Process a Vacation Hold

Last Modified on 12/02/2024 12:19 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.

| Ð | 18537 | MARY Smi | th | | | 18537001 | MARY Smith | | |
|---|--|---------------------|---|----------------|---|----------|--|-------------|---|
| | PO BOX 12: DAISETTA, 7 (B) (555) 55 (O) (555) 55 | | PO BOX 123 DAISETTA, TX 77533-0123 (B) (555) 555-9680 (O) (555) 555-9680 | | Active DIVISION DAYTON ACCOUNT MGR House Acct non System CLASS RESUDENTIAL | | 2222 FM 160 RD N Liberty, TX 77575-9216 | / | Active DIVISION SERVICE REGION SALES REP |
| | | TERMS | Net 20 | BILL GROUP | DAY-01-IAN-APR-IUI | -ост 🔛 | * 11 | | OLD ID |
| | SITE STA | | τ Υ | | | | ? 😣 | | SURCHARGE GRP |
| | SIT | TE STATUS Active | SALES STAGE | EFFECTIVE DATE | UPDATED BY House Account Mar 18, 2021 | | NOTE | | TAX REGION 🖂 TAX EXEMPT LEED REPORTABLE |
| HIGHLIGH Acc Acc Acc Acc Acc | | | | | | | | ວ inform cu | stomer of payment due |
| | | | | | | | | | FRI |
| | NEW EFFE | STATUS | Active | sales stage | | Ψ | | 4 | Jul 5 |
| | NOTE | | | | | | | 1 | Jul 12 |
| | | | | | | | SAVE | | |
| | | Jul 14 | 4 | Jul 15 | Jul 16 | Jul 1 | · lut | 18 | Jul 19 |

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 HISTO | RY | | | | | ? | 8 |
|-------------------|-----------------|----------------|-------------------------------|---|------|------|---|
| SITE STATUS | SALES STAGE | EFFECTIVE DATE | UPDATED BY | | NOTE | | |
| Active | | | House Account Mar 18, 2021 | | | | |
| | | | | | | | |
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| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| NEW STATUS | Vacation Hold 🔍 | SALES STAGE | | × | | | |
| EFFECTIVE DATE | 07/22/2024 | END DATE | 07/29/2024 | | | | |
| NOTE | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | SAVE | |

- 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 <u>is</u> 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.

| Ð | 18 | 537 | MARY Sr | nith | | | | | | | | 18 | 537001 | MARY Smith | | |
|----------|---------|-----------|----------------------|----------------|--------------|------------|------------|------------------|------------------------|--------------|----------------|----------------|----------|------------------------------------|-------------|----------------------------|
| | - 0 | •) | PO BOX 1 DAISETTA | 23 TX 77533 | 0123 | | Active | _ | | | | 1 | of 2 | 2222 FM 160 RD Liberty, TX 7757 | N 5-9216 | |
| | 6 | | (B) (555) | 555-9680 | 0125 | | DIVISION | MGR H | AYTON ouse Acct non | System | | (| | ciberty, incrisit. | -5210 | |
| | | 2 | (O) (555) | 555-9680 | | | CLASS | Right Ri | ESIDENTIAL | system | | | <u> </u> | | | |
| | 2 | 20 | TERMS | | Net 20 | | BILL GROUP | > D | AY-Q1-JAN-AP | R-JUL-OCT | | | unit i | | | |
| | | ul. | INVOICE D | EI R/EDV | Drintod | | ADVANCE | MONTHIN B | Had There Date | | | (| | | | |
| | G | | CUR | RENT | 1-30 | 31-60 | 61-90 | 9 | 1-120 | 120+ | TOTAL | | | | | |
| | 6 | 2 | 0. | 00 | 0.00 | 0.00 | 0.00 | | 0.00 | 219.60 | 219.60 | | | | | |
| | | | | | | | | | | A | uto Pay Not En | abled | | | | |
| HIG | ILIGHTS | | | | | | | PENDING | | | | | | | | |
| Ð | Accourt | nt is sig | nificantly p | oast due | | | | 1 837 | 7 Billing// | AR question | | Charisma Reyna | | 12/23/2022 | | Call to inform customer of |
| ^ | ACTIVE | SERVIC | | otes | | E | 2 🕂 - 🗧 | тс | TAL RECURRING | s \$ 29.00 | | | | | | |
| | QTY | SERV | ICE CODE | | | | | | SERVICE ID | FREQUENCY | SCHEDU | JLE | | ACCOUNT | | RATE |
| H | 1 | Han | d Throw | Right | -Click to | Edit | | | 32A4 | 1x per week | k F | | | MARY Smith 2222 FM 160 RD N | | \$ 29.00 per mont |
| Ŧ | 1 | 6 Ya | rd Trash Se | ervice | 1 | | | | 6905 | On Call | | | | MARY Smith 2222 FM 160 RD N | | \$ 0.00 per monti |
| ~ | CALEN | DAR [| SUN | July, 2024 | EDIT ACTIVE | SERVICE | | | | | | | | | | ? ⊗ |
| | | | SUN | hun 2 | REASON CODE | CHG-Price | Decrease | - 0 | START DAT | E 07/22/24 M | onday 📖 | Week 30 (A) | | | | |
| | | | | Jun 3 | | FOUNDATION | | | | | | | | | | |
| | | | | | | EQUIPMENT | - 0 | Hand Throw | E | - Ø | 1x por wook | - 0 0 | | SERVICE FEES | month | |
| | | | | | | 1675 | . @ | Tiana Tinov | • | - W | TX per week | • 🐨 0.1 | 0000 | 0.00 | montar | |
| | | | | lut | REQUESTED BY | | | | | | | | | S ZS S | S | OF BUSINESS |
| | | | | Jul 1 | | | | | | | | Google | Keyboard | shortcuts Map data © | 2024 Terms | Report a map error |
| | | | | | O - | | | | | | | | | | | |
| | | | | | SERV CHA | RATE | UOM | NO CHARGE QTY | EST QTY | MINIMUM TYP | E MIN | MUM MAX | WEIGHT | OVER MAX | WEIGHT RATE | WORK TYPES |
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- 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.

| mavunav | Q | Ŧ | | D | 14. 1 | : |
|--|--------|-----------|---------------|-----|-------------------|------------------|
| GRINGOS RESTAURANT 3005 KIRBY PEARLAND, TX 77584-5595 | | | | | | • |
| O2 - FL Service - FL06T - 6 Yard FL1DO NOT SERVICE | | | | V | HOU 20 VO # 79 | 01/Thu 958230 |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| Pending Incomplete Serviced | E | xception | Route Changes | All | | |
| Android E | xample | 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.

| | DISPAT | сн | | OPERATIONS > DISPATCH | | | | | | | | | |
|-------------|---------------|----------------------|--------------------------|-----------------------------|---------------|------------------|---------------|-----------------------|--------|------------------|-------------------|------------|-------------------|
| | FROM 07/17 | TO /24 07/17/24 | HOUSTON | I, QAWASTE | | | LINE OF BUS | INESS al, Roll Off | | | | - 🗸 🗖 | LOAD |
| | Stand | lard | | - Select | Route Sheet | - 🖨 | | | | Sear | ch | | Q, (3) |
| | | ROUTE 🕇 | TRUCK | DRIVER | PRE TRIP | POST TRIP | OPTIMIZED | SCHEDULED | SERVIC | ED PENDING | DO NOT SERVICE | EXCEPTIONS | DISPOSAL |
| | = но | USTON - Commercial - | Wednesday Jul 1 | 7, 2024 (0 of 5 Complet | ed) | | | | | | | | |
| | | HOU 201 | 2003 | Alicia Jones - Driver | | | | 106 | 0 | <u>105 (99%)</u> | 1 (1%) | 0 | 0 (0 tons) |
| | | HOU 202 | | <u>Ismael Fortuna - D</u> . | | | | <u>82</u> | 0 | 82 (100%) | 0 | 0 | <u>0 (0 tons)</u> |
| | | HOU 203 | 2002 | David Smith - Drive | r | | | <u>109</u> | 0 | <u>108 (99%)</u> | <u>1 (1%)</u> | 0 | <u>0 (0 tons)</u> |
| CERVICES IN | e 7 | - D. | uid Emilia Deivor | | | | | | | | 2 <u>(2%)</u> | 0 | <u>0 (0 tons)</u> |
| JERVICES EI | 31 | | | | | | | | | • • | 0 | 0 | <u>0 (0 tons)</u> |
| Dispatch | | ▼ Select Print | Format 👻 | 🖹 🖉 🛛 SET | POSTING T | 🖉 EDIT | PRINT COMP | LETED 🖂 | | Search | C | | |
| ROUTE | SEQ 🕇 | ORDER NOTE | LOCATION | SCHEDULED | CREATED ON | WO# | WO TYPE | SERVICE | QTY | EQUIPMENT PHOTOS | 0 | 0 | <u>0 (0 tons)</u> |
| | | | | DATE 🕇 | | | | TYPE | | | 0 | 0 | 0 (0 tons) |
| нои | 710 | | 43545003 Example Site | Wed 7/17/24 | 6/2/24 3:55ar | m 7949586 | Scheduled | FL | 2 | 6 Yard FL | | | |
| | | | 1234 KIRBY, | | | | DO NOT | Jervice | | | 0 | 0 | 0 (0 tons) |
| | | | FEARLAND | | | | Vacation Hold | | | | | | |
| | | | | | | | | | | | 1 (33%) | 0 | 0 (0 tons) |
| | | | | | | | | | | | | | |
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