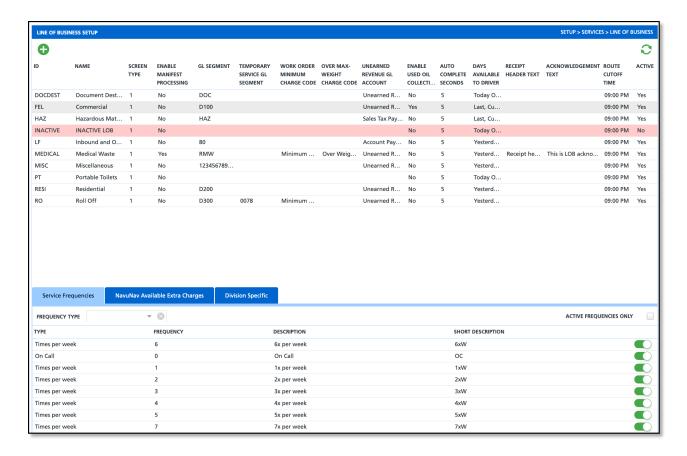
#### **Line Of Business**

Last Modified on 11/06/2025 11:57 am PST

#### 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. The upper grid shows all active and inactive lines of business. Values in the lower grid display when a line of business is selected from the upper grid.



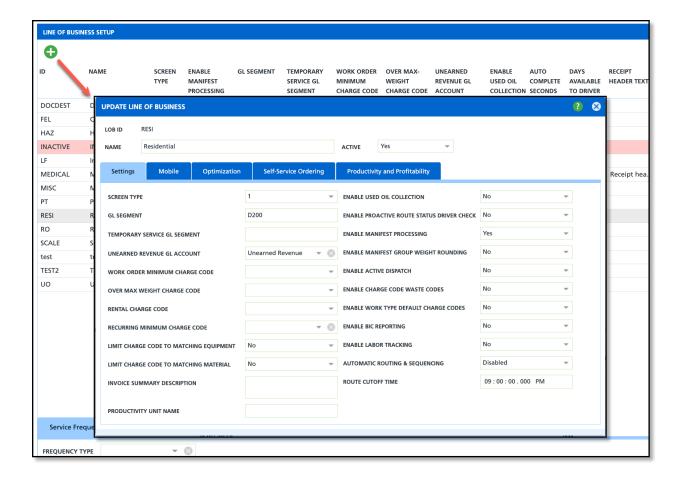
#### **Permissions**

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 - Add or Update a Line of Business**

The following section provides information on the tabs that are displayed when adding a line of business. To **edit** a line of business, double-click the row corresponding to the line you want to modify.



## **Tab: Settings**

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

#### **Field Descriptions**

| Fields                         | Descriptions  |
|--------------------------------|---|
| LOBID                          | 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                     | Enter the GL Segment number to identify and track revenue streaming from a specific line of business. More information about GL Segmentation Setup and Tracking can be found here: GL Segmentation Setup and GL Transaction Processing. |
| Unearned Revenue GL<br>Account | Specifies the GL Account where all unearned revenue for the line of business will be tracked.   |

|  | Charge Code that is applied to the work order if the work order minimum has not been met.  Example: In the example below, the service charged for is \$15 less than the  |
|--|--|
| Work Order Minimum<br>Charge Code        | 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). Review Charge Code Setup for more information on creating a |
|  | work order minimum charge code.  Work order minimum = \$50   |
|  | Service total = \$35   |
|  | Difference = \$15  |
|  | The charge code applied by the Line of Business if equipment max weight is   |
| Over Max Weight Charge                   | exceeded.  |
| Code                                     | Max Weight is entered in Equipment Type Setup (Setup > Services >  |
|  | Equipment Type). Review Charge Code Setup for more information on creating an over max weight charge code.   |
|  | The charge code applied for daily equipment inactivity (equipment rental   |
| Rental Charge Code                       | fee). Review Inactivity and Daily Rental Fee Setup for more information  |
|  | about daily rental charge setup process and Applying to a Service.   |
| Limit Charge Code To                     | Limits the charge code list of options available on a work order to only   |
| Matching Equipment                       | display charge codes that match the equipment of the Line of Business.   |
| Limit Charge Code To                     | Limits the charge code list of options available on a work order to only   |
| Matching Material                        | display charge codes of matching material.   |
| Invoice Summary<br>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<br>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<br>Codes       | Enables recording and attaching EPA Waste Codes to a charge code.  |
| Enable Work Type Default<br>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.  |

Setting the supports the automation of routing and sequencing new stops in Route Management. Options include:

- **Disabled:** Select this option to disable automatic routing. When new services are added, they must be manually assigned to a route from the Pending tab in Route Management.
- Assign Suggested Route Only: If enabled, this option automatically assigns the suggested route, normally chosen manually from the Pending tab, to the stop. When enabled, assigned stops will have a sequence of "0" on their route and will appear in the Unsequenced Stops column within the Renumber / Sequence Stops tab of Route Management.
- Assign Suggested Route and Sequence: If enabled, this option utilizes
  RouteSmart, a licensed third-party system, to automatically assign the
  suggested route and sequence stops in the most optimized order. A
  RouteSmart license is required to enable this feature. For more
  information, refer to the Route Optimization documentation.

NavuNav setting that affects the **Scheduled Date** field on a service record based on when the driver marks the stop Complete.

**Logic:** If a driver completes a stop after the **Route Cutoff Time**, the Scheduled Date is set to Completion Date Time plus one day.

**Example:** if the original Scheduled Date was **7/13/25**, and the Route Cutoff Time was set to **10:00 PM**, and service was completed at **11:00 PM on 7/13/25**—which was after the route's cutoff time—the Scheduled Date will be updated to **7/14/25**, with the Originally Scheduled Time noted.

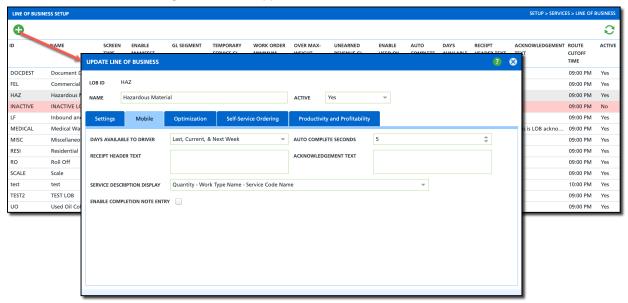
**Route Cutoff Time** 

Automatic Routing &

Sequencing

#### **Tab: Mobile**

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

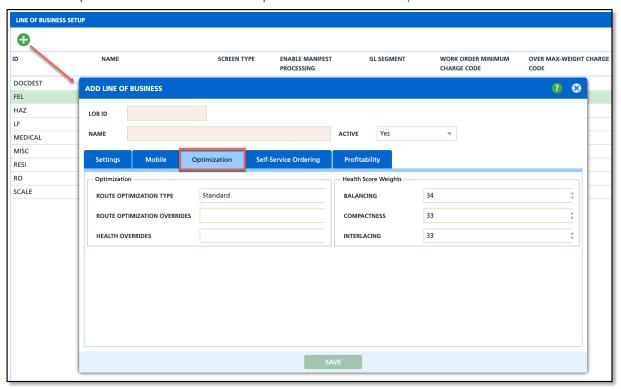


### **Field Descriptions**

| Fields                          | Descriptions  |
|---------------------------------|---|
| Name                            | The name of the Line of Business.   |
| Active                          | The status of the Line of Business.   |
| Days Available To<br>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           | Automatically completes a job once the specified time has elapsed. This setting applies only to Residential mode in the driver app and is measured in seconds. For example, if stops should take only 1 minute to complete, enter "60" in the Auto Complete Seconds field. Once the driver arrives at the location, the stop will automatically be marked as "Complete" after 60 seconds. |
| Acknowledgement Text            | Text entered here displays in the signature section of the receipt.   |
| Service Description<br>Display  | A selection here affects how the service description is displayed to drivers in NavuNav (Android).  |
| Enable Completion Note<br>Entry | Allows drivers to add a completion note after finishing a service for the line of business.   |

# **Tab: Optimization**

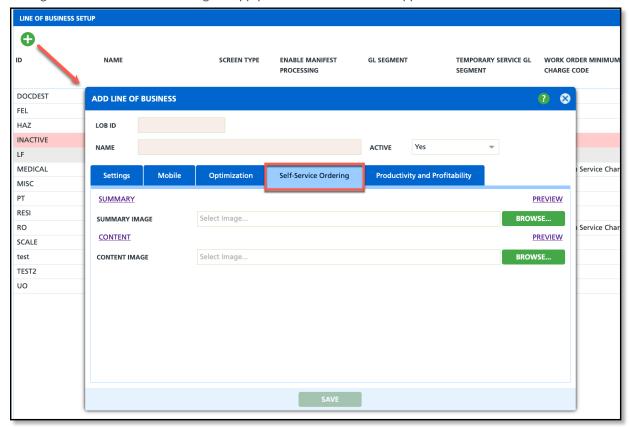
The Optimization tab includes settings that are used for Route Optimization. Route Optimization requires additional setup. Watch an overview of Route Optimization here: Route Optimization Overview



| Field                           | Description   |  |
|---------------------------------|---|--|
| Optimization                    |   |  |
| Route Optimization<br>Type      | <ul> <li>Standard - optimization is processed through the Dispatch screen.</li> <li>Roll Off - optimization is processed through Active Dispatch, dependent on license setup. This option is intended for active dispatch.</li> </ul> |  |
| Route Optimization<br>Overrides | Overrides the default settings configured at Route Smart and indicates how the route will be serviced (right/left side of street, etc.). Leave blank and route optimization will use your Route Smart's unique account settings.      |  |
| Health Overrides                |   |  |
| Health Score Weights            |   |  |
| Balancing                       |   |  |
| Compactness                     |   |  |
| Interlacing                     |   |  |

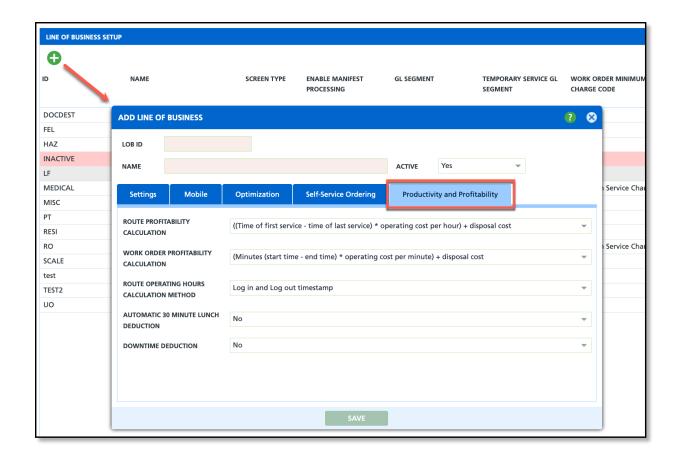
# **Tab: Self-Service Ordering**

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



# **Tab: Productivity and Profitability**

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

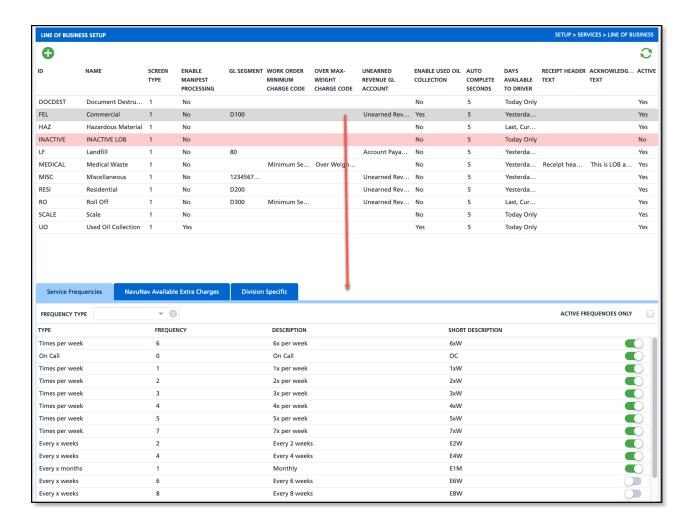


#### **Field Descriptions**

| Field                                      | Description  |
|--|--|
| Route Profitability  Calculation           | Select the preferred calculation method to calculate route profitability.                            |
| Work Order<br>Profitability<br>Calculation | Select the preferred calculation method to calculate work order profitability.                       |
| Route Operating Hours Calculation Method   | Setting the system will use to identify the route's operating hours.                                 |
| Automatic 30 Minute<br>Lunch Deduction     | Setting to have the system automatically apply a 30 minute lunch deduction from the operating hours. |
| Downtime Deduction                         | Setting that will deduct downtime from route operating hours.  |

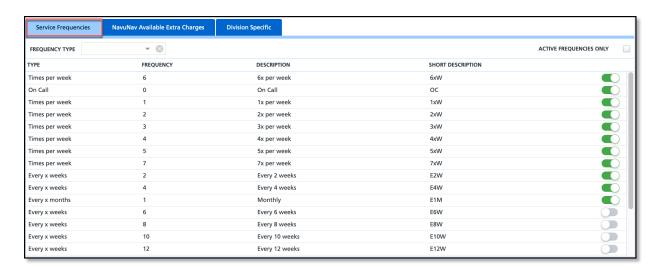
## **Lower Grid**

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



## **Tab: Service Frequencies**

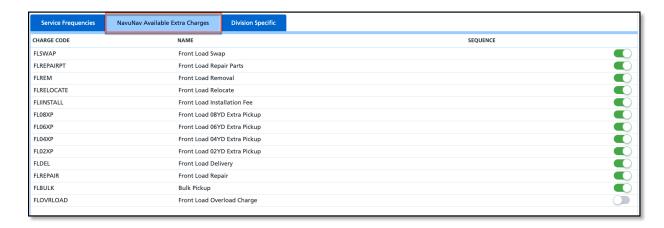
The Service Frequencies tab determines which frequencies will display in the Frequency dropdown field when adding an active service to a site. To view and assign frequencies, select the line of business from the upper grid. Frequencies can be assigned using the associated toggle switches.



## 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.



# **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.

