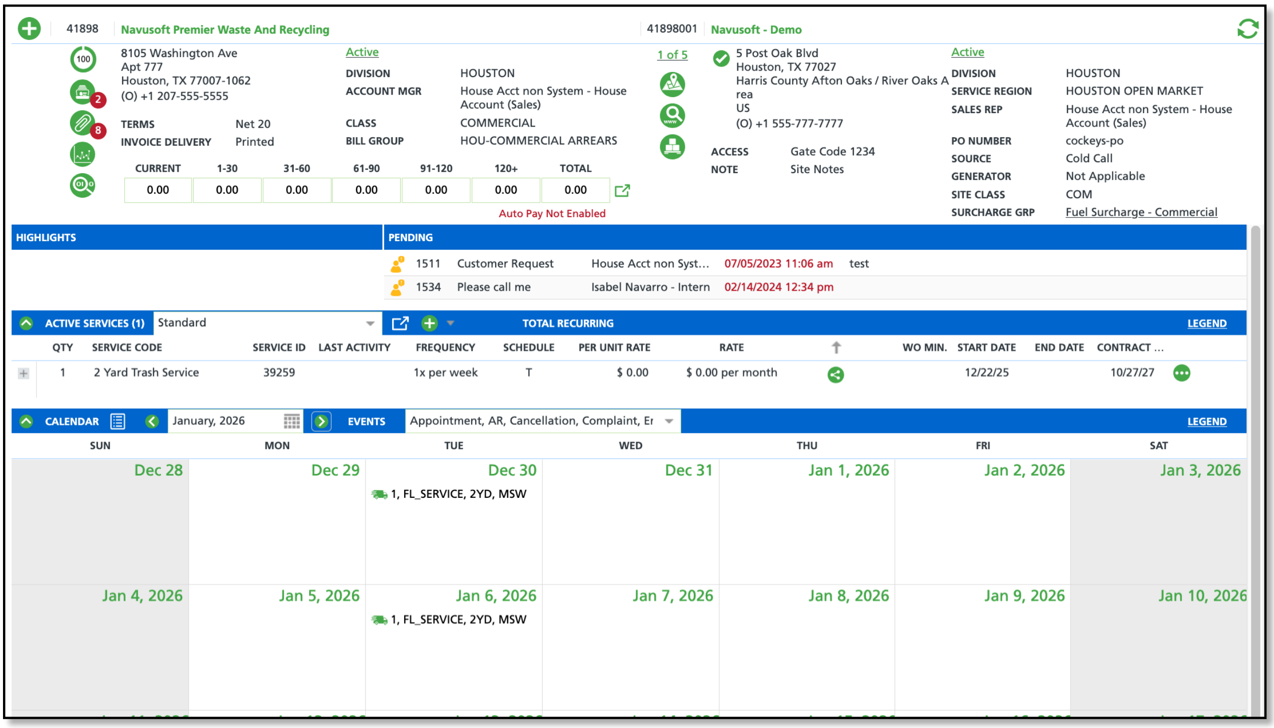
Account Screen Overview

Last Modified on 12/22/2025 12:41 pm PST

Pathway: *Accounts > Search (Account) > Customer Service Screen*

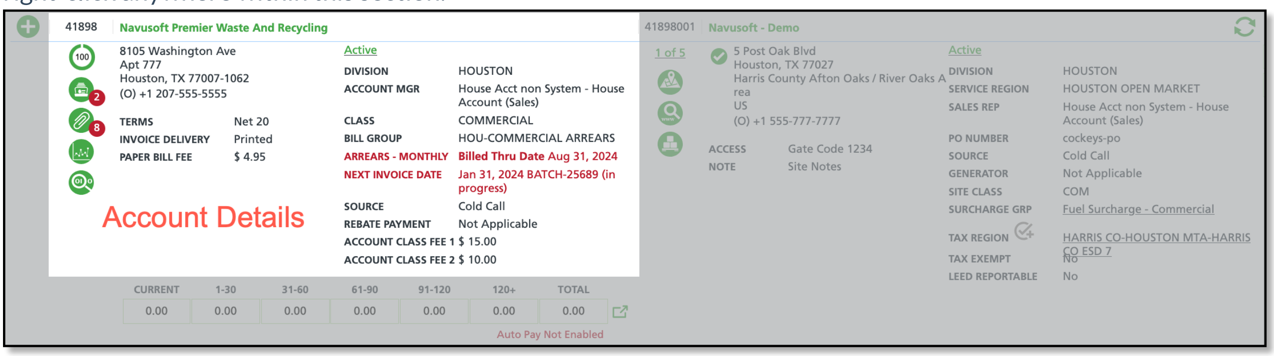


Permissions

Permission ID	Permission Name
5	View Account
6	View Site
41	View AR History
59	Search

Account Details Section

The left side of the customer service screen displays account-related information. To edit an account's information, right-click anywhere within this section.

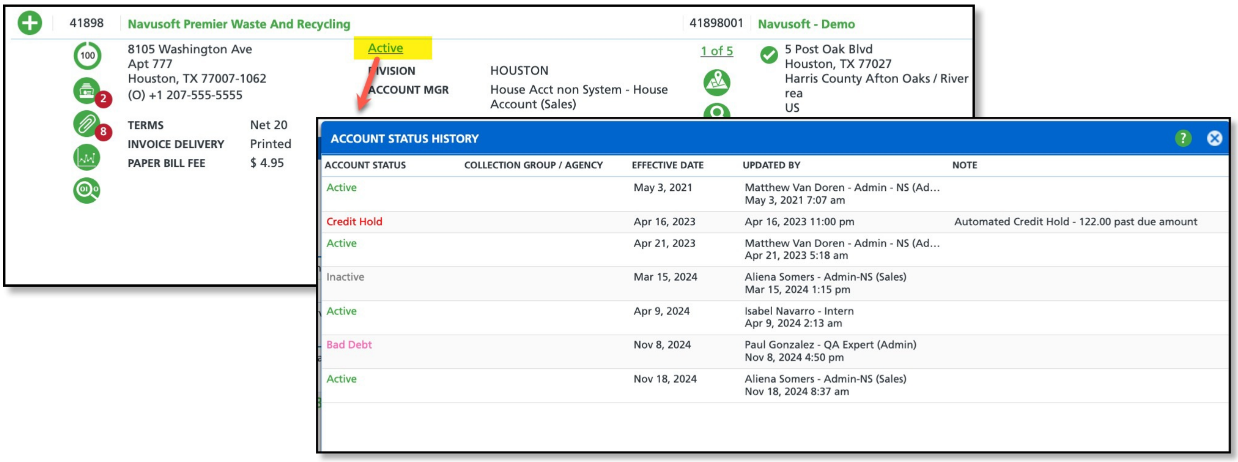


Account Status - View Account Status History

The account's status is shown in the Account Details section of the customer service screen. Clicking on the status displayed will open a read-only 'Account Status History' popup window. To update the account's status, right-click within the account details section and select 'Edit.' For additional information on account status changes, please refer to the related article linked below.

Related Articles

Account Status Changes



Edit Account

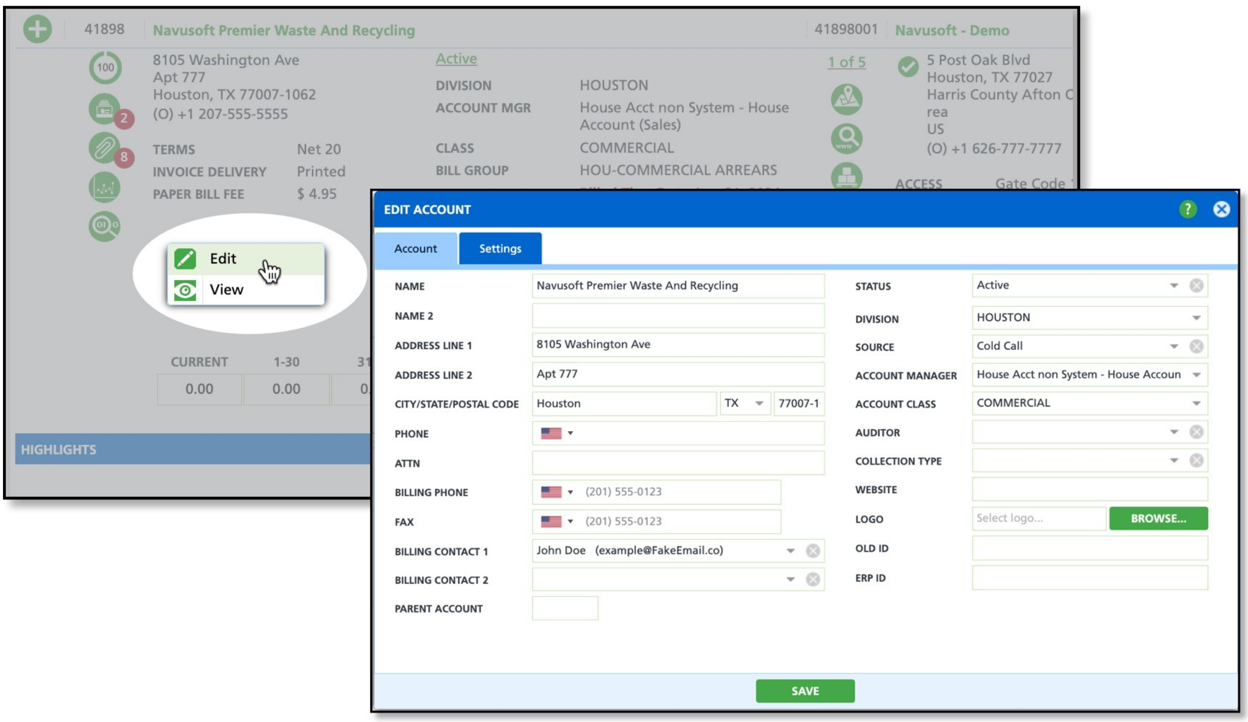
To access the 'Edit Account' popup editor and make changes to the account's setup, right-click within the Account Details section and choose the "Edit" option. Edits are posted upon save.

Related Articles

Edit Account and Site Information

Logic Notes

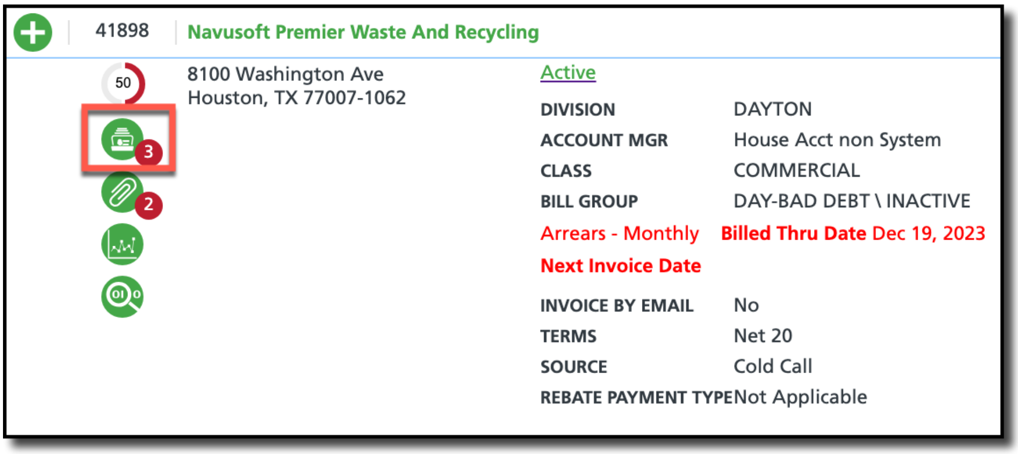
Edit functionality is guarded by permissions. **Permission 68: Edit Non-Prospect Account** is required.



Add Account Contacts

Use the View Contacts tool to add or remove contacts and control which sites a contact has portal access to. A red bubble indicates the total number of contacts associated with an account.

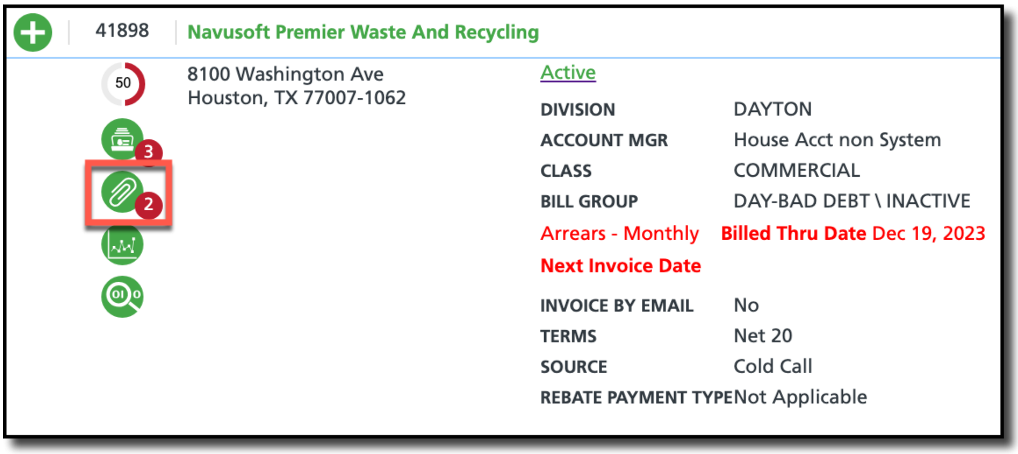
Related Articles
Add and Edit Account Contacts



Add Photos, Attachments, Blanket Purchase Orders and Waste Profiles

Use the Attachments tool to add or remove photos and attachments for all sites under an account. Users can choose to display uploaded attachments in the portal for portal users to view. A red bubble indicates the total number of photos, attachments, blanket purchase orders, and waste profiles associated with the account.

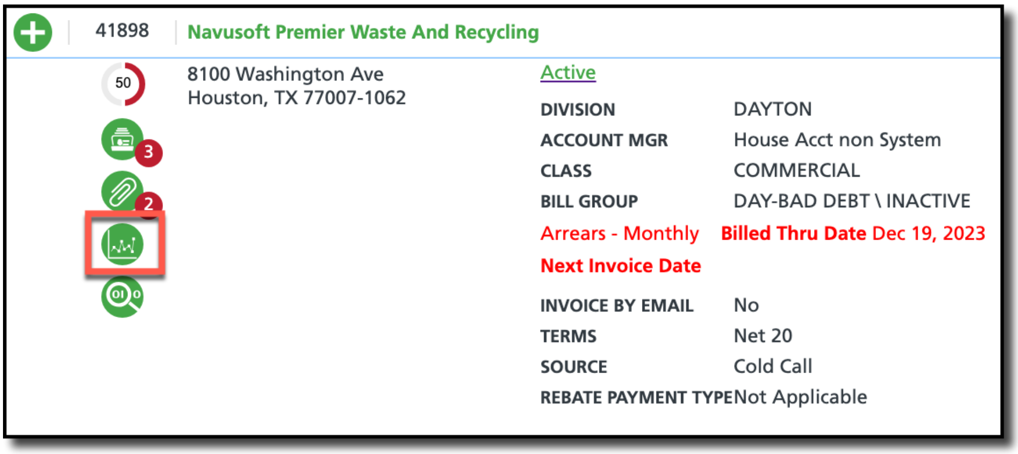
Related Articles
Add Photos and Attachments
Add a Blanket Purchase Order



Customer Analysis and Reports

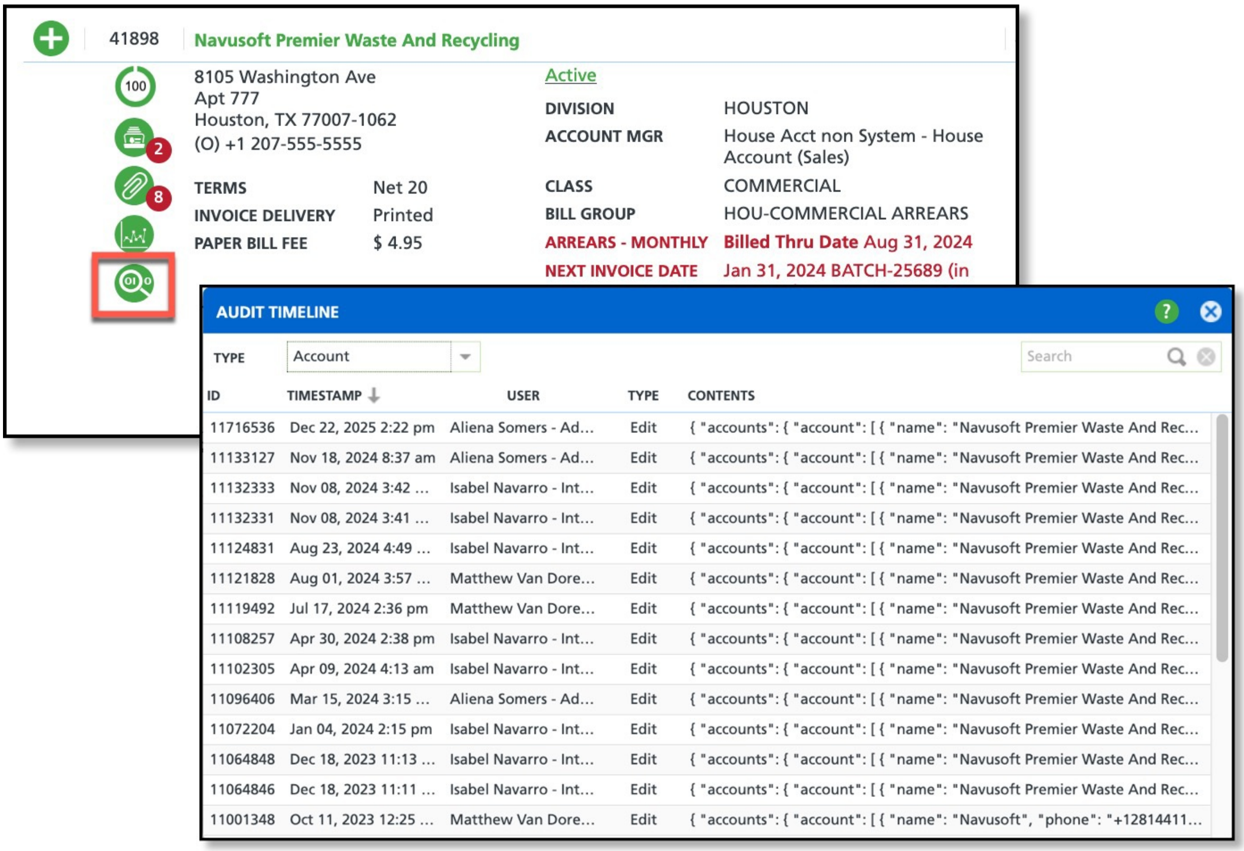
View account related analysis and reports for customer details and services. Users can select from multiple reports to review data such as Revenue by Period, LEED Details, and Work Order Weights.

Related Articles
LEED Reporting



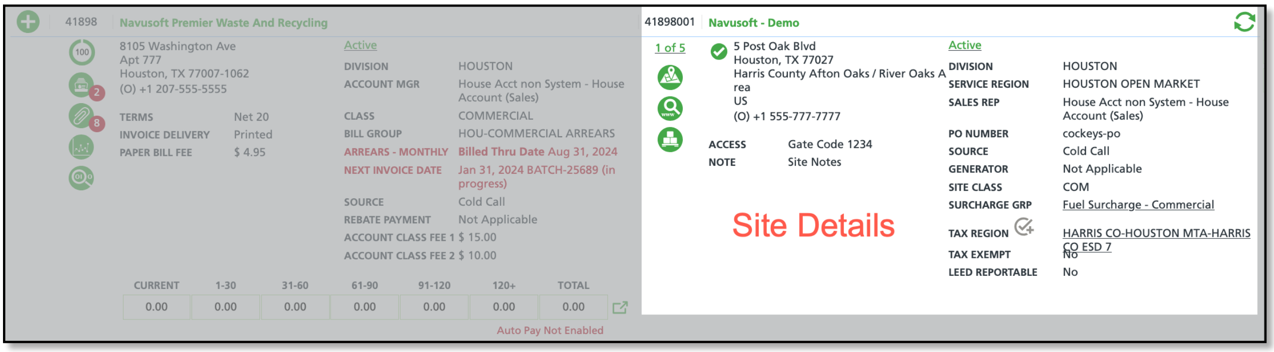
View Audit Timeline

Use the Audit Timeline to review which system users made edits to an account or site. This feature allows you to view the timeline based on either account level changes or site level changes.



Site Details Section

The right side of the customer service screen displays information related to the site being viewed. Right-click within this section to edit only the site's information. By default, site details is collapsed, click anywhere within this section to expand its details further.

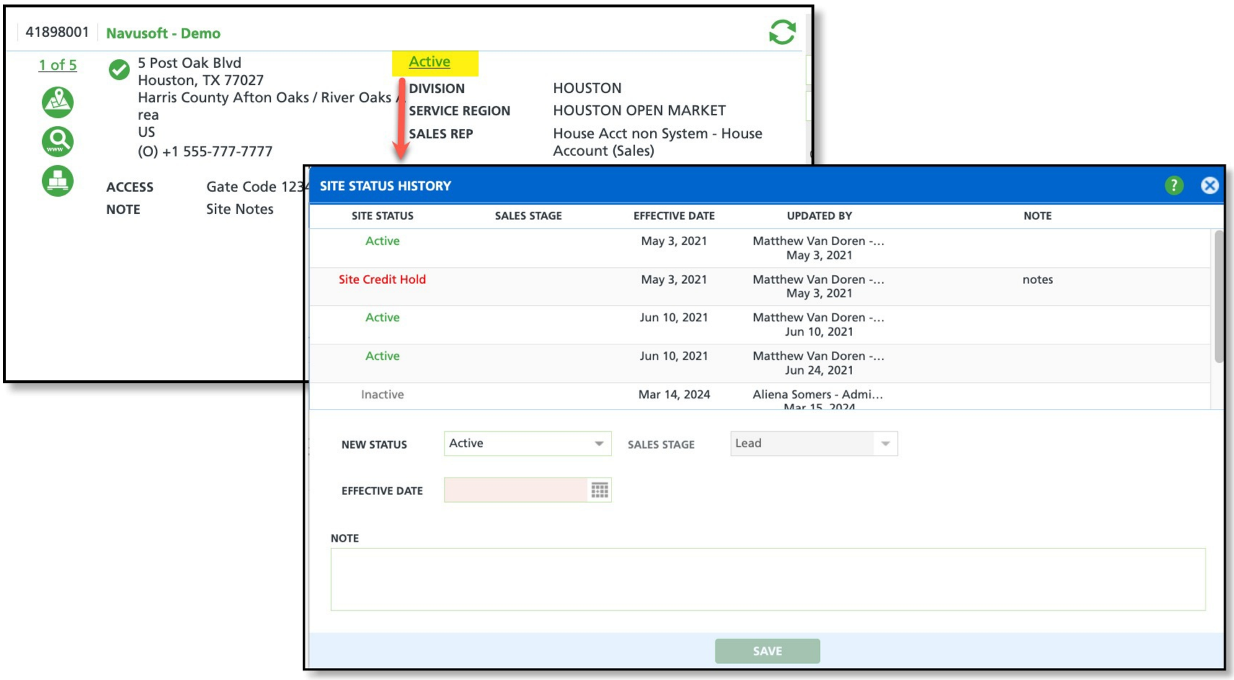


View Site Status History

The status of a site displays in the Site Details section and will vary dependent on the sites's current standing. Selecting the current status that is displayed will open the 'Site Status History' editor. Additional information related to updating the status of a site can be accessed from the related articles link below.

Related Articles

Site Status Changes



Edit Site

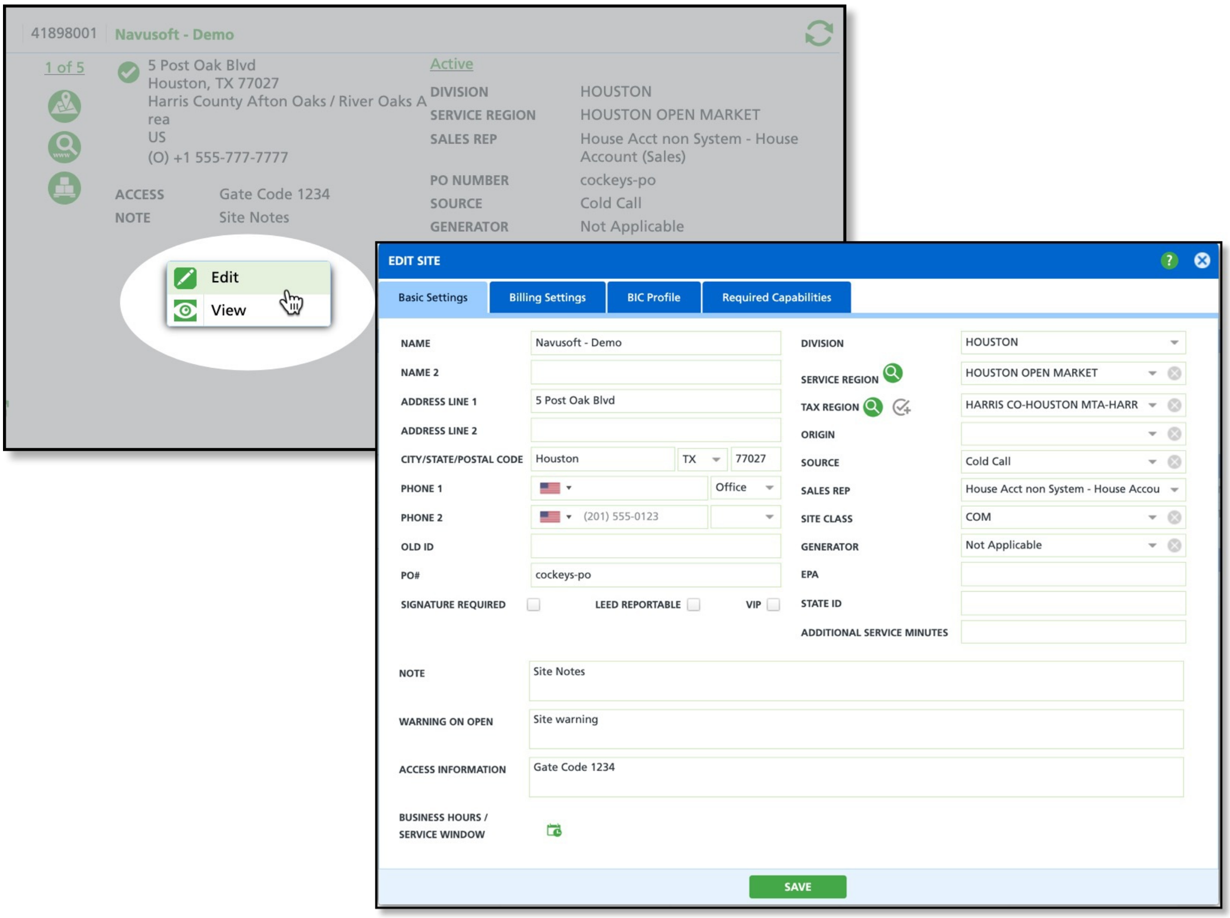
Right click within the Site Details section to display the Edit option. Select 'Edit' to open the 'Edit Account' popup editor to make modifications to the account's current setup. Edits will be posted upon save.

Related Articles

Edit Account and Site Information

Logic Note

Edit functionality is guarded by permissions. **Permission 69: 'Edit Non-Prospect Site'** is required.

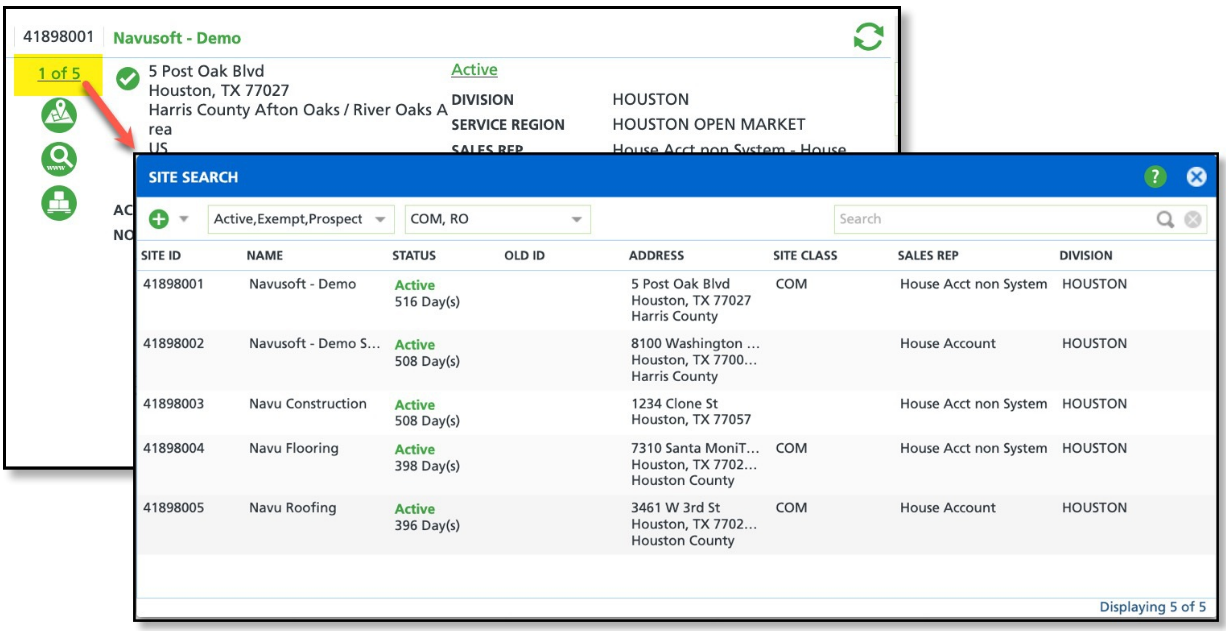


Change Between Sites

Select to open a list of all the sites belonging to the account. From the populated list that displays, select the site you would like to open and the screen will update to the selected site.

Related Articles

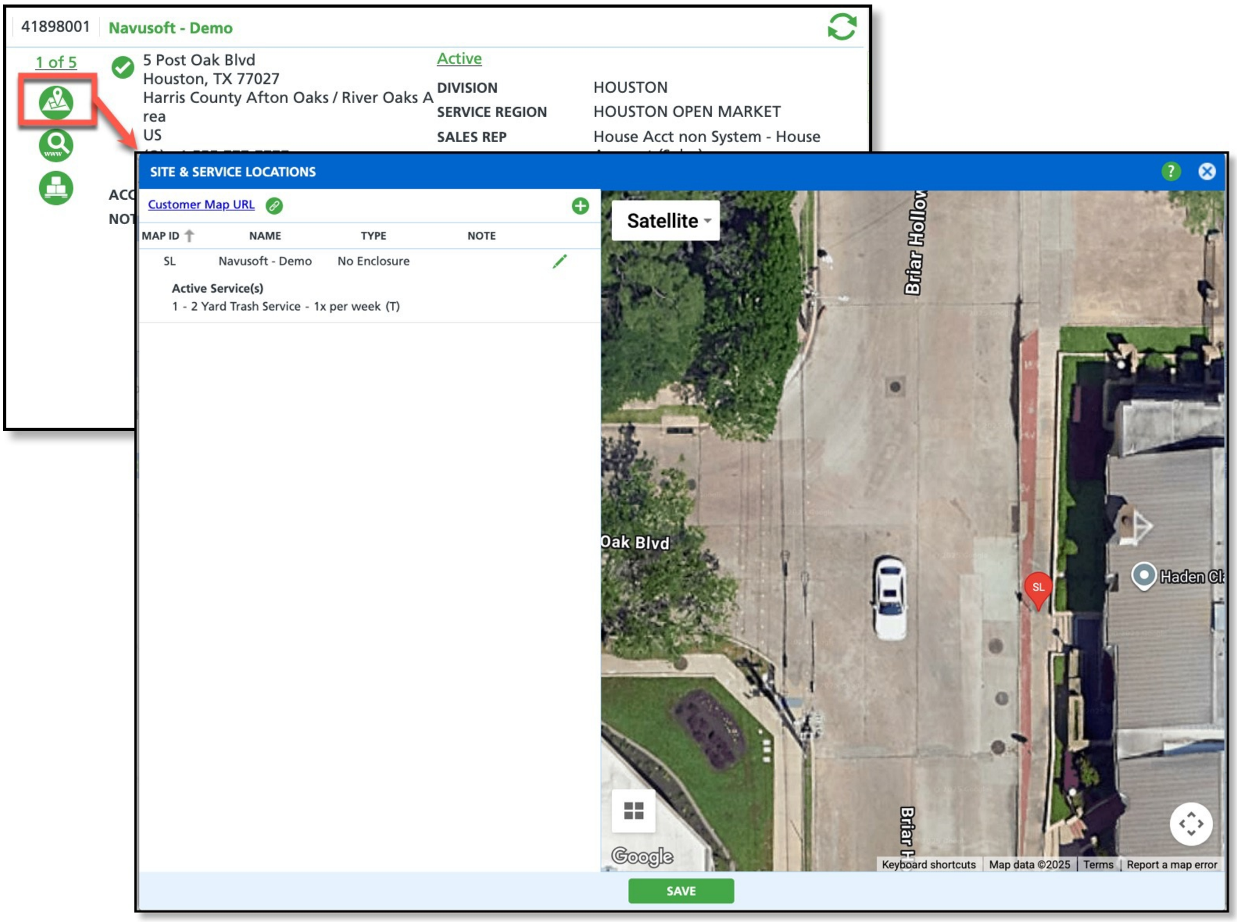
[Navigate Between Sites and Add a New Site]



Geocode Site

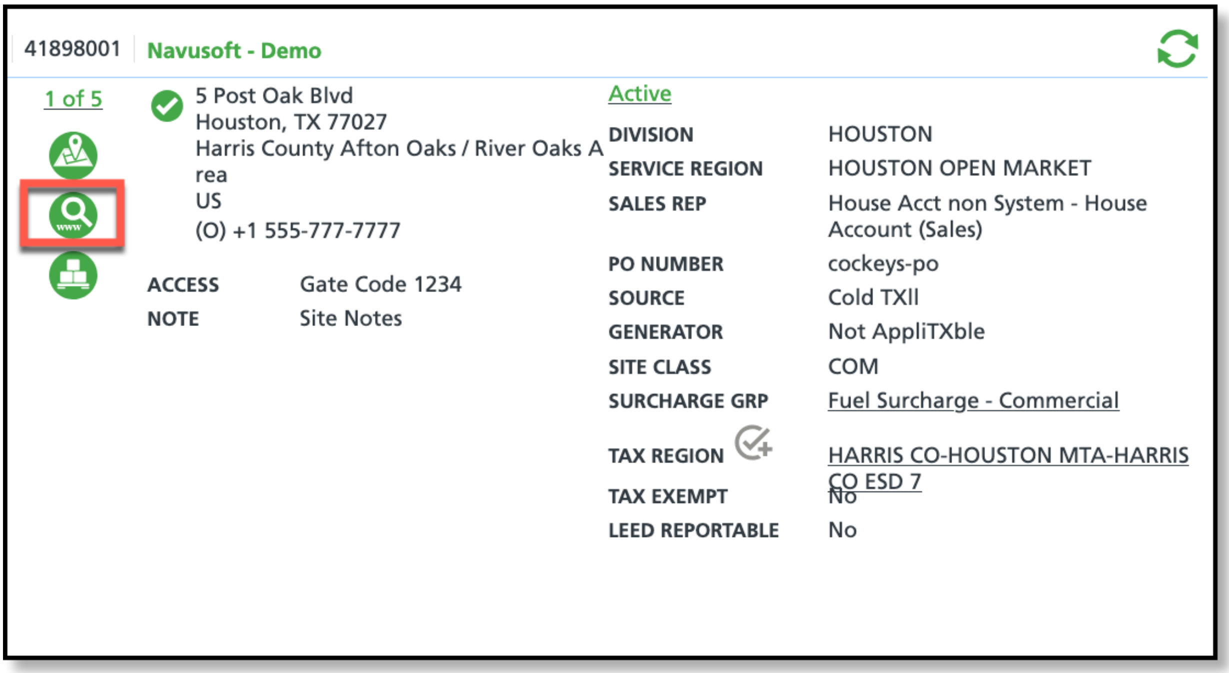
Use the Geocode Service Location tool to direct a driver to the specific servicing location at a site. This tool includes an interactive map to create and place a unique pin over the spot the driver should go to service the site. Users might find this tool helpful if a site has multiple active services that are not all on the same servicing schedule.

Example: A site has multiple service locations (at the same address) and not all locations follow the same servicing schedule, create a unique pin for each location so the driver knows where to service.



Display Web Search Results

Select to view all google related results when searching the Site Location. Clicking the icon will redirect to a google web search within your browser in a separate window.



Display Inventory Equipment and Trucks

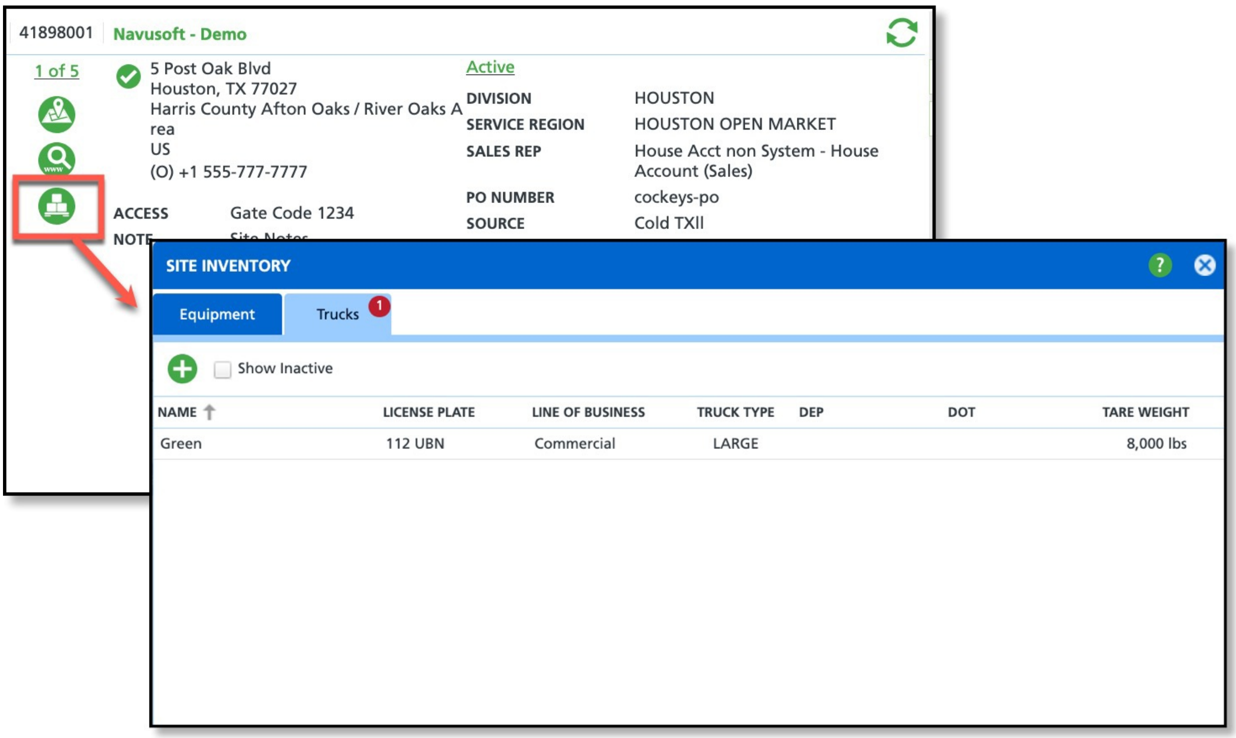
Site Inventory keeps track of the equipment and trucks used at a site. Users can use this feature to document equipment additions, removals, and transfers to other sites or a storage yard.

Related Articles

Site Inventory (Equipment)

Site Inventory (Trucks)

Inventory Management



Surcharge GRP (Group)

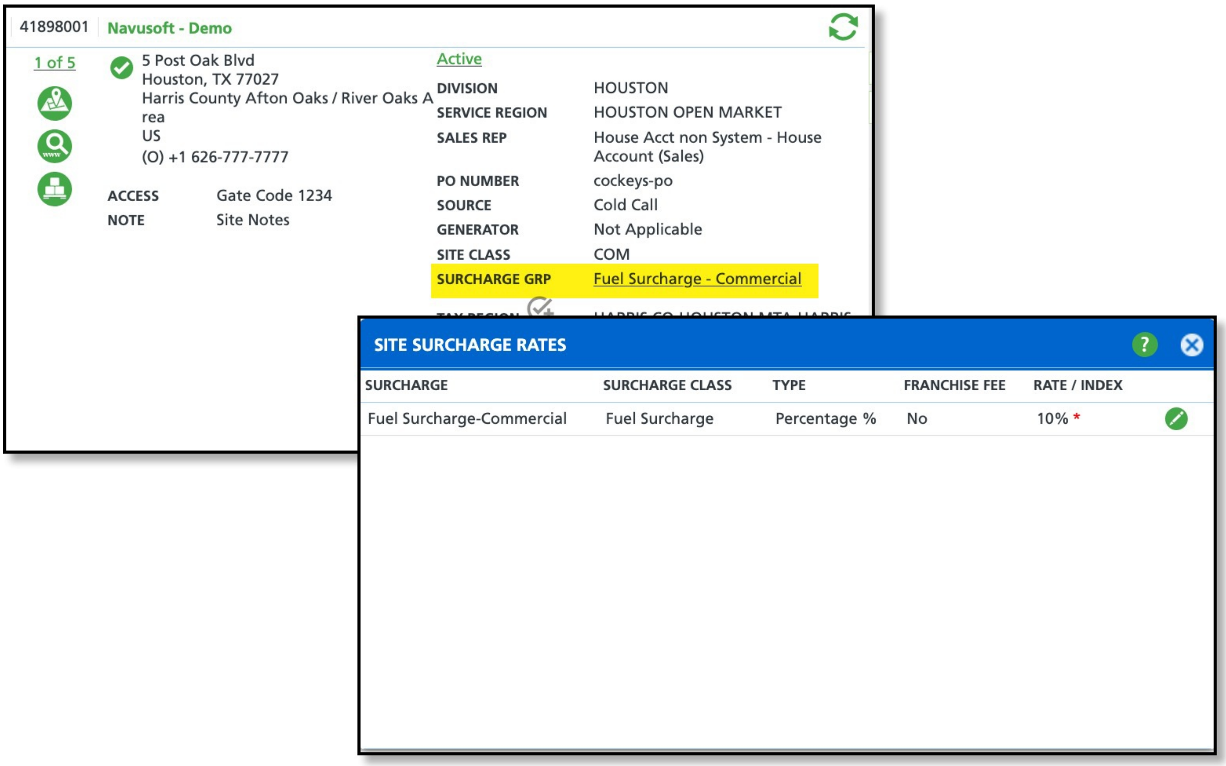
If a Surcharge Group has been added to the site's billing settings, the surcharge group name is displayed. Click the surcharge group name (shown as a clickable link) to view applicable surcharges or override surcharge rates.

Related Articles

Surcharge Setup
Fuel Rate Index Surcharge Setup and Application

Logic Note

Only surcharges associated with an active service at the site are displayed; not all surcharges assigned to the surcharge group will appear.



AR History

The AR History tool on the Customer Service screen displays aging buckets that categorize an account's outstanding balances by time period. The Current bucket reflects recently billed invoices with payment due dates that have not yet passed.
Select the green arrow icon to open the AR History for the account to print a statement, generate an invoice, and update the credit card or bank account information on file.

CURRENT	1-30	31-60	61-90	91-120	120+	TOTAL
84.92	0.00	0.00	649.95	0.00	222.00	956.87

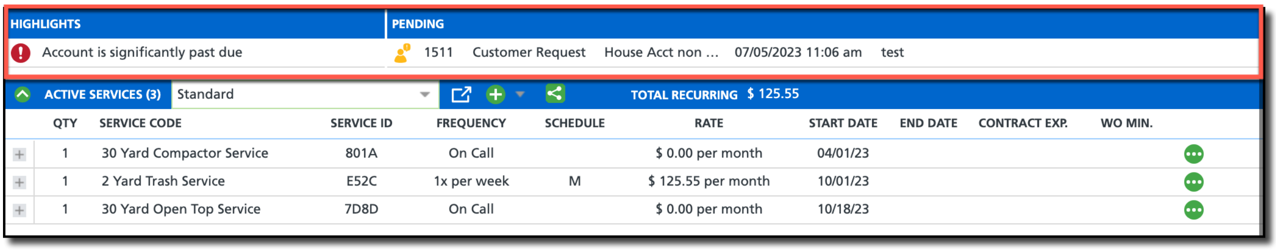
Related Articles

AR History Overview
Reverse/Transfer/Split Payments
Generate Single Invoice
View Details/Adjust Invoice
AR History Account Transactions

Void, Refund and Payment Chargebacks

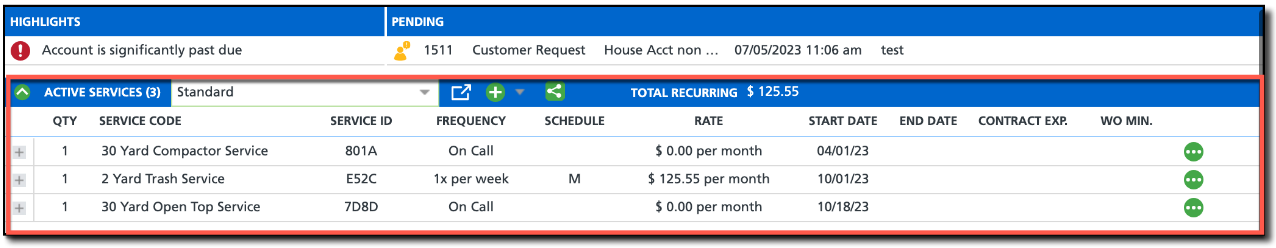
Highlights/Pending

Important account information such as past due invoice payments display in the **Highlights** section and are specific to the site being viewed. The **Pending** section displays actionable items that may affect the servicing or billing of an account.



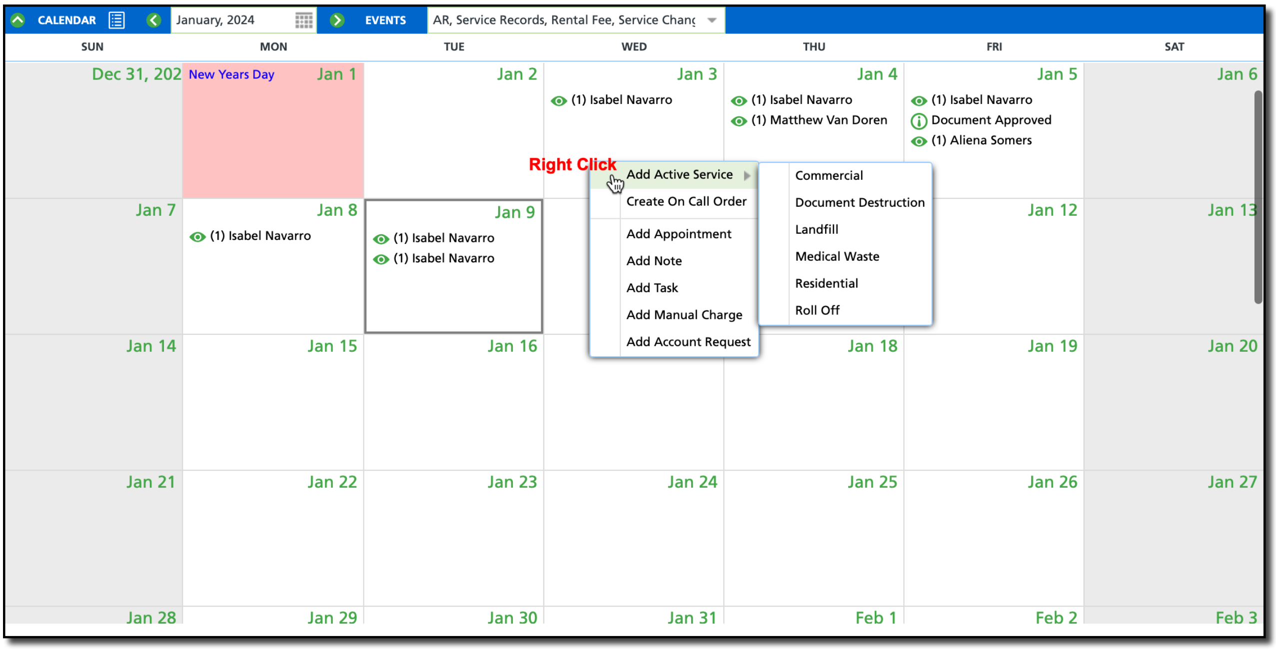
Active Services

From the Active Services section, view servicing details for current, upcoming, and ending services by selecting the expand option for a service. Users can also add new services, edit existing services, view rate history, access additional features by right clicking on a service, and add a service note by selecting the green dot icon.



Calendar

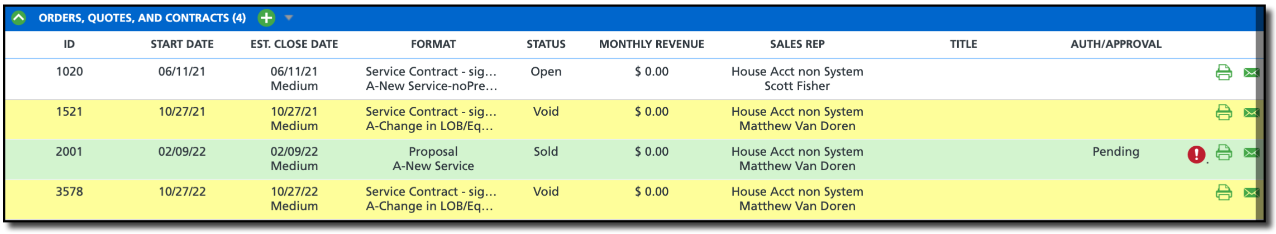
The Calendar tool within a customer account provides several features for servicing the account. Right click within a date on the calendar to add new services, notes, tasks, manual charges, appointments, or to schedule an On Call Order. Active services display on the calendar on the day the service is scheduled.



Related Articles
Calendar Information
Add Task
Add Appointment
Add Manual Charge
Add Note

Orders, Quotes and Contracts

Create and manage proposals, order forms and service agreements from the Orders, Quotes and Contracts section of Customer Service screen.



Service History

A history of all the services a location has received, (or will be receiving) is available to view from the site's Service History section. Select the arrow icon to open the Service History popup window. From here users can view the details for each of the services, print/email a manifest and open the Service Record editor by double-clicking within the row of the desired service.