Account Status Types Example

Admin Examples · https://learn.logisense.com/docs/634454139/

Summary

Account status types allow you to define what statuses an account can be in (Pre-Active, Active, Suspended, etc.). When creating account status types you can set the status type to be billable or non-billable as well as specifying if an account can be modified while it is in the status.

In this example an Account Status Type of ‘PreActive’ will be created which will be set as ‘Non-Billable' with the ‘Prevent Changes’ setting disabled. When set this status will not bill recurring charges on the account and will permit changes to be made to the account (e.g. packages can be added to the account, account and account-package settings can be modified).

For additional details on the fields presented on the account status types screen see the Account Status Types Screen screen help article.

Prerequisites

- Account status types can be setup immediately, there are no prerequisite configuration steps

Sample Configuration

Adding an Account Status Type

1. Log into the LogiSense Billing application
2. Click on the **Setup** menu, **Users & Accounts** and then **Accounts**
3. Under **Accounts** click on the **Status Types** tab in the upper right
4. Under the **Account Status Types** heading, click the icon to add a new account status type
5. In the **Add Account Status Type** section populate the settings as follows:

1. **Name** ‘PreActive’
2. **Default** enabled (automatically selects this status on the Add New Account screen)
3. **Status** as ‘Non-Billable’ (so that recurring charges aren’t applied to the account while in the PreActive status)
4. **Prevent Changes** unchecked (so that the account can be modified while in the PreActive status)

6. Click **Save** to add the status type

Once saved, the *PreActive* status will be the default value in the **Status** field when adding a new account.

Next Steps

- **Contact Types Optional Configuration**:
  - **Optional**: Once account status types are configured you can define the contact types that accounts can contain. See the Contact Types Configuration Example for an example of how to setup a contact type

- **Currency Exchange Required Settings**:
  - A currency exchange must be configured as an exchange is required when setting up a bill run. See the Currency Exchange Configuration Example article