

How To Add New Tasks to Cancellation Profile

09/13/2024 5:05 pm EDT

Issue:

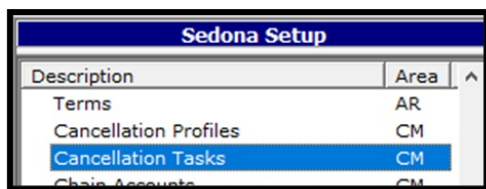
Customer is looking to add new tasks to the cancellation profiles as a reminder to perform certain actions when going through the cancellation process.

Resolution:

To add a task in the cancellation process:

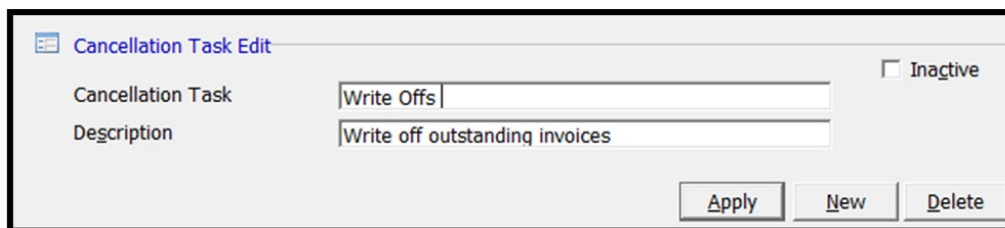
Go to SedonaSetup.

Go to Cancellation Tasks in the CM area



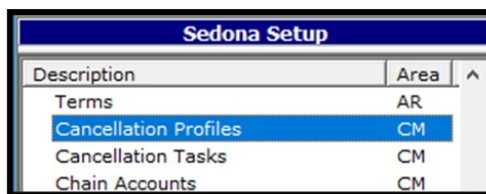
Click New in the Cancellation Task window.

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



Click Apply to save the new Task.

Go to Cancellation Profiles in SedonaSetup in the CM area.



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.

Cancellation Profiles

Cancellation Profiles List

Profile	Description	Tasks	Inactive
Moved	Moved	Y	N
End Of Contract	End Of Contract	Y	N
Test Profile	Test Profile	Y	N
kjjj	kjjj	Y	N
Received 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
Cancelled	Cancelled	Y	N

☐ Include Inactive

Cancellation Profile Edit

Profile

Cancelled

☐ Inactive

Description

Cancelled

☒ Use Tasks

Cancel Task	Description
☒ Remove Equipment	Remove Equipment
☒ Balance of Contract	Determine Balance of Contract
☒ Notify Salesperson	Notify Salesperson
☐ Schedule Service Call	Schedule Service Call
☐ Put in Collections	Put in Collections
☐ Cand Verification at CS	Cand Verification at CS
☐ Written notice sent to CS	Written notice sent to CS
☐ Received PERS Medallion	Received PERS Medallion
☐ Write off outstanding inv	Write off outstanding invoices
☒ Write Offs	Write off outstanding invoices

Apply

New

Delete

Next time a customer is cancelled with this profile, it will include the newly added task.