

Orders, Quotes, and Contracts (Accounts) - Add / Edit Document Modal Must Be Closed (22078)

Last Modified on 08/05/2026 7:46 am PDT

When opening the **Document** modal to add or edit an Order, Quote, or Contract from the *Customer Service* screen, you must now close the modal before navigating away or taking any other action in the application

The screenshot shows the 'EDIT DOCUMENT' modal for 'SERVICE CONTRACT 4352'. The modal is overlaid on a background screen showing account details for 'Kids Meal' (59965) and 'Kids Meal' (59965001). The modal has a blue header with the title 'EDIT DOCUMENT' and a close button (X) in the top right corner, which is highlighted by a red arrow. The modal contains various fields for document details, including document format, document type, status, source, sales rep, sold by, form contact, title, po number, effective date, delivery date, estimated close date, close probability, term, renewal term, rate guarantee (months), print est. surcharge, print est. tax, group method, multiple start dates, print est. wo charges, note, delivery instruction, payment required at customer signature, and custom field1 text. The modal also has tabs for Settings, Services, History, Attachment, Master Agreement, Term Addendums, and Surcharge Rates. The background screen shows account details for 'Kids Meal' (59965) and 'Kids Meal' (59965001), including address, division, account mgr, class, bill group, terms, invoice delivery, and a table of current and future dates. The background screen also has a sidebar with navigation options like 'ACTIVE SERVICES (3)', 'CALENDAR', 'ORDERS, QUOTES, AND CONTRACTS (3)', and 'SERVICE HISTORY'.

ID	START DATE	EST. CLOSE DATE	Ser
4351	06/26/26	06/26/26	Low
4352	06/26/26	06/26/26	Medium
4451	08/05/26	08/05/26	Medium

Pathway: *Customer Service* > Add / Edit Document