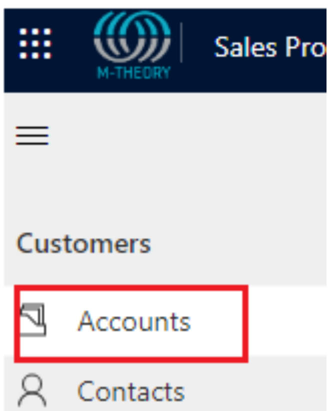
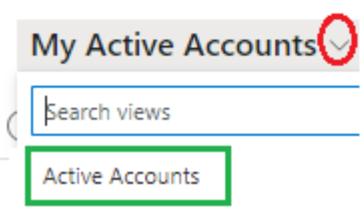
Parent and Child Accounts

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.
   

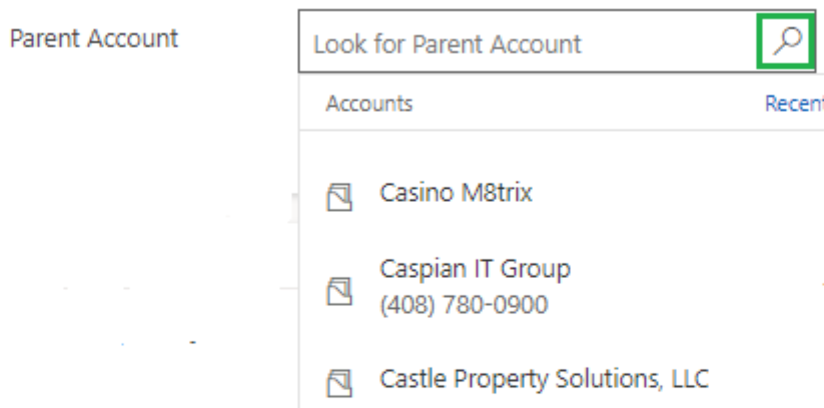
3. In the **Site Map** on the left side of the app in browser, click the **Accounts** tab.
   

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 **ACCOUTN 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.

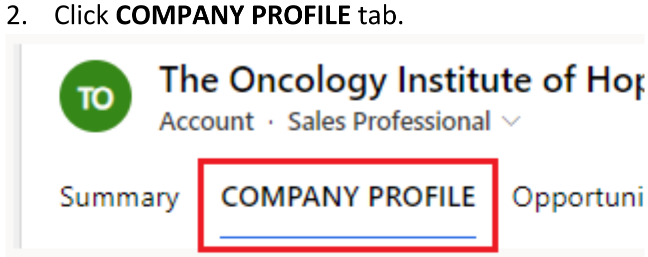
b. Or click the search icon at the right end of the box to get a list of accounts.



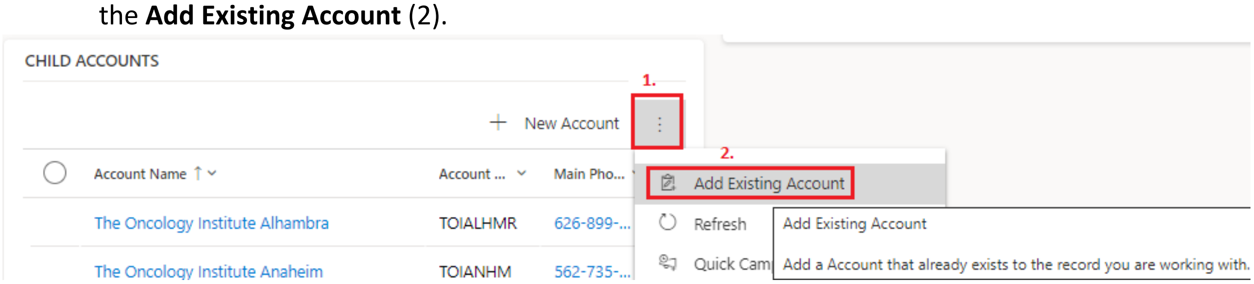
c. Select an account from the list.
d. Click **Save** (to keep the main form open) or **Save & Close** (to close the main form) button in the menu bar.

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.



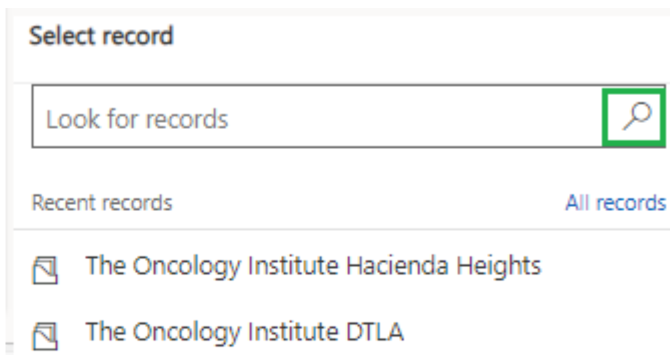
3. In the **Child Accounts** section click the 3 vertical dots icon located at the right end (1). Then, click the **Add Existing Account** (2).



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.

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



5. Select an account from the list.
6. Click the **Add** button at the bottom of the form.

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