

# Account Class Setup (Setup) - "Require Site Class" Field Added (17098)

Last Modified on 08/07/2024 9:40 am EDT

In the Details tab of the Account Class screen, a new 'Require Site Class' checkbox has been added. This checkbox requires that a site class be selected when creating a new account or site within that account class.

The screenshot shows the 'UPDATE ACCOUNT CLASS' interface with the 'Details' tab selected. The form is organized into two columns of fields. The 'Require Site Class' checkbox is highlighted with a red box and is checked. The 'Saved.' status is visible in the bottom right corner.

UPDATE ACCOUNT CLASS				
Details	Customer Portal	Payment Processing	Status Management	Finance Charges and Other 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	SEG12	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	
		HIDE RATE ON WORK ORDER FORMAT	<input type="checkbox"/>	
		REQUIRE SITE CLASS	<input checked="" type="checkbox"/>	

Saved.

Pathway: Setup > Accounts > Account Class