

# Edit and End Active Services

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

The screenshot displays a software interface for managing accounts and services. 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 are various fields for 'DIVISION', 'ACCOUNT MGR', 'CLASS', and 'BILL GROUP'. A table shows 'CURRENT' and 'TOTAL' values for different periods (1-30, 31-60, 61-90, 91-120, 120+). A 'HIGHLIGHTS' section is followed by a 'PENDING' section. The main part of the interface is a table of 'ACTIVE SERVICES (2)'. The table has columns for QTY, SERVICE CODE, SERVICE ID, FREQUENCY, SCHEDULE, ACCOUNT, RATE, and NOTES. Two services are listed: '15 Yard Open Top Service' (B99F, 1x per week, M, \$ 35.00 per month) and '2 Yard Recycle Service' (EF73, 1x per week, F, \$ 70.00 per month). Below the services table is a 'CALENDAR' view for July 2024, showing dates from Jun 30 to Jul 13. The calendar highlights Jul 12 and Jul 13.

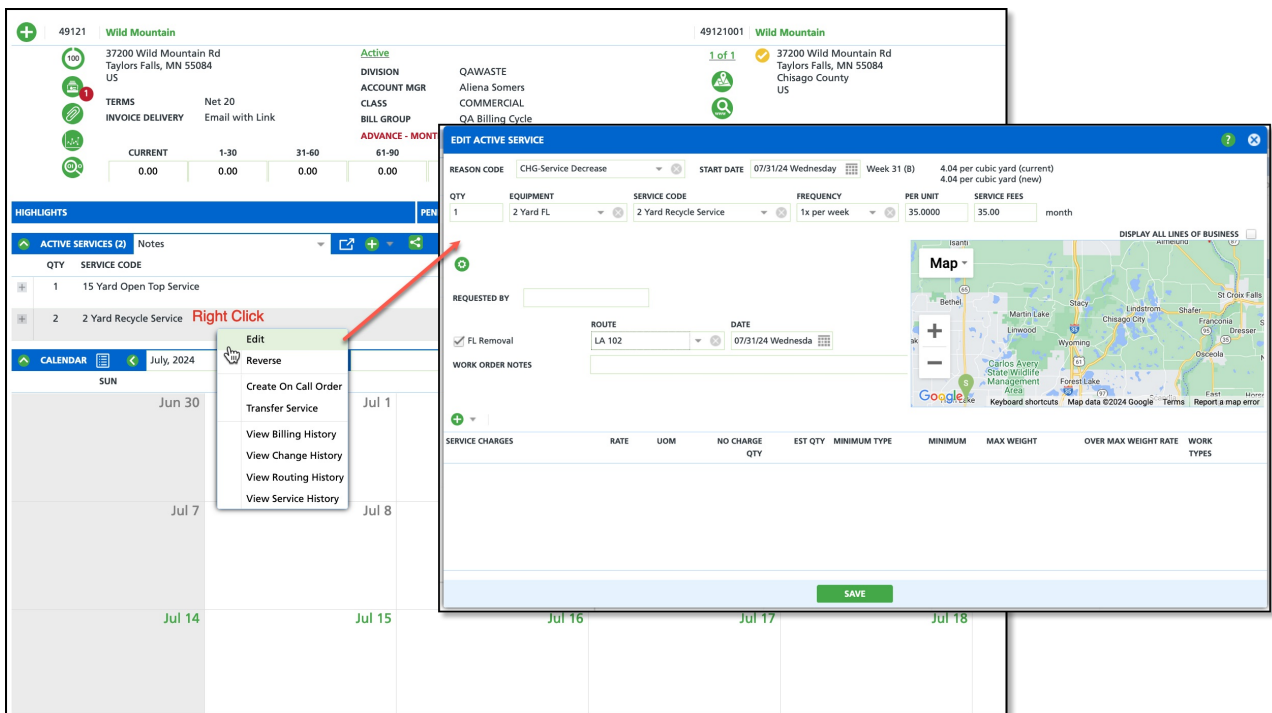
## Permissions

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**.
2. Select a **Reason Code** for the adjustment and enter a **Start Date** the service change goes into effect.
3. Edit the desired 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 if provided.
4. Select **Save** when finished.

## End an Active Service

The following process should be used when ending a service.

The screenshot displays a customer account for 'Wild Mountain' with address '37200 Wild Mountain Rd, Taylors Falls, MN 55084, US'. The account is active and has a billing cycle of 'ADVANCE - MONTHLY Billed Thru Date Jul 18, 2024'. A table shows current and future billing amounts. A 'PENDING' banner is visible. The 'EDIT ACTIVE SERVICE' window is open, showing details for a '2 Yard Recycle Service' with an end date of '07/31/24 Wednesday'. The window includes a 'REASON CODE' dropdown, 'END DATE' field, 'EQUIPMENT' and 'SERVICE CODE' dropdowns, 'FREQUENCY' and 'PER UNIT' fields, 'SERVICE FEES' field, a 'REQUESTED BY' field, a 'ROUTE' dropdown, a 'DATE' field, a 'WORK ORDER NOTES' field, and a 'SAVE' button.



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.

## Related Articles

[Add New Active Service](#)

[Active Services Overview](#)

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