Edit Account/Site - Option to Change The Division for Accounts and Sites (16011)(16010) [Enhancement]

Last Modified on 12/04/2023 9:33 am EST

Accounts

An enhancement has been applied to allow editing of the Division field for accounts. Previously, attempting to edit this field when an Accounts Receivable (AR) record existed would result in an error message.

For this enhancement, a new permission has been added:

• 450 - Edit Account Division

Logic:

- Users must have permission 450 to edit account divisions.
 - IF the account is in a Prospect status, users can change the division without permission 450.
- Upon selecting a new division, the Bill Group field is cleared and a new one must be selected (Settings tab).

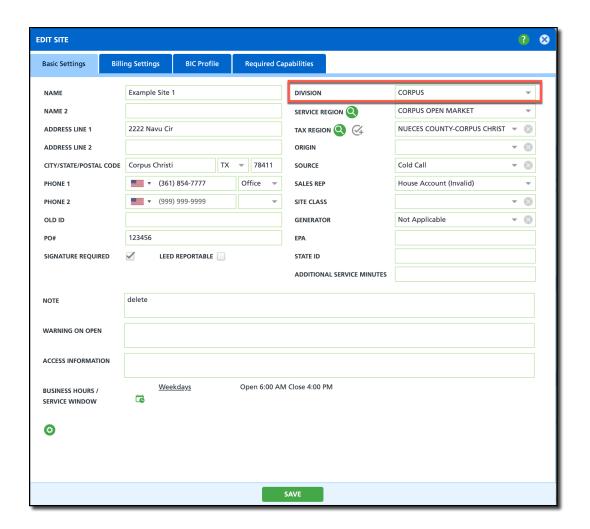
Site

An enhancement has been applied to allow editing of the Division field for sites. For this enhancement, a new permissions has been added:

• 338 - Edit Site Division

Logic:

- Users must have permission 338 to edit site divisions.
 - IF the site is in a Prospect status, users can change the division without permission 338.
- If a division is changed on a site with active site service(s) schedule, a popup will display advising the user to assign the site's active service(s) to a new route. The existing route will be ended upon a division change.
- Upon selecting a new division, the Service Region field for the site will be cleared and a new one must be selected.
- Upon selecting a new division, if 'Site Bill Groups' is enabled, the Bill Group field is cleared and a new one must be selected.



Pathway: Accounts > Customer Service Screen > Edit Account (right click); Edit Site (right click)