

# Transfer Services

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Pathway: Accounts > (search Account) > Transfer Services

The Transfer Services tool is available in the Active Services section and is used to transfer the services to from one site to another. Because transferring services may require the removal and delivery of equipment, this tool includes the option to create a work order and assign the removal/delivery service to a route. After services have been transferred, they will display under Active Services for the new site.

The screenshot displays the Navusoft Premier Waste And Recycling account interface. The account details for 41898 are shown, including the address 8100 Washington Ave, Houston, TX 77007-1062, and the account manager DAYTON. The account is active and has a balance of \$956.87. The 'ACTIVE SERVICES (3)' section lists three services: 30 Yard Compactor Service, 2 Yard Trash Service, and 30 Yard Open Top Service. A right-click menu is open over the 30 Yard Compactor Service, with the 'Transfer Service' option highlighted. The 'TRANSFER SERVICE' dialog box is shown, allowing the user to select a 'TO' site (41898001) and specify the 'END SERVICES ON SITE' and 'START SERVICES ON SITE' dates and reasons. The dialog also includes options to 'Create Removal WO' and 'Create Delivery WO', and a 'PROCESS TRANSFER' button.

## Permissions

The following permissions are required to use the Transfer Services tool:

Permission ID	Permission Name
5	View Account

6	View Site
407	Transfer Services

## Field Descriptions

Field	Description
From	Displays details of the site services are being transferred from.
Qty	Indicates the quantity for the service code.
Service Code	Indicates the type of service available for transfer to another site.
Frequency	Indicates the frequency the current site is serviced.
Schedule	Displays the days current site is serviced.
Rate	The current rate for the service.
Billed Thru	If the service has already been billed on an invoice, the date the service is billed through displays.
New Rate	Option to apply a new rate for the service for the transfer site.
Start Date	The date services will start at the new site.
End Date	The date services will end at the current site.
Reason Code	Identifies the start and end reasons why service is being changed.
Create Removal WO	Creates a removal work order for the site service is being transferred from.
Create Delivery WO	Creates a delivery work order for the site the service is being transferred to.
Route	The route the equipment removal or delivery will be placed on.
Date	The date the equipment is scheduled to be removed or delivered.
Work Order Notes	Add notes to the Work Order for details on pick up and drop off information.

## Transfer a Service to Another Site

1. Open the site services will be transferred from.
2. Right click on the active service in the **Active Services** section and select 'Transfer Services' from the list.
3. Select the **Search** icon to search for the account services will be transferred to. This will open the Transfer Site Search. Enter the name of the site in the search field and select search.
4. Choose the **name** of the site from the search results to which the service is being transferred. This action will

populate the site in the Transfer Service screen and close the Transfer Site Search window.

5. Enter the **End Date** for when services at the existing site will end.
  6. Select a **Reason Code** for the service being ended.
  7. Review and complete the following optional fields:
    - Check the '*Create Removal WO*' check box if a work order is needed for equipment removal.
    - Route - Select a route from the list of options for the equipment removal to be added to.
    - Date - Enter the date the equipment will be removed.
    - Work Order Notes - Add any notes the driver will need for equipment removal.
  8. Enter a **Start Date** for when services will begin at the new site.
  9. Select a **Reason Code** for the service at the new site.
  10. Review and complete the following optional fields:
    - Check the '*Create Delivery WO*' check box to create a work order if equipment will be delivered.
    - Route - Select a route from the list of options for the equipment delivery to be added to.
    - Date - Enter the date for delivery.
    - Work Order Notes - Add any notes the driver will need when delivering the equipment.
  11. Select **Process Transfer**.
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