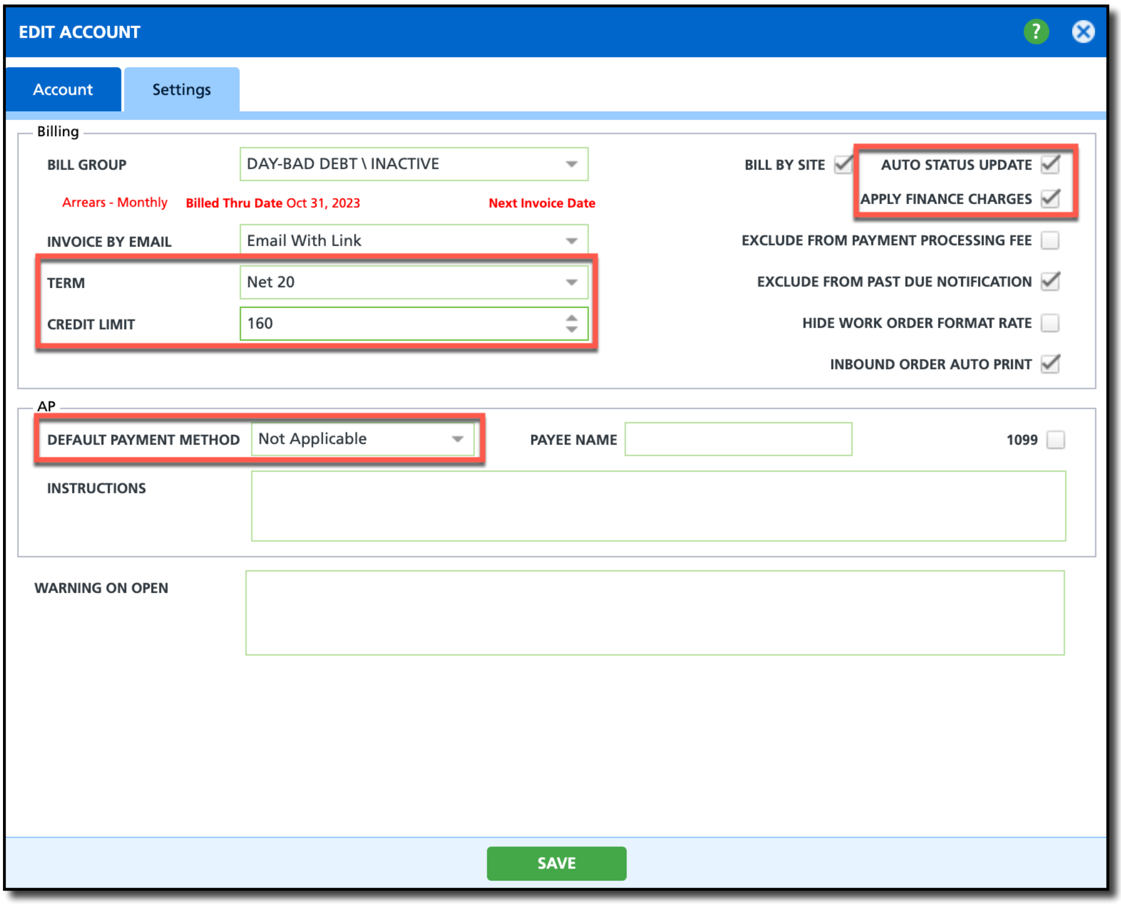
Accounts - Default Logic Updated for Accounts When Status Changes from Prospect to Active (15936) [Enhancement]

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.



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