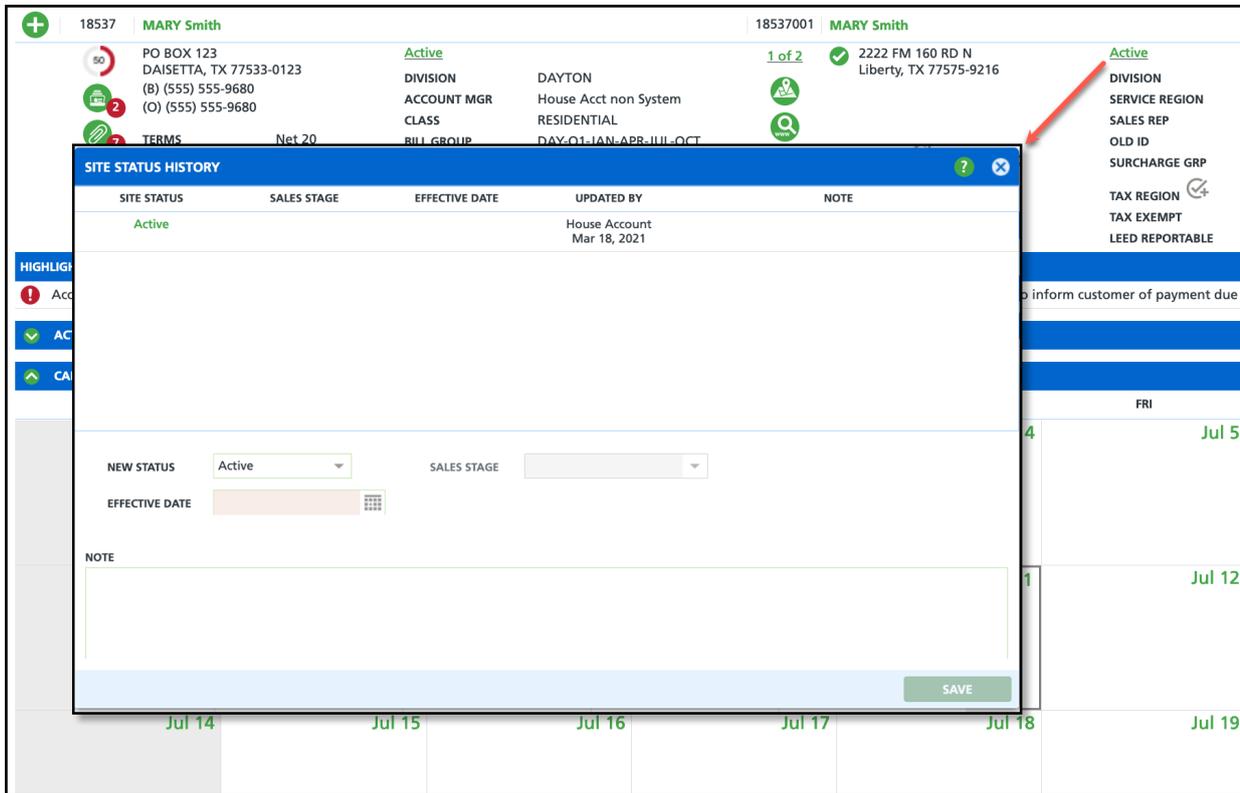


Process a Vacation Hold

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.



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.

18537 | MARY Smith

18537001 | MARY Smith

PO BOX 123
DAISETTA, TX 77533-0123
(B) (555) 555-9680
(O) (555) 555-9680

Active

1 of 2

2222 FM 160 RD N
Liberty, TX 77575-9216

TERMS Net 20
DUPLICATE RECEIVED

DIVISION DAYTON
ACCOUNT MGR House Acct non System
CLASS RESIDENTIAL
BILL GROUP DAY-Q1-JAN-APR-JUL-OCT

CURRENT	1-30	31-60	61-90	91-120	120+	TOTAL
0.00	0.00	0.00	0.00	0.00	219.60	219.60

Auto Pay Not Enabled

HIGHLIGHTS

Account is significantly past due

PENDING

8377 Billing/AR question Charisma Reyna 12/23/2022 Call to inform customer of p

ACTIVE SERVICES (2) Notes TOTAL RECURRING \$ 29.00

QTY	SERVICE CODE	SERVICE ID	FREQUENCY	SCHEDULE	ACCOUNT	RATE
1	Hand Throw	32A4	1x per week	F	MARY Smith 2222 FM 160 RD N	\$ 29.00 per month
1	6 Yard Trash Service	6905	On Call		MARY Smith 2222 FM 160 RD N	\$ 0.00 per month

CALENDAR July, 2024

SUN

Jun 30

Jul 7

Jul 14

EDIT ACTIVE SERVICE

REASON CODE CHG-Price Decrease START DATE 07/22/24 Monday Week 30 (A)

QTY 1 EQUIPMENT N/A SERVICE CODE Hand Throw FREQUENCY 1x per week PER UNIT 0.0000 SERVICE FEES 0.00 month

REQUESTED BY

DISPLAY ALL LINES OF BUSINESS

Google Keyboard shortcuts Map data ©2024 Terms Report a map error

SERV... RATE UOM NO CHARGE EST QTY MINIMUM TYPE MINIMUM MAX WEIGHT OVER MAX WEIGHT RATE WORK TYPES

CHA... QTY

SAVE

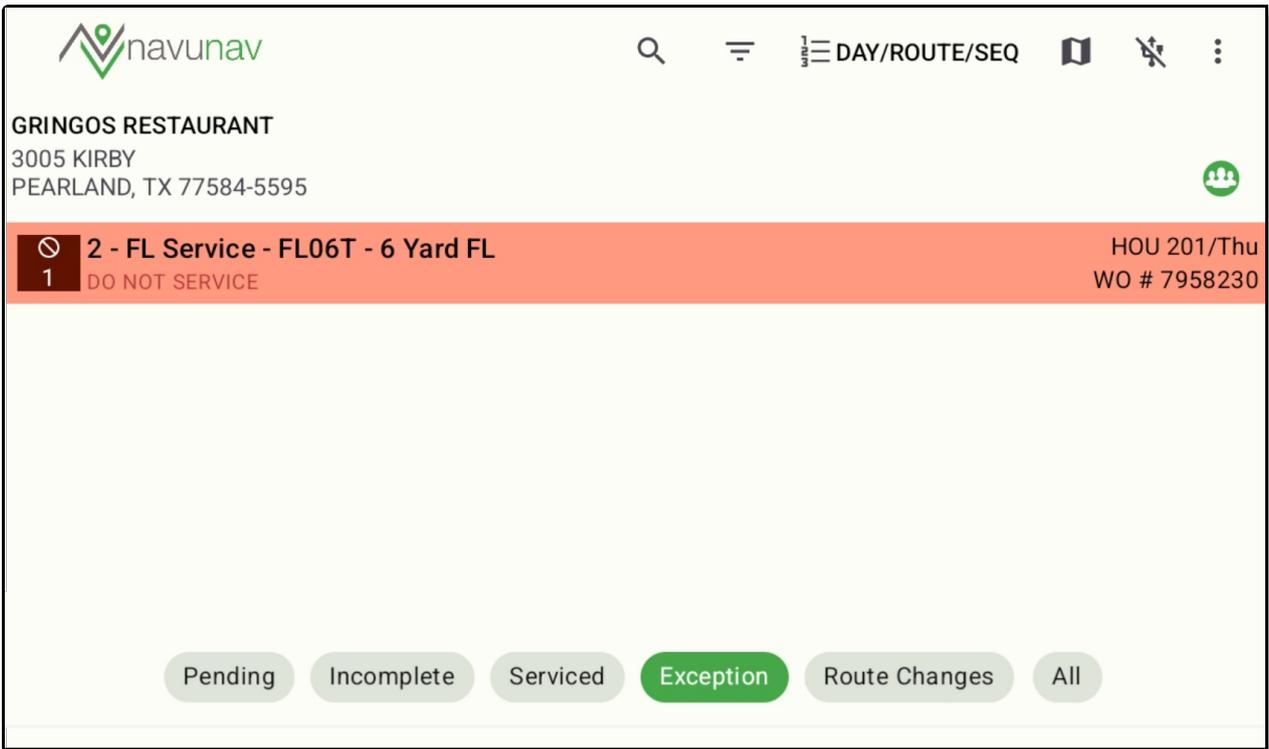
1. Right click on the applicable Active Service and select **Edit**.
2. Select **Chg.-Price Decrease** for the Reason Code.
3. Enter a **Start Date**. This should be the same date as the Effective Date entered for the Vacation Hold.
4. Enter **\$0.00** in the Per Unit field.
5. Click **Save**.

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.

