

Accounts - Work Order Prepayment Notification Pending (14945)

Last Modified on 04/26/2023 12:22 pm EDT

The following changes have been applied to WO Prepayment Notifications:

1. In Setup > System, 'WO PrePayment Receipt' has been renamed to 'Work Order Prepayment Notification'. This will display as *WO Prepayment Notification* on the calendar and in the email Subject.
2. After a prepayment has been applied, the work order will display 'Prepayment Pending' along with a timestamp of when the notification was sent.
3. Resend a WO Prepayment Notification by clicking on the Prepayment Pending link in the work order. The timestamp will update to the latest time sent.

The screenshot displays the 'EDIT SERVICE RECORD' interface for a work order. The work order details include: Navusoft - Demo, 5410 Leopard St, Corpus Christi, TX 78408, PHONE (281) 441-1206, CREATED BY Matthew Van Doren on 4/21/23 10:19 am, ORDER REASON, SCHEDULED DATE 04/21/23 Friday, ROUTE, SEQUENCE 0, DESTINATION / ORIGIN, WORK STATUS Do Not Service, DO NOT SERVICE REASON Prepayment Hold, and POSTING STATUS Pending. A red box highlights the text: Prepayment \$ 350.00 - Pending (Sent Fri Apr 21, 2023 08:19 AM matthew@navusoft.com). Below the work order details are tabs for Charges \$ 350.00, Source Location, Disposal / Ship, Payments, Completion, Attachments, Inventory, Labels, and Photos. A red arrow points from the 'Payments' tab to an 'EMAIL' dialog box. The email dialog box shows the SUBJECT as 'WO Prepayment Notification', SEND TO (EMAIL), and EMAIL TO CONTACT. The email body text is: Dear Valued Customer, Site @@site_id;; - @@site.name;; Please click the below link to submit payment for your @@servicecode.name;; service currently scheduled for @@workorder.scheduleddate;; at @@site.address.addressLine1;; @@site.address.city;; A prepayment amount of @@requiredprepaymentmount;; is required to schedule and dispatch the requested service. Click here to submit prepayment for @@requiredprepaymentmount;; Thank you, @@division.legalname;;

Pathway: Accounts > Search > Accounts; Setup > System > Notification Template

