Account Class (Setup) - Screen Enhancements (20543)

Last Modified on 03/20/2026 12:50 pm PDT

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]*

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 an red exclamation icon.

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

UPDATE ACCOUNT CLASS

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

NAME	**!**	Translate **0**	GEOCODING TYPE	Roof Top
ACTIVE	No		GEOFENCE RADIUS (METERS)	30
TYPE	Business		NEW ACCOUNT NOTIFICATION TEMPLATE	
INTERCOMPANY	No		ENABLE LINKING CONTACTS TO ALL SITES	Yes
GL ACCOUNT			LOAD ACTIVE ACCOUNTS IN PIPELINE MAP	Yes
GL SEGMENT	234		EXCLUDE FROM NAVU SALES	No
DEPOSIT GL ACCOUNT			ENABLE DUPLICATE ACCOUNT AND SITE CHECK	Yes
DEPOSIT GL SEGMENT	1234		HIDE RATE ON WORK ORDER FORMAT	No
DEFAULT ACCOUNT CREDIT LIMIT			REQUIRE BILLING CONTACT	
DEFAULT ACCOUNT TERM			REQUIRE GENERATOR TYPE	
DEFAULT REBATE PAYMENT TYPE			REQUIRE SITE CLASS	
DEFAULT BILL BY SITE	No			
DEFAULT CONTACT LINK TYPE	Account			
DEFAULT CONTACT SERVICE NOTIFICATION	Yes			

! 3 Errors