Order Processing

Pathway: *Accounts > Order Processing*

The Order Processing screen offers a platform to review new customers (and their services), service changes for existing customers and online on-call orders received from the portal. It allows for adjustments to be made to start dates and rates before the services begin, ensuring all necessary modifications are addressed in advance.

	New Customer/Site	Service Changes	Online On-Call Orders			
DIVISION	CORPUS			Search		
	SUBMITTED DATE	**SITE**		**DIVISION**		**SALES REP**
+	05/10/21 01:03pm	W & S Ag		CORPUS		Matt lori gmail Eckstrom
+	06/14/21 10:44am	CAT 5		CORPUS		Matt lori gmail Eckstrom
+	10/14/21 01:13pm	Taylor Renovations		CORPUS		Rob Tellez
+	10/21/21 10:41am	Randy Villarreal		CORPUS		Rob Tellez
+	03/02/22 03:25pm	Best Western North Padre Island		CORPUS		Matt lori gmail Eckstrom
+	08/17/22 09:16am	Sunbelt Vacuum and Disposal		CORPUS		Matt lori gmail Eckstrom
+	08/17/22 09:16am	Jim Knudtson		CORPUS		Matt lori gmail Eckstrom
+	08/17/22 09:16am	Mike Cantu		CORPUS		Matt lori gmail Eckstrom
+	09/19/22 01:19pm	Overland America		CORPUS		Matt lori gmail Eckstrom
+	11/01/22 10:43am	Islamic Society of South Texas		CORPUS		Matt lori gmail Eckstrom
+	06/09/23 01:06pm	Example Site 1		CORPUS		House Account

Permissions

The following permissions are required to view and use the Order Processing screen:

Permission ID	Permission Name
62	Order Processing
256	Edit Order Processing Start Date
330	Edit Order Processing Rates

Tab: New Customer/Site

In order for a new account or site to be categorized under the "New Customer/Site" tab, two conditions must be met: first, the order form or contract must be approved and sold, and second, the account status must be designated as "Prospect." From this screen, users can review the new customers and sites and access their account by clicking on the account's name.
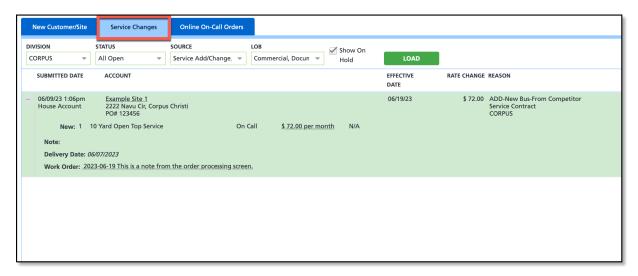
> ✅ Select the expand icon associated with each site to review its information. If a contract exists, it will display as a hyperlink selection option under 'Contract Start Date'.

In the image above, a new site was added that includes a signed service agreement. Selecting the site name will open the customer service screen for the site. Selecting the agreement will open the service agreement.

Tab: Service Changes

The Service Changes tab displays new customers and sites, requiring a user to review all incoming services before they can be posted.

In the image above, a new site was added and the details of the service are displayed.

Editable Fields

The following fields can be edited if the user has the necessary permissions. Refer to the Permissions section in this article to learn more.
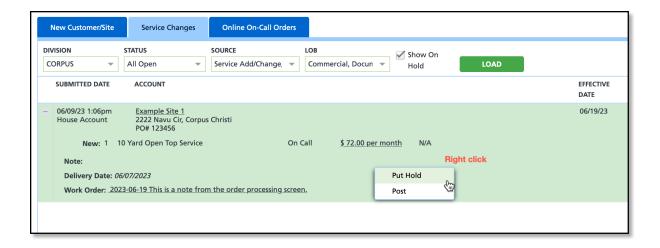
After a service has been posted, any modifications made to the fields listed in the table below will no longer be

reflected in the service or the work order.

Effective Date	Click on the date to open the field and select a new date. *If the service effective date should match the work order delivery date, it is advisable to also update the Work Order Date accordingly.*
Rate Change	Select the underlined rate to update.
Work Order	Select the underlined date for the work order to update the Scheduled Date for the work order. The option to add a note is also provided and will display on the work order under "Order Notes".

Hold or Post a Service Change

The 'Put Hold' and 'Post' selection options are available by right-clicking within the service.
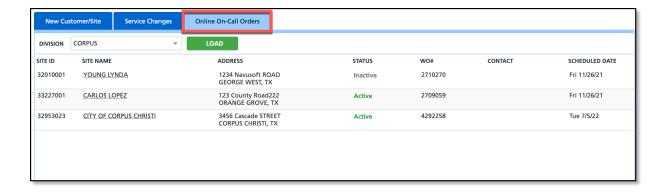

Put Hold

Select "Put Hold" and the service will be placed in a holding status. To review services where a hold has been applied, check the box labeled "Show On Hold" at the top of the screen and then click 'Load'.

Post

Choose the option "Post" to create the service for the account and generate a work order. Once posted, any changes made to the date fields and rate on the screen will not affect the service or the work order.

Tab: Online On-Call Orders

The "Online On-Call Orders" tab displays sites that have requested an on-call order via the Account Portal. Sites can only submit on-call order requests through the portal if the "Enable On Call Orders" field is set to "Yes" in the Account Class settings.

Required Setup

For portal users to submit on-call orders, the "Enable On Call Orders" field must be set to "Yes". Once a portal user submits an on-call order, it will be displayed on the Online On-Call Orders screen.