

Proposals/Quotes and Contracts - Field Logic Updates (14545) [Enhancement]

Last Modified on 09/15/2023 2:37 pm EDT

The following logic updates have been applied to the Reason and Competitor fields for 'Lost' proposals/contracts:

- Reason is hidden until "Lost" is selected from the Status drop down.
- The Reason field has been relocated to the left of the Competitor field.
- The Competitor field is hidden unless:
 - A specific value selected from the 'Reason' field where (Setup) Document Type > Reason Code has "Capture Competitor Info" set to 'Yes.'

EDIT SERVICE CONTRACT - SIGNATURE (NEW) - 3860

ACCOUNT 41902 / Example Account 1

DOCUMENT FORMAT: Service Contract - signature ()

DOCUMENT TYPE: Chg Svc-Price Increase ()

STATUS: Lost ()

SOURCE: Call In ()

REASON: Lost to Competitor ()

COMPETITOR: Waste Management ()

NOTE: ()

DATE: 09/15/2023 Fri ()

SALES REP: House Account (House Accou ()

SOLD BY: Aliena Somers (Admin-NS) ()

FORM CONTACT: ()

Linked Leads (0)

TITLE: ()

PO NUMBER: ()

EFFECTIVE DATE: 08/25/2023 ()

DELIVERY DATE: 08/25/2023 ()

ESTIMATED CLOSE DATE: 08/25/2023 ()

CLOSE PROBABILITY: Medium ()

TERM: 24 Months ()

RENEWAL TERM: 24 Months ()

Pathway: Accounts > Customer Service Screen > Orders, Quotes and Contracts