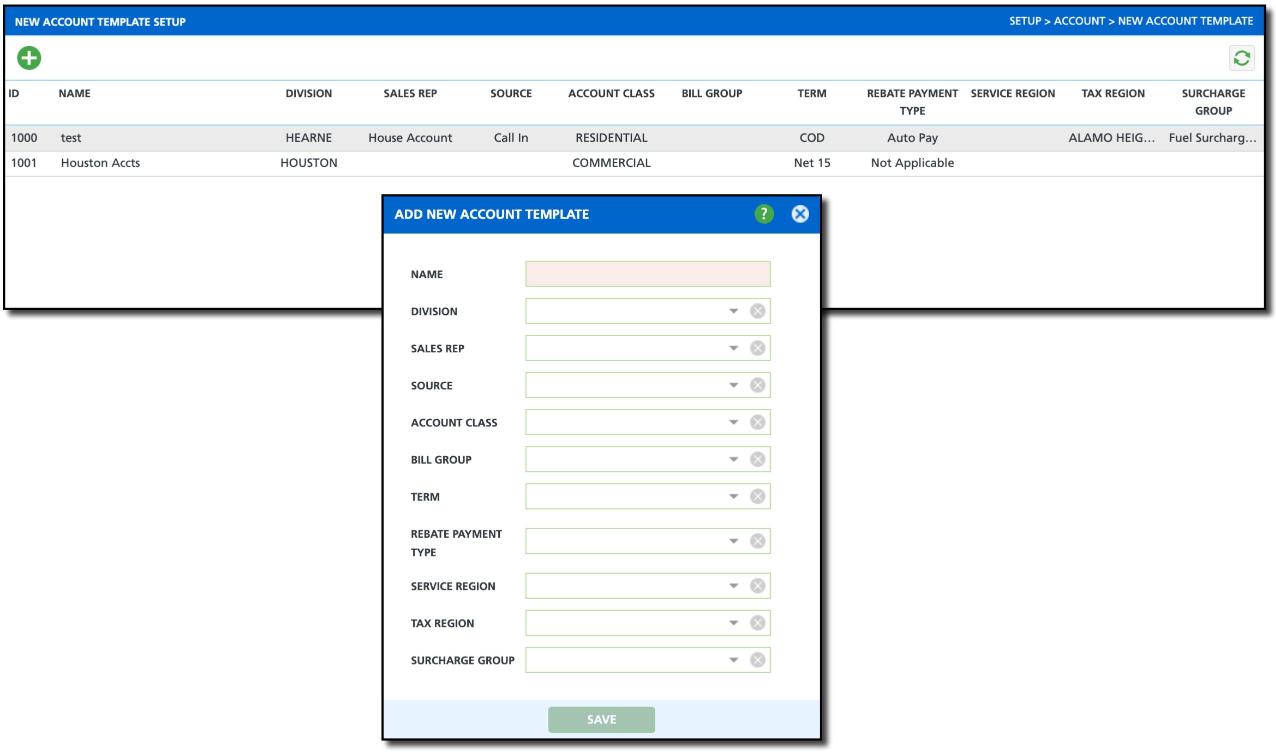
New Account Template Setup

Last Modified on 04/29/2024 7:34 am EDT

Pathway: *Setup > Account > New Account Template*

New Account Template Setup is used to help streamline the "Add Account" process with pre-configured field selections. This feature reduces the amount of manual entry, ensuring that the account setup process is expedited and consistent with the template's predefined values.



Permissions

The following permission is required to view, add and edit in the New Account Template Setup screen:

Permission ID	Permission Name
23	Setup \ Account

Field Descriptions

When a template is selected to create a new account from, fields populated in the template will auto-populate for the account.

Field	Description
Name	The name of the template that will display for selection.
Division	Indicates the division an account using this template belongs to.
Sales Rep	Identifies the sales representative for the account.

Source	Indicates the source of how an account the template applies to originated.
Account Class	Indicates the account class for accounts the template applies to.
Bill Group	Indicates the bill group for accounts the template applies to.
Term	Indicates the payment term period for accounts the template applies to.
Rebate Payment Type	Identifies the payment type for accounts the template applies to.
Service Region	Indicates the service region for accounts the template applies to.
Tax Region	Indicates the tax region for accounts the template applies to.
Surcharge Group	Identifies the surcharge group for accounts the template applies to.

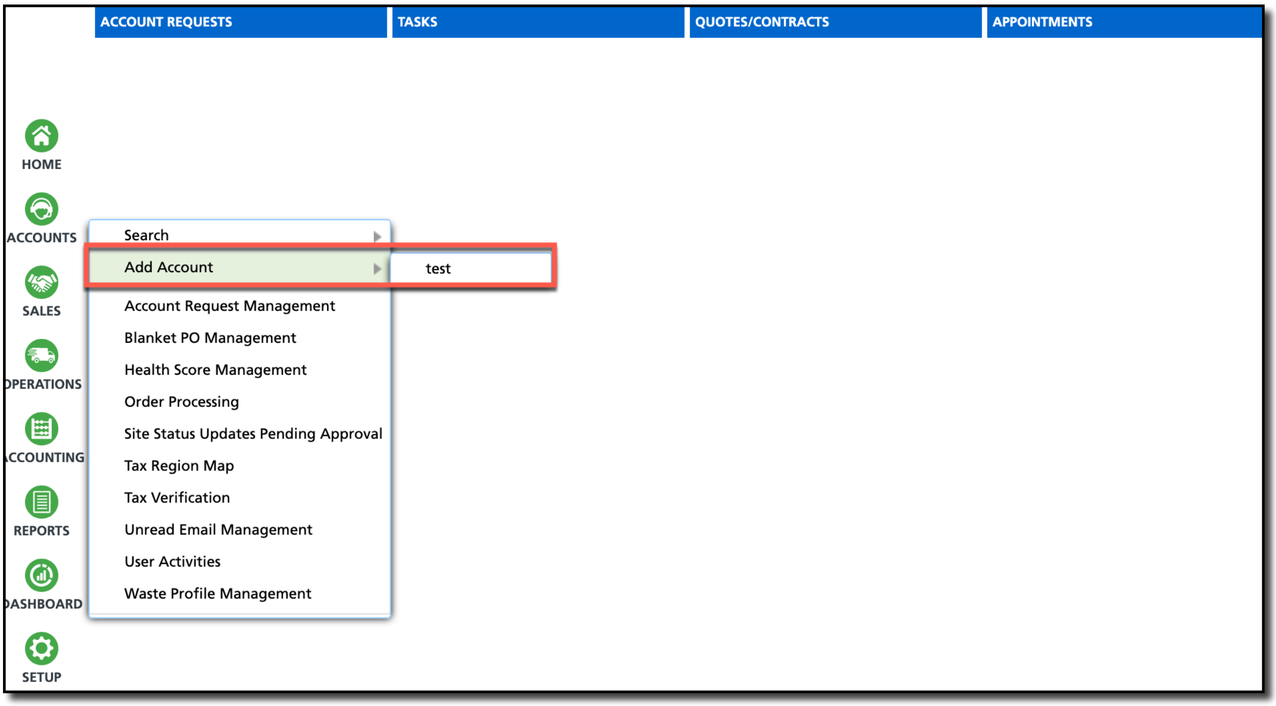
New Account Template Setup Steps

After a template is created, it is available for selection upon adding a new account. Templates can not be deleted on the front-end once created.

1. Click the **green +** icon to open the Add New Account Template editor.
2. Complete the following required fields:
    - Enter a **Name** for the New Account Template.
3. Complete additional fields based on the template's requirements.
4. Click **Save** when finished.

Assign a Template to a New Account

Account templates made in 'New Account Template' display for selection when adding a new account. Selecting a template option will automatically begin the 'Add Account' process with the preconfigured information.


ACCOUNT REQUESTS
TASKS
QUOTES/CONTRACTS
APPOINTMENTS
HOME
ACCOUNTS
SALES
OPERATIONS
ACCOUNTING
REPORTS
DASHBOARD
SETUP
Search
Add Account
test
Account Request Management
Blanket PO Management
Health Score Management
Order Processing
Site Status Updates Pending Approval
Tax Region Map
Tax Verification
Unread Email Management
User Activities
Waste Profile Management