

Charge Code Setup

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Pathway: Setup > Services > Charge Code

Charge Codes establish the charges available to a Line of Business and are used when billing for a service.

CHARGE CODE SETUP											SETUP > SERVICES > CHARGE CODE
ID	NAME	DOT DESCRIPTION	LINE OF BUSINESS	EQUIPMENT TYPE	MATERIAL TYPE	RATE UOM	IS TAXABLE	TAXABLE CLASS	GL ACCOUNT	TYPE	WEIGHT
ADJ-RO	Adjustment-Roll Off		Roll Off			each	Yes		Service Income:...	Service	N
CCMSWTON	CCMSW FEE		Roll Off			each	Yes		MSW Fees Paya...	Service	N
DISP_CD	Disposal C&D		Roll Off		C&D	ton	No		Other Income	Disposal	Ye
DISP_RECY	Disposal Recycle		Roll Off		Recycle	ton	No		Other Income	Disposal	Ye
DISP_TRASH	Disposal Trash		Roll Off		MSW	ton	No		Other Income	Disposal	Ye
INACTIVITY	Inactivity Fee		Roll Off			yard	No		Other Income	Equipment Utili...	N
ROMUNI	Municipal Roll Off		Roll Off			each	Yes		Service Income:...	Service	N
DISPOCC	OCC collection		Roll Off		Cardboard	ton	No		Other Income	Disposal	Ye
ROPKRHAUL2	Packer Haul 34YD OR LARGER		Roll Off			each	Yes		Service Income:...	Haul	N
ROPKRHAUL1	Packer Haul Less Than 34YD		Roll Off			each	Yes		Service Income:...	Haul	N
ROAFH	Roll Off After Hours		Roll Off			each	Yes		Service Income:...	Service	N
RORENTDAY	Roll Off Daily Rental		Roll Off			each	Yes		Service Income:...	Service	N
RODEL	Roll Off Delivery		Roll Off			each	Yes		Service Income:...	Service	N
ROLFTONS	Roll Off Disposal Per Ton		Roll Off			ton	Yes		Service Income:...	Disposal	Ye
ROLFYARDS	Roll Off Disposal Per Yard		Roll Off			cubic yard	Yes		Service Income:...	Disposal	Ye
RODRY	Roll Off Dry Run		Roll Off			each	Yes		Service Income:...	Service	N
ROHAUL	Roll Off Haul		Roll Off			each	Yes		Service Income:...	Haul	N
ROHAUL40	Roll Off Haul 40YD		Roll Off			each	Yes		Service Income:...	Haul	N
ROLINER	Roll Off Liner / Tarp		Roll Off			each	Yes		Service Income:...	Disposal	Ye
ROMATTRESS	Roll Off Mattress in Load		Roll Off			each	Yes		Service Income:...	Service	N

Permissions

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

Permission ID	Permission Name
118	Setup \ Services

Charge Code Setup Fields and Descriptions

Field	Descriptions
Charge Code <i>Required</i>	The unique ID for the charge code.
Name <i>Required</i>	Name of the charge code that displays on the Service Record and Invoices.
DOT Description	The description that is used to print on a Manifest.
Line Of Business <i>Required</i>	The Line Of Business the charge code belongs to and controls the charges that are available on the work order.
Equipment Type	Identifies the type of equipment the charge code applies. In the Charges tab of the Service Record, the 'Charges must match Equipment' check box will restrict the charge codes that display to only those where the Equipment identified on the charge code matches the Equipment identified on the Service Record.
Material Type	Identifies the type of material the charge code applies. In the Charges tab of the Service Record, the 'Charges must match Material' check box will restrict the charge codes that display to only those where the Material identified on the charge code matches the Material identified on the Service Record.

Rate UOM <i>Required</i>	The Unit Of Measure that is used to calculate the rate.
Taxable	Indicates if the charge code is taxable.
GL Account	The GL Account assigned to the charge code.
Type	The type of charge the charge code applies (Service, Disposal, Delivery, etc.).
Weight Charge	Setup to charge by the weight of the load.
Enable Waste Profile	Allows assignment of EPA waste codes to a charge code.
Accounts Payable Settings	
Is AP Transaction	Select if this transaction is a payment to the customer and a separate AP invoice will be created to match.
Rate Index	Allows selection of a default rate setup.
Threshold Dis. Weight	
Active	
Active	Controls the charge codes availability for use. If inactive, the charge code can not be used.
Enable No Charge Quantity	Default setup that indicates up to what quantity a charge will not be applied.
Enable Max Weight Charge	If enabled, a charge will be applied when the max weight is exceeded.
Estimated Average Weight	Allows a user to identify the average weight on the waste material collected.
Enable Manual Charge	If enabled, the charge code will be an available manual charge.
Enable Minimum	Allows a user to set a minimum amount for the charge code.
Enable Vendor	Allows a user to allow a Vendor tab to appear in the Service Record to complete Vendor details to be set for this Charge Code.
Enable Est. Charge Quantity	Estimate the amount of charges that will be applied during a service.
Pricing Model	Options include: <ul style="list-style-type: none"> • 'None' - No pricing model is needed for this Charge Code. • 'Tiered' - Allows this code to be quoted and billed as Tiered Pricing. • 'Work Order Volume' - Allows this code to be quoted and billed by volume on the Work Order.
Bill Zero Amount Charge	Option to display the charge code on the invoice if the charge code is billed with a quantity greater than zero where the amount is \$0.00.
Default Quantity <i>Required</i>	The amount entered here is automatically applied to the Quantity field on the work order for the charge code.
Mobile App Settings	
Hide In Driver Apps	Controls the availability of the charge code in the NavuNav driver app.
Require Collection Test	If enabled, requires the driver to complete collection testing.
Print Label	If enabled, prompts the system to print labels from NavuNav and Core for the quantity of containers collected.

Add Charge Code

CHARGE CODE SETUP

LINE OF BUSINESS: Roll Off EQUIP TYPE: All MATERIAL TYPE: All Hide Inactive

ID	NAME ↑	DOT DESCRIPTION	LINE OF BUSINESS	EQUIPMENT TYPE	MATERIAL TYPE	RATE UOM	IS TAXABLE
ADJ-RO	Adjustment-Roll Off		Roll Off			each	Yes
CCMSWTON	CCMSW FEE						Yes
DISP_CD	Disposal C&D						No
DISP_RECY	Disposal Recy						No
DISP_TRASH	Disposal Trash						No
INACTIVITY	Inactivity Fee						No
ROMUNI	Municipal Ro						Yes
DISPOCC	OCC collection						No
ROPKRHAUL2	Packer Haul 2						Yes
ROPKRHAUL1	Packer Haul 1						Yes
ROAFH	Roll Off After						Yes
RORENTDAY	Roll Off Daily						Yes
RODEL	Roll Off Deliv						Yes
ROLFTONS	Roll Off Dispo						Yes
ROLFYARDS	Roll Off Dispo						Yes
RODRY	Roll Off Dry P						Yes

ADD CHARGE CODE

Charge Code

CHARGE CODE	<input type="text"/>	ACTIVE	Yes
NAME	<input type="text"/>	ENABLE NO CHARGE QUANTITY	No
DOT DESCRIPTION	<input type="text"/>	ENABLE NEGATIVE AMOUNT	No
LINE OF BUSINESS	<input type="text"/>	ENABLE MAX. WEIGHT CHARGE	No
EQUIPMENT TYPE	<input type="text"/>	ESTIMATED AVERAGE WEIGHT	<input type="text"/>
MATERIAL TYPE	<input type="text"/>	ENABLE MANUAL CHARGE	No
RATE UOM	<input type="text"/>	ENABLE MINIMUM	No
TAXABLE	No	ENABLE VENDOR	No
GL ACCOUNT	<input type="text"/>	ENABLE EST. CHARGE QUANTITY	No
TYPE	Service	PRICING MODEL	None
WEIGHT CHARGE	No	BILL ZERO AMOUNT CHARGE	No
ENABLE WASTE PROFILE	No	DEFAULT QUANTITY	<input type="text"/>
ERP LABEL	<input type="text"/>	NavuNav Settings	
Accounts Payable Settings		HIDE IN NAVUNAV	No
IS AP TRANSACTION	No	REQUIRE COLLECTION TEST	No
RATE INDEX	<input type="text"/>	PRINT LABEL	No
THRESHOLD DIS. RATE	<input type="text"/>	ENABLE THRESHOLD	No

1. Select the **green '+'** icon to open the **Add Charge Code** editor.
2. Complete the following required fields:
 - o Enter a unique ID in the **Charge Code** field.
 - o Enter a **Name** that will display in drop down selections.
 - o Select the **Line Of Business** the charge code applies to.
 - o Select the **Unit Of Measurement** for rate calculations.
3. Complete additional fields based on your company's setup requirements.
4. Click **Save** when finished.

Clone Charge Code

To simplify the process of adding a new charge code (that is similar to another), a cloning feature is available. A clone creates an identical record of an existing charge code that can be edited to create a new one.

CHARGE CODE SETUP						
ID	NAME ↑	DOT DESCRIPTION	LINE OF BUSINESS	EQUIPMENT TYPE	MATERIAL TYPE	RATE UOM
ADJ-RO	Adjustment-Roll Off		Roll Off			each
CCMSWTON			Roll Off			each
DISP_CD			Roll Off		C&D	ton
DISP_RECY	Disposal Recycle		Roll Off		Recycle	ton
DISP_TRASH	Disposal Trash		Roll Off		MSW	ton
INACTIVITY	Inactivity Fee		Roll Off			yard
ROMUNI	Municipal Roll Off		Roll Off			each
DISPOCC	OCC collection		Roll Off		Cardboard	ton
ROPKRHAUL2	Packer Haul 34YD OR LARGER		Roll Off			each
ROPKRHAUL1	Packer Haul Less Than 34YD		Roll Off			each
ROAFH	Roll Off After Hours		Roll Off			each
RORENTDAY	Roll Off Daily Rental		Roll Off			each

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

Update Charge Code: Tabs

After a charge code has been created and saved, additional tabs are available. Double click on the charge code to open the Update Charge Code popup editor to review and use the tabs.

CHARGE CODE SETUP							SETUP > SERVICES > CHARGE CODE	
ID	NAME ↑	DOT DESCRIPTION	LINE OF BUSINESS	EQUIPMENT TYPE	MATERIAL TYPE	RATE UOM	IS TAXABLE	TAXABLE CLASS
ADJ-CO	Adjustment-Commercial		Commercial			each	Yes	
FLBULK	Bulk Pickup		Commercial		MSW	each	Yes	
FL02XP	Front Load 02YD Extra Pickup		Commercial	2 Yard FL		each	Yes	
FL03XP	Front Load 03YD Extra Pickup	Issue: Account: Site: Steps to ...	Commercial	3 Yard FL		each	Yes	
FL04XP	Front Load 04YD Extra Pickup		Commercial	4 Yard FL		each	Yes	
FL06XP	Front Load 06YD Extra Pickup		Commercial	6 Yard FL		each	Yes	
FL08XP	Front Load 08YD Extra Pickup		Commercial	8 Yard FL		each	Yes	
FL10XP	Front Load 10YD Extra Pickup		Commercial	10 Yard FL		each	Yes	
FLDEL	Front Load Debris		Commercial			each	Yes	
FLINSTALL	Front Load Installation		Commercial			each	Yes	
FLONCALL	Front Load On Call		Commercial			each	Yes	
FLOVRLOAD	Front Load Overload		Commercial			each	Yes	
FLRELOCATE	Front Load Relocate		Commercial			each	Yes	
FLREM	Front Load Removal		Commercial			each	Yes	
FLREPAIR	Front Load Repair		Commercial			each	Yes	
FLREPAIRPT	Front Load Repair Part		Commercial			each	Yes	
FLSWAP	Front Load Swap		Commercial			each	Yes	
IMPORTAR	Imported Appliances		Commercial			each	Yes	
COMUNI	Municipal Commercial		Commercial			each	Yes	
PAPER_COM	Paper Bill Franchise		Commercial			each	Yes	

UPDATE CHARGE CODE

Charge Code | Surcharges | Default for Work Types

ADD ALL SURCHARGES REMOVE ALL SURCHARGES

NAME

Dayton Franchise Fee

Liberty Franchise Fee

CCMSW Fee - Yardage

Pearland Franchise Fee

Fuel Surcharge-Commercial

Fuel Surcharge-Residential

Fuel Surcharge-Roll Off

Fuel Surcharge 10%

Fuel Surcharge 15%

Fuel Surcharge 9%

Environmental Surcharge

Fuel Surcharge-Rate Index

Charge Code

The Charge Code tab includes all the details of the charge code.

UPDATE CHARGE CODE ? X

Charge Code | **Surcharges** | Default for Work Types

CHARGE CODE	FLBULK	ACTIVE	Yes
NAME	Bulk Pickup	ENABLE NO CHARGE QUANTITY	No
DOT DESCRIPTION		ENABLE NEGATIVE AMOUNT	No
LINE OF BUSINESS	Commercial	ENABLE MAX. WEIGHT CHARGE	No UOM
EQUIPMENT TYPE		ESTIMATED AVERAGE WEIGHT	
MATERIAL TYPE	MSW	ENABLE MANUAL CHARGE	No
RATE UOM	each	ENABLE MINIMUM	No
TAXABLE	Yes CLASS	ENABLE VENDOR	No
GL ACCOUNT	Service Income:Commercial Service Incoi	ENABLE EST. CHARGE QUANTITY	No
TYPE	Service	PRICING MODEL	None
WEIGHT CHARGE	No	BILL ZERO AMOUNT CHARGE	Yes
ENABLE WASTE PROFILE	No	DEFAULT QUANTITY	1.00
ERP LABEL		NavuNav Settings	
Accounts Payable Settings		HIDE IN NAVUNAV	No
IS AP TRANSACTION	No	REQUIRE COLLECTION TEST	No
RATE INDEX		PRINT LABEL	No
THRESHOLD DIS. RATE		ENABLE THRESHOLD	No

Surcharges

After a charge code has been saved, the Surcharges tab is available. Select each default surcharge a charge code should include and it will be automatically applied with the charge code in billing.

UPDATE CHARGE CODE ? X

Charge Code | **Surcharges** | Default for Work Types

ADD ALL SURCHARGES **REMOVE ALL SURCHARGES**

NAME	
Dayton Franchise Fee	<input checked="" type="checkbox"/>
Liberty Franchise Fee	<input checked="" 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"/>

Mass Add/Remove Surcharges

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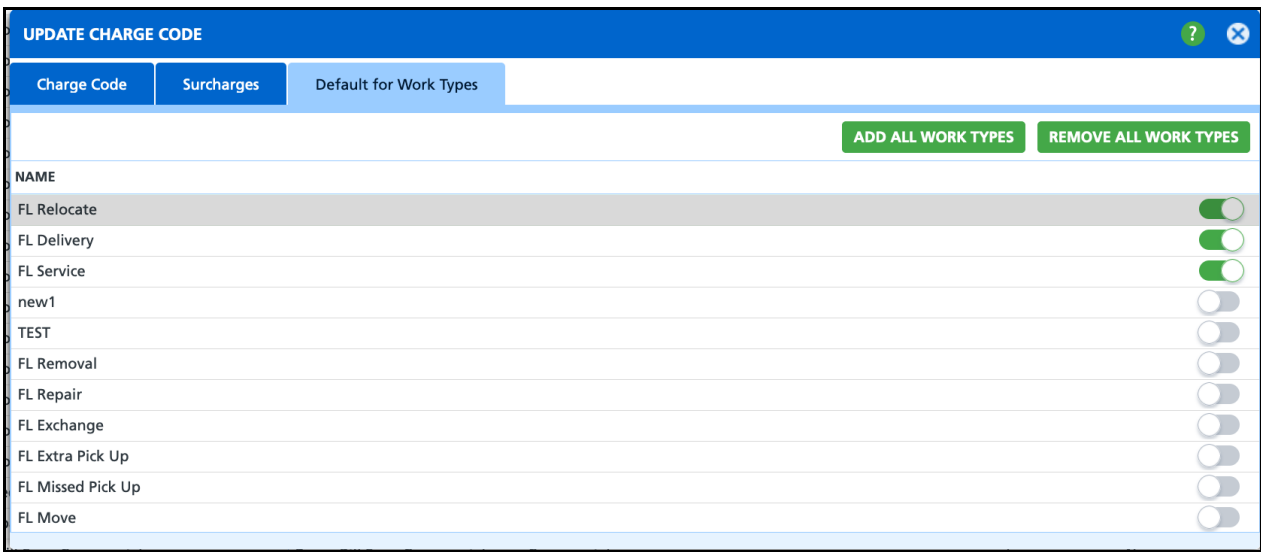
Add Surcharges	Select and all surcharges listed will be added to the charge code. When the charge code is used, the surcharges will be automatically applied.
Remove All Surcharges	Select and all surcharges listed will be removed from the charge code.

Individually Add/Remove a Surcharge

Use the toggle buttons associated to the surcharge to add it or remove it from the charge code.

Default for Work Types

The Default Work Types tab identifies the work types that should be automatically applied when a charge code is used. When adding a new charge code, the Default Work Types tab displays after the charge code has been saved.



Mass Add/Remove Default Work Types

Option	Description
All All Work Types	Select to assign all listed work types to the charge code.
Remove All Work Types	Select to remove any assigned work types listed from the charge code.

Individually Add/Remove Default Work Types

Use the toggle buttons associated to the work type to add it or remove it from the charge code.