

Account Class Setup - 'Hide Rates On Work Order Format' Option Added (15181) [Enhancement]

Last Modified on 07/20/2023 4:12 pm EDT

In Account Class Setup, a new setup option 'Hide Rate On Work Order Format' has been added to the Details tab. 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 where it can be applied specifically to an account instead of all accounts belonging to the account class.

UPDATE ACCOUNT CLASS

Details Portal / Payment Processing

NAME	ROLL OFF-TEMP	Status Management	ENABLE AUTOMATIC STATUS UPDATE	Yes
ACTIVE	Yes	AUTO CREDIT HOLD PAST DUE DAYS	120	
TYPE	Business	AUTO CREDIT HOLD MINIMUM PAST DUE AMOUNT	1000.00	
GL ACCOUNT	Accounts Receivable	AUTO INACTIVE ACCOUNT/SITE DAYS	120	
GL SEGMENT	12000	AUTO CREDIT HOLD PLACEMENT	Yes	
DEFAULT ACCOUNT CREDIT LIMIT	0	AUTO CREDIT HOLD REMOVAL	Yes	
DEFAULT ACCOUNT TERM	Net 20	STATUS UPDATE TIME	11 AM	Pacific Standard Time
DEFAULT REBATE PAYMENT TYPE	Not Applicable	RUN DAILY AUTO APPLY	No	
DEFAULT BILL BY SITE	No	Finance Charges / Late Fees	FINANCE CHARGE TYPE	Manual Flat Fee
CREATE CONTACT DEFAULT	Account	ANNUAL RATE	0.00	
DEFAULT CONTACT SERVICE NOTIFICATION	Yes	CHARGE CODE	Late Fee	
GEOCODING TYPE	Roof Top	CHARGE MINIMUM	10.00	
GEOFENCE RADIUS (METERS)	30	PAST DUE MINIMUM	20.00	
NEW ACCOUNT NOTIFICATION TEMPLATE				
REQUIRE GENERATOR TYPE	No			
ENABLE LINKING CONTACTS TO ALL SITES	Yes			
LOAD ACTIVE ACCOUNTS IN PIPELINE MAP	Yes			
REQUIRE BILLING CONTACT	No			
HIDE RATE ON WORK ORDER FORMAT	<input checked="" type="checkbox"/>			

Saved.

Pathway: Setup > Accounts > Account Class