

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 'GENERATOR TYPE SETUP' window. A red box highlights a green plus icon in the top left corner of the table area. A red arrow points from this icon to the 'ADD GENERATOR TYPE' dialog box. The dialog box contains the following fields:

- NAME**: A text input field with a red border.
- GL SEGMENT**: A text input field with a green border.
- REQUIRE EPA ID**: A dropdown menu currently set to 'No'.
- Save**: A green button at the bottom.

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 a red 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', highlighted with a red box. The 'Generator Type' dropdown is set to 'Small Quantity Generator', also highlighted with a red box and a red arrow. Other fields include 'STATUS', 'SOURCE', 'ACCOUNT DIVISION', 'SITE DIVISION', 'Service Address', 'Billing Address', 'CONTACT NAME', 'CONTACT PHONE', 'BILLING CONTACT' (checked), 'Billing' (BILL GROUP, INVOICE BY EMAIL, TERM, CREDIT LIMIT), 'SURCHARGE GROUP', 'APPLY FINANCE CHARGES' (checked), 'EXCLUDE FROM PAST DUE NOTIFICATION', 'AP', 'DEFAULT PAYMENT METHOD' (Not Applicable), '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 [Dropdown]
- 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](#)
