

New Account Template (Setup) - Logic Updated to Bill Group Field in Add/Edit New Account Template (17188)

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A change has been made to the Add/Edit New Account Template, removing the limitation that restricted Bill Group selection based on the Division. In Bill Group Setup, if the Division field is left blank, the bill group will be universally available to all divisions in the New Account Template screen.

The screenshot displays the 'NEW ACCOUNT TEMPLATE SETUP' interface. At the top, there is a blue header with a plus icon. Below the header is a table with the following columns: ID, NAME, DIVISION, SALES REP, and SOURCE. The table contains three rows of data:

ID	NAME	DIVISION	SALES REP	SOURCE
1000	Other	HEARNE	House Account - House Accou...	Call In
1001	Houston Accts	HOUSTON	Aliena Somers - Admin-NS (A...	Call In
1002	QA Accts		Aliena Somers - Admin-NS (A...	Call In

An 'EDIT NEW ACCOUNT TEMPLATE' modal window is overlaid on the table. It contains the following fields and options:

- NAME: Other
- DIVISION: HEARNE
- SALES REP: House Account - House Account (
- SOURCE: Call In
- ACCOUNT CLASS: RESIDENTIALa
- BILL GROUP: (highlighted in yellow) with a dropdown menu showing 'Annual Billing', 'DAY-ROLF LIBERTY', 'SCALE CASH', and 'Test 2'.
- TERM: VENDORS
- REBATE PAYMENT TYPE: SCALE CASH
- SERVICE REGION: VENDORS
- TAX REGION: ALAMO HEIGHTS CITY
- SURCHARGE GROUP: Fuel Surcharge 10%

Pathway: Setup > Accounts > New Account / Site Template