

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.

The screenshot shows the 'ADD PROPOSAL' interface. The 'PAYMENT REQUIRED AT CUSTOMER SIGNATURE' dropdown menu is highlighted with a red box and contains the following options: 'Not Required', 'Not Required', 'Specific Amount', 'One Month Recurring Fees Including Taxes And Surcharges', and 'One Month Recurring Fees'. A red arrow points from this dropdown to the 'PAYMENT REQUIRED' field in the 'ELECTRONIC SIGNATURE' modal, which currently shows '\$10.00'.