

Auto Cancel

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About Auto Cancel

Auto Cancel automatically schedules suspended services for cancellation. How long to wait to schedule cancellation, and when the scheduled cancellation will happen are configurable.


Tie-Ins*

| Widgets | Nav Links | Client Cards | Automation Tasks | Email Templates | ACL Permissions | Search | Ev |
|---------|-----------|--------------|------------------|-----------------|-----------------|--------|----|
| NONE | NONE | NONE | YES | NONE | NONE | NONE | |

* Plugins are powerful and are not limited to the tie-ins listed above, these are just some of the most common

Installing Auto Cancel

To install the Auto Cancel plugin, visit [Settings] > [Company] > [Plugins] > Available, and click the "Install" button for Auto Cancel.




Auto Cancel (ver 1.4.0)

Author: Phillips Data, Inc.

Automatically schedules services for cancellation.

Install

A message will be displayed, indicating that the plugin was successfully installed.




The plugin was successfully installed. It may have registered ACL permissions for various resources. You may need to grant your staff group access to these permissions in order to access these resources.

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Plugins

Installed

Available



Auto Cancel (ver 1.4.0)

Author: Phillips Data, Inc.

Automatically schedules services for cancellation.

Manage

Settings

Disable

Uninstall

Configuration

By default, automatic cancellation of services will not happen until the Auto Cancel Plugin has been configured. Click the "Manage" button for the plugin under [Settings] > [Company] > [Plugins] > Auto Cancel

Auto Cancel

Settings

Schedule Cancellation Days After Suspended

Never

Cancel Services Days After Suspended

Never

Save

| Field Name | Possible Values | Description |
|--|-----------------|--|
| Schedule Cancellation Days After Suspended | Never, 0-60 | When a service has been suspended for this many days, it will be scheduled for cancellation. |

| | | |
|--------------------------------------|---|---|
| Cancel Services Days After Suspended | Never, 0-60 (Should be >= above option) | When scheduling a service for cancellation, the cancellation should be set for this number of days after the service was originally suspended. Should be equal to or greater than the above option. |
|--------------------------------------|---|---|

Automation Tasks

Auto Cancel registers an Automation Task under [Plugins] > [Auto Cancel] > [Settings] > [Automation] called Auto Schedule Cancellation. It may be desirable to change the time at which the task runs such that it runs shortly after your Suspend Services task would normally complete.

Auto Cancel

Automation

Actions

Events

The plugin has registered the below automation tasks to perform certain actions when run by cron.

Auto Schedule Cancellation

Automatically schedules suspended services for cancellation.

☒ Enabled

Update Settings