

Create Account (Accounts) - Account and Site Custom Properties Moved (17085)

Last Modified on 07/26/2024 9:03 am EDT

Within the 'Create Account' screen, *Account Custom Properties* and *Site Custom Properties* have been relocated to the bottom left of the screen.

The screenshot displays the 'CREATE ACCOUNT' form with the following sections and fields:

- Header:** CREATE ACCOUNT (left), ACCOUNTS > ADD ACCOUNT (right)
- Form Fields:**
 - STATUS: [Dropdown]
 - SOURCE: Call In [Dropdown]
 - ACCOUNT DIVISION: HEARNE [Dropdown]
 - SITE DIVISION: HEARNE [Dropdown]
 - ACCOUNT CLASS: RESIDENTIAL [Dropdown]
- Service Address:**
 - NAME: [Text]
 - NAME 2: [Text]
 - ADDRESS LINE 1: Enter a location [Text]
 - ADDRESS LINE 2: [Text]
 - CITY/STATE/POSTAL CODE: [Text]
 - PHONE: [Country] (999) 999-9999 [Text]
- Billing Address:**
 - Same as service address
 - NAME: [Text]
 - NAME 2: [Text]
 - ATTN: [Text]
 - ADDRESS LINE 1: Enter a location [Text]
 - ADDRESS LINE 2: [Text]
 - CITY/STATE/POSTAL CODE: [Text]
 - PHONE: [Country] (999) 999-9999 [Text]
- Contact Information:**
 - CONTACT NAME: [Text]
 - TITLE: [Text]
 - CONTACT EMAIL: [Text]
 - CONTACT PHONE: [Country] (999) 999-9999 [Text]
 - PHONE TYPE: [Dropdown]
 - BILLING CONTACT:
- Billing:**
 - BILL GROUP: [Dropdown]
 - INVOICE BY EMAIL: No [Dropdown]
 - TERM: COD [Dropdown]
 - CREDIT LIMIT: 0 [Text]
 - SURCHARGE GROUP: Fuel Surcharge 10% [Dropdown]
 - AUTO STATUS UPDATE:
 - APPLY FINANCE CHARGES:
 - EXCLUDE FROM PAST DUE NOTIFICATION:
- Regional Settings:**
 - SALES REP: House Account [Dropdown]
 - SITE CLASS: [Dropdown]
 - SERVICE REGION: Hearne_SR [Dropdown]
 - TAX REGION: ALAMO HEIGHTS CITY [Dropdown]
 - ORIGIN: [Dropdown]
- Custom Properties (highlighted in red):**
 - ACCOUNT CUSTOM PROPERTIES [Icon]
 - SITE CUSTOM PROPERTIES [Icon]
- Buttons:** CREATE ACCOUNT, CLEAR

Pathway: Accounts > Add Accounts