# **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.

Active Service  Proposal and Contract Site Clone Site and Services	Vountaii MN 550 VERY		D A C B	CCOUNT MGR LASS ILL GROUP	QAWASTE Aliena Somers - Admin-NS (A INVFEE QA Billing Cycle Billed Thru Date Jul 31, 2024			37200 W Taylors F Chisago US
Account Request ACH Credit	ent .00	CREATE CANCELLATION R						(?) ⊗
Appointment		Details Attachmer	nts History Lin	ked Items				
Attachment Cancellation Request		Aliena Somer CREATED BY (Admin) Sep 9,2024 02	NOTIFICATIO	N METHOD Select No	effective DATE	REASON Sele	ect Reason	•
Contact External Account		ACCOUNT Wild Mounta	in (49121) - Active	SITE Wild M	puntain (49121001) - Inactive	CONTACT Select Contact	¥	
Lead 🕨		ASSIGNED TO Aliena So	mers - Admin-NS 👻 STAGE	Received	TARGET RESOL	UTION DATE	ROBABILITY Select Probabi	lity 👻
Manual Charge		CANCELLATION NOTES						- 1
Note								c
On Call Order	vice							M a
Rebate Check Prepayment Safety Profile	otember	CONTRACT EXPIRATION	Jul 26, 2029 (1781 Days from now) M	IONTHLY REVENUE \$	70.00 su	RCHARGE AND FEES		- 1
Task		CURRENT CONTRACT START	07/26/2024 AUT	TO RENEW Yes	- AUTO RENEW PERIO	D (MONTHS) 60 🌲 CANCELLATIO	WINDOW (DAYS)	- II
Default Rates		ADDITIONAL NOTES						·
Next Invoice Message								- 1
Send Email								
Vendor Invoice								
Export Vendor Invoice								- 8

### 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.

EDIT CANCEL	LATION REQUEST							? 8
Details	Attachments	History	Linked Items					
								0
		FILE NAM	E	CRE	ATED BY	CREATED ON		DELETE
			ADD	ATTACHMENT	i.		? ⊗	r
			ADD	ATTACHMENT	Select file		BROWSE	- 11
								- 11
								- 11
c					UPLC	DAD		
								- 11
				AVE	DELETE			

# History

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

EDIT CANCELI	LATION REQUEST					? 😣
Details	Attachments	History	Linked Items			
ID	NEW ASSIGNE	ED TO	NEW STAGE	CREATED BY	CREATED ON 🕹	NOTE
1023	Emilio Natar	rén - Admin-N	Develop Solutions and Al	Aliena Somers - Admin-N	9/9/24 2:55 pm	Re-assigned
1022	Aliena Some	ers - Admin-N	Develop Solutions and Al	Aliena Somers - Admin-N	9/9/24 2:55 pm	Schedule appointment to review current services and p
				SAVE DELE	ТЕ	

## **Linked Items**

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

EDIT CANCEI	LLATION REQUEST			?	8
Details	Attachments	History	Linked Items		
Add Not Add Task	c pointment e				
			SAVE	DELETE	

# **Related Resources**

Manage Cancellation Requests