



TrackerRMS

ACADEMY

How to Make Parent and Sub Companies in TrackerRMS

**Depending on the naming conventions configured in your TrackerRMS system, your "Companies" may use a different naming convention such as "Clients"*

Step 1: Using the Touchbar within the company record you wish to make a parent, select "Make a Parent Company".

Close Save Changes Delete this Company Return to Companies

Touchbar

- Print this Company
- Send a Template
- Send a Custom Form
- Send a RightSignature Form
- Upload a Document
- Create Contact
- Create Lead
- Create Job
- Create Project
- Raise a Issue
- Raise an Invoice
- Add a Note
- Add an Address
- Make a Parent Company

If you have any questions, please login to your Tracker system, go to the "Help" section in the top right corner of your screen, and raise a support ticket. Once you have submitted it, we will respond as soon as possible. Academy Clients, need a little extra help? You can request a Tracker Training Clinic, which is a 1-hour session with an Account Manager for \$75/hour at any time.

Step 2: To make a Sub Company, go into the Company record, and indicate their Parent Company under the Company Details block.

Company Details [2]

Company Name:	<input type="text" value="Unis Glover"/>	→	Parent Company:	<input type="text" value="[None]"/>
Company Type(s):	<input type="text" value="Client"/>		Company Rank:	<input type="text" value="Gold"/>
Company Vertical:	<input type="text" value="[None]"/>		Source:	<input type="text" value="Referral"/>
Company Owner:	<input type="text" value="Terry Peters"/>		Department:	<input type="text" value="[Multiple]"/>
Internal Reference:	<input type="text"/>		Territory:	<input type="text" value="United States"/>

Optional: If you wish to demote a Parent Company back to a Sub Company, use the Touchbar within the Parent Company record and select “Make a Sub Company”.

Company Rank:	<input type="text" value="Gold"/>
Source:	<input type="text" value="Website"/>
Department:	<input type="text" value="New York (Current Value)"/>
Territory:	<input type="text" value="All"/>

Touchbar

- Print this Company
- Send a Template
- Upload a Document
- Create Contact
- Create Address
- Make a Sub Company

Please Note: Parent Companies are simply umbrella companies and used for organization only. You will not have full company record functionality with Parent Companies.