

Edit Service Record (Accounts) - Switch Work Type on Service Records Option Available (16833) [New Feature]

Last Modified on 05/30/2024 5:04 pm EDT

Switch Work Type on Service Record

A green 'switch' button has been added to the Service Record screen, allowing users to switch work types for 'Scheduled' and 'On Call' services. This option is only available to work types that have 'Allow Switch to Work Type' enabled. Further information on setup is outlined in the section below.

The screenshot displays the 'EDIT SERVICE RECORD' form. At the top, the 'WORK TYPE' field is highlighted with a red box and contains the value 'RO_DUMPRET'. To the right of this field is a green circular icon with a white double-headed arrow, representing the 'switch' button. The form includes various input fields for 'ORDER NOTES', 'PO NUMBER', 'EXTERNAL ID', 'SCHEDULED DATE', 'ROUTE', 'SEQUENCE', 'DESTINATION / ORIGIN', 'WORK STATUS', 'EXCEPTION REASON', and 'POSTING STATUS'. A navigation bar at the bottom contains tabs for 'Charges \$ 480.00', 'Source Location', 'Disposal / Ship', 'Payments', 'Completion', 'Attachments', 'Labels', and 'Photos'. Below the navigation bar is a search field for 'Find existing source location' and a table with columns: 'LOCATION ID', 'NAME', 'ADDRESS', 'ADDRESS2', 'CITY, STATE, ZIP', 'PHONE', 'STATE ID', 'NOTE', and 'LINKED CHARGES'.

Enable 'Allow Switch to Work Type' in Work Type Event Class Setup

The Update Work Type Event Class Item popup editor now includes an "Allow Switch to Work Type" field, which appears when "On Call" or "Scheduled Services" is selected in the Event Type field. Enabling this field by selecting an option will display the Switch icon for the corresponding work type.

WORK TYPE EVENT CLASS SETUP SETUP > OPERATIONS > WORK TYPE EVENT CLASS

| ID | NAME | LINE OF BUSINESS | LINKED SERVICE CODES |
|------|--------------------------|----------------------|----------------------|
| 1000 | Roll off Services | Roll Off | 24 |
| 1001 | Front Load Services | Commercial | 26 |
| 1002 | Residential Services | Residential | 16 |
| 1004 | Residential - Hand Throw | Residential | 2 |
| 1005 | Landfill | Inbound and Outbound | 0 |
| 1006 | Medical Waste | Medical Waste | 2 |
| 1007 | Transfer | Medical Waste | 1 |
| 1008 | Scale IN | Scale | 1 |
| 1009 | Document Destruction | Document Destruction | 2 |
| 1010 | Hazardous Waste Ser | Material | 1 |
| 1011 | MISC | | 1 |
| 1012 | SCALE_OUT | | 1 |

UPDATE WORK TYPE EVENT CLASS ITEM

EVENT: Roll off Services

EVENT TYPE: Scheduled Service

WORK TYPE: RO Dump/Return

ALLOW SWITCH TO WORK TYPE: RO Swap

ALLOW SELF-SERVICE ORDERING: No

NOTE:

Available Actions

| EVENT CLASS | EVENT TYPE | LINKED SERVICE CODES | NOTE |
|-------------------|-------------------|----------------------|------|
| Roll off Services | On Call | | |
| Roll off Services | On Call | | |
| Roll off Services | Scheduled Service | | |
| Roll off Services | On Call | RO Swap | No |
| Roll off Services | Add Service | RO Delivery | No |
| Roll off Services | Quantity Increase | RO Delivery | No |
| Roll off Services | Quantity Decrease | RO Removal | No |
| Roll off Services | End Service | RO Removal | No |
| Roll off Services | On Call | RO Delivery | No |
| Roll off Services | On Call | RO Packer Repair | No |
| Roll off Services | Split Order | Dump Yard Box | No |

Pathway: Accounts > Search > Accounts; Setup > Operations > Work Type Event Class