

Add Waste Profile To A Site

Last Modified on 03/15/2024 1:24 pm EDT

Pathway: [Accounts](#) > [Account \(screen\)](#)

This article details how to add a waste profile to a site and link it to a charge code for an active service. Waste profiles are added in two ways:

1. From the Photos, Attachments, Blanket Purchase Orders and Waste Profiles screen
2. From a Service Code

The screenshot displays the 'LouLou Doctor Service' account details. At the top, there are two account cards for '48911 LouLou Doctor Service'. The left card shows account details like address (1234 Tylersville Rd, West Chester, OH 45069-1010 US), terms (Net 20), invoice delivery (Printed), and a balance table. The balance table shows a current balance of -100.00 and a total of 209.85. The right card shows account manager (Dave Hulvey), class (MEDICAL), and bill group (DAY-COMM MONTHLY ARREARS). Below the account cards is a 'HIGHLIGHTS' section with a warning: 'Account is significantly past due'. The 'ACTIVE SERVICES (3)' section is expanded to show three services: 'Regulated Medical Waste Service', 'Medical Waste - WO MIN when completed', and 'Hazardous Waste Services'. The 'Hazardous Waste Services' row is highlighted with a red box and includes details for '15 Gal Flammable Solvents (Methanol)' and '5 Gal Flammable Liquid (Xylene, Alcohol)', both at \$0.00 each. The reason for the addition is 'ADD-Add Svc - New Service' and it was posted by Lori Swenson on 09/05/2023.

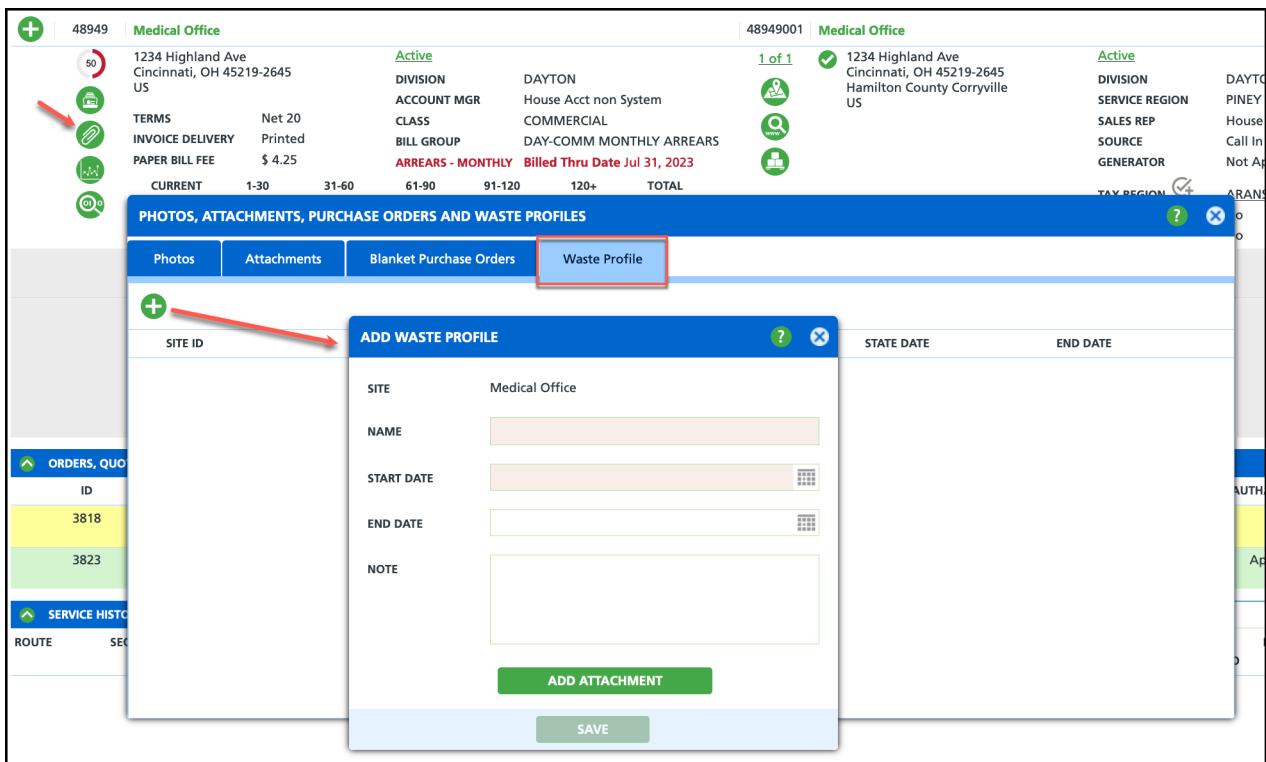
Permissions

The following permissions are required to add/edit waste profiles:

Permission ID	Permission Name
5	View Account
6	View Site

Add A Waste Profile From Account Details

To view a list of all waste profiles for a site and add new waste profiles, select the paperclip icon from customer service screen.



1. Select the Paperclip icon displayed in the customer's account. This displays the 'Photos, Attachments and Waste Profiles' popup editor.
2. Select the **Waste Profile** tab.
3. Select the **green '+' icon** to display the *Add Waste Profile* popup editor.
4. Enter a **Name** for the Waste Profile and **Start Date**.
 - Additional options such as adding a Note to the waste profile, or an attachment are available but are not required.
5. Click **Save** and close the popup.

Add Waste Profile From Service Code

If a service code already has a waste profile associated to it, the option to add additional waste profiles is available.

48911 LouLou Doctor Service 48911001 LouLou Doctor Service

1234 Tylersville Rd
West Chester, OH 45069-1010 US

Active

DIVISION DAYTON
ACCOUNT MGR Dave Hulvey
CLASS MEDICAL
BILL GROUP DAY-COMM MONTHLY ARREARS
ARREARS - MONTHLY Billed Thru Date Jul 12, 2023

1 of 1

1234 Tylersville Rd
West Chester, OH 45069-1010
(O) +1 513-555-6565

TERMS Net 20
INVOICE DELIVERY Printed
PAPER BILL FEE \$ 4.25

CURRENT	1-30	31-60	61-90	91-120	120+	TOTAL
-100.00	0.00	0.00	0.00	0.00	309.85	209.85

Auto Pay Not Enabled

HIGHLIGHTS PENDING

Account is significantly past due

ACTIVE SERVICES (3) Standard TOTAL RECURRING \$ 0.00

QTY	SERVICE CODE	SERVICE ID	FREQUENCY	SCHEDULE	PER UNIT RATE	RATE
1	Regulated Medical Waste Service	DCF4	1x per week	W	\$ 0.00	\$ 0.00 per month
1	Medical Waste - WO MIN when completed	7612	1x per week	H	\$ 0.00	\$ 0.00 per month
1	Hazardous Waste Services	F42B	1x per week	M	\$ 0.00	\$ 0.00 per month

Reason: ADD-Add Svc - New Service
Billed By: Lori Swanson on 09/05/2023

LINK WASTE PROFILE

9b.1. Approval Code: 197916 - Effective: 07/07/2022 - Expires: 07/07/2032	-
9b.2. Approval Code: 197912 - Effective: 07/07/2022 - Expires: 07/07/2032	-
9b.3. Approval Code: 197910 - Effective: 07/07/2022 - Expires: 07/07/2032	-
Expired waste profile - Effective: 09/01/2023	+
Expired waste profile - Effective: 09/01/2023 - Expires: 03/31/2024	+

1. Expand the **Service Code** from the Active Services section of the site.
2. Select the **Hazardous Waste** icon. This will display the 'Link Waste Profile' popup editor.
3. Select the green '+' icon. This will display the Add Waste Profile popup editor.
4. Enter a **Name** for the Waste Profile and **Start Date**.
 - o Additional options such as adding a Note to the waste profile, or an attachment are available but are not required.
5. Click **Save** and close the popup editor.