Charge Code Setup

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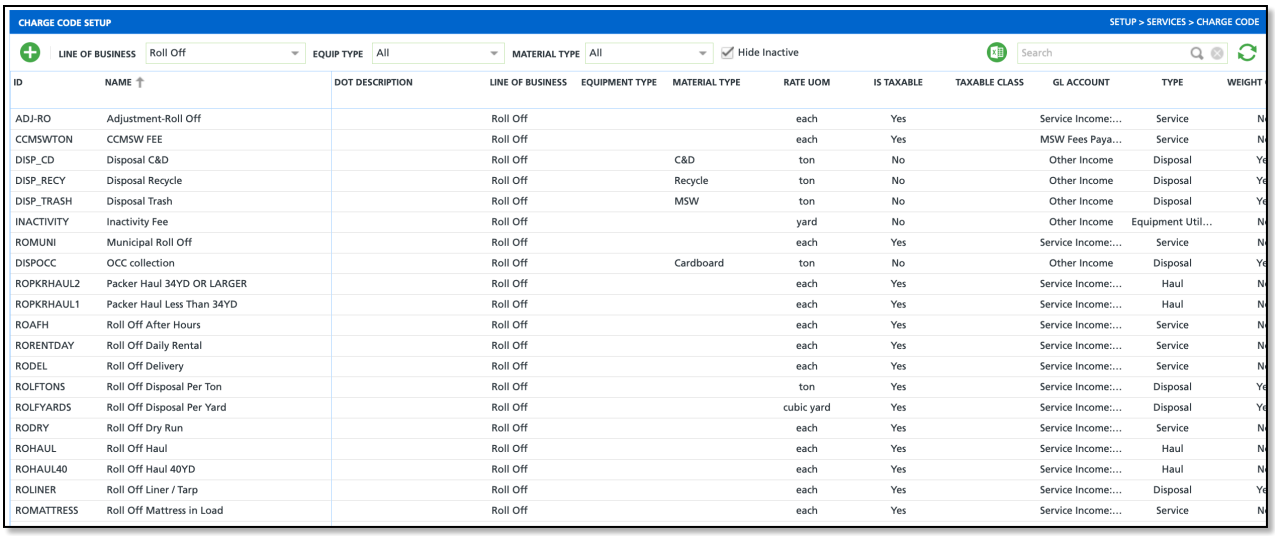
Pathway: *Setup > Services > Charge Code*

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.



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

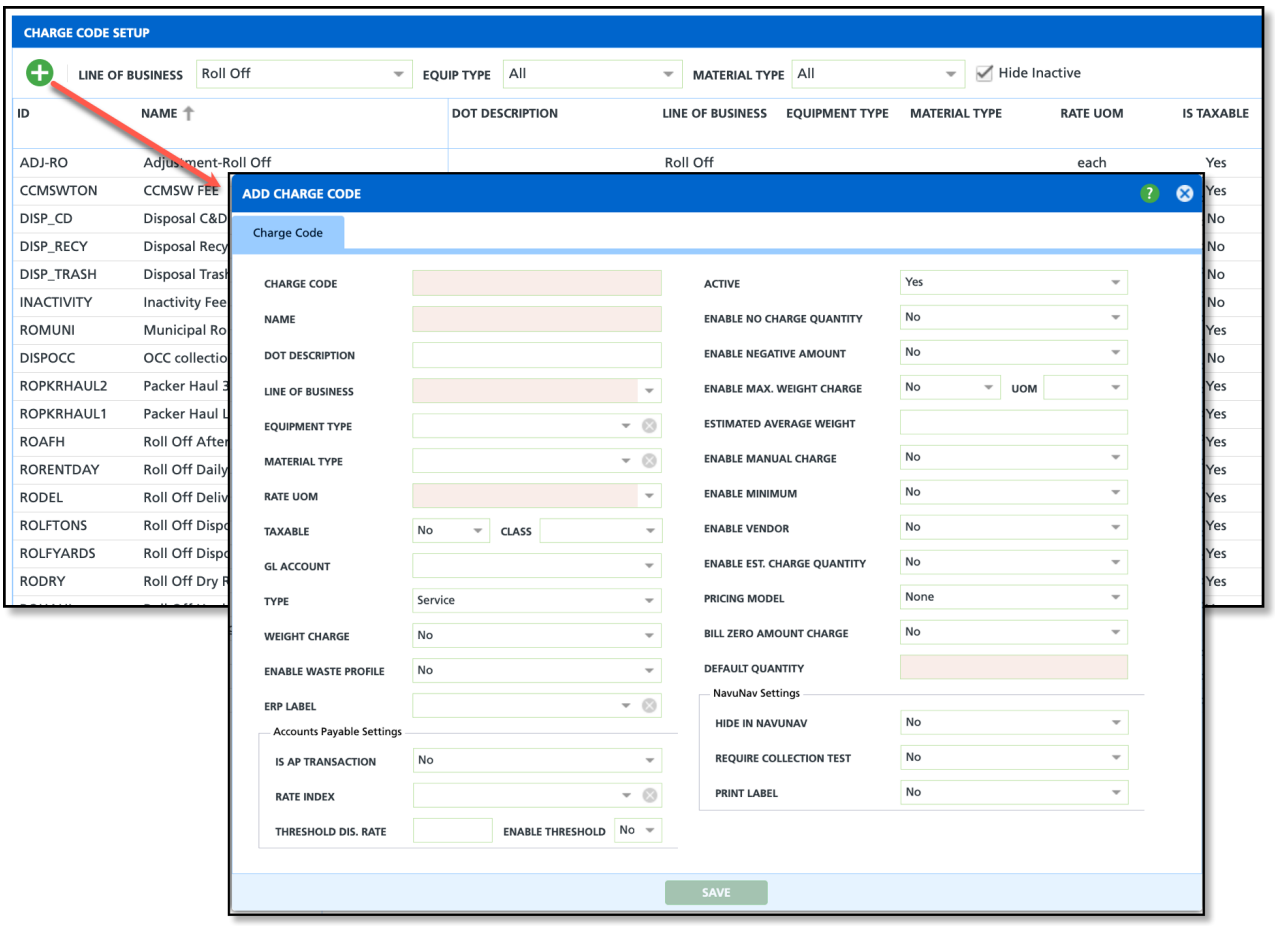
Field	Descriptions
Charge Code *Required*	The unique ID for the charge code.
Name *Required*	Name of the charge code that displays on the Service Record and Invoices.
DOT Description	The description that is used to print on a Manifest.
Line Of Business *Required*	The Line Of Business the charge code 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 *Required*	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	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	Allows a user to **estimate** the quantity of charges that will be applied during a service. This setting affects Active Services and when enabled makes the Est Qty field editable. Note: For On Call and Scheduled Services, the Est. Qty field is enabled at the Line of Business level.
Pricing Model	Options include: • '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 *Required*	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

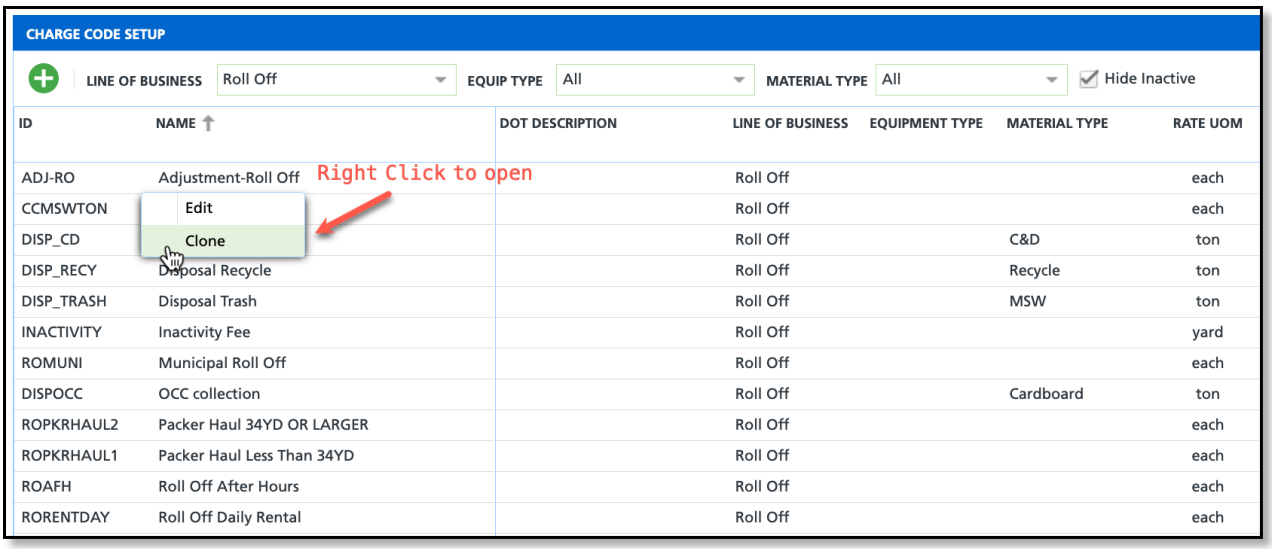
Follow the process outlined here to add a new charge code. This is the first step in setting up charge codes for use in active services, work orders, and the driver app. After creating a charge code, it must be configured in the **Available Charge Code** screen to make it available.



1. Select the **green '+'** icon to open the **Add Charge Code** editor.
2. Complete the following required fields:
    - Enter a unique ID in the **Charge Code** field.
    - Enter a **Name** that will display in drop down selections.
    - 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

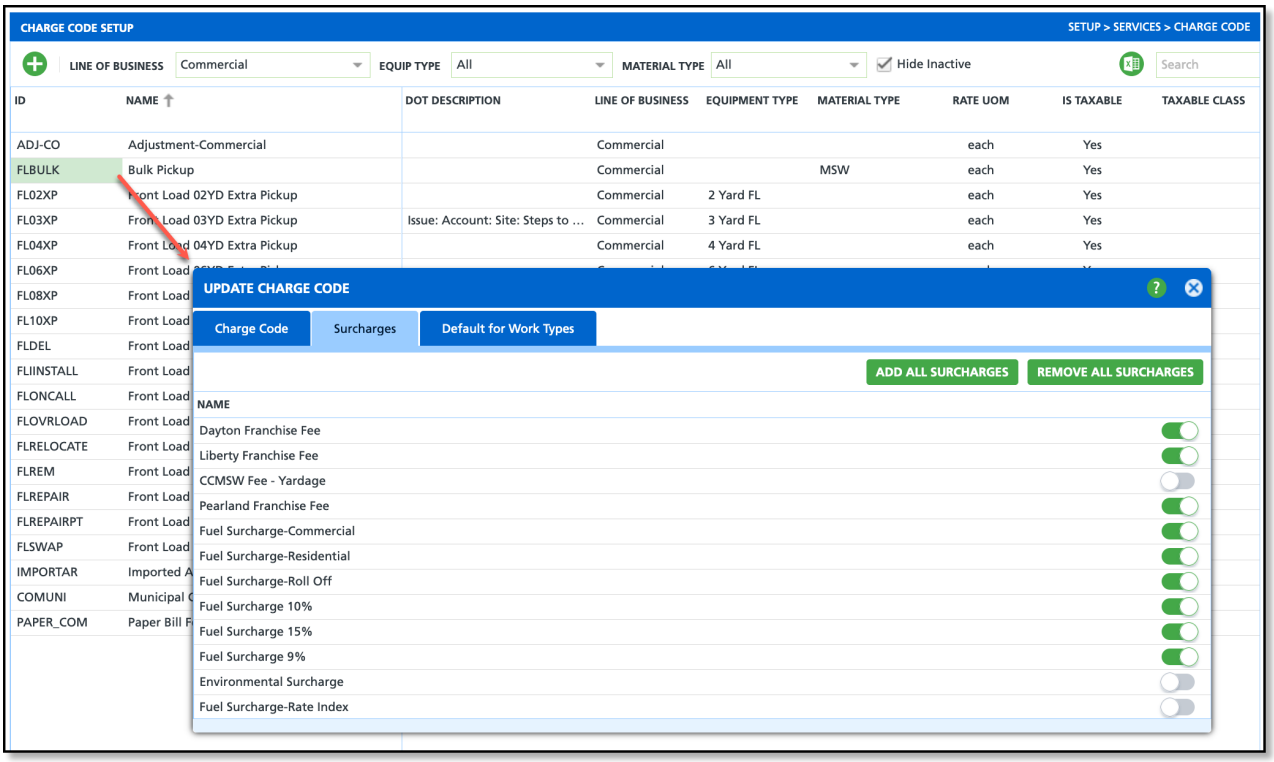
To simplify the process of adding a new charge code (that is similar to another), a cloning feature is available. A clone creates an identical record of an existing charge code that can be edited to create a new one.



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.

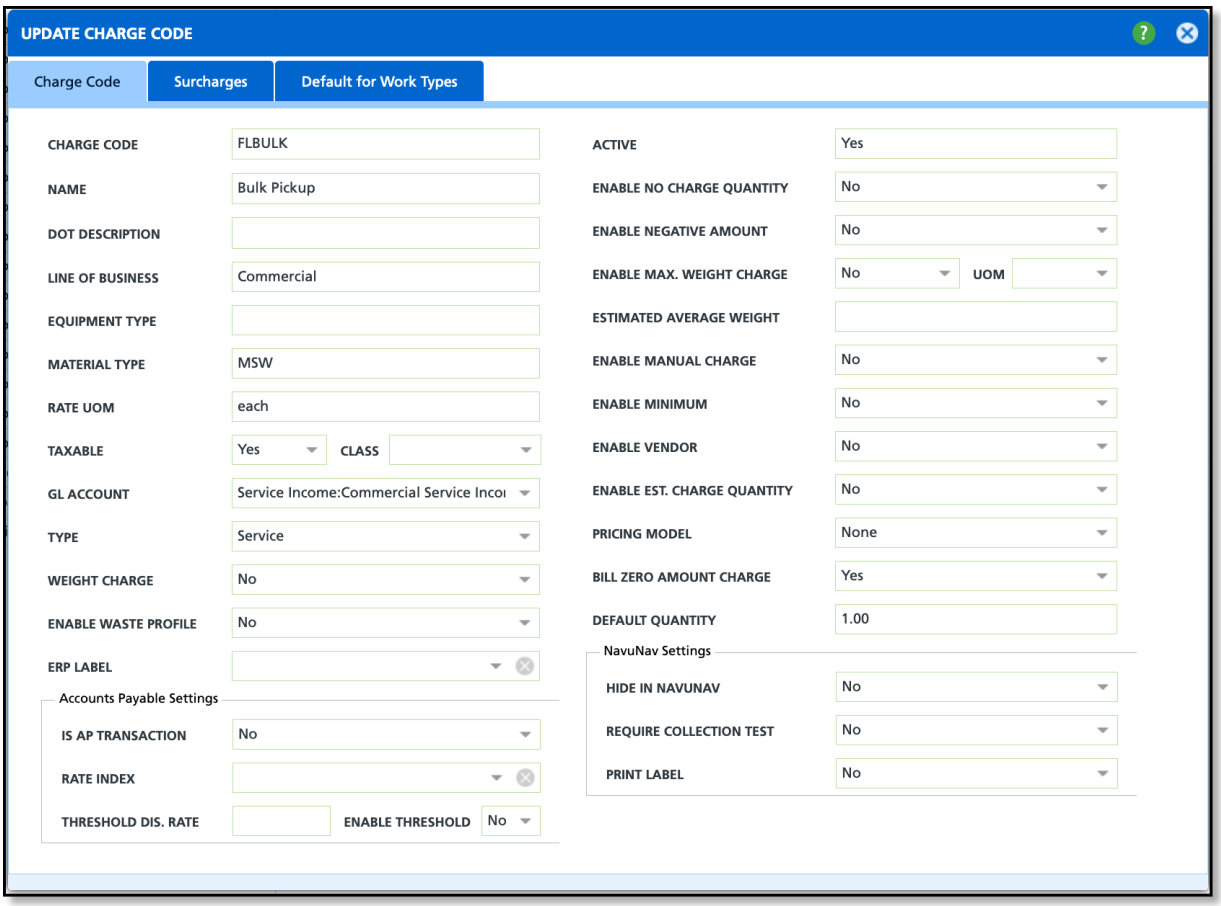
Update Charge Code: Tabsets

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.



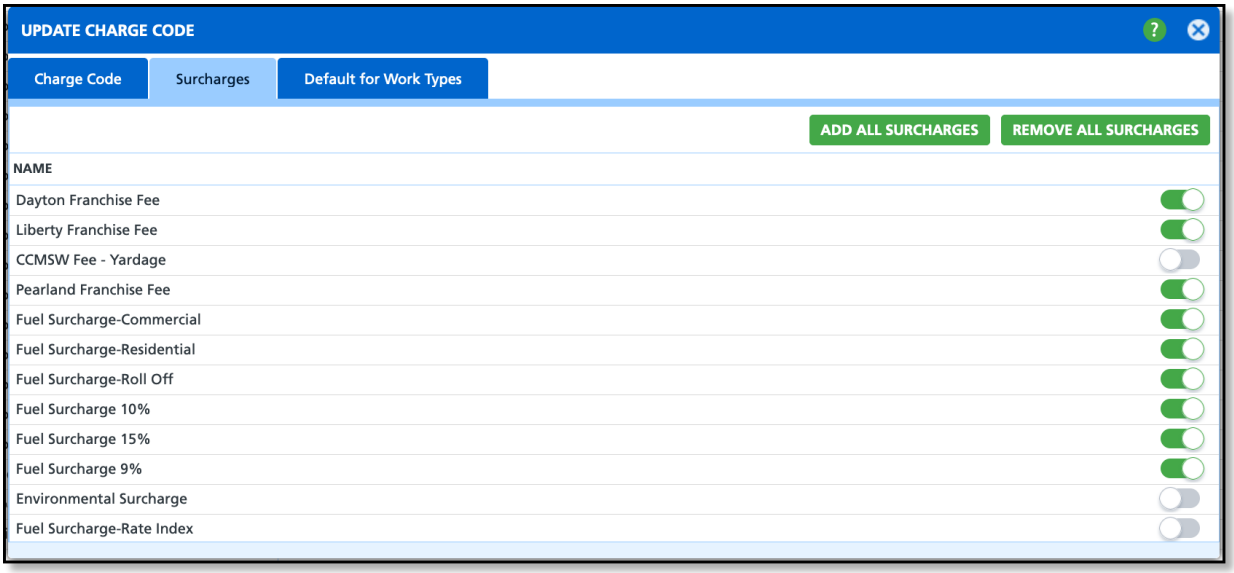
Charge Code

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



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

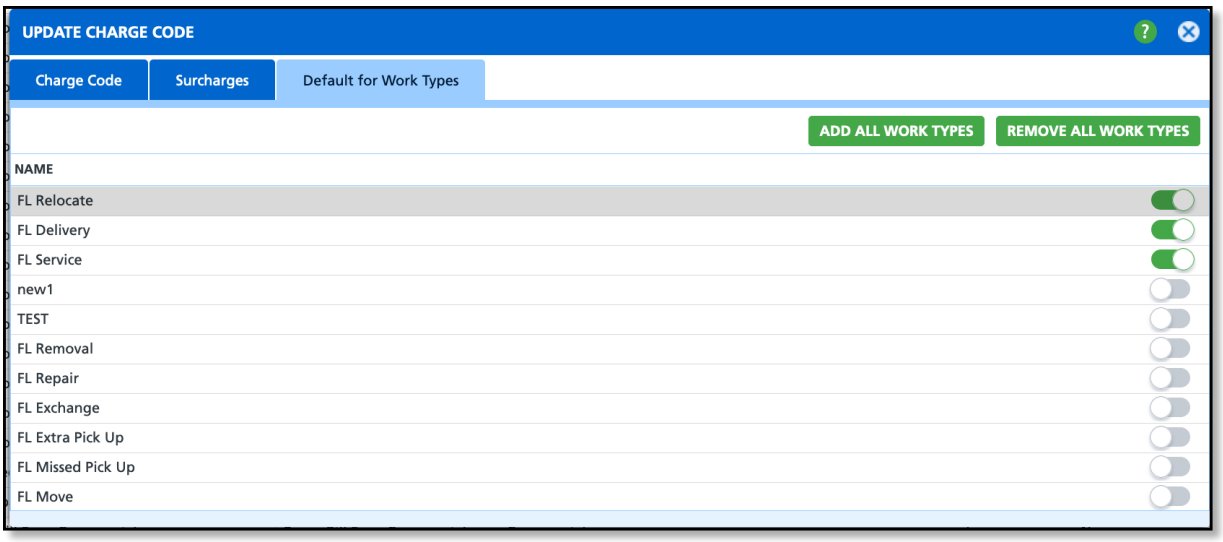
Add Surcharges	Select and all surcharges listed will be added to the charge code. When the charge code is used, the surcharges will be automatically applied.
Remove All Surcharges	Select and all surcharges listed will be removed from the charge code.

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

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