Add New Active Service

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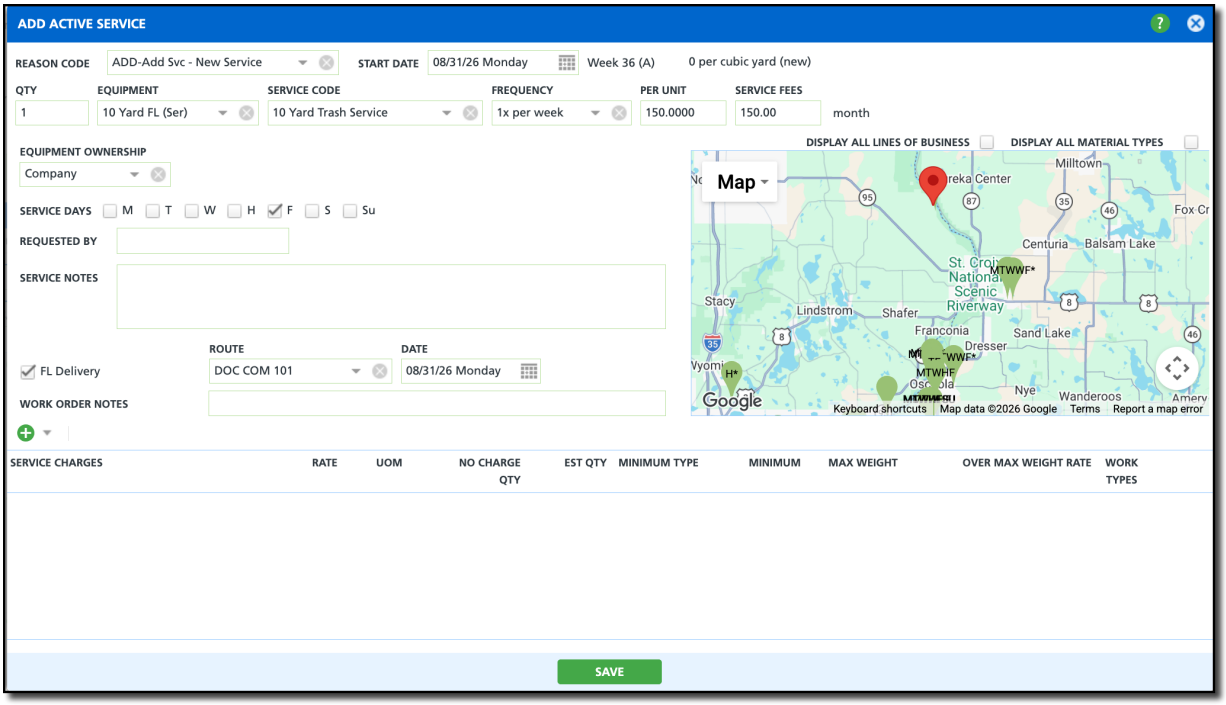
Pathway: *Customer > Search > Accounts*

The **Add Active Service** screen can be accessed from three locations when viewing an account, as detailed in the sections below. This screen contains the information needed to add a scheduled service to a site, including service dates and applicable fees.

Once added, the service will appear in the **Active Services** section of the **Customer Details** screen, where it can be expanded to review the service details.



Permissions

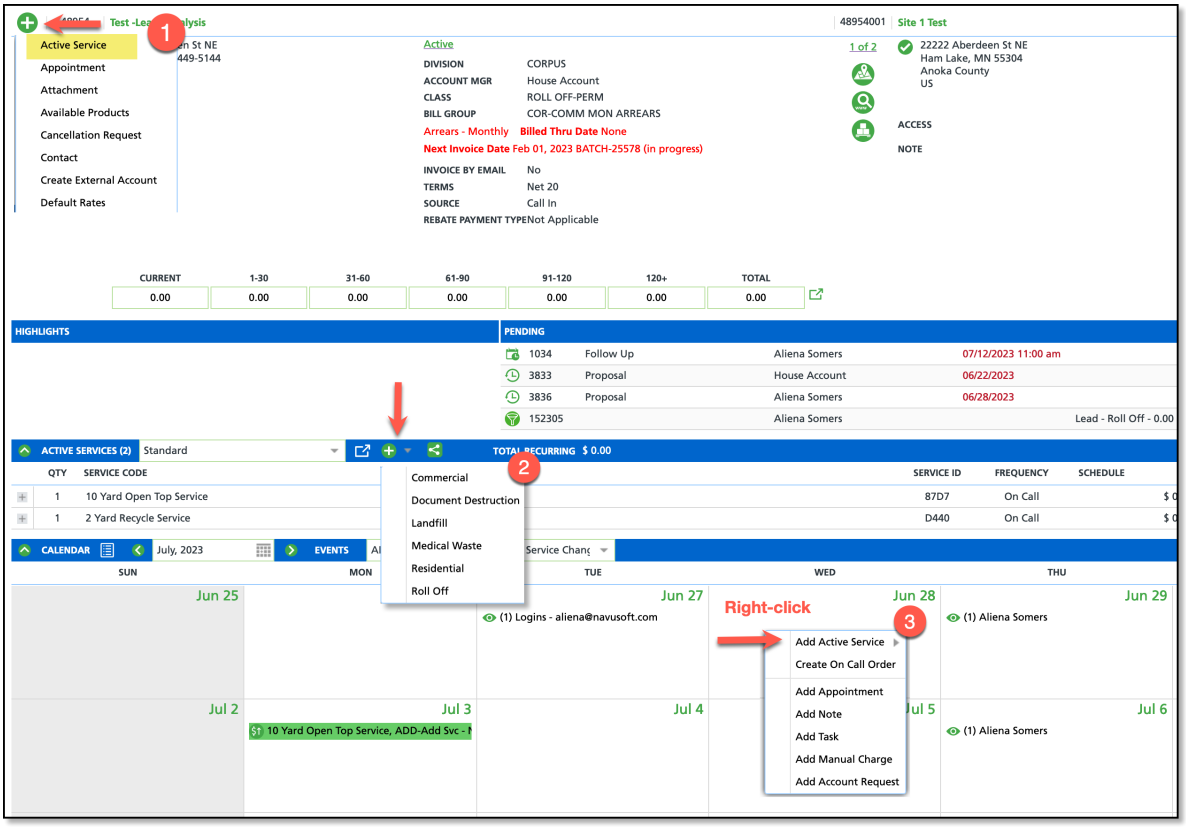
The following permissions apply to adding and editing active services:

Permission ID	Permission Name
3	View Account
4	View Site
70	Add Active Service To Active Account
71	Edit Active Service
73	Add Active Service

Screen Locations to Add Active Service

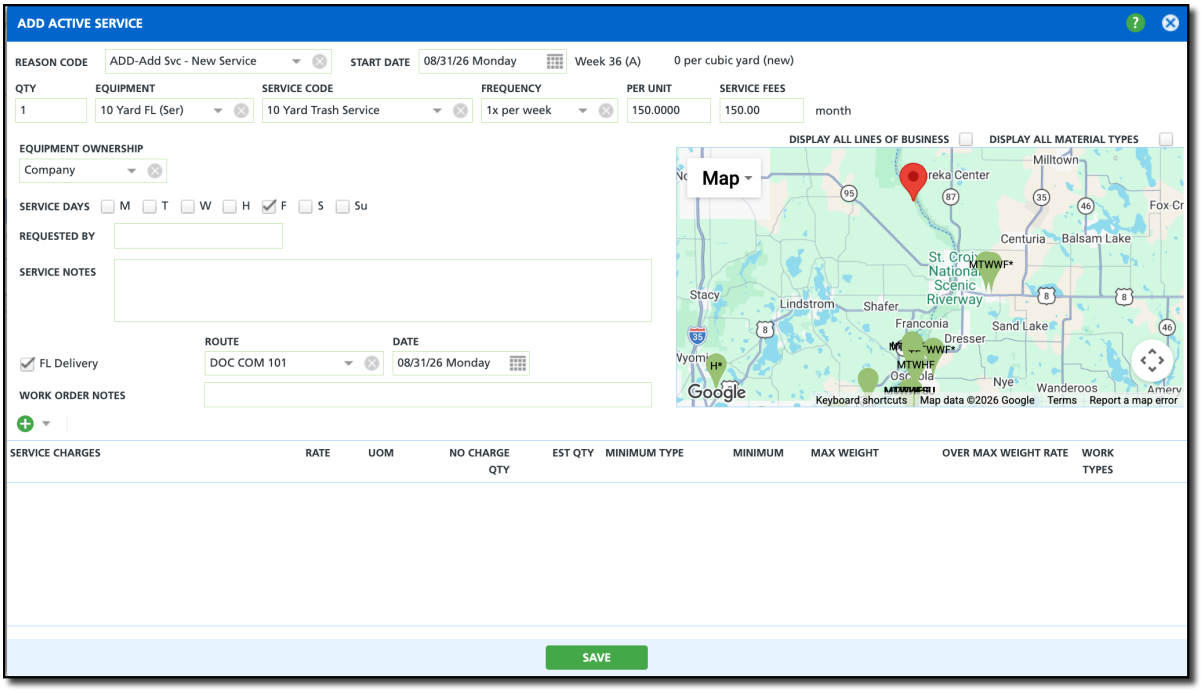
The Customer Service screen provides three methods to add an active service to a site that include:

1. Account Menu drop down
2. Active Services tool bar
3. Calendar display



Add Active Service

Using one of the options shown above, open the *Add Active Service* screen to begin the process of adding a service to a site.



Add Active Service Field Descriptions

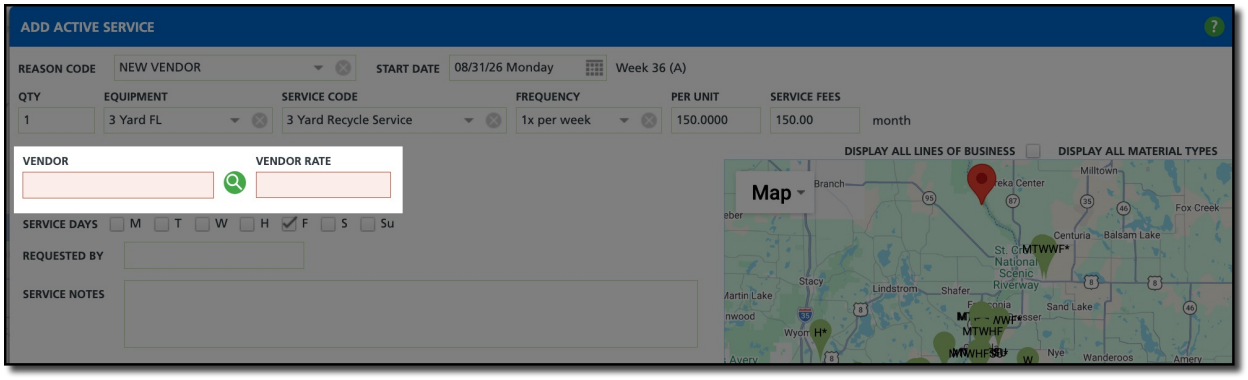
Field	Description

Reason Code	Identifies the reason the service is being added and provides a record of how services are acquired.
Start Date	Identifies the date the service is requested or contracted to start.
QTY	Indicates the amount of equipment the service requires. Also used in the SVC Fees calculation if a Per Unit rate is entered.
Equipment	Indicates the type of equipment being used. The selection here determines what is available for selection in the Service Code field.
Service Code	Specifies the type of service to be provided based on the selected equipment type.
Frequency	Identifies how often the site will be serviced. An additional 'Service Days' field displays for frequencies scheduled on a repetitive basis vs. on-call. • If 'On Call' is selected the Service Days and Week of Month fields are hidden. • If a weekly or monthly option is selected, additional *Service Days* and *Week of Month* fields display in the editor.
Per Unit	The per unit rate charged for the service. Used in the SVC Fees calculation. QTY x PER UNIT = SVC FEES
SVC Fees	SVC Fees are calculated as *QTY x Per Unit*.
Service Days	Indicates the preferred days the customer would like servicing to happen. Service Days does not display if On-Call is selected in the Frequency field. **Default selection logic:** Selection boxes will default to days based on nearby sites within a 5-mile radius. This logic considers service frequency and line of business, with default selections applied for frequencies of 1x and 2x only.
Rent Free Days	Option to provide a set amount of days the customer will not be charged a daily rental fee.
Daily Rate	Option to charge a daily rental fee for the equipment sitting at a site.
Requested By	Typically the name of the person who signed the contract approving the service.
Service Notes	Option to add **Service Notes** the driver should see each time the location is serviced.
Delivery	Indicates a container must be delivered to the location. The name for this field varies depending on the equipment type. When selected, a delivery work order is automatically created. *If the Add/Edit Active Service screen includes an 'Equipment Ownership' field (applies to certain setups), the delivery and removal workflows will be hidden if 'Company' is not selected, as the company is not responsible for delivery or removal of equipment.*

Route	Identifies the route the service will be placed on. In many cases a 'TBD' route may be selected to allow for the Operations team to determine the best route placement.
Date	If equipment is being delivered, enter the requested delivery date into the **Date** field.
Work Order Notes	Option to enter a one-time **Work Order Note** for the driver. *Example: "Place the container on the south side of the building."*
Map	
Display All Lines of Business Check Box	Select to include all other lines of business in the map's display. Leave unchecked to see only locations that are the same line of business as the service being added.
Display All Material Types Check Box	Select to display all stops near the added service, regardless of **Material Type**. Leave unchecked to display only nearby stops with matching **Material Type** as the new service. At the Line of Business level (Settings tab): • If **Match Material Type When Suggesting Or Automatically Assigning Routes**, is set to **Yes**, the check box is not checked and the map will default to showing only stops with matching material. • If **Match Material Type When Suggesting Or Automatically Assigning Routes**, is set to **No**, the check box is checked and the map will default to showing all stops regardless of material type.
Map/Satellite	Toggle between a map or satellite view of the locations.
Location Pins	Displays each service location as a pin on the map. Hover over the pin of a location to view the location's address information.

Vendor Specific Fields

When both the selected reason code and service code have vendor enabled, **Vendor**, **Vendor Lookup** and **Vendor Rate** fields will display on the Add / Edit Service screens. Reference Enable Vendor (Setup) to learn more about setting up vendors and the services they can be used for.



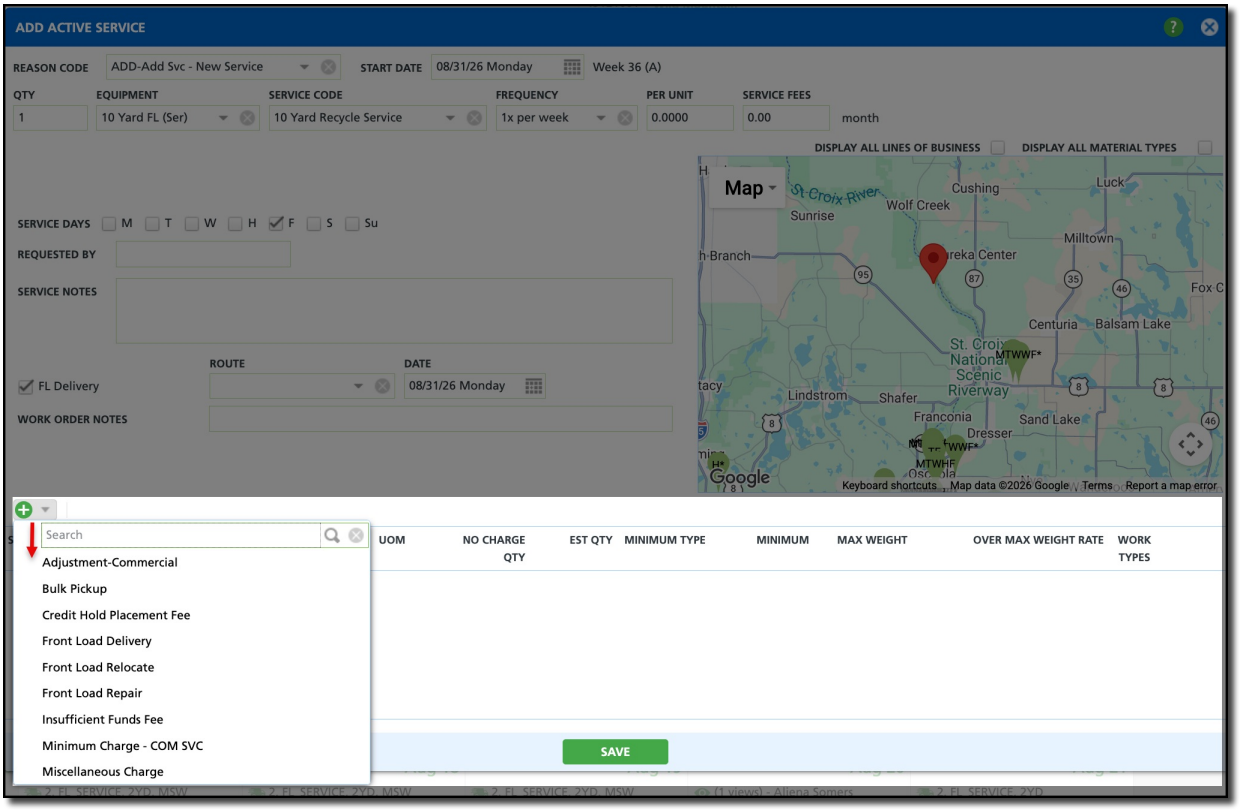
Vendor Specific Field	Field Description
Vendor	The name of the Vendor selected from the Vendor Search. This is the vendor that will provide the service.
Vendor Search	Click on the magnifying glass icon to open the *Vendor Search* screen. From there, select a vendor.
VendorRate	The amount that the Vendor selected is to be paid for providing the service.

Add a New Service

1. Select the Reason Code that applies to the service being created.
2. Enter a **Start Date** for service to begin.
3. Enter the amount of equipment the service includes in the **QTY** field.
4. Select the equipment type from the **Equipment** drop down.
5. Select a **Service Code**. Service code options are limited based on the equipment selected.
6. Select the schedule **Frequency** the site will be serviced.
    - If any option other than On Call is selected, the Service Days check boxes will display to select the customer's preferred servicing day(s).
7. Enter the **Per Unit** rate. The value entered here will be multiplied against the **QTY** to calculate the **Service Fees.**
8. If the reason code and service codes are vendor-enabled, select a **Vendor** using the **Vendor Search** and enter the **Vendor Rate**.
9. Complete additional fields based on the needs of the site being serviced.

Add Service Charges

Add additional charges that are applicable to the service in the Service Charges section.



Field Descriptions

Field	Description
Service Charges	This is a list of charges that can be applied to the service, including delivery or removal charges. The service charges listed here serve as a reference for billing purposes and for communicating the applicable rates to the customer.
Rate	The rate that applies for the service charge. Select within the rate field to enter the rate amount.
UOM	The unit of measure that is used in rate and quantity calculations. Example: $30 (rate) per ton (UOM).
No Charge Qty	A quantity amount that will not be charged for.
Est Qty	The estimated number of units expected to be serviced for Scheduled or On Call Work Orders. This field is displayed if **Enable Work Order Estimated Quantity** is set to **Yes** for the Line of Business (Settings tab).
Minimum Type	To apply a minimum to a service charge, **Enable Minimum** must be enabled on the applicable Charge Code. When enabled, the **Minimum Type** and **Minimum** fields are available when adding or editing an Active Service. **Minimum Type** is used to determine how the minimum is applied. Options include: • **None** - No minimum is applied to the service charge. • **Amount** - Sets a minimum dollar amount that must be charged for the service. If the calculated service charge is less than the specified minimum amount, the minimum charge applies. • **Quantity** - Sets the minimum quantity that must be billed for the service. If the recorded quantity is less than the specified minimum quantity, the minimum quantity is used to calculate the service charge.
Minimum	To apply a minimum to a service charge, **Enable Minimum** must be enabled on the applicable Charge Code. When enabled, the **Minimum Type** and **Minimum** fields are available when adding or editing an Active Service. The **Minimum** field is used to enter the applicable minimum value that Billing will use when the service is billed.
Est Qty	The estimated quantity expected for the service. Note: For this to be used when adding or modifying an active service, the **Enable Est. Charge Quantity** setting for the charge code should be enabled on the Settings > Services > Charge Code screen, and the user must have permission **336 (Edit Charge Code Rate for Work Order)**.
Max Weight	For weight rated charges, establishes the maximum weight for the charge.
Over Max Weight Rate	The rate that applies if the max weight is exceeded.
Work Types	The work types the service charge applies to (Delivery, Removal, Relocate, etc.)

1. Select the **green ' + '** icon to open the list of available service charges.
2. Select the **charge code** that applies to the service.
3. Repeat steps 1 and 2 until all necessary charge codes have been added to the service.
4. Click within the **Rate** column of each service charge and enter a rate.
5. Click within the **No Charge QTY** field to apply a threshold that will prevent the rate from being applied for amounts at or below the value entered.

Related Articles

Active Services Overview
End and Edit Active Services
Schedule an On Call Order