

# Accounts - Default Logic Updated for Accounts When Status Changes from Prospect to Active (15936) [Enhancement]

Last Modified on 12/14/2023 3:58 pm EST

The following default setting logic has been updated to accounts when the status changes from Prospect to Active:

1. In Account Class Setup, values found in the *Default Account Term*, *Default Account Credit Limit*, and *Default Rebate Payment Type* fields will auto-populate for the account.
2. By default, 'Auto Status Update' and 'Apply Finance Charges' check box fields in Edit Account (Settings) will default to being checked.

**EDIT ACCOUNT**

Account Settings

**Billing**

BILL GROUP: DAY-BAD DEBT \ INACTIVE

Arrears - Monthly Billed Thru Date Oct 31, 2023 Next Invoice Date

INVOICE BY EMAIL: Email With Link

TERM: Net 20

CREDIT LIMIT: 160

BILL BY SITE  AUTO STATUS UPDATE

APPLY FINANCE CHARGES

EXCLUDE FROM PAYMENT PROCESSING FEE

EXCLUDE FROM PAST DUE NOTIFICATION

HIDE WORK ORDER FORMAT RATE

INBOUND ORDER AUTO PRINT

**AP**

DEFAULT PAYMENT METHOD: Not Applicable

PAYEE NAME:  1099

INSTRUCTIONS:

WARNING ON OPEN:

**SAVE**

Pathway: Accounts > Search > Accounts; Setup > Account > Account Class