

Edit Account (Accounts) - Edit Account Screen Accessible After Splitting or Transferring Check Payments (20143)

Last Modified on 01/16/2026 1:53 pm PST

An issue was resolved where the Edit Account screen would not open after a payment was split or transferred on an account, regardless of whether it was accessed by right-clicking and selecting **Edit** or by double-clicking.

The screenshot shows the 'EDIT ACCOUNT' window with the following details:

- Account Section:**
 - NAME: Poco Loca
 - NAME 2: (empty)
 - ADDRESS LINE 1: 1234 Glendale Blvd
 - ADDRESS LINE 2: (empty)
 - CITY/STATE/POSTAL CODE: Los Angeles, CA, 90039-1
 - PHONE: (555) 555-3458
 - ATTN: (empty)
 - BILLING PHONE: (201) 555-0123
 - FAX: (201) 555-0123
 - BILLING CONTACT 1: (empty)
 - BILLING CONTACT 2: (empty)
 - PARENT ACCOUNT: (empty)
- Settings Section:**
 - STATUS: Active
 - DIVISION: QAWASTE
 - SOURCE: Call In
 - ACCOUNT MANAGER: Aliena Somers - Admin-NS (Sales)
 - ACCOUNT CLASS: COMMERCIAL
 - AUDITOR: (empty)
 - COLLECTION TYPE: (empty)
 - WEBSITE: (empty)
 - LOGO: Select logo... (BROWSE... button)
 - OLD ID: (empty)
 - ERP ID: (empty)

A green 'SAVE' button is located at the bottom right of the form.

Pathway: Customer Service Screen > [double or right click] Edit Account