

# Work Type Setup

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The **Work Type Setup** screen is used to define and manage service transaction types by line of business. Examples include missed pickup, dump and return, removal, and relocate. During scheduling, the user selects the appropriate work type, which is then recorded in the Order Type field on the service record. Work types are configured per line of business and are also utilized for NavuNav driver app functionality, inventory tracking, and inbound/outbound scale processing.

WORK TYPE SETUP													SETUP > OPERATIONS > WORK TYPE	
ID	NAME	LOB	ACTION CATEGORY	INVENTORY MOVE TYPE	MANIFEST NOTIFICATION TEMPLATE	ORDER BASELINE SECONDS	DEFAULT SECONDS PER UNIT	CREATE ONE SERVICE RECORD PER QUANTITY	ENABLE DISPOSAL ENTRY	ENABLE DRIVER ENTERED LABEL WEIGHTS	ENABLE DRIVER PHOTO PROMPT	PRODUCTIVITY UNITS	ENABLE DRIVER TO SET IN PROGRESS	
FL_Other	FL Other	Commercial		None			0	No	No	No	No	1	No	
FL_DELIVER	FL Delivery	Commercial	Delivery	Delivery			0	No	Yes	No	No	1	No	
FL_EXCHANGE	FL Exchange	Commercial	Swap	Exchange			0	No	No	No	No	1	No	
FL_EXTRAPU	FL Extra Pick Up	Commercial	Pick Up	None			0	No	Yes	No	No	1	No	
FL_MISSED	FL Missed Pick Up	Commercial		None			0	No	No	No	No	1	No	
FL_MOVE	FL Move	Commercial		None			0	No	No	No	No	1	No	
FL_RELOCAT	FL Relocate	Commercial		None			0	No	No	No	No	1	No	
FL_REMOVE	FL Removal	Commercial	Removal	Removal			0	No	No	No	No	1	No	
FL_REPAIR	FL Repair	Commercial	Repair	None			0	No	No	No	No	1	No	
FL_SERVICE	FL Service	Commercial		None	Service Repor...		600	No	No	No	No	1	No	
new1	new1	Commercial		None			0	No	No	No	No	1	No	
TEST	TEST	Commercial		None			0	No	No	No	No	1	No	

  

NOTIFICATION	TYPE	SCHEDULE	NOTIFICATION TEMPLATE

## Permissions

The following permissions are required to use the Work Type Setup screen:

Permission ID	Permission Name
24	Setup \ Operations

## Add/Update Work Type Field Descriptions

Field	Description
<b>Details Tab</b>	
<b>ID</b> <i>Required</i>	The work type ID that will display on the work order.
<b>Name</b> <i>Required</i>	The name of the work type.
<b>Self-Service Label</b>	Allows users to customize a label for site service actions in the Waste Connector application. If a label is not entered (field is empty/null) the name of the work type is used.

<b>Line Of Business</b> <i>Required</i>	The Line Of Business the work type belongs to.
<b>Inventory Move Type</b>	Indicates the type of move performed by the work type and controls how inventory is updated in Site Inventory.
<b>Action Category</b>	Categorizes the action that is performed by the work type and controls the display of additional fields.
<b>Manifest Notification Template</b>	Option to assign a notification template to the work type.
<b>Create One Service Record Per Quantity</b>	Select preference if each service requires its own record or if the services can be grouped together when multiple service orders were made to complete the service
<b>Enable Disposal Entry</b>	Enable if entry type for disposal information is needed on the work order for this item within the work type.
<b>Enable Consolidation Batch Link</b>	Enable a link to the Manifest Consolidation Batch. <ul style="list-style-type: none"> <li>• Yes - Enable link</li> <li>• No - Disable Link</li> </ul>
<b>Productivity Units</b>	Weighted metric assigned to a work type for productivity calculations.
<b>Destruction Date Tracking</b>	Determines how the system should record the destruction date for Manifest Consolidation. When enabled, a Destruction Date field displays on the work order in the Completion Data tab. <ul style="list-style-type: none"> <li>• Disabled - no date is recorded.</li> <li>• Destruction Date Entry Required - Requires the user to enter a Destruction Date to post the work order.</li> <li>• WO Completion Date - Uses the completion date from the work order for the destruction date.</li> <li>• Tracking and Destruction Date Entry Required - Requires the user to enter a Transfer Receipt Date and a Destruction Date to post the work order.</li> </ul>
<b>Inbound / Outbound</b> The following fields display when the <b>Action Category</b> for the work type is either <b>Inbound / Receiving</b> or <b>Outbound / Shipping</b> .	
<b>Post Work Order When Completed</b>	Setting option to post an inbound or outbound work order after the Work Status has been marked 'Completed.'
<b>Enable Weight Adjustment</b>	Controls the ability to adjust Gross / In and Tare / Out weights on the scale ticket.
<b>Track Inbound Source / Origin</b>	Controls whether the <b>Origins</b> tab or the <b>Source Location</b> tab displays on inbound service records. If one of the "Require" options is selected, the inbound order cannot be completed until the source or origin requirement is met. Select <b>No</b> to hide these tabs.  The following options are available: <ul style="list-style-type: none"> <li>• No</li> <li>• Require Source Location</li> <li>• Require Material Origin</li> <li>• Optional Material Origin</li> </ul>

<b>Load Material Composition</b>	<p>Controls the display of the Materials tab on inbound service records.</p> <ul style="list-style-type: none"> <li>• Disabled <ul style="list-style-type: none"> <li>◦ Hides the Materials tab.</li> </ul> </li> <li>• Enable Multiple Materials <ul style="list-style-type: none"> <li>◦ Displays the <i>Material</i> tab, allowing you to record multiple materials along with their <i>Quantity</i> and <i>Percentage</i>.</li> </ul> </li> <li>• Enable Multiple Profiles and Materials <ul style="list-style-type: none"> <li>◦ Displays the <i>Material</i> tab, enabling you to record multiple profiles and materials within the record.</li> </ul> </li> </ul>
<b>Route Optimization Settings</b>	
<b>Order Baseline Seconds</b>	<p>Enter the average amount of time (in seconds) to service the location for a specific work type. This helps Route Optimization plan route efficiency.</p>
<b>Default Seconds Per Unit</b>	<p>Enter the average amount of time (in seconds) it takes to service one unit of the work type. For route optimization, the value entered here is multiplied against the scheduled service quantity on the work order to more accurately calculate service duration.</p>
<b>NavuNav Settings Tab</b>	
<b>Enable Driver Photo Prompt</b>	Option to prompt drivers to include a photo.
<b>Enable Driver Entered Label Weight</b>	Enables driver ability to enter the weight of the boxes from the driver application.
<b>Enable Driver To Set In Progress</b>	Enables the option for drivers to update a stop's Work Status to 'In Progress'. This helps determine the start and completion time frame.
<b>Return to Route List On Completion of WO</b>	If enabled, the driver will be returned to the route list after completing the work order in the Stop Details screen.
<b>Add/Remove Default Charge Codes Tab</b>	
<p>This tab is only available on the Update Work Type screen. For new work types, complete the initial setup and save the record, then reopen the work type to access the tab.</p>	
<b>Name</b>	Displays the name of the default charge code that can be applied to a work type.
<b>Toggle Button</b>	Controls the adding and removing of the charge code.

## Setup: Add Work Type

1. Select the **green +** icon.
2. Complete the following required fields:
  - Enter the **ID** for the work type.
  - Enter a **Name** for the work type.

- o Select the **Line Of Business** the work type belongs to.
- 3. Select the appropriate Action Category. This setting is essential for inbound/outbound and transfer work orders, and is also used to filter Unassigned Work in Active Dispatch.
  - o If **Inbound / Receiving** or **Outbound / Shipping** is selected, additional Inbound / Outbound setup fields are displayed.
- 4. Complete additional fields based on your company's setup requirements.
- 5. Click **Save** when finished.
- 6. To add **Default Charge Codes**, save and reopen the work type to display the tab.

## Work Type Setup: Alerts

The Alerts tab allows users to review and manage alerts associated with different work types. The Alerts tab displays upon selection of a work type. Notification Types displayed here are managed in *Setup > System > Notification Template*. Use the toggle button associated with an alert to add it to a work type.

WORK TYPE SETUP
SETUP > OPERATIONS > WORK TYPE

+ LINE OF BUSINESS: All

ID	NAME	LOB	ACTION CATEGORY	INVENTORY MOVE TYPE	MANIFEST NOTIFICATION TEMPLATE	ORDER BASELINE SECONDS	DEFAULT SECONDS PER UNIT	CREATE ONE SERVICE RECORD PER QUANTITY	ENABLE DISPOSAL OR MATERIAL ENTRY	ENABLE DRIVER ENTERED LABEL WEIGHTS	ENABLE DRIVER PHOTO PROMPT	PRODUCTIVITY UNITS	ENABLE DRIVER TO SET IN PROGRESS
DDVC	Document Destruction Service	Document Destruction	Swap	None			0	No	None	No	Yes	1	No
DEL_HAZ	Deliver HAZ	Hazardous Material	Delivery	None			0	No	None	No	No	1	No
DUMPONLY	Dump Only	Roll Off		None			0	Yes	Disposal En...	No	No	1	No
FL_DELIVER	FL Delivery	Commercial	Delivery	Delivery			0	No	Disposal En...	No	No	1	No
FL_EXCHANGE	FL Exchange	Commercial	Swap	Exchange			0	No	None	No	No	1	No
FL_EXTRAPU	FL Extra Pick Up	Commercial	Pick Up				0	No	None	No	No	1	No
FL_MISSED	FL Missed Pick Up	Commercial		None			0	No	None	No	No	1	No
FL_MOVE	FL Move	Commercial		None			0	No	None	No	No	1	No
FL_RELOCAT	FL Relocate	Commercial		None			0	No	None	No	No	1	No
FL_REMOVE	FL Removal	Commercial	Removal	Removal			0	No	None	No	No	1	No
FL_REPAIR	FL Repair	Commercial	Repair	None			0	No	None	No	No	1	No

Alerts
Surcharges

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**NOTIFICATION TYPE**

- Order Creation (Send Immediately)
- Service Completion (Send immediately upon status update)
- Service Completion (Send at 7pm)
- Service Completion (Send immediately upon order posting)
- Service Completion Summary (Send end of the day)
- Service Cancelled Notification (Send immediately upon status update)
- Service Rescheduled Notification (Send immediately upon schedule change)
- Not Serviced Notification (Send immediately upon status update)
- Service reminder for every x weeks services (Send 3 Calendar days prior to scheduled service at 7am)
- Service reminder for every x weeks services (Send 2 Calendar days prior to scheduled service at 7am)
- Service reminder for every x weeks services (Send 1 Calendar day prior to scheduled service at 7am)
- Service reminder for every x weeks services (Send 3 business days prior to scheduled service at 7am)
- Service reminder for every x weeks services (Send 2 business days prior to scheduled service at 7am)
- Service reminder for every x weeks services (Send 1 business day prior to scheduled service at 7am)
- Service reminder for every x weeks services (Send 1 business day prior to scheduled service at 7PM)

**NOTIFICATION TEMPLATE**

- New On Call Order-Delivery
- How did we do?
- Service Notification-Completed - WO #@workorder.number;;
- Service Notification-Cancelled - WO #@workorder.number;;
- Service Notification-Rescheduled - WO #@workorder.number;;
- Service Reminder-Calendar - WO #@workorder.number;;
- Service Reminder-Calendar - WO #@workorder.number;;
- Service Reminder-Calendar - WO #@workorder.number;;
- Service Reminder-Business - WO #@workorder.number;;
- Service Reminder-Business - WO #@workorder.number;;
- Service Reminder-Business - WO #@workorder.number;;
- Service Reminder-Business - WO #@workorder.number;;

## Work Type Setup: Surcharges

The Surcharges tab allows users to review and manage surcharges associated with different work types. The Surcharges tab displays upon selection of a work type from the upper grid. Use the toggle button associated with a surcharge to add it to a work type.

ID	NAME	LOB	ACTION CATEGORY	INVENTORY MOVE TYPE	MANIFEST NOTIFICATION TEMPLATE	ORDER BASELINE SECONDS	DEFAULT SECONDS PER UNIT	CREATE ONE SERVICE RECORD PER QUANTITY	ENABLE DISPOSAL OR MATERIAL ENTRY	ENABLE DRIVER ENTERED LABEL WEIGHTS	ENABLE DRIVER PHOTO PROMPT	PRODUCTIVITY UNITS	ENABLE DRIVER TO SET IN PROGRESS
DDSV	Document Destruction Service	Document Destru...	Swap	None			0	No	None	No	Yes	1	No
DEL_HAZ	Deliver HAZ	Hazardous Material	Delivery	None			0	No	None	No	No	1	No
DUMPONLY	Dump Only	Roll Off		None			0	Yes	Disposal En...	No	No	1	No
FL_DELIVER	FL Delivery	Commercial	Delivery	Delivery			0	No	Disposal En...	No	No	1	No
FL_EXCHNGE	FL Exchange	Commercial	Swap	Exchange			0	No	None	No	No	1	No
FL_EXTRAPU	FL Extra Pick Up	Commercial	Pick Up	None			0	No	None	No	No	1	No
FL_MISSED	FL Missed Pick Up	Commercial		None			0	No	None	No	No	1	No
FL_MOVE	FL Move	Commercial		None			0	No	None	No	No	1	No
FL_RELOCAT	FL Relocate	Commercial		None			0	No	None	No	No	1	No

Alerts **Surcharges**

SURCHARGE ID	SURCHARGE	
1004	Dayton Franchise Fee	<input checked="" type="checkbox"/>
1005	Liberty Franchise Fee	<input type="checkbox"/>
1007	CCMSW Fee - Yardage	<input type="checkbox"/>
1008	Pearland Franchise Fee	<input type="checkbox"/>
1009	Fuel Surcharge-Commercial	<input type="checkbox"/>
1010	Fuel Surcharge-Residential	<input type="checkbox"/>
1011	Fuel Surcharge-Roll Off	<input type="checkbox"/>
1012	Fuel Surcharge 10%	<input type="checkbox"/>
1013	Fuel Surcharge 15%	<input type="checkbox"/>
1014	Fuel Surcharge 9%	<input checked="" type="checkbox"/>
1015	Fuel Surcharge-Rate Index	<input type="checkbox"/>
1016	Environmental Surcharge	<input type="checkbox"/>