

Active Services Overview

Last Modified on 02/20/2024 10:51 am EST

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 address, division, and account type. Below this, a 'HIGHLIGHTS' section is visible, followed by a table of active services. The table lists two services: '3 Yard Trash Service' and '4 Yard Trash Service'. A calendar view below the table shows the servicing dates for these services, with specific events for 'FL_DELIVER' on Feb 8 and Feb 9.

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		

Permissions

The following permissions are required to view, add and edit active services to a site:

Permission ID	Permission Name
5	View Account
6	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 *Permission to allow the user to edit a pending active service change.

Icons

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

Active Service Viewing Options

Add new Active Service

Add/Edit Service Notes & PO Number

ACTIVE SERVICES (2)		Standard		TOTAL RECURRING \$ 227.70					
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	

Rate History - view a history of all services and their rates

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**

PO BOX 12345
SAN ANTONIO, TX 78265-4810
12345

Active

DIVISION CORPUS
ACCOUNT MGR Rob Schneider
CLASS COMMERCIAL
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