SHRED-LOGIX

FROM propel ADVANTAGE™

CONSOLIDATION OF ACCOUNTS

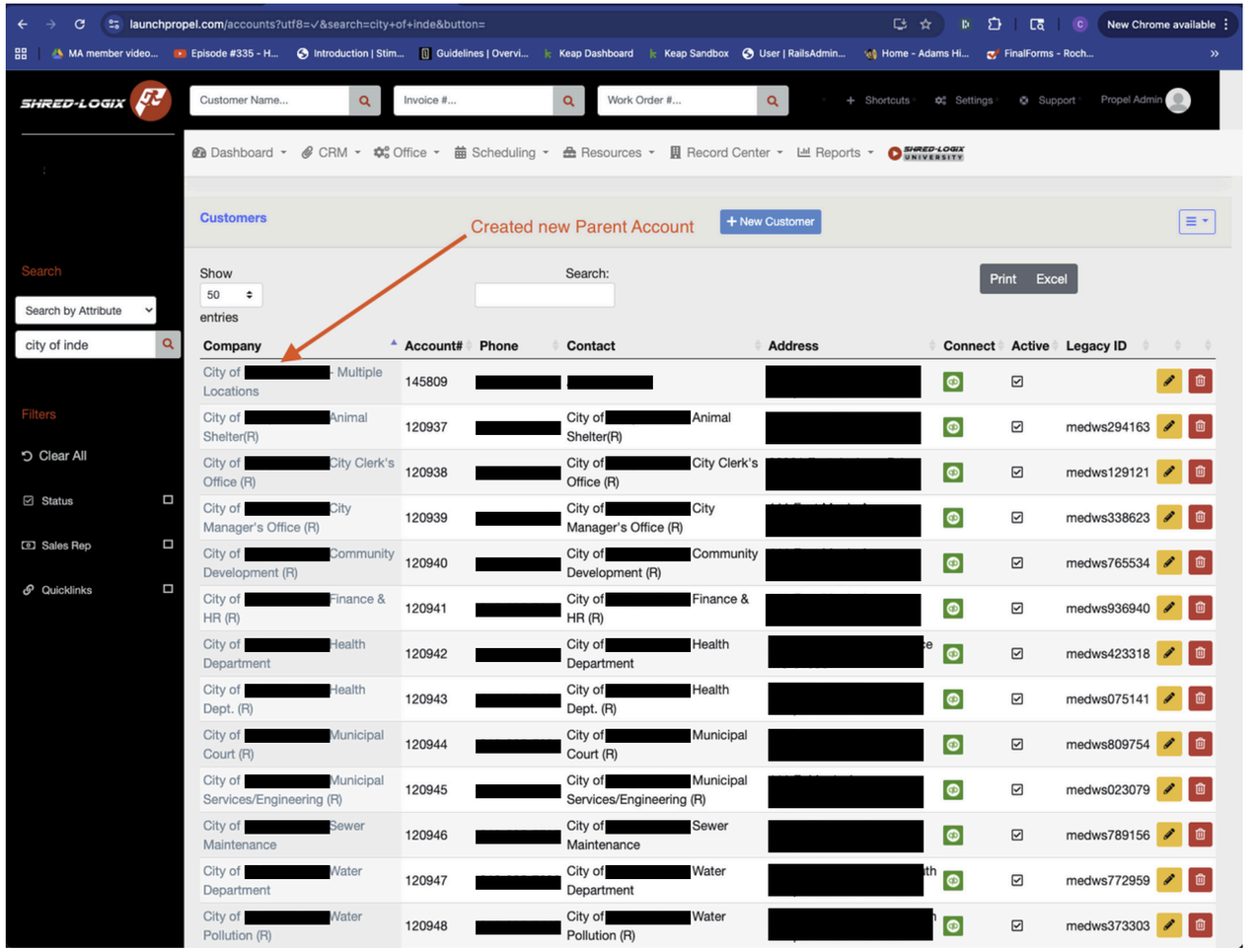
HOW TO CONSOLIDATE MULTIPLE ACCOUNTS INTO ONE “PARENT” ACCOUNT

Use this method when you want to merge multiple accounts into one account. This is commonly used when a customer would like to have one consolidated invoice sent to them for multiple locations that you service with a time period.

Follow the steps below to move any number of account locations to become a “Child” into a “Parent” account.

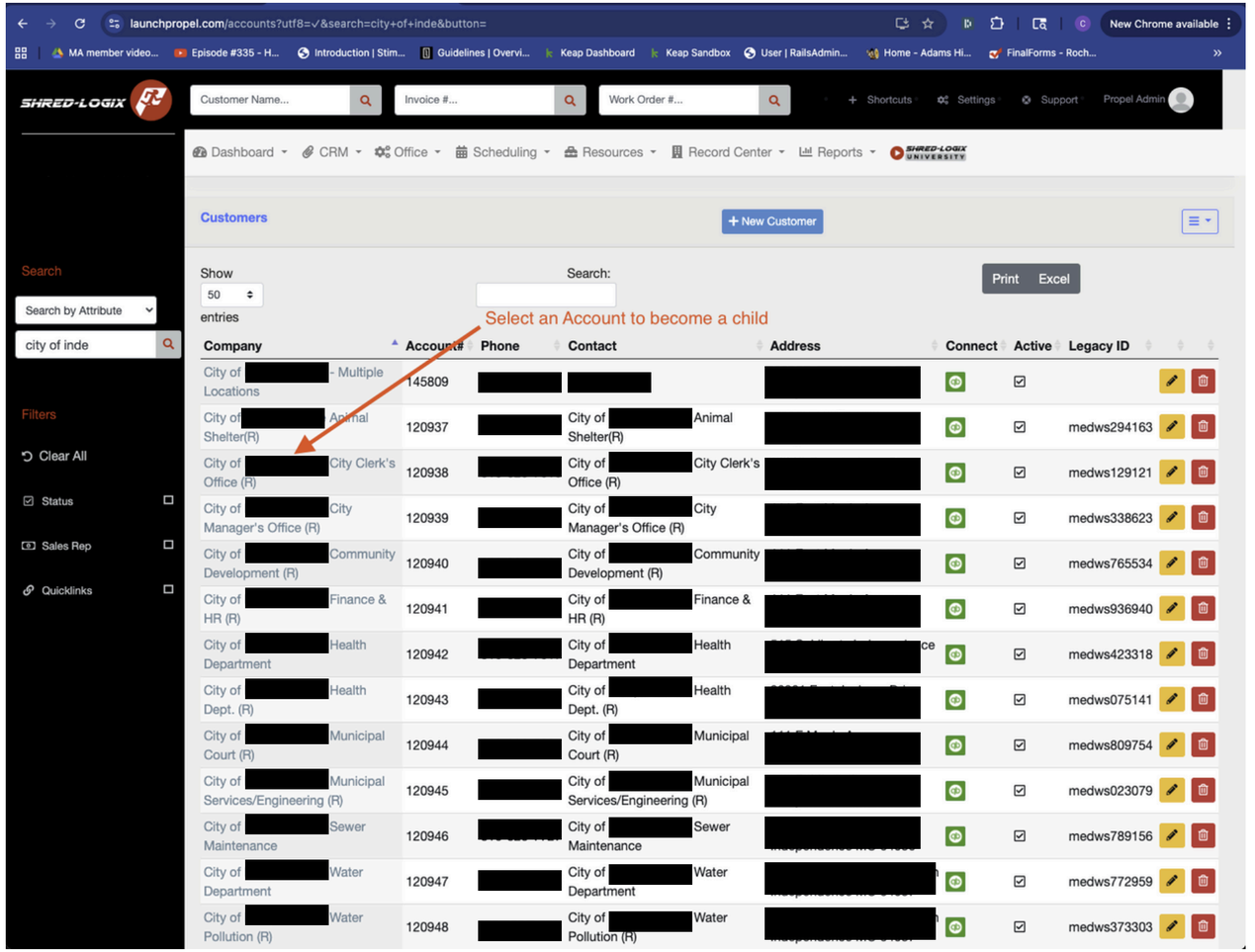
1. DETERMINE PARENT ACCOUNT

Determine which of the existing accounts will be the Parent Account or Create a New Account that will serve as the parent account.



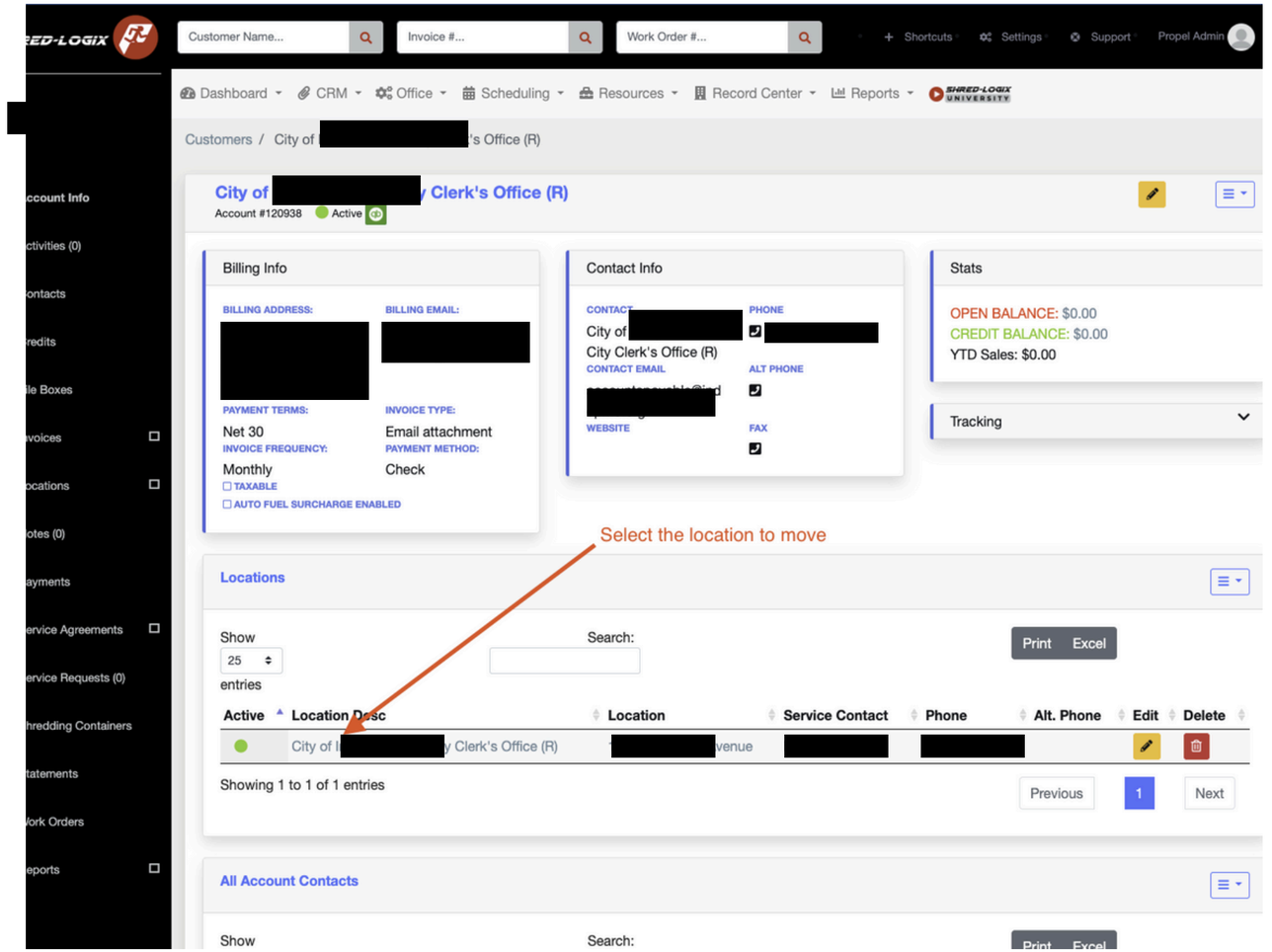
2. SELECT A CHILD ACCOUNT

Determine and select the account that will become a child account to the parent account.



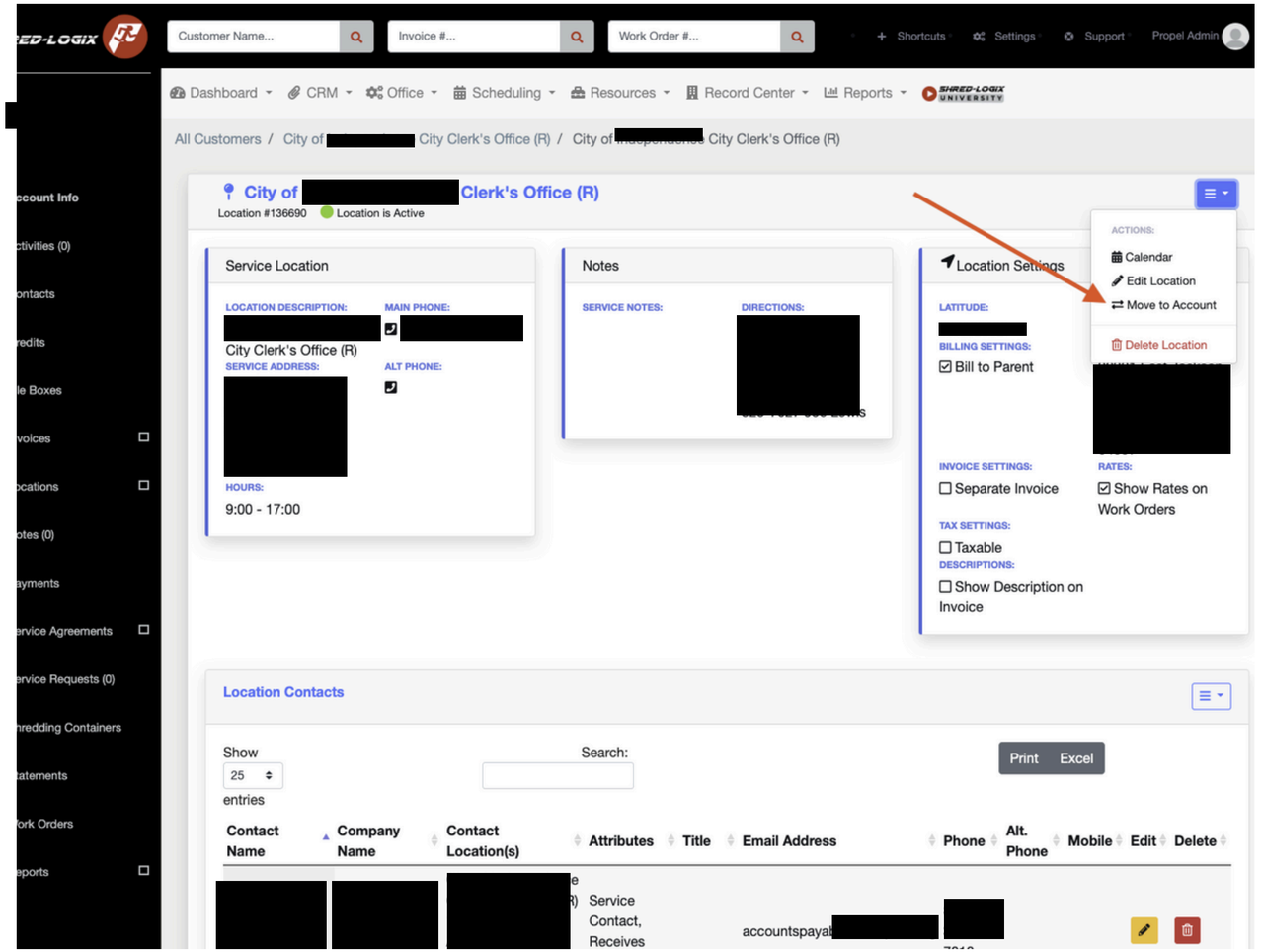
3. SELECT A LOCATION TO MOVE

Select a location of the Child account to move to the Parent Account.



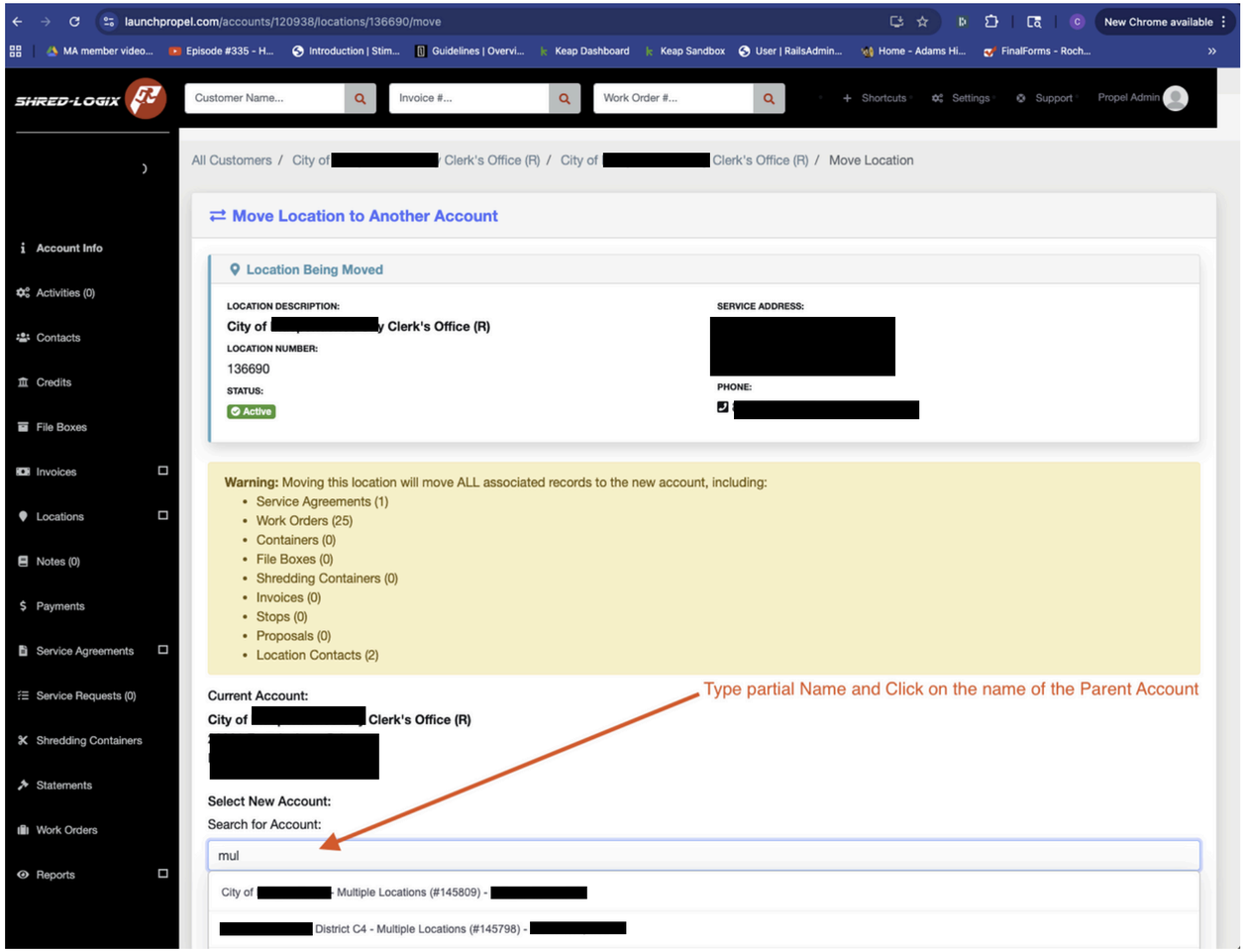
4. SELECT THE MOVE TO ACCOUNT FUNCTION

In the location page, in the dropdown menu, Select the Move to Account



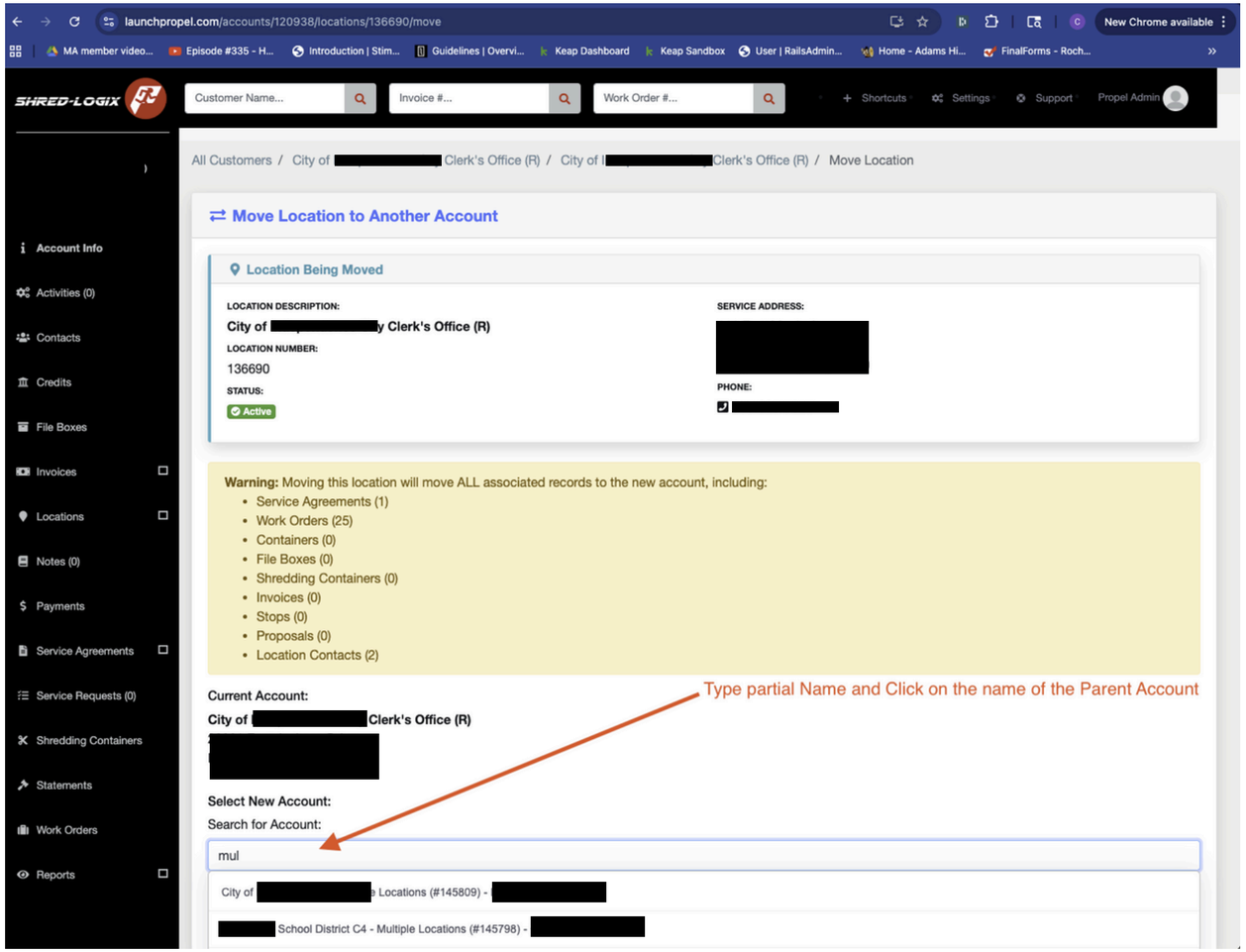
5. SET THE ACCOUNT TO MOVE THE CHILD LOCATION TOO

In the bottom field for Select New Account, type at least 2 letters to start locating the Parent Account. Note, if you're looking for an account with the words, Multiple Locations, starting typing mult It should shorten the list.



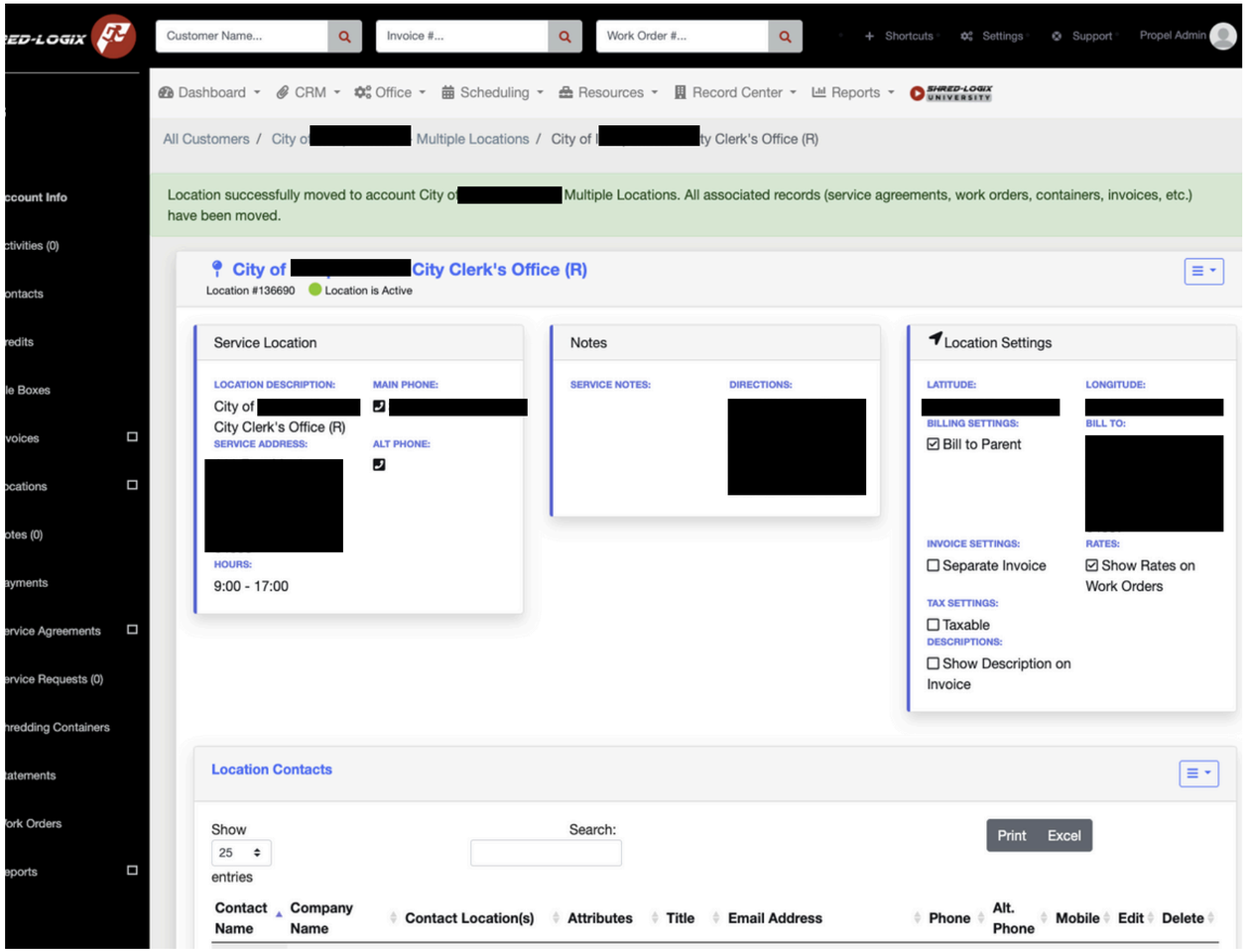
6. MOVE TO LOCATION

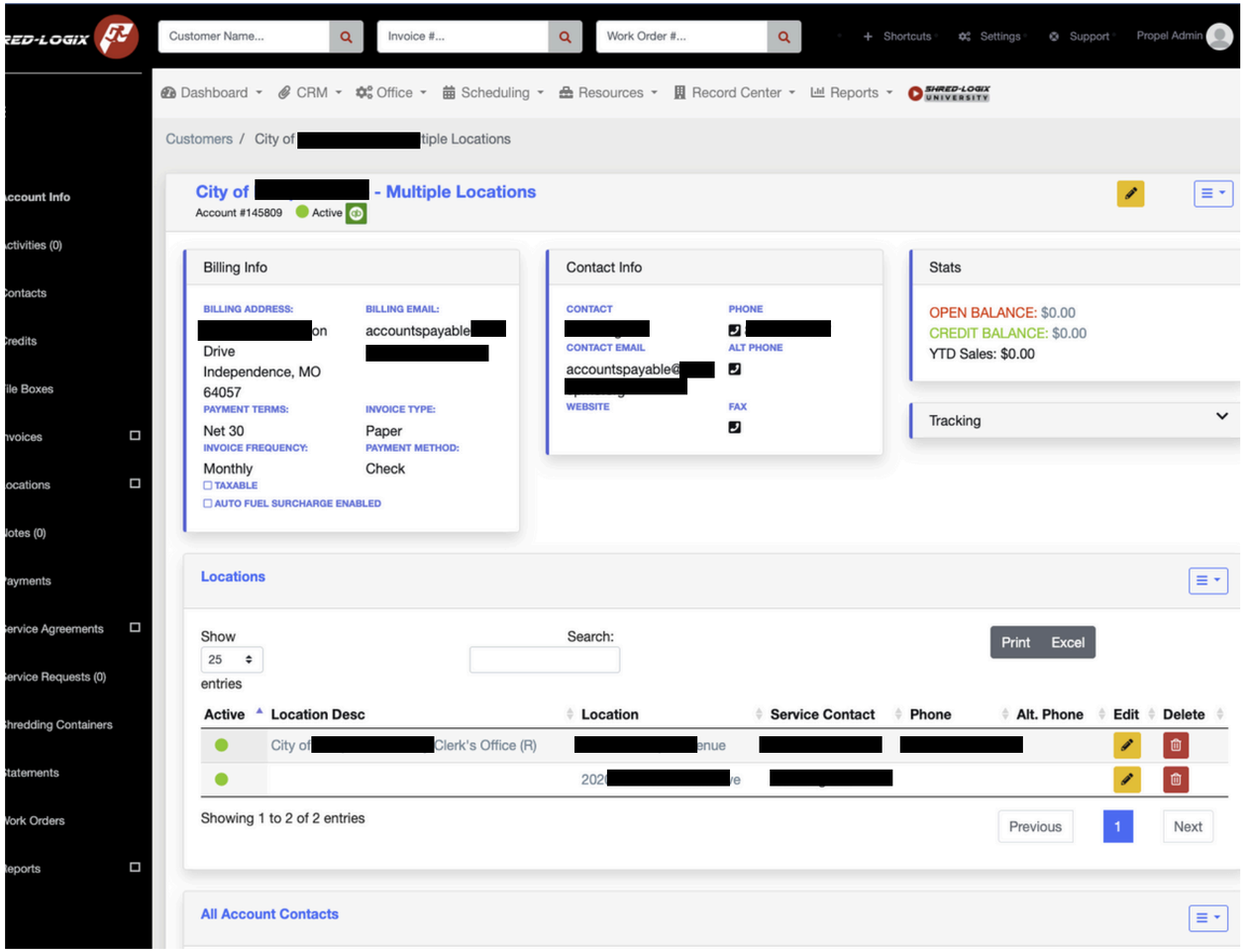
Once the parent account is selected, click on the Move Location button.



7. SHRED-LOGIX WILL CONFIRM MOVE

When the location is moved to the new parent location, Shred-logix will confirm it's been completed.



8. VIEWING PARENT ACCOUNT

Finally, you can view the parent account page and see the location was moved to that account.