

Accounts - Transfer Service Option Relocated and Logic Updates (16063) [Enhancement]

Last Modified on 12/12/2023 10:11 am EST

A modification has been implemented to move the "Transfer Service" option from the customer service menu's list of choices to the "Active Services" section. To initiate a transfer, right-click on the relevant service and choose 'Transfer Service' from the menu.

Additionally, the following logic has been changed:

- The Transfer Service window will only load the service that was clicked on.
- The Transfer Service window will disable the 'Create Work Order', Route, Date and Work Order Notes fields of the service being transferred if Add/End is not available for the Work Type Event Class' work flow.
- In the Transfer Service window, the top 'Create Work Order' check box has been renamed to "Create Removal WO."
- In the Transfer Service window, the bottom 'Create Work Order' check box has been renamed to "Create Delivery WO."

The screenshot displays a software interface for account management. At the top, there are navigation icons and account information for 'CALALLEN ISD'. Below this, a table shows account balances for various periods (CURRENT, 1-30, 31-60, 61-90, 91-120, 120+, TOTAL). A 'HIGHLIGHTS' section contains a warning: 'Account is significantly past due'. The 'OPERATIONS' section shows 'ACTIVE SERVICES (5)' with a total recurring amount of \$1,681.00. A table lists services with columns for QTY, SERVICE CODE, SERVICE ID, FREQUENCY, SCHEDULE, and RATE. A context menu is open over the first row of services, listing options: Edit, Service has already been billed, Create On Call Order, Transfer Service (highlighted with a red arrow), View Billing History, View Change History, View Routing History, and View Service History.

Pathway: Accounts > Search > Accounts