas	parlson Targel Sales Activity Career	and Post	-			
Top 5-Customers		4.54	Top 5 Product Group Level 1	4.54	Top 5 Products	6 Sa
		Tate +		PirDet *		Befoat *
Cada	Avenue Sale	Vibr		hitty	E26.000.00	
(100 m	(AARACIME) (1) (1)	100		6363637	CRUM	
CEDAR	(Analysis Parties 14)	545.4			0408	
cmus	(Bestah Seatorn US) + (4)	448.30			CRUMM	
CHINES	Lamen & Sona Bulders	294.57	87954631		ACTOR ACTION	
CH1573	Whee & Pale	883.15		insimulation and a second s	10202	
					In a second second second second second	and a second
			matry	Abery	MCORTERORY MURICIC MODEL	person com
			D-GH13	and the second	Con Diversion	
Top 3 Parent Assounts		4 G.	Saved Account Bearch	4.54	Savel Enguites	65
		Bufut 1				
646,000.00		and the second second	Actual law Consequences property	0		
03.06.0			A Start Starts - California Will for an an annual	0	Fundure North Stating Layrian	•
100.000			Assard Starth - House Bulley	0	Full Polare-bal month-gend for cultures (ruling and complete)	•
			Account Search - Project B	0	FallPolare-Protect steppy to profit	0.0
			Acourt Sorth - Edgers Tot	0	FailPdare-Bail day samh	٩
Laborator			Accest Search-Res Devillar - Monkey	0	FallPidare-Top performing locarch by profile	0
					Fail/Fidure: Tap performing product sales year to date	0
0.0	a BushSupton/D	Wardine			Yartance - Accounts falling is building selec YT21	٥
	Exalboritación Janual South	dan Mindada			Variance - On's Samuel Laks Rep Rigards VED	8
						G Rest/faib to Default

Access/Contact Search											
Search for:	comp earch (3) Seved 5	Search Search Rese	In: ALL	Accounts	Centects Inclus	le 🕑 Custome	n 🕑 Praspects		Add New Prospect		
Search Resu	Dashboard	-31)	O Account	tSummary					🙀 Print 👔 Export 🖉 Table Layout		
Account		Town	County	Postcode	Telephone	Enal	Туре	Date Added			
C00003	DA GENERAL BUILDING COMPANY LTD	HOLYWELL	FLINTSHIRE	CH8 7NN	01352 711132.		c	Fri 5 Sep 2008 at 11:06 am	Í		
C00022	The Anglian Company Ltd	LLANERCHYME	YNYS MON	LL718AE	01248 470875.		с	Fri 5 Sep 2008 at 11:06 am			
C00058	Ronald James BOAT COMPANY LTD	ANGLESEY		U.61.6U	01243430706		c	Fri 5 Sep 2008 at 11:06 am			
C01106	BARKER AND COMPANY	ANGLESEY		LL777,JA	01248724236.		с	Fri 5 Sep 2008 at 11:06 am			
C01114	BRIDGE MOTOR COMPANY	WIRRAL	MERSEYSIDE	CH621AX	0151 6445522.		c	Fri 5 Sep 2008 at 11:06 am			
C01304	PERCY BRIERLEY & COMPANY LTD	CAERMARFON	GWYNEDD	LL545RA	01285 674 412,		с	Fri 5 Sep 2008 at 11.06 am			
C01305	Complete Roofing Contractors	LEFTWICH	NORTHWICH	CW988W	07828 154 078.		c	Fri 5 Sep 2008 at 11:06 am			
c	COMPLETE			LLAROPH	01407 710 502		c	Fri 5 Sen 2008 at 11 Okam			

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.

