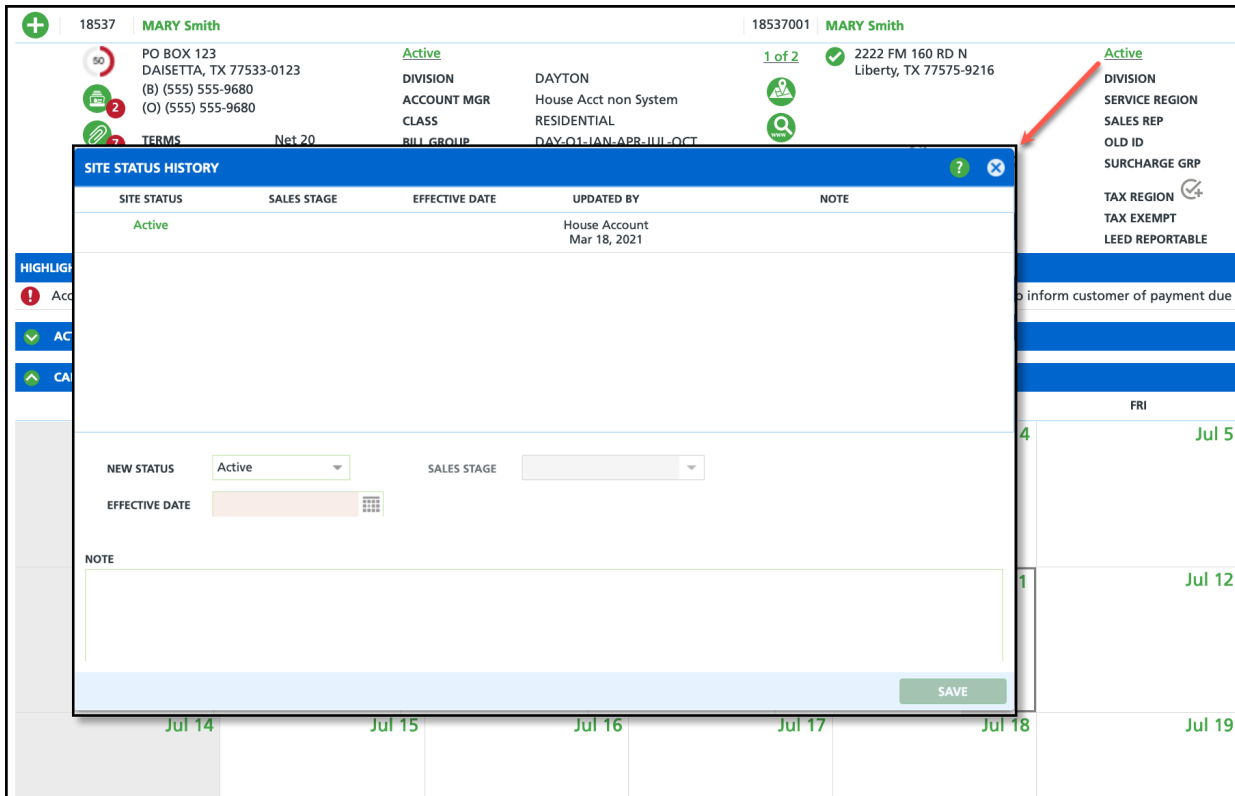


Process a Vacation Hold

Last Modified on 07/18/2024 4:21 pm EDT

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.



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

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.

SITE STATUS HISTORY				
SITE STATUS	SALES STAGE	EFFECTIVE DATE	UPDATED BY	NOTE
Active			House Account Mar 18, 2021	
NEW STATUS	Vacation Hold	SALES STAGE		
EFFECTIVE DATE	07/22/2024	END DATE	07/29/2024	
NOTE				
SAVE				

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, follow the process outlined below to suspend and later reinstate their billing.



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

The screenshot displays a software interface for account management. At the top, account details for MARY Smith are shown, including address, phone numbers, and account status. Below this is a table of active services. A red arrow points to the 'Hand Throw' service, with the text 'Right-Click to Edit' overlaid. An 'EDIT ACTIVE SERVICE' modal window is open, showing the following fields:

- REASON CODE: CHG-Price Decrease
- START DATE: 07/22/24 Monday
- EQUIPMENT: N/A
- SERVICE CODE: Hand Throw
- FREQUENCY: 1x per week
- PER UNIT: 0.0000
- SERVICE FEES: 0.00

A 'SAVE' button is located at the bottom of the modal window.

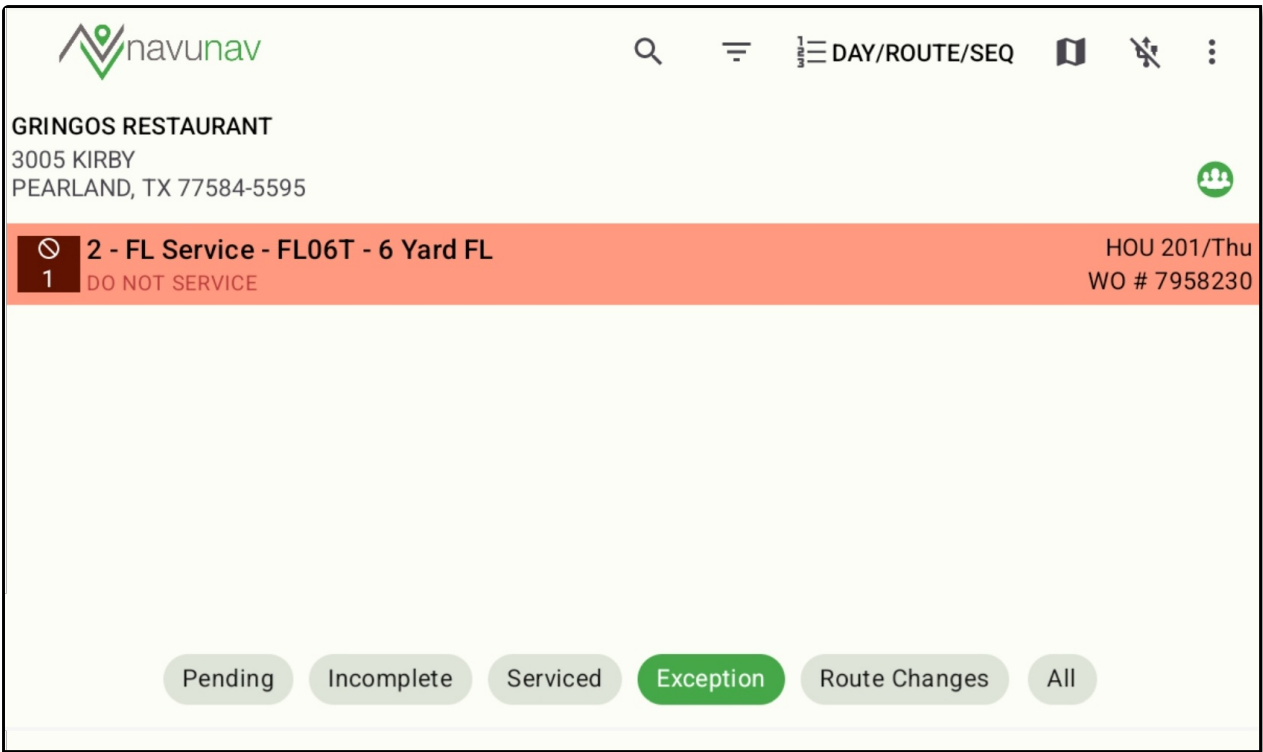
1. Right click on the applicable Active Service and select **Edit**.
2. Select **Chg.-Price Decrease** for the Reason Code.
3. Enter a **Start Date**. This should be the same date as the Effective Date entered for the Vacation Hold.
4. Enter **\$0.00** in the Per Unit field.
5. Click **Save**.

Reinstate Billing

1. Right click on the applicable Active Service and select **Edit**.
2. Select **Chg.-Price Increase** for the Reason Code.
3. Enter a **Start Date**. This should be the date billing will resume for the site.
4. Enter the **Per Unit** amount for the service.
5. Add any applicable **Notes**.
6. Click **Save** when finished.

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.

