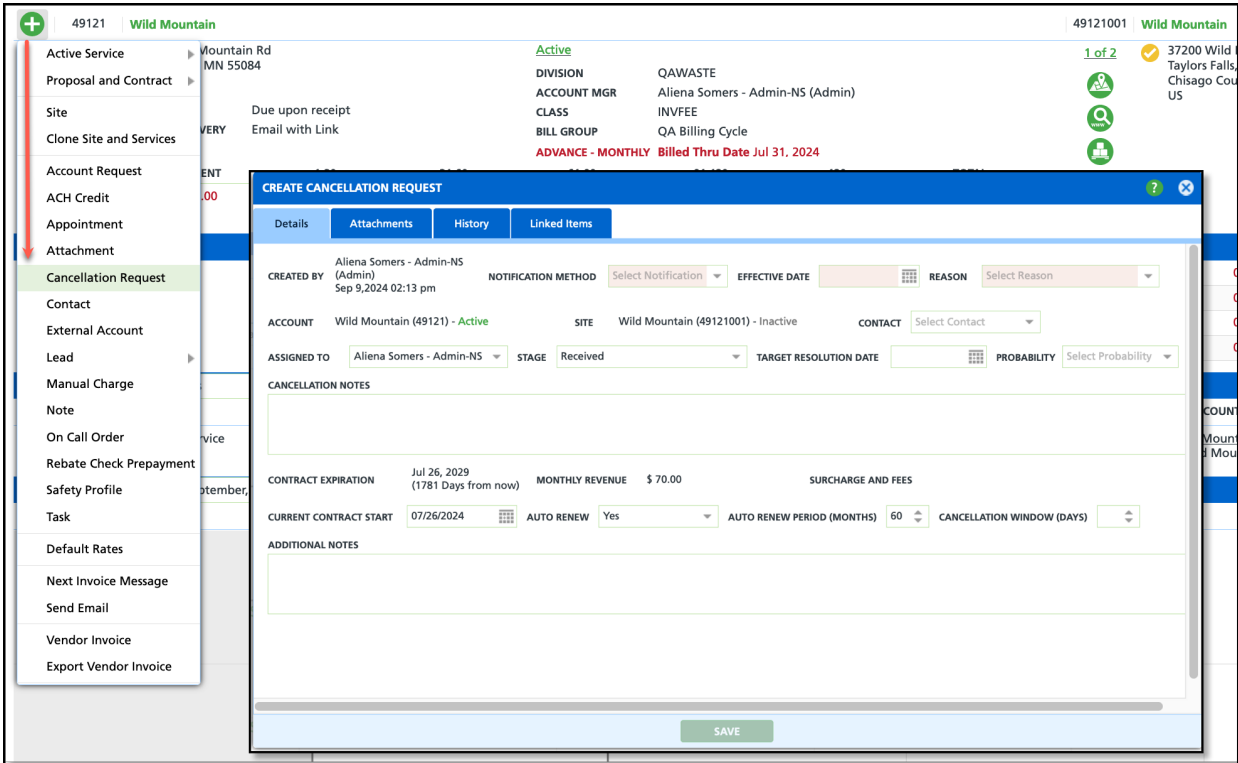# Cancellation Request

Last Modified on 09/29/2024 6:26 am EDT

Pathway: *Accounts > Account Menu > Cancellation Request*

The Cancellation Request screen is used to initiate the cancellation process for an account; however, cancellations must be applied directly to the active service, separate from the request itself. Once a cancellation request is created, it can be managed via the Cancellation Requests screen in *Sales > Pipelines > Cancellation Requests* or from the Pending section of the account.

Permissions

The following permissions apply to Cancellation Requests:

| Permission ID	Permission Name
162	Add Cancellation Request
163	Edit/Delete Cancellation Request

Field Descriptions

Field	Description
Created By	Displays the name and timestamp of the internal user who submitted the cancellation request on behalf of the customer.
Notification Method	Drop down selection to indicate the method through which the customer requested the cancellation.
Effective Date	Indicates the customer-requested service cancellation date. Entering a date here does not initiate the cancellation; cancellations must be applied directly to the active service.

|	
Reason	Indicates the reason provided by the customer for their service cancellation request.
Account	Displays the account name and ID along with the current status of the account.
Site	Displays the site the cancellation request applies to.
Contact	Identifies the point of contact on the account for further follow-up.
Assigned To	Identifies the internal contact or representative to whom the request is assigned.
Stage	Indicates the current stage of the cancellation request.
Target Resolution Date	Identifies a date the service should be saved by.
Probability	Indicates the probability the account can be saved.
Cancellation Notes	Text field so users can provide additional information or explanations related to the cancellation. Information entered here will help the account manager or other representative formulate a resolution.
Contract Expiration	Displays the date the contract for the current service will expire.
Monthly Revenue	Displays the monthly service revenue.
Surcharge and Fees	Displays any surcharges and fees associated with the service.
Current Contract Start	Indicates the start date of the current contract the customer has for the service.
Auto Renew	Indicates whether the contract is set to auto-renew.
Auto Renew Period (Months)	Displays the duration of the auto-renewal period for the contracted service.
Cancellation Window (Days)	Indicates the number of days a cancellation window applies.
Additional Notes	Option to include supplementary notes detailing discussions or reviews with the customer.

Attachments

Use the Attachments tab to include documents, such as emails or physical mail correspondences, related to the cancellation request. Attachments can only be added after the request has been created and saved.
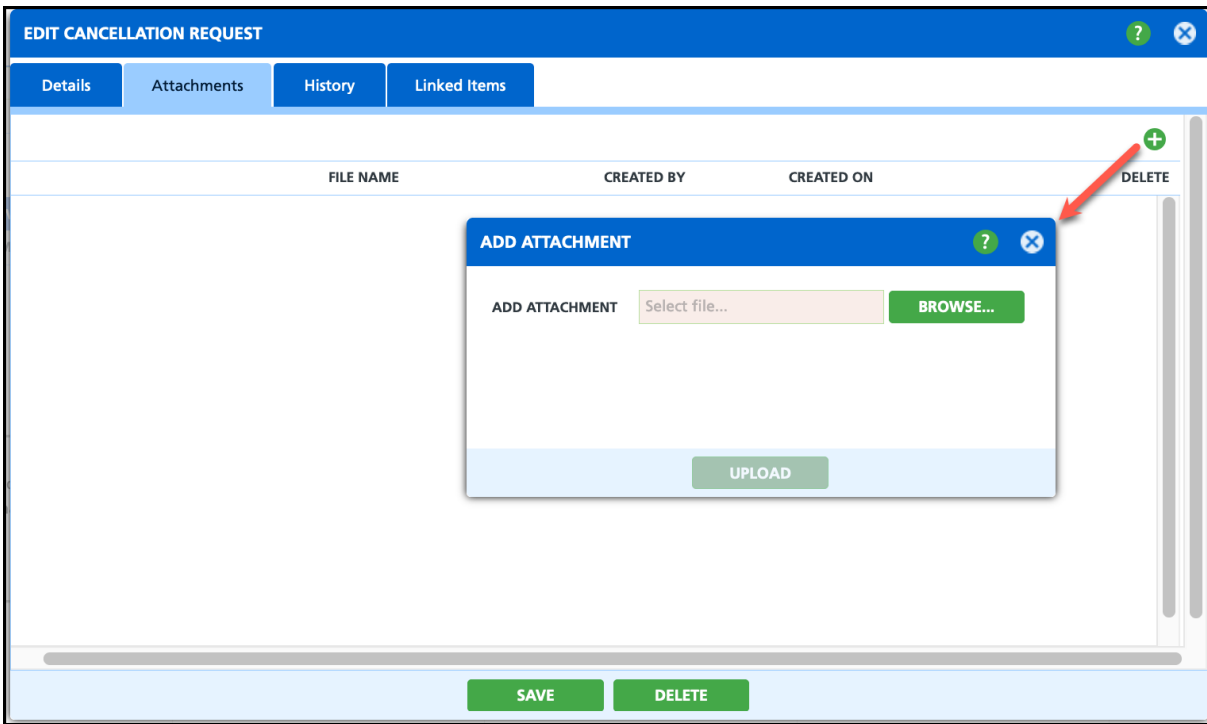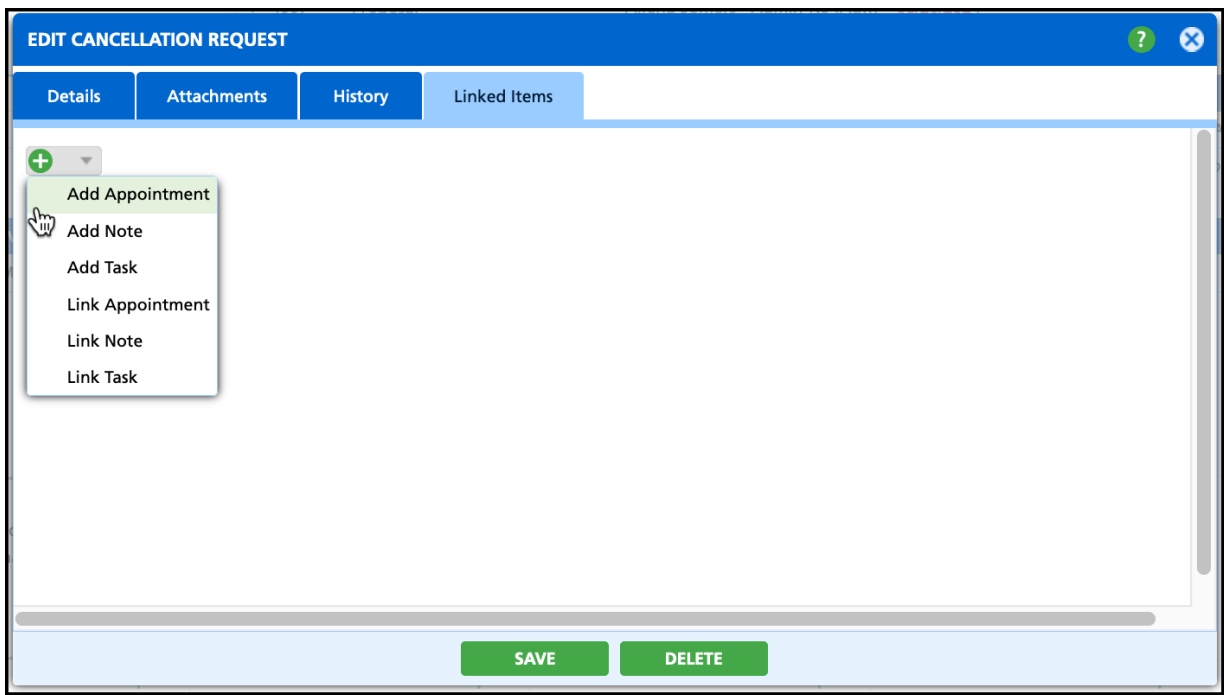
History

The History tab records any changes made to the cancellation request, including assignee updates and stage changes that reflect its current status.
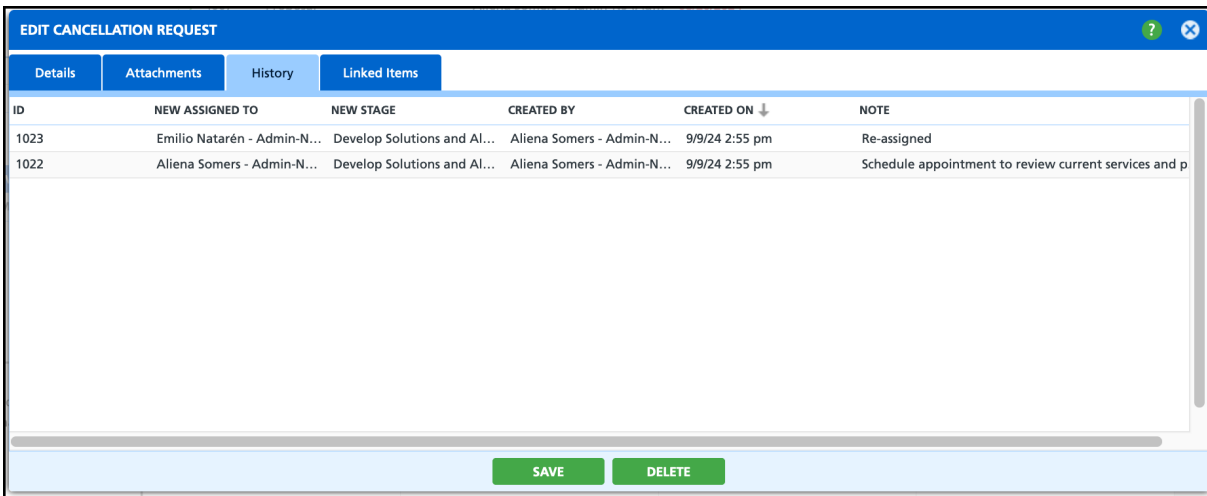
Linked Items

Use the Linked Items tab to create or link appointments, tasks and notes as they relate to the cancellation request.

Related Resources

Manage Cancellation Requests