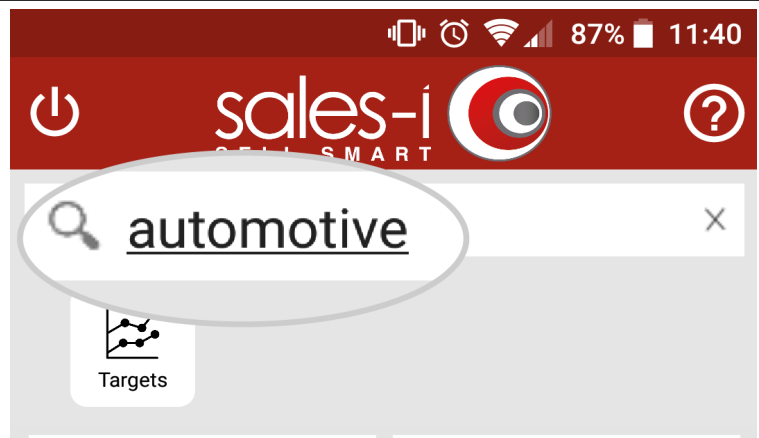


HOW TO VIEW A PARENT ACCOUNT WITH ALL SUB ACCOUNTS IN ONE GO ON YOUR ANDROID DEVICE

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.



Filter search results

A O Smith Automotive Prod Co A00082
355 S Grand Ave #-4400, Los Angeles, CA, 90071

Abc Automotielectronics A00130
4640 N Broad Philadelphia, PA, 19140

Accurate automotive & Trek Dr A00152

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

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

215-457-9859

Customer Analysis Fields (3) >

Insights >

ACTIONS

10:40

Account roll up

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.

ACTIONS

GENERATE
SNAPSHOT

ENQUIRIES

CAMPAIGNS