

Add/Edit Account (Accounts) - Broker Group Field Added (17084) [New Feature]

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A new Broker Group field has been added to the Add/Edit Account screen. To enable this field, the following setup is required:

- In *Setup > System > System Options*, under the Account tab, 'Require Broker Group For Broker Account Class Type' must be set to "Yes."
- In *Setup > Account*, a new 'Broker Group' setup screen has been added.
 - In here, users must search for an existing broker account to create the broker group.
- In Add/Edit Account, the Account Class selected must be "Broker."

The screenshot shows the 'EDIT ACCOUNT' interface with the 'Settings' tab selected. The 'ACCOUNT CLASS' and 'BROKER GROUP' fields are highlighted with a red box. The 'ACCOUNT CLASS' is set to 'BROKER' and the 'BROKER GROUP' is set to 'BrokerGroup1'. Other fields include NAME, ADDRESS LINE 1, CITY/STATE/POSTAL CODE, PHONE, and STATUS.

Field	Value
NAME	Example Account 3
NAME 2	
ADDRESS LINE 1	223 COUNTY ROAD 6385
ADDRESS LINE 2	
CITY/STATE/POSTAL CODE	DAYTON TX 77535-5
PHONE	(999) 999-9999
ATTN	
BILLING PHONE	(999) 999-9999
FAX	(999) 999-9999
BILLING CONTACT 1	
BILLING CONTACT 2	
PARENT ACCOUNT	
STATUS	Active
DIVISION	DAYTON
SOURCE	
ACCOUNT MANAGER	House Account (Invalid)
ACCOUNT CLASS	BROKER
BROKER GROUP	BrokerGroup1
COLLECTION AGENT	
WEBSITE	
LOGO	Select logo... BROWSE...
OLD ID	DAY-8338

Pathway: *Accounts > Search > Accounts*