

# 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.

EDIT SITE
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Basic Settings
Billing Settings
BIC Profile
Required Capabilities

NAME	<input type="text" value="Example Site 1"/>	<b>DIVISION</b>	<input type="text" value="CORPUS"/>
NAME 2	<input type="text"/>	SERVICE REGION	<input type="text" value="CORPUS OPEN MARKET"/>
ADDRESS LINE 1	<input type="text" value="2222 Navu Cir"/>	TAX REGION	<input type="text" value="NUECES COUNTY-CORPUS CHRIST"/>
ADDRESS LINE 2	<input type="text"/>	ORIGIN	<input type="text"/>
CITY/STATE/POSTAL CODE	<input type="text" value="Corpus Christi"/> <input type="text" value="TX"/> <input type="text" value="78411"/>	SOURCE	<input type="text" value="Cold Call"/>
PHONE 1	<input type="text" value="(361) 854-7777"/> <input type="text" value="Office"/>	SALES REP	<input type="text" value="House Account (Invalid)"/>
PHONE 2	<input type="text" value="(999) 999-9999"/>	SITE CLASS	<input type="text"/>
OLD ID	<input type="text"/>	GENERATOR	<input type="text" value="Not Applicable"/>
PO#	<input type="text" value="123456"/>	EPA	<input type="text"/>
SIGNATURE REQUIRED	<input checked="" type="checkbox"/> LEED REPORTABLE <input type="checkbox"/>	STATE ID	<input type="text"/>
		ADDITIONAL SERVICE MINUTES	<input type="text"/>
NOTE	<input type="text" value="delete"/>		
WARNING ON OPEN	<input type="text"/>		
ACCESS INFORMATION	<input type="text"/>		
BUSINESS HOURS / SERVICE WINDOW	<input type="text" value="Weekdays"/> <input type="text" value="Open 6:00 AM Close 4:00 PM"/>		

SAVE

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