

# 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.

The screenshot displays a software interface for managing accounts. At the top, there are two account cards for 'Wild Mountain' (49121 and 49121001). Below this, a table lists active services. 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) and '2 Yard Recycle Service' (EF73, 1x per week, F). Below the table is a calendar view for July 2024, showing dates from Jun 30 to Jul 13. The interface also includes various icons and a 'TOTAL RECURRING \$ 105.00' label.

## 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

## Edit an Active Service

The following process applies to editing an existing active service.

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

Active  
DIVISION  
ACCOUNT MGR  
CLASS  
BILL GROUP  
ADVANCE - MONTH

QAWASTE  
Allena Somers  
COMMERCIAL  
QA Billing Cycle

49121001 Wild Mountain  
1 of 1  
37200 Wild Mountain Rd  
Taylors Falls, MN 55084  
Chisago County  
US

EDIT ACTIVE SERVICE

REASON CODE: CHG-Service Decrease START DATE: 07/31/24 Wednesday Week 31 (8) 4.04 per cubic yard (current) 4.04 per cubic yard (new)

QTY	EQUIPMENT	SERVICE CODE	FREQUENCY	PER UNIT	SERVICE FEES
1	2 Yard FL	2 Yard Recycle Service	1x per week	35.0000	35.00 month

RIGHT CLICK

- Edit
- Reverse
- Create On Call Order
- Transfer Service
- View Billing History
- View Change History
- View Routing History
- View Service History

Map

SAVE

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:
  - o **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.
  - o **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.

The screenshot displays a customer account for 'Wild Mountain' at 37200 Wild Mountain Rd, Taylors Falls, MN 55084. The account is active and has a billing cycle of 'ADVANCE - MONTHLY' with a bill due date of July 18, 2024. A table shows current and future billing amounts. A 'PENDING' banner for a '2 Yard Recycle Service' is highlighted with a red 'Right Click' label. The 'EDIT ACTIVE SERVICE' modal is open, showing fields for Reason Code (END-End Service), End Date (07/31/24), Equipment (2 Yard FL), Service Code (2 Yard Recycle Service), Frequency (1x per week), Per Unit (35.0000), and Service Fees (70.00). It also includes a 'REQUESTED BY' field, a 'ROUTE' dropdown (LA 105), a 'DATE' field (07/31/24), and a 'WORK ORDER NOTES' field. A 'SAVE' button is at the bottom.



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**.
  - o 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.](#)