

Default Rate Setup (Service Code)

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Pathway: Setup > Services > Default Pricing > Service Code | Setup > Services > Service Code

Create default rates for a service code specific to the division, service region and frequency of the service. A service code may have more than one default rate linked to it. After a default rate has been established for a service code, review the service code's pricing model to verify it is using the default setting.

Permissions

Permission ID	Permission Name
118	Setup / Services

Step 1: Create a Default Rate

Pathway: Setup > Services > Default Pricing > Service Code

The *Service Code Default Rate Setup* screen defines when a default rate is applied to a service code. The default rate is only applied when the service code is added to an active service if the Division, Service Region, and Frequency of the service code match those of the active service.

The screenshot displays the 'SERVICE CODE DEFAULT RATE SETUP' interface. At the top, there are filters for LOB (Commercial), EQUIPMENT (All), DIVISION (All), and SERVICE REGION (CORPUS OPEN MARKE), along with a 'LOAD' button and a 'HIDE EXPIRED PRICING' checkbox. Below the filters is a table with columns: SERVICE CODE, DESCRIPTION, SERVICE REGION, EQUIPMENT TYPE, MATERIAL TYPE, FREQUENCY, FIRST ITEM, ADDITIONAL QUANTITY, RATE UOM, and EFFECTIVE DATE. Two rows are visible, both for '10 Yard Trash Service' with different frequencies. A red box highlights a green '+' icon in the top left corner of the table area. A red arrow points from this icon to a 'ADD SERVICE CODE DEFAULT RATE' popup window. The popup window contains several input fields: SERVICE CODE, DIVISION, SERVICE REGION, FREQUENCY, FIRST ITEM RATE, ADDITIONAL QUANTITY RATE, and EFFECTIVE DATE. The 'SERVICE CODE', 'DIVISION', 'SERVICE REGION', and 'FREQUENCY' fields are highlighted in red. A 'SAVE' button is located at the bottom of the popup.

Add a Default Rate

1. Select the green '+' icon from the upper left corner of the Service Code Default Rate Setup screen. The 'Add Service Code Default Rate' popup window will display.
2. Review each of the fields and select what applies. Fields highlighted in red are required and must have a selection to Save.
3. Select **Save** when finished.

Step 2: Review the Service Code's Pricing Model

Pathway: Setup > Services > Service Code

In the Service Code Setup, the Pricing Model field must be enabled for the service code to which a default rate applies. Each service code has its own specific Pricing Model. To apply the default rate, the Pricing Model must be set to 'None.'

The screenshot displays the 'SERVICE CODE SETUP' window with a list of service codes on the left and a detailed 'ADD SERVICE CODE' dialog box in the center. The dialog box has two tabs: 'Service Code' and 'Surcharges'. The 'Service Code' tab is active, showing various configuration fields. The 'PRICING MODEL' field is highlighted with a red box and is set to 'None'. Other fields include SERVICE CODE, NAME, LINE OF BUSINESS, EQUIPMENT TYPE, MATERIAL TYPE, UOM, TAXABLE, GL ACCOUNT, TEMPORARY SERVICE GL ACCOUNT, PRORATION METHOD, VACATION HOLD PRORATION METHOD, BILL WHILE ON CREDIT HOLD, IS AP TRANSACTION, EST MONTHLY VOL UOM, IS SHELL, CALCULATE RATE PER YARD, WORK TYPE EVENT CLASS, and BILL ZERO AMOUNT. The background shows a list of service codes with columns for ID, NAME, LINE OF BUSINESS, EQUIPMENT TYPE, MATERIAL TYPE, UOM, IS TAXABLE, TAXABLE CLASS, GL ACCOUNT, TEMPORARY SERVICE GL ACCOUNT, PRORATION METHOD, and VACATION PRORATION METHOD.

Update Pricing Model

1. Double-click on the ID of the Service Code you would like to update to open the 'Update Service Code' popup editor.
2. Select the Service Code tab.
3. Select 'None' from the Pricing Model drop down.
4. Click away and the system will auto-save the change.