Deactivating a Customer Account

Use this workflow when a customer cancels with your company or moves out, so no new deliveries, service work, or recurring billing are created for the account.

Before You Deactivate

- Review the account balance and any open invoices, and follow company policy for collecting or crediting them.
- Check for scheduled or requested deliveries and service visits that should be cancelled.
- Review autopay, budget plans, service plans, and other subscriptions in Billing.

Deactivate an Account

1. Search for and open the correct customer account and service location.
2. Find the customer's active services on the account.
3. Cancel each active service so it is no longer active.
4. Refresh the account and confirm no active services remain.

> **Note:** A canceled or departed customer's service plans and subscriptions stop renewing. A service plan tied to a location the customer no longer occupies is cancelled automatically. To find the account later, turn on **Show Inactive** in Search.

Tenant Moved Out

When a tenant moves out, keep the service location with the primary customer, usually the owner, and remove it from the tenant's account.

1. Search for and open the tenant's customer account.
2. Select the gear to the left of **Overview**, then select **Location**.
3. Edit the attached location so it stays connected to the primary customer.
4. Save the change.
5. Cancel the tenant's active services, as described above.
6. Open the primary customer's account and confirm the service location and its systems are still attached.

> **Warning:** Deactivate only the account that is leaving. Before cancelling services, confirm the customer, the service location, and the relationship, so the primary customer's deliveries and service are not affected.

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