Account Types Screen

Admin - Configuration · https://learn.logisense.com/docs/608993297/

Last verified with: 10.8.6.0

Account Types are configured in Setup / Users & Accounts / Accounts / Account Types

Overview

Account types are used to classify accounts into meaningful business groupings, such as enterprise, partner, reseller, or other customer segments. These classifications are useful for organizing accounts and for filtering data in reporting and operational analysis.

An account type is typically selected when an account is created, but it can also be updated later from the account settings area.

Prerequisites

Account types can be configured immediately. There are no prerequisite configuration steps.

Account Types Panel

The Account Types panel on the left lists the configured account types. Select an account type to view or edit its details in the panel on the right.

Actions

Icon	Description
	Deletes the account type if not in use (set on an account)
	Adds a new account type

Edit Account Type Panel

The Edit Account Type panel displays the details for the selected account type.

Fields

- **Name**: Identifies the account type.
- **Default**: Determines whether this account type is selected by default when a new account is created. Only one account type can be marked as the default.

References Tab

The **References** tab shows where the selected account type is being used elsewhere in the system. This is useful when reviewing the impact of a change or determining whether the account type can be deleted.

Guides

Adding Account Types

1. In the **Account Types** panel, click **Add**.
2. Enter the **Name**.
3. If this should be the default account type for new accounts, enable **Default**.
4. Click **Save**.

Editing Account Types

1. In the **Account Types** panel, select the account type you want to update.
2. Update the account type details as needed.
3. Click **Save**.

Deleting Account Types

Note: Account types that are configured on system entities (i.e. Accounts) cannot be deleted.

1. In the **Account Types** panel, select the account type you want to delete.
2. Review the **References** tab to confirm the account type is not in use.

3. Click **Delete**.
4. In the confirmation dialog, click **Yes**.