

Line Of Business

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Pathway: [Setup > Services > Line Of Business](#)

Line of Business is the categorization of related services within a company's operations. It represents distinct divisions or segments of the company's operations that are dedicated to specific areas of waste management (Roll-off, Residential, Commercial, Medical and etc.). This screen displays in two grids: upper grid and lower grid.

Permissions

The following permissions are required to view, add and edit in the Line of Business Setup screen:

Permission ID	Permission Name
120	Setup \ System and Security

Upper Grid

The upper grid shows all active and inactive lines of business. Double-click on a line of business to access the "Edit Line of Business" editor screen. To add a new line of business, click the green add icon located in the upper left corner.

LINE OF BUSINESS SETUP														SETUP > SERVICES > LINE OF BUSINESS	
ID	NAME	SCREEN TYPE	ENABLE MANIFEST PROCESSING	ENABLE FINALIZED MANIFEST	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	ACKNOWLEDGE... TEXT	ACTIVE	
DOCDEST	Document Dest...	1	No	No					No	5	Today ...			Yes	
FEL	Commercial	1	No	No	D100			Unearned R...	No	5	Yesterd...			Yes	
LF	Landfill	1	No	No	80			Account Pay...	No	5	Yesterd...			Yes	
MEDICAL	Medical Waste	1	Yes	Yes		Minimum ...	Over Weig...		No	5	Today ...			Yes	
MISC	Miscellaneous	1	No	No	D200			Unearned R...	No	5	Yesterd...			Yes	
RESI	Residential	1	No	No	D200			Unearned R...	No	5	Yesterd...			Yes	
RO	Roll Off	1	No	No	D300			Unearned R...	No	5	Yesterd...			Yes	
SCALE	Scale	1	No	No					No	5	Today ...			Yes	

Add a Line of Business

The following section provides information on the tabs that are displayed when adding a line of business.

Tab: Settings

The Settings tab displays in both the Add and Edit Line of Business popup editors.

Field Descriptions

Fields	Descriptions
LOB ID	The identification for the Line Of Business.
Name	The name of the Line Of Business.
Active	The active status of the Line Of Business.
Screen Type	Select option 1 (this is currently the only option).
GL Segment	Assign a GL Segment to this LOB.
Unearned Revenue GL Account	Assigned GL Account for all unearned revenue in the Line of Business.
Work Order Minimum Charge Code	<p>Charge Code that is applied to the work order if the work order minimum has not been met.</p> <p>Example: In the example below, the service charged for is \$15 less than the minimum required amount. In this scenario, a charge code would be added to the work order for the difference and the account would be billed \$50 (\$35 + \$15).</p> <p>Work order minimum = \$50</p> <p><u>Service total = \$35</u></p> <p>Difference = \$15</p>
Over Max Weight Charge Code	<p>The charge code applied by the Line of Business if equipment max weight is exceeded.</p> <p>Max Weight is entered in Equipment Type Setup (<i>Setup > Services > Equipment Type</i>).</p>

Rental Charge Code	The charge code applied for daily equipment inactivity (equipment rental fee).
Limit Charge Code To Matching Equipment	Limits the charge code list of options available on the work order to only display charge codes that match the equipment of the Line of Business.
Limit Charge Code To Matching Material	Limits the charge code list of options available on the work order to only display charge codes of matching material.
Invoice Summary Description	Text entered here displays on the invoice summary.
Productivity Unit Name	
Enable Used Oil Collection	Enables settings for used oil collection within the driver application.
Enable Proactive Route Status Driver Check	
Enable Manifest Processing	
Enable Manifest Group Weight Rounding	Enables rounding when grouping the weight of the boxes for medical waste.
Enable Active Dispatch	Controls if the Line of Business displays on the Active Dispatch screen.
Enable Charge Codes Waste Codes	Enables recording and attaching EPA Waste Codes to a charge code.
Enable Work Type Default Charge Codes	For each Line of Business default charge codes apply, this option should be set to 'Yes'.
Enable BIC Reporting	Enables BIC reporting where BIC reporting is required.
Enable Labor Tracking	Displays the Labor tab on the Service Record. By default, this field is disabled.

Tab: Mobile

The Mobile tab controls settings in the driver application for the select Line of Business.

The screenshot displays the 'LINE OF BUSINESS SETUP' application. A modal window titled 'UPDATE LINE OF BUSINESS' is open, showing configuration options for a specific Line of Business (LOB) identified as 'HAZ' (Hazardous Material). The 'Mobile' tab is selected, and the 'ENABLE COMPLETION NOTE ENTRY' checkbox is visible. The background shows a list of LOBs with columns for ID, NAME, SCREEN TYPE, ENABLE MANIFEST, GL SEGMENT, TEMPORARY SERVICE CL, WORK ORDER MINIMUM, OVER MAX-WEIGHT, UNEARNED REVENUE CL, ENABLE USED OIL, AUTO COMPLETE, DAYS AVAILABLE, RECEIPT HEADER TEXT, ACKNOWLEDGEMENT ROUTE, CUTOFF TIME, and ACTIVE.

Field Descriptions

Fields	Descriptions
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Name	The name of the Line of Business.
Active	The status of the Line of Business.
Days Available To Driver	Establishes what days a driver can see on their mobile app.
Receipt Header Text	Text entered here will display at the top of a receipt.
Auto Complete Seconds	Auto completes a job after the amount of time indicated here has passed. Setting only applies to the Residential mode on the driver app and is calculated in seconds. <i>Example: if stops should only take 1 minute to complete, enter 60 in the Auto Complete Seconds field. Upon arriving at the location, the stop will be marked 'Complete' after 60 seconds has passed.</i>
Acknowledgement Text	Text entered here displays in the signature section of the receipt.
Service Description Display	A selection here affects how the service description is displayed to drivers in NavuNav (Android).
Enable Completion Note Entry	Allows drivers to add a completion note after finishing a service for the line of business.

Tab: Optimization

The Optimization tab includes settings that are used for Route Optimization. Route Optimization requires additional setup. Watch an overview of Route Optimization here: [Route Optimization Overview](#)

The screenshot displays the 'LINE OF BUSINESS SETUP' screen. A red arrow points to a green '+' icon in the top left corner. Below this is a table with columns: ID, NAME, SCREEN TYPE, ENABLE MANIFEST PROCESSING, GL SEGMENT, WORK ORDER MINIMUM CHARGE CODE, and OVER MAX-WEIGHT CHARGE CODE. A list of destinations (DOCDEST) is shown on the left: FEL, HAZ, LF, MEDICAL, MISC, RESI, RO, and SCALE. An 'ADD LINE OF BUSINESS' modal is open, featuring a 'Settings' tab (highlighted with a red box) and sub-tabs for 'Mobile', 'Optimization', 'Self-Service Ordering', and 'Profitability'. The 'Optimization' sub-tab is active and contains the following fields:

- ROUTE OPTIMIZATION TYPE: Standard
- ROUTE OPTIMIZATION OVERRIDES: [Empty field]
- HEALTH OVERRIDES: [Empty field]
- Health Score Weights:
 - BALANCING: 34
 - COMPACTNESS: 33
 - INTERLACING: 33

A 'SAVE' button is located at the bottom of the modal.

Field Descriptions

Field	Description
Optimization	
Route Optimization Type	<ul style="list-style-type: none"> Standard - optimization is processed through the Dispatch screen. Roll Off - optimization is processed through Active Dispatch, dependent on license setup. Geared towards active dispatching.
Route Optimization Overrides	<p>Overrides the default settings configured at Route Smart and indicates how the route will be serviced (right/left side of street, etc.)</p> <p>Leave blank and route optimization will use your Route Smart's unique account settings.</p>
Health Overrides	
Health Score Weights	
Balancing	
Compactness	
Interlacing	

Tab: Self-Service Ordering

Settings in the Self-Service Ordering tab apply to the Customer Portal application.

The screenshot displays the 'LINE OF BUSINESS SETUP' interface. A table lists various line of business types (DOCDEST, FEL, HAZ, LF, MEDICAL, MISC, RESI, RO, SCALE). A red arrow points to a '+' icon in the top left corner. A modal window titled 'ADD LINE OF BUSINESS' is open, showing fields for LOB ID, NAME, and ACTIVE (Yes/No). Below these fields are tabs for Settings, Mobile, Optimization, Self-Service Ordering (highlighted with a red box), and Profitability. The 'Self-Service Ordering' tab is active, showing 'ONLINE ORDER DEFAULT STATUS' set to 'Pending Approval'. There are also sections for 'SUMMARY' and 'CONTENT' with 'SUMMARY IMAGE' and 'CONTENT IMAGE' fields, each with a 'SELECT IMAGE...' button and a 'BROWSE...' button. A 'SAVE' button is at the bottom of the modal.

Tab: Profitability

The Profitability tab determines the specific calculation method the system should use for route profitability calculations.

Field Descriptions

Field	Description
Route Calculation	Select the preferred calculation method to calculate route profitability.
Work Order Calculation	Select the preferred calculation method to calculate work order profitability.

Lower Grid

Values in the lower grid display when a line of business is selected from the upper grid.

LINE OF BUSINESS SETUP SETUP > SERVICES > LINE OF BUSINESS

ID	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	ACTIVE
DOCDEST	Document Destru...	1	No					No	5	Today Only			Yes
FEL	Commercial	1	No	D100			Unearned Rev...	Yes	5	Yesterda...			Yes
HAZ	Hazardous Material	1	No					No	5	Last, Cur...			Yes
INACTIVE	INACTIVE LOB	1	No					No	5	Today Only			No
LF	Landfill	1	No	80			Account Paya...	No	5	Yesterda...			Yes
MEDICAL	Medical Waste	1	No		Minimum Se...	Over Weigh...		No	5	Yesterda...	Receipt hea...	This is LOB a...	Yes
MISC	Miscellaneous	1	No	1234567...			Unearned Rev...	No	5	Yesterda...			Yes
RESI	Residential	1	No	D200			Unearned Rev...	No	5	Yesterda...			Yes
RO	Roll Off	1	No	D300	Minimum Se...		Unearned Rev...	No	5	Last, Cur...			Yes
SCALE	Scale	1	No					No	5	Today Only			Yes
UO	Used Oil Collection	1	Yes					Yes	5	Today Only			Yes

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Service Frequencies NavuNav Available Extra Charges Division Specific

FREQUENCY TYPE ACTIVE FREQUENCIES ONLY

TYPE	FREQUENCY	DESCRIPTION	SHORT DESCRIPTION	
Times per week	6	6x per week	6xW	<input checked="" type="checkbox"/>
On Call	0	On Call	OC	<input checked="" type="checkbox"/>
Times per week	1	1x per week	1xW	<input checked="" type="checkbox"/>
Times per week	2	2x per week	2xW	<input checked="" type="checkbox"/>
Times per week	3	3x per week	3xW	<input checked="" type="checkbox"/>
Times per week	4	4x per week	4xW	<input checked="" type="checkbox"/>
Times per week	5	5x per week	5xW	<input checked="" type="checkbox"/>
Times per week	7	7x per week	7xW	<input checked="" type="checkbox"/>
Every x weeks	2	Every 2 weeks	E2W	<input checked="" type="checkbox"/>
Every x weeks	4	Every 4 weeks	E4W	<input checked="" type="checkbox"/>
Every x months	1	Monthly	E1M	<input checked="" type="checkbox"/>
Every x weeks	6	Every 6 weeks	E6W	<input type="checkbox"/>
Every x weeks	8	Every 8 weeks	E8W	<input type="checkbox"/>

Tab: Service Frequencies

The Service Frequencies tab determines which frequencies appear in the Frequency dropdown field when adding an active service to a site. To view and assign frequencies, select the line of business from the upper grid. Frequencies can be assigned using the associated toggle switches.

Service Frequencies NavuNav Available Extra Charges Division Specific

FREQUENCY TYPE ACTIVE FREQUENCIES ONLY

TYPE	FREQUENCY	DESCRIPTION	SHORT DESCRIPTION	
Times per week	6	6x per week	6xW	<input checked="" type="checkbox"/>
On Call	0	On Call	OC	<input checked="" type="checkbox"/>
Times per week	1	1x per week	1xW	<input checked="" type="checkbox"/>
Times per week	2	2x per week	2xW	<input checked="" type="checkbox"/>
Times per week	3	3x per week	3xW	<input checked="" type="checkbox"/>
Times per week	4	4x per week	4xW	<input checked="" type="checkbox"/>
Times per week	5	5x per week	5xW	<input checked="" type="checkbox"/>
Times per week	7	7x per week	7xW	<input checked="" type="checkbox"/>
Every x weeks	2	Every 2 weeks	E2W	<input checked="" type="checkbox"/>
Every x weeks	4	Every 4 weeks	E4W	<input checked="" type="checkbox"/>
Every x months	1	Monthly	E1M	<input checked="" type="checkbox"/>
Every x weeks	6	Every 6 weeks	E6W	<input type="checkbox"/>
Every x weeks	8	Every 8 weeks	E8W	<input type="checkbox"/>
Every x weeks	10	Every 10 weeks	E10W	<input type="checkbox"/>
Every x weeks	12	Every 12 weeks	E12W	<input type="checkbox"/>

Tab: NavuNav Available Extra Charges

The NavuNav Available Extra Charges tab manages the available charge codes within the driver application, enabling

drivers to add them to a work order. To view and assign extra charges, select the line of business from the upper grid. Extra charges can then be assigned using the associated toggle switches.

Service Frequencies	NavuNav Available Extra Charges	Division Specific
CHARGE CODE	NAME	SEQUENCE
FLSWAP	Front Load Swap	<input checked="" type="checkbox"/>
FLREPAIRPT	Front Load Repair Parts	<input checked="" type="checkbox"/>
FLREM	Front Load Removal	<input checked="" type="checkbox"/>
FLRELOCATE	Front Load Relocate	<input checked="" type="checkbox"/>
FLINSTALL	Front Load Installation Fee	<input checked="" type="checkbox"/>
FL08XP	Front Load 08YD Extra Pickup	<input checked="" type="checkbox"/>
FL06XP	Front Load 06YD Extra Pickup	<input checked="" type="checkbox"/>
FL04XP	Front Load 04YD Extra Pickup	<input checked="" type="checkbox"/>
FL02XP	Front Load 02YD Extra Pickup	<input checked="" type="checkbox"/>
FLDEL	Front Load Delivery	<input checked="" type="checkbox"/>
FLREPAIR	Front Load Repair	<input checked="" type="checkbox"/>
FLBULK	Bulk Pickup	<input checked="" type="checkbox"/>
FLOVRLOAD	Front Load Overload Charge	<input type="checkbox"/>

Tab: Division Specific

Limit the line of business to specific divisions by using the toggle switches to enable those divisions for access to the line of business.

Service Frequencies	NavuNav Available Extra Charges	Division Specific			
DIVISION	ERP LABEL	SELF-SERVICE ENABLED	CUTOFF TIME	DAYS AHEAD	SELF-SERVICE APPROVAL REQUIRED
CORPUS		Yes	2:00 PM	1	Yes <input checked="" type="checkbox"/>
DAYTON		No		0	No <input type="checkbox"/>
QAWASTE		No		0	No <input type="checkbox"/>
HOUSTON		No		0	No <input type="checkbox"/>
HILLSBORO		No		0	No <input type="checkbox"/>