

Cancellation Concepts and Terminology

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The workflow for processing customer cancellations depends mostly on your company's setup of Cancellation Profiles and Cancellation Tasks. When a new cancellation is initiated by a User, a Cancellation Profile must be selected. A **Cancellation Profile** is a descriptor of the type of situation that requires handling the cancellation in a particular manner. Linked to each Cancellation Profile is a list of **Cancellation Tasks**; the cancellation tasks define duties that should be completed before completing the customer cancellation. The most typical Cancellation Profile names are Non-Payment, Bankruptcy, Moved, and General (cancellation). The Non-Payment, Bankruptcy, and Moved profiles each probably contain a task list that is unique to the cancellation situation.

Another data entry field that is required when setting up a new customer cancellation is the Reason Code. This list of codes is stored within the SedonaOffice setup table *RMR Reasons*. This is a list of reasons why the customer is canceling or being canceled by your company. RMR Reasons are typically very descriptive of the reason for the cancellation. Cancellation reports may be produced that are grouped by RMR Reason code.

Typically one individual is responsible for monitoring a cancellation task list; this individual will check off tasks as they have been completed. Once all tasks on the task list have been checked off, the cancellation may be completed.

Important Note: Before finalizing any customer cancellation, the User should make certain there are no open service tickets, inspection tickets, or jobs on the customer account. These should all be invoiced and closed before the cancellation completion. All invoicing and credits to be processed must also be done before completing the cancellation. Once a customer is canceled, no invoices or credits may be generated on the account. The only activity that may occur on a canceled account is posting customer payments.

Cancellation Workflow

Below is a simple flow chart of the Cancellation process. Typically, many activities must occur before completing a cancellation according to your company's policies and procedures. The Cancellation Task list should include major steps that should not be forgotten in the process.

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