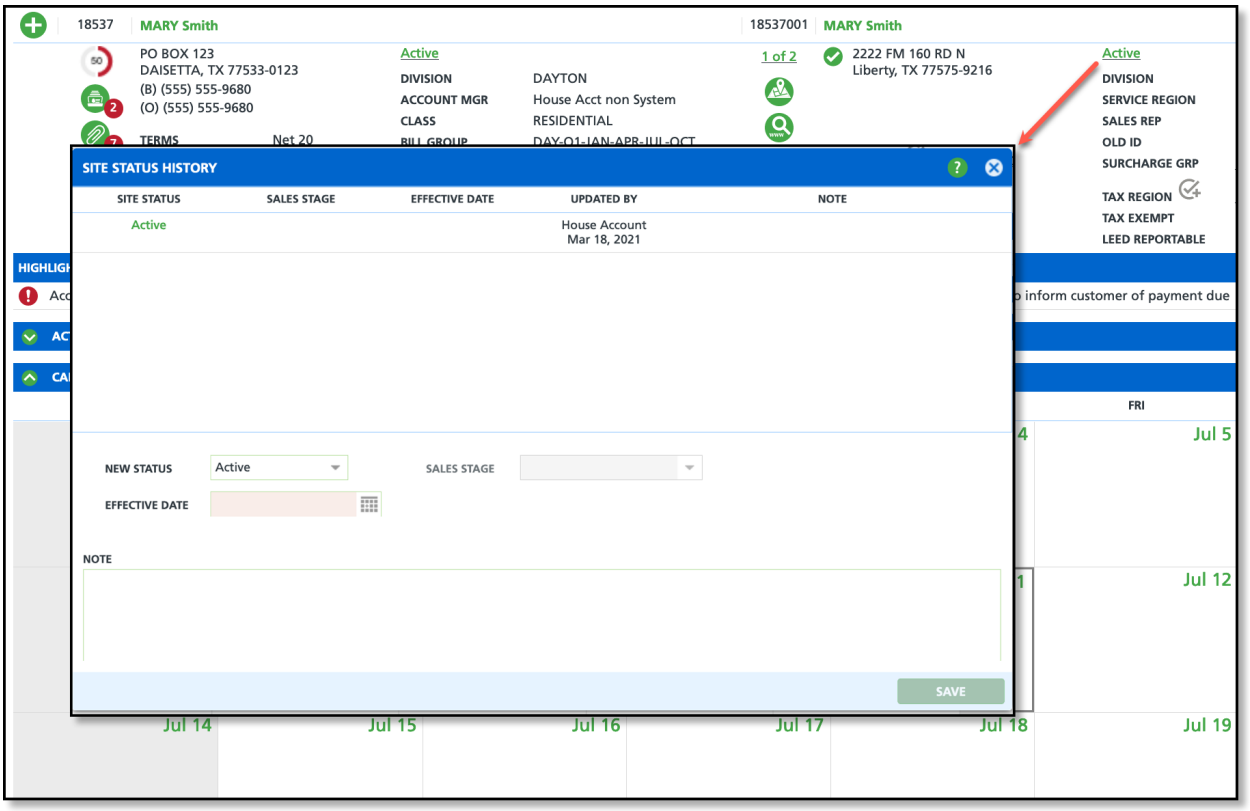
Process a Vacation Hold

Last Modified on 11/02/2026 2:03 pm PST

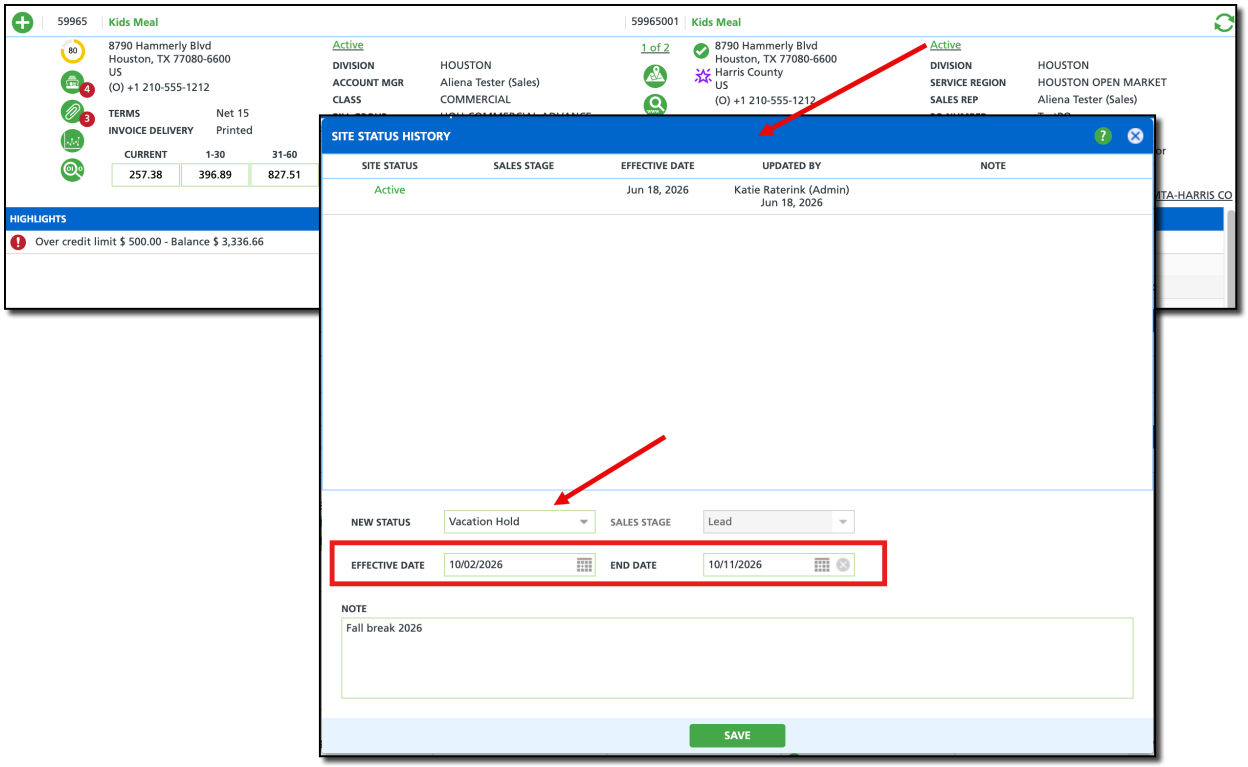
Pathway: *Customer Service Screen > Site Details > Site Status*

From the Customer Service screen, users can place sites on a Vacation Hold status to prevent unnecessary service charges and maintain operational efficiency on routes.



Process a Vacation Hold

In the Site Details section of the Customer Service screen, open Site Status History by clicking on the Active status link. Refer to image above for an example. This will open the Site Status History where the status can be updated.



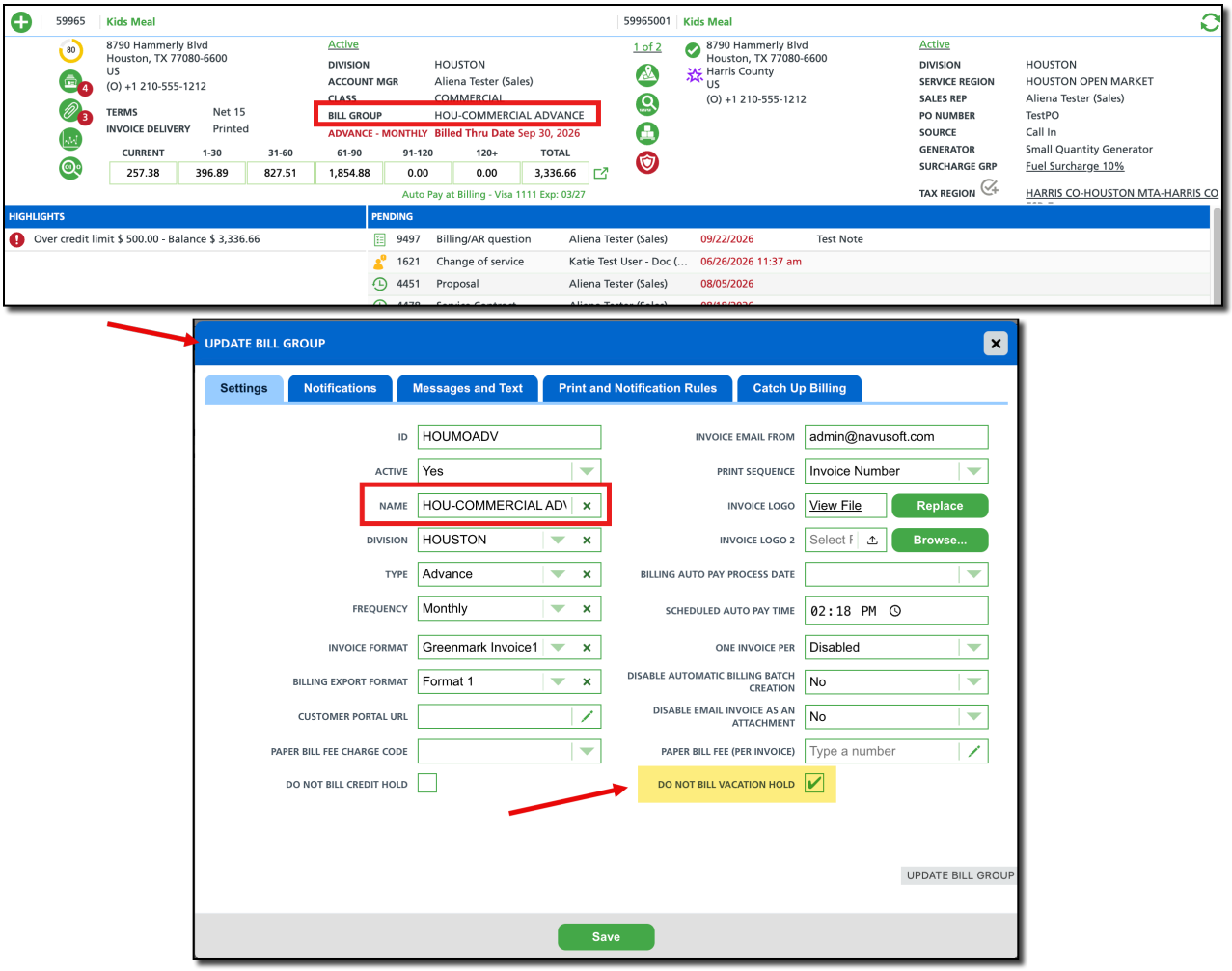
1. Click the **Active** status from the Site Details section on the Customer Service screen. This will display the **Site Status History** popup window.
2. Select 'Vacation Hold' from the **New Status** drop down menu.
3. Enter an **Effective Date.**
4. Enter an **End Date** to define the duration of the vacation hold. This field is optional.
    - If an end date **is** entered, the system will automatically return the site to an Active status on the specified end date.
    - If an end date **is not** entered, the user must manually change the status to 'Active' at the end of the vacation hold.
5. Add any applicable **Notes.**
6. Click **Save** when finished.

Suspend Billing

If a site is placed on **Vacation Hold** status, and the customer **should not** be billed during this period, the account's bill group must be configured to not bill while on vacation hold.

> **IMPORTANT:** Omit this process if your company still charges the customer while on vacation hold. Review your company's policies and procedures before continuing.

Make sure the **Do Not Bill Vacation Hold** setting is checked for the account's Bill Group. To learn more about Billing while one Vacation Hold and Credit Hold, reference Credit Holds, Vacation Holds and Billing.



Pathway: *Setup > Accounting > Bill Group*

Selected services can continue with billing while an account is on a vacation hold. Under *Setup > Accounting > Service Code*, the **Bill While on Hold** setting overrides the Bill Group configuration for applicable recurring charges, such as rental charges. All other recurring services remain excluded according to the Bill Group settings.

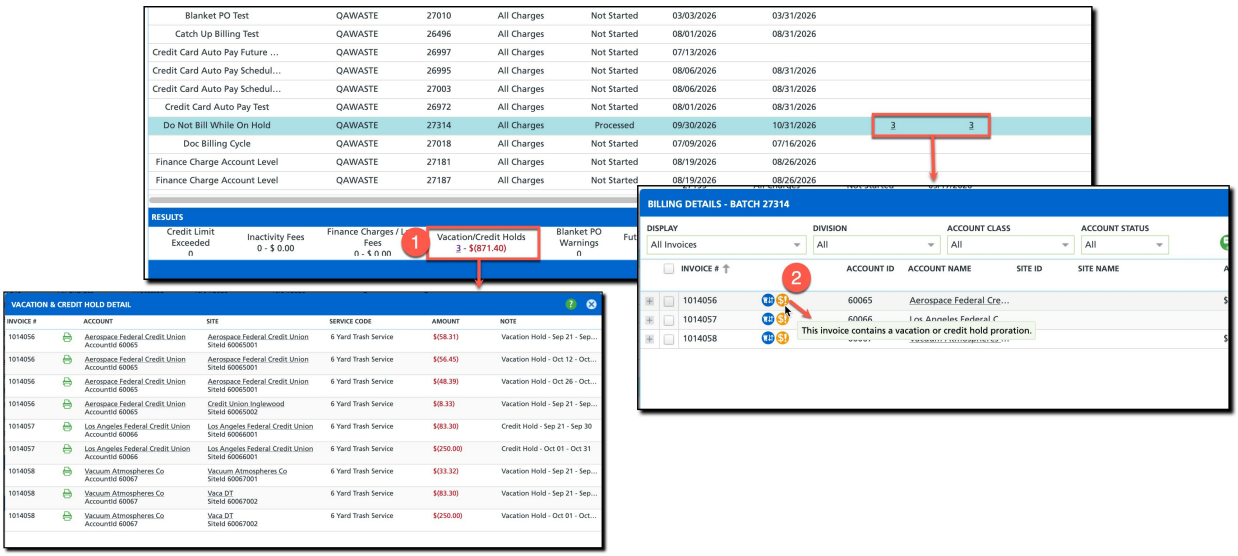
Billing

When billing is put on hold due to either a vacation or a credit hold, the billing screens provide the impact of the hold.

1. **Billing Summary**
   The **Results** section of the *Accounting > Billing* screen includes a **Vacation/Credit Holds** summary. This displays the number of invoices containing Vacation or Credit Hold prorations along with the total dollar amount of those prorations. Select the Vacation/Credit Holds link to open the Vacation & Credit Hold Detail screen.

2. **Billing Details**
   Within the **Billing Details** screen for a batch, an icon displays for invoices containing a Vacation or Credit

Hold proration. Hover over the icon to display the following message: “This invoice contains a vacation or credit hold proration.”



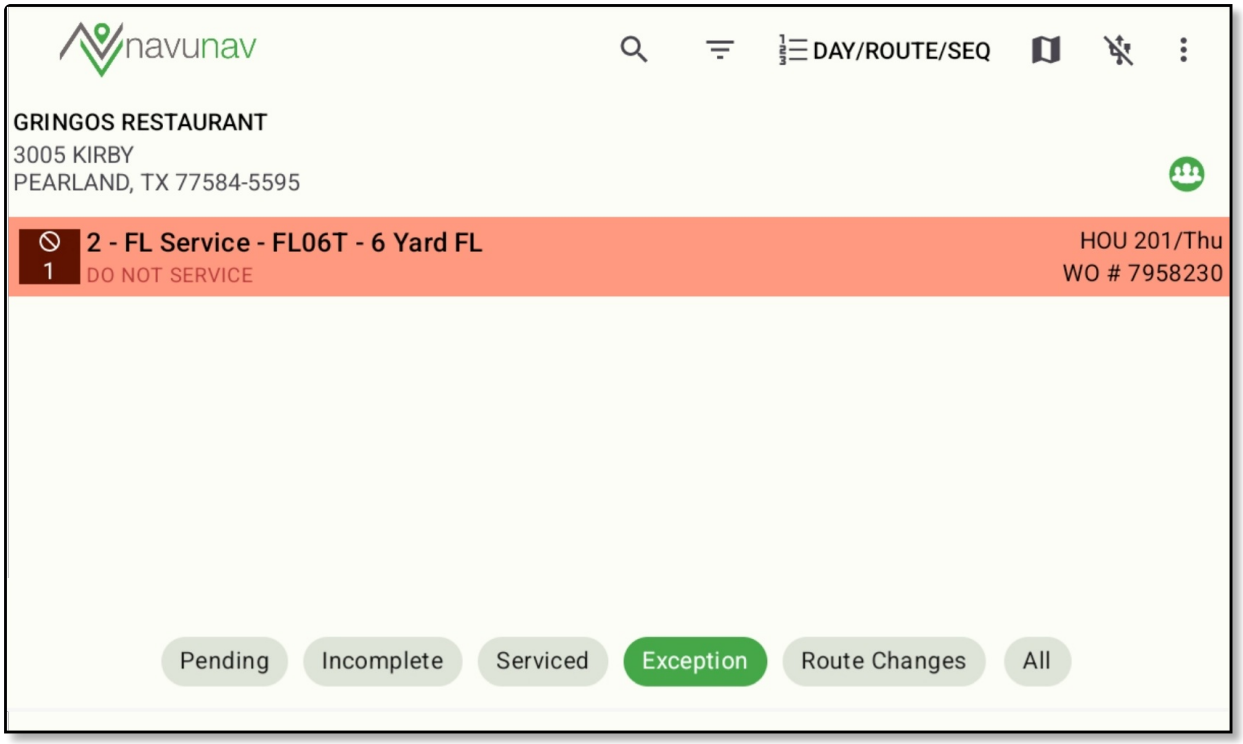
Pathway: *Accounting > Billing*

Reinstate Billing

If an account's Bill Group is configured with the **Do Not Bill Vacation Hold** setting enabled, billing will resume as normal when the vacation hold ends and the account becomes active again.

NavuNav

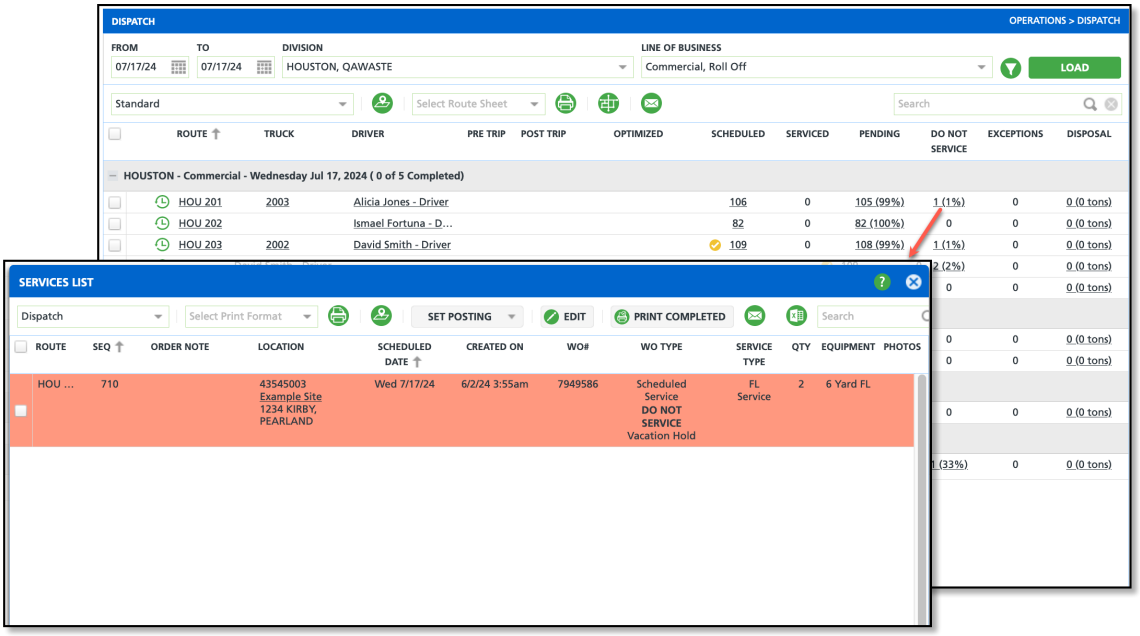
When a site is placed on vacation hold, it will remain on the route, but the driver will be alerted to its status by it being highlighted in red and "DO NOT SERVICE" displayed.



Android Example Displayed

Operations

When a site is placed on vacation hold, it will remain on the route and appear under the 'Do Not Service' column on the Dispatch screen as an active link to the Services List.



Vacation Hold Scenarios

Scenario 1: Vacation Hold Prevents Billing Recurring Services

- Bill Group - Do Not Bill Vacation Hold Enabled
- Service Code - Bill While on Hold Disabled

- Billing - occurs during Vacation Hold

Given

- The account is assigned to a Bill Group that **prevents** billing during Vacation Hold.
- The account has recurring services.
- The account is placed on Vacation Hold.

When

- The next billing process runs **during** the Vacation Hold period.

Then

- Applicable recurring services are not billed for the hold period.
- No recurring charge is generated for the applicable hold dates.
- Billing resumes after the Vacation Hold ends.

Scenario 2: Billing Continues During A Vacation Hold

- Bill Group - Do Not Bill Vacation Hold Disabled
- Service Code - Bill While on Hold Disabled
- Billing - occurs during Vacation Hold

Given

- The account is assigned to a Bill Group that **allows** billing during Vacation Hold (Do Not Bill Vacation Hold disabled)
- The account has recurring services.
- The account is placed on Vacation Hold.

When

- The next billing process runs **during** the Vacation Hold period.

Then

- Services continue to be billed for the hold period.
- No hold-related credit is calculated for those billed services.

Scenario 3: Service Code Override Continues Billing During Vacation Hold

- Bill Group - Do Not Bill Vacation Hold Enabled
- Service Code - Bill While on Hold Enabled (for a service, like equipment rental)
- Billing - occurs during Vacation Hold

Given

- The account is assigned to a Bill Group that prevents billing during Vacation Hold.
- The account has collection services and one equipment rental.
- The account is placed on Vacation Hold.
- The equipment rental Service Code is configured to Bill While on Hold.

When

- The next billing process runs **during** the Vacation Hold period.

Then

- Collection service charges are excluded from billing.
- Equipment rental charges continue to be included in billing.
- Billing for collection service resumes after the Vacation Hold ends.

Scenario 4: Credit After Previously Billed Vacation Hold Services

- Bill Group - Do Not Bill Vacation Hold Enabled
- Service Code - Bill While on Hold Disabled
- Billing - Account billed In Advance

Given

- The account is assigned to a Bill Group that **prevents** billing during Vacation Hold.
- The account was billed in advance for recurring services.
- The account is placed on Vacation Hold from October 10 through October 14. .

When

- The next invoice is generated **after** the Vacation Hold ends.

Then

- The system calculates a credit for five calendar days.
- The invoice includes a system-generated hold credit line item.

Scenario 5: Service Code Override Prevents a Credit for That Service

- Bill Group - Do Not Bill Vacation Hold Enabled
- Service Code - Bill While on Hold Enabled (for a service, like equipment rental)
- Billing - Account billed In Advance

Given

- The account is assigned to a Bill Group that **prevents** billing during Vacation Hold.
- The account is billed in advance for collection and rental services.
- Collection is configured by the Bill Group and does not bill during the hold.
- Rental service is configured to Bill While on Hold.

When

- The next invoice is generated **after** the Vacation Hold ends.

Then

- A hold credit is calculated for eligible collection service.
- No hold credit is calculated for rental service because it continued billing.

Scenario 6: No Credit When No Qualifying Service Was Billed in Advance

- Bill Group - Do Not Bill Vacation Hold Enabled
- Service Code - Bill While on Hold Disabled
- Billing - Account billed After Vacation Hold

Given

- The account is assigned to a Bill Group that **prevents** billing during Vacation Hold.
- No services were billed in advance before the hold.

When

- The next invoice is generated **after** the Vacation Hold ends.

Then

- No unnecessary hold credit is generated.
- A hold credit is created only when previously billed recurring services qualify for a credit.

Scenario 7: Overlapping Hold Periods Are Credited Once

- Bill Group - Do Not Bill Vacation Hold Enabled
- Service Code - Bill While on Hold Disabled
- Billing - Account billed After Vacation Hold

Given

- The account is assigned to a Bill Group that **prevents** billing during Vacation Hold and a Credit Hold.
- The account has a Credit Hold from September 1 through September 5
- The account has a Vacation Hold from September 4 through September 7.

When

- The next invoice is generated **after** the Vacation Hold ends.

Then

- Service charges are excluded from billing during the credit and vacation hold periods.
- The overlapping dates are not double credited.
- September 1 through September 7 is credited as seven distinct calendar days.

Permissions

The following permissions are linked to the ability to update a site status to vacation hold:

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

Related Articles

Credit Holds, Vacation Holds and Billing