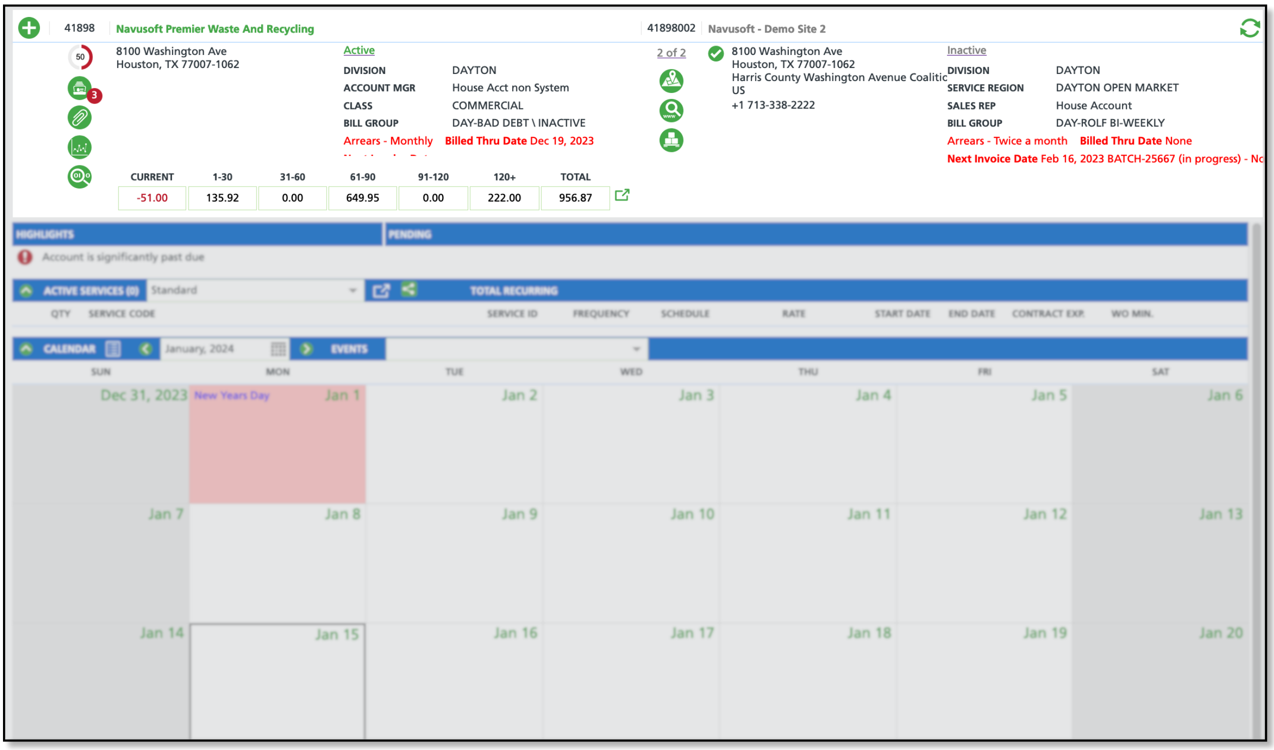
Edit Account and Site Information

Last Modified on 07/09/2025 8:57 am PDT

Pathway: *Accounts > Search - Customer Service Screen*

Efficiently modify details for either a parent account or a site by using right-click functionality to access the account and site editor screens.



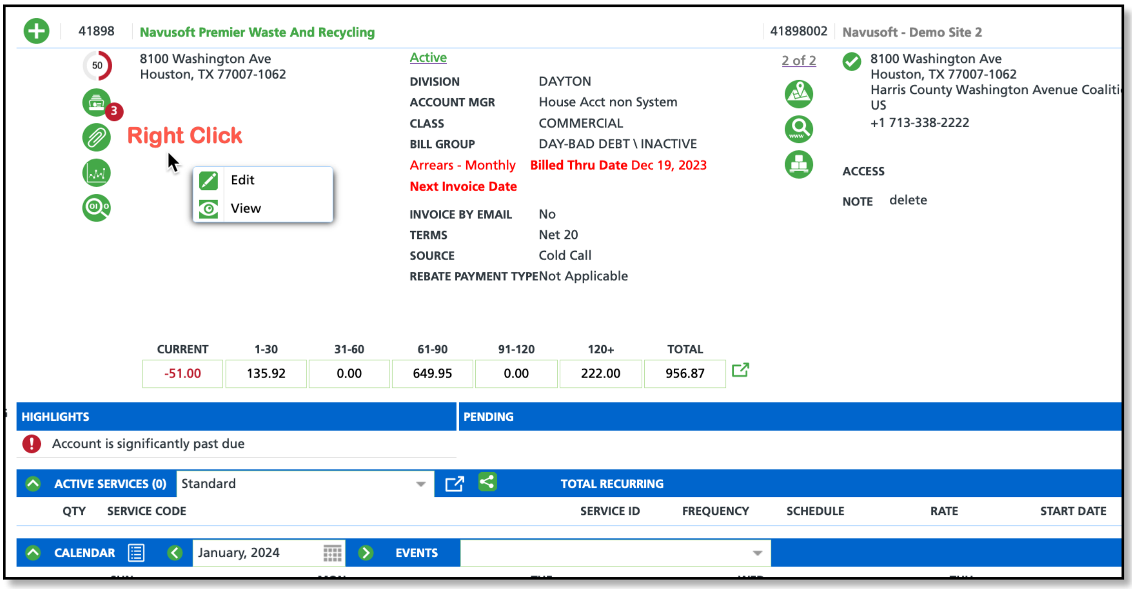
Permissions

The following permissions are required to view and edit account and site information:

Permission ID	Permission Name
5	View Account
6	View Site
68	Edit Non-Prospect Account
69	Edit Non - Prospect Site

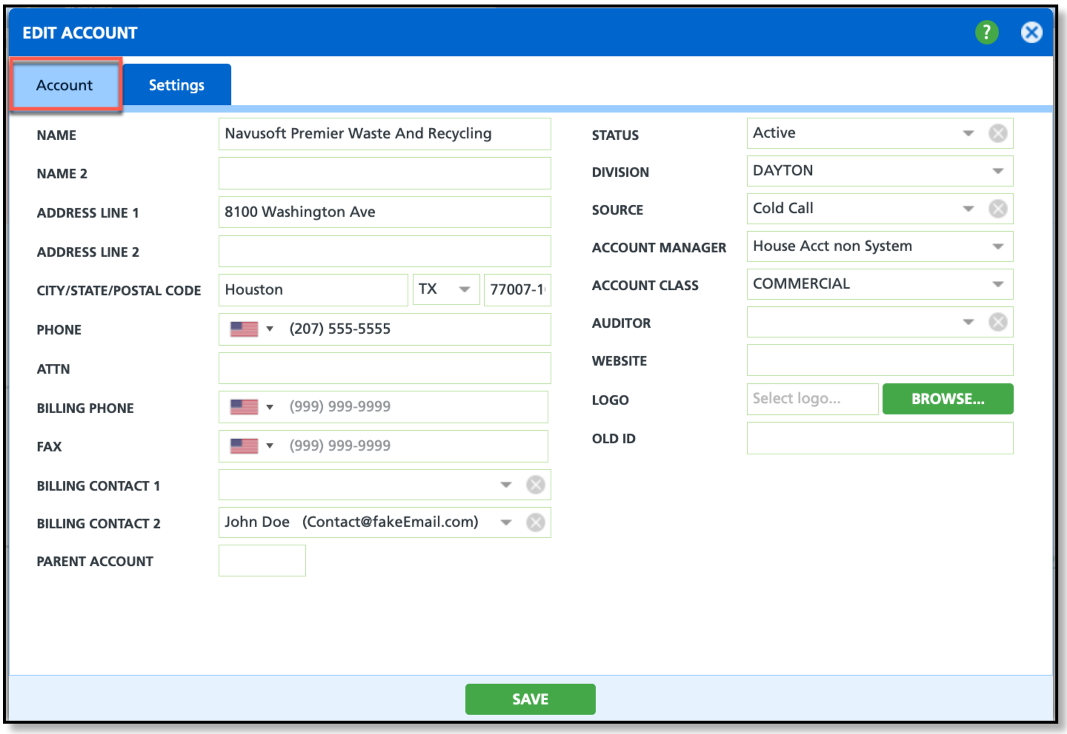
Edit Account Details

Information located along the left side of the Customer Service screen is account-level information and applies to all sites under an account. Right-click within the account area and select Edit to open the Edit Account editor.



Edit Account: Account

The Account tab includes vital account details like contact information, account name, account status, and other essential information for accounting and operational purposes.



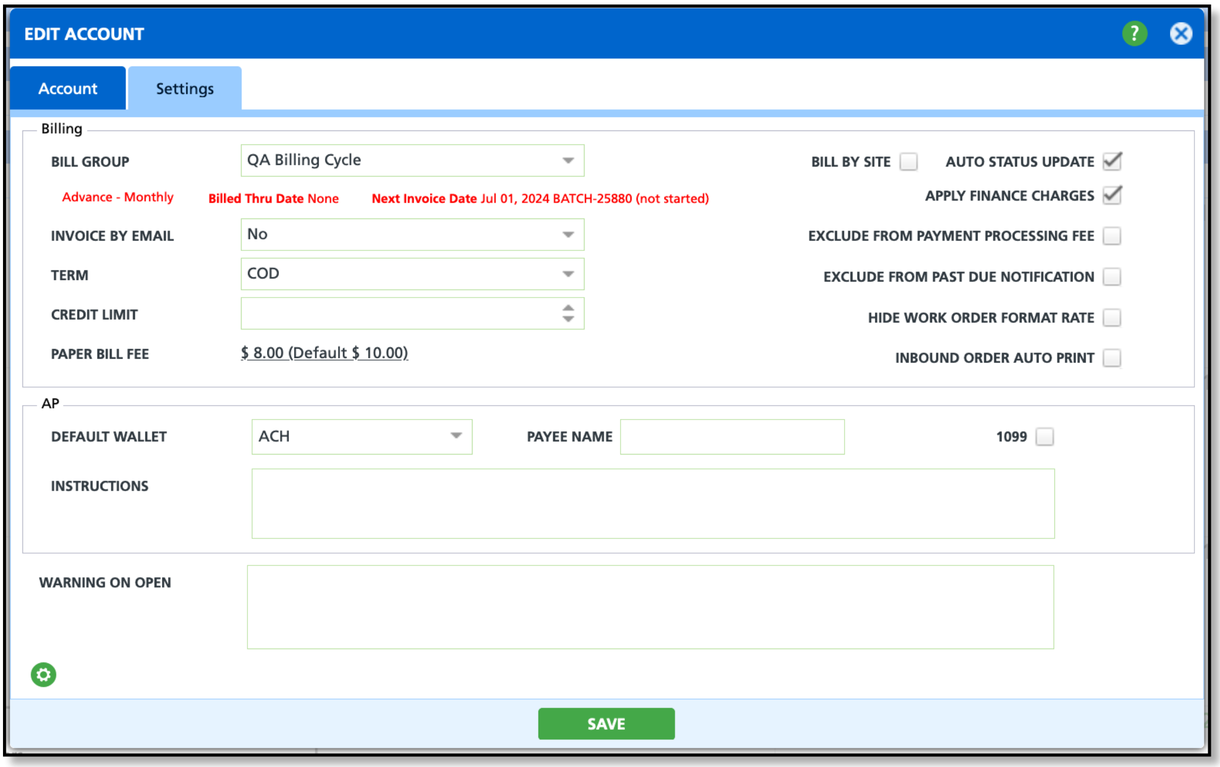
Field Descriptions

Field	Description
Contact Information (Name, Address, Phone)	The contact information for the account.
Billing Phone	Designated contact phone number associated with a customer or account that is primarily used for billing-related communications and inquiries. **Field does not display if the Account Class 'Type' setting is 'Residential.'*

Field	Description
Fax	Number field to enter a number for a fax machine. **Field does not display if the Account Class 'Type' setting is 'Residential.'*
Billing Contact 1 and 2	Designates the preferred contact for billing-related inquiries. To appear in the dropdown list, an individual must first be added as a contact.
Parent Account	Entry field to identify a parent account. **Field does not display if the Account Class 'Type' setting is 'Residential.'*
Status	Displays the current status of the account. Select the drop down and follow the steps to assign a new status.
Division	The region the account belongs to. The division the account is assigned determines who handles the account in other areas such as Operations and Accounting.
Source	Indicates how the account originated and helps with future sales and marketing campaigns.
Account Manager	Identifies the person overseeing the account (possibly the salesperson) and is considered the account's point of contact for changes in service.
Account Class	Indicates if the account is Commercial, Residential, Municipal, Broker, etc.
Website	Option to link the account's website to the account's information. **Field does not display if the Account Class 'Type' setting is 'Residential.'*
Logo	Option to upload the account's logo. **Field does not display if the Account Class 'Type' setting is 'Residential.'*
Old ID	Option the enter the account's ID from its legacy system.

Edit Account: Settings

The Settings tab establishes the billing requirements for the account and sites belonging to it.



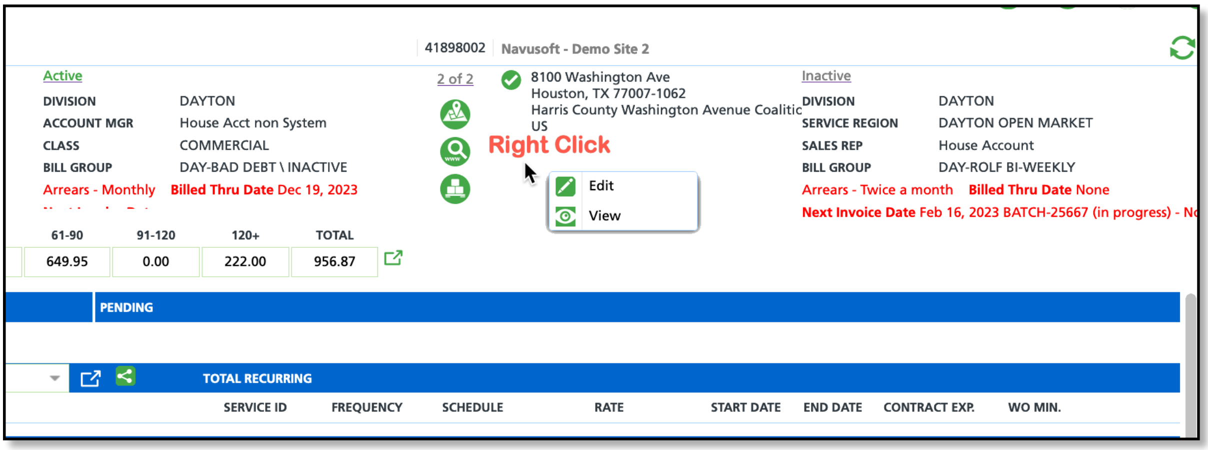
Field Descriptions

Field	Description
Bill Group	Division specific billing group the account is placed in.
Invoice By Email	This setting determines the method of invoice delivery: either as a PDF attachment or via email as a link. Choosing 'No' restricts the invoice to be printed and mailed as the only delivery option.
Term	Indicates the length of time the customer has to pay.
Credit Limit	Indicates the highest total outstanding balance the customer is allowed to accumulate without making further payments.
Paper Bill Fee	Displays if 'Invoice By Email' is disabled. Setup can be reviewed here: Paper Bill Fee Setup.
Bill By Site	Select the check box and one invoice will generate for each location. If unchecked, one invoice generates for all sites.
Auto Status Update	Check the box, and the account will adhere to the default settings, which determine when the account will be placed in a Credit Hold status based on the number of days past due and the amount past due.
Apply Finance Charges	Checking the box will cause the account to adhere to the default finance charge settings set by the Account Class.
Exclude from Payment Processing Fee	By checking the box, you ensure that no credit card fee will be charged to the account.
Exclude From Past Due Notification	Checking the box will prevent the account from receiving past-due notification letters.
Hide Work Order Format Rate	Check the box to hide rates on scale tickets or work orders that support rate printing.
Inbound Order Auto Print	Mark the checkbox to trigger the automatic display of the print window after marking an inbound ticket as complete.
AP (Accounts Payable)	
Default Payment Method	Specifies the preferred or default method that the account uses to receive payments.
Payee Name	Refers to the name of the individual or business entity to whom payments are made.
1099	If checked, signifies that payments made to this account may be subject to 1099 reporting.
Instructions	Option to provide supplemental instructions for an account's AP.
Other	
Warning on Open	Information entered here will be shown every time the account is accessed.

Account Custom Settings Properties (gear icon)	Option to add custom settings at the account level.

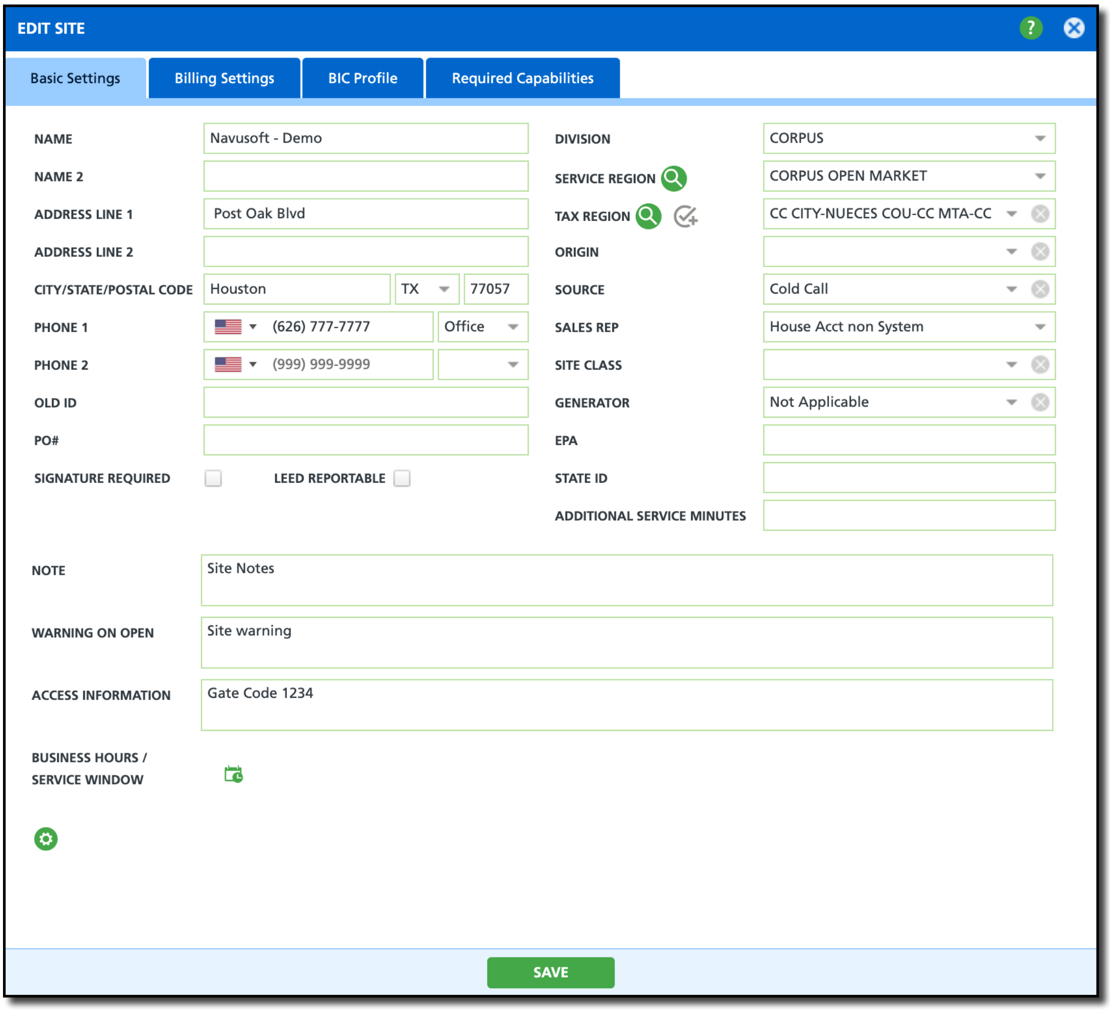
Edit Site Details

Information located on the right side of the customer screen is information specific to the site currently being viewed. Right-click within the site area and select 'Edit' to open the Edit Site popup editor.



Edit Site : Basic Settings

The Basic Settings tab includes vital site details like address, site name, notes, and other essential information for accounting and operational purposes.



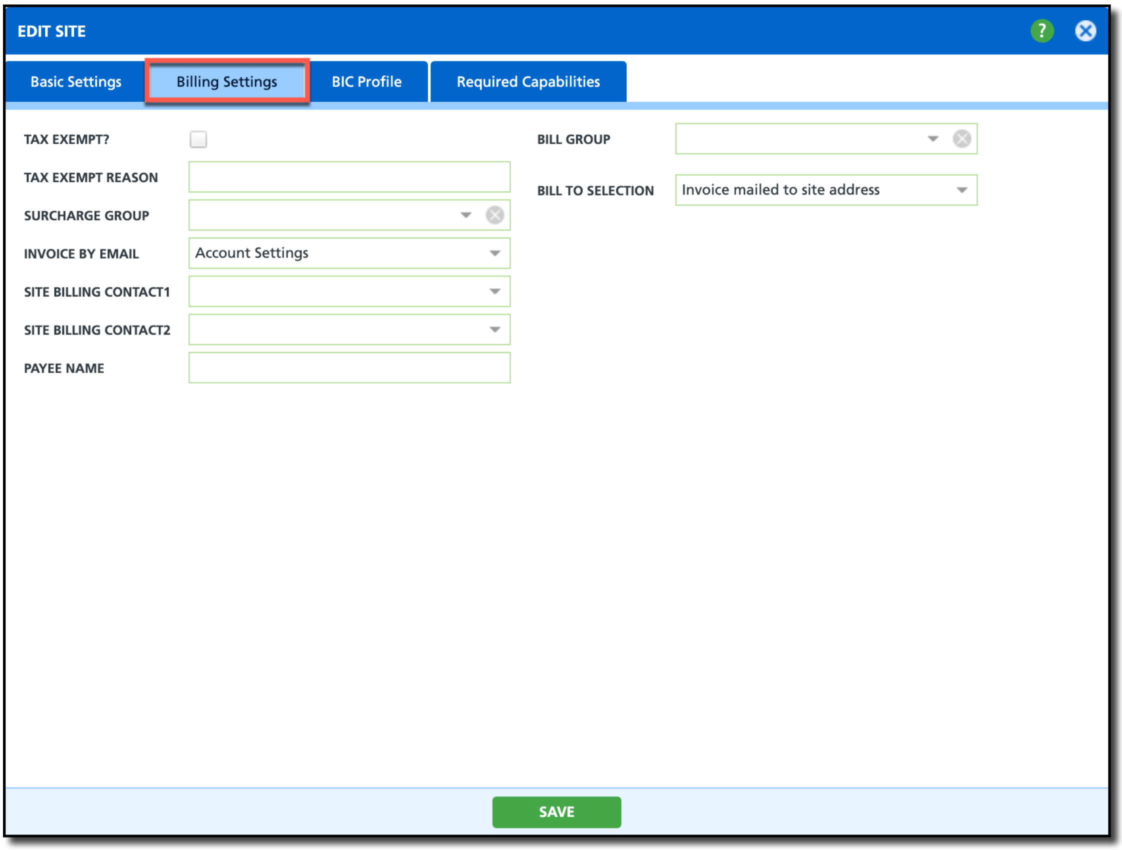
Field Descriptions

Field	Description
Contact/Location Information (Name, Address, Phone)	Contact and location information for the site.
Signature Required	If selected, the driver will be required to collect a signature each time they service the location.
Old ID	The old identification number of the site from its legacy system.
PO #	The post office box number for the site.
Signature Required	If selected, the driver will be required to collect a signature each time they service the location.
Service Region	Identifies the region the site belongs to.
Tax Region	Identifies the tax region the site belongs to.
Note	Displays in the site details section when viewing the Customer screen.
Warning on Open	Displays as a site-specific pop-up warning anytime the site is accessed.
Access Information	Used for conveying information the driver will need to access a location. Displays in the driver app on the service record.
Business Hours / Service Window	Identifies the hours of business for the site.
Division	Identifies the Division the site is in.
Service Region	Identifies the Service Region the site services.
Tax Region	Identifies the Tax Region that the site is in.
Origin	The origin location of the site.
Source	The source used to acquire the site.
Sales Rep	The Sales Rep that acquired the sites business.
Site Class	The Site Class the site is included in.
Generator	The amount of waste expected to be generated by this site.
EPA	The EPA ID for the site location.
State ID	The State ID for the site location.

Field	Description
Additional Service Minutes	Expected additional service minutes needed to complete services for this site.

Edit Site: Billing Settings

The Billing Settings tab establishes the billing requirements for the site, including the receipt method for invoices and the designated billing contact.



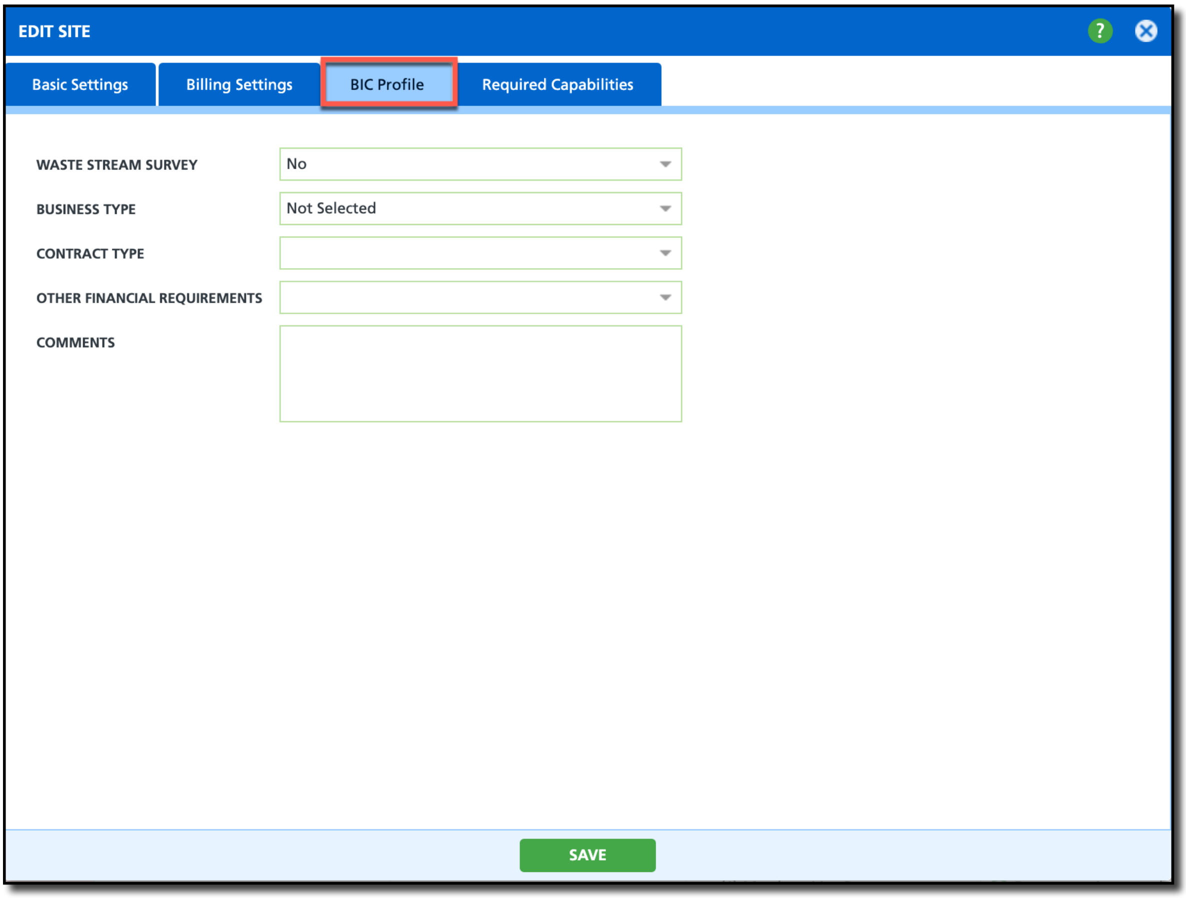
Field Descriptions

Field	Description
Tax Exempt	If the site **is** tax exempt and no tax region was selected when the account was created, select the **Tax Exempt** check box.
Tax Exempt Reason	If the Tax Exempt box is checked, provide supporting information explaining the reason for the site's tax exemption.
Surcharge Group	Select a Surcharge Group if the location is subject to a surcharge.
Invoice By Email	If the location is receiving invoices by email, select: • **Account Settings** and the location will follow what was previously set up for the account. • **Email With Link** and the location will receive a URL link to open the invoice. • **Email With PDF Attachment** and the invoice will be attached to the email as a PDF.

Field	Description
Site Billing Contact 1 & 2	Choose the name of the Site Billing Contact if this contact differs from the account contact. Contacts can only be assigned here, and to create a new contact, you must use the Contacts tool.
Payee Name	The name of the person or company who will be receiving the payment.
Bill Group	The Bill Group the site is included in.
Bill To Selection	Identifies the address invoices will be billed to.

Edit Site: BIC Profile

The BIC Profile tab pertains to commercial establishments in New York mandated by law to arrange for the collection of their putrescible waste and recyclables through a hauler licensed by the Business Integrity Commission (BIC).



Field Descriptions

Field	Description
Waste Stream Survey	Indicates if a waste stream survey was completed for the site.
Business Type	Specifies the business categorization used to identify the type of waste generated by the establishment.

Contract Type	Indicates if the contract between the customer and hauler was written or oral.
Other Financial Requirements	Indicates if the site has other financial requirements.
Comments	Option to provide addition comments regarding the site's BIC profile.

Edit Site: Required Capabilities

The Required Capabilities tab allows for a Site capability to be added and removed. The capabilities listed are custom preset within *Setup > System > Capabilities.*