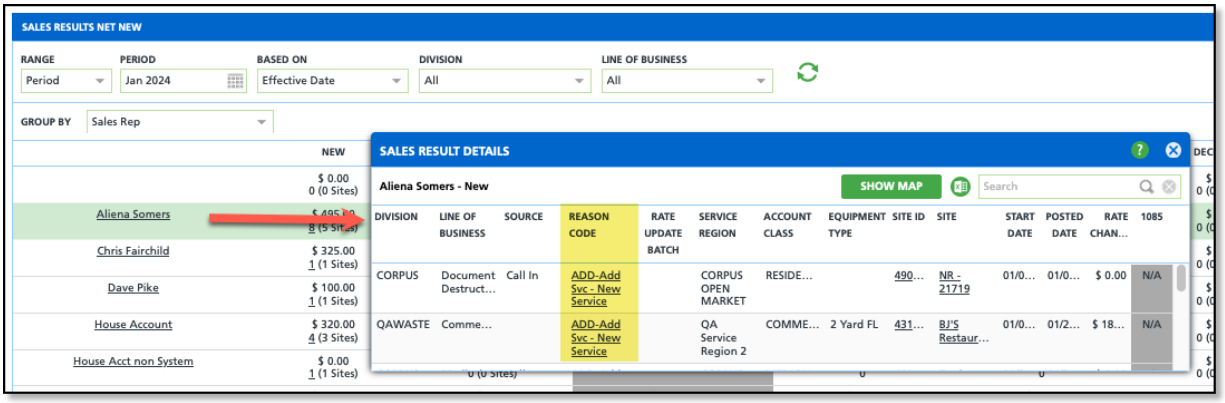
# Reports/Accounts - 'Sales Results Net New' Report and Rate History Screen Reason Code Updates (16310)

Last Modified on 02/09/2024 2:20 pm EST

## Sales Results Net New

**Pathway:** *Reports > Analysis > Sales Results Net New*

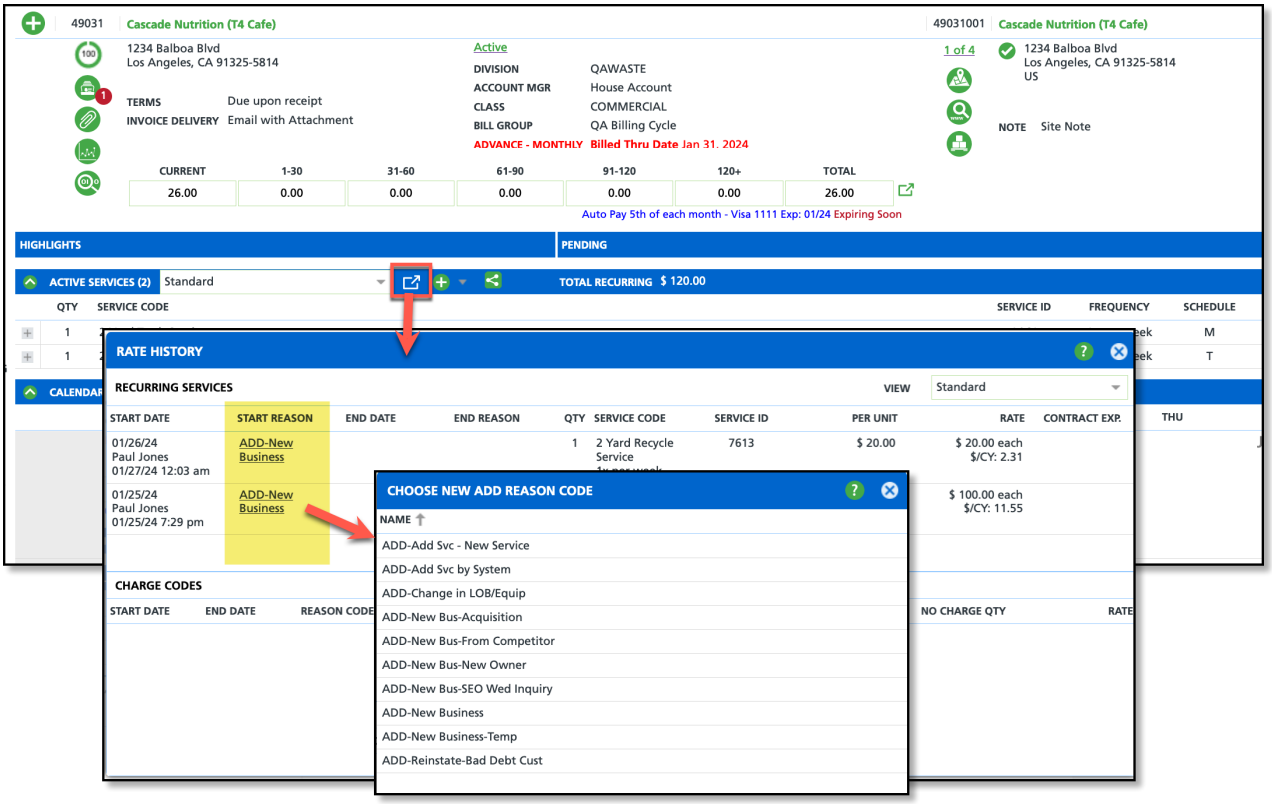
The Sales Results Net New screen has been updated to include a Reason Code column. If the user has permission 392 (Edit Reason Code in Sales Results and History), the reason code can be edited to another reason code of the same type.




## Rate History

**Pathway:** *Accounts > Customer Service Screen > Active Services Section*

Start/End Reason columns have been added to the Rate History screen in replacement of the Reason Code column. If the user has permission 392 (Edit Reason Code in Sales Results Net New and Rate History), the reason code can be edited to another reason code of the same type.


49031
Cascade Nutrition (T4 Cafe)
1234 Balboa Blvd
Los Angeles, CA 91325-5814
TERMS Due upon receipt
INVOICE DELIVERY Email with Attachment
Active
DIVISION QAWASTE
ACCOUNT MGR House Account
CLASS COMMERCIAL
BILL GROUP QA Billing Cycle
ADVANCE - MONTHLY Billed Thru Date Jan 31, 2024
CURRENT 1-30 31-60 61-90 91-120 120+ TOTAL
26.00 0.00 0.00 0.00 0.00 0.00 26.00
Auto Pay 5th of each month - Visa 1111 Exp: 01/24 Expiring Soon
49031001
Cascade Nutrition (T4 Cafe)
1 of 4
1234 Balboa Blvd
Los Angeles, CA 91325-5814
US
NOTE Site Note
HIGHLIGHTS
PENDING
ACTIVE SERVICES (2)
Standard
TOTAL RECURRING $ 120.00
QTY SERVICE CODE SERVICE ID FREQUENCY SCHEDULE
RATE HISTORY
RECURRING SERVICES
VIEW Standard
START DATE START REASON END DATE END REASON QTY SERVICE CODE SERVICE ID PER UNIT RATE CONTRACT EXP.
01/26/24 Paul Jones 01/27/24 12:03 am
ADD-New Business
1 2 Yard Recycle Service 7613 $ 20.00 $ 20.00 each $/CY: 2.31
01/25/24 Paul Jones 01/25/24 7:29 pm
ADD-New Business
$ 100.00 each $/CY: 11.55
CHARGE CODES
START DATE END DATE REASON CODE NO CHARGE QTY RATE
CHOOSE NEW ADD REASON CODE
NAME
ADD-Add Svc - New Service
ADD-Add Svc by System
ADD-Change in LOB/Equip
ADD-New Bus-Acquisition
ADD-New Bus-From Competitor
ADD-New Bus-New Owner
ADD-New Bus-SEO Wed Inquiry
ADD-New Business
ADD-New Business-Temp
ADD-Reinstate-Bad Debt Cust