

# 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. This is the first step in setting up charge codes for use in active services, work orders, and the driver app. After creating a charge code, it must be configured in the [Available Charge Code](#) screen to make it available.

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 Util...	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

## Field Descriptions

Field	Descriptions
<b>Charge Code</b> <i>Required</i>	The unique ID for the charge code.
<b>Name</b> <i>Required</i>	Name of the charge code that displays on the Service Record and Invoices.
<b>DOT Description</b>	The description that is used to print on a Manifest.
<b>Line Of Business</b> <i>Required</i>	The Line Of Business the charge code belongs to and controls the charges that are available on the work order.
<b>Equipment Type</b>	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.

<b>Material Type</b>	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.
<b>Rate UOM</b> <i>Required</i>	The Unit Of Measure that is used to calculate the rate.
<b>Taxable</b>	Indicates if the charge code is taxable and should be included in tax calculations.
<b>GL Account</b>	Specifies the GL Account used to track revenue streams associated with the charge code.
<b>Type</b>	The type of charge the charge code applies (Service, Disposal, Delivery, etc.).
<b>Weight Charge</b>	Setup to charge by the weight of the load.
<b>Enable Waste Profile</b>	Allows assignment of EPA waste codes to a charge code.
<b>Accounts Payable Settings</b>	
<b>Is AP Transaction</b>	Select if this transaction is a rebate or refund payment is to be issued to the customer, a separate AP invoice will be created separate from Non-AP Transaction Invoices.
<b>Rate Index</b>	Allows selection of a default rate setup.
<b>Threshold Dis. Weight</b>	
<b>Active</b>	
<b>Active</b>	Controls the charge codes availability for use. If inactive, the charge code can not be used.
<b>Enable No Charge Quantity</b>	Default setup that indicates up to what quantity a charge will not be applied.
<b>Enable Max Weight Charge</b>	If enabled, a charge will be applied when the max weight is exceeded.
<b>Estimated Average Weight</b>	Allows a user to identify the average weight on the waste material collected.
<b>Enable Manual Charge</b>	If enabled, the charge code will be an available manual charge.
<b>Enable Minimum</b>	Allows a user to set a minimum amount for the charge code.
<b>Enable Vendor</b>	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.
<b>Enable Est. Charge Quantity</b>	Estimate the amount of charges that will be applied during a service.
<b>Pricing Model</b>	Options include: <ul style="list-style-type: none"> <li>'None' - No pricing model is needed for this Charge Code.</li> <li>'Tiered' - Allows this code to be quoted and billed as Tiered Pricing.</li> <li>'Work Order Volume' - Allows this code to be quoted and billed by volume on the Work Order.</li> </ul>
<b>Bill Zero Amount Charge</b>	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.  If set to <b>No</b> , a \$0 charge will not appear in the Preview Invoice screen and will not be included on the generated invoice.

<b>Default Quantity</b> <i>Required</i>	The amount entered here is automatically applied to the Quantity field on the work order for the charge code.
<b>Mobile App Settings</b>	
<b>Hide In Driver Apps</b>	Controls the availability of the charge code in the NavuNav driver app. If enabled, the driver can select it as an additional charge when servicing a stop.
<b>Require Collection Test</b>	If enabled, requires the driver to complete collection testing.
<b>Print Label</b>	If enabled, prompts the system to print labels from NavuNav and Core for the quantity of containers collected.

## Add a Charge Code

Follow the process outlined here to add a new charge code. This is the first step in setting up charge codes for use in active services, work orders, and the driver app. After creating a charge code, it must be configured in the [Available Charge Code](#) screen to make it available.

The screenshot displays the 'CHARGE CODE SETUP' interface. At the top, there are filters for 'LINE OF BUSINESS' (Roll Off), 'EQUIP TYPE' (All), and 'MATERIAL TYPE' (All), along with a 'Hide Inactive' checkbox. Below this is a table of existing charge codes with columns for ID, NAME, DOT DESCRIPTION, LINE OF BUSINESS, EQUIPMENT TYPE, MATERIAL TYPE, RATE UOM, and IS TAXABLE. A red arrow points from a green '+' icon in the table to the 'ADD CHARGE CODE' modal form. The modal form contains the following fields:

- Charge Code (text input)
- Name (text input)
- Dot Description (text input)
- Line of Business (dropdown)
- Equipment Type (dropdown)
- Material Type (dropdown)
- Rate UOM (dropdown)
- Taxable (checkbox)
- Class (dropdown)
- GL Account (dropdown)
- Type (dropdown)
- Weight Charge (checkbox)
- Enable Waste Profile (checkbox)
- ERP Label (dropdown)
- Accounts Payable Settings:
  - IS AP Transaction (checkbox)
  - Rate Index (dropdown)
  - Threshold Dis. Rate (text input)
  - Enable Threshold (checkbox)
- Active (checkbox)
- Enable No Charge Quantity (checkbox)
- Enable Negative Amount (checkbox)
- Enable Max. Weight Charge (checkbox)
- Estimated Average Weight (text input)
- Enable Manual Charge (checkbox)
- Enable Minimum (checkbox)
- Enable Vendor (checkbox)
- Enable Est. Charge Quantity (checkbox)
- Pricing Model (dropdown)
- Bill Zero Amount Charge (checkbox)
- Default Quantity (text input)
- NavuNav Settings:
  - Hide In NavuNav (checkbox)
  - Require Collection Test (checkbox)
  - Print Label (checkbox)

A 'SAVE' button is located at the bottom of the modal form.

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.

- 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 a 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						
<span style="color: green;">+</span>   LINE OF BUSINESS: Roll Off   EQUIP TYPE: All   MATERIAL TYPE: All   <input checked="" type="checkbox"/> Hide Inactive						
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 access its tabs.

**CHARGE CODE SETUP** SETUP > SERVICES > CHARGE CODE

LINE OF BUSINESS: Commercial
EQUIP TYPE: All
MATERIAL TYPE: All
 Hide Inactive

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 Deletion		Commercial			each	Yes	
FLIINSTALL	Front Load Installation		Commercial			each	Yes	
FLONCALL	Front Load On Call		Commercial			each	Yes	
FLORLOAD	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 Article		Commercial			each	Yes	
COMUNI	Municipal Utility		Commercial			each	Yes	
PAPER_COM	Paper Bill		Commercial			each	Yes	

**UPDATE CHARGE CODE**

Charge Code
Surcharges
Default for Work Types

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"/>

## Charge Code

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

**UPDATE CHARGE CODE**

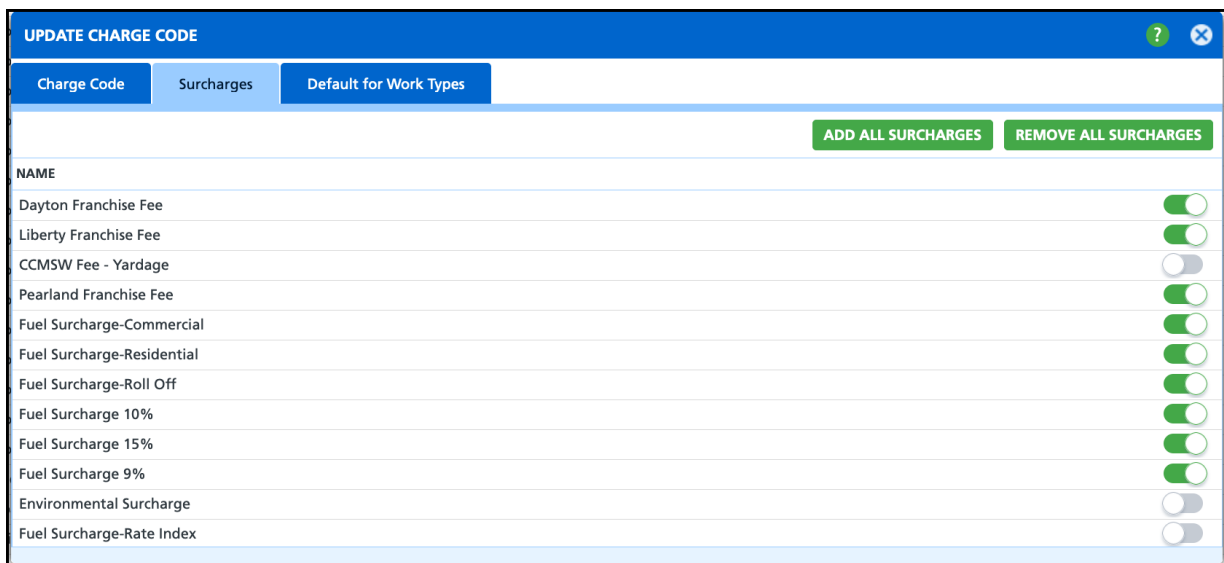
Charge Code
Surcharges
Default for Work Types

<p>CHARGE CODE: <input type="text" value="FLBULK"/></p> <p>NAME: <input type="text" value="Bulk Pickup"/></p> <p>DOT DESCRIPTION: <input type="text"/></p> <p>LINE OF BUSINESS: <input type="text" value="Commercial"/></p> <p>EQUIPMENT TYPE: <input type="text"/></p> <p>MATERIAL TYPE: <input type="text" value="MSW"/></p> <p>RATE UOM: <input type="text" value="each"/></p> <p>TAXABLE: <input type="checkbox"/> Yes <input type="checkbox"/> No <span style="margin-left: 20px;">CLASS: <input type="text"/></span></p> <p>GL ACCOUNT: <input type="text" value="Service Income:Commercial Service Incoi"/></p> <p>TYPE: <input type="text" value="Service"/></p> <p>WEIGHT CHARGE: <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p>ENABLE WASTE PROFILE: <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p>ERP LABEL: <input type="text" value=""/></p> <p>Accounts Payable Settings</p> <p>IS AP TRANSACTION: <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p>RATE INDEX: <input type="text"/></p> <p>THRESHOLD DIS. RATE: <input type="text"/> <span style="margin-left: 20px;">ENABLE THRESHOLD: <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</span></p>	<p>ACTIVE: <input type="checkbox"/> No <input checked="" type="checkbox"/> Yes</p> <p>ENABLE NO CHARGE QUANTITY: <input type="text" value="No"/></p> <p>ENABLE NEGATIVE AMOUNT: <input type="text" value="No"/></p> <p>ENABLE MAX. WEIGHT CHARGE: <input type="text" value="No"/> UOM: <input type="text"/></p> <p>ESTIMATED AVERAGE WEIGHT: <input type="text"/></p> <p>ENABLE MANUAL CHARGE: <input type="text" value="No"/></p> <p>ENABLE MINIMUM: <input type="text" value="No"/></p> <p>ENABLE VENDOR: <input type="text" value="No"/></p> <p>ENABLE EST. CHARGE QUANTITY: <input type="text" value="No"/></p> <p>PRICING MODEL: <input type="text" value="None"/></p> <p>BILL ZERO AMOUNT CHARGE: <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p>DEFAULT QUANTITY: <input type="text" value="1.00"/></p> <p>NavuNav Settings</p> <p>HIDE IN NAVUNAV: <input type="text" value="No"/></p> <p>REQUIRE COLLECTION TEST: <input type="text" value="No"/></p> <p>PRINT LABEL: <input type="text" value="No"/></p>
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## 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.



### Mass Add/Remove Surcharges

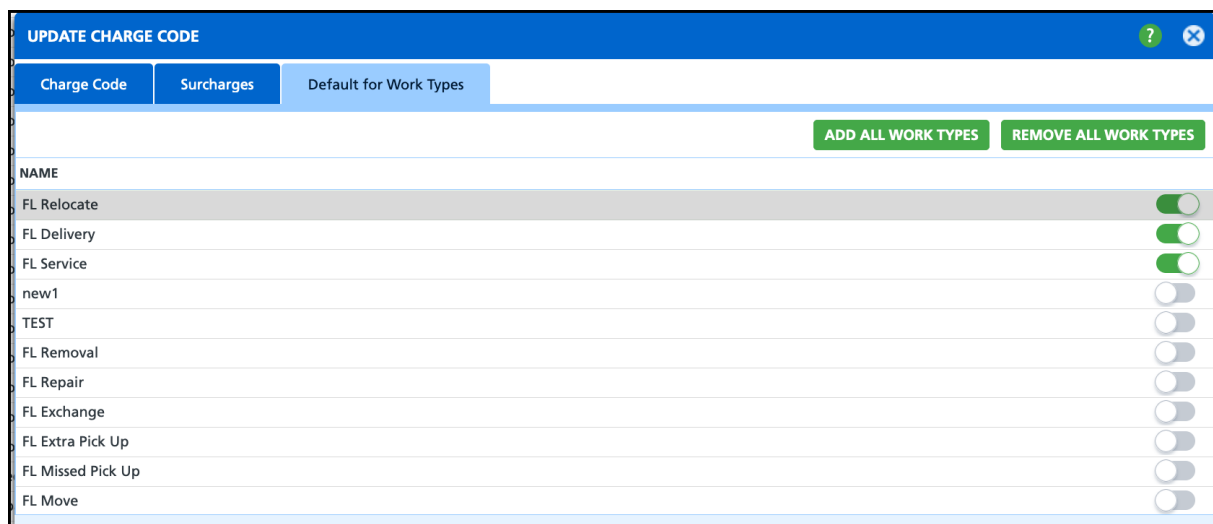
Option	Description
<b>Add Surcharges</b>	Select and all surcharges listed will be added to the charge code. When the charge code is used, the surcharges will be automatically applied.
<b>Remove All Surcharges</b>	Select and all surcharges listed will be removed from the charge code.

### 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.

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## Related Articles

[Available Charge Codes](#)

[Charge Code Tiered Pricing Setup](#)

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