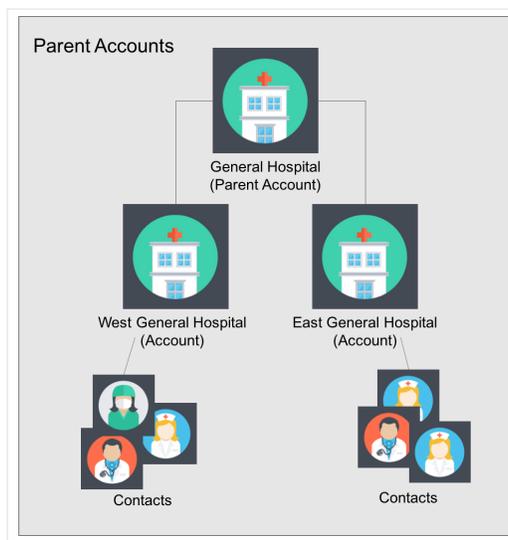


Using Parent Accounts

PlayMaker uses Accounts to represent physical facilities that marketers visit, as well as a way to group contacts by location (an overview of Accounts can be found [here](#)). There may be circumstances where grouping accounts may be helpful, using the *Parent Account* feature. This article discusses how and when users may want to use the *Parent Account* feature.



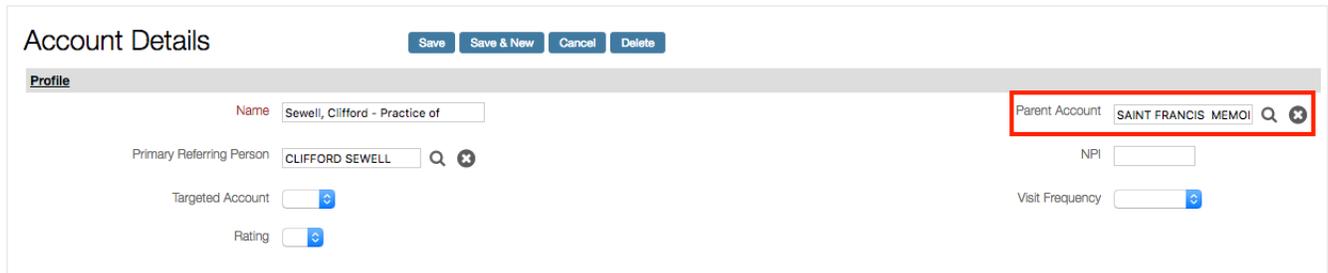
When to Use Parent Accounts

Accounts in PlayMaker can have a Parent/Child hierarchy. A parent account is an account that can view contacts, events and referrals that are related to any of its child accounts. One common use of parent accounts would be a hospital or other large facility. In many circumstances, large facilities have different floors or departments that may house a lot of contacts. Having every contact, as well as all of the visits and calls, listed under one account could become cumbersome. Breaking down the hospital into different floors or departments would allow for users to assign contacts to these smaller areas, as well as set different events, or view relevant contacts or referrals for different areas.

In addition to the above example of using child accounts to make a larger facility more manageable, there is another circumstance where parent accounts make sense to use. When a physician has their own private practice (often an *Office of* or *Practice of* account) but also sees patients at a hospital or other facility, adding the physician's office as a child account to the hospital will make the contact available for events and referrals at both facilities.

Setting Up Parent Accounts

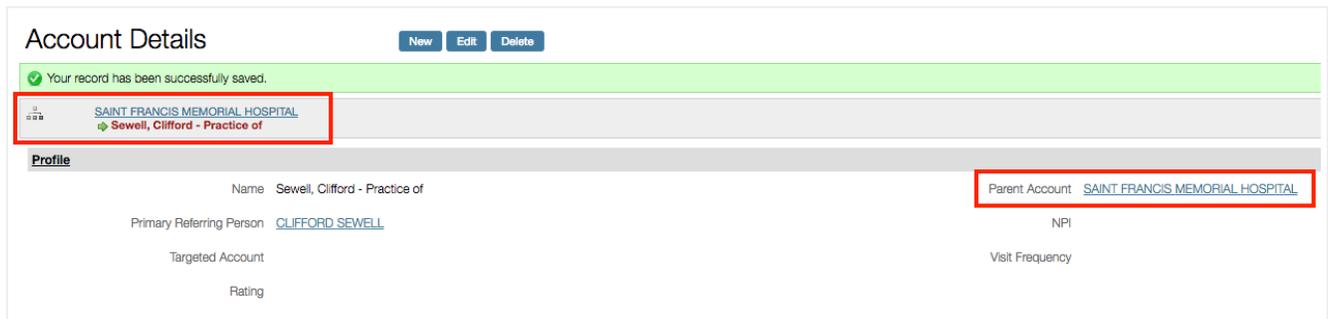
When choosing an account to use as a parent account, it is important to remember that contacts, events and referrals from child accounts will be available to the parent account, but contacts associated to the parent account will not be available to the child accounts. This means that making a private practice account the parent of a hospital account doesn't make much sense, as most of the contacts at the hospital will never be seen at the private practice.



The screenshot shows the 'Account Details' form with the following fields and values:

- Name: Sewell, Clifford - Practice of
- Primary Referring Person: CLIFFORD SEWELL
- Targeted Account: [Dropdown]
- Rating: [Dropdown]
- Parent Account: SAINT FRANCIS MEMOI (highlighted in red)
- NPI: [Input]
- Visit Frequency: [Dropdown]

Once the parent account is selected, no further action is needed on the parent account. The *Parent Account* field should remain blank on the parent account. The next step is to create or edit the accounts that will be child accounts to the parent account. In the *Parent Account* field of the *Account Details*, search for the desired parent account and select it (above). Save the record. Once the record is saved, the hierarchy will be shown above the *Account Details*, and the Parent Account field will list the appropriate account (shown below), confirming that the child account has been properly attached to the parent. Repeat these steps to associate any other child accounts to the parent account.



The screenshot shows the 'Account Details' form after saving, with a green success message at the top: 'Your record has been successfully saved.' The hierarchy is displayed as follows:

- SAINT FRANCIS MEMORIAL HOSPITAL (highlighted in red)
- ↳ Sewell, Clifford - Practice of

The 'Parent Account' field in the 'Profile' section is now populated with 'SAINT FRANCIS MEMORIAL HOSPITAL' (highlighted in red).

Parent Accounts Versus Merging Accounts

Since contacts at a child account become available at the parent account, the difference between parent accounts and merging accounts can be a little blurry. To determine which process is better for the current situation, consider the below points:

- Parent accounts should be used to organize child accounts. This allows grouping of contacts at different locations, which all roll up into a single account to view all contacts. The hospital and departments example listed above is an example of proper use of parent accounts.
- **Merging accounts** should be used when duplicate or similar records are present, and the two records should be consolidated into a single record. If an Account Executive created a Practice of account when an Office of account already exists, the two accounts can be merged, consolidating contacts, events, and referrals into the one remaining account.