Edit and End Active Services

Last Modified on 07/23/2024 9:03 am EDT

Pathway: Customer > Search > Accounts

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



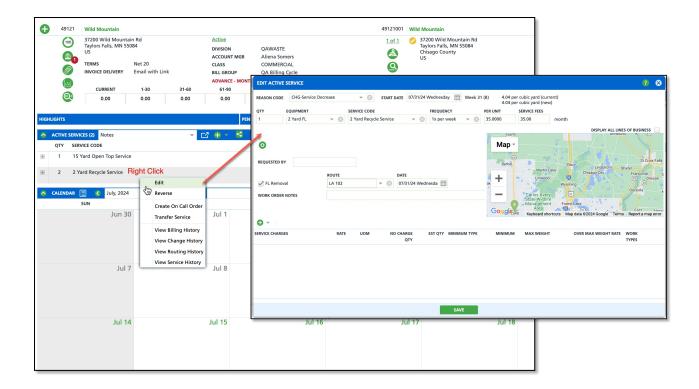
Permissions

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

Edit an Active Service

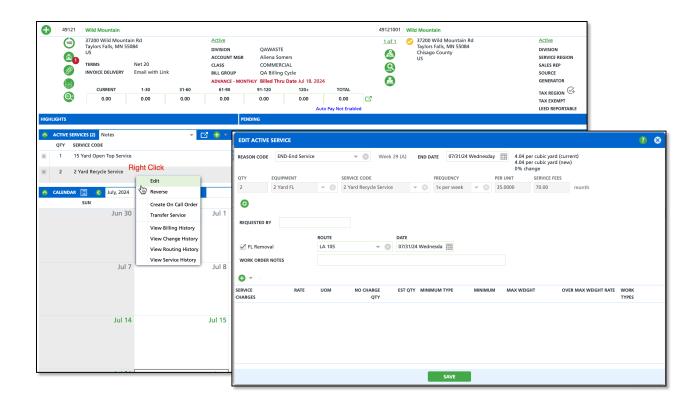
The following process applies to editing an existing active service.



- 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, a removal check box is displayed. Select the check box and a route for equipment removal.
 - Increase: In the QTY field, enter the new quantity amount for the service. When the quantity is
 increased, a delivery check box is displayed. Select the check box and a route for equipment to be
 delivered on.
- 4. Select **Save** when finished.

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.

- 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.