

Account Class - Screen Modifications to Add/Edit Account Class (15853) [Enhancement]

Last Modified on 10/12/2023 10:22 am EDT

The Add/Edit Account Class screen has been modified with the following changes:

1. The 'Status Management' and 'Finance Charge / Late Fees' sections have been relocated to their own tabs.
2. Two new fields "Deposit GL Account" and "Deposit GL Segment" have been added.
3. Fields "Create Contact Default" through "Hide Rate On Work Order Format" have been relocated from the left column over to the right.

ADD ACCOUNT CLASS

Details | Account Portal | Payment Processing | **Status Management** | Finance Charges / Late Fees

NAME	<input type="text"/>	CREATE CONTACT DEFAULT	Account
ACTIVE	<input type="checkbox"/>	DEFAULT CONTACT SERVICE NOTIFICATION	Yes
TYPE	Business	GEOCODING TYPE	<input type="text"/>
GL ACCOUNT	<input type="text"/>	GEOFENCE RADIUS (METERS)	30
GL SEGMENT	<input type="text"/>	NEW ACCOUNT NOTIFICATION TEMPLATE	<input type="text"/>
DEPOSIT GL ACCOUNT	<input type="text"/>	REQUIRE GENERATOR TYPE	<input type="text"/>
DEPOSIT GL SEGMENT	<input type="text"/>	ENABLE LINKING CONTACTS TO ALL SITES	Yes
DEFAULT ACCOUNT CREDIT LIMIT	<input type="text"/>	LOAD ACTIVE ACCOUNTS IN PIPELINE MAP	Yes
DEFAULT ACCOUNT TERM	<input type="text"/>	REQUIRE BILLING CONTACT	No
DEFAULT REBATE PAYMENT TYPE	<input type="text"/>	EXCLUDE FROM NAVU SALES	No
DEFAULT BILL BY SITE	No	HIDE RATE ON WORK ORDER FORMAT	<input type="checkbox"/>

SAVE

Pathway: Setup > Account > Account Class