

Beyond - How to Change a Parent Customer

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Overview

If you would like to change the organization of departments within a customer hierarchy, you can now change the parent customer within Beyond.

Setting Up Permissions

Note Users will need the "Can change parent customer" permission added to the intended Security Groups in order to access this functionality.

Permissions (1 Visible, 58 Not Visible)

49 Selected

change

Can change parent customer
Allows users to change customer/department/sub-department's parent customer

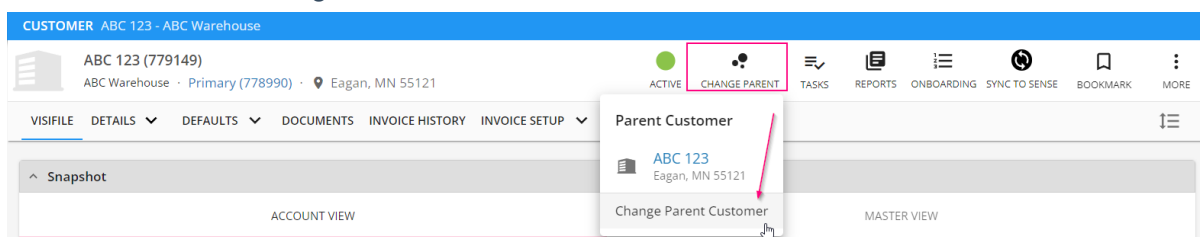
For more information on Security Groups, please see the article titled [Beyond - Managing Security Groups](#).

How to Change the Parent Customer

Navigate to the department record that you would like to change the parent record of:

Navigate to one of the following options to open the "Change Parent Customer" window:

- Customer > Charms > "Change Parent" charm



- Customer > Invoice Setup > Billing Setup > "Actions" Card > "Parent Customer" field > Edit

^ Actions	
Invoice Setup	Apply all billing to parent
Parent Customer	ABC 123 - Primary 

- Customer > Details Page > "Customer Information" Card > "Parent" field > Edit


^ Customer Information 			
Id	779149	Customer Name	ABC 123
Department Name	ABC Warehouse	Parent	778990 

Within the "Change Parent Customer" window, you will be able to select the new Parent Customer record via the "Customer" dropdown menu:


Change Parent Customer


Search customers and select the one that you would like to make the parent of Customer One

Current Parent Customer

 Customer One, Primary
MN

New Parent Customer

 Customer Two, Department B
MN

 All Job Orders, Assignments and Contacts linked to this customer or department will reflect the new parent customer's name.

* Customer

Customer Two - Department B ▼

Include inactive departments

Customer Two, Primary - 4296224245
MN
Active ▲

Customer Two, Department B - 4296224248
MN
Active

CANCEL SAVE

Note You will not be able to change the Parent Customer if any of the following are true:

- There is at least one existing invoice in the child departments related to the Parent Customer record.
- The worksite address used in the Job Order belongs to another department of the Customer the Job Order is linked to.

Once the information has been confirmed, select "Save".



Note When changing the Primary Customer record, please keep in mind the following:


- Moving a customer with sub-departments will move the whole structure (all sub-departments related to the customer) to the new parent customer.
- The parent customer name of any existing active or inactive Job Orders, Assignments and Contacts will

be replaced with the name of the new parent customer after the change.

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Current Parent Customer	New Parent Customer
 Customer One, Primary MN	 Customer Two, Department B MN

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CANCEL SAVE

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