

Linking Services

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Pathway: Customer Service Screen > Active Services (Section)

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 Customer Service Screen for account 49069. It shows account details, a table of active services, and a calendar view. A red arrow highlights the link between the 'Locking Bar (Linked with service 440E)' and the '3 Yard Trash Service'.

QTY	SERVICE CODE	SERVICE ID	FREQUENCY	SCHEDULE	PER UNIT RATE	RATE
3	3 Yard Trash Service	440E	1x per week	T	\$ 584.00	\$ 1,752.00 per month
3	Locking Bar (Linked with service 440E)	F174			\$ 75.00	\$ 225.00 per month

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 - necessary if the service hasn't been added
73	Add Active Service - necessary if the service hasn't been added

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, showing configuration options for service code 'FLRENT'. The 'ENABLE PARENT SERVICE LINKING' field is highlighted with a red box and is set to 'Yes'. Other fields include 'SERVICE CODE', 'NAME', 'LINE OF BUSINESS', 'EQUIPMENT TYPE', 'MATERIAL TYPE', 'UOM', 'TAXABLE', 'GL ACCOUNT', 'PRORATION METHOD', 'BILL WHILE ON CREDIT HOLD', 'IS AP TRANSACTION', 'ENABLE ROUTING', 'REQUIRE FREQUENCY', 'ENABLE DRIVER UPDATE', 'ENABLE ACCOUNT SIGNATURE', 'ENABLE DRIVER SIGNATURE', 'ENABLE WORK ORDER MINIMUM', 'ENABLE RENTAL FEE', 'ENABLE DEFAULT DESTINATION', 'ENABLE NEGATIVE AMOUNT', and 'ENABLE ESTIMATE TRACKING'.

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.

The screenshot shows the service management interface. A right-click context menu is open over the '3 Yard Trash Service' entry. The 'Link Parent Service' option is highlighted. A 'LINK PARENT' dialog box is open, showing the 'PARENT SERVICE' dropdown menu with '3 Yard Trash Service (440E - 1x per week)' selected. The 'LINK' button is visible at the bottom of the dialog box. The background shows a calendar view with dates from March 10 to March 12.

Related Articles

[Service Code Setup](#)

[Add New Active Service](#)

[Active Services Overview](#)
