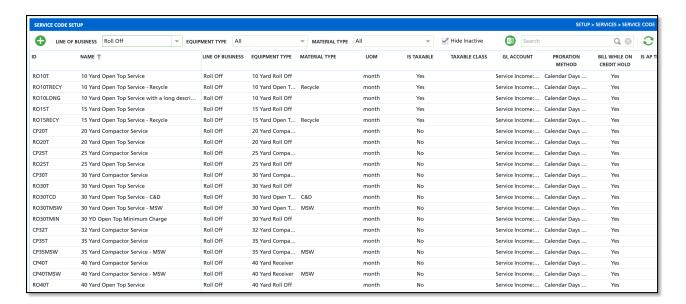
Service Code Setup

Last Modified on 03/11/2025 8:37 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 specify its availability for a division's service regions.



Permissions

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

Permission ID	Permission Name
118	Setup \ Services

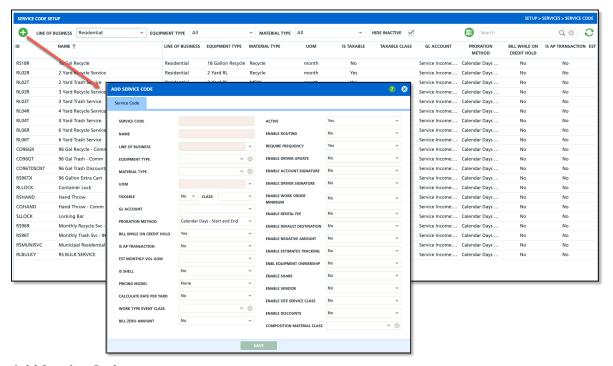
Service Code Field Descriptions

Field	Description
Service Code	The unique ID for the Service Code.
Required	
Name	The Name of the service code that displays in customer service and on an invoice.
Required	The Indine of the service code that displays in customer service and on arribvoice.
Line Of Business	Limits the service code to only be offered to accounts belonging to the selected
Required	Line of Business.
Equipment Type	Identifies the equipment used to perform the service. Selection options are
Equipment Type	dependent on the selected Line of Business.
Material Type	Identifies the type of material collected by the service code.

to f measure indicates how the service is intended to be billed. Inally, the Bill Group's frequency can restrict or prevent the selection of JOM service codes based on the billing frequency of the bill group of to the account. Is if the service code is taxable. Is the GL Account used to track revenue streams associated with the code. In proration method used for the service code. It is continue billing accounts even if the account's status is 'Credit Hold'. It is selected, once the account is removed from credit hold (and the service is eve), the system will prorate to catch the account up in the next billing cycle. Whether this Service Code is an AP transaction so that the matching invoice reated. In the service code is an AP transaction so that the matching invoice reated. In the service code is an AP transaction so that the matching invoice reated.
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e the estimated monthly volume for this service.
as the pricing model the service will use
es the pricing model the service will use
as the pricing model the service will use.
ervice Code requires to calculate the Rate per cubic yard.
d setup for routing and scheduling this service that will determine the pes available or used for this Service Code.
s if the service code is available for use.
the service for routing. Services that do not require routing such as a lock charge, should not be enabled.
s the user to select a frequency when creating a service. If frequency is not d, servicing is offered as an 'on call' basis.
or linking site services. This field displays only when the <i>Enable Routing</i> and <i>Frequency</i> fields are set to 'No.' If service linking will be used, enable this the child service that will be linked to a parent service.
user to require a signature entry for the driver for manifested waste. al setup is required.
to capture the customer's signature after servicing the location. al setup is required.
ed, prompts the driver to sign the for service the upon completion.
t

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	Displays the Default Destination field when adding a service. After a user makes a
Destination	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 Estimate Tracking	
ENBL Equipment	Allows a user to define who owns the equipment.
Ownership	
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 Site Service Class	
Enable Discounts	Option to allow discounts on a service. Additional setup is required.
Composition Material	
Class	

Add a Service Code



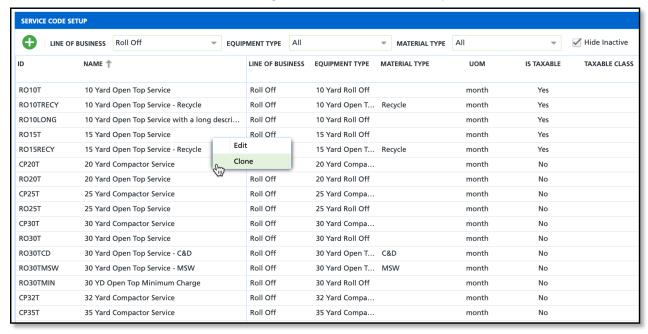
Add Service Code

- 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.

Clone Service Code

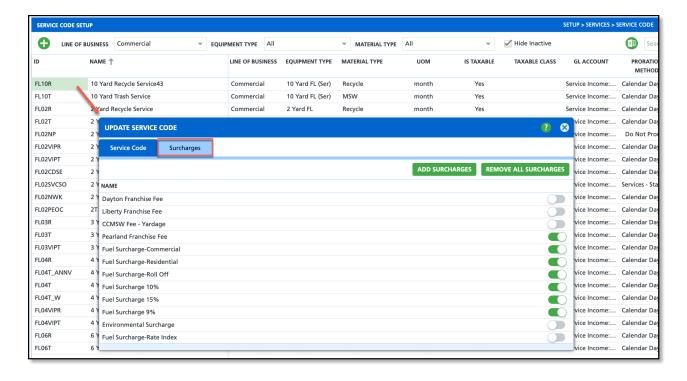
To simplify the process of adding a new service code that is similar to an existing one, a cloning feature is available. A clone creates an identical record of an existing service code that can be easily modified to create a new one.



- 1. Right click on the service code you would like to use as the clone.
- 2. Select 'Clone' and the Clone Service Code editor will display.
- 3. Edit fields specific to the new service code.
- 4. Click Save when finished.

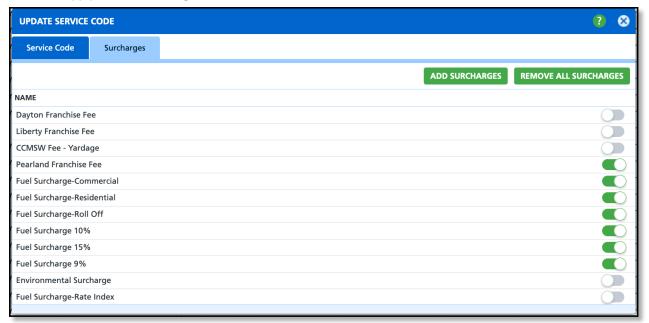
Add Surcharges

After saving a new service code or updating an existing one, the Surcharges tab will display with the Service Code tab.



Surcharges

After a service code has been saved, or upon editing an existing service code, the Surcharges tab will display. Select the tab to apply default surcharges to a service code.



Surcharge Add/Remove Button Options

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	Select and all surcharges listed will be removed from the service code.
Surcharges	

Surcharge Setup

To assign surcharges to a service code individually, use the toggle button 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 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