

# Active Services Overview

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Pathway: Customer > Search > Accounts

Active Services display on the Customer Service screen within the Active Services section as well as in the Calendar on the servicing date. This article provides a basic understanding of the active services features you will see when viewing a customer's account.

The screenshot displays the 'Active Services Overview' for a customer account. At the top, account details for 'Navusoft Premier Waste' (48973) and 'Cloned Site' (48973002) are shown, including addresses and account status. Below this is a table of active services. A calendar view at the bottom shows service dates from January 28 to February 24, 2024.

QTY	SERVICE CODE	SERVICE ID	FREQUENCY	SCHEDULE	RATE	WO MIN.	START DATE	END DATE	CONTRACT EXP.
1	3 Yard Trash Service	05F6	2x per week	T,H	\$ 0.00 per month		02/09/24		
1	4 Yard Trash Service	E11B	2x per week		\$ 227.70 per month		02/09/24		

## Icons

The following icons display in the Active Services section for a site:

This close-up highlights the icons in the Active Services table. Red arrows point to the following elements:

- Active Service Viewing Options:** Points to the eye icon in the table header.
- Add new Active Service:** Points to the plus sign icon in the table header.
- Add/Edit Service Notes & PO Number:** Points to the three dots icon in the 'CONTRACT EXP.' column.
- Rate History - view a history of all services and their rates:** Points to the plus sign icon in the 'RATE' column.

## Color Display

The Active Services section uses background colors to identify the status of services associated with the site. If a service has ended with an end date in the past, it will no longer display in the Active Services section. Ended services

are archived and can be accessed by selecting the Rate History icon.

*Purple* = Future Service

*Red* = Services with a future end date

*White/No Color* = Current Services

33171 | **Cornerstone Construction**

50 PO BOX 12345 SAN ANTONIO, TX 78265-4810 12345 Active

2 DIVISION CORPUS

1 ACCOUNT MGR Rob Schneider

0 CLASS COMMERCIAL

0 BILL GROUP COR-COMMERCIAL

	CURRENT	1-30	31-60	61-90	91-120	120+	TOTAL
	-75.00	0.00	0.00	0.00	160.14	75.00	160.14

ACTIVE SERVICES (3) Standard

QTY	SERVICE CODE
+	1 2 Yard VIP Recycle Service
+	1 15 Yard Open Top Service
+	1 4 Yard Trash Service