Create Account: Screen Field Descriptions

Pathway: *Customer > Add Account*

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

Permissions

The following permissions are required to add accounts:

Permission ID	Permission Name
2	Add Prospect Accounts and Sites
3	View Account

Create Account

Fields	Descriptions
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.
Account Division	The division the account belongs to. The division the account is assigned determines who handles t other areas such as Dispatch and Operations.
Site Division	The division the specific site belongs to.
Account Class	The classification of the account.

Service Address Fields
Service Address fields apply to the physical location where services are rendered.

Name	The name for the account.
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' 123 Radio Dr.) to initiate the search feature. Select the address from the search results 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 Hardware or 123 Radio Dr.) to initiate the search feature. Select the correct address fr 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.

Account Contact Fields

Contact Name	Identifies who the contact for the site is.
Contact Phone	Reachable phone number for the site contact.
Title	The title or role of the site contact.
Phone Type	Indicates if the phone number listed is mobile, home, office, fax or other.
Contact Email	Email address for the site contact.
Billing Contact	If selected, indicates the site contact is also the billing contact.

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

Bill Group	Division specific billing group the account is placed in.
Invoice By Email	Delivery method for the invoice. • **No:** If selected the invoice can only be printed and mailed. • **Email With Link:** If selected, the invoice will be emailed as a link attachment. • **Email With PDF Attachment:** If selected, the invoice will be included in the email as an attach document.
Term	Indicates the length of time the customer has to pay the balance on the invoice.
Surcharge Group	Indicates if the account is subject to a surcharge. Service Regions may be set up to have a default S
Auto Status Update	Determines if the account should be automatically updated to an inactive status when past due.
Apply Finance Charges	Indicates if late fees should be applied when the account is past due.
Exclude From Past Due Notification	If selected, past due notifications will not be sent to the customer.

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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 a reporting.

Sales/Other Fields

Sales Rep	Indicates 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 location of the customer usually by city, town or county.
Tax Region	Identifies the tax region for the account. If no tax region is selected the account is considered tax e

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