

Customer Service (Accounts) - External Broker ID field added for Broker and National Accts (21721)

Last Modified on 07/15/2026 2:05 pm PDT

A new field labeled **Broker ID** has been added at the site level to support the tracking of an external broker's identifier. This field displays conditionally on the *Add/Edit Site* screen and the *Customer Service* site detail, and is only displayed for accounts with an account class of type Broker or National.

The screenshot shows the 'Add/Edit Site' form for a 'NATIONAL ACCT'. The 'BROKER ID' field is highlighted in yellow and contains the value 'BrokerID123'. Other fields include 'NAME', 'ADDRESS LINE 1', 'CITY/STATE/POSTAL CODE', 'PHONE 1', 'PHONE 2', 'OLD ID', 'PO#', 'SIGNATURE REQUIRED', 'LEED REPORTABLE', 'VIP', 'NOTE', 'WARNING ON OPEN', 'ACCESS INFORMATION', 'BUSINESS HOURS / SERVICE WINDOW', 'DIVISION', 'SERVICE REGION', 'TAX REGION', 'ORIGIN', 'SOURCE', 'SALES REP', 'SITE CLASS', 'GENERATOR', 'EPA', 'STATE ID', and 'ADDITIONAL SERVICE MINUTES'. The 'BROKER ID' field is located under the 'BASIC SETTINGS' tab.

Pathway: *Customer Service > Add / Edit Site*

The **Broker ID** data is also visible as the **Site Broker Location ID** when querying the **Account and Site** entity.

The screenshot shows the 'Database Query' results for 'Accounts and Sites Results - 07/15/2026 3:49:13 pm'. The 'SITE BROKER LOCATION ID' field is highlighted in yellow. The query results show a single record with the following data:

ACCOUNT CLASS NAME	ACCOUNT NAME	ACCOUNT ID	SITE NAME	SITE ID	SITE BROKER LOCATION ID
NATIONAL	NATIONAL ACCT	59957	NATIONAL ACCT	59957001	BrokerID123

Pathway: *Database > Database Query*

