

# Order Processing

Last Modified on 02/22/2024 3:09 pm EST

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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		SITE		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'.

New Customer/Site Service Changes Online On-Call Orders

DIVISION: CORPUS Search

SUBMITTED DATE	SITE	DIVISION	SALES REP
+ 05/10/21 01:03pm	Coming Home	CORPUS	Tom Pearse
+ 06/14/21 10:44am	CAT 5	CORPUS	Tom Pearse
+ 10/14/21 01:13pm	Taylor Renovations	CORPUS	Rob Johnson
+ 10/21/21 10:41am	Randy Erickson	CORPUS	Rob Johnson
+ 03/02/22 03:25pm	Best Western North Padre Island	CORPUS	Tom Pearse
+ 08/17/22 09:16am	Sunbelt Vacuum and Disposal	CORPUS	Tom Pearse
+ 08/17/22 09:16am	Jim Anderson	CORPUS	Tom Pearse
+ 08/17/22 09:16am	Mike Roberts	CORPUS	Tom Pearse
+ 09/19/22 01:19pm	The Staple	CORPUS	Tom Pearse
+ 11/01/22 10:43am	Cascade Nutrition	CORPUS	Tom Pearse
- 06/09/23 01:06pm	Example Site 1	CORPUS	House Account

**GEOCODE** Class: COMMERCIAL

**VALIDATE ADDRESS** Service Address:

2222 Navu Cir,  
Corpus Christi, TX 78411  
Nueces County

Billing Address:

1234 Navu Way,  
Corpus Christi, TX 78411

Contract Start Date:  
2023-06-07

[View Signed Agreement](#)

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.

New Customer/Site Service Changes Online On-Call Orders

DIVISION: CORPUS STATUS: All Open SOURCE: Service Add/Change LOB: Commercial, Docun  Show On Hold LOAD

SUBMITTED DATE	ACCOUNT	EFFECTIVE DATE	RATE CHANGE	REASON
- 06/09/23 1:06pm	Example Site 1 House Account 2222 Navu Cir, Corpus Christi PO# 123456	06/19/23	\$ 72.00	ADD-New Bus-From Competitor Service Contract CORPUS
New: 1 10 Yard Open Top Service On Call \$ 72.00 per month N/A				
Note: Delivery Date: 06/07/2023 Work Order: 2023-06-19 This is a note from the order processing screen.				

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.



<b>Effective Date</b>	Click on the date to open the field and select a new date. <i>*If the service effective date should match the work order delivery date, it is advisable to also update the Work Order Date accordingly.</i>
<b>Rate Change</b>	Select the underlined rate to update.
<b>Work Order</b>	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.

The screenshot shows the 'Online On-Call Orders' tab. At the top, there are three tabs: 'New Customer/Site', 'Service Changes', and 'Online On-Call Orders'. Below the tabs are several filters: 'DIVISION' (CORPUS), 'STATUS' (All Open), 'SOURCE' (Service Add/Change), and 'LOB' (Commercial, Docun). There is a 'Show On Hold' checkbox and a 'LOAD' button. The main table has columns for 'SUBMITTED DATE', 'ACCOUNT', and 'EFFECTIVE DATE'. A service entry is highlighted in green, showing '06/09/23 1:06pm House Account' and 'Example Site 1' with address '2222 Navu Cir, Corpus Christi' and 'PO# 123456'. Below the service details, there is a 'Note' section with 'Delivery Date: 06/07/2023' and 'Work Order: 2023-06-19 This is a note from the order processing screen.' A right-click context menu is open over the service entry, showing 'Put Hold' and 'Post' options. A red arrow points to the context menu with the text 'Right click'.

### 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.

New Customer/Site		Service Changes		Online On-Call Orders		
DIVISION	CORPUS	LOAD				
SITE ID	SITE NAME	ADDRESS	STATUS	WO#	CONTACT	SCHEDULED DATE
32010001	YOUNG LYNDA	1234 Navusoft ROAD GEORGE WEST, TX	Inactive	2710270		Fri 11/26/21
33227001	CARLOS LOPEZ	123 County Road222 ORANGE GROVE, TX	Active	2709059		Fri 11/26/21
32953023	CITY OF CORPUS CHRISTI	3456 Cascade STREET CORPUS CHRISTI, TX	Active	4292258		Tue 7/5/22

## 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.

UPDATE ACCOUNT CLASS	
<div style="display: flex; justify-content: space-between;"> <span>Details</span> <span>Portal / Payment Processing</span> </div>	
<p>Account Portal</p> <p>ENABLE PORTAL ACCESS <span>Yes</span></p> <p>ACCOUNT PORTAL HOME PAGE <span>Standard</span></p> <p>ENABLE ADD SITES <span>No</span></p> <p>NEW LOCATION TEMPLATE <span></span></p> <p>NEW LOCATION BUNDLE <span></span></p> <p><b>ENABLE ON CALL ORDERS <span>Yes</span></b></p> <p>ENABLE REPORT ACCESS <span>No</span></p> <p>ENABLE SERVICE PHOTO DISPLAY <span>Yes</span></p>	<p>Credit Card/ACH</p> <p>ENABLE ACCOUNT PORTAL PAY PROCESSING FEE <input checked="" type="checkbox"/></p> <p>ENABLE MANUAL PAY PROCESSING FEE <input checked="" type="checkbox"/></p> <p>ENABLE AUTO PAY PROCESSING FEE <input checked="" type="checkbox"/></p> <p>ENABLE ORDER PAY PROCESSING FEE <input checked="" type="checkbox"/></p> <p>DISABLE ADDING ACCOUNT PAYMENT METHOD <span>No</span></p> <p>CREDIT CARD PROCESSING FEE TYPE <span>%</span></p> <p>CREDIT CARD FEE AMOUNT <span>5</span></p> <p>CREDIT CARD PROCESSING FEE CHARGE CODE <span>Credit Card Fee</span></p> <p>ACH PROCESSING FEE TYPE <span>%</span></p> <p>ACH FEE AMOUNT <span>5</span></p>