

Service Detail - Updates to Charges Source Location (14893) [Enhancement]

Last Modified on 03/22/2023 12:37 pm EDT

Enhancements have been applied to the following Service Record tabs:

1. Charges
 - Ability to add the same charge code more than once.
2. Source Location (enabled on the Work Type)
 - Ability to add more than one Source Location. Select the green + icon from within the Source Location tab.
 - Addition of a search box.
 - Option to remove a source location. The location will continue to display with the option to add but will not be available to link charges to.
 - Linked Charges column added. Upon selection, the 'Service Record Charges' popup will display. Click within the Service Location column to assign a location to a charge code.

The screenshot displays the 'EDIT SERVICE RECORD' interface. The top section shows account details for 'Example Account' at 1234 5th Ave, Beach City, TX 77523-8311. Below this are fields for 'ORDER NOTES', 'PO NUMBER', 'EXTERNAL ID', 'SCHEDULED DATE' (03/22/23 Wednesday), 'ROUTE', 'DESTINATION / ORIGIN', 'VENDOR' (Test Trash), 'WORK STATUS' (Scheduled), 'EXCEPTION REASON', and 'POSTING STATUS' (Pending). A navigation bar includes tabs for 'Charges' (with a red '2'), 'Source Location', 'Disposal / Ship', 'Payments', 'Completion Data', 'Attachments', 'Inventory', 'Labels', and 'Photos'. The 'Source Location' tab is active, showing a search box and a table of locations:

LOCATION ID	NAME	ADDRESS ↑	ADDRESS2	CITY, STATE, ZIP	PHONE	STATE ID	NOTE	LINKED CHARGES
1011	Test Location 1	30th Ave		Osceola, WI 54020				0 of 2
1012	Test Location 2	Polk St Croix...		Somerset, WI 54025				0 of 2
	Example Account	1234 5th Ave		Beach City, TX 77523-...				0 of 2

A red arrow points to the green '+' icon in the 'LINKED CHARGES' column for the 'Example Account' row. Below the table, a 'SERVICE RECORD CHARGES' popup is open, showing a table with columns: 'SERVICE LOCATION', 'QUANTITY', 'UNIT OF MEASURE', 'CHARGE CODE', and 'MATERIAL'. The first row shows 'Test Location 1 - 30th Ave, Osceola, WI' with a quantity of 1 and unit 'service', with 'Roll Off Haul' as the charge code. The second row shows a quantity of 0 and unit 'ton', with 'Roll Off Disposal Per Ton' as the charge code. A mouse cursor is positioned over the dropdown arrow in the 'SERVICE LOCATION' column of the second row.

Pathway: Search/Load Work Order > Charges (tab); Source Location (tab)