

Service Region Setup

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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
ID <i>Required</i>	The 10 character ID number specific to the service region.
Name <i>Required</i>	Name of the Service Region.
Division <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.
Require Surcharge Group <i>Required</i>	Specifies whether a Surcharge Group must be assigned to the account or site upon creation.
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 <i>Accounting > GL Transaction Processing</i> .

Default Bundle 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.
Allow Portal Self Registration	
Active	Controls if the Service Region is active and available to be assigned to a site. <ul style="list-style-type: none"> 'Yes' = Active. 'No' = Inactive.

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, BUNN, CORPUS, DAYTON, DeleteMe, DELT, HOUSTON, LA, OC, PRLD_MUNI, and OASVCREG. A modal window titled 'ADD SERVICE REGION' is open, showing fields for SERVICE REGION ID, NAME, DIVISION, REQUIRE SURCHARGE GROUP, DEFAULT SURCHARGE GROUP, GL SEGMENT, DEFAULT BUNDLE ORDER SALES REP, PARENT SERVICE REGION, NEIGHBORHOOD, REQUIRE TAX REGION, ALLOW PORTAL SELF REGISTRATION, and ACTIVE. A 'SAVE' button is at the bottom of the modal. A red arrow points to the '+' icon in the table header.

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