

Edit Account - New Field Options Added for Inbound Work Orders (15347) [Enhancement]

Last Modified on 08/07/2023 10:29 am EDT

The Edit Account screen has been updated to include two new check boxes in the Billing section:

1. Hide Work Order Format Rate
 - o If selected, rates will be hidden from view on scale tickets or work orders that support printing rates. This option is also available at the Account Class level for universal application.
2. Inbound Order Auto Print

EDIT ACCOUNT

NAME	<input type="text" value="Test -Leads Analysis"/>	STATUS	<input type="text" value="Active"/>
NAME 2	<input type="text"/>	DIVISION	<input type="text" value="CORPUS"/>
ADDRESS LINE 1	<input type="text" value="12341 Aberdeen St NE"/>	SOURCE	<input type="text" value="Call In"/>
ADDRESS LINE 2	<input type="text"/>	ACCOUNT MANAGER	<input type="text" value="House Account (Invalid)"/>
CITY/STATE/POSTAL CODE	<input type="text" value="Blaine"/> <input type="text" value="MN"/> <input type="text" value="55449-5"/>	ACCOUNT CLASS	<input type="text" value="ROLL OFF-PERM"/>
PHONE	<input type="text" value="(999) 999-9999"/>	AUDITOR	<input type="text"/>
ATTN	<input type="text"/>	WEBSITE	<input type="text"/>
BILLING PHONE	<input type="text" value="(999) 999-9999"/>	LOGO	<input type="text" value="Select logo..."/> <input type="button" value="BROWSE..."/>
FAX	<input type="text" value="(999) 999-9999"/>	OLD ID	<input type="text"/>
BILLING CONTACT 1	<input type="text"/>		
BILLING CONTACT 2	<input type="text"/>		
PARENT ACCOUNT	<input type="text"/>		

Billing

BILL GROUP	<input type="text" value="COR-COMM MON ARREARS"/>	BILL BY SITE	<input type="checkbox"/>	AUTO STATUS UPDATE	<input checked="" type="checkbox"/>
<i>Arrears - Monthly Billed Thru Date Jul 17, 2023 Next Invoice Date Feb 01, 2023 BATCH-25578 (in progress)</i>		APPLY FINANCE CHARGES <input checked="" type="checkbox"/>			
INVOICE BY EMAIL	<input type="text" value="No"/>	EXCLUDE FROM PAYMENT PROCESSING FEE <input type="checkbox"/>			
TERM	<input type="text" value="Net 20"/>	EXCLUDE FROM PAST DUE NOTIFICATION <input type="checkbox"/>			
CREDIT LIMIT	<input type="text" value="0"/>	HIDE WORK ORDER FORMAT RATE <input checked="" type="checkbox"/>			
		INBOUND ORDER AUTO PRINT <input type="checkbox"/>			

AP

DEFAULT PAYMENT METHOD	<input type="text" value="Not Applicable"/>	PAYEE NAME	<input type="text"/>	1099	<input type="checkbox"/>
INSTRUCTIONS	<input type="text"/>				

WARNING ON OPEN

Pathway: Accounts > Search > Accounts

