How to Add New Tasks to Cancellation Profile

Last Modified on 09/13/2024 5:05 pm EDT

Issue:

Customer is looking to add new tasks to the cancellation profiles as a reminder to perform certain actions when going through the cancellation process.

Resolution:

To add a task in the cancellation process:

Go to SedonaSetup.

Go to Cancellation Tasks in the CM area

Sedona Setup	
Description	Area 🔺
Terms	AR
Cancellation Profiles	CM
Cancellation Tasks	CM
Chain Accounts	CM

Click New in the Cancellation Task window.

Enter information for New Task in the Cancellation Task and Description fields.

Cancellation Task Edit	Write Offe		_ [Ina <u>c</u> tive
Description	Write off outstanding invoices		-	
		Apply	<u>N</u> ew	Delete

Click Apply to save the new Task.

Go to Cancellation Profiles in SedonaSetup in the CM area.

Sedona Setup		
Description	Area	^
Terms	AR	
Cancellation Profiles	CM	
Cancellation Tasks	CM	
Chain Accounts	CM	

Select the Cancellation Profile, or create a new one, that you need to add the new task to.

When the profile is selected, mark the box next to the Cancel Task you need to add to the profile.

Profile	Description	Tasks	Inactive	
Moved	Moved	Y	N	
End Of Contract	End Of Contract	Y	N	
Test Profile	Test Profile	Y	N	
kjiji	kjiji	Y	N	
Recieved Pers 1st	hit apply once	Y	N	
Received PERS 1st	hit apply more than once	Y	N	
Customer By BY	Cant you see we don't want	Y	N	
no tasks	no tasks	N	N	
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Next time a customer is cancelled with this profile, it will include the newly added task.