Line Of Business

Last Modified on 08/21/2024 8:37 am EDT

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.

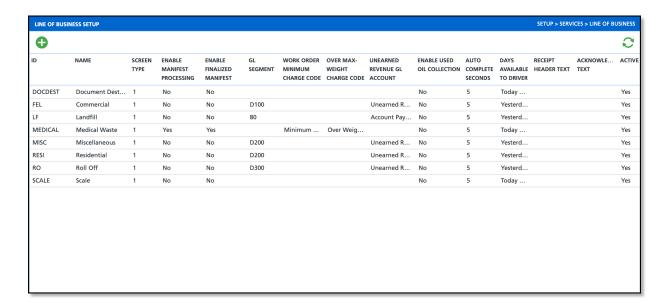
Permissions

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

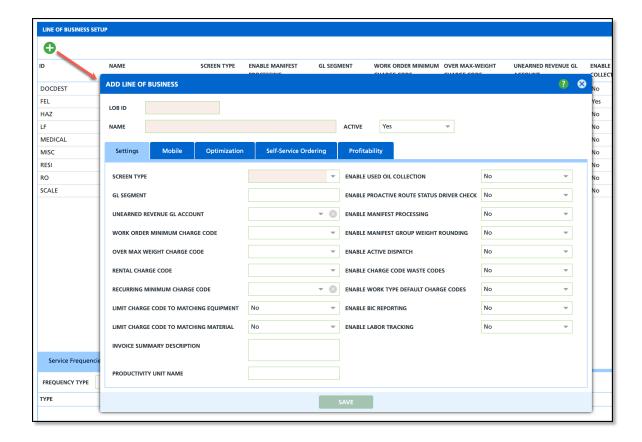
Upper Grid

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.



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.

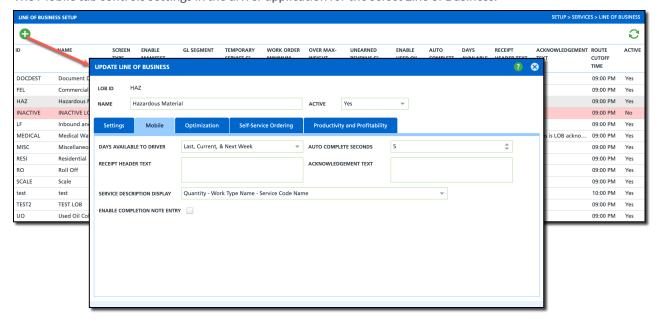
Field Descriptions

Fields	Descriptions	
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	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	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 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). Work order minimum = \$50 Service total = \$35 Difference = \$15	
Over Max Weight Charge Code	The charge code applied by the Line of Business if equipment max weight is exceeded. Max Weight is entered in Equipment Type Setup (Setup > Services > Equipment Type).	

The charge code applied for daily equipment inactivity (equipment rental fee).
The charge code applied for daily equipment macrifity (equipment rental fee).
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.
Limits the charge code list of options available on the work order to only display charge codes of matching material.
Text entered here displays on the invoice summary.
Enables settings for used oil collection within the driver application.
Enables rounding when grouping the weight of the boxes for medical waste.
Controls if the Line of Business displays on the Active Dispatch screen.
Enables recording and attaching EPA Waste Codes to a charge code.
For each Line of Business default charge codes apply, this option should be set to 'Yes'.
Enables BIC reporting where BIC reporting is required.
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.



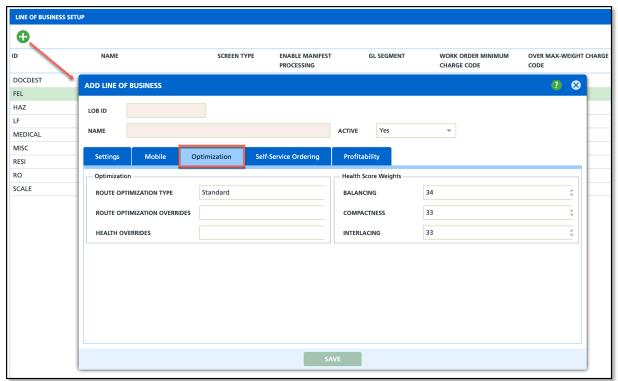
Field Descriptions

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. 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.
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

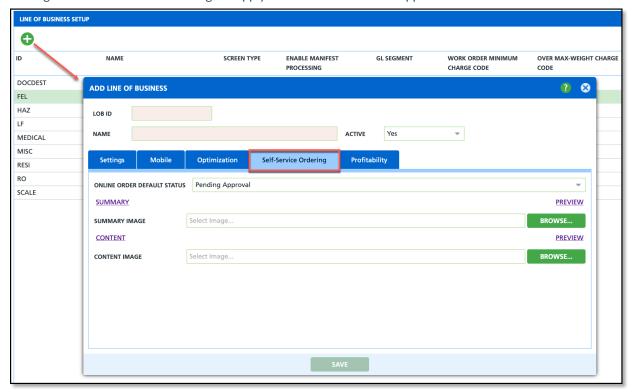


Field Descriptions

Field	Description
Optimization	
Route Optimization Type	 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	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	

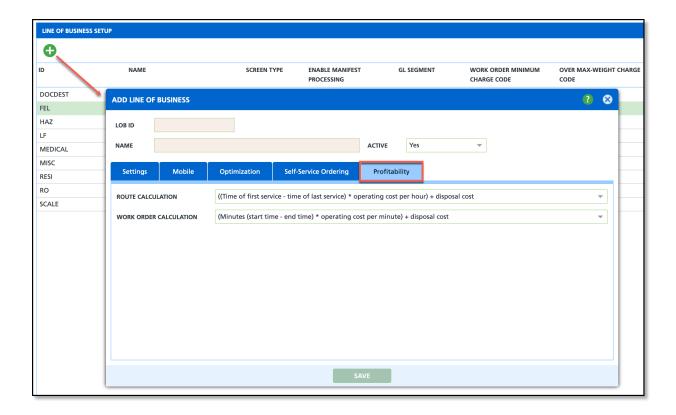
Tab: Self-Service Ordering

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



Tab: Profitability

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

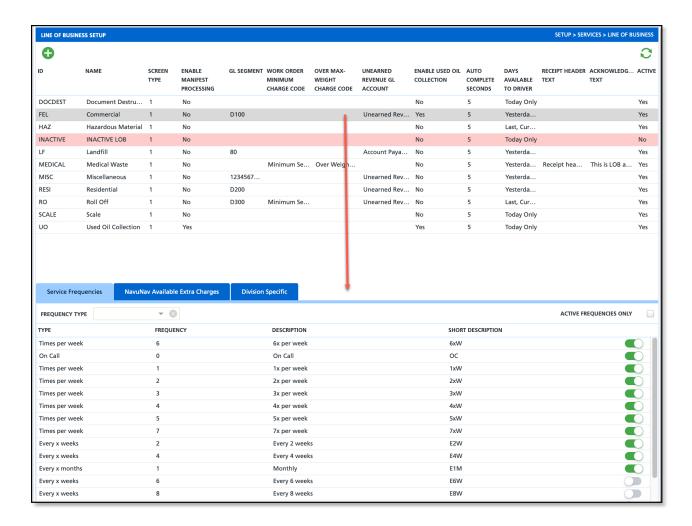


Field Descriptions

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.

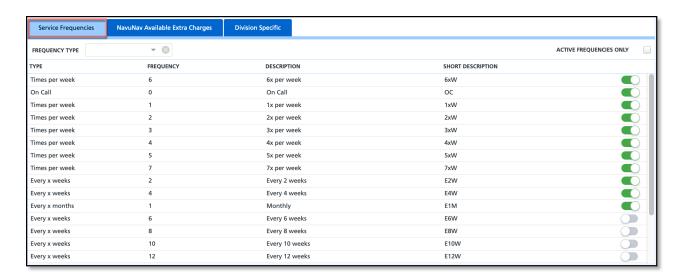
Lower Grid

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



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.



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.

