

Parent and Child Accounts

A company could have more than one location/branch/office/warehouse. In that case, you can associate accounts together to have parent-child relationship.

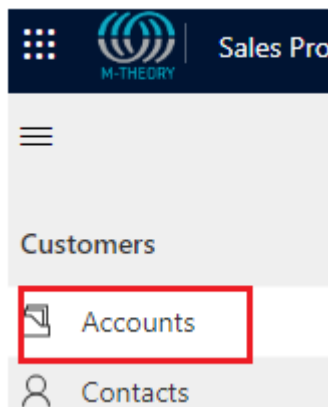
Note: Companies must already exist in the **Accounts** table. If they are not in the **Accounts** table, you must create them first using the **Create a New Account** resource.

1. Open a web browser such as Google Chrome, Firefox, or Edge.
2. Copy one of these URLs and paste it in the browser's address bar.
<https://mtheory.crm.dynamics.com/main.aspx?appid=79288b8c-2bdf-ea11-a820-000d3a300ec6>
<https://mtheory.crm.dynamics.com>

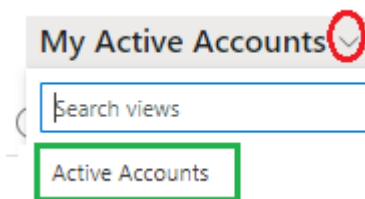
Dynamics Sales Professional app opens in the browser. You should see this title bar.



3. In the **Site Map** on the left side of the app in browser, click the **Accounts** tab.



4. In the right pane, click the down arrow next to the **My Active Accounts** view name. Then, select the **Active Account** view from the list.



Selecting a parent account for a child account

1. Open the record of the account that you want to designate as child account.
2. In the **ACCOUNTN INFORMATION** section, go to the **Parent Account** field.
Perform one of these 2 actions:
 - a. Either type the account name or account number of the parent company in the **Look for the Parent Account** box.

ACCOUNT INFORMATION

Account Name *

Parent Account

Look for Parent Account

- b. Or click the [search icon](#) at the right end of the box to get a list of accounts.

Parent Account

Look for Parent Account



Accounts

Recent

- Casino M8trix
- Caspian IT Group
(408) 780-0900
- Castle Property Solutions, LLC

- c. Select an account from the list.
- d. Click **Save** (to keep the main form open) or **Save & Close** (to close the main form) button in the menu bar.

Adding a child account to a parent account

1. Open the record of the account that you want to designate as a parent account.
2. Click **COMPANY PROFILE** tab.

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Account · Sales Professional ▾

Summary **COMPANY PROFILE** Opportuni

3. In the **Child Accounts** section click the 3 vertical dots icon located at the right end (1). Then, click the **Add Existing Account** (2).

CHILD ACCOUNTS

+ New Account

Account Name ↑ ▾	Account ... ▾	Main Pho...
The Oncology Institute Alhambra	TOIALHMR	626-899-...
The Oncology Institute Anaheim	TOIANHM	562-735-...

1.

2. **Add Existing Account**

Refresh Add Existing Account

Quick Cam Add a Account that already exists to the record you are working with.

A form opens on the right side of the main form.

4. Perform one of these 2 actions:

- a. Either type the account name or account number of the parent company in the **Look for records** box.

Lookup Records

Select record

Look for records

- b. Or click the **search icon** at the right end of the box to get a list of accounts.

Select record

Look for records 

Recent records [All records](#)

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 The Oncology Institute DTLA

5. Select an account from the list.

6. Click the **Add** button at the bottom of the form.

Add

Cancel

7. Click **Save** (to keep the main form open) or **Save & Close** (to close the main form) button in the menu bar.

 Save  Save & Close + Ne