Account Class (Setup / Account) - New 'National Accounts' Added to Account Class Type Options (20344, 20302)

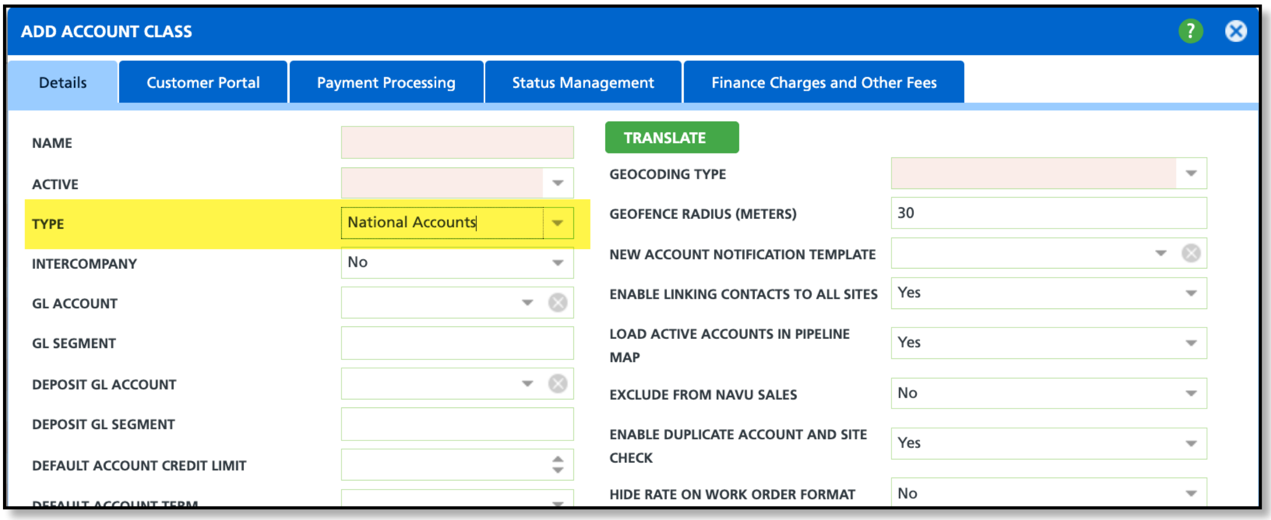
Last Modified on 01/20/2026 12:41 pm PST

A new account class type, **National Accounts**, has been added. When enabled, the National Account type allows recording a vendor rate but does not allow selecting a vendor. This account type is intended for internal or intercompany servicing.

To tighten division security for National Accounts, the following permissions were removed and replaced with enhanced logic on the customer service screen:

- **Permissions removed**
  - Add Site to Broker Account
  - Edit Site on Broker Account
  - Add or Edit Active Service on Broker Account
  - Add on Call Work Order for Broker Account
- **Enhanced Logic**
  - When the account class type is **Broker** or **National Account** and the user does not have access to the account's division the following applies:
    1. **Menu options**: Site, Clone Site and Split Site into New Account options are hidden.
    2. The **Add option** on the Site Search window is hidden.
    3. The **Edit Site** option on the Site window is hidden.
    4. All locations to add an **active service** are hidden.
    5. The ability to double click and open **Site Service** is disabled and the following Site Service right-click options are hidden:
       - Edit
       - Reverse
       - Transfer
       - Link Parent Site
    6. The Reverse right-click option in **View Rate History** is hidden.
    7. **On Call Order** options are available if users have either site division access or account division access for Broker/National Accounts.

Additional features and enhancements for National Accounts are planned for **version 78**.



Pathway: *Setup > Account > Account Class*