

Account Class (Setup) - New 'Enable Duplicate Account and Site Check' Field Added (16529) [Enhancement]

Last Modified on 05/14/2024 10:33 am EDT

A new setting field 'Enable Duplicate Account and Site Check' has been added to the Details tab in Account Class Setup. The following logic applies to the selection options:

- Yes: Enables the account/site creation duplication check. This is also the default setting for the field.
- No: Disables the account/site creation duplication check.

The screenshot shows the 'UPDATE ACCOUNT CLASS' interface with the 'Details' tab selected. The form contains various configuration fields. The field 'ENABLE DUPLICATE ACCOUNT AND SITE CHECK' is highlighted with a red rectangular box. Below it, the 'HIDE RATE ON WORK ORDER FORMAT' checkbox is visible and unchecked.

UPDATE ACCOUNT CLASS				
Details	Customer Portal	Payment Processing	Status Management	Finance Charges / Late Fees
NAME	COMMERCIAL	CREATE CONTACT DEFAULT	Account	
ACTIVE	Yes	DEFAULT CONTACT SERVICE NOTIFICATION	Yes	
TYPE	Business	GEOCODING TYPE	Roof Top	
GL ACCOUNT	Accounts Receivable	GEOFENCE RADIUS (METERS)	30	
GL SEGMENT	12000	NEW ACCOUNT NOTIFICATION TEMPLATE	116	
DEPOSIT GL ACCOUNT	CNB Bank Account	REQUIRE GENERATOR TYPE	No	
DEPOSIT GL SEGMENT	14000	ENABLE LINKING CONTACTS TO ALL SITES	Yes	
DEFAULT ACCOUNT CREDIT LIMIT	500	LOAD ACTIVE ACCOUNTS IN PIPELINE MAP	Yes	
DEFAULT ACCOUNT TERM	Net 20	REQUIRE BILLING CONTACT	No	
DEFAULT REBATE PAYMENT TYPE	ACH	EXCLUDE FROM NAVU SALES	No	
DEFAULT BILL BY SITE	No	ENABLE DUPLICATE ACCOUNT AND SITE CHECK	Yes	
GENERATE NEW SAP ACCOUNT ID	No	HIDE RATE ON WORK ORDER FORMAT	<input type="checkbox"/>	

Pathway: Setup > Account > Account Class