Change a Site's Status

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Pathway: Account > Search > Select Account

The current status of a site is shown in the **Site Details** section of the Customer Service screen. Click the status to open the **Site Status History** popup editor, where you can view the status history or update the site's current status.

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Permissions

The following permissions are required to change a site's status:

| Permission ID | Permission Name |
|---------------|---|
| 5 | View Account |
| 6 | View Site |
| 135 | Modify Non-Prospect Account/Site Status |

Site Status History Field Descriptions

| Field Description |
|-------------------|
|-------------------|

| Field | Description |
|----------------|---|
| New Status | The current status of the site. Click on the drop down to view a list of all status's and to assign a new status. Status Options: Active: The site is currently receiving active services. Inactive: Requires the site does not have any active services for status to apply. Prospect: No active services as the site is still in the sales process. Vacation Hold: Active services are on hold but will continue to be billed for any monthly rates and/or fees. Site Credit Hold: Only available if 'Bill By Site' in the account's setup is set to 'Yes'. <i>Bill By Site</i> is used when an account has multiple sites that are individually billed. Vacant: Requires the site does not have any active services for status to apply. Exempt: Used in cases where a waste provider has a municipal contract (meaning they have to service all the houses in an area) but a particular property is exempt from being serviced. |
| Sales Stage | Indicates the stage in the sales lifecycle the prospect account is in. This field is only available for selection for the Prospect status. |
| Effective Date | The date the status change will go into effect. Example: Customer calls today (9/9/22) and says they will be on vacation from 9/19/22- 9/30/22. Select the Vacation Hold status and enter the Effective Date as 9/19/22. |
| Note | Option to include notes regarding the reason for the change of status. |

Change a Site's Status

- 1. From the Site Details section of the Customer Service screen, click on the current status displayed for the site. This will open the **Site Status History** popup editor.
- 2. In Site Status History, select a status from the New Status drop down field.
 - If Prospect is selected, select the status the prospect account is in from the **Sales Stage** drop down. This field is inactive for all other status selections.
- 3. Enter an Effective Date.
- 4. Enter a Note to record additional information for the status change. This field is optional.
- 5. Select **Save** when finished.