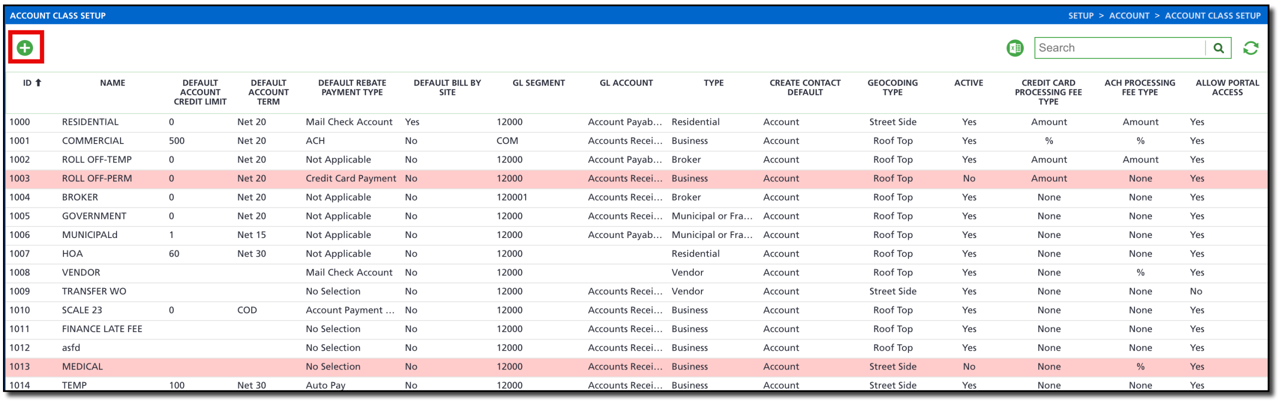
Account Class Setup

Last Modified on 04/13/2026 11:02 am PDT

Pathway: *Setup > Account > Account Class*

Account Class defines the billing and payment processing criteria for an account or group of accounts. It is assigned upon account creation and also serves as a filter for various reports and tools within the application.

Select the **green plus +** icon to **add** a new account class, or double click on an existing one to **edit** a current setup.



ACCOUNT CLASS SETUP

SETUP > ACCOUNT > ACCOUNT CLASS SETUP

Search

ID	NAME	DEFAULT ACCOUNT CREDIT LIMIT	DEFAULT ACCOUNT TERM	DEFAULT REBATE PAYMENT TYPE	DEFAULT BILL BY SITE	GL SEGMENT	GL ACCOUNT	TYPE	CREATE CONTACT DEFAULT	GEOCODING TYPE	ACTIVE	CREDIT CARD PROCESSING FEE TYPE	ACH PROCESSING FEE TYPE	ALLOW PORTAL ACCESS
1000	RESIDENTIAL	0	Net 20	Mail Check Account	Yes	12000	Account Payab...	Residential	Account	Street Side	Yes	Amount	Amount	Yes
1001	COMMERCIAL	500	Net 20	ACH	No	COM	Accounts Recei...	Business	Account	Roof Top	Yes	%	%	Yes
1002	ROLL OFF-TEMP	0	Net 20	Not Applicable	No	12000	Account Payab...	Broker	Account	Roof Top	Yes	Amount	Amount	Yes
1003	ROLL OFF-PERM	0	Net 20	Credit Card Payment	No	12000	Accounts Recei...	Business	Account	Roof Top	No	Amount	None	Yes
1004	BROKER	0	Net 20	Not Applicable	No	120001	Accounts Recei...	Broker	Account	Roof Top	Yes	None	None	Yes
1005	GOVERNMENT	0	Net 20	Not Applicable	No	12000	Accounts Recei...	Municipal or Fra...	Account	Roof Top	Yes	None	None	Yes
1006	MUNICIPALd	1	Net 15	Not Applicable	No	12000	Account Payab...	Municipal or Fra...	Account	Roof Top	Yes	None	None	Yes
1007	HOA	60	Net 30	Not Applicable	No	12000		Residential	Account	Roof Top	Yes	None	None	Yes
1008	VENDOR			Mail Check Account	No	12000		Vendor	Account	Roof Top	Yes	None	%	Yes
1009	TRANSFER WO			No Selection	No	12000	Accounts Recei...	Vendor	Account	Street Side	Yes	None	None	No
1010	SCALE 23	0	COD	Account Payment ...	No	12000	Accounts Recei...	Business	Account	Roof Top	Yes	None	None	Yes
1011	FINANCE LATE FEE			No Selection	No	12000	Accounts Recei...	Business	Account	Roof Top	Yes	None	None	Yes
1012	asfd			No Selection	No	12000	Accounts Recei...	Business	Account	Roof Top	Yes	None	None	Yes
1013	MEDICAL			No Selection	No	12000	Accounts Recei...	Business	Account	Street Side	No	None	%	Yes
1014	TEMP	100	Net 30	Auto Pay	No	12000	Accounts Recei...	Business	Account	Street Side	Yes	None	None	Yes

Permission

The following permissions are required to view and edit Account Class Setup:

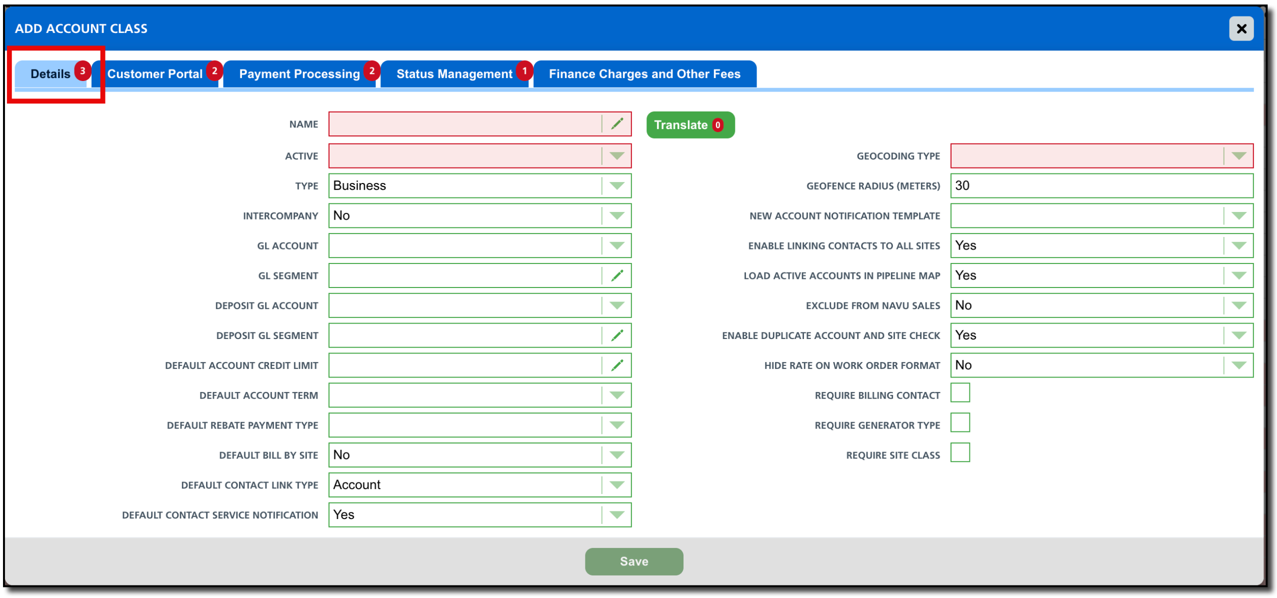
Permission ID	Permission Name
23	Setup \ Account

Add Account Class

The **Add Account Class** page allows users to create a new Account Class using a five-tab interface. Each tab features a **red tick mark** displaying the number of fields within each tab that needs to be completed before saving. While several fields include default values to speed up entry, these remain fully editable to accommodate your specific requirements. In addition, fields that are mandatory are highlighted in red.

Details Tab

The following section reviews the fields in the **Details** tab.



Field Descriptions: Details

Fields	Descriptions
Name *(Required)*	The name of the Account Class.
Active *(Required)*	Controls if the account class is available for use. • Yes - Available • No - Not Available
Type	Indicates the business Type the account class falls under. • Business and Residential note: When this field is set to either *Business* or *Residential*, the Site Class field is displayed on the Basic Settings tab of the Edit Site screen.
GL Account	Identifies which GL segment the account class is available to. Refer to the GL Segmentation article for further information.
GL Segment	The GL Segmentation for the GL Account.
Deposit GL Account	Identifies the Deposit GL Account used for accounts belonging to the account class.
Deposit GL Segment	Identifies the GL Segment used for accounts belonging to the account class.
Default Account Credit Limit	The credit limit sets the threshold at which the hauler contacts the customer for payment or suspends service until the balance falls below the limit. The billing screen provides alerts when a customer exceeds their credit limit during the billing process.
Default Account Term	Identifies the default Term accounts assigned to the account class will follow for billing. *Term: The length of time a payor (customer) has after the invoice date to pay the amount due.*

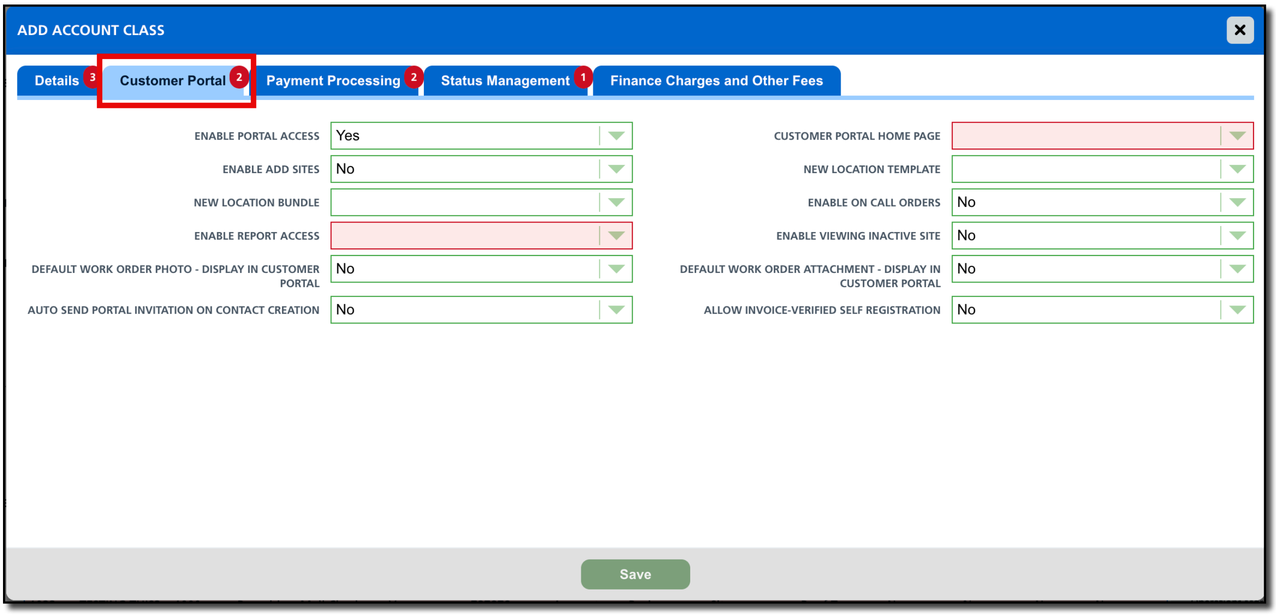
Default Rebate Payment Type	Identifies the default payment type used by the account class for rebate payments.
Default Bill By Site	Default setting for the 'Bill Per Site' field in the Add or Edit Account editor for accounts assigned to the account class. • Yes - Checks the 'Bill By Site' check box in the *Add or Edit Account* editor. • No - Removes the selection from the 'Bill By Site' check box in the *Add or Edit Account* editor.
Default Contact Link Type	Defaults the contact to either account level or site level when a contact is added.
Default Contact Service Notification	If set to *Yes*, when a new contact is added to an account or site, the *Receive Service Notifications* field in the Add Contact screen will default to *Yes* for that contact.
Geocoding Type *(Required)*	Determines placement of the pin when site locations are displayed on a map. Options include Roof Top or Street Side.
Geofence Radius (Meters)	Creates a virtual perimeter around the location's address to indicate proximity of the truck to the service location. This can be overridden at the Site Class level. **NOTE:** Setting the radius too low (e.g., 1 meter) can interfere with Residential Mode in NavuNav. Lowest recommended setting is 20 meters.
New Account Notification Template	Template that is used for new accounts. Notifications are sent based on the account contact's notification preferences.
Enable Linking Contacts to All Sites	Enables linking contacts to all sites belonging to an account. • Yes - Enabled • No - Disabled
Load Active Accounts In Pipeline Map	Option to display active accounts on the Pipeline Map (Sales > Pipelines > Pipeline Summary). • Yes - Accounts display • No - Accounts do not display
Exclude from NavuSales	If enabled, prevents sync to the iPad.
Enable Duplicate Account and Site	If enabled, the system will check for a duplicate accounts/sites when a new account/site is created. The default setting for this field is 'Yes'.
Hide Rate On Work Order Format	If selected, rates will be hidden from view on scale tickets or work orders that support printing rates. This setting also exists at the account level.
Require Billing Contact	If checked, a billing contact is required when creating an account, and the Contact Name, Contact Email, and Contact Phone fields become required.
Require Generator Type	If checked, setting requires accounts to identify the Generator Type. **Applies to account classes dealing with Hazardous or Medical Waste.*
Require Site Class	If checked, a site class must be selected when creating a new account or a site.

Details Setup

1. Complete the following required fields:
   - Enter a **Name** for the Account Class.
   - Select 'Yes' from the **Active** field to activate the account class.
   - Select the preferred **Geocoding Type.**
   - Select 'Yes' from **Require Generator Type** if the account class deals with Hazardous or Medical Waste. Otherwise, select 'No'.
   - Select 'Yes' to **EnableAutomatic Status Updates** and update the status of the account between the active and credit hold statuses. Otherwise, select 'No.'
   - Select 'Yes' from **Auto Credit Hold Placement** if the status of an account belonging to the account class should be updated to 'Credit Hold' if the account is past due.
   - Select 'Yes' from **Auto Credit Hold Removal** if the status of an account belonging to the account class should be updated to 'Active' once a past due payment has been received.
   - Select the **Status Update Time** for accounts to be placed on or removed from credit hold status.
2. Complete additional fields based on your company's setup requirements.
3. Click **Save** when finished.

Customer Portal Tab

This section outlines the fields in the **Customer Portal** tab that are essential for the Customer Portal setup. For additional setup details, see Customer Portal Setup documentation.



Field Descriptions: Customer Portal

Fields	Descriptions
Enable Portal Access	Enables Customer Portal access to users of accounts assigned the account class.
Customer Portal Home Page *(Required)*	The Home Page users see upon logging in to their Customer Portal account.

Enable Add Sites	Select 'Yes' to enables the ability for users to add new service locations from their portal account.
New Location Template	When 'Enable Add Sites' field is set to 'Yes', select the template the Customer Portal will follow when a new site is added.
New Location Bundle	Default setting for self service ordering. More details to come.
Enable On Call Orders	Select 'Yes' to enable the option to create On Call Orders from the Customer Portal. Review the **Online Order Default Status** field in Setup > Services > Line of Business > Mobile/Optimization/Online Order (tab) to indicate how online orders are processed once received. • *Pending Approval* - On call order will be placed in a pending status for review in the Operations > Route Management > Pending tab. • *Scheduled* - On call order will be automatically scheduled on a route in Dispatch.
Enable Report Access *Required*	Select 'Yes' to enable the ability for Customer Portal users to run reports.
Enable Viewing Inactive Site	Grants users of an inactive site access to view service history information, associated photos, manifests, and report attachments. Other options, such as the ability to create a request or view AR information, are hidden if the site is inactive.
Default Work Order Photo - Display In Customer Portal	Controls if a photo should display in the Customer Portal.
Default Work Order Attachment - Display In Customer Portal	Controls if an attachment should display in the Customer Portal.
Auto Send Portal Invitation on Contact Creation	When enabled, and a new account is created with a contact that has an email address, a Customer Portal invitation is sent automatically.
Allow Invoice-Verified Self Registration	When enabled, customers can request a portal login invitation using a recent invoice, which must include the invoice number and either a quick pay code or an account number.

Customer Portal Setup

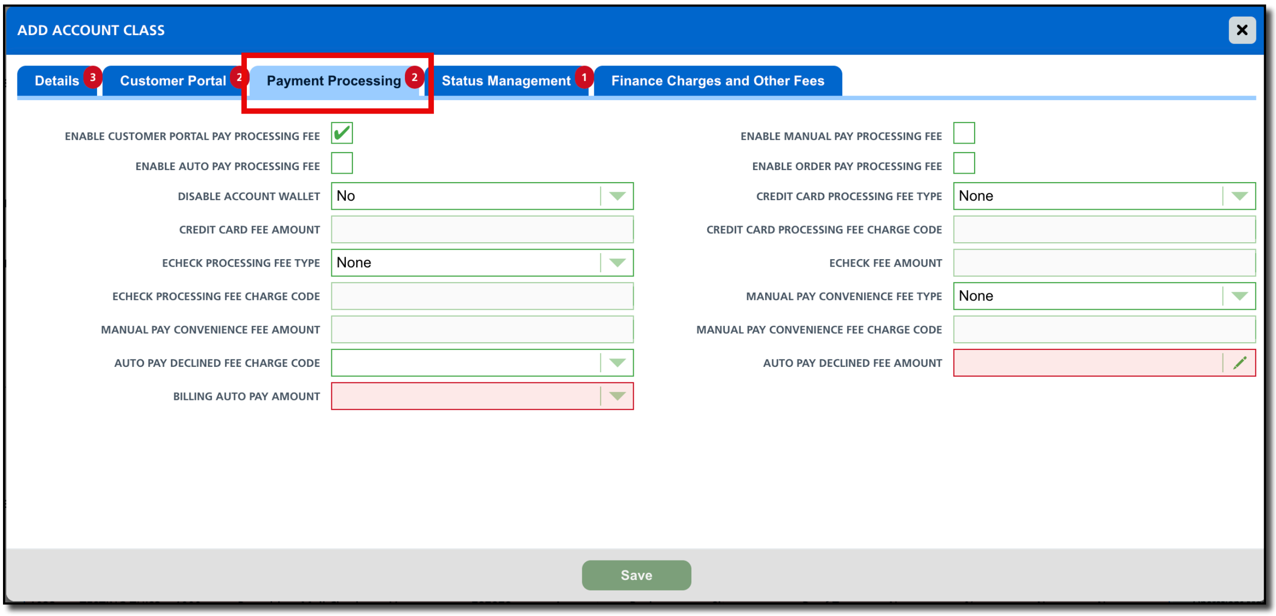
If setting up Customer Portal, review the full setup documentation here: Customer Portal Setup.

1. Select 'Yes' from **Enable Portal Access** to allow users of accounts belonging to the account class access to the portal.
2. Select the **Customer Portal Home Page** that will display for users in the account class.
3. Select 'Yes' from **Enable Report Access** if portal users should have access to reports in the account portal.
4. Select 'Yes' from **Default Work Order Photo - Display in Customer Portal** to display the photo taken by the driver for the service.
5. Complete additional fields based on your company's setup requirements.

6. Click **Save** when finished.

Payment Processing Tab

The following section details the fields in the Payment Processing tab.



Field Descriptions: Payment Processing

Field	Description
Enable Customer Portal Pay Processing Fee	Check the box to apply a processing fee for payments made through the portal.
Enable Manual Pay Processing Fee	Check the box to apply a processing fee for manual portal payments.
Enable Auto Pay Processing Fee	Check the box to apply a processing fee for auto pay payments.
Enable Order Pay Processing Fee	Check the box to apply a processing fee for Order Pay.
Disable Account Wallet	Enables saving credit card payment methods for future use in the **Payments** tab of a work order. • **Default setting: No** – A **Save for Reuse** checkbox appears in the **Add Payment** popup when adding a credit card payment to a work order. • **If set to Yes** – The **Save for Reuse** checkbox is hidden when adding a credit card payment, and the **Add** icon in **Accounts > AR History > Wallet** is also hidden.
Credit Card Processing Fee Type	Enables processing fees for credit card transactions and specifies the fee type to apply—Percentage or Amount. Select *None* if this does not apply.
Credit Card Fee Amount	Text entry field to enter the amount associated with the selected fee type.
Credit Card Processing Fee Charge Code	The specific charge code the credit card processing fee is billed under.

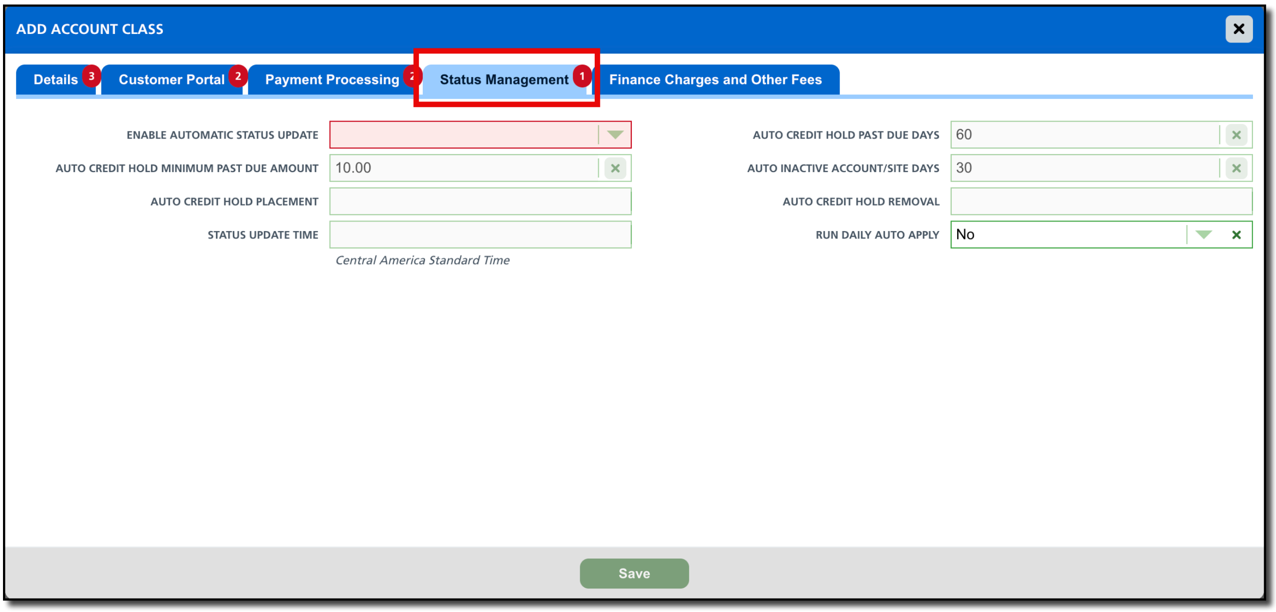
ECheck Processing Fee Type	Enables processing fees for eCheck transactions and specifies the fee type to apply—Percentage or Amount. Select *None* if this does not apply.
ECheck Fee Amount	Text entry field to enter the amount associated with the selected fee type.
ECheck Processing Fee Charge Code	The specific charge code the eCheck processing fee is billed under.
Manual Pay Convenience Fee Type	Enables convenience fees and specifies the fee type to apply—Percentage or Flat Amount. To disable convenience fees, leave this set to *None*. If convenience fee is enabled, an *Apply Convenience Fee* checkbox is displayed and automatically checked on the **Post a Payment** screen in AR History.
Manual Pay Convenience Fee Amount	Text entry field to enter the amount associated with the selected fee type.
Manual Pay Convenience Fee Charge Code	The specific charge code the convenience fee is billed under.
Auto Pay Declined Fee Charge Code	Charge Code that displays for declined auto pay payments.
Auto Pay Declined Fee Amount *(Required)*	The fee amount that is automatically applied towards declined transactions.
Billing Auto Pay Amount *(Required)*	Indicates the auto pay amount that will be collected from the account when auto pay is run. • *Invoice Amount:* If selected, only the amount for the current invoice is collected. • *Balance Due:* If selected, all unpaid balances including the current invoice are collected.

Payment Processing Setup

1. Enter an **Auto Pay Declined Fee Amount** to be charged in the event a payment is declined. Enter '0' if a fee will not be charged.
2. Select the preferred **Billing Auto Pay Amount** to indicate how accounts under the account class are billed.
3. Complete additional fields based on your company's setup requirements.
4. Click **Save** when finished.

Status Management Tab

The Status Management tab contains settings for automating account status changes.



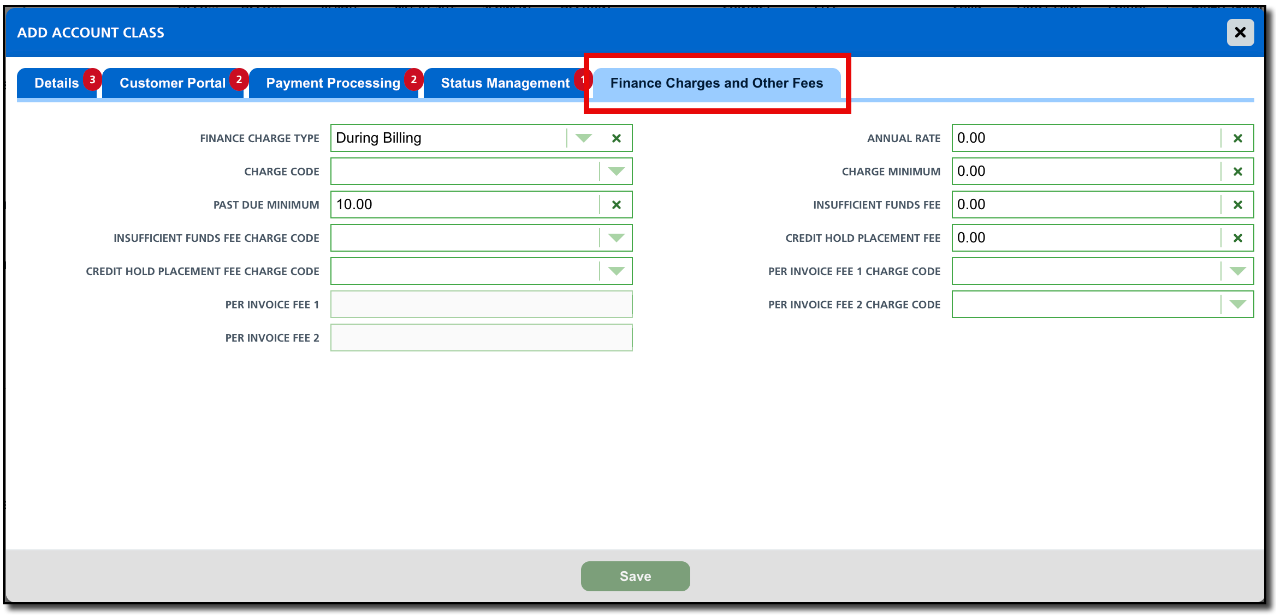
Field Descriptions: Status Management

Field	Description
Enable Automatic Status Update	Select 'Yes' to enable the system to automatically update an account's status. This setting applies to applying and removing an auto-credit hold as well as other automatic status updates.
Auto Credit Hold Past Due Days	The number of days a single invoice must be past due before an auto-credit hold is applied. An account requires just one past-due invoice for the credit hold to take effect. *'Auto Credit Hold Placement' must be enabled for settings here to apply.*
Auto Credit Hold Minimum Past Due Amount	The amount (in dollars) an account must be past-due before auto-credit hold is applied. *'Auto Credit Hold Placement' must be enabled for settings here to apply.*
Auto Inactive Account/Site Days	The number of days an account or site must remain inactive before it is automatically set to an inactive status. **Site logic used** • The site must have no active services associated with it. • Once the defined number of days has passed, the site will automatically be set to inactive. **Account logic used** • The account must have no active sites associated with it and a $0 AR balance. • Once the defined number of days has passed, the account will automatically be set to inactive. This value **must be greater than 0** for the process to automatically update statuses to inactive.
Auto Credit Hold Placement	Select 'Yes' to enable the system to place a past-due account on a credit hold. This field must be enabled for '*Auto Credit Hold Past Due Days*' and '*Auto Credit Hold Minimum Past Due Amount*'.
Auto Credit Hold Removal	Select 'Yes' to remove an account from a credit hold status after the past-due balance has been paid.

Status Update Time	The time the system will process status updates. It's recommended to schedule this during off-hours when system activity is low and to avoid disrupting operations.
Run Daily Auto Apply	Select 'Yes' to enable a daily check for unapplied payments and credits on an account and applies them to the account's oldest invoice balances first.

Finance Charges and Other Fees Tab

The Finance Charges/Late Fees tab establishes how charges and fees are applied to an account. To learn more, see the Finance Charge and Late Fee Setup documentation.



Field Descriptions: Finance Charges and Other Fees

Field	Description
Finance Charge Type	Establishes how a late fee will be applied on an account's invoice statement. Based on the selection that is made, functionality for other fields may change. • **During Billing:** The finance charge or late fee will be calculated during the billing process for a scheduled billing batch and included on the invoice. • **Manual Flat Fee:** A manual flat fee must be applied using the *Calculate Manual Finance Charges and Late Fees* tool in the Accounting module. • **One Time Fee Per Invoice:** A finance charge or late fee will be applied one time per invoice and is only calculated for Scheduled Batches.
Annual Rate/Rate	The Annual Rate applied to accounts belonging to the account class. Rate Application is dependent on the Finance Charge Type: • **During Billing:** Identified as a percentage of the past due amount. • **Manual Flat Fee:** This field does not apply to this option. • **One Time Fee Per Invoice:** Applied as a flat rate.

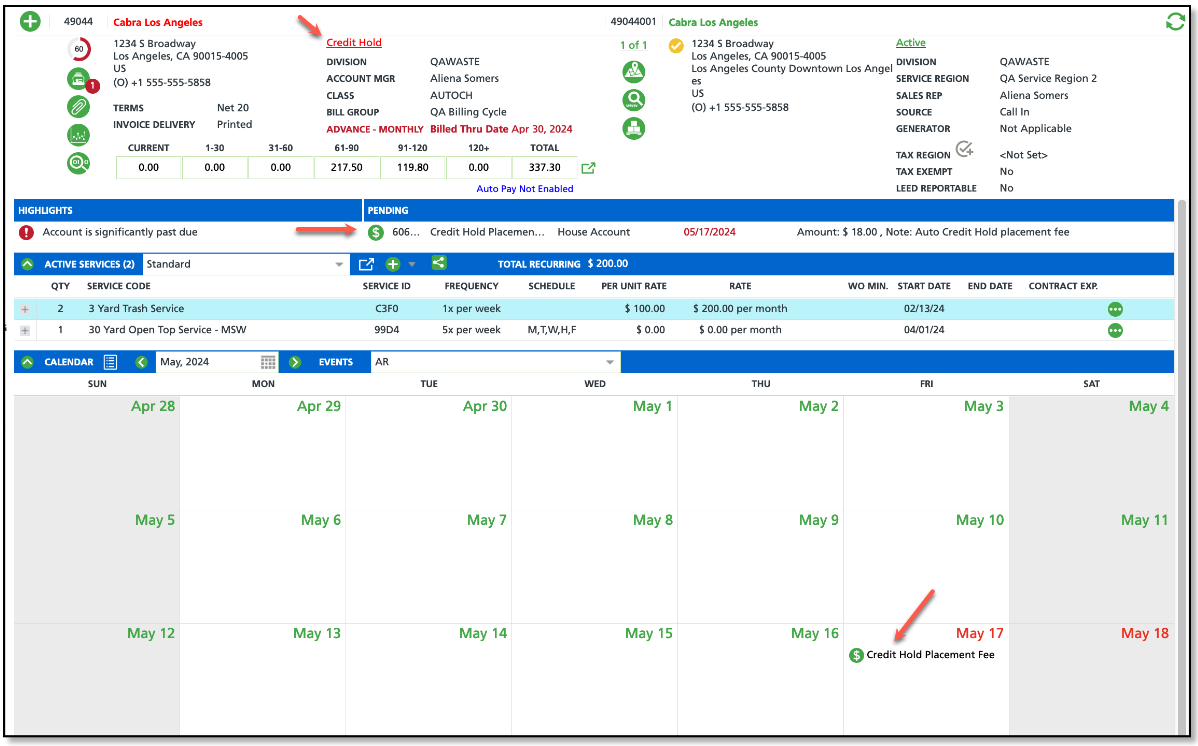
Charge Code	The charge code that billing will use for applying finance charges and late fees to an invoice.
Charge Minimum	The minimum dollar amount an account must be charged. If the percentage value entered in the 'Rate' field is less than the charge minimum, the charge minimum is applied.
Past Due Minimum	The minimum dollar amount an account must be past due for late fees to apply.
Insufficient Funds Fee	Fee that will be applied for insufficient funds. If a value greater than '0.00' is entered, the *Insufficient Funds Fee Charge Code* field is required.
Insufficient Funds Fee Charge Code	The charge code to be applied at billing when an insufficient fund fee is incurred.
Credit Hold Placement Fee	The amount that will be applied if an account is placed on a credit hold. If a value greater than '0.00' is entered, the *Credit Hold Placement Fee Charge Code* field is required.
Credit Hold Placement Fee Charge Code	The charge code that will be applied at billing when a credit hold placement fee is incurred.
Per Invoice Fee 1 Charge Code	The charge code for *Per Invoice Fee 1*, which will be printed on invoices. When a charge code is selected, the Per Invoice Fee 1 field is enabled.
Per Invoice Fee 1	Manual charge that gets added to invoices at billing. The amount entered here can be overridden at the account-level.
Per Invoice Fee 2 Charge Code	Identifies the charge code for Per Invoice Fee 2, which will be printed on invoices. When a charge code is selected, the Per Invoice Fee 2 field is enabled.
Per Invoice Fee 2	Manual charge that gets added to invoices at billing. The amount entered here can be overridden at the account-level.

Application of Credit Hold Placement Fee in Customer Service

(Only applies to automated credit holds)
Pathway: *Setup > Account > Account Class*

If an account qualifies for an automated credit hold, and the account class includes a credit hold placement fee and charge code, a manual charge will be created when the account is placed on "Credit Hold." For this, the following logic is used:

- Credit Hold Placement Fee must include a value be greater than '0'
- Credit Hold Placement Fee Charge Code must exist.
- The account class to which the account belongs must have the necessary auto credit hold settings enabled and defined in the Status Management tab.



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