

Linking Services

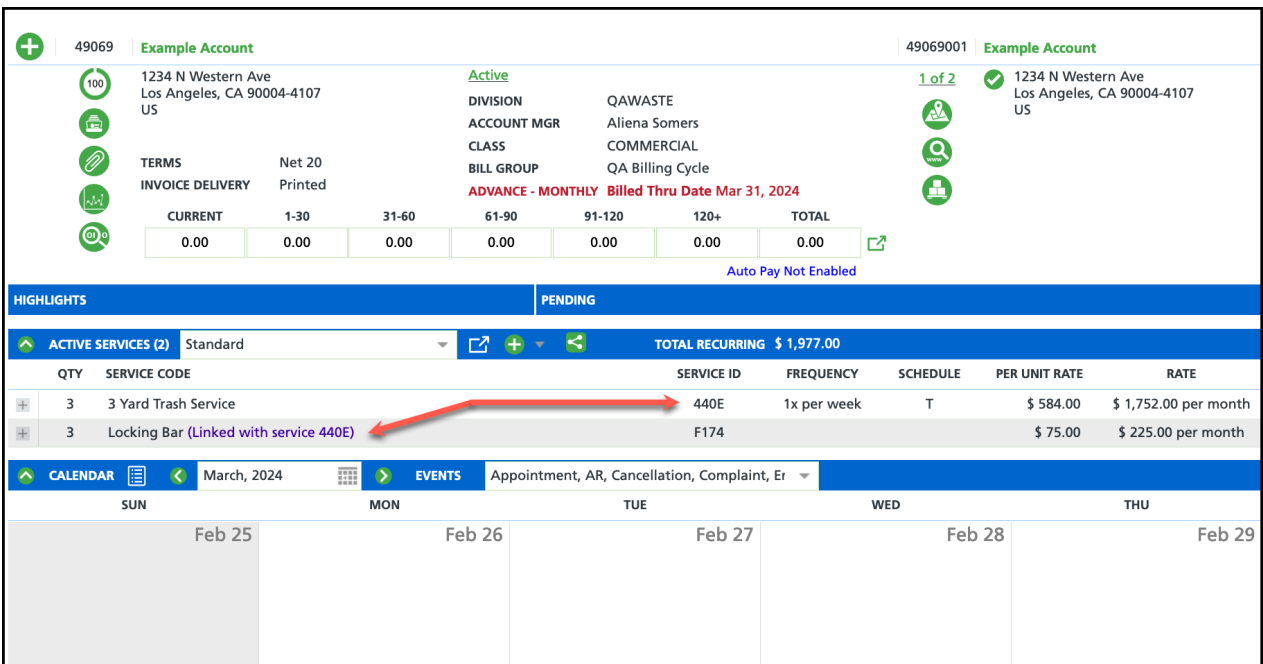
Last Modified on 03/29/2024 2:18 pm EDT

Pathway: [Customer Service Screen](#) > [Active Services \(Section\)](#)



The service linking feature is included in version 72, which is scheduled for release in spring 2024.

This article focuses on linking site services. When an active service is added to, or already exists on an account, users can link additional services such as a "locking bar" with it. This linking establishes a parent/child hierarchy, with the "child" service code referencing the Service ID of its corresponding "parent" service code in the Active Services section. Review the logic and setup requirements to better understand the site service linking feature.



The screenshot displays the 'Example Account' interface. At the top, account details for '49069 Example Account' and '49069001 Example Account' are shown. Below this, a table lists 'ACTIVE SERVICES (2)'. The first row is '3 Yard Trash Service' with Service ID '440E'. The second row is '3 Locking Bar (Linked with service 440E)' with Service ID 'F174'. A red arrow points from the text '(Linked with service 440E)' to the '440E' Service ID in the row above. Below the services table is a 'CALENDAR' view for March 2024, showing dates from Feb 25 to Feb 29.

Logic:

The following logic is applied to linking services:

- Each child service code can only be linked to one parent service code at a time.
- The child service code must have "Enable Parent Service Linking" enabled. Refer to the Setup Requirements section below for further details.
- When a parent service is terminated, all active child services linked to it are also terminated.
- When reversing an End Service on a parent service, the same will be applied to linked children. End Service reversals can not be applied on a child service.

Permissions

The following permissions are required to link services:

Permission ID	Permission Name
5	View Account

6	View Site
70	Add Active Service to Active Account - <i>necessary if the service hasn't been added</i>
73	Add Active Service - <i>necessary if the service hasn't been added</i>

Setup Requirements:

Pathway: Setup > Services > Service Code

In Service Code Setup, field "Enable Parent Service Linking" must be set to "Yes" for the child service code. This field only displays if "Enable Routing" **AND** "Require Frequency" are both set to "No."

The screenshot shows the 'SERVICE CODE SETUP' interface. A modal window titled 'UPDATE SERVICE CODE' is open, displaying various configuration fields. The 'ENABLE PARENT SERVICE LINKING' field is highlighted with a red box and is set to 'Yes'. Other fields include 'SERVICE CODE' (FLRENT), 'NAME' (Front Load Rental Fee), 'LINE OF BUSINESS' (Commercial), 'EQUIPMENT TYPE', 'MATERIAL TYPE', 'UOM' (month), 'TAXABLE' (No), 'GL ACCOUNT', 'PRORATION METHOD' (Calendar Days - Start and End), 'BILL WHILE ON CREDIT HOLD' (Yes), 'IS AP TRANSACTION' (No), and 'ENABLE RENTAL FEE' (No).

Linking Services

When linking is enabled for the child service, users can right-click on the child service to reveal a "Link Parent Service" option. Upon selection, the user will be prompted to choose the parent service to link it with. To **unlink** services, users can right-click on the child service and select "Unlink Parent Service" from the options.



✓ A parent service can have more than one child linked to it by adding each child service and linking them individually.

HIGHLIGHTS PENDING Auto Pay Not Enabled

ACTIVE SERVICES (2) Standard TOTAL RECURRING \$ 1,977.00

QTY	SERVICE CODE
3	3 Yard Trash Service
3	Locking Bar

CALENDAR Appointment, AR, Cancellation, Complaint, Er

March 20 Feb 26 Feb 27

SUN MON TUE WED

Mar 10 Mar 11 Mar 12

Right-Click

- Edit
- Link Parent Service *Service has already been linked*
- Create On Call Order
- Transfer Service
- View Billing History
- View Change History
- View Routing History
- View Service History

LINK PARENT

PARENT SERVICE 3 Yard Trash Service (440E - 1x per week)

LINK

Related Articles

- [Service Code Setup](#)
- [Add New Active Service](#)
- [Active Services Overview](#)