

Setup - Reason Code (14109)[Enhancement]

Last Modified on 01/23/2023 3:07 pm EST

GL Account functionality has been added to Reason Code Set Up for new and existing Reason Codes. After a GL Account has been identified for a Reason Code, it will display in the GL Account column of the Reason Code Set Up screen.

The screenshot displays the 'REASON CODE SETUP' interface. On the left, a table lists various reason codes with columns for ID, NAME, and TYPE. The 'IS ACCOUNT' column is highlighted in yellow. An 'EDIT REASON CODE' dialog box is open, showing fields for TYPE, ID, NAME, EXTERNAL ID, SALESREPRESENTATIVE, and several checkboxes (e.g., IS NEW OWNER, IS OLD OWNER, EXCLUDE FROM TIER, EXCLUDE FROM COMMISSION, IS TEMP, DISPLAY IN MOBILE, CAPTURE CONTRACTOR). The 'GL ACCOUNT' field is highlighted in red, and a red arrow points from this field to the 'IS ACCOUNT' column in the main table.

ID	NAME	TYPE	IS ACCOUNT
REQ	Request	Customer Request	
NEWCUST	New Customer	ADD	
APR	Automated Price Increase	UPDATE	
BADDEBT0	Bad Debt 2019	Invoice Adjust	
BADDEBT1	Bad Debt 2020	Invoice Adjust	
BADDEBT2	Bad Debt 2021	Invoice Adjust	
BLOCKED	Blocked Cart	Service Exception	
COMPL	Complete phone termination	END	
CHG_CORN	Change Commission	UPDATE	
CHG_PD	Chg- Price Decrease	UPDATE	
CHG_PI	Chg- Price Increase	UPDATE	
CHG_SDCDE	Chg- Service Decrease	UPDATE	
CHG_SDCIN	Chg- Service Increase	UPDATE	
CLC	Lost to Competition	END	
FINC	Printed back to next connect	UPDATE	
COL_FEE	Collection Fee	Invoice Adjust	
COURTNEY	Courtesy Credit	Invoice Adjust	
DN	Print invoice not sent	UPDATE	
DAMAGE	Damage Credit	Invoice Adjust	
DN	Lost to Discontinue	END	
DNF	Lost to Discontinue Outside Ser Area	END	
END	End - End Service	END	
END_CDMAT	End - Temp Job Complete	END	
END_CON	End - Conversion	END	
FINCROSS	Fin Request	Service Exception	
FINCROSS	Recycling Contaminated	Service Exception	
FINCROSS	Fin Fee	Down Time	
FINCROSS	New Installation	ADD	
FINCROSS	New Business due to New Owner	ADD	
FINCROSS	New Business - From Competitor	ADD	
FINCROSS	ADD - Conversion	ADD	
FINCROSS	Revised bid pay customer	ADD	
FINCROSS	New Business - Green Field	ADD	

Pathway: Setup > System > Reason Code