

Setup - Site Service Recurring Minimum Functionality Added (15844) [Enhancement]

Last Modified on 10/16/2023 4:30 pm EDT

To offer the availability of site service recurring minimum functionality, the following screens have been updated:

Line of Business

Pathway: Setup > Services > Line of Business

1. The Profitability section has been relocated to its own tab.
2. A new field "Recurring Minimum Charge Code" has been added and is limited to charge codes of the same Line of Business.

The screenshot shows the 'UPDATE LINE OF BUSINESS' form with the 'Profitability' tab selected. The form contains various fields for configuration. A red circle with the number '1' highlights the 'Profitability' tab. Another red circle with the number '2' highlights the 'RECURRING MINIMUM CHARGE CODE' field, which is set to 'Roll Off Service Minir'. The 'NAME' field is 'Roll Off' and 'ACTIVE' is 'Yes'. Other fields include 'SCREEN TYPE', 'GL SEGMENT', 'UNEARNED REVENUE GL ACCOUNT', 'WORK ORDER MINIMUM CHARGE CODE', 'OVER MAX WEIGHT CHARGE CODE', 'DENTAL CHARGE CODE', 'LIMIT CHARGE CODE TO MATCHING EQUIPMENT', 'LIMIT CHARGE CODE TO MATCHING MATERIAL', 'INVOICE SUMMARY DESCRIPTION', and 'PRODUCTIVITY UNIT NAME'. There are also several 'ENABLE' checkboxes for various features like 'ENABLE USED OIL COLLECTION', 'ENABLE PROACTIVE ROUTE STATUS DRIVER CHECK', etc.

Service Code

Pathway: Setup > Services > Service Code

- A new field "Enable Recurring Minimum" has been added to the Service Code tab and will only display if the Recurring Minimum Charge Code field in the line of business is populated.

UPDATE SERVICE CODE

Service Code | Surcharges | Divisions

SERVICE CODE	RO10T	ACTIVE	Yes
NAME	10 Yard Open Top Service	ENABLE ROUTING	Yes
LINE OF BUSINESS	Roll Off	REQUIRE FREQUENCY	Yes
EQUIPMENT TYPE	10 Yard Roll Off	ENABLE DRIVER UPDATE	No
MATERIAL TYPE		ENABLE ACCOUNT SIGNATURE	No
UOM	month	ENABLE DRIVER SIGNATURE	No
TAXABLE	Yes CLASS	ENABLE RECURRING MINIMUM	Yes
GL ACCOUNT	Service Income:Roll Off Service In	ENABLE WORK ORDER MINIMUM	No
PRORATION METHOD	Calendar Days - Start and End	ENABLE RENTAL FEE	Yes
BILL WHILE ON CREDIT HOLD	Yes	ENABLE DEFAULT DESTINATION	Yes
IS AP TRANSACTION	No	ENABLE NEGATIVE AMOUNT	No

Add/Edit Active Service

Pathway: Accounts (Customer Service screen) > Active Services section

- If the selected Service Code has the "Enable Recurring Minimum" option enabled, a "Minimum Per Month" field will appear on the Add/Edit Active Service screen.
- When a Minimum Per Month is applied to an active service, it will be visible when expanding the service code.

ADD ACTIVE SERVICE

REASON CODE: ADD-New Business | START DATE: 10/16/23 Monday | Week 42 (A)

QTY: 1 | EQUIPMENT: 10 Yard Roll Off | SERVICE CODE: 10 Yard Open Top Service | FREQUENCY: 1x per week | PER UNIT: 0.0000 | SERVICE FEES: 0.00 | month

MINIMUM PER MONTH

DISPLAY ALL LINE OF BUSINESS

SERVICE DAYS: Mon Tue Wed Thu Fri Sat Sun

REQUESTED BY: [Name]

SERVICE NOTE: [Text]

WORK ORDER: RO Deliver

ACTIVE SERVICES (4) | Standard | TOTAL RECURRING \$ 330.00

QTY	SERVICE CODE
1	10 Yard Open Top Service
1	10 Yard Trash Service
2	10 Yard Open Top Service
1	10 Yard Open Top Service

Recurring Minimum: \$ 85.00 per month | Reason: ADD-New Business | Posted By: Aliena Somers on 10/16/2023

CALENDAR | October, 2023 | EVENTS

SUN	MON	TUE	WED
Oct 1	Oct 2	Oct 3	
Oct 8	Oct 9	Oct 10	

Order Processing

Pathway: [Accounts > Order Processing](#)

- When a Recurring Minimum is applied to an active service, it will be visible when expanding the service changes for the account in Order Processing.

New Customer/Site		Service Changes		Online On-Call Orders	
DIVISION	STATUS	SOURCE	LOB	<input checked="" type="checkbox"/> Show On Hold	LOAD
All	All Open	Service Add/Change	Commercial, Docun		
SUBMITTED DATE	ACCOUNT				EFFECTIVE DATE ↓
+ 05/10/23 1:03pm Matt lori gmail Eck...					11/17/24
+ 07/14/22 11:19am House Acct non Sys...					07/19/24
+ 10/10/23 6:25pm House Account					10/01/23
- 09/29/23 5:42pm House Account	Roll Off Service Minimum Charge 1234 W Little York Rd, Houston				09/29/23
New: 1 10 Yard Open Top Minimum Charge 2x per week \$ 500.00 per month N/A					
Recurring Minimum: \$ 85.00 per month					
Note: Requested Days (TH T) Delivery Work Order: 09/29/2023					

Proposals/Contracts

Pathway: [Accounts \(Customer Service screen\) > Orders, Quotes and Contracts](#)

- If the selected Service Code has the "Enable Recurring Minimum" option enabled, a "Minimum Per Month" field will appear on the Add/Edit Service screen for the proposal/contract.
- When a Minimum Per Month is added, it will be visible upon expanding the service code for the proposal/contract.

ADD SERVICE

QTY: 1 | EQUIPMENT: 10 Yard Roll Off | SERVICE CODE: 10 Yard Open Top Service | FREQUENCY: 1x per week | PER UNIT: 0.0000 | SERVICE FEES: 0.00 | month | MINIMUM PER MONTH: 200.00

EDIT PROPOSAL - 3886

Settings | Services | History | Attachment | Master Agreement

MAP SERVICE LOCATIONS

SITE ID	START DATE	QTY	SERVICE CODE	FREQUENCY	RATE	VENDOR RATE
48969001		1	10 Yard Open Top Service	1x per week	\$ 0.00	month
Recurring Minimum: \$ 200.00 per month						
Total					\$ 0.00	\$ 0.00

Sales Management

Pathway: Sales > Sales Management

- If a contract includes a Recurring Minimum for a service, it will be visible on the Sales Management screen when the site is expanded.

SALES REP	AUTHORIZATION PENDING	CONTRACT REVIEW PENDING	CONTRACT REVIEW COMPLETE	COMMISSION REVIEW PENDING	EXCLUDED FROM COMMISSION	COMMISSION REVENUE	COMMISSION AMOUNT
House Account	\$ 0.00 2	\$ 192.00 2	\$ 0.00 0	\$ 34,598.0099 14,456	\$ 0.00 0	\$ 120.00 1	\$ 615.00 2
	\$ 0.00 0	\$ 244.50 3	\$ 0.00 0	\$ 5,650.73 156	\$ 0.00 0	\$ 0.00 0	\$ 0.00 0
	\$ 0.00	\$ 436.50	\$ 0.00	\$ 40,248.7399	\$ 0.00	\$ 120.00	\$ 615.00

Last Updated: 10/16 3:22 pm

EXPAND ALL | COLLAPSE ALL

SUBMITTED DATE	ACCOUNT	PROPOSAL #	EFFECTIVE DATE	TERM	RENEWAL	RATE	APPROVAL	SOLD BY
	Site 1 Test	3833	06/22/23	24	0	\$ 0.00		Aliena Somers View/Edit
	Staples Center	3886	10/16/23	12	12	\$ 0.00		Aliena Somers View/Edit

Guarantee Months: 0 | Increase Limit: 0%

A-New Service- 1 10 Yard Open Top Service (F)
PreAuth\NoAutoApprove

1x per week | \$ 0.00 per month | \$ 0.00 c/y

Recurring Minimum: \$ 200.00 per month

Signed proposal does not exist | Service Agreement not countersigned

REVIEWED ✓ | REJECT ✗

