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

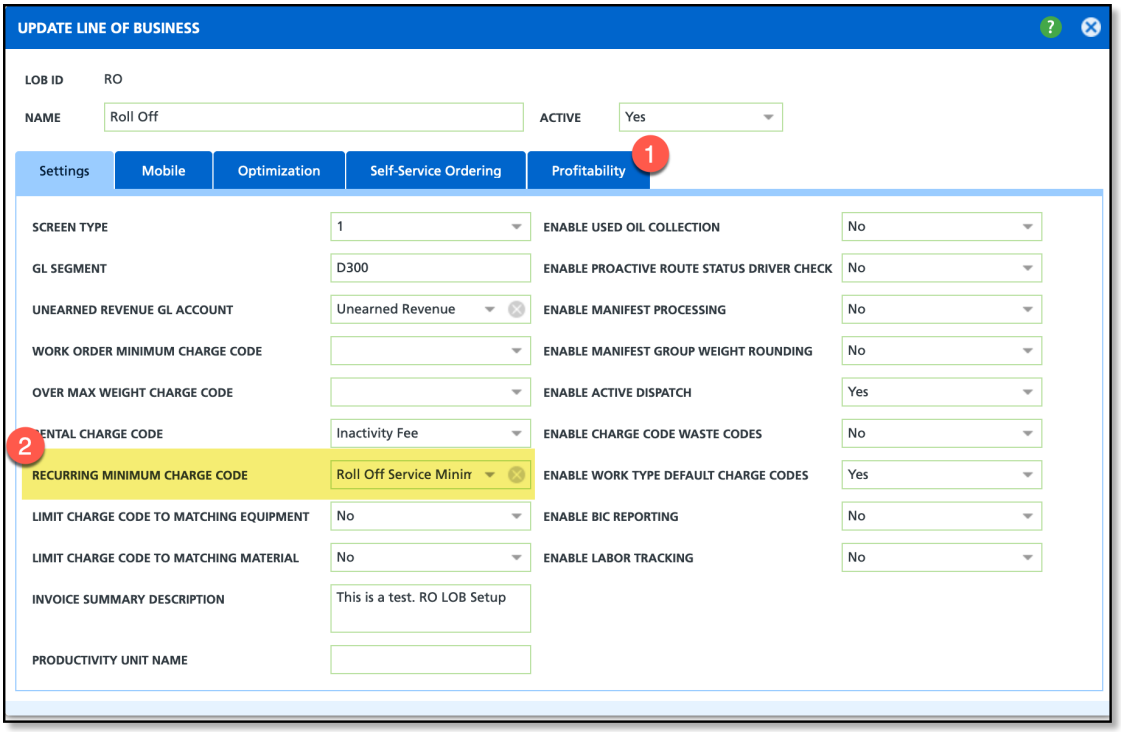
Last Modified on 10/16/2023 4:30 pm EDT

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*

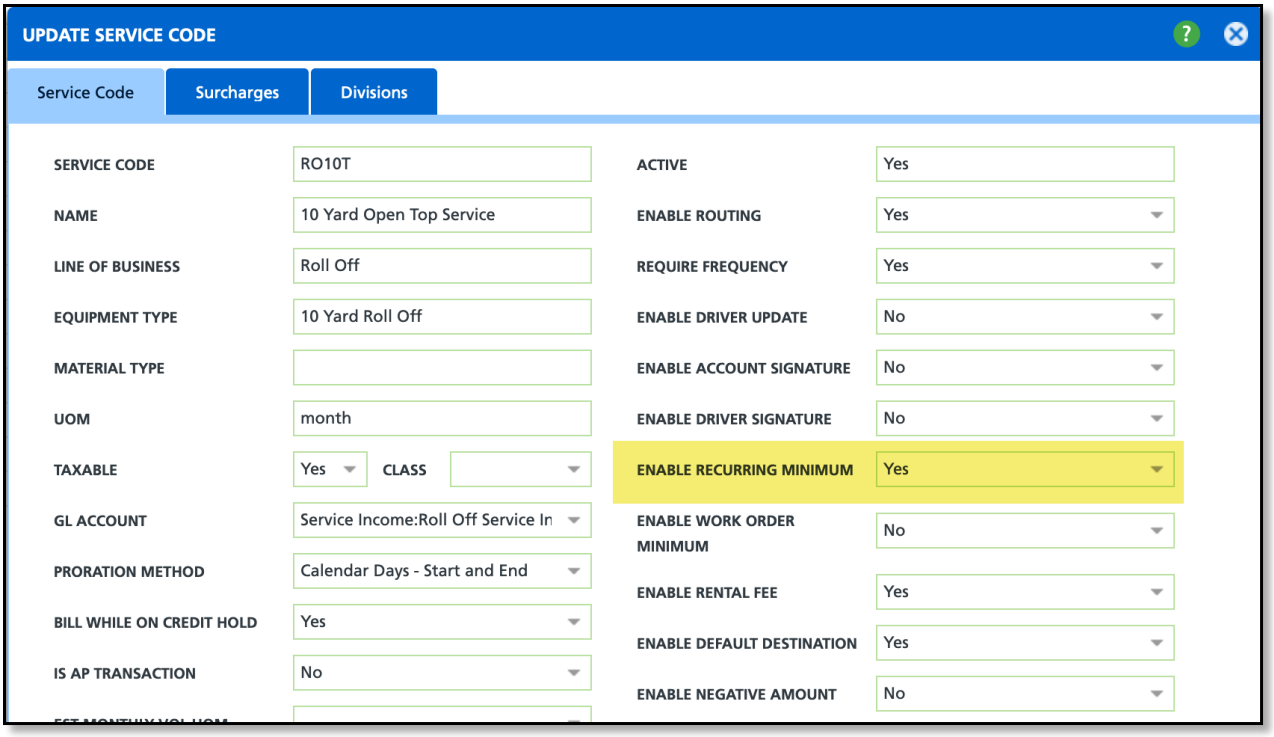
1. The Profitability section has been relocated to its own tab.
2. A new field "Recurring Minimum Charge Code" has been added and is limited to charge codes of the same Line of Business.



Service Code

Pathway: *Setup > Services > Service Code*

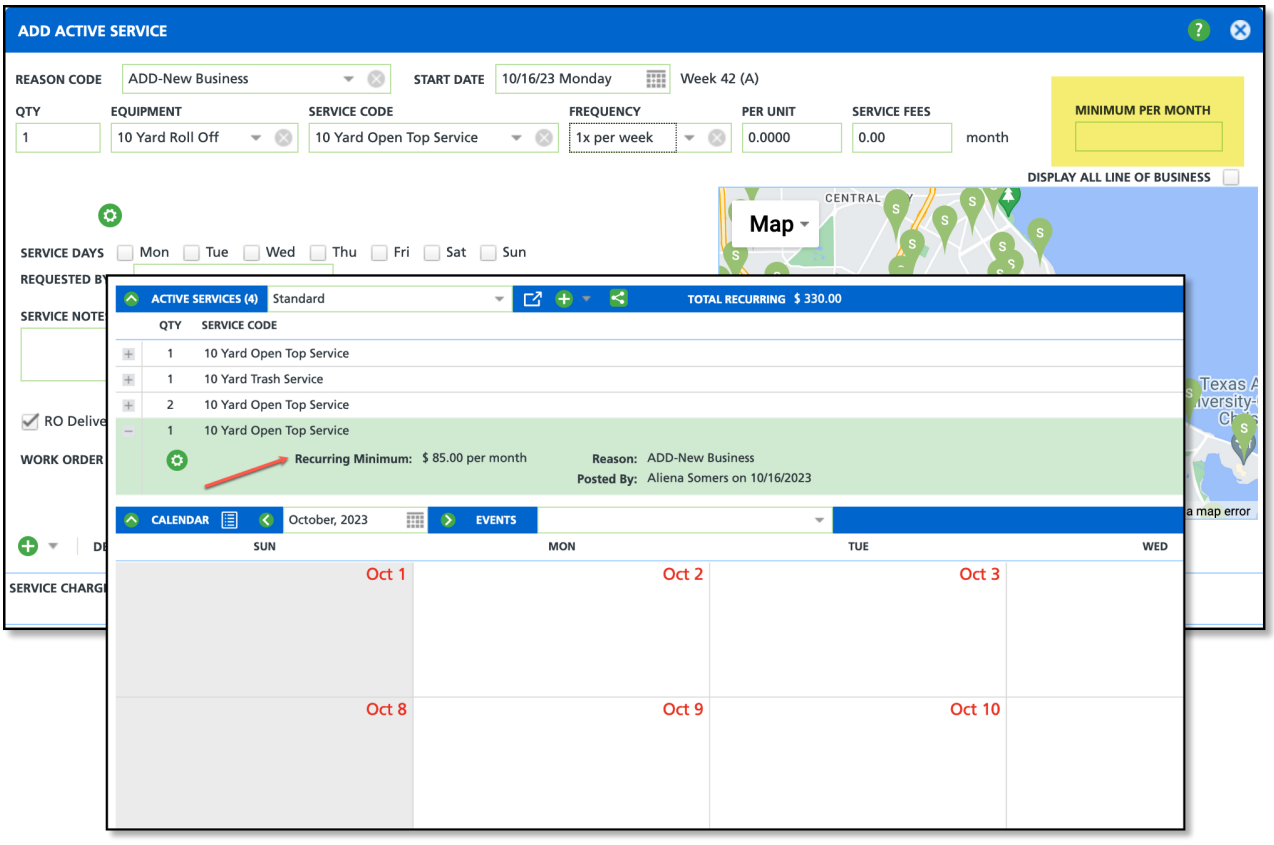
- A new field "Enable Recurring Minimum" has been added to the Service Code tab and will only display if the Recurring Minimum Charge Code field in the line of business is populated.



Add/Edit Active Service

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

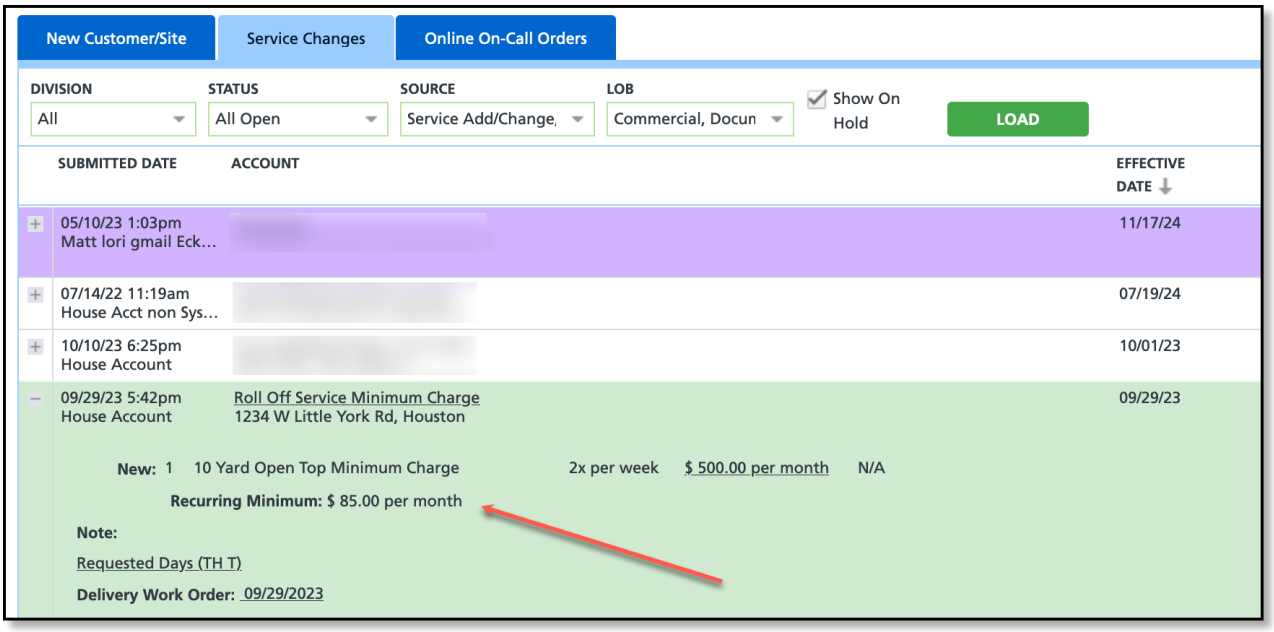
- If the selected Service Code has the "Enable Recurring Minimum" option enabled, a "Minimum Per Month" field will appear on the Add/Edit Active Service screen.
- When a Minimum Per Month is applied to an active service, it will be visible when expanding the service code.



Order Processing

Pathway: *Accounts > Order Processing*

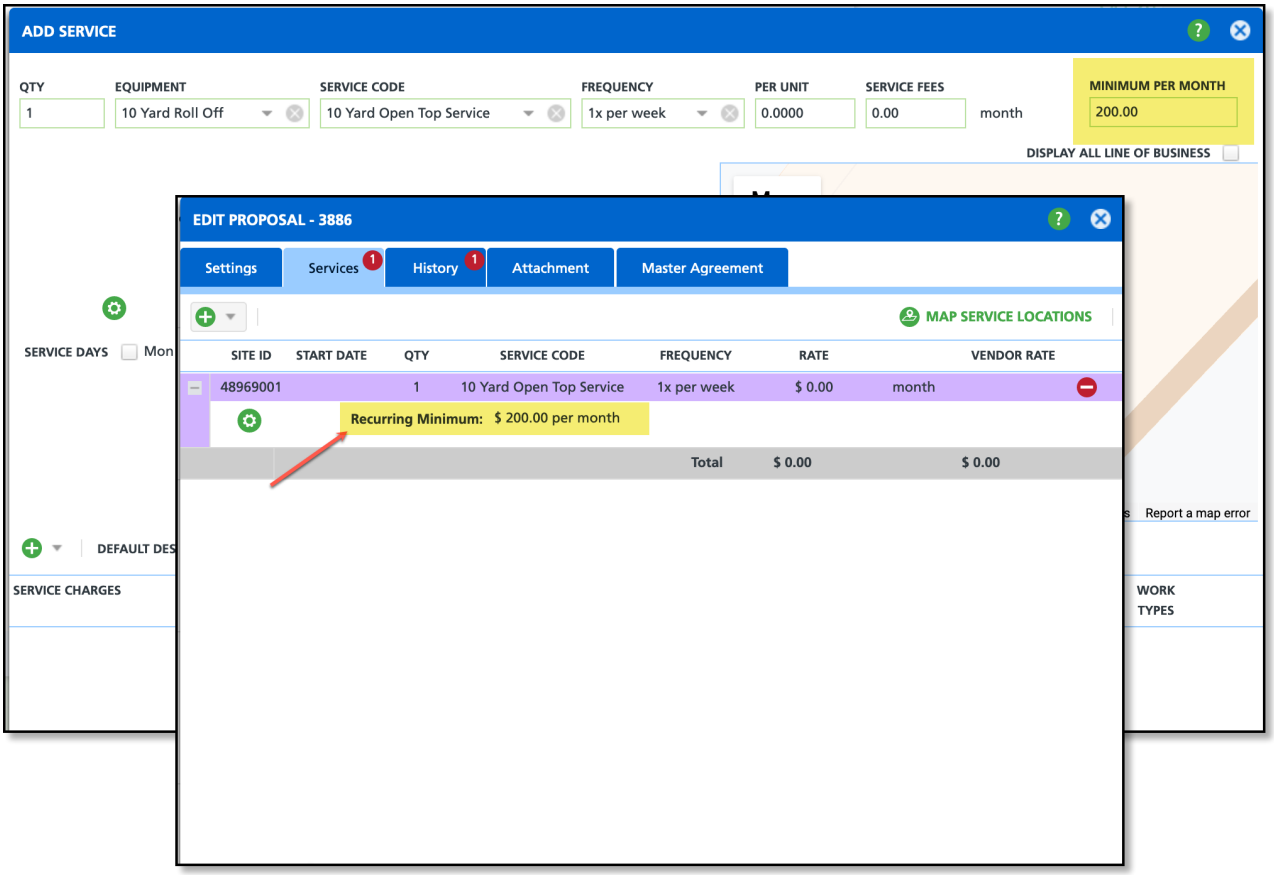
- When a Recurring Minimum is applied to an active service, it will be visible when expanding the service changes for the account in Order Processing.



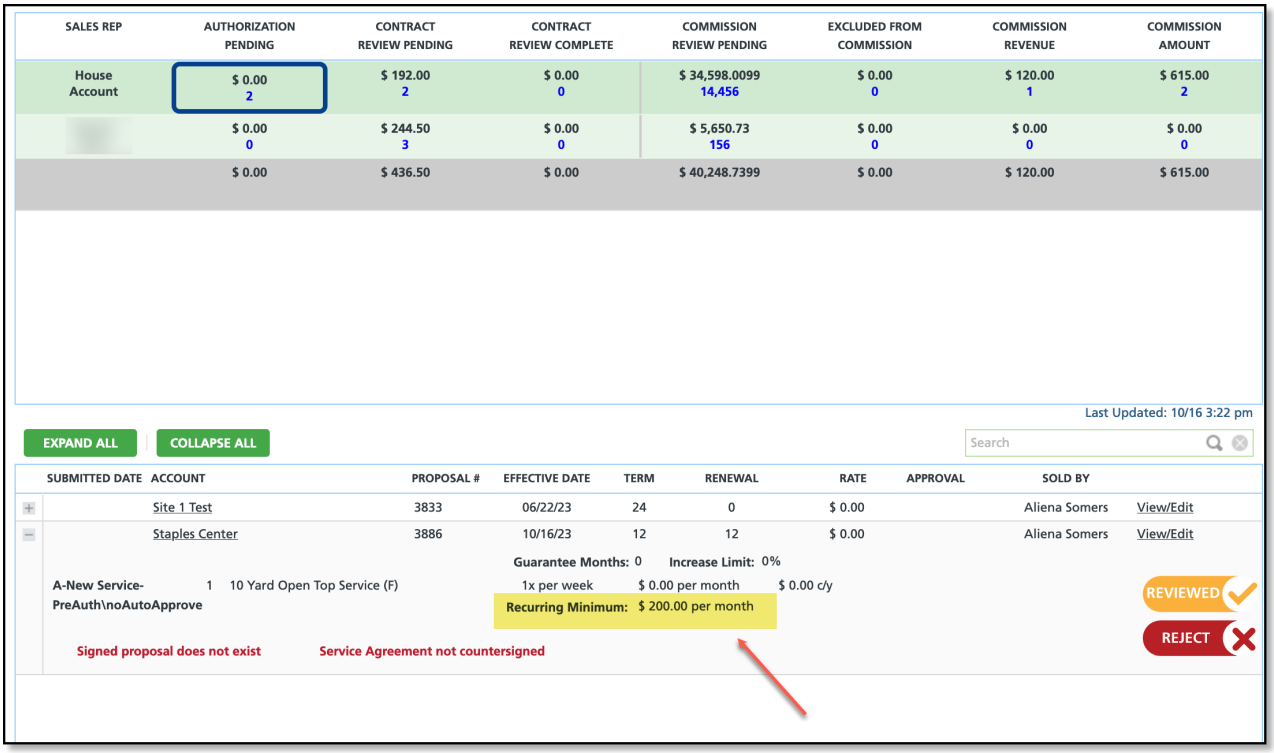
Proposals/Contracts

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.



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.