

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
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 and should be included in tax calculations.
GL Account	Specifies the GL Account used to track revenue streams associated with 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 rebate or refund payment is to be issued to the customer, a separate AP invoice will be created separate from Non-AP Transaction Invoices.
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. If set to No , a \$0 charge will not appear in the Preview Invoice screen and will not be included on the generated invoice.
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. If enabled, the driver can select it as an additional charge when servicing a stop.
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 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.

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 Trasl						No
INACTIVITY	Inactivity Fee						No
ROMUNI	Municipal Ro						No
DISPOCC	OCC collectio						Yes
ROPKRHAUL2	Packer Haul 3						Yes
ROPKRHAUL1	Packer Haul L						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 R						Yes

ADD CHARGE CODE

Charge Code

CHARGE CODE:

NAME:

DOT DESCRIPTION:

LINE OF BUSINESS:

EQUIPMENT TYPE:

MATERIAL TYPE:

RATE UOM:

TAXABLE: CLASS:

GL ACCOUNT:

TYPE:

WEIGHT CHARGE:

ENABLE WASTE PROFILE:

ERP LABEL:

Accounts Payable Settings

IS AP TRANSACTION:

RATE INDEX:

THRESHOLD DIS. RATE: ENABLE THRESHOLD:

ACTIVE:

ENABLE NO CHARGE QUANTITY:

ENABLE NEGATIVE AMOUNT:

ENABLE MAX. WEIGHT CHARGE: UOM:

ESTIMATED AVERAGE WEIGHT:

ENABLE MANUAL CHARGE:

ENABLE MINIMUM:

ENABLE VENDOR:

ENABLE EST. CHARGE QUANTITY:

PRICING MODEL:

BILL ZERO AMOUNT CHARGE:

DEFAULT QUANTITY:

NavuNav Settings

HIDE IN NAVUNAV:

REQUIRE COLLECTION TEST:

PRINT LABEL:

SAVE

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 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							
+ 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	<input checked="" type="checkbox"/> Hide Inactive	<input type="text" value="Search"/>
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							
FLIINSTALL	Front Load							
FLONCALL	Front Load							
FLOVRLOAD	Front Load							
FLRELOCATE	Front Load							
FLREM	Front Load							
FLREPAIR	Front Load							
FLREPAIRPT	Front Load							
FLSWAP	Front Load							
IMPORTAR	Imported A							
COMUNI	Municipal							
PAPER_COM	Paper Bill F							

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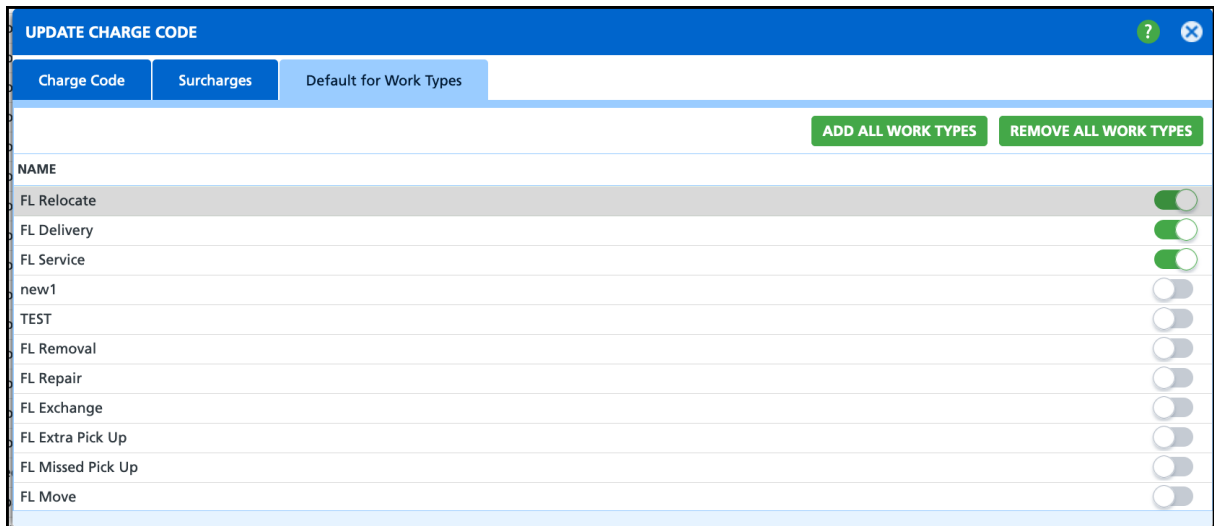
Add Surcharges	Select and all surcharges listed will be added to the charge code. When the charge code is used, the surcharges will be automatically applied.
Remove All Surcharges	Select and all surcharges listed will be removed from the charge code.

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.

Related Articles

[Available Charge Codes](#)

[Charge Code Tiered Pricing Setup](#)