

Accounts - Clone Site Functionality Available (16270) [Enhancement]

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The option 'Clone Site and Services' has been added to the account menu drop down. To use this feature, users must have permission 453 (Clone Site and Services). Review the Clone Site and Services article to learn more about how to use this feature.

The screenshot displays the Navusoft Premier Waste And Recycling account management interface. The account details for 'Navusoft Premier Waste And Recycling' (Account ID: 41898) are visible, including address, division (DAYTON), and account manager (House Acct non System). A table shows bill amounts for various periods (1-30, 31-60, 61-90, 91-120, 120+, TOTAL) with values ranging from 0.00 to 956.87. A 'Clone Site and Services' menu option is highlighted in the left sidebar, with a red arrow pointing to it. A 'CLONE SITE' dialog box is open, showing options for 'CLONING METHOD' (Clone Site, Clone Site and Services), an 'EFFECTIVE DATE' field, and a 'CLONE NOTE' text area. A 'SAVE' button is located at the bottom of the dialog.

Pathway: Accounts > Customer Service Screen > + Menu > Clone Site and Services