

Add New Active Service

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Pathway: Customer > Search > Accounts

Add an active service to a site using the 'Add Active Service' 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.

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
74	Delete Pending Active Service Change
75	Override Pending Active Service Change <i>*Permission to allow the user to edit a pending active service change.</i>

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 illustrates the Customer Service interface with three numbered callouts indicating where to add a new active service:

- 1. Account Menu drop down:** Located in the top left corner, showing a list of options including 'Active Service', 'Appointment', 'Attachment', etc.
- 2. Active Services tool bar:** Located below the account details, featuring a '+', '-', and '<' icon set to add or manage services.
- 3. Calendar display:** A calendar view at the bottom showing dates from June 25 to July 6. A right-click context menu is shown over the calendar, with 'Add Active Service' as the first option.

Additional details visible in the screenshot include account information for '22222 Aberdeen St NE', a 'Next Invoice Date Feb 01, 2023', and a table of active services with columns for QTY, SERVICE CODE, SERVICE ID, FREQUENCY, and SCHEDULE.

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.
Service Code	Identifies the type of material the equipment will hold and is limited by line of business.
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. <ul style="list-style-type: none"> • If 'On Call' is selected the Service Days and Week of Month fields are hidden. • If a weekly or monthly option is selected, additional <i>Service Days</i> and <i>Week of Month</i> fields display in the editor.
Per Unit	The per unit rate charged for the service. Used in the SVC Fees calculation. $QTY \times PER\ UNIT = SVC\ FEES$

SVC Fees	SVC Fees are calculated as <i>QTY x Per Unit</i> .
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.
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.
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. <i>Example: "Place the container on the south side of the building."</i>
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.
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.

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
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 quantity expected for the service.
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.
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Related Articles

[Active Services Overview](#)

[End and Edit Active Services](#)

[Schedule an On Call Order](#)
