



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.

The screenshot displays the SHRED-LOGIX software interface. The top navigation bar includes the SHRED-LOGIX logo, search filters for Customer Name, Invoice #, and Work Order #, and user information. The main content area shows a 'Customers' section with a '+ New Customer' button. A table lists various customer accounts, with the first entry highlighted by an orange arrow and labeled 'Created new Parent Account'. The table columns are Company, Account#, Phone, Contact, Address, Connect, Active, and Legacy ID.

Company	Account#	Phone	Contact	Address	Connect	Active	Legacy ID
City of [redacted] - Multiple Locations	145809	[redacted]	[redacted]	[redacted]	[green icon]	[checked]	
City of [redacted] Animal Shelter(R)	120937	[redacted]	City of [redacted] Animal Shelter(R)	[redacted]	[green icon]	[checked]	medws294163
City of [redacted] City Clerk's Office (R)	120938	[redacted]	City of [redacted] City Clerk's Office (R)	[redacted]	[green icon]	[checked]	medws129121
City of [redacted] City Manager's Office (R)	120939	[redacted]	City of [redacted] City Manager's Office (R)	[redacted]	[green icon]	[checked]	medws338623
City of [redacted] Community Development (R)	120940	[redacted]	City of [redacted] Community Development (R)	[redacted]	[green icon]	[checked]	medws765534
City of [redacted] Finance & HR (R)	120941	[redacted]	City of [redacted] Finance & HR (R)	[redacted]	[green icon]	[checked]	medws936940
City of [redacted] Health Department	120942	[redacted]	City of [redacted] Health Department	[redacted]	[green icon]	[checked]	medws423318
City of [redacted] Health Dept. (R)	120943	[redacted]	City of [redacted] Health Dept. (R)	[redacted]	[green icon]	[checked]	medws075141
City of [redacted] Municipal Court (R)	120944	[redacted]	City of [redacted] Municipal Court (R)	[redacted]	[green icon]	[checked]	medws809754
City of [redacted] Municipal Services/Engineering (R)	120945	[redacted]	City of [redacted] Municipal Services/Engineering (R)	[redacted]	[green icon]	[checked]	medws023079
City of [redacted] Sewer Maintenance	120946	[redacted]	City of [redacted] Sewer Maintenance	[redacted]	[green icon]	[checked]	medws789156
City of [redacted] Water Department	120947	[redacted]	City of [redacted] Water Department	[redacted]	[green icon]	[checked]	medws772959
City of [redacted] Water Pollution (R)	120948	[redacted]	City of [redacted] Water Pollution (R)	[redacted]	[green icon]	[checked]	medws373303



2. SELECT A CHILD ACCOUNT

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

The screenshot displays the SHRED-LOGIX web application interface. The top navigation bar includes the SHRED-LOGIX logo, search filters for Customer Name, Invoice #, and Work Order #, and user profile information. The main content area shows a 'Customers' section with a '+ New Customer' button and a search bar. A table lists various customer accounts with columns for Company, Account#, Phone, Contact, Address, Connect, Active, and Legacy ID. An orange arrow points to the 'City of [redacted] Animal Shelter(R)' account, which has an account number of 120937. Above this row, the text 'Select an Account to become a child' is displayed.

Company	Account#	Phone	Contact	Address	Connect	Active	Legacy ID
City of [redacted] - Multiple Locations	145809	[redacted]	[redacted]	[redacted]	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
City of [redacted] Animal Shelter(R)	120937	[redacted]	City of [redacted] Animal Shelter(R)	[redacted]	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	medws294163
City of [redacted] City Clerk's Office (R)	120938	[redacted]	City of [redacted] City Clerk's Office (R)	[redacted]	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	medws129121
City of [redacted] City Manager's Office (R)	120939	[redacted]	City of [redacted] City Manager's Office (R)	[redacted]	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	medws338623
City of [redacted] Community Development (R)	120940	[redacted]	City of [redacted] Community Development (R)	[redacted]	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	medws765534
City of [redacted] Finance & HR (R)	120941	[redacted]	City of [redacted] Finance & HR (R)	[redacted]	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	medws936940
City of [redacted] Health Department	120942	[redacted]	City of [redacted] Health Department	[redacted]	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	medws423318
City of [redacted] Health Dept. (R)	120943	[redacted]	City of [redacted] Health Dept. (R)	[redacted]	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	medws075141
City of [redacted] Municipal Court (R)	120944	[redacted]	City of [redacted] Municipal Court (R)	[redacted]	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	medws809754
City of [redacted] Municipal Services/Engineering (R)	120945	[redacted]	City of [redacted] Municipal Services/Engineering (R)	[redacted]	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	medws023079
City of [redacted] Sewer Maintenance	120946	[redacted]	City of [redacted] Sewer Maintenance	[redacted]	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	medws789156
City of [redacted] Water Department	120947	[redacted]	City of [redacted] Water Department	[redacted]	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	medws772959
City of [redacted] Water Pollution (R)	120948	[redacted]	City of [redacted] Water Pollution (R)	[redacted]	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	medws373303



3. SELECT A LOCATION TO MOVE

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

The screenshot displays the SHRED-LOGIX UNIVERSITY software interface. At the top, there are search fields for Customer Name, Invoice #, and Work Order #, along with navigation links for Shortcuts, Settings, Support, and Propel Admin. The main content area is titled 'City of [redacted] Clerk's Office (R)' and shows account details for Account #120938, which is active. The details are organized into three columns: Billing Info, Contact Info, and Stats. The Billing Info section includes fields for Billing Address, Billing Email, Payment Terms (Net 30), Invoice Frequency (Monthly), and Invoice Type (Email attachment). The Contact Info section includes fields for Contact Name, Phone, Contact Email, Alt Phone, Website, and Fax. The Stats section shows Open Balance (\$0.00), Credit Balance (\$0.00), and YTD Sales (\$0.00). Below these sections is a 'Locations' table with a search bar and 'Print' and 'Excel' buttons. The table has columns for Active, Location Desc, Location, Service Contact, Phone, Alt. Phone, Edit, and Delete. One entry is visible: 'City of [redacted] Clerk's Office (R)' with a location of '[redacted] venue'. An orange arrow points from the text 'Select the location to move' to the 'City of [redacted] Clerk's Office (R)' entry in the table. Below the table is a pagination control showing 'Showing 1 to 1 of 1 entries' and 'Previous', '1', 'Next' buttons. At the bottom, there is an 'All Account Contacts' section with a search bar and 'Print' and 'Excel' buttons.



4. SELECT THE MOVE TO ACCOUNT FUNCTION

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

The screenshot displays the 'City of [redacted] Clerk's Office (R)' location page. The interface includes a top navigation bar with search fields for Customer Name, Invoice #, and Work Order #, and a main menu with options like Dashboard, CRM, Office, Scheduling, Resources, Record Center, and Reports. The main content area is divided into several sections: 'Service Location' with fields for location description, main phone, alt phone, service address, alt phone, and hours; 'Notes' with service notes and directions; 'Location Settings' with latitude, billing settings (including 'Bill to Parent'), invoice settings (including 'Separate Invoice'), tax settings (including 'Taxable'), and descriptions (including 'Show Description on Invoice'); and 'Location Contacts' with a search bar and a table of contacts. A dropdown menu is open over the 'Location Settings' section, showing options: 'Calendar', 'Edit Location', 'Move to Account' (highlighted with an orange arrow), and 'Delete Location'. The 'Location Contacts' table has columns for Contact Name, Company Name, Contact Location(s), Attributes, Title, Email Address, Phone, Alt. Phone, Mobile, Edit, and Delete.



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.

The screenshot displays the 'SHRED-LOGIX' web application interface. The top navigation bar includes search fields for 'Customer Name...', 'Invoice #...', and 'Work Order #...'. The main content area is titled 'Move Location to Another Account' and shows details for a location being moved, including 'LOCATION DESCRIPTION: City of [redacted] Clerk's Office (R)', 'LOCATION NUMBER: 136690', and 'STATUS: Active'. A warning message states: 'Warning: Moving this location will move ALL associated records to the new account, including: Service Agreements (1), Work Orders (25), Containers (0), File Boxes (0), Shredding Containers (0), Invoices (0), Stops (0), Proposals (0), Location Contacts (2)'. Below the warning, the 'Current Account' is identified as 'City of [redacted] Clerk's Office (R)'. The 'Select New Account' section features a search field with the text 'mul' entered, and a list of search results including 'City of [redacted] Multiple Locations (#145809) - [redacted]' and '[redacted] District C4 - Multiple Locations (#145798) - [redacted]'. An orange arrow points to the search field with the text 'Type partial Name and Click on the name of the Parent Account'.



6. MOVE TO LOCATION

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

launchpropel.com/accounts/120938/locations/136690/move

Customer Name... Invoice #... Work Order #...

All Customers / City of [REDACTED] Clerk's Office (R) / City of [REDACTED] Clerk's Office (R) / Move Location

Move Location to Another Account

Location Being Moved

LOCATION DESCRIPTION: City of [REDACTED] Clerk's Office (R)	SERVICE ADDRESS: [REDACTED]
LOCATION NUMBER: 136690	PHONE: [REDACTED]
STATUS: Active	

Warning: Moving this location will move ALL associated records to the new account, including:

- Service Agreements (1)
- Work Orders (25)
- Containers (0)
- File Boxes (0)
- Shredding Containers (0)
- Invoices (0)
- Stops (0)
- Proposals (0)
- Location Contacts (2)

Current Account:
City of [REDACTED] Clerk's Office (R)

Select New Account:
Search for Account:

mul

City of [REDACTED] Locations (#145809) - [REDACTED]

[REDACTED] School District C4 - Multiple Locations (#145798) - [REDACTED]

Type partial Name and Click on the name of the Parent Account



7. SHRED-LOGIX WILL CONFIRM MOVE

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

The screenshot displays the Shred-Logix web interface. At the top, there are search bars for Customer Name, Invoice #, and Work Order #, along with navigation links for Shortcuts, Settings, Support, and Propel Admin. The main navigation menu includes Dashboard, CRM, Office, Scheduling, Resources, Record Center, and Reports. The breadcrumb trail shows: All Customers / City of [redacted] Multiple Locations / City of [redacted] City Clerk's Office (R). A green confirmation message states: "Location successfully moved to account City of [redacted] Multiple Locations. All associated records (service agreements, work orders, containers, invoices, etc.) have been moved." Below this, the details for "City of [redacted] City Clerk's Office (R)" (Location #136690) are shown. The "Service Location" section includes fields for Location Description, Main Phone, Service Address, Alt Phone, and Hours (9:00 - 17:00). The "Notes" section has fields for Service Notes and Directions. The "Location Settings" section includes Latitude, Longitude, Billing Settings (Bill to Parent), Invoice Settings (Separate Invoice), Tax Settings (Taxable), and Descriptions (Show Description on Invoice). At the bottom, the "Location Contacts" section features a search bar, a "Show 25 entries" dropdown, and a table with columns: Contact Name, Company Name, Contact Location(s), Attributes, Title, Email Address, Phone, Alt. Phone, Mobile, Edit, and Delete. Buttons for "Print" and "Excel" are also visible.



8. VIEWING PARENT ACCOUNT

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

The screenshot displays the PROPEL ADVANTAGE software interface for viewing a parent account. The top navigation bar includes search fields for Customer Name, Invoice #, and Work Order #, along with user profile information for Propel Admin. The main content area is titled 'City of [redacted] - Multiple Locations' and shows account details for Account #145809, which is active.

Billing Info:

- BILLING ADDRESS: [redacted] on Drive, Independence, MO 64057
- BILLING EMAIL: accountspayable@[redacted]
- PAYMENT TERMS: Net 30
- INVOICE FREQUENCY: Monthly
- INVOICE TYPE: Paper
- PAYMENT METHOD: Check
- TAXABLE:
- AUTO FUEL SURCHARGE ENABLED:

Contact Info:

- CONTACT: [redacted]
- CONTACT EMAIL: accountspayable@[redacted]
- WEBSITE: [redacted]
- PHONE: [redacted]
- ALT PHONE: [redacted]
- FAX: [redacted]

Stats:

- OPEN BALANCE: \$0.00
- CREDIT BALANCE: \$0.00
- YTD Sales: \$0.00

Locations Table:

Active	Location Desc	Location	Service Contact	Phone	Alt. Phone	Edit	Delete
<input checked="" type="checkbox"/>	City of [redacted] Clerk's Office (R)	[redacted] avenue	[redacted]	[redacted]			
<input checked="" type="checkbox"/>		202 [redacted] e	[redacted]				

Showing 1 to 2 of 2 entries

