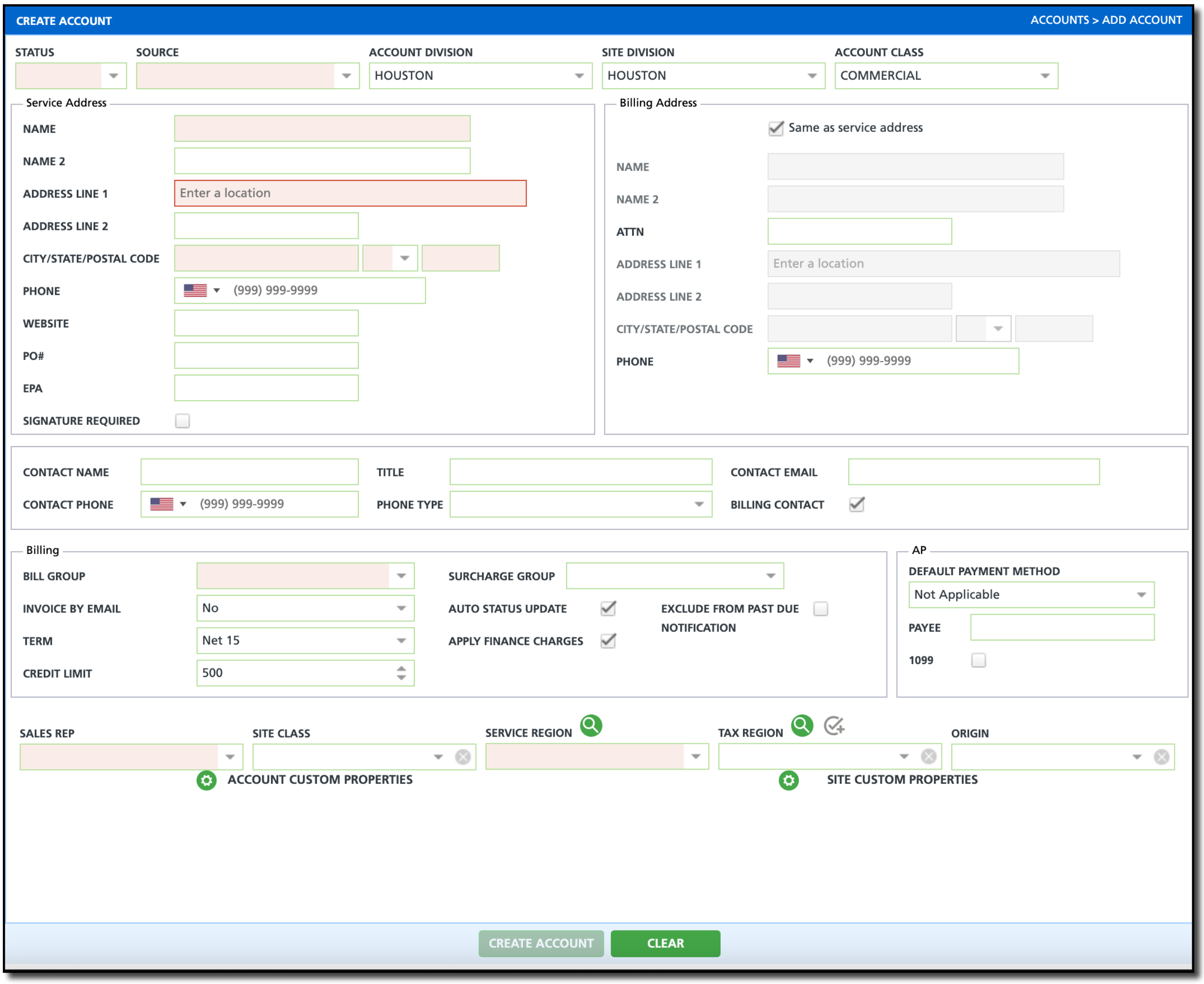
Create Account: Screen Field Descriptions

Last Modified on 06/24/2026 3:34 pm PDT

Pathway: *Accounts > Add Account*

This article captures the descriptions for the fields that display when a new account is created. **NOTE:** If the status of the account is "Prospect," the Billing section is hidden from view.



Permissions

The following permissions are required to add accounts and sites:

Permission ID	Permission Name	Description
2	Add Prospect Accounts and Sites	Allows for the creation of a prospect account or site.
5	View Account	Necessary to view the account after it is created and complete any additional setup.
60	Add Account	Displays the 'Add Account' option in the Accounts module.

66	Add Active Account	Displays the 'Active' as a status option. Not having this permission forces creation of prospect account in scenarios where users should not be creating active accounts. **Example:** Limit your sales reps' access so they can only create prospect accounts.
67	Add Active Site	Displays the 'Active' as a status option. Not having this permission forces creation of prospect site in scenarios where users should not be creating active sites. **Example:** Limit your sales reps' access so they can only create prospect sites.

Field Descriptions

Account/Site Identifiers

Field	Description
Status	Identifies the account as being either 'Prospect' or 'Active.'
Source	Indicates how the account was acquired. Referral, Acquisition, etc. Making a selection here helps with future marketing endeavors. Sources are managed in *Setup > Account > Source.*
Account Division	Identifies the division the account belongs to. Divisions serve as distinct operating unit for organizing accounts. It plays a key role in streamlining operations, billing, and reporting processes. Additional information about divisions and their setup can be viewed here: Division Setup.
Site Division	The division the site specifically belongs to.
Account Class	Specifies the category or classification assigned to accounts to group them based on similar characteristics, functions, or purposes. Account classes help organize accounts for easier management, reporting, and operations. Additional information about account class setup can be viewed here: Account Class Setup.

Address Fields

Field	Description
Service Address Fields Service Address fields apply to the physical location where services are rendered.	
Name	The name for the account or site.
Name 2	Identifies a subsidiary name for the account (Dept., c/o, etc.).
Address Line 1	Entry field for the building number and street name/number for the service location. * This field uses Google Location. Begin entering the location's name or address (ex: Bill's Hardware or 123 Radio Dr.) to initiate the search feature. Select the address from the search results to auto-fill all address fields for the account.
Address Line 2	Suite#, Floor#, PO Box#, etc.
City/State/Postal Code	City, State and Postal Code for the service location.
Phone	The phone number for the service location.

Website	The link to the website for the customer.
PO#	The purchase order number for the customer.
EPA	Environmental Protection Agency (EPA). Enter the State ID or other number found in the contract.
Signature Required	If selected, requires the driver to get a signature from the service location.
Billing Address Fields The Billing Address fields are associated to the specific address used for billing and may be different than the Service Address.	
Same as Service Address	Indicates the service address and mailing address are the same. This box defaults to being checked.
Name	The name for the account.
Name 2	Identifies a subsidiary name for the account (Dept., c/o, etc.).
Attn	Where the mailing should be directed to when received at the address.
Address Line 1	Enter the building number and street name/number here for mailings to be sent. *** This field uses a Google location search. Begin entering the location's name or address (ex: Bill's Hardware or 123 Radio Dr.) to initiate the search feature. Select the correct address from the search results to auto-fill all additional address fields.*
Address Line 2	Suite#, Floor#, PO Box#, etc.
City/State/Postal Code	Enter the City, State and Postal Code where mailings are sent.
Phone	Identifies the phone number that should be used for billing purposes.

Contact Fields

Field	Description
Contact Name	Identifies who the contact for the account/site is.
Contact Phone	Reachable phone number for the account/site contact.
Title	The title or role of the account/site contact.
Phone Type	Indicates if the phone number listed is mobile, home, office, fax or other.
Contact Email	Email address for the account contact. This field is required if "Invoice By Email" in the Billing section is set to either "Email with Link" or "Email with PDF Attachment."
Billing Contact	If selected, indicates the site contact is also the billing contact.

Billing Fields

Field	Description
Billing Fields The billing fields only display if the account status is "Active."	

Bill Group	Division specific bill group an account must be assigned to. Available selections are dependent on the selected Division.
Invoice By Email	Delivery method for the invoice. • **No:** If selected, invoices will be printed and mailed. • **Email With Link:** If selected, invoices will be emailed with a clickable link for the user to access. • **Email With PDF Attachment:** If selected, invoices will be sent as a PDF attachment in the email. • **Print and mail to division Redirect Invoice Address:** Setting for this option is established in Setup > System > Division > Addresses (tab)
Term	Refers to the payment terms or the period within which a customer is expected to pay their invoice. For example, *Term20* would mean that payment is due 20 days from the invoice date.
Credit Limit	The maximum amount of credit a company is willing to extend to a customer. This limit sets a cap on the outstanding balance a customer can carry before making a payment.
Surcharge Group	Indicates if the account is subject to a surcharge. Service regions may be set up to have a default surcharge group.
Auto Status Update	Determines if the account should be automatically updated to an inactive status when past due on a single invoice, or active after payment has been collected. Additional information related to automatic credit holds can be reviewed here: Automatic Credit Hold Setup.
Apply Finance Charges	Indicates if late fees should be applied when the account is past due. Additional information about finance charges related to credit holds can be found here: Automatic Credit Hold Setup. **Note:** If 'Calculate Manual Finance Charges and Late Fees' (Accounting) is configured, and the account does not have the 'Apply Finance Charges' option selected, no manual late fees or finance charges will be applied.
Exclude From Past Due Notification	If selected, past due notifications will not be sent to the customer.
AP Fields	
Default Payment Method	The form of payment being used by default for this account.
Payee	The company receiving the payment.
1099	The 1099 checkbox is an indicator with no further functionality, simply signaling the relevance of an account for 1099 reporting.

Sales/Other Fields

Fields	Descriptions
Sales/Other Fields	
Sales Rep	Identifies the sales representative responsible for the account.
Site Class	Used to categorize sites within an account, primarily used in target pricing.
Service Region	Refers to the geographic location within the division the site's location resides within. Additional c including setup and perimeter mapping to default this setting by address, is available here: Service
Tax Region	Identifies the tax region for the account. If no tax region is selected the account is considered tax e

Related Articles:

[Add a New Account (Active)]
[Add a New Account (Prospect)]
[Add Contact]