Now Available: B2B Edition Account Hierarchy



Last year, we announced the closed beta for Company Account Hierarchy in B2B Edition. This feature unlocks the ability to configure parent-child relationships between different Company accounts and create user roles that allow buyers to manage their subsidiary accounts in the Buyer Portal.

We are excited to announce that starting on **March 5, 2025**, all users of B2B Edition's Buyer Portal experience can request to add this powerful tool to their stores.

Complex client organizations made simple

Buyers with complicated business structures, such as franchises and corporations, often manage multiple locations with differing levels of access. This translates into multiple Company accounts with their own Buyer Portal and purchasing needs.

With B2B Edition's Account Hierarchy, you can create up to 5 layers of parent-child relationships for the Company accounts in your client's organization. It also adds a new scope level to buyer permissions, allowing you to create custom user roles and assign them to buyers who manage multiple subsidiary branches of their business.

Each business's hierarchy is flexible, meaning that you can configure settings for each Company independently, enable or disable subsidiary access for buyers, and reorganize Companies as needed. For your clients, decision makers can freely switch between Company accounts to view aggregated data, manage purchasing for multiple locations, and pay invoices in bulk across their organization.

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Start your 15-day free trial, schedule a demo or give us a call at 1-866-581-4549.

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How do I request Account Hierarchy?

Account Hierarchy is available for B2B Edition stores have:

- The Buyer Portal experience
- Independent Companies behavior

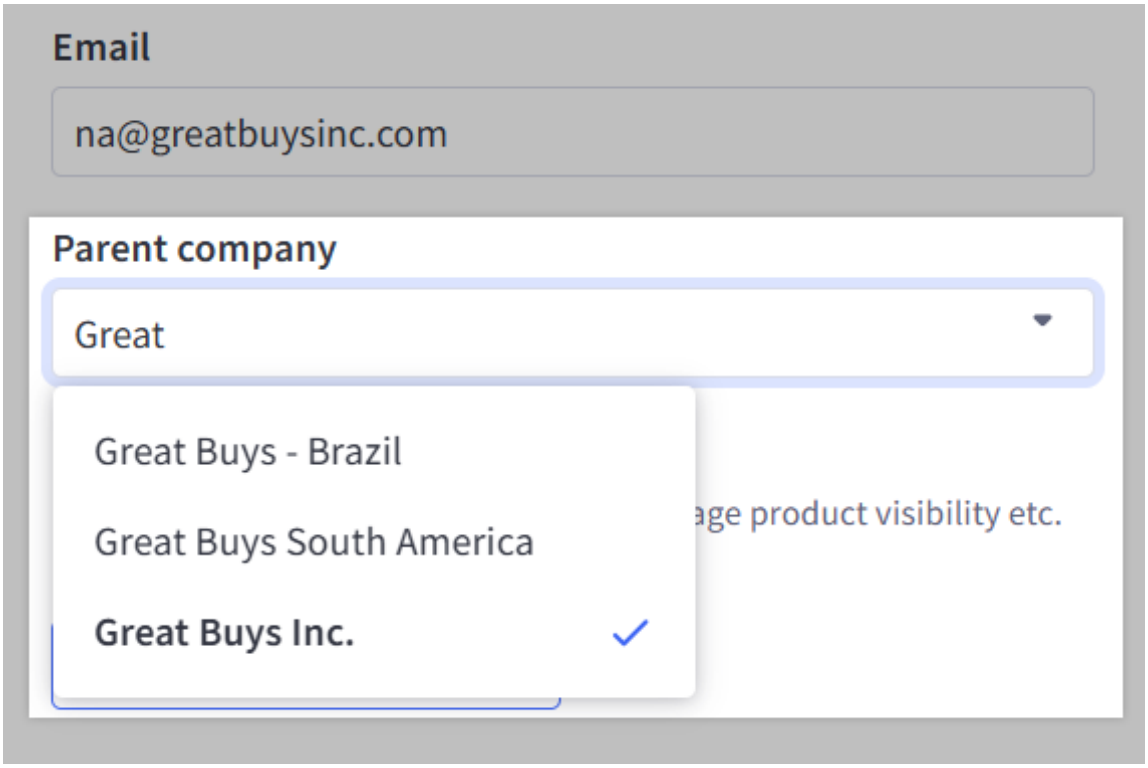
If your store meets these requirements, you can request Account Hierarchy starting on **March 5** by contacting our support team. They will relay your request, and you will be notified as soon as Account Hierarchy has been activated in your store.

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Using Account Hierarchy

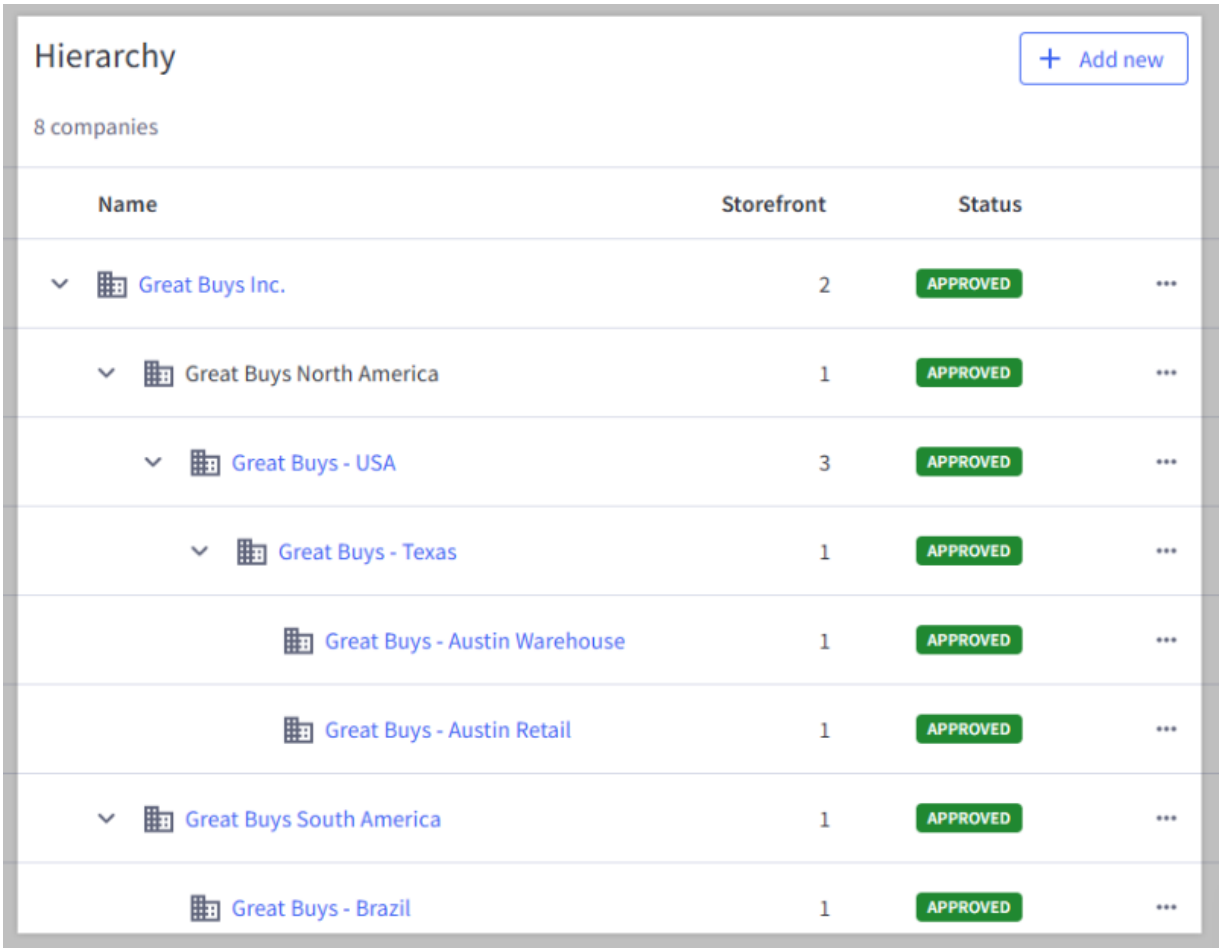
To establish Account Hierarchy for a Company account as a subsidiary, edit its details and assign a **Parent company**.



The **Hierarchy** tab displays all of a Company's parent and child accounts, and makes it easy to create, edit, and delete any account in the hierarchy.

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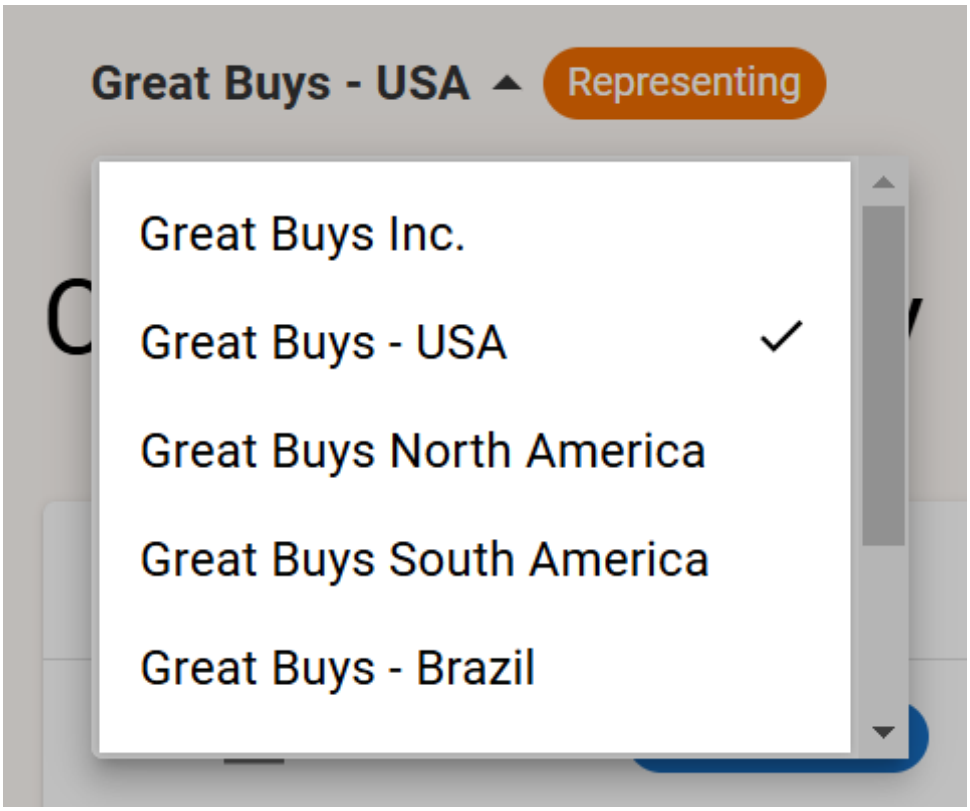
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After configuring the hierarchy and assigning user roles with Company and subsidiary access to buyers, they can select a child Company to represent. While representing another Company, they can take action on the Company's behalf in their Buyer Portal, as well as in your storefront. They can also view aggregated lists of orders, quotes, and invoices for quick and simple reporting.

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For more information on setup, buyer experience and common questions, see our article on Companies in the Help Center when the functionality becomes available in March.

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The final word

Account management for large B2B clients can be complicated, but it doesn't have to be. B2B Edition's Account Hierarchy functionality shortens admin time for your sales staff by giving buyers the flexibility they need to manage actions across their organization. Accelerate the purchasing experience for your complex clients by requesting Account Hierarchy for your store today!

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