

Edit Active Service - Logic Updates for When Equipment Type is Changed (15426) [Enhancement]

Last Modified on 07/24/2023 12:28 pm EDT

The following logic has been updated to Edit Active Service screen:

1. If the equipment type is changed for an active service, a removal work order is created for the old equipment and a delivery work order is created for the new equipment. Removal and Delivery selections are optional but are set to be enabled by default.

The following logic has been updated to the Service Changes tab in the Order Processing screen:

1. Screen has been updated to display both Removal and Delivery for an Equipment Type change.

The screenshot shows two parts of the software interface. The top part is the 'EDIT ACTIVE SERVICE' form, and the bottom part is the 'Service Changes' tab in the Order Processing screen.

EDIT ACTIVE SERVICE Form:

- REASON CODE: CHG-Price Increase
- START DATE: 07/28/23 Friday
- QTY: 1
- EQUIPMENT: 15 Yard Roll Off
- SERVICE CODE: 15 Yard Open Top Service
- FREQUENCY: On Call
- PER UNIT: 0.0000
- SERVICE FEES: 0.00
- RENT FREE DAYS: 0
- DAILY RATE: 0.00
- REQUESTED BY: [Empty]
- RO Removal:** (highlighted in red)
- ROUTE: [Empty]
- DATE: 07/28/23 Friday
- WORK ORDER NOTES: [Empty]
- RO Delivery:** (highlighted in red)
- ROUTE: [Empty]
- DATE: 07/28/23 Friday
- DELIVERY WORK ORDER NOTES: [Empty]

Service Changes Tab:

DIVISION	STATUS	SOURCE	LOB	Show On Hold
CORPUS	Processed (7 days)	Service Add/Change	Roll Off	<input checked="" type="checkbox"/>

SUBMITTED DATE	ACCOUNT	EFFECTIVE DATE	RATE CHANGE	REASON
07/24/23 8:33am John Doe	PLATINUM WRAPS - COR-4921 1234 Navusoft Way, CORPUS CHRISTI	07/01/23	\$ 0.00	ADD-Add Svc - New Service CORPUS
07/24/23 8:33am John Doe	PLATINUM WRAPS - COR-4921 1234 Navusoft Way, CORPUS CHRISTI	07/17/23	\$ 0.00	CHG-Price/Svc Correction CORPUS
07/24/23 11:09am House Account	Site 1 Test 22222 Aberdeen St NE, CORPUS CHRISTI	07/28/23	\$ 0.00	CHG-Price Increase CORPUS
Previous: 1	10 Yard Open Top Service	On Call	\$ 0.00 per month	N/A
New: 1	15 Yard Open Top Service	On Call	<u>\$ 0.00 per month</u>	N/A

Work Order Summary (highlighted in red):

- Delivery Work Order: 07/28/2023 WO Delivery Notes Added from Edit Active Service
- Removal Work Order: 07/28/2023 WO Removal Notes Added from Edit Active Service

Change Posted:
Date: 07/24/23 11:09am
By: Denise Roberts

Pathway: Accounts > Search: Account > (right click) Edit Active Service; Accounts > Order Processing > Service Changes (Tab)