

Edit Site (Accounts) - Modification to Site Level Finance Charges (20255)

Last Modified on 01/09/2026 11:39 am PST

The billing process has been updated for accounts with Bill by Site enabled to apply only site-level finance charges associated with the site's assigned bill group, excluding account-level finance charges.

The screenshot displays two overlapping application windows: 'EDIT ACCOUNT' and 'EDIT SITE'.

EDIT ACCOUNT (Top Window):

- Billing Section:**
 - BILL GROUP: QA Billing Quarterly
 - INVOICE BY EMAIL: No
 - TERM: Due upon receipt
- Advanced Options:**
 - BILL BY SITE
 - AUTO STATUS UPDATE
 - APPLY FINANCE CHARGES
 - EXCLUDE FROM PAYMENT PROCESSING FEE

EDIT SITE (Bottom Window):

- Basic Settings:**
 - TAX EXEMPT?
 - TAX EXEMPT REASON: (empty text field)
 - SURCHARGE GROUP: (empty dropdown)
 - INVOICE BY EMAIL: Account Settings
 - SITE BILLING CONTACT1: (empty dropdown)
 - SITE BILLING CONTACT2: (empty dropdown)
 - PAYEE NAME: (empty text field)
- Advanced Options:**
 - BILL GROUP: Test Finance Charge Site Level
 - Advance - Monthly
 - Billed Thru Date Nov 30, 2025
 - Next Invoice Date Dec 01, 2025 BATCH-26433 (not started)

Buttons: The 'SAVE' button is located at the bottom right of the 'EDIT SITE' window.

Pathway: Customer Service Screen > Edit Site > Billing Settings