

Edit and End Active Services

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Pathway: [Accounts](#) > [Search \(account/site\)](#) > [Customer Service \(screen\)](#)

The following article details how to edit or end an active service for a site.

The screenshot displays a software interface for managing accounts. At the top, there are two account entries for 'Wild Mountain' at '37200 Wild Mountain Rd, Taylors Falls, MN 55084, US'. The left entry is 'Active' and the right entry is '1 of 1' and also 'Active'. Below the account information, there is a table with columns for 'CURRENT', '1-30', '31-60', '61-90', '91-120', '120+', and 'TOTAL'. The values in this table are all 0.00. Below the table, there is a 'HIGHLIGHTS' section and a 'PENDING' section. The 'ACTIVE SERVICES (2)' table is highlighted with a red border and contains the following data:

QTY	SERVICE CODE	SERVICE ID	FREQUENCY	SCHEDULE	ACCOUNT	RATE	NOTES
1	15 Yard Open Top Service	B99F	1x per week	M	Wild Mountain 37200 Wild Mountain Rd	\$ 35.00 per month	
2	2 Yard Recycle Service	EF73	1x per week	F	Wild Mountain 37200 Wild Mountain Rd	\$ 70.00 per month	

Below the services table, there is a 'CALENDAR' section for July 2024. The calendar shows the days of the week from Sunday to Saturday. The current date, July 12, 2024, is highlighted in green. The calendar also shows the dates Jul 1 through Jul 13.

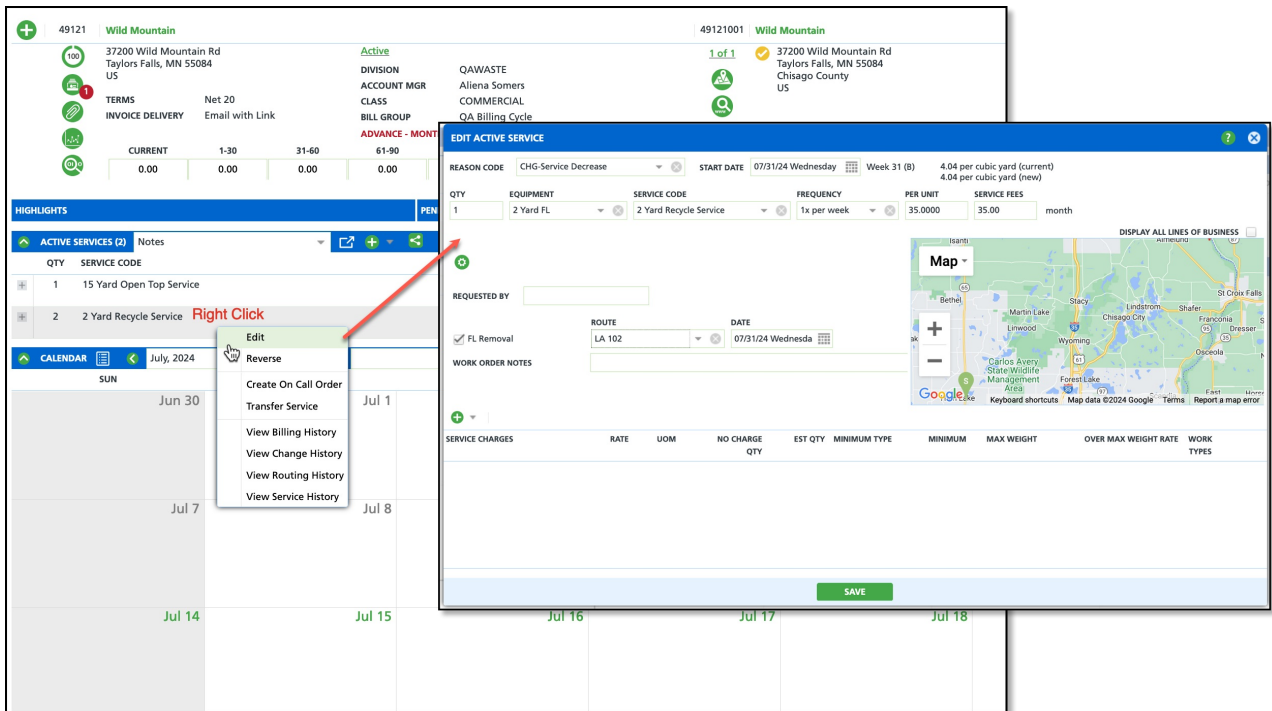
Permissions

The following permissions are required to edit and end an active service:

Permission ID	Permission Name
5	View Account
6	View Site
71	Edit 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.

Edit an Active Service

The following process applies to editing an existing active service.



1. From the customer's account, right-click on the banner of the active service and select **Edit**. This will display the Edit Active Service popup editor.
2. Select a **Reason Code** for the change and enter a **Start Date** the service change goes into effect.
3. Edit all necessary fields. If this is a decrease or increase in service, the following applies:
 - **Decrease:** In the QTY field, enter the new quantity amount for the service. When the quantity is decreased, an equipment removal workflow is provided.
 - **Increase:** In the QTY field, enter the new quantity amount for the service. When the quantity is increased, an equipment delivery workflow is provided.
4. Select **Save** when finished.

Reverse an Active Service

The following logic applies to reversing an active service:

The 'Reverse' option in the Active Services drop down becomes available after a service is added. A service can be reversed only if there are no billed services or service records with a Work Status other than 'Scheduled.' If a service cannot be reversed, an error popup will appear, informing the user of the reason. If the reversal is successful, the service will be removed from the site's Active Services.

1003 Price Aliena Somers 09/22/2023

ACTIVE SERVICES (3) Standard TOTAL RECURRING \$ 160.00

QTY	SERVICE CODE	SERVICE ID	FREQUENCY	SCHEDULE	RATE	START DATE	END DATE	CONTRACT
1	10 Yard Open Top Service	4AD6	On Call		\$ 85.00 per month	08/21/23		06/07/28
1	10 Yard Trash Service	FD27	1x per week	M	\$ 75.00 per month	08/31/23		06/07/28
2	10 Yard Open Top Service	2BE6	On Call		\$ 170.00 per month	10/06/23		06/07/28

Rent: \$ 2.25 per day after 14 days Reason: ADD-New Business Posted By: Aliena Somers on 09/27/2023

CALENDAR

EVENTS AR, Service Records, Rental Fee, Service Change

SUN	TUE	WED	THU	FRI
Oct 2	Oct 3	Oct 4	Oct 5	Oct 6
Oct 8	Oct 9	Oct 10	Oct 11	Oct 12
Oct 15	Oct 16	Oct 17	Oct 18	Oct 19
Oct 20				

Invoice 884157

1, RO_DELIVER, 10YDRO
1, RO_DELIVER, 10YDRO
10 Yard Open Top Service, AT

End an Active Service

The following process should be used when ending a service.

49121 Wild Mountain 37200 Wild Mountain Rd Taylors Falls, MN 55084 US

Active

49121001 Wild Mountain 37200 Wild Mountain Rd Taylors Falls, MN 55084 Chisago County US

Active

1 of 1

Net 20

QAWASTE

ACCOUNT MGR Aliena Somers

CLASS COMMERCIAL

BILL GROUP QA Billing Cycle

ADVANCE - MONTHLY Billed Thru Date Jul 18, 2024

INVOICE DELIVERY Email with Link

INVOICE DELIVERY

TERMS

Auto Pay Not Enabled

HIGHLIGHTS

PENDING

ACTIVE SERVICES (2) Notes

1 15 Yard Open Top Service

2 2 Yard Recycle Service Right Click

CALENDAR July, 2024

EDIT ACTIVE SERVICE

REASON CODE END-End Service Week 29 (A) END DATE 07/31/24 Wednesday 4.04 per cubic yard (current) 4.04 per cubic yard (new) 0% change

QTY EQUIPMENT SERVICE CODE FREQUENCY PER UNIT SERVICE FEES

2 2 Yard FL 2 Yard Recycle Service 1x per week 35.0000 70.00 month

REQUESTED BY

ROUTE DATE

FL Removal LA 105 07/31/24 Wednesday

WORK ORDER NOTES

SERVICE CHARGES

RATE UOM NO CHARGE EST QTY MINIMUM TYPE MINIMUM MAX WEIGHT OVER MAX WEIGHT RATE WORK TYPES

SAVE



A warning message triggers if a pending change for a future date (for the selected service) already exists. Select **Yes to Continue**. **NOTE:** Ending the service will overwrite all of its pending future changes. Please review the permissions section above, as this process requires additional access. Specifically, refer to permissions 74 and 75.

1. From the Customer's Account, right-click on the banner for the ending service and select **Edit**.

2. Select a **Reason Code** to specify why the service is ending and enter an **End Date**.
 3. Select the Removal check box if equipment removal is required.
 4. Select a **Route** for equipment pickup to be placed on.
 5. Enter a **Removal Date** and add any **Work Order Notes** that may apply.
 6. Upon receiving authorized consent (refer to your company's policies on requirements), enter the name of the person who requested the cancellation in the **Requested By** field.
 7. Click **Save**.
 - The banner for the service will display in red in the Active Services section of the customer's account leading up until the End Date. After the end date has passed the service will be archived in the account's history and will no longer display in the Active Services section for the account.
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Related Articles

[Add New Active Service](#)

[Active Services Overview](#)

[Work Type Event Class](#) - *additional setup to schedule delivery / removal with a service quantity change.*
