

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 the account management interface for Wild Mountain. It shows account details for 49121 Wild Mountain and 49121001 Wild Mountain. The account is active and has a total recurring amount of \$105.00. The interface includes a table of active services and a calendar view.

| 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 | |

The calendar view shows the current date as July 12, 2024, and highlights the active services for the week of July 8-13, 2024.

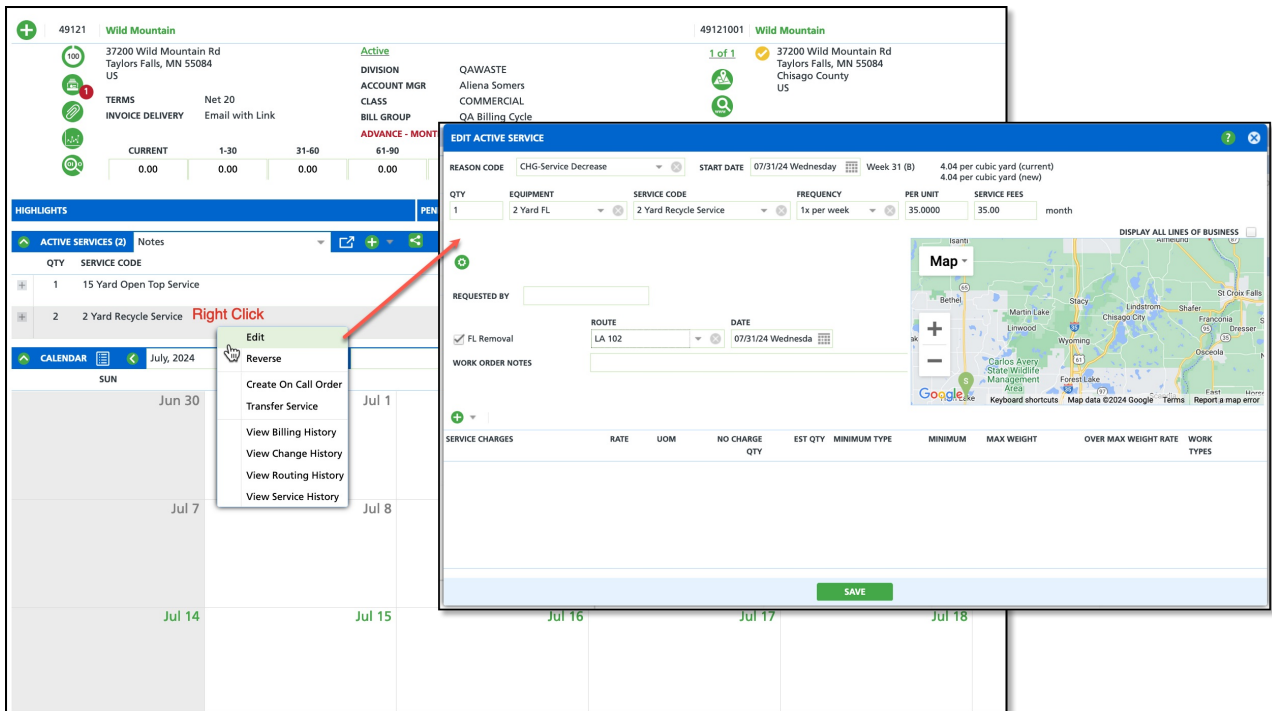
Permissions

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 <i>*Permission to allow the user to edit a pending active service change.</i> |

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:
 - o **Decrease:** In the QTY field, enter the new quantity amount for the service. When the quantity is decreased, an equipment removal workflow is provided.
 - o **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.

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 49121001 Wild Mountain

37200 Wild Mountain Rd Taylors Falls, MN 55084 US

Active

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

Active

TERMS Net 20

INVOICE DELIVERY Email with Link

DIVISION QAWASTE

ACCOUNT MGR Aliena Somers

CLASS COMMERCIAL

BILL GROUP QA Billing Cycle

ADVANCE - MONTHLY Billed Thru Date Jul 18, 2024

| CURRENT | 1-30 | 31-60 | 61-90 | 91-120 | 120+ | TOTAL |
|---------|------|-------|-------|--------|------|-------|
| 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |

Auto Pay Not Enabled

HIGHLIGHTS PENDING

ACTIVE SERVICES (2) Notes

| QTY | SERVICE CODE |
|-----|--------------------------|
| 1 | 15 Yard Open Top Service |
| 2 | 2 Yard Recycle Service |

Right Click

CALENDAR July, 2024

Jul 1

Jul 7

Jul 14

Jul 15

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

LA 105 07/31/24 Wednesday

WORK ORDER NOTES

FL Removal

| SERVICE CHARGES | RATE | UOM | NO CHARGE QTY | 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.*
