

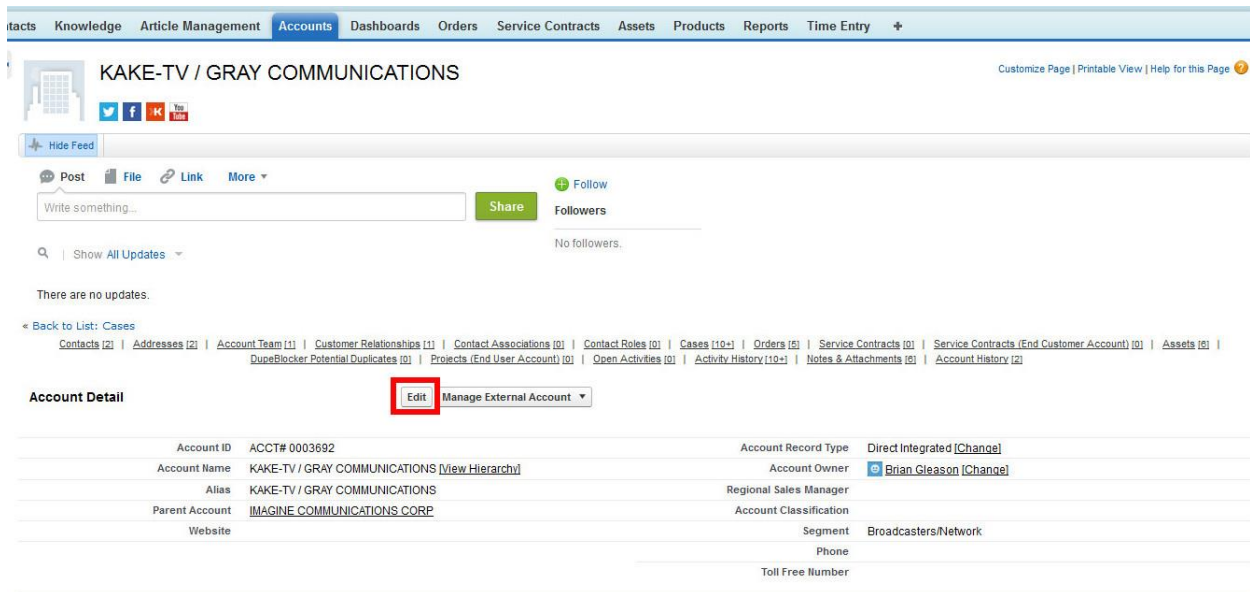
Providing Clients Access to Service Cases for the Child Account of Parent/Child Accounts in Salesforce

When accounts are set up in a parent/child relationship users associated with the parent account are able to see support cases for both the parent and child accounts if their *Profile* status is set to *Customer Manager User Parent*.

Creating a Parent/Child Relationship in Accounts

Note: This setting can only be changed by Salesforce users with the *Manage Parent Accounts* permission set. If you can't see or change the *Parent Account* pick list you likely don't have the correct permission settings. Requests for parent/child associations can be emailed to portal@imaginecommunications.com.

1. In the Accounts tab locate the record for the child account, for example *KAKE-TV / GRAY COMMUNICATIONS*.
2. Click *Edit*.



The screenshot shows the Salesforce interface for the 'Accounts' tab. The record for 'KAKE-TV / GRAY COMMUNICATIONS' is displayed. The 'Edit' button is highlighted with a red box. Below the record, the 'Account Detail' section is visible, showing various fields and their values.

Account Detail	
Account ID	ACCT# 0003692
Account Name	KAKE-TV / GRAY COMMUNICATIONS [View Hierarchy]
Alias	KAKE-TV / GRAY COMMUNICATIONS
Parent Account	IMAGINE COMMUNICATIONS CORP
Website	
Account Record Type	Direct Integrated [Change]
Account Owner	[Avatar] Brian Gleason [Change]
Regional Sales Manager	
Account Classification	
Segment	Broadcasters/Network
Phone	
Toll Free Number	




Customer Community

3. In the *Parent Account* field, click the magnifying glass and search for the name of the parent account you want to add, for example *IMAGINE COMMUNICATIONS, INC.*

Account Edit Help for this Page

KAKE-TV / GRAY COMMUNICATIONS


Account ID: ACCT# 0003692
Account Name: KAKE-TV / GRAY COMMU
Alias: KAKE-TV / GRAY COMMU
Parent Account: IMAGINE COMMUNICAT 
Website:


Account Record Type: Direct Integrated
Account Owner: Brian Gleason
Regional Sales Manager: User
Account Classification:
Segment: Broadcasters/Network
Phone:
Toll Free Number:

Address Information

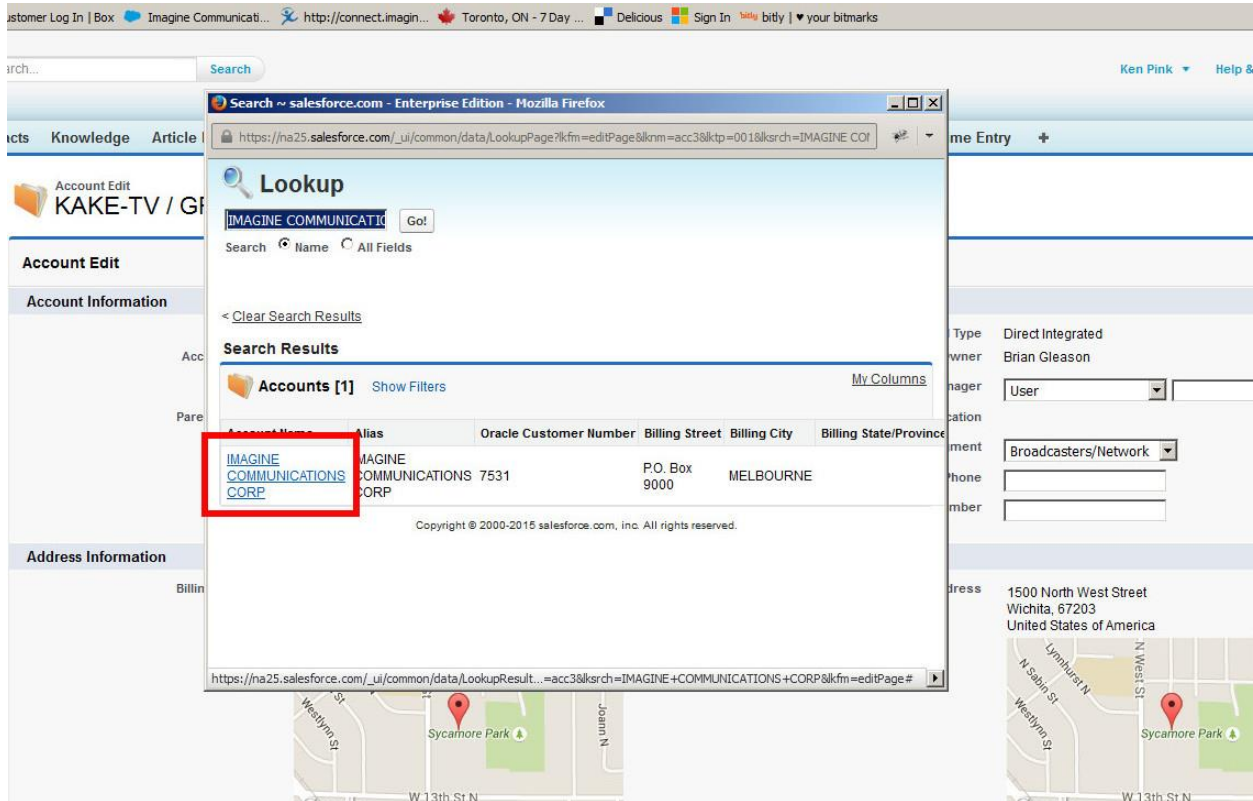
Billing Address: 1500 North West Street
Wichita, 67203
United States of America

Shipping Address: 1500 North West Street
Wichita, 67203
United States of America


Map data ©2015 Google


Map data ©2015 Google

4. From the search results click on the name of the record you want to add as the parent account.



The screenshot shows a Salesforce lookup window titled "Lookup" with the search term "IMAGINE COMMUNICATIONS CORP". The search results table shows one result:

Account Name	Alias	Oracle Customer Number	Billing Street	Billing City	Billing State/Province
IMAGINE COMMUNICATIONS CORP	IMAGINE COMMUNICATIONS CORP	7531	P.O. Box 9000	MELBOURNE	

The result is highlighted with a red box. Below the table, there is a map showing the location of the account in Melbourne, Australia.

5. Click **Save**.
6. Verify the parent/child relationship has been established by looking in the *Account Hierarchy Page* section of the *Description Information* area in the Accounts tab for either the child or the parent account.



► Address Information

Account Financial Fields

► Additional Information

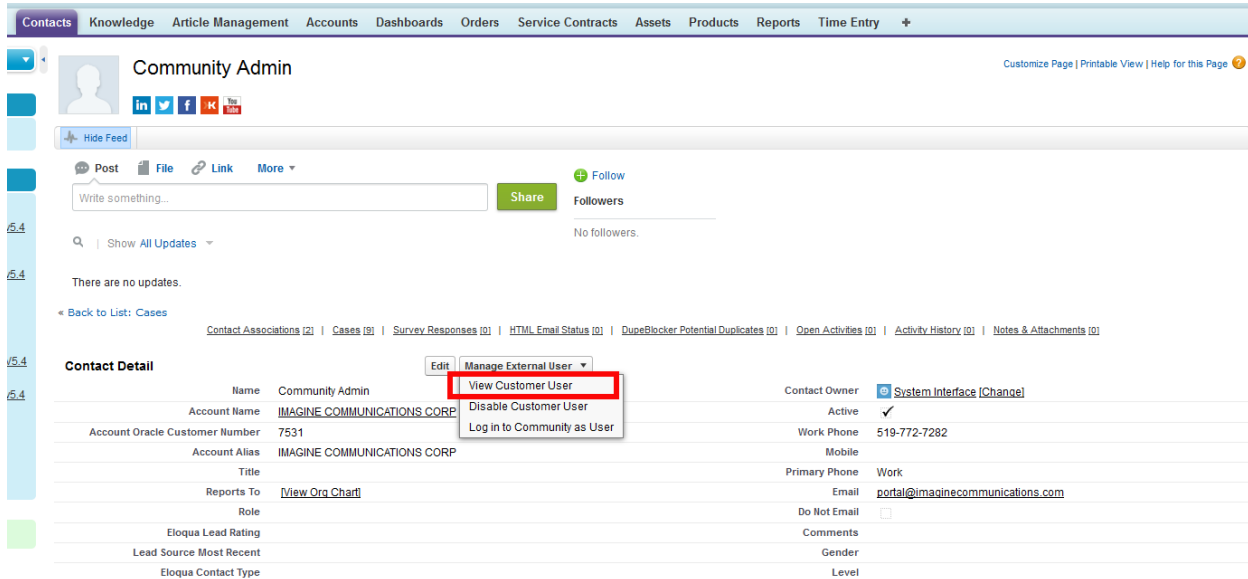
▼ Description Information

Account Hierarchy Page

B	IMAGINE COMMUNICATIONS CORP., Type= Investor, Industry= Radio Broadcasting , Billing= United States of America , Shipping= United States of America
	KAKE-TV / GRAY COMMUNICATIONS, Type= End Customer , Billing= United States of America , Shipping= United States of America

Changing the User's Record to *Customer Manager User Parent*

1. Locate the user in the Contacts tab.
2. Click on *Manage External User* and select *View Customer User*.



Community Admin

Hide Feed

Post | File | Link | More

Write something... Share Follow

No followers.

There are no updates.

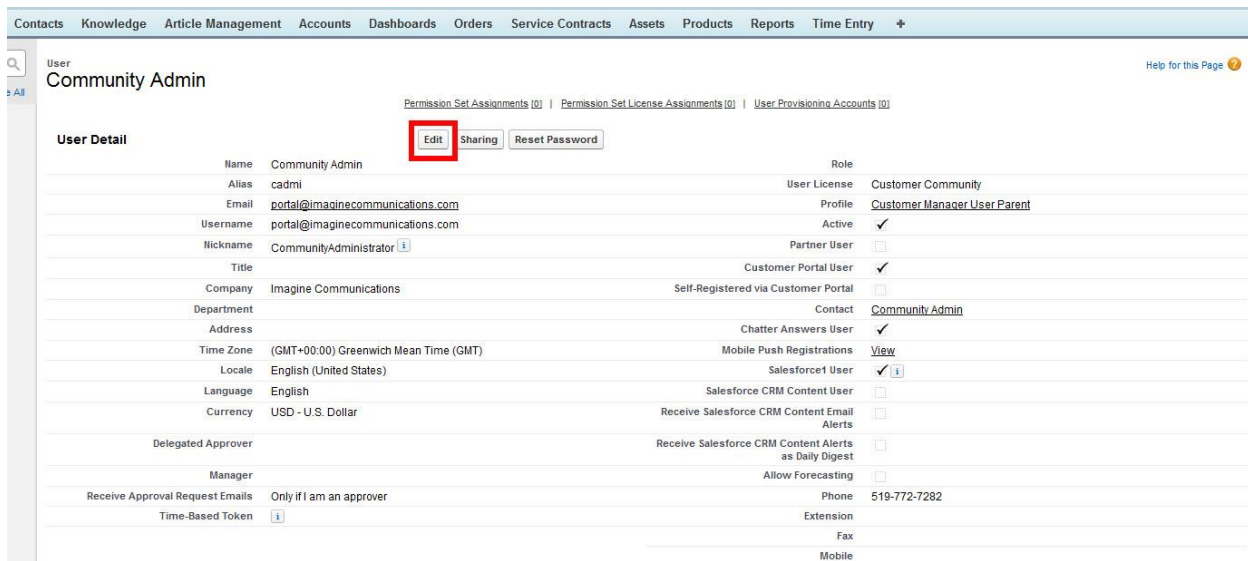
Back to List: Cases

Contact Associations (2) | Cases (3) | Survey Responses (2) | HTML Email Status (2) | DupeBlocker Potential Duplicates (2) | Open Activities (2) | Activity History (2) | Notes & Attachments (2)

Contact Detail

Name	Community Admin	Contact Owner	System Interface [Change]
Account Name	IMAGINE COMMUNICATIONS CORP	Active	✓
Account Oracle Customer Number	7531	Work Phone	519-772-7282
Account Alias	IMAGINE COMMUNICATIONS CORP	Mobile	
Title		Primary Phone	Work
Reports To	[View Org Chart]	Email	portal@imaginecommunications.com
Role		Do Not Email	<input type="checkbox"/>
Eloqua Lead Rating		Comments	
Lead Source Most Recent		Gender	
Eloqua Contact Type		Level	

3. Click *Edit*.



User

Community Admin

Permission Set Assignments (2) | Permission Set License Assignments (2) | User Provisioning Accounts (2)

User Detail

Name	Community Admin	Role	Customer Community
Alias	cadmi	User License	Customer Manager User Parent
Email	portal@imaginecommunications.com	Profile	Customer Manager User Parent
Username	portal@imaginecommunications.com	Active	✓
Nickname	CommunityAdministrator	Partner User	<input type="checkbox"/>
Title		Customer Portal User	✓
Company	Imagine Communications	Self-Registered via Customer Portal	<input type="checkbox"/>
Department		Contact	Community Admin
Address		Chatter Answers User	✓
Time Zone	(GMT+00:00) Greenwich Mean Time (GMT)	Mobile Push Registrations	View
Locale	English (United States)	Salesforce1 User	✓
Language	English	Salesforce CRM Content User	<input type="checkbox"/>
Currency	USD - U.S. Dollar	Receive Salesforce CRM Content Email Alerts	<input type="checkbox"/>
Delegated Approver		Receive Salesforce CRM Content Alerts as Daily Digest	<input type="checkbox"/>
Manager		Allow Forecasting	<input type="checkbox"/>
Receive Approval Request Emails	Only if I am an approver	Phone	519-772-7282
Time-Based Token		Extension	
		Fax	
		Mobile	



Customer Community

4. From the *Profile* pick list, select *Customer Manager User Parent*.

User Edit
Community Admin

User Edit [Save] [Cancel]

General Information

First Name	Community	Role	None
Last Name	Admin	User License	Customer Community
Alias	cadmi	Profile	Customer Manager User Parent
Email	portal@imaginecommuni	Active	Customer Community User
Username	portal@imaginecommuni	Chatter Answers User	Customer Manager User
Nickname	CommunityAdministrator	Salesforce1 User	Customer Manager User Parent
Title			Customer Self-Registration User
Company	Imagine Communications		Customer User
Department			

Salesforce CRM Content User ☐

Receive Salesforce CRM Content Email Alerts ☐

Receive Salesforce CRM Content Alerts as Daily Digest ☐

Allow Forecasting ☐

Phone 519-772-7282

Extension

Fax

Mobile

Email Encoding General US & Western Europe (ISO-8859-1, ISO-LATIN-1)

Click **Save**.

User Edit
Community Admin

User Edit [Save] [Cancel]

General Information

First Name	Community	Role	None
Last Name	Admin	User License	Customer Community
Alias	cadmi	Profile	Customer Manager User Parent
Email	portal@imaginecommuni	Active	<input checked="" type="checkbox"/>
Username	portal@imaginecommuni	Chatter Answers User	<input checked="" type="checkbox"/>
Nickname	CommunityAdministrator	Salesforce1 User	<input checked="" type="checkbox"/>
Title			
Company	Imagine Communications		
Department			

Salesforce CRM Content User ☐

Receive Salesforce CRM Content Email Alerts ☐

Receive Salesforce CRM Content Alerts as Daily Digest ☐

Allow Forecasting ☐

Phone 519-772-7282

Extension

Fax

Mobile

Email Encoding General US & Western Europe (ISO-8859-1, ISO-LATIN-1)

The client will then be able to see service cases for the parent and any child accounts.