

Line Of Business

Last Modified on 11/18/2024 11:19 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.

LINE OF BUSINESS SETUP
SETUP > SERVICES > LINE OF BUSINESS

ID	NAME	SCREEN TYPE	ENABLE MANIFEST PROCESSING	GL SEGMENT	TEMPORARY SERVICE GL SEGMENT	WORK ORDER MINIMUM CHARGE CODE	OVER MAX-WEIGHT CHARGE CODE	UNEARNED REVENUE GL ACCOUNT	ENABLE USED OIL COLLECTI...	AUTO COMPLETE SECONDS	DAYS AVAILABLE TO DRIVER	RECEIPT HEADER TEXT	ACKNOWLEDGEMENT TEXT	ROUTE CUTOFF TIME	ACTIVE
DOCDEST	Document Dest...	1	No	DOC				Unearned R...	No	5	Today O...			09:00 PM	Yes
FEL	Commercial	1	No	D100				Unearned R...	Yes	5	Last, Cu...			09:00 PM	Yes
HAZ	Hazardous Mat...	1	No	HAZ				Sales Tax Pay...	No	5	Last, Cu...			09:00 PM	Yes
INACTIVE	INACTIVE LOB	1	No						No	5	Today O...			09:00 PM	No
LF	Inbound and O...	1	No	80				Account Pay...	No	5	Yesterd...			09:00 PM	Yes
MEDICAL	Medical Waste	1	Yes	RMW		Minimum ...	Over Weig...	Unearned R...	No	5	Yesterd...	Receipt he...	This is LOB ackno...	09:00 PM	Yes
MISC	Miscellaneous	1	No	123456789...				Unearned R...	No	5	Yesterd...			09:00 PM	Yes
PT	Portable Toilets	1	No						No	5	Today O...			09:00 PM	Yes
RESI	Residential	1	No	D200				Unearned R...	No	5	Yesterd...			09:00 PM	Yes
RO	Roll Off	1	No	D300	0078	Minimum ...		Unearned R...	No	5	Yesterd...			09:00 PM	Yes

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"/>

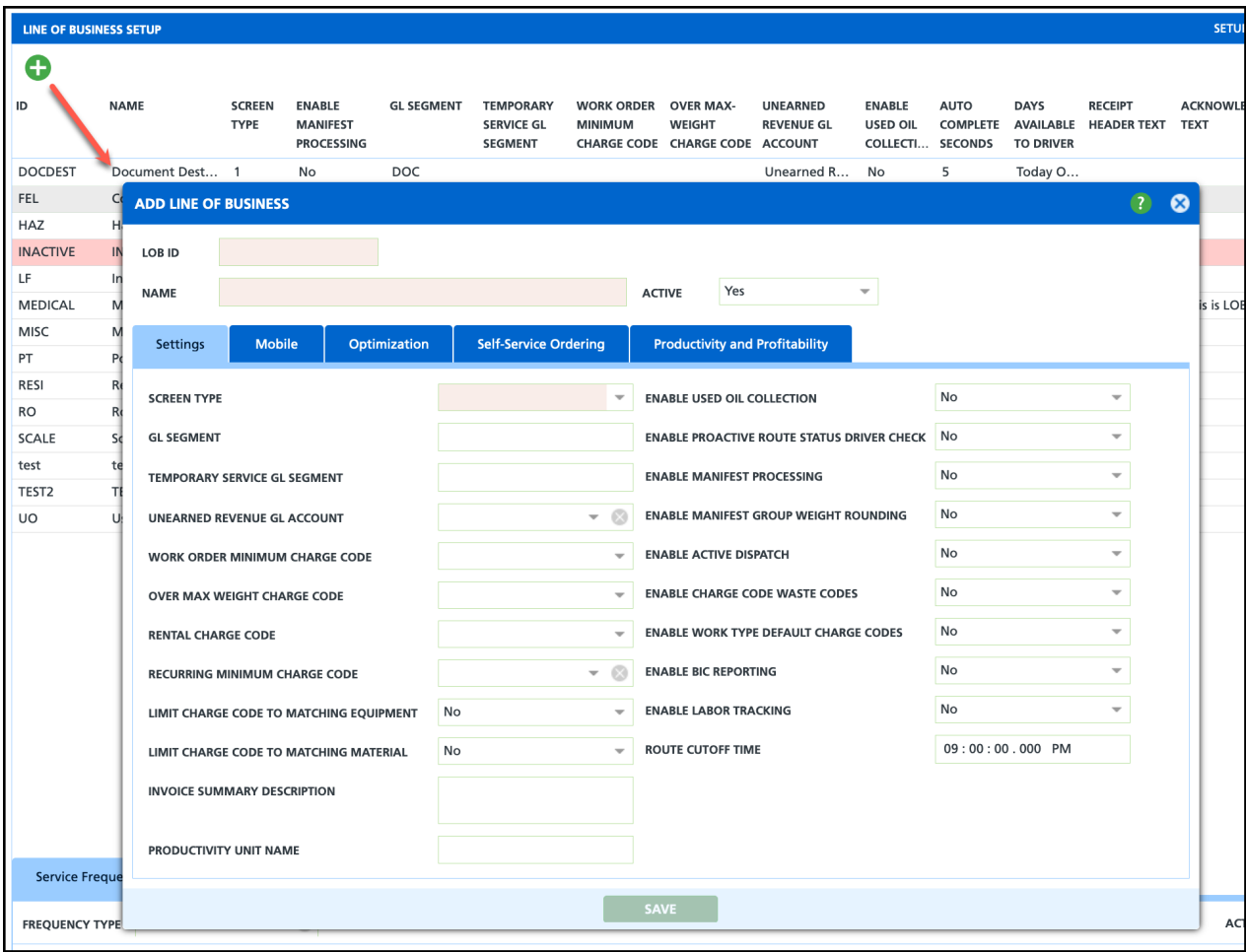
Permissions

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 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.

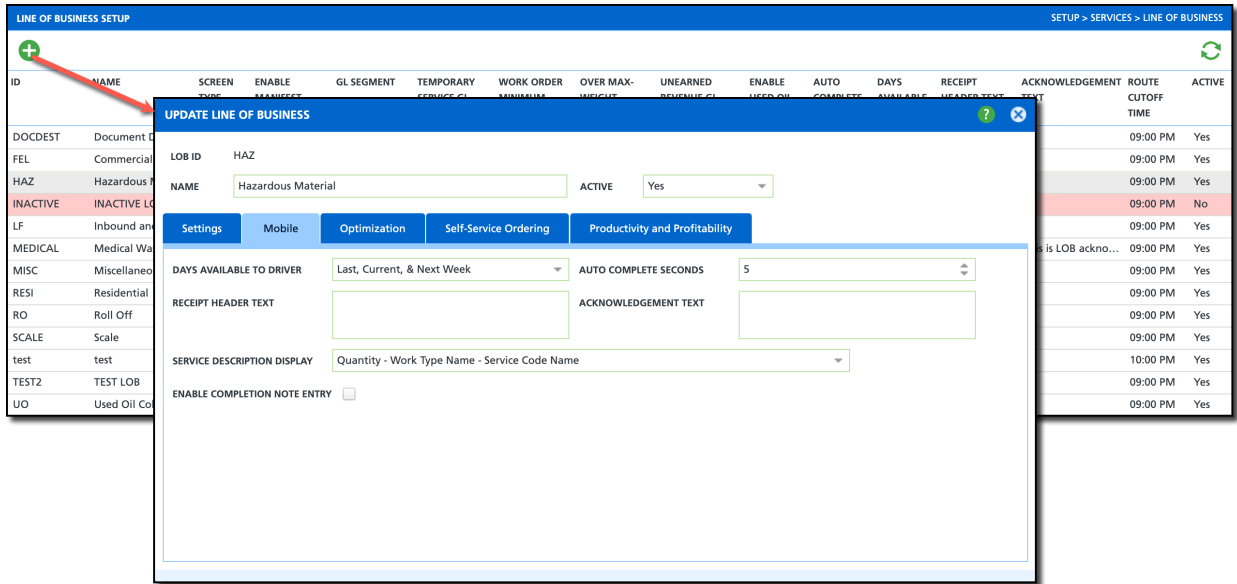
Field Descriptions

Fields	Descriptions
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	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 Account	Specifies the GL Account where all unearned revenue for the line of business will be tracked.

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). Review Charge Code Setup for more information on creating a work order minimum charge code.</p> <p>Work order minimum = \$50 <u>Service total = \$35</u> 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>). Review Charge Code Setup for more information on creating an over max weight charge code.</p>
Rental Charge Code	<p>The charge code applied for daily equipment inactivity (equipment rental fee). Review Inactivity and Daily Rental Fee Setup for more information about daily rental charge setup process and Applying to a Service.</p>
Limit Charge Code To Matching Equipment	Limits the charge code list of options available on a 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 a 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.
Route Cutoff Time	Unavailable at this time.

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 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 <i>Auto Complete Seconds</i> 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 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 shows the 'LINE OF BUSINESS SETUP' interface. A modal window titled 'ADD LINE OF BUSINESS' is open, allowing users to configure a new line of business. The modal includes fields for 'LOB ID', 'NAME', and 'ACTIVE' (set to 'Yes'). Below these are five tabs: 'Settings', 'Mobile', 'Optimization', 'Self-Service Ordering', and 'Profitability'. The 'Optimization' tab is highlighted with a red box. Under the 'Optimization' tab, there are three sections: 'Optimization' with fields for 'ROUTE OPTIMIZATION TYPE' (set to 'Standard'), 'ROUTE OPTIMIZATION OVERRIDES', and 'HEALTH OVERRIDES'; and 'Health Score Weights' with fields for 'BALANCING' (34), 'COMPACTNESS' (33), and 'INTERLACING' (33). A 'SAVE' button is located at the bottom of the modal. A red arrow points to a green plus icon in the top left corner of the main interface.

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. This option is intended for active dispatch.
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.

LINE OF BUSINESS SETUP

+

ID	NAME	SCREEN TYPE	ENABLE MANIFEST PROCESSING	GL SEGMENT	TEMPORARY SERVICE GL SEGMENT	WORK ORDER MINIMUM CHARGE CODE
DOCDEST						
FEL						
HAZ						
INACTIVE						
LF						
MEDICAL						
MISC						
PT						
RESI						
RO						
SCALE						
test						
TEST2						
UO						

ADD LINE OF BUSINESS

LOB ID:

NAME: ACTIVE: Yes

Settings | Mobile | Optimization | **Self-Service Ordering** | Productivity and Profitability

SUMMARY [PREVIEW](#)

SUMMARY IMAGE:

CONTENT [PREVIEW](#)

CONTENT IMAGE:

Tab: Productivity and Profitability

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

LINE OF BUSINESS SETUP

+

ID	NAME	SCREEN TYPE	ENABLE MANIFEST PROCESSING	GL SEGMENT	TEMPORARY SERVICE GL SEGMENT	WORK ORDER MINIMUM CHARGE CODE
DOCDEST						
FEL						
HAZ						
INACTIVE						
LF						
MEDICAL						
MISC						
PT						
RESI						
RO						
SCALE						
test						
TEST2						
UO						

ADD LINE OF BUSINESS

LOB ID:

NAME: ACTIVE: Yes

Settings | Mobile | Optimization | Self-Service Ordering | **Productivity and Profitability**

ROUTE PROFITABILITY CALCULATION:

WORK ORDER PROFITABILITY CALCULATION:

ROUTE OPERATING HOURS CALCULATION METHOD:

AUTOMATIC 30 MINUTE LUNCH DEDUCTION:

DOWNTIME DEDUCTION:

Field Descriptions

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

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

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 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.

Service Frequencies		NavuNav Available Extra Charges		Division Specific	
FREQUENCY TYPE				ACTIVE FREQUENCIES ONLY <input type="checkbox"/>	
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"/>			
FLOBXP	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"/>