

# Add New Active Service

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**Pathway:** *Customer > Search > Accounts*

Add an active service to a site using the 'Add Active Service' pop-up editor. After a service has been added it will display in the Active Services section on the Customer Details screen where it can be expanded and reviewed.

SERVICE CHARGES	RATE	UOM	NO CHARGE QTY	EST QTY	MINIMUM TYPE	MINIMUM	MAX WEIGHT	OVER MAX WEIGHT RATE	WORK TYPES
Front Lo...	\$ 0.00	each	0		None				1

## 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

The screenshot displays a software interface for account management. At the top, account details for 'Test-Lea... Analysis' are shown, including address, division, and account manager. A sidebar on the left contains navigation options like 'Active Service' and 'Appointment'. Below this is a summary table with columns for 'CURRENT', '1-30', '31-60', '61-90', '91-120', '120+', and 'TOTAL', all showing '0.00'. A 'HIGHLIGHTS' section lists pending tasks like 'Follow Up' and 'Proposal'. A central section shows 'ACTIVE SERVICES (2)' with a dropdown menu open, listing options like 'Commercial', 'Document Destruction', 'Landfill', 'Medical Waste', 'Residential', and 'Roll Off'. A calendar view below shows dates from June 25 to July 6. A right-click context menu is open over the calendar, with 'Add Active Service' highlighted. Red annotations include a '1' near the account name, a '2' near the service dropdown, and a '3' near the 'Add Active Service' menu item.

## 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.

The 'ADD ACTIVE SERVICE' screen contains the following fields and options:

- REASON CODE:** ADD-New Business
- START DATE:** 07/19/23 Wednesday (Week 29 (B))
- QTY:** 1
- EQUIPMENT:** 15 Yard Roll Off
- SERVICE CODE:** 15 Yard Open Top Service
- FREQUENCY:** Monthly
- PER UNIT:** 0.0000
- SERVICE FEES:** 0.00 month
- SERVICE DAYS:** Mon, Tue, Wed, Thu, Fri, Sat, Sun (all unchecked)
- WEEK OF MONTH:** Second
- REQUESTED BY:** (empty field)
- SERVICE NOTES:** (empty text area)
- ROUTE:** (empty dropdown)
- DATE:** 07/19/23 Wednesda
- RO Delivery:** (checked checkbox)
- WORK ORDER NOTES:** (empty text area)
- Map:** A map showing the location at the intersection of Aberdeen St NE and another street.
- SAVE:** A green button at the bottom center.

## Add Active Service Field Descriptions

Field	Description
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<b>Reason Code</b>	Identifies the reason the service is being added and provides a record of how services are acquired.
<b>Start Date</b>	Identifies the date the service is requested or contracted to start.
<b>QTY</b>	Indicates the amount of equipment the service requires. Also used in the SVC Fees calculation if a Per Unit rate is entered.
<b>Equipment</b>	Indicates the type of equipment being used. The selection here determines what is available for selection in the Service Code field.
<b>Service Code</b>	Specifies the type of service to be provided based on the selected equipment type.
<b>Frequency</b>	Identifies how often the site will be serviced. An additional 'Service Days' field displays for frequencies scheduled on a repetitive basis vs. on-call. <ul style="list-style-type: none"> <li>• If 'On Call' is selected the Service Days and Week of Month fields are hidden.</li> <li>• If a weekly or monthly option is selected, additional <i>Service Days</i> and <i>Week of Month</i> fields display in the editor.</li> </ul>
<b>Per Unit</b>	The per unit rate charged for the service. Used in the SVC Fees calculation. $QTY \times PER\ UNIT = SVC\ FEES$
<b>SVC Fees</b>	SVC Fees are calculated as $QTY \times Per\ Unit$ .
<b>Service Days</b>	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. <b>Default selection logic:</b> 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.
<b>Rent Free Days</b>	Option to provide a set amount of days the customer will not be charged a daily rental fee.
<b>Daily Rate</b>	Option to charge a daily rental fee for the equipment sitting at a site.
<b>Requested By</b>	Typically the name of the person who signed the contract approving the service.
<b>Service Notes</b>	Option to add <b>Service Notes</b> the driver should see each time the location is serviced.
<b>Delivery</b>	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. <i>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.</i>
<b>Route</b>	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.
<b>Date</b>	If equipment is being delivered, enter the requested delivery date into the <b>Date</b> field.

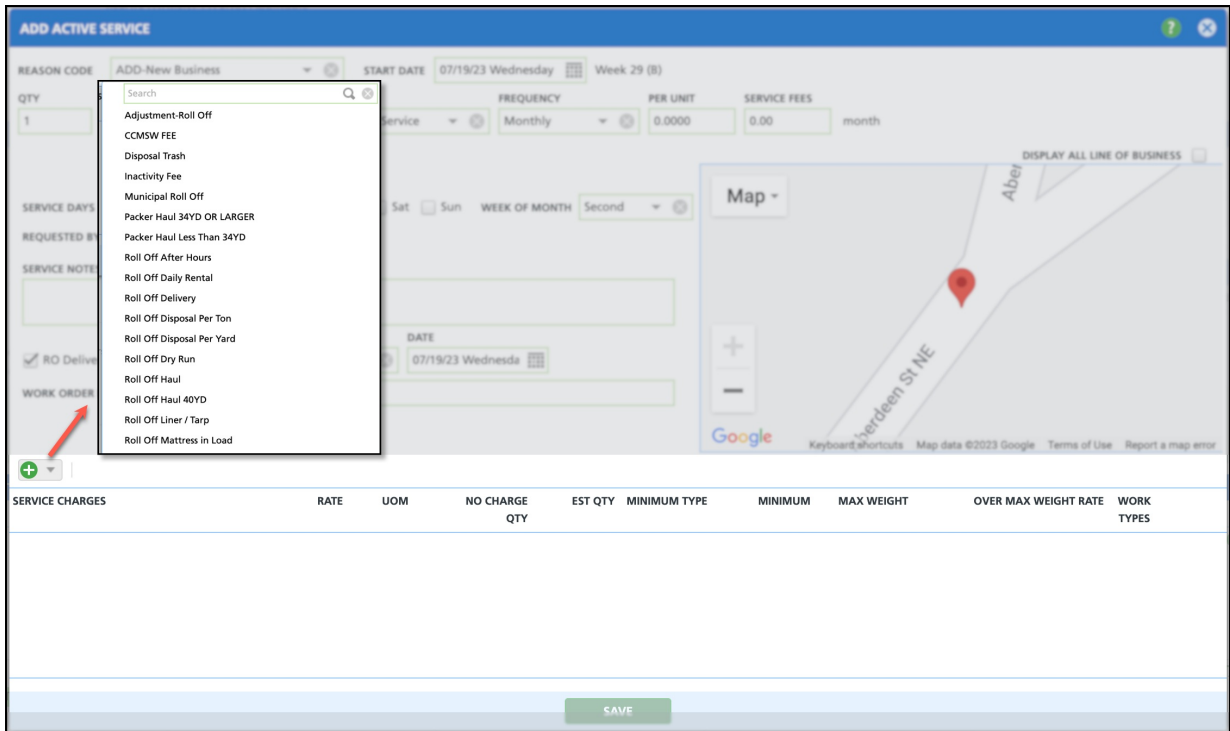
<b>Work Order Notes</b>	Option to enter a one-time <b>Work Order Note</b> for the driver. <i>Example: "Place the container on the south side of the building."</i>
<b>Map</b>	
<b>Display All Lines of Business Check Box</b>	Select to include all other lines of business in the map's display. Leave unchecked to see only locations that are the same line of business as the service being added.
<b>Map/Satellite</b>	Toggle between a map or satellite view of the locations.
<b>Location Pins</b>	Displays each service location as a pin on the map. Hover over the pin of a location to view the location's address information.

### 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. 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
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<b>Service Charges</b>	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.
<b>Rate</b>	The rate that applies for the service charge. Select within the rate field to enter the rate amount.
<b>UOM</b>	The unit of measure that is used in rate and quantity calculations. Example: \$30 (rate) per ton (UOM).
<b>No Charge Qty</b>	A quantity amount that will not be charged for.
<b>Est Qty</b>	The estimated quantity expected for the service.
<b>Max Weight</b>	For weight rated charges, establishes the maximum weight for the charge.
<b>Over Max Weight Rate</b>	The rate that applies if the max weight is exceeded.
<b>Work Types</b>	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.

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## Related Articles

[Active Services Overview](#)

[End and Edit Active Services](#)

[Schedule an On Call Order](#)

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