

# Service Code Setup

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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.

SERVICE CODE SETUP										
LINE OF BUSINESS		Roll Off	EQUIPMENT TYPE		All	MATERIAL TYPE		All	<input checked="" type="checkbox"/> Hide Inactive	Search
ID	NAME	LINE OF BUSINESS	EQUIPMENT TYPE	MATERIAL TYPE	UOM	IS TAXABLE	TAXABLE CLASS	GL ACCOUNT	PRORATION METHOD	BILL WHILE ON CREDIT HOLD
RO10T	10 Yard Open Top Service	Roll Off	10 Yard Roll Off		month	Yes		Service Income:...	Calendar Days ...	Yes
RO10TREC	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
RO15TREC	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

## Service Code Field Descriptions

Field	Description
Service Code <i>Required</i>	The unique ID for the Service Code.
Name <i>Required</i>	The Name of the service code that displays in customer service and on an invoice.
Line Of Business <i>Required</i>	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.

<b>UOM</b> <i>Required</i>	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 <b>bill group</b> assigned to the account.
<b>Taxable</b>	Indicates if the service code is taxable.
<b>GL Account</b>	Specifies the GL Account used to track revenue streams associated with the service code.
<b>Proration Method</b>	Select the proration method used for the service code.
<b>Bill While On Credit Hold</b>	Option to continue billing accounts even if the account's status is 'Credit 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.
<b>Is AP Transaction</b>	Select whether this Service Code is an AP transaction so that the matching invoice can be created.
<b>Est Monthly Vol UOM</b>	If estimation is Enabled, this is the Unit Of Measurement that will be used to measure the estimated monthly volume for this service.
<b>Is Shell</b>	
<b>Pricing Model</b>	Identifies the pricing model the service will use.
<b>Calculate Rate Per Yard</b>	If this Service Code requires to calculate the Rate per cubic yard.
<b>Work Type Event Class</b>	Required setup for routing and scheduling this service that will determine the Work Types available or used for this Service Code.
<b>Active</b>	Controls if the service code is available for use.
<b>Enable Routing</b>	Enables the service for routing. Services that do not require routing such as a monthly lock charge, should not be enabled.
<b>Require Frequency</b>	Requires the user to select a frequency when creating a service. If frequency is not required, servicing <i>is offered as an 'on call' basis</i> .
<b>Enable Parent Service Linking</b>	Allows for linking site services. This field displays only when the <i>Enable Routing</i> and <i>Require Frequency</i> fields 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.
<b>Enable Driver Update</b>	Allows a user to require a signature entry for the driver for manifested waste. <i>Additional setup is required.</i>
<b>Enable Account Signature</b>	Option to capture the customer's signature after servicing the location. <i>Additional setup is required.</i>
<b>Enable Driver Signature</b>	If enabled, prompts the driver to sign the for service the upon completion.
<b>Enable Recurring Minimum</b>	Only displays if the Recurring Minimum Charge Code field for the line of business is populated, otherwise this field does not display.  <i><b>*Important:</b> 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.</i>

<b>Enable Work Order Minimum</b>	Allows a user to define a minimum amount that must be charged on a work order. <i>Additional setup is required.</i>
<b>Enable Rental Fee</b>	Allows a user to define a daily inactivity rental fee on the equipment provided by the service.
<b>Enable Default Destination</b>	Displays the Default Destination field when adding a service. After a user makes a selection, it will auto-populate on a work order.
<b>Enable Negative Amount</b>	Allows a user to set a negative amount for the rate for the service.
<b>Enable Estimate Tracking</b>	
<b>ENBL Equipment Ownership</b>	Allows a user to define who owns the equipment.
<b>Enable Share</b>	Allows a user to set this Service Code to be shared between more than one site for billing.
<b>Enable Vendor</b>	Records the Vendor and Vendor Rate on the service. If enabled, vendor fields are required when adding a service.
<b>Enable Site Service Class</b>	
<b>Enable Discounts</b>	Option to allow discounts on a service. <i>Additional setup is required.</i>
<b>Composition Material Class</b>	

## Add a Service Code

The screenshot shows the 'SERVICE CODE SETUP' screen. At the top, there are filters for 'LINE OF BUSINESS' (Residential), 'EQUIPMENT TYPE' (All), 'MATERIAL TYPE' (All), and a 'HIDE INACTIVE' checkbox. A search bar is also present. Below the filters is a table with columns: 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 TRANSACTION, and EST. A red arrow points to a '+' icon in the top left corner of this table.

The 'ADD SERVICE CODE' dialog box is open, showing the following fields:

- SERVICE CODE:** (Text input)
- NAME:** (Text input)
- LINE OF BUSINESS:** (Dropdown menu)
- EQUIPMENT TYPE:** (Dropdown menu)
- MATERIAL TYPE:** (Dropdown menu)
- UOM:** (Dropdown menu)
- TAXABLE:** (Yes/No dropdown)
- GL ACCOUNT:** (Dropdown menu)
- PRORATION METHOD:** (Dropdown menu)
- BILL WHILE ON CREDIT HOLD:** (Yes/No dropdown)
- IS AP TRANSACTION:** (Yes/No dropdown)
- EST MONTHLY VOL UOM:** (Text input)
- IS SHELL:** (Yes/No dropdown)
- PRICING MODEL:** (Dropdown menu)
- CALCULATE RATE PER YARD:** (Yes/No dropdown)
- WORK TYPE EVENT CLASS:** (Dropdown menu)
- BILL ZERO AMOUNT:** (Yes/No dropdown)
- ACTIVE:** (Yes/No dropdown)
- ENABLE ROUTING:** (Yes/No dropdown)
- REQUIRE FREQUENCY:** (Yes/No dropdown)
- ENABLE DRIVER UPDATE:** (Yes/No dropdown)
- ENABLE ACCOUNT SIGNATURE:** (Yes/No dropdown)
- ENABLE DRIVER SIGNATURE:** (Yes/No dropdown)
- ENABLE WORK ORDER MINIMUM:** (Yes/No dropdown)
- ENABLE RENTAL FEE:** (Yes/No dropdown)
- ENABLE DEFAULT DESTINATION:** (Yes/No dropdown)
- ENABLE NEGATIVE AMOUNT:** (Yes/No dropdown)
- ENABLE ESTIMATES TRACKING:** (Yes/No dropdown)
- ENBL EQUIPMENT OWNERSHIP:** (Yes/No dropdown)
- ENABLE SHARE:** (Yes/No dropdown)
- ENABLE VENDOR:** (Yes/No dropdown)
- ENABLE SITE SERVICE CLASS:** (Yes/No dropdown)
- ENABLE DISCOUNTS:** (Yes/No dropdown)
- COMPOSITION MATERIAL CLASS:** (Dropdown menu)

A 'SAVE' button is located at the bottom right of the dialog box.

### 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.

SERVICE CODE SETUP							
<div> <div>+</div> <div>LINE OF BUSINESS</div> <div>Roll Off</div> </div>		<div> <div>EQUIPMENT TYPE</div> <div>All</div> </div>		<div> <div>MATERIAL TYPE</div> <div>All</div> </div>		<div> <input checked="" type="checkbox"/> Hide Inactive         </div>	
ID	NAME ↑	LINE OF BUSINESS	EQUIPMENT TYPE	MATERIAL TYPE	UOM	IS TAXABLE	TAXABLE CLASS
RO10T	10 Yard Open Top Service	Roll Off	10 Yard Roll Off		month	Yes	
RO10TREC	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	
RO15REC	15 Yard Open Top Service - Recycle		15 Yard Open T...	Recycle	month	Yes	
CP20T	20 Yard Compactor Service		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. 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.

+

LINE OF BUSINESS

Commercial

EQUIPMENT TYPE

All

MATERIAL TYPE

All

☒ Hide Inactive

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SEARCH

ID	NAME ↑	LINE OF BUSINESS	EQUIPMENT TYPE	MATERIAL TYPE	UOM	IS TAXABLE	TAXABLE CLASS	GL ACCOUNT	PRORATION METHOD
FL10R	10 Yard Recycle Service43	Commercial	10 Yard FL (Ser)	Recycle	month	Yes		Service Income:...	Calendar Day
FL10T	10 Yard Trash Service	Commercial	10 Yard FL (Ser)	MSW	month	Yes		Service Income:...	Calendar Day
FL02R	2 Yard Recycle Service	Commercial	2 Yard FL	Recycle	month	Yes		Service Income:...	Calendar Day
FL02T	2 Yard Trash Service	Commercial	2 Yard FL	MSW	month	Yes		Service Income:...	Calendar Day
FL02NP	2 Yard No Pay Service	Commercial	2 Yard FL	MSW	month	Yes		Service Income:...	Do Not Pro
FL02VIPR	2 Yard VIP Recycle Service	Commercial	2 Yard FL	Recycle	month	Yes		Service Income:...	Calendar Day
FL02VIPT	2 Yard VIP Trash Service	Commercial	2 Yard FL	MSW	month	Yes		Service Income:...	Calendar Day
FL02CDSE	2 Yard Commercial Dumpster Service	Commercial	2 Yard FL	Recycle	month	Yes		Service Income:...	Calendar Day
FL02SVCSO	2 Yard Service Vehicle Surcharge	Commercial	2 Yard FL	Recycle	month	Yes		Service Income:...	Services - Sta
FL02NWK	Dayton Franchise Fee	Commercial	2 Yard FL	Recycle	month	Yes		Service Income:...	Calendar Day
FL02PEOC	Liberty Franchise Fee	Commercial	2 Yard FL	Recycle	month	Yes		Service Income:...	Calendar Day
FL03R	CCMSW Fee - Yardage	Commercial	3 Yard FL	Recycle	month	Yes		Service Income:...	Calendar Day
FL03T	Pearland Franchise Fee	Commercial	3 Yard FL	Recycle	month	Yes		Service Income:...	Calendar Day
FL03VIPT	Fuel Surcharge-Commercial	Commercial	3 Yard FL	Recycle	month	Yes		Service Income:...	Calendar Day
FL04R	Fuel Surcharge-Residential	Commercial	4 Yard FL	Recycle	month	Yes		Service Income:...	Calendar Day
FL04T_ANNV	Fuel Surcharge-Roll Off	Commercial	4 Yard FL	Recycle	month	Yes		Service Income:...	Calendar Day
FL04T	Fuel Surcharge 10%	Commercial	4 Yard FL	Recycle	month	Yes		Service Income:...	Calendar Day
FL04T_W	Fuel Surcharge 15%	Commercial	4 Yard FL	Recycle	month	Yes		Service Income:...	Calendar Day
FL04VIPR	Fuel Surcharge 9%	Commercial	4 Yard FL	Recycle	month	Yes		Service Income:...	Calendar Day
FL04VIPT	Environmental Surcharge	Commercial	4 Yard FL	Recycle	month	Yes		Service Income:...	Calendar Day
FL06R	Fuel Surcharge-Rate Index	Commercial	6 Yard FL	Recycle	month	Yes		Service Income:...	Calendar Day
FL06T		Commercial	6 Yard FL	Recycle	month	Yes		Service Income:...	Calendar Day

UPDATE SERVICE CODE

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Service Code

Surcharges

ADD SURCHARGES

REMOVE ALL SURCHARGES

NAME	
Dayton Franchise Fee	<input type="checkbox"/>
Liberty Franchise Fee	<input type="checkbox"/>
CCMSW Fee - Yardage	<input type="checkbox"/>
Pearland Franchise Fee	<input checked="" type="checkbox"/>
Fuel Surcharge-Commercial	<input checked="" type="checkbox"/>
Fuel Surcharge-Residential	<input checked="" type="checkbox"/>
Fuel Surcharge-Roll Off	<input checked="" type="checkbox"/>
Fuel Surcharge 10%	<input checked="" type="checkbox"/>
Fuel Surcharge 15%	<input checked="" type="checkbox"/>
Fuel Surcharge 9%	<input checked="" type="checkbox"/>
Environmental Surcharge	<input type="checkbox"/>
Fuel Surcharge-Rate Index	<input type="checkbox"/>

## 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.

UPDATE SERVICE CODE

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Service Code

Surcharges

ADD SURCHARGES

REMOVE ALL SURCHARGES

NAME	
Dayton Franchise Fee	<input type="checkbox"/>
Liberty Franchise Fee	<input type="checkbox"/>
CCMSW Fee - Yardage	<input type="checkbox"/>
Pearland Franchise Fee	<input checked="" type="checkbox"/>
Fuel Surcharge-Commercial	<input checked="" type="checkbox"/>
Fuel Surcharge-Residential	<input checked="" type="checkbox"/>
Fuel Surcharge-Roll Off	<input checked="" type="checkbox"/>
Fuel Surcharge 10%	<input checked="" type="checkbox"/>
Fuel Surcharge 15%	<input checked="" type="checkbox"/>
Fuel Surcharge 9%	<input checked="" type="checkbox"/>
Environmental Surcharge	<input type="checkbox"/>
Fuel Surcharge-Rate Index	<input type="checkbox"/>

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

## 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](#)

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