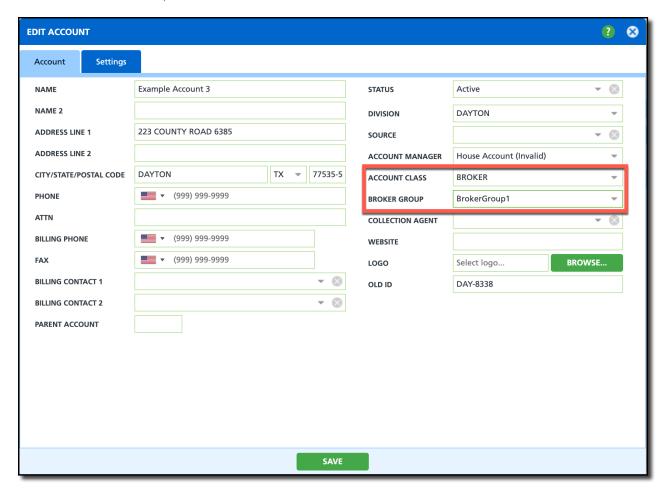
Add/Edit Account (Accounts) - Broker Group Field Added (17084) [New Feature]

Last Modified on 08/12/2024 12:40 pm EDT

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."



Pathway: Accounts > Search > Accounts