

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 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. 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.

The screenshot shows 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 with columns: ID, NAME, DOT DESCRIPTION, LINE OF BUSINESS, EQUIPMENT TYPE, MATERIAL TYPE, RATE UOM, and IS TAXABLE. A red arrow points to a green '+' icon in the top left corner of the table. An 'ADD CHARGE CODE' modal window is open, showing various configuration fields for a new charge code, including Name, Line of Business, Equipment Type, Material Type, Rate UOM, and various enable/disable options.

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 ? 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 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 |
|-----------------------|--|
| 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

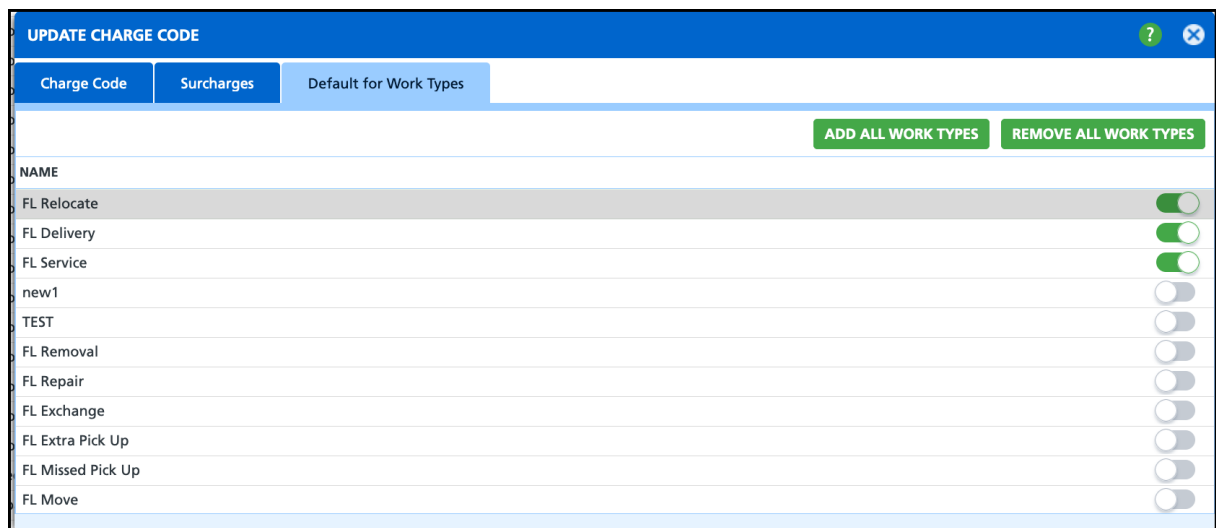
Select and all surcharges listed will be removed from the charge code.

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](#)