

Orders, Quotes and Contracts (Accounts) - Logic Updated to Multi-Site Proposals (17581)

Last Modified on 12/16/2024 12:25 pm PST

The logic for proposals with multiple sites has been updated. Proposals and contracts that include more than one site will now be visible on all associated sites, not just the primary site.

The screenshot displays a software interface for account management. At the top, two sites are listed: '48969 Staples Center' and '48969002 1111 Site 2 - Clone Example'. Below the site information, there are fields for 'Active', 'DIVISION', 'ACCOUNT MGR', 'CLASS', and 'BILL GROUP'. A summary table shows financial data across various periods (CURRENT, 1-30, 31-60, 61-90, 91-120, 120+, TOTAL) with values like -67.99 and 0.00. A 'PENDING' section lists items like 'Credit Request' and 'Proposal'. At the bottom, a table titled 'ORDERS, QUOTES, AND CONTRACTS (2)' lists items with columns for ID, START DATE, EST. CLOSE DATE, FORMAT, STATUS, MONTHLY REVENUE, SALES REP, TITLE, and AUTH/APPROVAL.

ID	START DATE	EST. CLOSE DATE	FORMAT	STATUS	MONTHLY REVENUE	SALES REP	TITLE	AUTH/APPROVAL
4107	12/09/24	12/09/24 Medium	Proposal A-New Business-Ac...	Open	\$ 1,166.00	House Account - Hou... - DO NOT USE (Admin)		
4114	12/16/24	12/16/24 Medium	Proposal A-New Service	Open	\$ 418.20	House Account - Hou... - DO NOT USE (Admin)		

Pathway: Accounts > Orders, Quotes, and Contracts