Work Type Default Charge Codes

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The following article details the setup to define and limit what charge codes are added to different types of work orders.

Permissions

The following permissions apply:

Permission ID	Permission Name
24	Setup / Operations
118	Setup /Services

Setup: Line of Business

Pathway: *Setup > Services > Line Of Business > Update Line of Business*

For each Line of Business default charge codes apply, the 'Enable Work Type Default Charge Codes' must be set to 'Yes'. To update, double click on the line of business and the Update Line of Business editor will display.

LINE OF BUSINESS SETUP

ID	NAME	SCREEN TYPE	ENABLE MANIFEST PROCESSING	GL SEGMENT	WORK ORDER MINIMUM CHARGE CODE	OVER MAX-WEIGHT CHARGE CODE	UNEARNED REVENUE GL ACCOUNT	ENABLE USED OIL COLLECTION	AUTO COMPLETE SECONDS	DAYS AVAILABLE TO DRIVER	RECEIPT HEADER TEXT	ACKNOWLEDG... TEXT	ACTIVE
DOCDEST	Document Destruc...	1	No	DOC			Unearned Rev...	No	5	Today Only			Yes
FEL	Commercial	1	No	D100			Unearned Rev...	Yes	5	Yesterda...			Yes
HAZ	Hazardous Material	1	No	HAZ			Sales Tax Payable	No	5	Last, Curr...			Yes
INACTIVE	INACTIVE LOB	1	No					No	5	Today Only			No
LF	Inbound and Out...	1	No	80			Account Payab...	No	5	Yesterda...			Yes
MEDICAL	Medical Waste	1	Yes	RMW	Minimum Se...	Over Weight...	Unearned Rev...	No	5	Yesterda...	Receipt head...	This is LOB a...	Yes
MISC	Miscellaneous	1	No	12345678...			Unearned Rev...	No	5	Yesterda...			Yes
RESI	Residential	1	No	D200			Unearned Rev...	No	5	Yesterda...			Yes
RO	Roll Off	1	No	D300	Minimum Se...		Unearned Rev...	No	5	Yesterda...			Yes
SCALE	Scale	1	No	SCL			Unearned Rev...	No	5	Today Only			Yes
UO	Used Oil Collection	1	Yes					Yes	5	Today Only			Yes

Service Frequencies	Navul lav Available Extra Charges	Division Specific

FREQUENCY TYPE

ACTIVE FREQUENCIES ONLY

TYPE	FREQUENCY	DESCRIPTION	SHORT DESCRIPTION
On Call			
Times per week			
Times per week			
Times per week			

UPDATE LINE OF BUSINESS

LOB ID   RO

NAME   Roll Off   ACTIVE   Yes

Settings	Mobile	Optimization	Self-Service Ordering	Productivity and Profitability

SCREEN TYPE	1	ENABLE USED OIL COLLECTION	No
GL SEGMENT	D300	ENABLE PROACTIVE ROUTE STATUS DRIVER CHECK	No
UNEARNED REVENUE GL ACCOUNT	Unearned Revenue	ENABLE MANIFEST PROCESSING	No
WORK ORDER MINIMUM CHARGE CODE	Minimum Service Charge	ENABLE MANIFEST GROUP WEIGHT ROUNDING	No
OVER MAX WEIGHT CHARGE CODE		ENABLE ACTIVE DISPATCH	Yes
RENTAL CHARGE CODE	Inactivity Fee	ENABLE CHARGE CODE WASTE CODES	No
RECURRING MINIMUM CHARGE CODE	Roll Off Service Minim	ENABLE WORK TYPE DEFAULT CHARGE CODES	Yes
LIMIT CHARGE CODE TO MATCHING EQUIPMENT	No	ENABLE BIC REPORTING	No
LIMIT CHARGE CODE TO MATCHING MATERIAL	No	ENABLE LABOR TRACKING	No
INVOICE SUMMARY DESCRIPTION	This is a test. RO LOB Setup		
PRODUCTIVITY UNIT NAME			

Setup: Work Type

Pathway: *Setup > Operations > Work Type Set Up > Update Work Type*

Work Type Setup controls which default charge codes are automatically applied for a designated work type. Use the Line Of Business filter at the top of the screen to limit what displays. Double click on the work type to open the Update Work Type editor.

ID	NAME	LOB	ACTION CATEGORY	INVENTORY MOVE TYPE	MANIFEST NOTIFICATION TEMPLATE	ORDER BASELINE SECONDS	DEFAULT SECONDS PER UNIT	CREATE ONE SERVICE RECORD PER QUANTITY	ENABLE DISPOSAL ENTRY	ENABLE DRIVER ENTERED LABEL WEIGHTS	ENABLE DRIVER PHOTO PROMPT	PRODUCTIVITY UNITS	ENABLE DRIVER TO SET IN PROGRESS
DDSVC	Document Destruct...	Document ...	Swap	None			0	No	No	No	Yes	1	No
DEL_HAZ	Deliver HAZ	Hazardous ...	Delivery	None			0	No	No	No	No	1	No
DUMPONLY	Dump Only	Roll Off		None			0	Yes	Yes	No	No	1	No
FL_DELIVER	FL Delivery	Commercial	Delivery	Delivery			0	No	Yes	No	No	1	No
FL_EXCHNGE	FL Exchange	Commercial	Swap	Exchange			0	No	No	No	No	1	No
FL_EXTRAPU	FL Extra Pick Up	Commercial	Pick Up	None			0	No	No	No	No	1	No
FL_MISSED	FL Missed Pick Up	Commercial		None			0	No	No	No	No	1	No
FL_MOVE	FL Move	Commercial								No		1	No
FL_RELOCAT	FL Relocate	Commercial								No		1	No
FL_REMOVE	FL Removal	Commercial	Removal							No		1	No
FL_REPAIR	FL Repair	Commercial	Repair							No		1	No
FL_SERVICE	FL Service	Commercial								No		1	No
INBOUNDLD	Inbound Load	Inbound an...	Inbound / R.							No		1	No

Alerts | **Surcharges**

NOTIFICATION	TYPE	SCHEDULE
Order Creation		Immediate
Vendor Order		Manual
Service Rescheduled		Immediate
Service Status Change	In Progress	Immediate
Service Status Change	Completion	Immediate
Service Status Change	Completion	Immediate

UPDATE WORK TYPE

Details | NavuNav Settings | Add/Remove Default Charge Code

FL Delivery   Search

NAME	
Adjustment-Commercial	🟢
Bulk Pickup	🟢
Front Load Installation Fee	🟢
Front Load Delivery	🟢
Front Load On Call	⚪
Front Load Overload Charge	⚪
Front Load Relocate	⚪
Front Load Removal	⚪
Front Load Repair	⚪
Front Load Repair Parts	⚪
Front Load Swap	⚪
Front Load Extra Pickup	⚪
Imported AR	⚪
Paper Bill Fee - Commercial	⚪
Municipal Commercial	⚪
Enclosure Charge per Lift	⚪
Front Load 02YD Extra Pickup	⚪
Front Load 03YD Extra Pickup	⚪
Front Load 04YD Extra Pickup	⚪
Front Load 06YD Extra Pickup	⚪
Front Load 08YD Extra Pickup	⚪
Front Load 10YD Extra Pickup	⚪

SAVE

Add or Remove Default Charge Codes:

1. Double click on the Work Type to display the *Alerts* and *Surcharges* tab.
2. Select the Add/Remove Default for Charge Code tab.
    - Use the toggle switches to add or remove. To add, toggle the switch to green.
3. Click **Save** when finished. Repeat this process for each work type that should include default charge codes.

Setup: Charge Code

Pathway: *Setup > Services > Charge Code > Update Charge Code*

Use the Charge Code Set Up screen to add or remove Work Types using the Default for Work Types tab.

1. Double click on the Charge Code you would like to update to open the 'Update Charge Code' editor.
2. Select the 'Default for Work Types' tab.
    - Using the toggle switches, add and remove default work types to the charge code.