

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.

RANGE	PERIOD	BASED ON	DIVISION	LINE OF BUSINESS
Period	Jan 2024	Effective Date	All	All

GROUP BY	NEW
Aliena Somers	\$ 0.00 0 (0 Sites)
Chris Fairchild	\$ 325.00 1 (1 Sites)
Dave Pike	\$ 100.00 1 (1 Sites)
House Account	\$ 320.00 4 (3 Sites)
House Acct non System	\$ 0.00 1 (1 Sites)

DIVISION	LINE OF BUSINESS	SOURCE	REASON CODE	RATE UPDATE BATCH	SERVICE REGION	ACCOUNT CLASS	EQUIPMENT TYPE	SITE ID	SITE	START DATE	POSTED DATE	RATE	1085
CORPUS	Document Destruct...	Call In	ADD-Add Svc - New Service		CORPUS OPEN MARKET	RESIDE...		490...	NR - 21719	01/0...	01/0...	\$ 0.00	N/A
QAWASTE	Comme...		ADD-Add Svc - New Service		QA Service Region 2	COMME...	2 Yard FL	431...	BJ'S Restaur...	01/0...	01/2...	\$ 18...	N/A

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) 49031001 Cascade Nutrition (T4 Cafe)

1234 Balboa Blvd Los Angeles, CA 91325-5814 **Active** 1 of 4 1234 Balboa Blvd Los Angeles, CA 91325-5814 US

TERMS Due upon receipt DIVISION QAWASTE ACCOUNT MGR House Account CLASS COMMERCIAL BILL GROUP QA Billing Cycle

INVOICE DELIVERY Email with Attachment **ADVANCE - MONTHLY Billed Thru Date Jan 31, 2024** NOTE Site Note

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

HIGHLIGHTS PENDING

ACTIVE SERVICES (2) Standard TOTAL RECURRING \$ 120.00

QTY	SERVICE CODE	SERVICE ID	FREQUENCY	SCHEDULE
1				M
1				T

RATE HISTORY

START DATE	START REASON	END DATE	END REASON	QTY	SERVICE CODE	SERVICE ID	PER UNIT	RATE	CONTRACT EXP.	THU
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		

RECURRING SERVICES VIEW Standard

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