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.

	SS SETUP										SETUP > SE	RVICES > LINE OF I
⊕												
D	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
DOCDEST	Document Destruc	. 1	No	DOC			Unearned Rev	No	5	Today Only		
FEL	Commercial	1	No	D100			Unearned Rev	Yes	5	Yesterda		
HAZ	Hazardous Material	1	No	HAZ			Sales Tax Payable	No	5	Last, Curr		
INACTIVE	INACTIVE LOB	1	No					No	5	Today Only		
LF	Inbound and Out	1	No	80			Account Payab	No	5	Yesterda		
MEDICAL	Medical Waste	1	Yes	RMW	Minimum Se	Over Weight	Unearned Rev	No	5	Yesterda	Receipt head	This is LOB a
MISC	Miscellaneous	1	No	12345678			Unearned Rev	No	5	Yesterda		
RESI	Residential	1	No	D200			Unearned Rev	No	5	Yesterda		
RO	Roll Off	1	No	D300	Minimum Se		Unearned Rev	No	5	Yesterda		
SCALE	Scale	1	No	SCL			Unearned Rev	No	5	Today Only		
Service Freq	uencies Navula	av Available - 🛛	Extra Charges	Division Sp	pecific						ACTIVE F	REQUENCIES ONLY
ТҮРЕ		FREQUE	NCY		DESCRIPTION			SH	ORT DESCRIPTI	ON		
On Call			E OF BUSINESS									
Times per wee	k											
Times per wee	k	LOB ID	RO									- 1
Times per wee	k	NAME	Roll Off				ACTIVE	res	-			- 1
		Settings	Mobile	Optimizati	ion Self-S	iervice Ordering	Productivity	and Profitability				[
		SCREEN TYP	E		1		- ENABLE USED O	DIL COLLECTION		No		-
		GL SEGMEN	т		D300		ENABLE PROAC	TIVE ROUTE STATUS	DRIVER CHECK	No		·
		UNEARNED I	REVENUE GL ACCO	JNT	Unearned	Revenue 👻 (S ENABLE MANIF	EST PROCESSING		No		-
		WORK ORDE	ER MINIMUM CHAR	GE CODE	Minimum S	Service Charge	ENABLE MANIF	EST GROUP WEIGHT	ROUNDING	No		~
		OVER MAX V	WEIGHT CHARGE CO	DDE			ENABLE ACTIVE	DISPATCH		Yes		·
		RENTAL CHA	ARGE CODE		Inactivity F	ee	ENABLE CHARG	SE CODE WASTE COD	ES	No		~
		RECURRING	MINIMUM CHARGE	CODE	Roll Off Se	rvice Minin 👻 🤇	S ENABLE WORK	TYPE DEFAULT CHAP	RGE CODES	Yes		·
		LIMIT CHARGE CODE TO MATCHING EQUIPMENT			T No	No ENABLE BIC REPORTING				No		·
		GE CODE TO MATCH	ING MATERIAL	No		ENABLE LABOR	TRACKING		No		·	
		INVOICE SUM	MMARY DESCRIPTIC	DN	This is a te	st. RO LOB Setup						
		INVOICE SUM	MMARY DESCRIPTIC	DN	This is a te	st. RO LOB Setup						

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.

WORK TYPE SE	ETUP											SETU	P > OPERATION	S > WORK TYPE
	OF BUSINESS	All				Ŧ								Ð
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 ENA ENTERED LABEL PHO WEIGHTS	ABLE DRIVER DTO PROMPT	PRODUCTIVITY UNITS	ENABLE DRIVER TO SET IN PROGRESS
DDSVC	Document Des	struct	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 U	Jp	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		UPDATE W	ORK TYPE					? 😣	No	1	No
FL_RELOCAT	FL Relocate		Commercial			1						No	1	No
FL_REMOVE	FL Removal		Commercial	Removal	Details	NavuNav S	ettings	Add/Remove De	efault Charge C	ode		No	1	No
FL_REPAIR	FL Repair		Commercial	Repair								No	1	No
FL_SERVICE	FL Service		Commercial		FL Delivery	/				Searc	h Q	No	1	No
INBOUNDLD	Inbound Load		Inbound an	Inbound / R.	NAME							No	1	No
Alerts	Surcharges				Adjustment	-Commercial								
NOTIFICATION	TY	/PE		SCHEDULE	Bulk Pickup									
Order Creation	n			Immediate	Front Load	Installation Fee								
Vendor Order				Manual	Front Load	Delivery								
Service Resche	eduled			Immediate (Front Load	On Call					0	NO #@@wo	rkorder.numbe	er;;
Service Status	Change In	Progres	5	Immediate (Front Load	Overload Charge					0	# @@work	order.number;	
Service Status	Change Co	ompletio	n	Immediate (Front Load	Relocate					0			
Service Status	Change Co	ompletio	n	Immediate (Front Load	Removal					0			
					Front Load	Repair					0	_		
					Front Load	Repair Parts					0			
					Front Load	Swap					0			
					Front Load	Extra Pickup					0			
					Imported A	R								
					Paper Bill Fe	e - Commercial					0			
					Municipal C	ommercial								
					Enclosure C	harge per Lift								
					Front Load	02YD Extra Pickup	0							
					Front Load	D3YD Extra Pickup	0							
					Front Load	04YD Extra Pickup	0							
					Front Load	DEYD Extra Pickup	0							
					Front Load	DOYD Extra Pickup	.					1		
	NAME LOB ACTH CATE VVC Document Destruct Document Swa HAZ Deliver HAZ Hazardous Deliv MPONLY Dump Only Roll Off Deliver DELIVER FL Delivery Commercial Deliv EXCHNGE FL Exchange Cammercial Swa EXTRAPU FL Extra Pick Up Commercial Rem RELOCAT FL Relocate Commercial Rem REMOVE FL Removal Commercial Rem REPAIR FL Repair Commercial Rem REPAIR FL Repair Commercial Rem Surcharge Surcharge Inbound an Inbound an Inford Order VTPE ScH rice Rescheduled Innervical Innervical Innervical rice Status Change In Progress Innervice Status Change Completion rice Status Change Completion Innervice Innervice			Front Load	IUTU Extra Pickuj	J					1			
					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.

CHARGE	CODE SETUP									SETUP > 1	SERVICES > CHAR	GE CODE
Ð	LINE OF BUSINESS	Commercial	~	EQUIP TYPE	All	▼ MATERIAL TYP	e All	Ŧ	🧹 Hide Inactive		Search	
ID	NAME 1	t i		DOT D	ESCRIPTION	LINE OF BUSINESS	EQUIPMENT TYPE	MATERIAL	TYPE RATE UOM	IS TAXABLE	TAXABLE CLAS	\$ S
ADJ-CO	Adjustr	ment-Commercial				Commercial			each	Yes		Ser
FLBULK	Bulk Pi	ckup				Commercial		MSW	each	Yes		Ser
FL02XP	Front L	oad 02YD Extra Pickup				Commercial	2 Yard FL		each	Yes		Ser
FL03XP	Front L	ad 03YD Extra Pickup		Issue:	Account: Site: Steps to	Commercial	3 Yard FL		each	Yes		Ser
FL04XP	Front L	.oad 04YD Extra Pickup				Commercial	4 Yard FL		each	Yes		Ser
FL06XP	Front L	.oad 06 UPDATE CHAR	GE CODE								? 😣	Ser
FL08XP	Front L	.oad 08	_									Ser
FL10XP	Front L	oad 10 Charge Code	Su	rcharges	Default for Work Type	es						Ser
FLDEL	Front L	.oad De										Ser
FLIINSTA	LL Front L	oad Ins							ADD ALL WORK TYPES	REMOVE ALL WO	ORK TYPES	Ser
FLONCAL	LL Front L	oad Or NAME										Ser
FLOVRLC	DAD Front L	oad Ov FL Move										Ser
FLRELOC	ATE Front L	oad Re FL Missed Pick U	р									Ser
FLREM	Front L	oad Re FL Delivery										Ser
FLREPAIR	R Front L	oad Re FL Exchange										Ser
FLREPAIR	RPT Front L	oad Re FL Extra Pick Up										Ser
FLSWAP	Front L	oad Sw FL Relocate										Ser
IMPORTA	AR Import	ed AR FL Removal										Acc
COMUNI	Munici	pal Cor FL Repair										Ser
PAPER_C	OM Paper E	Bill Fee FL Service										0
_		new1										
		TEST										

- 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.