

Generator Type Setup

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Pathway: [Setup](#) > [Account](#) > [Generator Type](#)

Generator Type Setup is used to establish classifications for the different categories of waste producers that a company services.

ID ↑	NAME	GL SEGMENT	REQUIRE EPA ID
0	Not Applicable	12345678901234567892	No
1	Small Quantity Generator		No
2	Large Quantity Generator		Yes
3	Conditionally Exempt		No
4	Public Collection		No
5	PG	COOLPG	No

Field Descriptions

Field	Description
Name	The Name of the waste producer (generator) that a company may serve. Generator types will be displayed for selection.
GL Segment	The GL segment assigned to this generator, if applicable. GL Segmentation can be defined using Generator Type for Unearned Revenue, Revenue, Surcharge, Tax, and Franchise Fee areas. Check out Setup > Accounting > GL Segmentation . for more details and to check the length defined.
Require EPA ID	If the generator type involves medical waste then an EPA ID is required, so this would be set to 'Yes'.

Add a Generator Type

To add a Generator Type, use the following steps. Once created, the Generator Type will be selectable for Account Classes requiring generator type, that is, account classes dealing with Hazardous or Medical Waste.

The screenshot shows the 'ADD GENERATOR TYPE' modal form overlaid on the table. The modal contains the following fields:

- NAME:
- GL SEGMENT:
- REQUIRE EPA ID:
- Save button

1. Click the **green +** icon to open the *Add Generator Type* editor.
2. Enter a descriptive **Name** for the Generator Type.
3. Complete additional fields based on your company's setup requirements.

4. Click **Save** when finished.

Criteria for Using Generator Types

There are **two** conditions that must be met for Generator Type to be displayed in the Add or Edit Account screens.

1. **Account Class Configuration:** In *Setup > Account > Account Class > Details [tab]*, the field '**Require Generator Type**' field must be set to "Yes." This is typically used if the account class deals with Hazardous or Medical Waste.

The screenshot shows the 'UPDATE ACCOUNT CLASS' interface. The 'NAME' field is set to 'MEDICAL'. The 'Require Generator Type' checkbox is checked, highlighted with a red box and an arrow. Other fields include 'ACTIVE' (Yes), 'TYPE' (Business), 'INTERCOMPANY' (No), 'GL ACCOUNT' (Accounts Receivable), 'GL SEGMENT' (12000), 'DEPOSIT GL ACCOUNT', 'DEPOSIT GL SEGMENT', 'DEFAULT ACCOUNT CREDIT LIMIT', 'DEFAULT ACCOUNT TERM', 'DEFAULT REBATE PAYMENT TYPE', 'DEFAULT BILL BY SITE' (No), 'DEFAULT CONTACT LINK TYPE' (Account), and 'DEFAULT CONTACT SERVICE NOTIFICATION' (Yes). On the right side, there are fields for 'GEOCODING TYPE' (Street Side), 'GEOFENCE RADIUS (METERS)' (30), 'NEW ACCOUNT NOTIFICATION TEMPLATE', 'ENABLE LINKING CONTACTS TO ALL SITES' (Yes), 'LOAD ACTIVE ACCOUNTS IN PIPELINE MAP' (Yes), 'EXCLUDE FROM NAVU SALES' (No), 'ENABLE DUPLICATE ACCOUNT AND SITE CHECK' (Yes), 'HIDE RATE ON WORK ORDER FORMAT' (No), 'REQUIRE BILLING CONTACT', and 'REQUIRE SITE CLASS'.

2. An account's **Account Class** must be set to an account class with the *Require Generator Type* field checked as stated in the first criteria. When these two criteria are met, the **Generator Type** field is displayed as shown below.

The screenshot shows the 'CREATE ACCOUNT' interface. The 'ACCOUNT CLASS' dropdown is set to 'MEDICAL'. The 'Generator Type' dropdown is displayed and set to 'Small Quantity Generator', highlighted with a red box and an arrow. Other fields include 'STATUS', 'SOURCE', 'ACCOUNT DIVISION', 'SITE DIVISION', 'Service Address', 'Billing Address', 'CONTACT NAME', 'CONTACT PHONE', 'BILLING CONTACT', 'Billing' (BILL GROUP, INVOICE BY EMAIL, TERM, CREDIT LIMIT), 'SURCHARGE GROUP', 'APPLY FINANCE CHARGES', 'EXCLUDE FROM PAST DUE NOTIFICATION', 'AP', 'DEFAULT PAYMENT METHOD', 'PAYEE', '1099', 'SALES REP', 'SITE CLASS', 'SERVICE REGION', 'TAX REGION', and 'ORIGIN'.

Application of Generator Type

After a Generator Type has been set up, it is selectable and required when adding or editing an account or a site, given the account class is set to an account class that has the Require Generator Type flag checked.

Account

The screenshot shows the 'CREATE ACCOUNT' form with the following fields and values:

- STATUS: [Dropdown]
- SOURCE: [Dropdown]
- ACCOUNT DIVISION: [Dropdown]
- SITE DIVISION: [Dropdown]
- ACCOUNT CLASS: MEDICAL (indicated by a red arrow)
- Service Address: NAME, NAME 2, ADDRESS LINE 1 (Enter a location), ADDRESS LINE 2, CITY/STATE/POSTAL CODE, PHONE ((201) 555-0123), WEBSITE, PO#, EPA, SIGNATURE REQUIRED, VIP
- Billing Address: Same as service address, NAME, NAME 2, ATTN, ADDRESS LINE 1 (Enter a location), ADDRESS LINE 2, CITY/STATE/POSTAL CODE, PHONE ((201) 555-0123)
- CONTACT NAME, TITLE, CONTACT EMAIL, CONTACT PHONE ((201) 555-0123), PHONE TYPE, BILLING CONTACT
- Billing: BILL GROUP, SURCHARGE GROUP, INVOICE BY EMAIL, AUTO STATUS UPDATE , EXCLUDE FROM PAST DUE NOTIFICATION , TERM, APPLY FINANCE CHARGES , CREDIT LIMIT, AP, DEFAULT PAYMENT METHOD (Not Applicable), PAYEE, 1099
- SALES REP, SITE CLASS, GENERATOR TYPE: Small Quantity Generator (indicated by a red arrow), SERVICE REGION, TAX REGION, ORIGIN

Buttons: CREATE ACCOUNT, CLEAR

Site

The screenshot shows the 'ADD SITE' form with the following fields and values:

- NAME, NAME 2, ADDRESS LINE 1 (Enter a location), ADDRESS LINE 2, CITY/STATE/POSTAL CODE, PHONE 1 ((201) 555-0123), PHONE 2 ((201) 555-0123), OLD ID, PO#, SIGNATURE REQUIRED, LEED REPORTABLE, VIP
- DIVISION: Select Division
- SERVICE REGION, TAX REGION, ORIGIN, SOURCE, SALES REP, STATUS, SITE CLASS, GENERATOR: Small Quantity Generator (indicated by a red arrow), EPA, STATE ID, ADDITIONAL SERVICE MINUTES
- NOTE, WARNING ON OPEN, ACCESS INFORMATION, BUSINESS HOURS / SERVICE WINDOW

Buttons: SAVE

Permissions

The following permission(s) are required to access and use Generator Type Setup:

Permission ID	Permission Name
23	Setup \ Account

Related Articles

[Account Class Setup](#)

CREATE ACCOUNT
ACCOUNTS > ADD ACCOUNT

STATUS

SOURCE

ACCOUNT DIVISION

SITE DIVISION

→ ACCOUNT CLASS
 MEDICAL

Service Address

NAME

NAME 2

ADDRESS LINE 1

ADDRESS LINE 2

CITY/STATE/POSTAL CODE

PHONE

WEBSITE

PO#

EPA

SIGNATURE REQUIRED VIP

Billing Address

Same as service address

NAME

NAME 2

ATTN

ADDRESS LINE 1

ADDRESS LINE 2

CITY/STATE/POSTAL CODE

PHONE

CONTACT NAME

TITLE

CONTACT EMAIL

CONTACT PHONE

PHONE TYPE

BILLING CONTACT

Billing

BILL GROUP

INVOICE BY EMAIL

TERM

CREDIT LIMIT

SURCHARGE GROUP

AUTO STATUS UPDATE

APPLY FINANCE CHARGES

EXCLUDE FROM PAST DUE NOTIFICATION

AP

DEFAULT PAYMENT METHOD

PAYEE

1099

SALES REP

SITE CLASS

→ GENERATOR TYPE
 Small Quantity Generator
 Conditionally Exempt
 Large Quantity Generator
 Not Applicable
 PG
 Public Collection
 Small Quantity Generator

SERVICE REGION

TAX REGION

ORIGIN

CREATE ACCOUNT
CLEAR