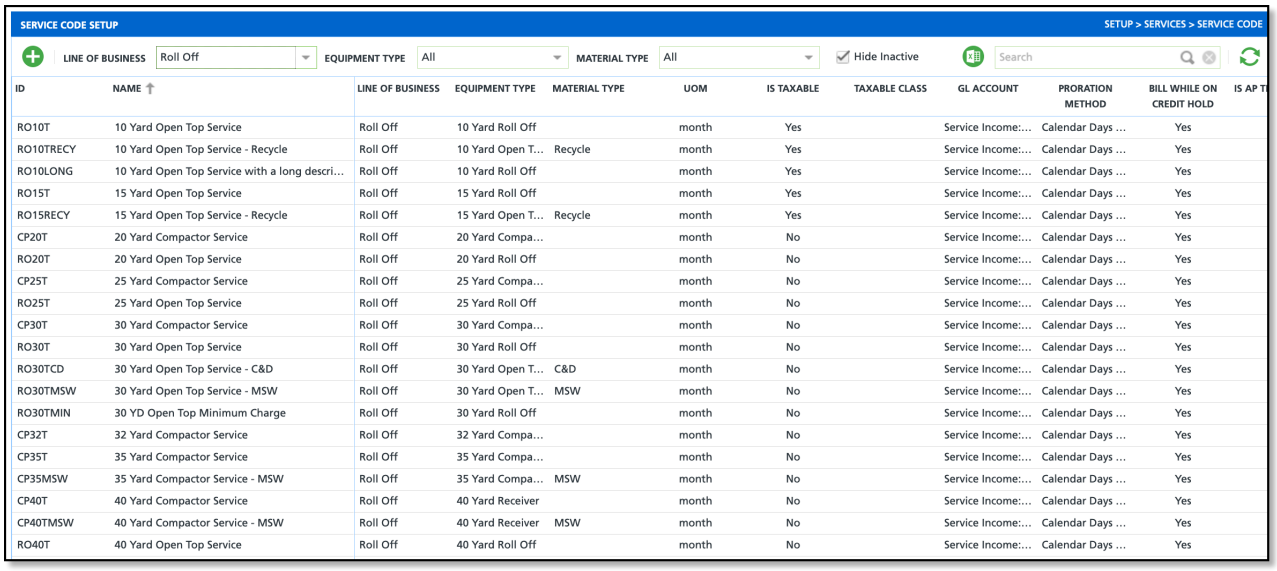
Service Code Setup

Last Modified on 10/06/2026 7:11 am PDT

Pathway: *Setup > Services > Service Code*

Service Codes identify the types of services offered under a Line of Business and populate for selection in the Service Code drop down field when adding a service to a site or a proposal. Setup here affects many areas related to servicing and billing a site.

After creating a service code, navigate to the **Available Service Code Setup** screen to define its availability within the division's service regions. A service code won't be applicable until its availability is set.



ID	NAME	LINE OF BUSINESS	EQUIPMENT TYPE	MATERIAL TYPE	UOM	IS TAXABLE	TAXABLE CLASS	GL ACCOUNT	PRORATION METHOD	BILL WHILE ON CREDIT HOLD	IS AP T
RO10T	10 Yard Open Top Service	Roll Off	10 Yard Roll Off		month	Yes		Service Income:...	Calendar Days ...	Yes	
RO10TRECY	10 Yard Open Top Service - Recycle	Roll Off	10 Yard Open T...	Recycle	month	Yes		Service Income:...	Calendar Days ...	Yes	
RO10LONG	10 Yard Open Top Service with a long descri...	Roll Off	10 Yard Roll Off		month	Yes		Service Income:...	Calendar Days ...	Yes	
RO15T	15 Yard Open Top Service	Roll Off	15 Yard Roll Off		month	Yes		Service Income:...	Calendar Days ...	Yes	
RO15RECY	15 Yard Open Top Service - Recycle	Roll Off	15 Yard Open T...	Recycle	month	Yes		Service Income:...	Calendar Days ...	Yes	
CP20T	20 Yard Compactor Service	Roll Off	20 Yard Compa...		month	No		Service Income:...	Calendar Days ...	Yes	
RO20T	20 Yard Open Top Service	Roll Off	20 Yard Roll Off		month	No		Service Income:...	Calendar Days ...	Yes	
CP25T	25 Yard Compactor Service	Roll Off	25 Yard Compa...		month	No		Service Income:...	Calendar Days ...	Yes	
RO25T	25 Yard Open Top Service	Roll Off	25 Yard Roll Off		month	No		Service Income:...	Calendar Days ...	Yes	
CP30T	30 Yard Compactor Service	Roll Off	30 Yard Compa...		month	No		Service Income:...	Calendar Days ...	Yes	
RO30T	30 Yard Open Top Service	Roll Off	30 Yard Roll Off		month	No		Service Income:...	Calendar Days ...	Yes	
RO30TCD	30 Yard Open Top Service - C&D	Roll Off	30 Yard Open T...	C&D	month	No		Service Income:...	Calendar Days ...	Yes	
RO30TMSW	30 Yard Open Top Service - MSW	Roll Off	30 Yard Open T...	MSW	month	No		Service Income:...	Calendar Days ...	Yes	
RO30TMIN	30 YD Open Top Minimum Charge	Roll Off	30 Yard Roll Off		month	No		Service Income:...	Calendar Days ...	Yes	
CP32T	32 Yard Compactor Service	Roll Off	32 Yard Compa...		month	No		Service Income:...	Calendar Days ...	Yes	
CP35T	35 Yard Compactor Service	Roll Off	35 Yard Compa...		month	No		Service Income:...	Calendar Days ...	Yes	
CP35MSW	35 Yard Compactor Service - MSW	Roll Off	35 Yard Compa...	MSW	month	No		Service Income:...	Calendar Days ...	Yes	
CP40T	40 Yard Compactor Service	Roll Off	40 Yard Receiver		month	No		Service Income:...	Calendar Days ...	Yes	
CP40TMSW	40 Yard Compactor Service - MSW	Roll Off	40 Yard Receiver	MSW	month	No		Service Income:...	Calendar Days ...	Yes	
RO40T	40 Yard Open Top Service	Roll Off	40 Yard Roll Off		month	No		Service Income:...	Calendar Days ...	Yes	

Permissions

The following permission(s) are required to add and edit service codes:

Permission ID	Permission Name
118	Setup \ Services

Add a Service Code

Service codes can be added in two ways: individually or by using the clone feature. Adding a service code individually allows you to create it from scratch, while the clone option streamlines the process when you're building a new code that closely resembles an existing one. Cloning creates an identical copy that you can quickly adjust, making setup faster and more consistent.

Service Code Field Descriptions

Field	Description

Service Code *Required*	The unique ID for the Service Code.
Name *Required*	The Name of the service code that displays in customer service and on an invoice.
Line Of Business *Required*	Limits the service code to only be offered to accounts belonging to the selected Line of Business.
Equipment Type	Identifies the equipment used to perform the service. Selection options are dependent on the selected Line of Business.
Material Type	Identifies the type of material collected by the service code.
UOM *Required*	The unit of measure indicates how the service is intended to be billed. Additionally the Bill Group's frequency can restrict or prevent the selection of certain UOM service codes based on the billing frequency of the bill group assigned to the account.
Est Monthly Volume UOM	If estimation is Enabled, this is the Unit Of Measurement that will be used to measure the estimated monthly volume for this service.
Taxable	Indicates if the service code is taxable.
GL Account	Specifies the GL Account used to track revenue streams associated with the service code.
Proration Method	Select the proration method used for the service code.
Bill While On Hold	Option to avoid or continue billing for the service code when an account's status is Credit Hold or Vacation Hold. If "No" is selected, once the account is removed from credit hold (and the service is still active), the system will prorate to catch the account up in the next billing cycle. ** Site Credit Hold status does not apply. *Related Documentation:* Credit Holds, Vacation Holds, and Billing
Bill Zero Amount	Option to bill the service at a zero amount.
Do Not Bill Until Delivery Completed	Option to not bill the site until after the delivery work order has been marked completed. This requires also enabling equipment ownership, then applies this billing option to 'Company' owned equipment.
Is AP Transaction	Select whether this Service Code is intended to be invoiced as an AP transaction. Service codes setup as an AP Transaction will generate an AP invoice separately from Non-AP Transaction Invoices.
Is Shell	Identifies the service code as a placeholder (or "shell") service code that does not yet have full details and can be assigned, configured, or customized later. These are commonly used during implementation phases when data is still being migrated and mapped.
Pricing Model	Identifies the pricing model the service will use. The options are: • None • Target Pricing (Weight Class) • Round Trip Distance • Work Order Volume Tiered
Calculate Rate Per Yard	Enable this option when the Service Code must calculate rates on a per–cubic yard basis.

Work Type Event Class	Required setup for routing and scheduling this service that will determine the Work Types available or used for this Service Code.
Active	Controls if the service code is available for use.
Translate	Allows you to enter a translated name for the service code in another language. The translated service code name will display automatically based on the user's **Locale** setting *(User Account > Locale)*.
Enable Routing	Enables the service for routing. Services that do not require routing such as a monthly lock charge, should not be enabled.
Require Frequency	Impacts two areas: 1. Requires the user to select a frequency when creating a service. If frequency is not required, servicing *is offered as an 'on call' basis.* 2. When adding a default rate to a service code in Available Service Code Setup and this field is set to **No**, the frequency field does not display on the **Add Service Code Default Rate** popup.
Enable Parent Service Linking	Allows for linking site services. This field displays only when the *Enable Routing* and *Require Frequency* service code settings are set to 'No.' If service linking will be used, enable this field for the child service that will be linked to a parent service.
Enable Driver Update	Allows a user to require a signature entry for the driver for manifested waste. *Additional setup is required.*
Enable Account Signature	Option to capture the customer's signature after servicing the location. *Additional setup is required.*
Enable Driver Signature	If enabled, prompts the driver to sign the for service the upon completion.
Enable Recurring Minimum *Conditional*	Only displays if the **Recurring Minimum Charge Code** field for the line of business is populated, otherwise this field does not display. **Important:* *Due to its dependence on the established line of business for the service code, this field will be visible only after saving a new service code or when editing an existing one.*
Enable Work Order Minimum	Allows a user to define a minimum amount that must be charged on a work order. *Additional setup is required.*
Enable Rental Fee	Allows a user to define a daily inactivity rental fee on the equipment provided by the service.
Enable Default Destination	Displays the Default Destination field when adding a service. After a user makes a selection, it will auto-populate on a work order.
Enable Negative Amount	Allows a user to set a negative amount for the rate for the service.
Enable Estimates Tracking	Enables tracking of service revenue on a monthly, project, or per–work order basis within the service contract or proposal. When set to **Yes**, the following fields appear on the Add Service screen for contracts and proposals: **Estimated, Revenue, Units,** and **UOM**.
Enable Equipment Ownership	Allows the user to specify equipment ownership. When set to **Yes**, an **Equipment Ownership** drop down field becomes available on the **Add/Edit Active Service** screen.
Enable Share	Allows a user to set this Service Code to be shared between more than one site for billing.
Enable Vendor	Records the Vendor and Vendor Rate on the service. If enabled, vendor fields are required when adding a service.
Enable Discounts	Option to allow discounts on a service. *Additional setup is required.*

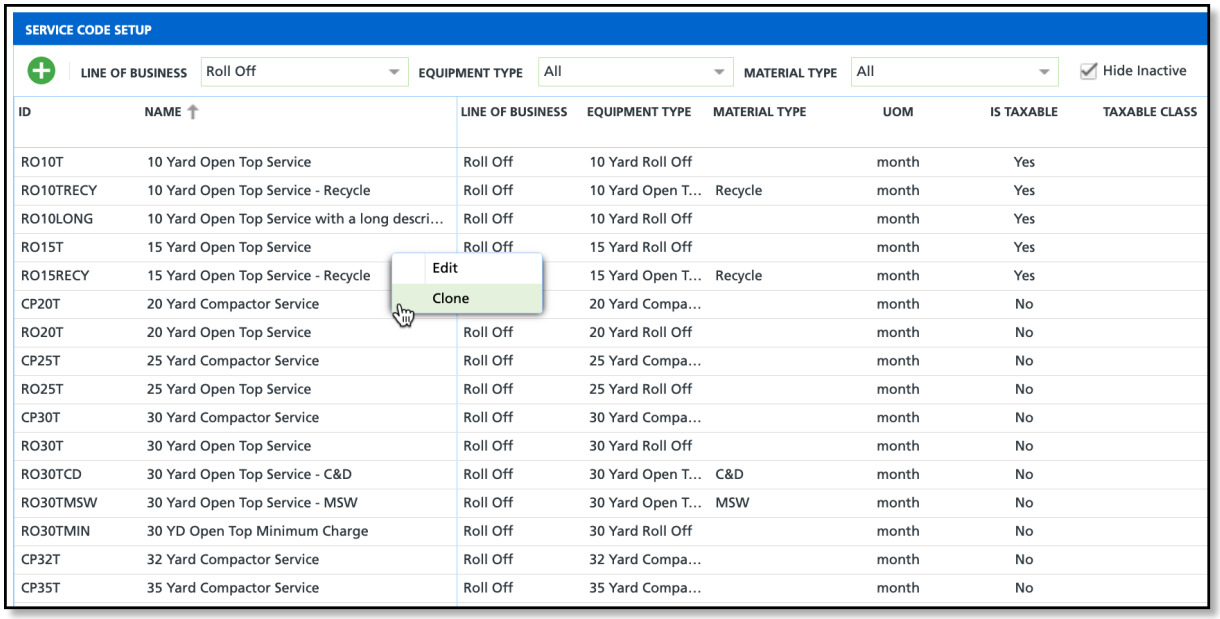
Add Service Code

1. Select the Add icon '+' icon from the Service Code Setup screen to open the **Add Service Code** editor.
2. Complete the following required fields:
    - Enter a **Service Code.**
    - Enter a **Name** for the Service Code that will be used when listed.
    - Select a **Line Of Business** for this Service Code to be used for.
    - Select the **Unit of Measurement** this Service Code will use to measure material.
3. Complete additional fields based on your company's setup requirements.
4. Click **Save** when finished.

As a reminder, after creating a service code, navigate to the Available Service Code Setup screen to define its availability within the division's service regions. A service code won't be applicable until its availability is set.

Clone Service Code

To simplify the process of adding a new service code that is similar to an existing one, a cloning feature is available. A clone creates an identical record of an existing service code that can be easily modified to create a new one.

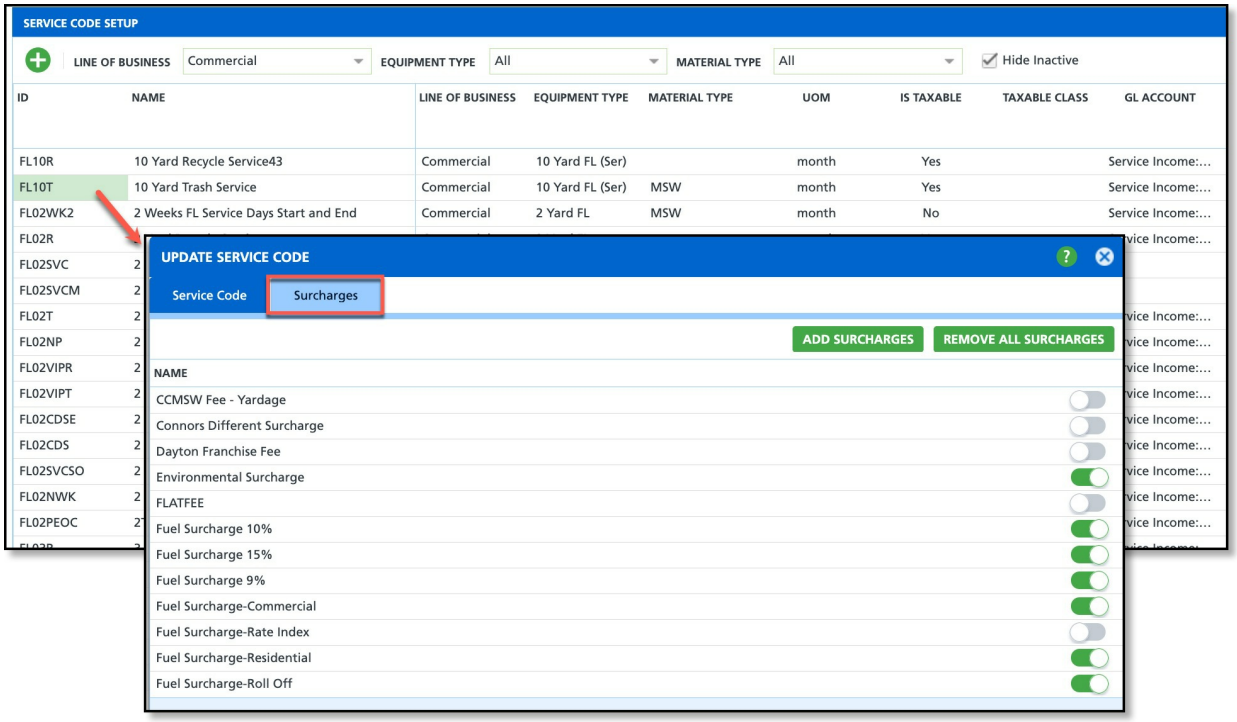


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RO10T	10 Yard Open Top Service	Roll Off	10 Yard Roll Off		month	Yes	
RO10TRECY	10 Yard Open Top Service - Recycle	Roll Off	10 Yard Open T...	Recycle	month	Yes	
RO10LONG	10 Yard Open Top Service with a long descri...	Roll Off	10 Yard Roll Off		month	Yes	
RO15T	15 Yard Open Top Service	Roll Off	15 Yard Roll Off		month	Yes	
RO15RECY	15 Yard Open Top Service - Recycle	Roll Off	15 Yard Open T...	Recycle	month	Yes	
CP20T	20 Yard Compactor Service	Roll Off	20 Yard Compa...		month	No	
RO20T	20 Yard Open Top Service	Roll Off	20 Yard Roll Off		month	No	
CP25T	25 Yard Compactor Service	Roll Off	25 Yard Compa...		month	No	
RO25T	25 Yard Open Top Service	Roll Off	25 Yard Roll Off		month	No	
CP30T	30 Yard Compactor Service	Roll Off	30 Yard Compa...		month	No	
RO30T	30 Yard Open Top Service	Roll Off	30 Yard Roll Off		month	No	
RO30TCD	30 Yard Open Top Service - C&D	Roll Off	30 Yard Open T...	C&D	month	No	
RO30TMSW	30 Yard Open Top Service - MSW	Roll Off	30 Yard Open T...	MSW	month	No	
RO30TMIN	30 YD Open Top Minimum Charge	Roll Off	30 Yard Roll Off		month	No	
CP32T	32 Yard Compactor Service	Roll Off	32 Yard Compa...		month	No	
CP35T	35 Yard Compactor Service	Roll Off	35 Yard Compa...		month	No	

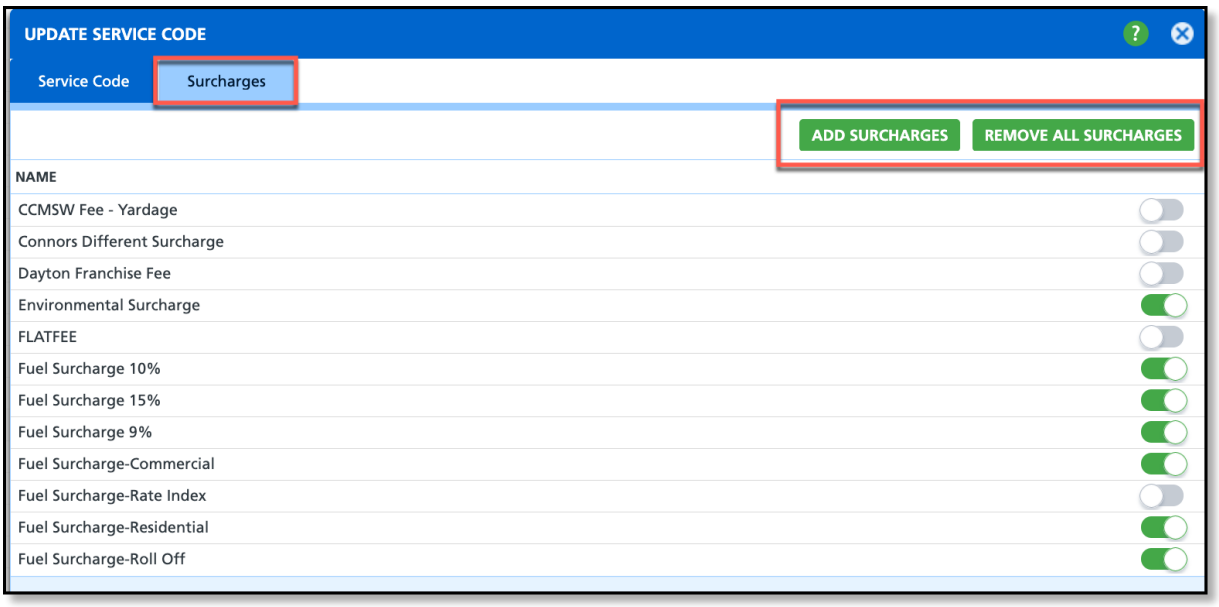
1.
    a. Right click on the service code you would like to use as the clone.
    b. Select **'Clone'** and the Clone Service Code editor will display.
    c. Edit fields specific to the new service code.
    d. Click **Save** when finished.

Add Surcharges

After saving a new service code or updating an existing one, the Surcharges tab will display next to the Service Code tab. Select the tab to apply default surcharges to a service code. Additional information on surcharges can be reviewed here: Surcharge Setup.

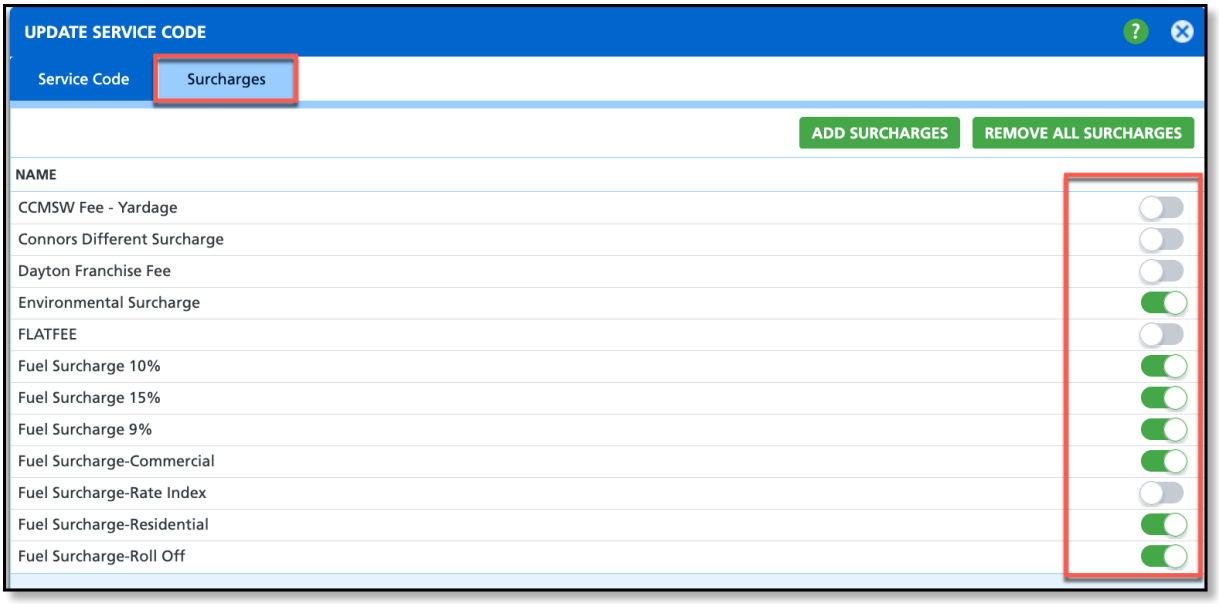


Add Surcharges / Remove All Surcharges Selections



Option	Description
Add Surcharges	Select and all surcharges listed will be added to the service code. When the service code is used, the added surcharges will be automatically applied.
Remove All Surcharges	Select and all surcharges listed will be removed from the service code.

Toggle Switches



To assign surcharges to a service code individually, use the toggle switch linked with the surcharge. When toggled "on," it will be displayed in green, indicating that the surcharge has been applied.

Available Service Codes

Pathway: *Setup > Services > Available Service Codes*
**Additional Required Setup*

Once a service code has been created, use the **Available Service Code Setup** screen to specify the regions where a service code is available. You can also include any default charge codes and rates that apply based on the division and service region. If a service code is not available to at least one service region, the service code will be displayed as inactive for the division. Further information about Available Service Codes can be found here: Available Service Codes

Related Articles

Surcharge Setup