

Account Class- Require Billing Contact Field Added (13989) [Enhancement]

Last Modified on 01/23/2023 3:07 pm EST

A new field 'Require Billing Contact' has been added to Account Class setup that controls if a billing contact is required when a new account is created. If 'Yes' is selected, the user will not be able to save the new account until contact fields have been completed.

The screenshot shows the 'UPDATE ACCOUNT CLASS' interface with the following fields and values:

| Field Name | Value |
|--------------------------------------|---------------------|
| NAME | Commercial |
| ACTIVE | Yes |
| TYPE | Business |
| GL ACCOUNT | Accounts Receivable |
| GL SEGMENT | |
| DEFAULT ACCOUNT CREDIT LIMIT | 0 |
| DEFAULT ACCOUNT TERM | Net 30 |
| DEFAULT REBATE PAYMENT TYPE | |
| DEFAULT BILL BY SERVICE LOCATION | No |
| CREATE CONTACT DEFAULT | Account |
| DEFAULT CONTACT SERVICE NOTIFICATION | Yes |
| GEOCODING TYPE | Roof Top |
| GEO FENCE RADIUS | 30.00 |
| NSF FEE | |
| NEW CUSTOMER NOTIFICATION TEMPLATE | |
| REQUIRE GENERATOR TYPE | No |
| ENABLE LINKING CONTACTS TO ALL SITES | Yes |
| LOAD ACTIVE ACCOUNTS IN PIPELINE MAP | Yes |
| REQUIRE BILLING CONTACT | Yes |

Additional fields in the 'Status Management' section:

| Field Name | Value |
|--|--------|
| ENABLE AUTOMATIC STATUS UPDATE | Yes |
| AUTO CREDIT HOLD PAST DUE DAYS | 61 |
| AUTO CREDIT HOLD MINIMUM PAST DUE AMOUNT | 200.00 |
| AUTO INACTIVE ACCOUNT/SITE DAYS | 30 |
| AUTO CREDIT HOLD PLACEMENT | No |
| AUTO CREDIT HOLD REMOVAL | Yes |
| STATUS UPDATE TIME | 6 PM |
| RUN DAILY AUTO APPLY | No |

Additional fields in the 'Finance Charges / Late Fees' section:

| Field Name | Value |
|-----------------------------|-------------------|
| FINANCE CHARGE TYPE | Accrued Daily |
| ANNUAL RATE | 18.00 |
| CHARGE CODE | 4 Yard Extra Pick |
| CHARGE MINIMUM | 5.00 |
| PAST DUE MINIMUM | 10.00 |
| APPLY FIN. CHARGE FROM DAYS | 1 |

The 'Require Billing Contact' field is highlighted with a red box, and a red arrow points to the 'Yes' option. The 'Saved.' status is visible in the bottom right corner.

Pathway: Set Up > Customer > Customer Account Class

Articles: N/A