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.



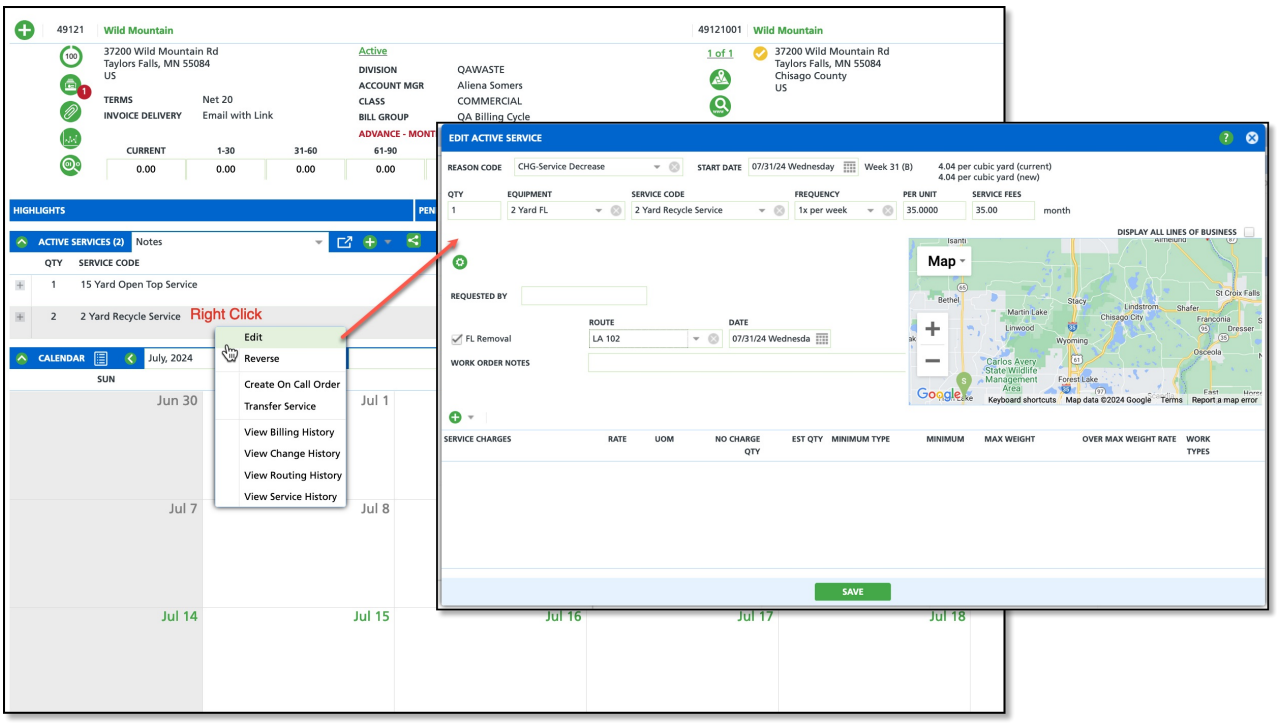
Permissions

The following permissions are 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:
    - **Qty Increase / Decrease**: In the **QTY** field, enter the new quantity amount for the service. When the quantity is increased /decreased, an equipment delivery **or** removal workflow is automatically provided.
    - **Service Increase / Decrease:** In the **Equipment** field, enter the new equipment for the service. When the equipment is increased / decreased, an automatic delivery **and** removal workflow is automatically provided.
4. Select **Save** when finished.

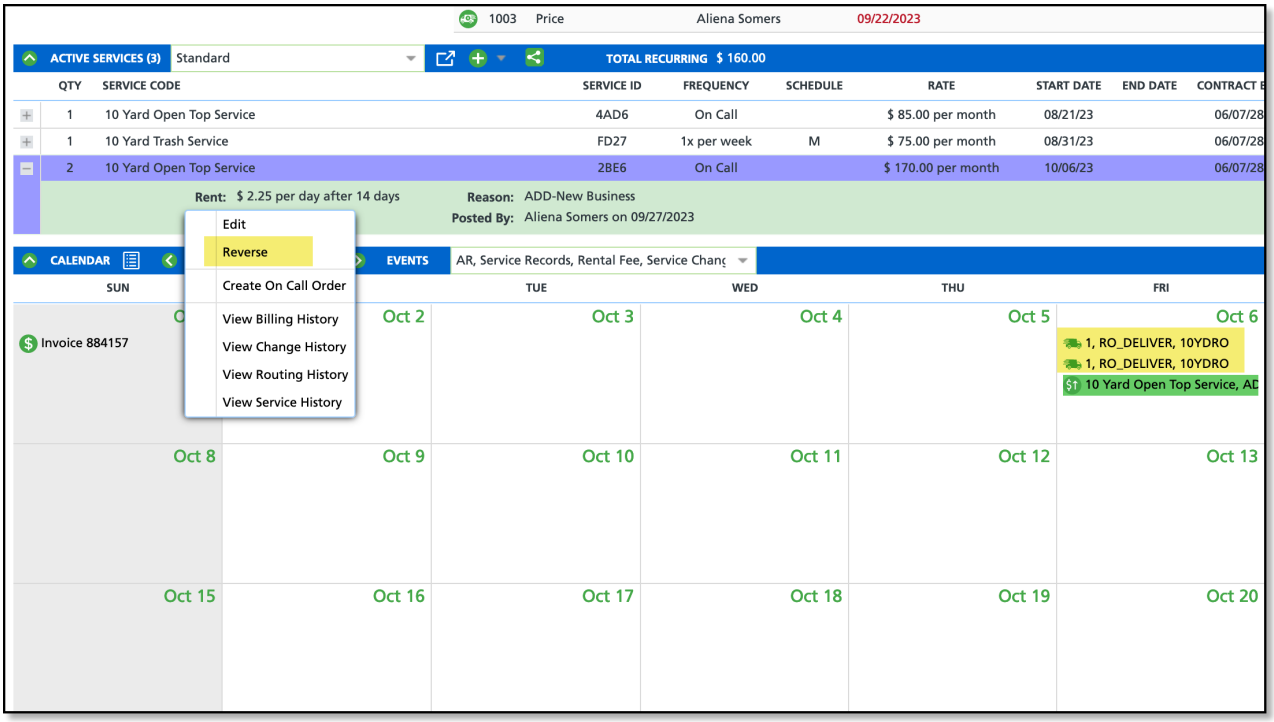
When an EQUIPMENT CHANGE occurs, pay close attention to the charge codes. These do NOT reset to the new service automatically. You must manually set the correct charge codes. Size specific codes must be removed and added. For non-size specific charges, change the rate, if needed.

After the Equipment change is saved, work orders for the original service can not be created, even when a day prior to the service change date is selected.

Reverse an Active Service

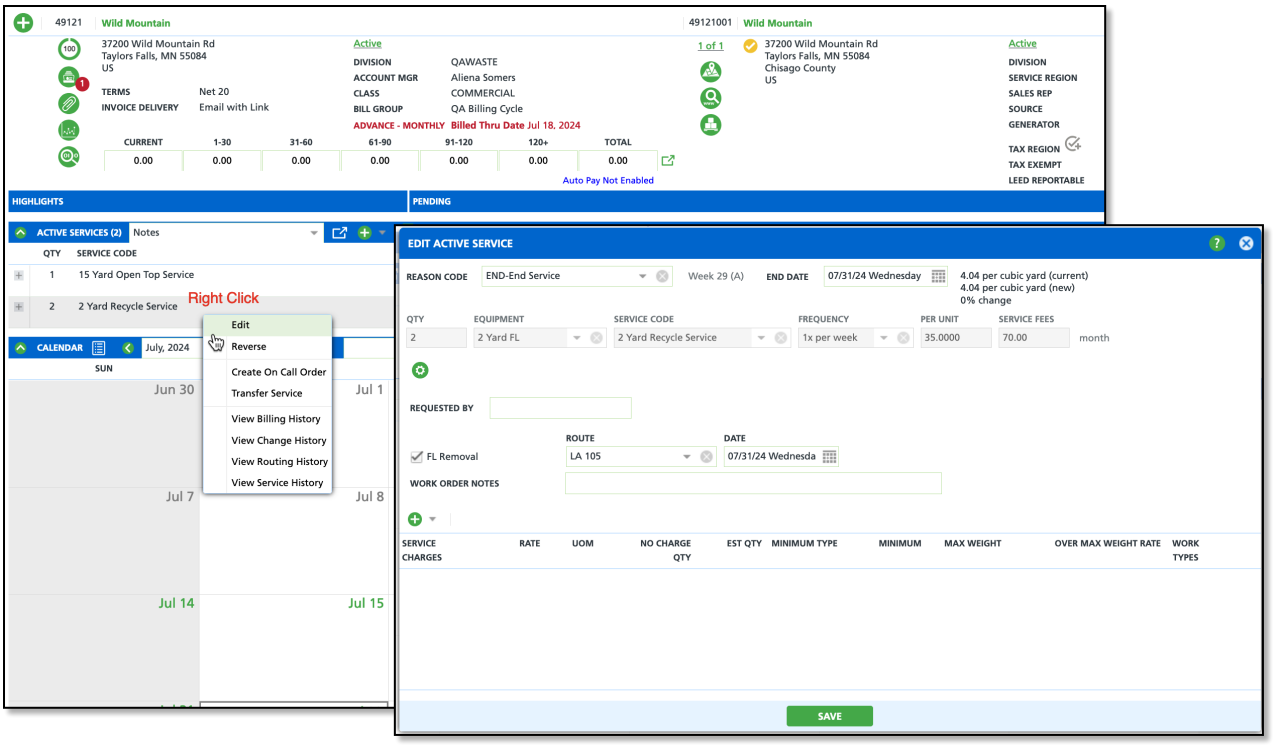
The following logic applies to reversing an active service:

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.



End an Active Service

The following process should be used when ending a service.



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. Check the Removal 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.
   Note: If Work Order Notes already exist for the service, they will automatically populate in the Work Order Notes section when creating the Removal work order. Review and update or delete, as needed.
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.*