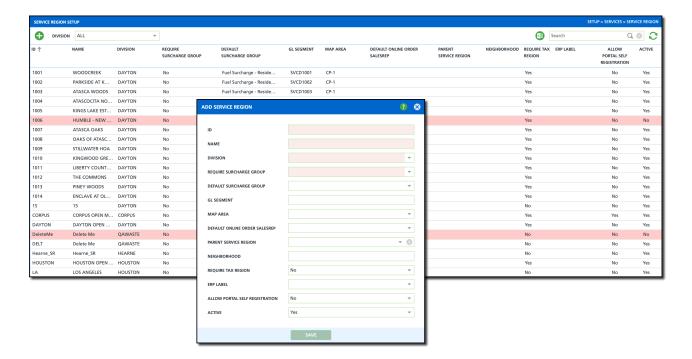# Service Region Setup

Last Modified on 09/23/2024 9:28 am EDT

Pathway: *Setup > Services > Service Region*

Service Regions are smaller geographic areas that make up a Division and are assigned at the site-level. Service Regions provide flexibility in auto-assigning surcharges to sites and assist in areas of operations, accounting, billing and reporting.

Permissions

The following permission is required to add and edit in the Service Region Setup screen:

Permission ID	Permission Name
26	Setup / Services

Field Descriptions

Fields	Descriptions
ID *Required*	The 10 character ID number for this Service Region.
Name *Required*	Name of the Service Region.
Division *Required*	Identifies the Division a Service Region is assigned to.
Require Surcharge Group *Required*	Determines if the Service Region requires a Surcharge Group to be assigned to the account/site when an account or site is created.
Default Surcharge Group	Drop down field to assign a default Surcharge Group if one applies.

GL Segment	Option to assign a GL Segment to track revenue from the specific service region in *Accounting > GL Transaction Processing.*
Map Area	Identifies the Map Region for servicing and locating to this Service Region.
Default Online Order Sales Rep	When utilizing online orders, a selection here will auto-assign a default sales representative.
Parent Service Region	Identifies the Parent Service Region if the Service Region being created is subordinate (child) to another.
Neighborhood	
Require Tax Group	If enabled, a Tax Group assignment is required for sites belonging to this Service Region.
Active	Controls if the Service Region is active and available to be assigned to a site. • 'Yes' = Active. • 'No' = Inactive.

Add a Service Region

1. Click the **+** at the top of the screen to open the Add Service Region tool.
2. Fill out all *Required Fields.*
   - Enter an **ID** for the Service Region.
   - Enter a **Name** for the Service Region.
   - Select the **Division** the Service Region is assigned.
   - Verify the **Active** status is set to "Yes" to enable it for use.
3. Complete additional fields based on your company's setup requirements.
4. Click **Save** when finished.