

# 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.

The screenshot displays the 'SERVICE REGION SETUP' interface. At the top, there is a search bar and a 'DIVISION' dropdown menu set to 'ALL'. Below this is a table with columns: ID, NAME, DIVISION, REQUIRE SURCHARGE GROUP, DEFAULT SURCHARGE GROUP, GL SEGMENT, MAP AREA, DEFAULT ONLINE ORDER SALESREP, PARENT SERVICE REGION, NEIGHBORHOOD, REQUIRE TAX REGION, ERP LABEL, ALLOW PORTAL SELF REGISTRATION, and ACTIVE. The table lists various service regions, with row 1006 highlighted in red. An 'ADD SERVICE REGION' modal form is overlaid on the table, containing fields for ID, NAME, DIVISION (dropdown), REQUIRE SURCHARGE GROUP (dropdown), DEFAULT SURCHARGE GROUP (dropdown), GL SEGMENT, MAP AREA (dropdown), DEFAULT ONLINE ORDER SALESREP (dropdown), PARENT SERVICE REGION (dropdown), NEIGHBORHOOD, REQUIRE TAX REGION (dropdown), ERP LABEL (dropdown), ALLOW PORTAL SELF REGISTRATION (dropdown), and ACTIVE (dropdown). A 'SAVE' button is at the bottom of the modal.

## 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 for this 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.
<b>Require Surcharge Group</b> <i>Required</i>	Determines if the Service Region requires a Surcharge Group to be assigned to the account/site when an account or site is created.
<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>Map Area</b>	Identifies the Map Region for servicing and locating to this Service Region.
<b>Default Online 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>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

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.
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