

# Service Region Setup

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**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. Use the Mapping feature to create a perimeter for a service region. When a new site is added with an address that falls within this perimeter, it will automatically be associated with the service region.

SERVICE REGION SETUP							
ID ↑	NAME	DIVISION	REQUIRE SURCHARGE GROUP	DEFAULT SURCHARGE GROUP	GL SEGMENT	DEFAULT BUNDLE ORDER SALES REP	PARENT SERVICE REGION
1001	WOODCREEK	DAYTON	Yes	Fuel Surcharge - Residential	SVCD1001	House Account - House Account (Sales)	
1002	PARKSIDE AT KW GLEN	DAYTON	No	Fuel Surcharge - Residential	SVCD1002	House Account - House Account (Sales)	
1003	ATASCA WOODS	DAYTON	No	Fuel Surcharge - Residential	SVCD1003	House Account - House Account (Sales)	
1004	ATASCOCITA NORTH	DAYTON	No	Fuel Surcharge - Residential	SVCD1004	House Account - House Account (Sales)	
1005	KINGS LAKE ESTATES	DAYTON	No	Fuel Surcharge - Residential	SVCD1005	House Account - House Account (Sales)	
1008	OAKS OF ATASCOCITA	DAYTON	No		SVCD1008	House Account - House Account (Sales)	
1009	STILLWATER HOA	DAYTON	No	Fuel Surcharge - Residential	SVCD1009	House Account - House Account (Sales)	
1010	KINGWOOD GREENS	DAYTON	No	Fuel Surcharge - Residential	SVCD1010	House Account - House Account (Sales)	
1011	LIBERTY COUNTRY CLUB	DAYTON	No		SVCD1011	House Account - House Account (Sales)	
1012	THE COMMONS	DAYTON	No	Fuel Surcharge - Residential	SVCD1012	House Account - House Account (Sales)	
1013	PINEY WOODS	DAYTON	No		SVCD1013	House Account - House Account (Sales)	
1014	ENCLAVE AT OLDE OAKS	DAYTON	No		SVCD1014	House Account - House Account (Sales)	
15		DAYTON	No			House Account - House Account (Sales)	
BUNN	Bunn NC	QAWASTE	Yes				
CORPUS	CORPUS OPEN MARKET	CORPUS	No	Fuel Surcharge - Commercial	SVCDCORPUS	House Account - House Account (Sales)	
DAYTON	DAYTON OPEN MARKET	DAYTON	No	Fuel Surcharge - Residential	SVCDDAYTON	House Account - House Account (Sales)	

## 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
<b>ID</b> <i>Required</i>	The 10 character ID number specific to the service region.
<b>Name</b> <i>Required</i>	Name of the Service Region.
<b>Division</b> <i>Required</i>	Identifies the Division a service region is assigned to. The map icon next to the division opens an interactive map, enabling you to draw a perimeter around the service region's geographic area. When creating a site, if the address is within the service region, it's automatically assigned; otherwise, users will need to manually select the appropriate service region.
<b>Require Surcharge Group</b> <i>Required</i>	Specifies whether a Surcharge Group must be assigned to the account or site upon creation.
<b>Default Surcharge Group</b>	Drop down field to assign a default surcharge group if one applies.
<b>GL Segment</b>	Option to assign a GL Segment to track revenue from the specific service region in <i>Accounting &gt; GL Transaction Processing</i> .

<b>Default Bundle Order Sales Rep</b>	When utilizing online orders, a selection here will auto-assign a default sales representative.
<b>Parent Service Region</b>	Identifies the Parent Service Region if the Service Region being created is subordinate (child) to another.
<b>Neighborhood</b>	
<b>Require Tax Group</b>	If enabled, a Tax Group assignment is required for sites belonging to this Service Region.
<b>Allow Portal Self Registration</b>	
<b>Active</b>	Controls if the Service Region is active and available to be assigned to a site. <ul style="list-style-type: none"> <li>'Yes' = Active.</li> <li>'No' = Inactive.</li> </ul>

## Add a Service Region

Review the setup process outlined here for adding a service region. Only the required fields highlighted in red are necessary to establish a service region; however, additional fields may be completed to meet your company's specific requirements.

The screenshot displays the 'SERVICE REGION SETUP' interface. At the top, there is a '+ DIVISION ALL' dropdown. Below is a table with columns: ID ↑, NAME, DIVISION, REQUIRE SURCHARGE GROUP, and DEFAULT SURCHARGE GROUP. The table lists various regions like WOODCREEK, DAYTON, etc. A modal window titled 'ADD SERVICE REGION' is open, showing a form with the following fields:

- SERVICE REGION ID (highlighted in red)
- NAME (highlighted in red)
- DIVISION (highlighted in red)
- REQUIRE SURCHARGE GROUP (highlighted in red)
- DEFAULT SURCHARGE GROUP
- GL SEGMENT
- DEFAULT BUNDLE ORDER SALES REP
- PARENT SERVICE REGION
- NEIGHBORHOOD
- REQUIRE TAX REGION (set to No)
- ALLOW PORTAL SELF REGISTRATION (set to No)
- ACTIVE (set to Yes)

A 'SAVE' button is located at the bottom of the modal. A red arrow points from the '+' icon in the table header to the modal window.

1. Click the green '+' at the top of the screen to open the Add Service Region popup.
2. Fill out all *Required Fields*.
  - o Enter an **ID** for the service region.
  - o Enter a **Name** for the service region.
  - o Select the **Division** the service region is assigned.
  - o Choose whether a **surcharge group** is required when creating a site within the service region.
3. Verify the **Active** status is set to "Yes" to enable it for use.
4. Complete additional fields based on your company's setup requirements.
5. Click **Save** when finished.

## Map a Service Region

Click the map icon for a division to open an interactive map, and use the available tools to draw a perimeter around a specific service region within the division. By default, sites are displayed but can be hidden by selecting 'Hide Sites.' Once a perimeter is set, any new site added within this area will automatically be assigned to the service region.

ID ↑	NAME	DIVISION	REQUIRE SURCHARGE GROUP	DEFAULT SURCHARGE GROUP	GL SEGMENT	DEFAULT BUNDLE ORDER SALES REP	P	S
1001	WOODCREEK	DAYTON	Yes	Fuel Surcharge - Residential	SVCD1001	House Account - House Account (Sales)		
1002	PARKSIDE AT KW GLEN	DAYTON	No	Fuel Surcharge - Residential	SVCD1002	House Account - House Account (Sales)		
1003	ATASCA WOODS	DAYTON	No	Fuel Surcharge - Residential	SVCD1003	House Account - House Account (Sales)		
1004	ATASCOCITA NORTH	DAYTON						
1005	KINGS LAKE ESTATES	DAYTON						
HOUSTON	HOUSTON OPEN MAR...	HOUSTON						
LA	LOS ANGELES	HOUSTON						
OC	Orange County	QAWASTE						
PRLD_MUNI	PEARLAND MUNICIPAL	HOUSTON						
QASVCREG	QA Service Region 2	QAWASTE						
QAWASTE	QA Waste OPEN MARK...	QAWASTE						
SANDIEGO	SD	QAWASTE						
BUNN	Bunn NC	QAWASTE						
CORPUS	CORPUS OPEN MARKET	CORPUS						

**MAP AREA - SERVICE REGION: QA WASTE OPEN MARKET**

ZOOM TO SITES   ZOOM TO MAP AREA   HIDE SITES   REMOVE SELECTED SHAPE

Map

Legend: Prospect (purple), Active (green)

IMPORT   SAVE