SedonaSetup - CM - Cancellation Tasks

The Cancellation Tasks are linked to a particular Cancel Profile. For example, your company may have different methods of processing customer cancellations for residential or commercial type accounts or for handling different cancellation situations such as a move, cancel for non-payment or a takeover. In cases such as this you would create one Cancel Profile for each type. The Cancel Tasks are a checklist of items that must be approved to complete the customer cancellation. As the tasks are completed, each item is checked off by the person completing the task, or the person responsible for managing the cancellation. When all tasks have been checked off, the cancellation may be finalized and the recurring lines, if any will automatically be cancelled. If you do not want to use the Cancel Tasks, you may skip this step and just use the Cancellation Profiles.