

The Role of Account Families in CloudCheckr

Understanding how Account Families work is a critical part of making sure that you are billing customers as accurately as possible but also ensuring that you are maximizing potential profit opportunities.

WHAT ARE ACCOUNT FAMILIES (AF)?

An Account Family is a billing only construct that tells CloudCheckr which accounts belong to each customer. An AF can contain one or many accounts. An account cannot be in two Account Families simultaneously.

HOW DOES AN AF WORK?

Account Families allow you to group together multiple accounts under one larger group. In Cloudcheckr, each Account Family functions like a miniature consolidated bill, meaning that each account family is allowed to share Reserved Instances and go through the tiered pricing discounts in the same way as if they were direct with AWS. You should create one Account Family per *customer invoice* that you will generate each month.

Example: If you have 3 different customers, you will create a new Account Family for each of those customers. This means you will have 3 Account Families in your Payer account.

Before you create an account family, keep these guidelines in mind:

- You must have at least one AWS account before you can create an Account family in CloudCheckr
- You can create as many account families as you need
- You cannot add a single AWS account into multiple account families.

When accurately organized and maintained, Account Families, allows for the most accurate billing which paves the way for a good user experience.

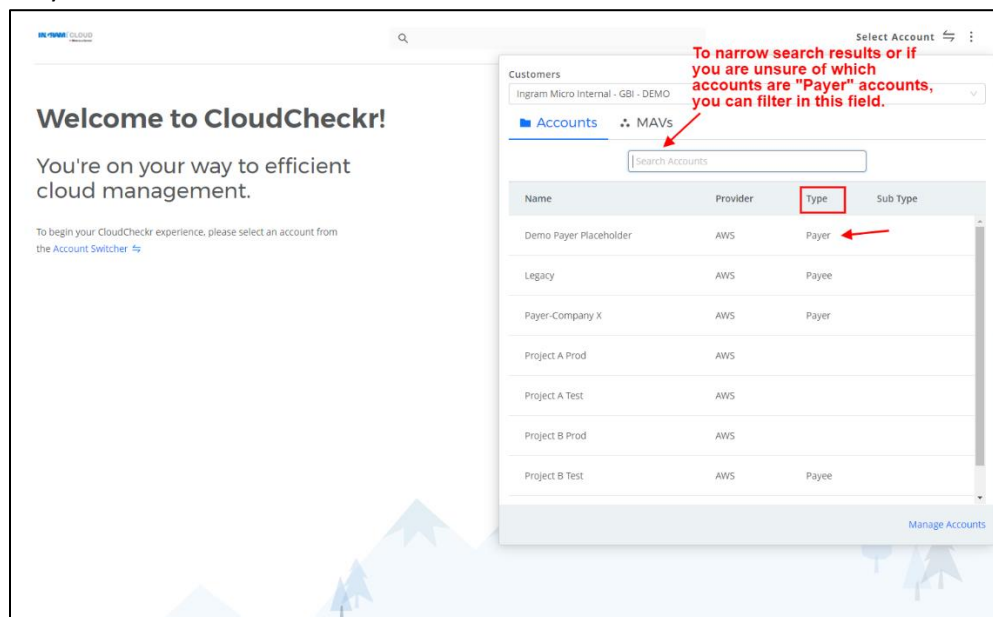
HOW CAN AFs HELP MAXIMIZE MARGIN?

At the reseller level, all accounts contained within a single Payer, go through all tiered services together and can share Reserved Instances across all reseller accounts. When accounts are broken out in account families, each AF goes through the tiers separately. In addition, CloudCheckr will remove any Reserved Instance benefit that AWS applied and convert the pricing back to On Demand pricing because the specific account or AF member did not purchase those RIs. The amount of additional margin that this creates, runs from pennies to thousands of dollars, depending on the quantity of unique customers and the amount of consumption in those accounts.

STEPS FOR VIEWING ACCOUNT FAMILIES:

Login to CloudCheckr CMX and select your account.

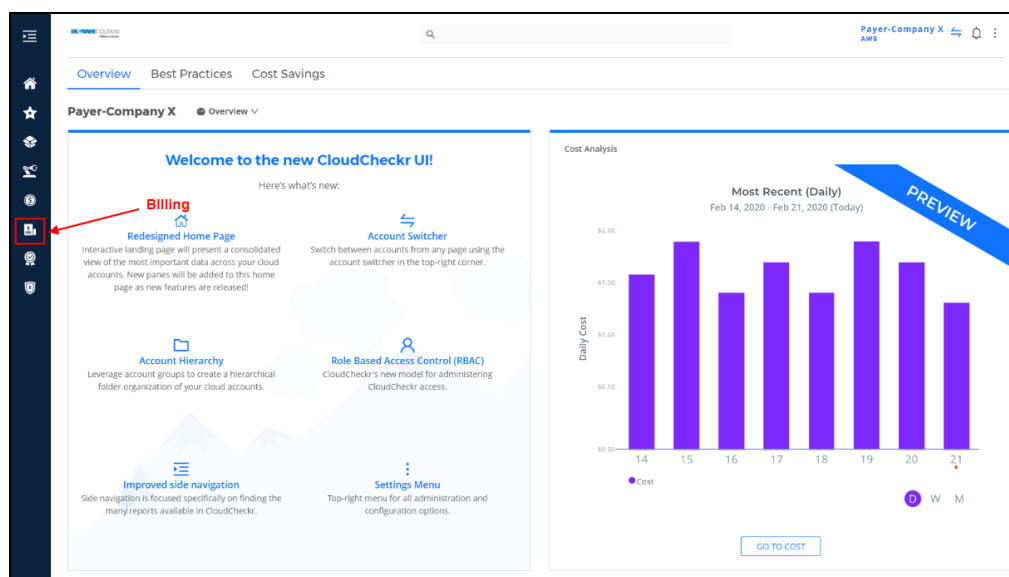
In order to manage or modify account families, you must be in a Payer Account. To make sure you are in the Payer Account, you can go to the Account Hierarchy Page, and then click on List. Then proceed to filter for "Payer."



The screenshot shows the 'Accounts' page in CloudCheckr. A modal window titled 'Customers' is open, displaying a table of accounts. The table has columns: Name, Provider, Type, and Sub Type. The 'Type' column is highlighted with a red box, and a red arrow points to the 'Payer' value in the first row. A red text box above the table states: 'To narrow search results or if you are unsure of which accounts are "Payer" accounts, you can filter in this field.' The table lists several accounts, including 'Demo Payer Placeholder', 'Legacy', 'Payer-Company X', and various 'Project A' and 'Project B' entries.

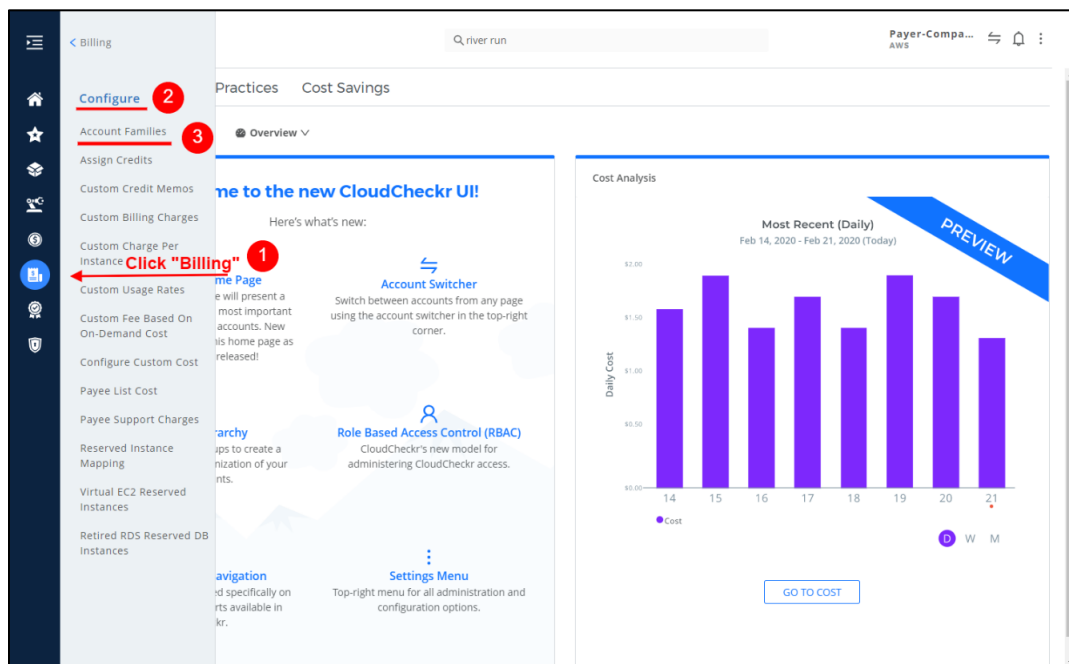
NOTE: If you have multiple Payer accounts, you will have to manage Account Families for each Payer account individually.

Another way to verify that you are in a Payer account is to look at the side bar to see if you have the Billing icon. If you were in a Payee Account or a MAV, you would not see the Billing icon.



The screenshot shows the 'Overview' page in CloudCheckr for 'Payer-Company X'. The left sidebar contains a 'Billing' icon, which is highlighted with a red box and a red arrow. The main content area displays a 'Welcome to the new CloudCheckr UI!' message and a 'Cost Analysis' chart. The chart shows 'Daily Cost' over a period from Feb 14, 2020, to Feb 21, 2020. A 'PREVIEW' banner is visible on the right side of the chart.

Navigate to: **Billing > Configure > Account Families**



You will be taken to the following screen. Here you can see:

- Total Account Families
- Total Mapped Accounts
- Accounts Not in a Family – Make sure all your accounts are in an Account Family
 - See “Steps for Creating an Account Family” below
- Account Family Name – under which you will see the list of Account Families
- Child Accounts- you can see how many accounts are with each Account Family

In the very rare case that you have a single end user customer that wants separate invoices for each of their accounts, you would create a separate Account Family for each of those accounts.

Or, if they want the pricing to reflect a single AF but reported separately, you can invoice using a saved filter.

STEPS FOR EDITING ACCOUNT FAMILIES:

The screenshot shows the 'Account Families' section of the CloudCheckr interface. Red annotations provide context for several elements:

- Total Account Families:** A red box highlights the value '3' in the 'Total Account Families' column. Annotation: "You can see Total Account Families Here".
- Total Mapped Accounts:** A red box highlights the value '4' in the 'Total Mapped Accounts' column. Annotation: "This shows you the total number of accounts for this Payer Account."
- Accounts Not in a Family:** A red box highlights the value '0' in the 'Accounts Not in a Family' column.
- Account Family List:** A table lists three account families: 'Customer 1', 'Customer 2', and 'Customer 3'. A red box highlights this list. Annotation: "Here is the list of all the Account Families in this Payer Account".
- Child Accounts:** A table shows the number of child accounts for each family: 'Customer 1' has 1, 'Customer 2' has 2, and 'Customer 3' has 1. A red box highlights this table. Annotation: "Under Child Accounts you can see how many accounts are within each Account Family".
- Accounts Not in a Family (Detail):** A red box highlights the value '1' in the 'Accounts Not in a Family' column for 'Customer 1'. Annotation: "This shows you the number of Accounts NOT in an Account Family. This number should be ZERO at the end of every month."

If you click on one of the Account Families, it will expand to show you details of the account family. Pertinent information can be added/edited on this part of the screen.

- Name: where you can create/edit the Customer name
- Address
- Additional Info
- Email Address: This can be for the end user; however, you may want to enter the email address for someone who does the billing or the accounting department
- Project code: If you have an internal project code, you can add it here. You could even enter your internal customer number in this field
- Invoice ID

The screenshot displays the 'Account Families' section in the CloudCheckr interface. At the top, there are summary statistics: 3 Total Account Families, 4 Total Mapped Accounts, and 0 Accounts Not in a Family. Below this is a table with columns for Account Family Name, Project Code, and Child Accounts. The table lists three account families: Customer 1, Customer 2, and Customer 3. The form for Customer 2 is expanded, showing fields for Name, Address, Project Code, Invoice ID, and Payment Terms. Red arrows highlight the 'Name', 'Address', 'Project Code', and 'Invoice ID' fields. A red arrow also points to the 'Configure AWS Accounts' dropdown menu, with the text 'Click here to Expand' next to it.

Projects Code is one of the options to *group by* in the Advance Grouping Report. Entering a project code or the customer name (if you do not use project codes in your organization) can be helpful when running reports.

When you expand “Configure AWS Accounts” you will see:

- Create a Multi-Account View to mirror the Account Family – check the box if you wish to create a new MAV that mirrors your Account Family
- AWS Accounts tied to this Account Family – here you can add accounts and/or remove accounts

If you expand “Payer Support Charges” you have the option to select the support options that best apply to your account configuration. For more details about this section, please visit:

<https://success.cloudcheckr.com/article/cfqwcj0ux4-payee-support-charges>

Customer 2

Name: Customer 2

Email:

Project Code:

Address:

Payment Terms: NET ?

Invoice ID:

Add Custom Charges ?
Select custom charges

Configure AWS Accounts ^

☐ Create a Multi - Account View to mirror this Account Family **Check this box to create MAV**

AWS Accounts tied to this Account Family

+ Add account to this Family **Click here to Add Accounts to this Family**

089753618136 (Liang Xu)	Remove
115783089165 (Ingram Micro GBI Development)	Remove

Click here to Remove Accounts from this Account Family

Payee Support Charges ^

☐ Suppress AWS Support ☐ Apply by Account ? ☐ Displayed by Account (within Account Families) ?

☐ Business Support ? ☐ Ignore \$100 minimum ?

Select the options that best apply to your account configuration

Copy Billing Report v

Advanced v **Remember to click "Update"**

Update Cancel

Once you have made the changes to the account family, remember to click "Update."

STEPS FOR CREATING ACCOUNT FAMILIES:

If you have any accounts that are not in an account family, and you do not want to add them to an existing one, you will need to create a new Account Family.

When you click on the green plus sign in the top right corner, you will have the option to:

- Create Account Family
- Create an Account Family for each account without a family – clicking on this will make each unmapped account into a new account family
- Add an Account Manually – This will allow you to enter the AWS account number and assign the account the account family of your choice.

Account Families

Total Account Families	Total Mapped Accounts	Accounts N
3	4	0

Account Family Name	Project Code
> Customer 1	
> Customer 2	
> Customer 3	

Create Account Family

Create an Account Family for each account without a family

▼ Add an account manually

AWS Account Number

Add to an Account Family (optional)

Select Account Family

Add Cancel

Click here to create an Account Family

As accounts are added to the payer, it is important to add them to their appropriate Account Family in a timely manner, at least monthly but as often as weekly or daily depending on the frequency of new account creations.