

Account Class (Setup) - Screen Enhancements (20543)

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We have redesigned the **Add Account Class** interface to streamline data entry and improve page navigation. These updates focus on visual clarity and reducing time spent. The key enhancements are:

- 1. Real-Time Validation Indicators:** Each of the five tabs now feature a **red tick mark**. This indicator remains visible until all required fields within that specific tab are completed.
- 2. Optimized Two-Column Layout:** Fields are now organized into a **two-column grid** rather than a single vertical list. This consolidated view significantly reduces page length and provides a more concise overview of account class details.
- 3. Improved Label Alignment:** To create a clearer visual connection between descriptions and data entry, all field labels are now **right-aligned**.
- 4. Editable Field Indicator:** New visual cues have been added to text and numeric fields to instantly indicate whether a field is **editable** vs a dropdown, preventing confusion during the update process.

Pathway: Setup > Account Class > [Select green + to create new]

The screenshot displays the 'ADD ACCOUNT CLASS' form with a two-column layout. The top navigation bar includes tabs: 'Details', 'Customer Portal', 'Payment Processing', 'Status Management', and 'Finance Charges and Other Fees'. Red annotations highlight key features: 1. A red tick mark on the 'Details' tab. 2. A red tick mark on the 'Status Management' tab. 3. A red arrow pointing to the 'Geocoding Type' dropdown menu. 4. A red arrow pointing to the 'GL Segment' field, which has a green edit icon. The form contains various fields such as 'NAME', 'ACTIVE', 'TYPE', 'INTERCOMPANY', 'GL ACCOUNT', 'DEPOSIT GL ACCOUNT', 'DEPOSIT GL SEGMENT', 'DEFAULT ACCOUNT CREDIT LIMIT', 'DEFAULT ACCOUNT TERM', 'DEFAULT REBATE PAYMENT TYPE', 'DEFAULT BILL BY SITE', 'DEFAULT CONTACT LINK TYPE', 'DEFAULT CONTACT SERVICE NOTIFICATION', 'GEOFENCE RADIUS (METERS)', 'NEW ACCOUNT NOTIFICATION TEMPLATE', 'ENABLE LINKING CONTACTS TO ALL SITES', 'LOAD ACTIVE ACCOUNTS IN PIPELINE MAP', 'EXCLUDE FROM NAVU SALES', 'ENABLE DUPLICATE ACCOUNT AND SITE CHECK', 'HIDE RATE ON WORK ORDER FORMAT', 'REQUIRE BILLING CONTACT', 'REQUIRE GENERATOR TYPE', and 'REQUIRE SITE CLASS'. A 'Save' button is located at the bottom center.

We've also added a smart counter to the **Update Account Class** page. Located in the bottom-right corner, this counter tracks missing data, providing a clear count of required fields that need your attention before you can finalize your updates.

- This counter works in tandem with the **red tick marks** on each tab, guiding you directly to the sections that require completion.
- Each field missing data is also highlighted in red with a red exclamation icon.

Pathway: Setup > Account Class > [Double click an account class to edit]

- Details **1**
- Customer Portal
- Payment Processing **2**
- Status Management
- Finance Charges and Other Fees

NAME **!**

Translate **0**

ACTIVE No

TYPE Business

INTERCOMPANY No

GL ACCOUNT

GL SEGMENT 234

DEPOSIT GL ACCOUNT

DEPOSIT GL SEGMENT 1234

DEFAULT ACCOUNT CREDIT LIMIT

DEFAULT ACCOUNT TERM

DEFAULT REBATE PAYMENT TYPE

DEFAULT BILL BY SITE No

DEFAULT CONTACT LINK TYPE Account

DEFAULT CONTACT SERVICE NOTIFICATION Yes

GEOCODING TYPE Roof Top

GEOFENCE RADIUS (METERS) 30

NEW ACCOUNT NOTIFICATION TEMPLATE

ENABLE LINKING CONTACTS TO ALL SITES Yes

LOAD ACTIVE ACCOUNTS IN PIPELINE MAP Yes

EXCLUDE FROM NAVU SALES No

ENABLE DUPLICATE ACCOUNT AND SITE CHECK Yes

HIDE RATE ON WORK ORDER FORMAT No

REQUIRE BILLING CONTACT

REQUIRE GENERATOR TYPE

REQUIRE SITE CLASS

! 3 Errors