How to Cancel a Customer

Last Modified on 11/27/2023 8:26 am EST

New customer cancellations are initiated from the Client Management module. Select the Cancellations option within this module.

1. After selecting the Cancellations option within the Client Management module, the Cancellation Queue will be displayed. The Cancellation Queue lists all customers in the process of being canceled. Press the New button located at the lower right of this form to begin a new cancellation record.

2. The Customer Lookup form will be displayed to locate the customer account that will be set up for cancellation. Make a customer selection.

3. Once a customer is selected the Cancellation form will be displayed. The customer name and billing address will be displayed in the header section of this form and all active Sites associated with the Customer will be displayed in the center section of this form. Data entry fields are required in the header section of the cancellation form, each of which will be listed and described below. In addition to the Sites tab, there are two additional tabs of information in the center section of the Cancellation form; Tasks and Memo. Each of these will be described below.

Reference – This is a free-form text field where the User may enter up to 25 characters of information. This field is typically used in one of two manners: 1) for entering the central station account number(s) to be canceled or 2) for assigning a person responsible for working on this cancellation record. This field is optional.

Entered On & Entered By – These two fields are automatically filled in by the application. The name of the User creating the cancellation record will be saved in the Entered By field and the date/time the cancellation record was saved will fill into the Entered On field. These fields are system-controlled and cannot be modified.

Reason – The User will make a selection from the drop-down list that describes why the customer is being canceled. This is a required field.

Cancel Profile – The User will make a selection from the drop-down list that describes the situation for the cancellation so that the appropriate Cancellation Task list will be loaded. This is a required field.

Full Cancellation – Select this option if all recurring Sites for the Customer are to be canceled.

Notice Date – Enter a date or select a date using the calendar icon to the right of this field that indicates the date the customer notified your company of the cancellation. If your company is initiating the cancellation, indicate the date your company notified the customer.

Effective Date – This is the date on which any active recurring lines will end.

Follow-Up Date – Enter or select a follow-up date when a User should visit this cancellation record again. This date field is optional but recommended.

Important Note: If the cycle billing process will be generated before the completion of the customer cancellation and you do not want this customer to be invoiced again for recurring services, the User will have to open the Customer

Explorer record and manually cancel the recurring lines.

4. The Sites tab is for display only and will list all Sites associated with the customer being canceled. If contact information was set up on the System record for the site, any balance of the contract due will be listed in this area. The SedonaOffice application will not generate an invoice for the balance of the contract; this is provided for informational purposes only in the event your company will be invoicing the customer for these amounts.

The calculation for the balance of the contract looks at the contract start date and the initial [contract] months entered on the System record then looks at the cancellation effective date entered on the cancellation form to determine how many months are remaining on the contract (if any) and multiplies that quantity times the monthly recurring rate.

5. The Tasks tab will list all cancellation tasks that are linked to the Cancellation Profile which was selected in the header section of the cancellation form. As tasks are completed, the User will select the check box to the left of each task line. A cancellation may not be completed until all listed tasks have been checked off.

6. The Memo tab is used to record information relevant to the cancellation being processed. Any information entered into the Memo tab will be displayed on the Recurring History Record for the customer. A total of 256 characters may be entered into this field.

7. Once all required information has been entered into the header section of the Cancellation form, press the Save button located at the lower right of the form. The new cancellation record will be listed in the Cancellation Queue and will remain there until the cancellation has been completed or is manually removed.