

Cancelling Client Accounts

When canceling a client's account there are a couple of different methods available. Which one you use will really depend on personal preference.

Steps

Set the End Date for the Service

Editing a service and setting an end date effectively tells Ubersmith when to stop billing for that item. After that date, the service will no longer renew or be invoiced by the system. Any outstanding invoices that contain the service will remain outstanding and can still be paid after the end date of the service is reached. On the end date of the service, when the daily invoicing script runs, Ubersmith will automatically update the service and set its status to canceled. If a client isn't canceling right away but instead at some pre-set date in the future, this is the best method to use.

Cancel the Service

If you edit the service and change its status to canceled, Ubersmith will no longer renew or invoice that service. It will essentially be turned off. Any outstanding invoices in the client's account can still be paid and collected on after the cancellation. If client is being canceled for non-payment and they are at all likely to come back and pay up and reactivate their account, canceling their service is probably the best option.

Deactivate the Service

Deactivation is a permanent change that essentially kills the service. It is no longer renewed or invoiced. Any outstanding invoices with the service in it will automatically be credited the amount due for that item. This is a permanent change that can not be undone. If the client is just canceling one particular item for good and don't still owe you anything, deactivating the service is a good option.

Deactivate the Client

If the customer has completely canceled and there is nothing left to be collected from them, using the 'deactivate client' link will give you the option to deactivate the entire account at once. Any active services will be deactivated and any outstanding invoices will be disregarded. While it is possible to reactivate the client once deactivated, you pretty much only want to do this one if you're certain they're never coming back. If the customer is gone for good, deactivating the client account takes care of everything at once.

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