



Paladin Parent and Sub-accounts Help Manage Customer Accounts

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**WHAT YOU'LL
LEARN**

- Managing Business Accounts in Paladin
- Creating customer accounts
- Setting up Parent accounts
- Adding Sub-accounts
- Managing Sub-accounts in Customer Module

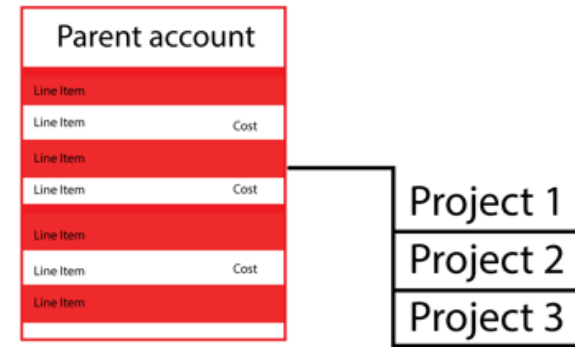
Managing B2B accounts in Paladin



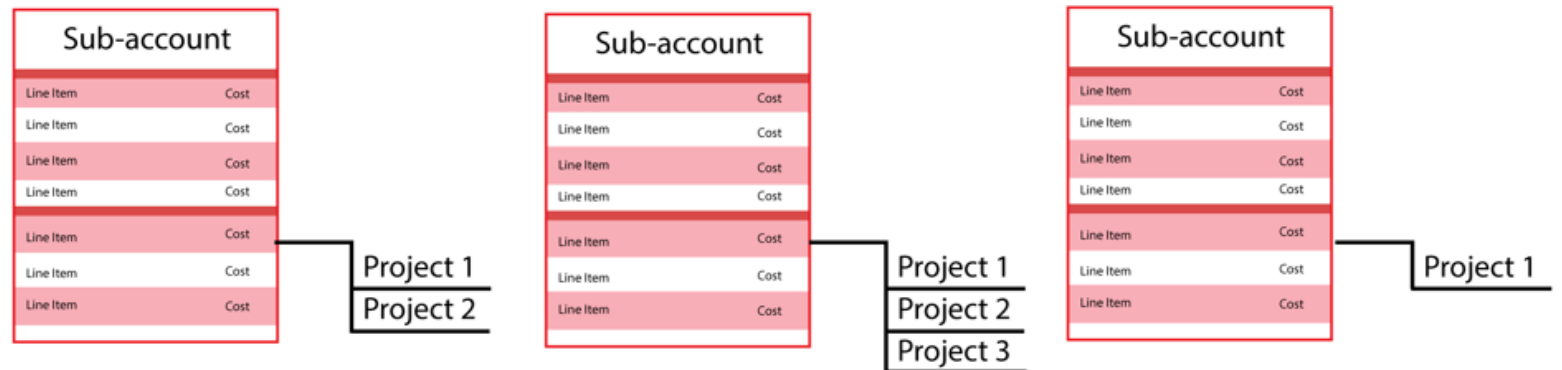
- Contractors – builders, plumbers, electricians, painters, et cetera – constantly move from job to job and buy supplies for each of their projects.
- It's vital for B2B suppliers like hardware stores and lumberyards to accurately manage their accounts receivable from these customers and their projects.
- Paladin's **Sub-accounts** feature helps suppliers more accurately manage business accounts by assigning **Sub-accounts** to a business customer's **Parent account**.

Hierarchy of Parent Accounts, Sub-Accounts & Projects

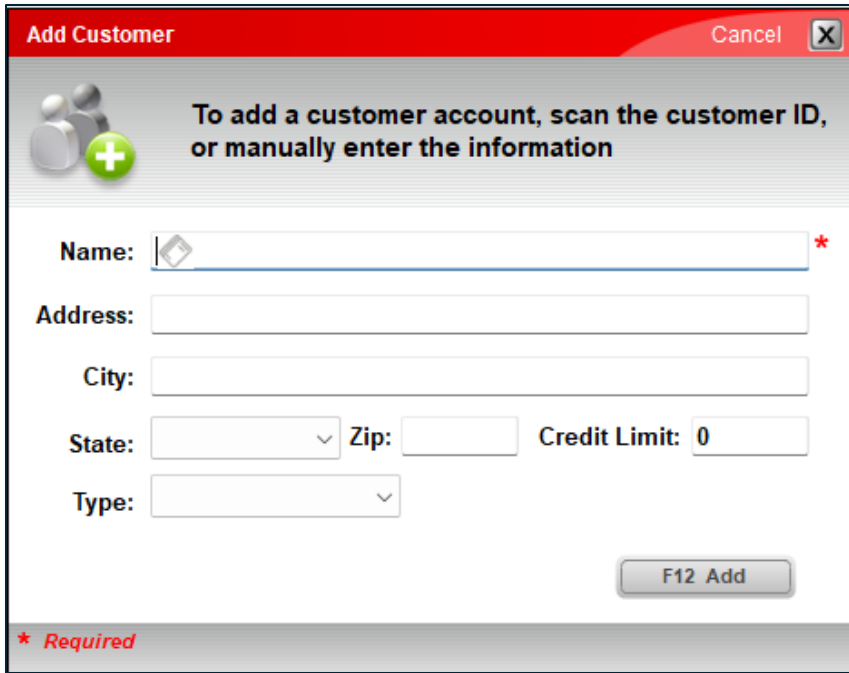
Parent account
& parent account projects



Sub-accounts
& sub account projects



Create a customer account



Add Customer Cancel X

To add a customer account, scan the customer ID, or manually enter the information

Name: *

Address:

City:

State: Zip: Credit Limit: 0

Type:

F12 Add

* Required

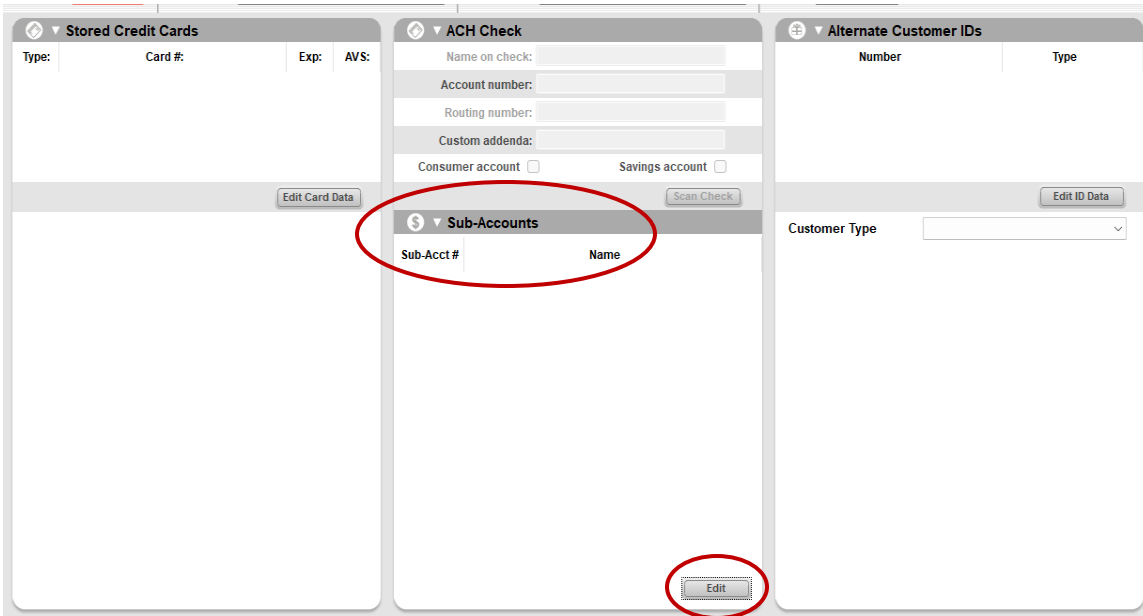
1. In Paladin, on the top ribbon, select the **Customer** module.
2. On the bottom ribbon of the module, click **F2 Add Customer**.
3. In the **Add Customer** window, fill out all fields with appropriate information.

Note: If the Credit Limit is not established and left at 0 (zero), the customer account you are creating will NOT be able to charge anything to the account.

4. Click **F12 Add**.
5. On the bottom ribbon of the module, select **F8 Tax**.
6. In the **Tax Window**, select all tax applicable to the customer.
7. Click **F12 Finish**.



Setting up Parent/Sub-accounts



The screenshot displays three main panels in a software interface:

- Stored Credit Cards:** Includes fields for Type, Card #, Exp, and AVS, with an "Edit Card Data" button.
- ACH Check:** Includes fields for Name on check, Account number, Routing number, and Custom addenda. It also has checkboxes for "Consumer account" and "Savings account", and a "Scan Check" button.
- Alternate Customer IDs:** Includes a "Number" field and a "Type" dropdown menu, with an "Edit ID Data" button.

The **Sub-Accounts** pane is active and contains a table with the following structure:

Sub-Acct #	Name
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An "Edit" button is located at the bottom right of the Sub-Accounts pane.

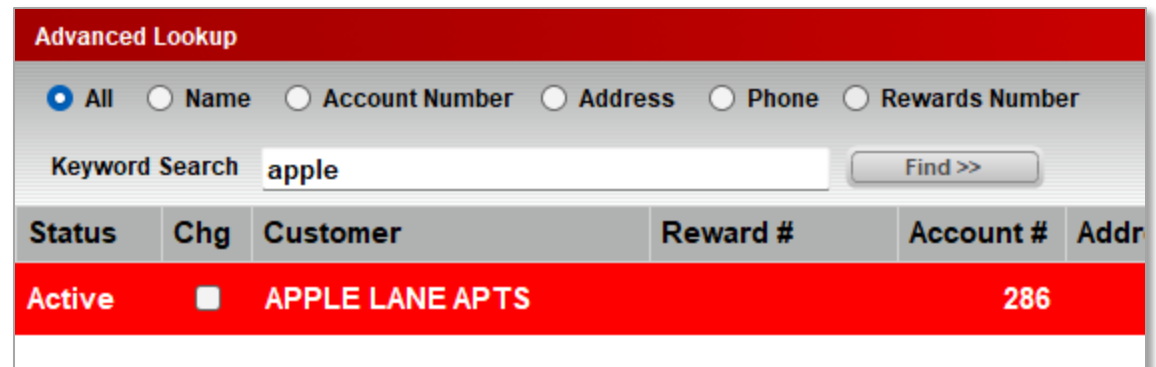
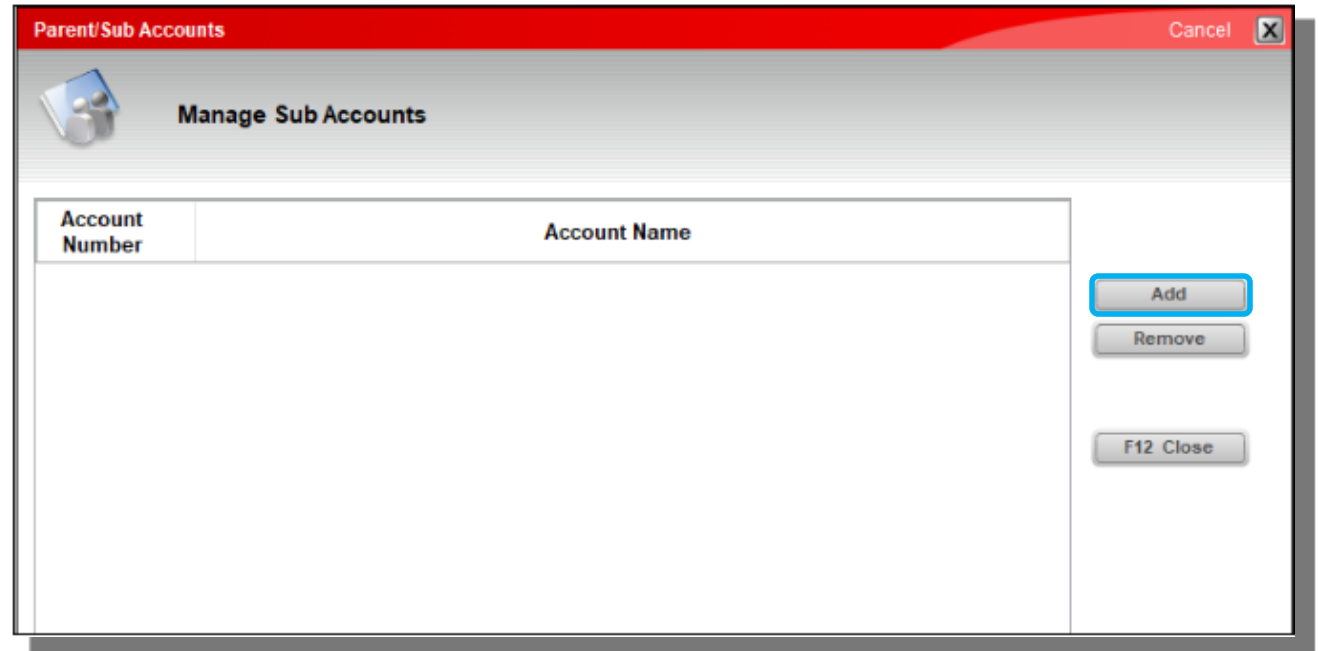
To set **Parent/Sub-accounts**:

1. Create a new account for each **Sub-account**.
2. In Paladin, on the top ribbon, select the **Customers** module.
3. Select the account you want to designate as the parent account from the **Customer** list and press **Enter**.
4. Select the **Electronic** tab.
5. In the **Sub-accounts** pane, press **Edit**.

Setting up Parent/Sub-accounts (cont'd.)

The **Parent/Sub-accounts** window opens.

6. In the **Parent/Sub-accounts** window, press **Add**.
7. The **Advanced Lookup** window opens
8. Enter an account name in the **Keyword Search** box and press **Find >>**.
9. Highlight an account and press **F8 Select Customer**.

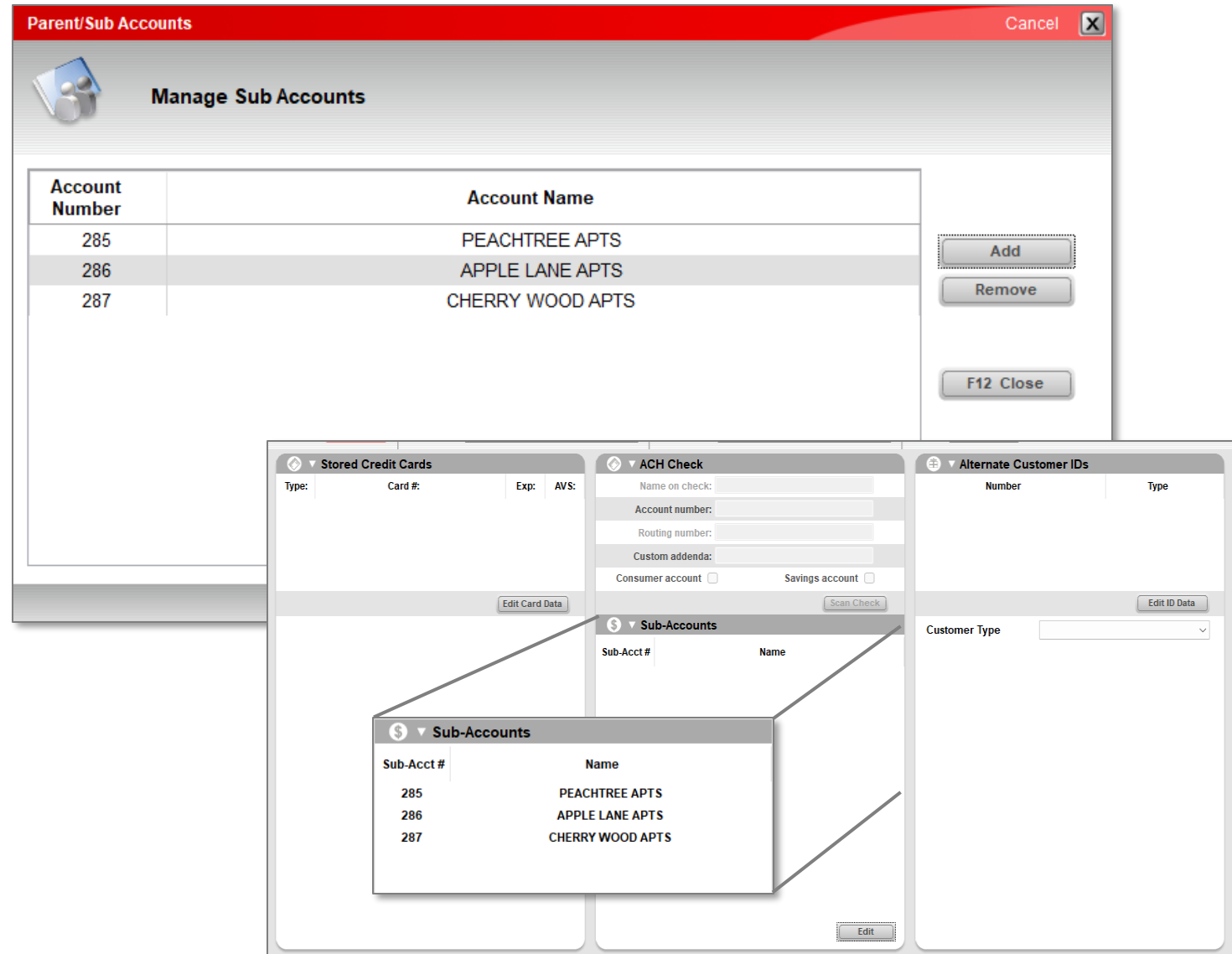


Managing Parent/Sub-accounts

The **Parent/Sub-Accounts** window opens showing the account selected.

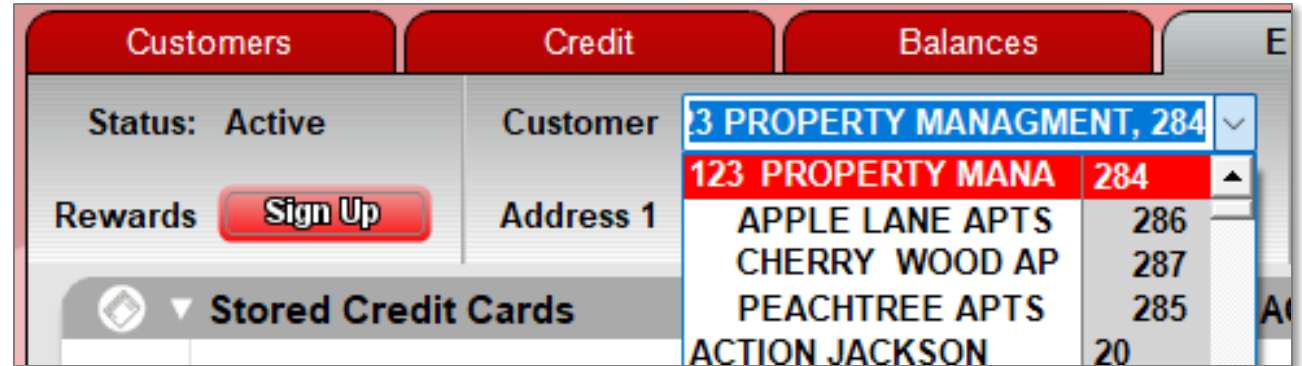
Repeat steps 6 through 8 to select additional accounts.

- When done adding accounts, in the **Parent/Sub-accounts** window press F12 Close.
- The **Sub-accounts** pane now shows all sub-accounts created.



Managing Parent/Sub-accounts (cont'd.)

Now, when a customer is selected from the **Customer** list in the **Customers** or **Invoice/Quote** modules, the **Sub-accounts** are shown indented below the **Parent account**.



Customers	Credit	Balances
Status: Active	Customer	3 PROPERTY MANAGMENT, 284
Rewards Sign Up	Address 1	123 PROPERTY MANA 284
		APPLE LANE APTS 286
		CHERRY WOOD AP 287
		PEACHTREE APTS 285
		ACTION JACKSON 20
	Stored Credit Cards	



Learn More

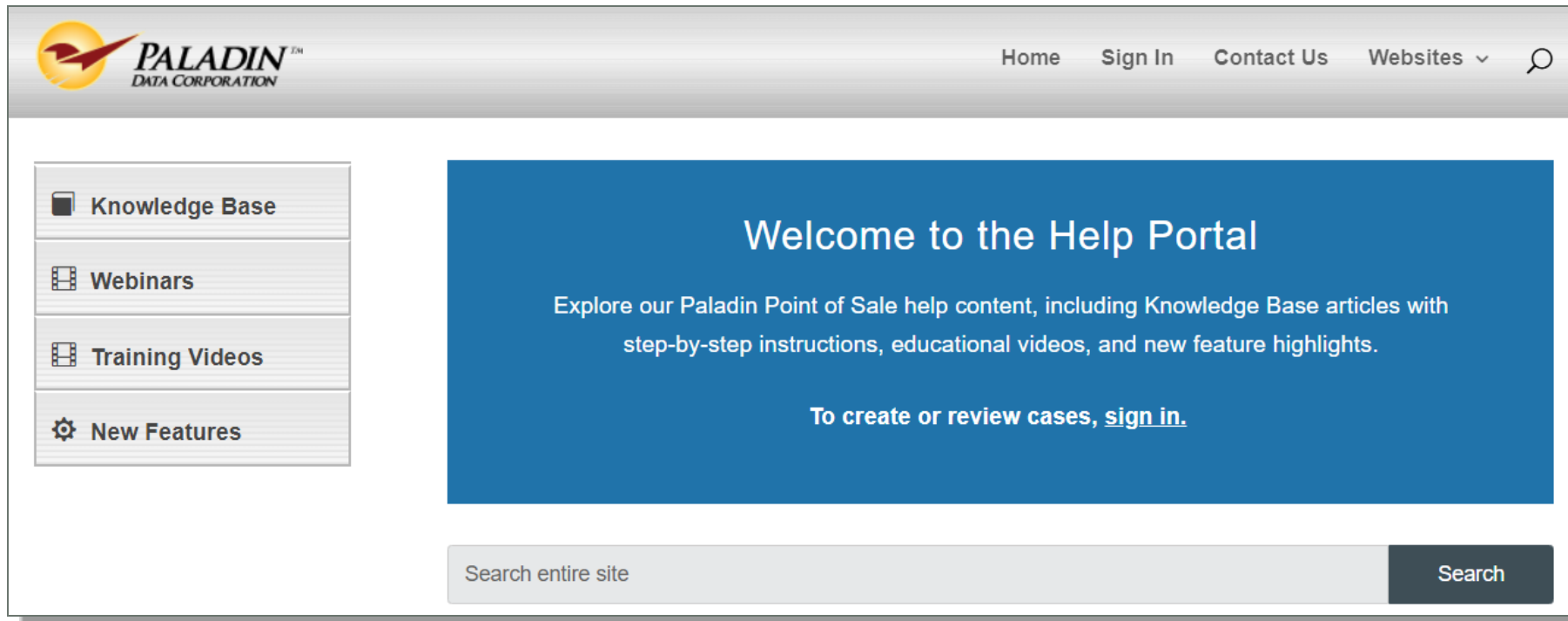
- Parent/Child accounts
- Customer accounts

A recording of this webinar will be available at portal.paladinpos.com/webinars.

Where to find more information


<http://portal.paladinpos.com>


- Detailed written instructions are available on the Paladin knowledge base.
 - Knowledge Base Article (KBA) instructions
 - Webinar presentations





The screenshot shows the Paladin Data Corporation Help Portal. The header includes the company logo and navigation links: Home, Sign In, Contact Us, and Websites. A search icon is also present. The main content area features a blue banner with the text "Welcome to the Help Portal" and a description of the help content. Below the banner is a search bar with the text "Search entire site" and a "Search" button. On the left side, there is a sidebar with four menu items: Knowledge Base, Webinars, Training Videos, and New Features.


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DATA CORPORATION

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Welcome to the Help Portal

Explore our Paladin Point of Sale help content, including Knowledge Base articles with step-by-step instructions, educational videos, and new feature highlights.

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