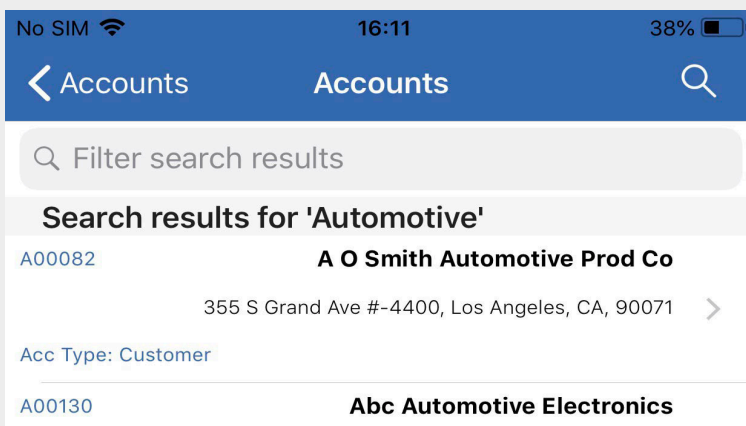


HOW TO VIEW A PARENT ACCOUNT WITH ALL SUB ACCOUNTS IN ONE GO ON YOUR APPLE DEVICE

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

01 From the home page, use the **Quick Search bar** to find your desired account by searching for the (full or partial) account number or name.



02 Tap on the relevant company from the results list to view their account card.

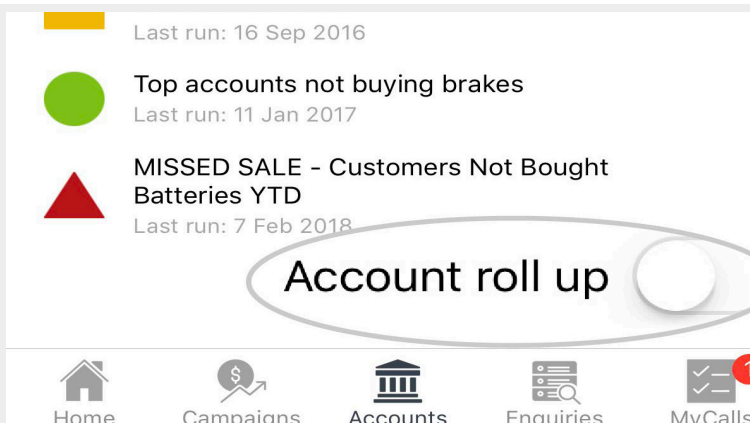
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Customer Analysis (3) >

Insights v

Follow-up call note

03 Tap on **Insights** to view a summary of this account's spend.



04 Tap the **Account roll up** slider to roll up the sub-accounts' spend into the parent account.

Please Note: You can also roll up to the Parent Account on the CRM (e.g. Contacts, Call History Notes) and Snapshot report.