

Add a New Account (Active)

Last Modified on 01/05/2024 3:48 pm EST

Pathway: [Customer > Add Account](#)



Before adding a new account, consider searching for the account to verify one hasn't already been created. Otherwise, upon selecting 'Create Account' the system will check for duplicates.

In the Add Account editor, accounts can be added either as an Active account or a Prospect account. This illustrates the process of creating an Active account for new customers. Review each section and minimally complete all required fields highlighted in red.

Permissions:

The following permissions are required to create and edit accounts and sites.

Permission ID	Permission Name
60	Create Account
66	Create Active Account
67	Create Active Site
68	Edit Non-prospect Account
69	Edit Non-Prospect Site

Create Account

Account Identification

The following section applies to the drop down fields located at the very top of the Create Account screen.

CREATE ACCOUNT ACCOUNTS > ADD ACCOUNT

STATUS: Active SOURCE: ACCOUNT DIVISION: SITE DIVISION: ACCOUNT CLASS:

Service Address: NAME, ADDRESS LINE 1 (Enter a location), ADDRESS LINE 2, CITY/STATE/POSTAL CODE, PHONE ((999) 999-9999), WEBSITE, PO#, EPA, SIGNATURE REQUIRED (checkbox).

Billing Address: Same as service address. NAME, ADDRESS LINE 1 (Enter a location), ADDRESS LINE 2, CITY/STATE/POSTAL CODE, PHONE ((999) 999-9999).

1. Select *Active* from the **Status** drop down.
2. Select the **Source** of how the account was acquired.
3. Select the **Account Division**.
4. Select the **Site Division**.
5. Select the **Account Class**.

Service and Billing Addresses

The following section details what fields must be completed in the Service Address and Billing Address sections.

CREATE ACCOUNT ACCOUNTS > ADD ACCOUNT

STATUS: Active SOURCE: ACCOUNT DIVISION: SITE DIVISION: ACCOUNT CLASS:

Service Address: NAME, ADDRESS LINE 1 (Enter a location), ADDRESS LINE 2, CITY/STATE/POSTAL CODE, PHONE ((999) 999-9999), WEBSITE, PO#, EPA, SIGNATURE REQUIRED (checkbox).

Billing Address: Same as service address. NAME, ADDRESS LINE 1 (Enter a location), ADDRESS LINE 2, CITY/STATE/POSTAL CODE, PHONE ((999) 999-9999).

CONTACT NAME, CONTACT PHONE ((999) 999-9999), TITLE, PHONE TYPE, CONTACT EMAIL, BILLING CONTACT (checkbox).

Service Address:

1. Enter a **Name** for the account.
2. Enter the address for the service location in **Address Line 1**. As you enter the address, the system will auto-suggest addresses based on what has been entered. Selecting from what is suggested will auto-fill additional address fields.
3. Enter the **City/State/Postal Code**.
4. Enter a **phone** number for the location.
5. If a website is provided you may enter that in the Website field.
6. Select **Signature Required** if the driver must always get a signature.

Billing Address:

1. If the billing address is the same as the service address, leave the **Same as Service Address** box checked. Otherwise, uncheck and continue to step 2.
2. Enter the **Name** the billing should be addressed to. As you enter the address, the system will auto-suggest addresses based on what has been entered. Selecting from what is suggested will auto-fill additional address fields.
3. Enter who the mailing should be **ATTN** to.
4. Enter the mailing address in **Address Line 1**.
5. Enter a phone number if different than the phone number for the service location.

Contact Information

The Contact section on the Create Account screen identifies the account contact and allows the user to also designate them as a billing contact. Additional contacts can be added to the account once the account has been created.

The screenshot displays the 'CREATE ACCOUNT' form with the following sections:

- Account Settings:** STATUS (Active), SOURCE, ACCOUNT DIVISION, SITE DIVISION, ACCOUNT CLASS.
- Service Address:** NAME, NAME 2, ADDRESS LINE 1 (with placeholder 'Enter a location'), ADDRESS LINE 2, CITY/STATE/POSTAL CODE, PHONE ((999) 999-9999), WEBSITE, PO#, EPA, SIGNATURE REQUIRED (checkbox).
- Billing Address:** Same as service address, NAME, NAME 2, ATTN, ADDRESS LINE 1 (with placeholder 'Enter a location'), ADDRESS LINE 2, CITY/STATE/POSTAL CODE, PHONE ((999) 999-9999).
- Contact Information (highlighted with a red box):** CONTACT NAME, TITLE, CONTACT EMAIL, CONTACT PHONE ((999) 999-9999), PHONE TYPE, BILLING CONTACT (checkbox checked).
- Billing:** BILL GROUP, SURCHARGE GROUP, INVOICE BY EMAIL, AUTO STATUS UPDATE (checkbox checked), EXCLUDE FROM PAST DUE NOTIFICATION (checkbox), TERM, APPLY FINANCE CHARGES (checkbox checked), CREDIT LIMIT.
- AP:** DEFAULT PAYMENT METHOD (Not Applicable), PAYEE, 1099 (checkbox).

1. Enter **Name** of the account contact.
2. Enter the **Title** or role of the contact (*optional*).
3. Enter the **Contact Email**. This is required if the account will be emailed invoices.
4. Enter the **Contact Phone** number and **Phone Type**.
5. Remove selection from **Billing Contact** only if this person IS NOT a billing contact.

Billing Information

The Billing section on the Create Account screen is responsible for configuring the account's billing settings and specifying preferences for invoice notifications. After an account is created, billing information can be updated on the customer service screen by right-clicking within the account details section and selecting "Edit."

CONTACT NAME	<input type="text"/>	TITLE	<input type="text"/>	CONTACT EMAIL	<input type="text"/>
CONTACT PHONE	<input type="text" value="(999) 999-9999"/>	PHONE TYPE	<input type="text"/>	BILLING CONTACT	<input checked="" type="checkbox"/>
Billing					
BILL GROUP	<input type="text"/>	SURCHARGE GROUP	<input type="text"/>	AP	<input type="text"/>
INVOICE BY EMAIL	<input type="text"/>	AUTO STATUS UPDATE	<input checked="" type="checkbox"/>	EXCLUDE FROM PAST DUE	<input type="checkbox"/>
TERM	<input type="text"/>	APPLY FINANCE CHARGES	<input checked="" type="checkbox"/>	NOTIFICATION	
CREDIT LIMIT	<input type="text"/>			PAYEE	<input type="text"/>
				1099	<input type="checkbox"/>
SALES REP	<input type="text"/>	SITE CLASS	<input type="text"/>	SERVICE REGION	<input type="text"/>
				TAX REGION	<input type="text"/>
				ORIGIN	<input type="text"/>

1. Select a **Bill Group** from the drop down list. Options populate based on the selected Account Division.
2. Select from the **Invoice By Email** options. If 'NO' is selected all invoices will be mailed.
3. Select a **Term** for when payments are due upon receipt of the invoice.
4. Select a **Surcharge Group** if one applies.
5. Select **Auto Status Update** if the account's status should automatically update to inactive due to credit holds or inactivity of services.
6. Select **Apply Finance Charge** if the account should be subject to late fees.
7. Select **Exclude From Past Due Notifications** if you do not want to send a past due notification to this account/customer.

Sales/Regional Information

The sales and regional information section identifies the account's sales representative and gathers geographic region details for tax calculations and applicable surcharges.

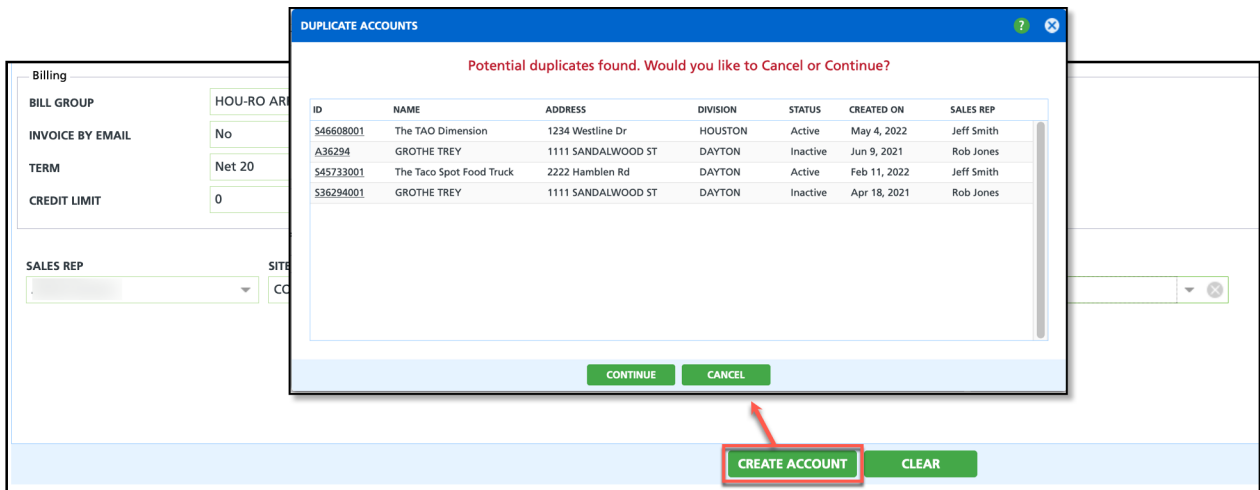
CONTACT NAME	<input type="text"/>	TITLE	<input type="text"/>	CONTACT EMAIL	<input type="text"/>
CONTACT PHONE	<input type="text" value="(999) 999-9999"/>	PHONE TYPE	<input type="text"/>	BILLING CONTACT	<input checked="" type="checkbox"/>
Billing					
BILL GROUP	<input type="text"/>	SURCHARGE GROUP	<input type="text"/>	AP	<input type="text"/>
INVOICE BY EMAIL	<input type="text"/>	AUTO STATUS UPDATE	<input checked="" type="checkbox"/>	EXCLUDE FROM PAST DUE	<input type="checkbox"/>
TERM	<input type="text"/>	APPLY FINANCE CHARGES	<input checked="" type="checkbox"/>	NOTIFICATION	
CREDIT LIMIT	<input type="text"/>			PAYEE	<input type="text"/>
				1099	<input type="checkbox"/>
SALES REP	<input type="text"/>	SITE CLASS	<input type="text"/>	SERVICE REGION	<input type="text"/>
				TAX REGION	<input type="text"/>
				ORIGIN	<input type="text"/>

1. Select the **Sales Rep** who is assigned to the account for future handlings.
2. Select the **Site Class** if one applies.
3. Select the **Service Region**.
4. Select the **Tax Region**. If no region is selected the customer is considered tax exempt.

Create Account & Check For Duplicates

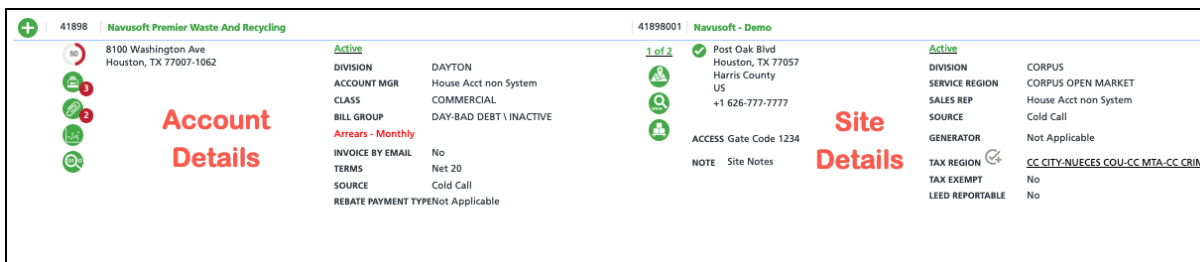
Upon selecting **Create Account**, the system will check for any duplicates. Review the list of returned results to verify a duplicate does not exist before proceeding any further.

- **Duplicate Found:** If you identify a duplicate upon reviewing the results, choose the duplicate from the list, and you will be directed to the customer service screen of the selected account. This step ensures that a new account is not created.
- **No Duplicate:** If upon reviewing the results a duplicate is not found, select the "Continue" button and the account will be created.



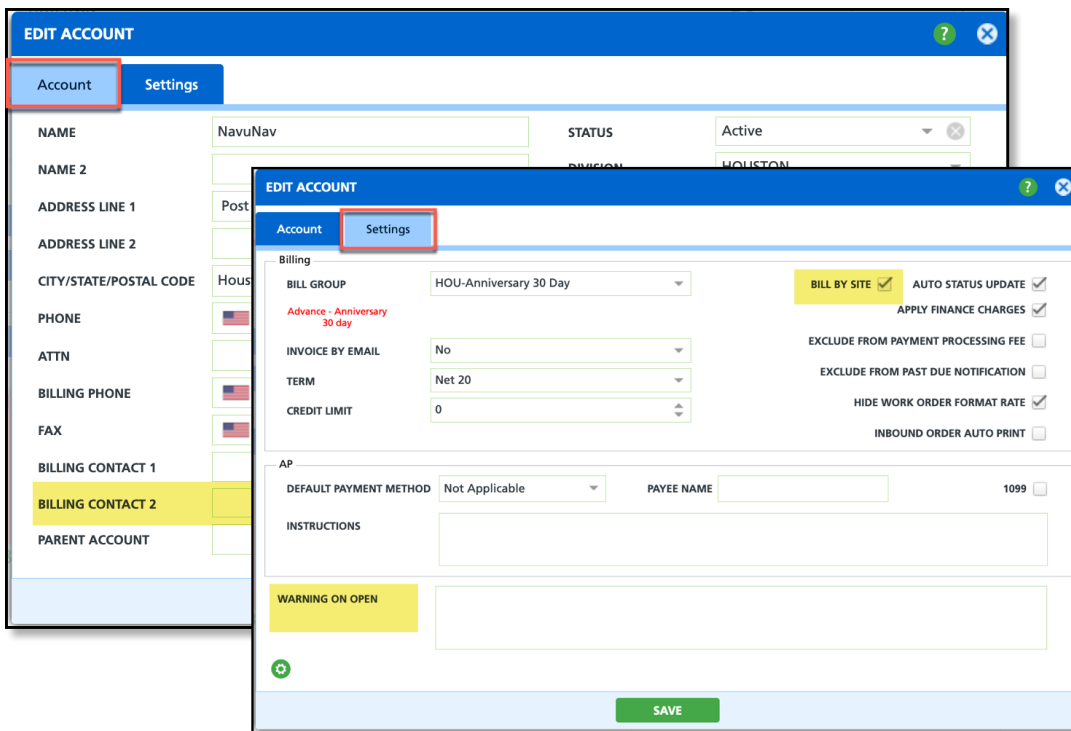
Review Additional Setup

After an account has been created, additional setup may be required. Review the Edit Account and Edit Site screens to add any additional information. Fields in here are found by double-clicking within Account Details and Site Details sections.



Edit Account

Open the Edit Account screen by double-clicking within the left side of Account Details.



Account Tab

- **Billing Contact 2-** If there is a need to designate a secondary billing contact, it can be chosen here. Names of contacts only display in the drop down if they have been previously added to the account. That process can be reviewed here: [Add Contact](#).

Settings Tab

- **Bill By Site:** Considering checking this is multiple sites exist for an account and it will send one invoice per site.
- **Warning On Open:** If a popup warning/message should display upon opening the account, enter that here. This will display for anyone with who views the account.

Edit Site

Open the Edit Site screen by double-clicking within the Site Details section of the screen.

The image shows two overlapping screenshots of the 'EDIT SITE' application. The top screenshot shows the 'Basic Settings' tab, which includes fields for Name (NavuNav), Division (HOUSTON), Service Region (HOUSTON OPEN MARKET), Address Line 1 (1700 Post Oak Blvd), City/State/Postal Code (Houston), Phone 1 and 2, Old ID, PO#, Signature Required, and Note. The bottom screenshot shows the 'Billing Settings' tab, which includes fields for Tax Exempt?, Tax Exempt Reason, Surcharge Group, Invoice by Email (Account Settings), Site Billing Contact 1 and 2, and Payee Name. A 'SAVE' button is located at the bottom of the form in both screenshots.

Basic Settings Tab

- **Note:** Option to add any internal notes regarding the site. Notes added here are not visible to drivers or customers.
- **Warning On Open:** Option to add a warning note users will see when opening the site.
- **Access Information:** Enter a note for the driver to see when servicing the site.

Billing Settings (tab)

- **Tax Exempt:** Select the check box if the site is tax exempt and no tax region was selected when the site was added.
- **Site Billing Contact (1 and 2):** Identify up to two billing contacts for the site if the contact is different than the account contact. Contacts are only assigned here, not created. To create a contact, review: [Add Contact](#).

Related Articles:

[Create Account: Screen Field Descriptions](#)
[Add Contact](#)