Accounts (Contracts and Agreements) - Logic Update to Require Deposit Amount Field (14219)

Last Modified on 09/06/2023 10:39 am EDT

The "Require Deposit Amount" field on the Add Proposal screen has been renamed to "Payment Required at Customer Signature" and has been updated to include the following options:

- Not Required
 - Customer and Sales Rep can sign the contract without collection of a deposit.
- Specific Amount
 - Upon signing, the customer will be required to enter a payment using either a bank account or credit card.
- One Month Recurring Fees Including Taxes and Surcharges
 - System calculated based on the monthly service rate, and includes taxes and surcharges that apply.
- One Month Recurring Fees
 - System calculated based on the monthly service rate.

ADD PROPOSAL									
Settings Services	History	Attachment	Master Agreement						
ACCOUNT 41902 / Example Account 1									
DOCUMENT FORMAT Proposal SALES REP	SOLD BY	ELEC	STATUS Open TRONIC SIGNATURE	~	SOURCE	* (X)		?⊗	
House Account (House Accou v Aliena Somers (Adm TITLE PO NUMBER		BER (i) a (ii) a (iii) (iii)	ELECTRONIC SIGNATURE By signing below, you are (i) agreeing to the change in service described in the Service Agreement below, (ii) acknowledging receipt of the current Terms and Conditions accompanying the Service Agreement, and (iii) agreeing to be bound thereto.						
				PLEASE SELECT SIGNATURE METHOD Sign Type					
TERM		e NA			TTLE				
PRINT EST. SURCHARGE PRINT	EST. TAX	GROOP			-				
NOTE			AME						
		e		MAKE A PAYMENT					
DELIVERY INSTRUCTION			1	1 1 F		su	IBMIT CLEAR	CLOSE	
			1						
PAYMENT REQUIRED AT CUSTOM Not Required Not Required Specific Amount One Month Recurring Fees In		And Surcharges	/						
One Month Recurring Fees									