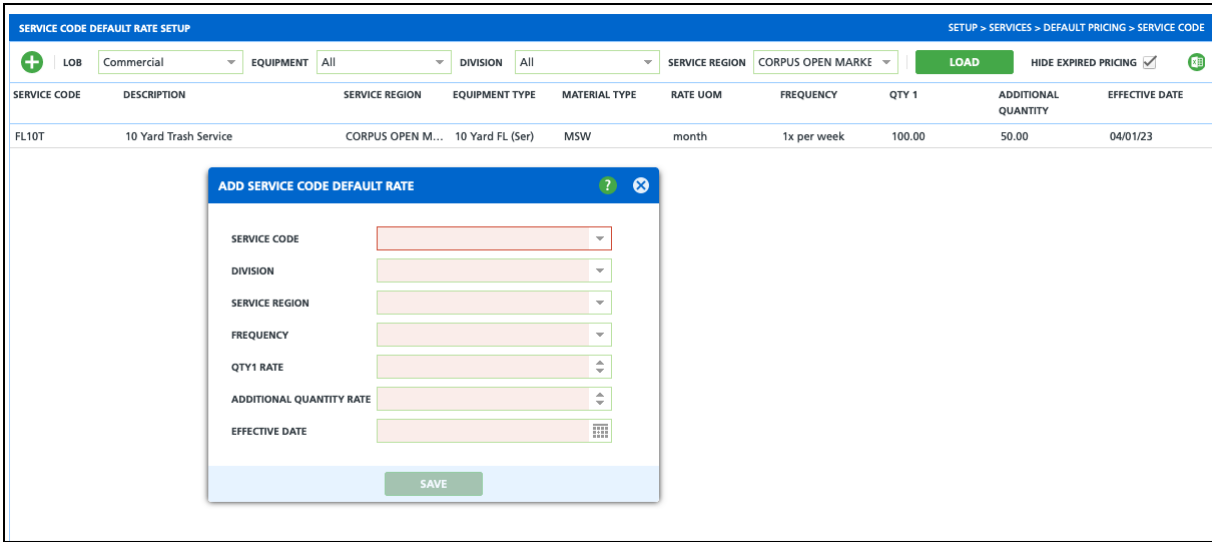


Service Code Default Rate Setup

Last Modified on 09/07/2023 3:10 pm EDT

Pathway: Setup > Services > Default Pricing > Service Code

This article details the process of defining a default rate for a service code. When a default rate is established, the rate is automatically applied when a service is added to a site or proposal that match the Division, Service Region and Frequency identified in the service code's default rate setup.



Add Service Code Default Rate

Follow the steps outlined below to add a default rate to a service code. When the service code is added to a service for a site (of matching division and service region), the default rate will be applied.

1.	Service Code	Select the Service Code the default rate applies to.
2.	Division	Select the Division of the Service Code the default rate applies to.
3.	Service Region	Select the Service Region within the Division the default rate applies to.
4.	Frequency	Select a frequency the service code will include. When the service code is added to the service for a site, the frequency will automatically be applied.
5.	QTY1 Rate	Enter the rate that applies to the service.
6.	Additional Quantity Rate	Enter the additional quantity rate that will be applied for each additional service.
7.	Effective Date	Enter the date the default rate is effective for use.

Apply a Default Rate

Service Code Setup

Pathway: Setup > Services > Service Code

The default rate for a service code is applied with the selection of "None" from the Service Code's Pricing Model field. If a default rate is not available for the service code, a manual can be applied at the time the service is added to a site. By default, the Pricing Model field in Add/Update Service code is set to "None."

The screenshot displays the 'SERVICE CODE SETUP' interface. At the top, there are filters for 'LINE OF BUSINESS' (Roll Off), 'EQUIPMENT TYPE' (All), and 'MATERIAL TYPE' (All). Below this is a table listing various service codes. An 'UPDATE SERVICE CODE' modal window is open, showing details for service code 'RO10T'. The 'PRICING MODEL' field is highlighted in yellow and set to 'None'. Other fields include 'SERVICE CODE', 'NAME', 'LINE OF BUSINESS', 'EQUIPMENT TYPE', 'MATERIAL TYPE', 'UOM', 'TAXABLE', 'GL ACCOUNT', 'PRORATION METHOD', 'BILL WHILE ON CREDIT HOLD', 'IS AP TRANSACTION', 'EST MONTHLY VOL UOM', 'IS SHELL', 'CALCULATE RATE PER YARD', 'ACTIVE', 'ENABLE ROUTING', 'REQUIRE FREQUENCY', 'ENABLE DRIVER UPDATE', 'ENABLE ACCOUNT SIGNATURE', 'ENABLE DRIVER SIGNATURE', 'ENABLE WORK ORDER MINIMUM', 'ENABLE RENTAL FEE', 'ENABLE DEFAULT DESTINATION', 'ENABLE NEGATIVE AMOUNT', 'ENABLE ESTIMATES TRACKING', 'ENBL EQUIPMENT OWNERSHIP', 'ENABLE SHARE', and 'ENABLE VENDOR'. A 'Saved.' message is visible at the bottom right of the modal.

ID	NAME	LINE OF BUSINESS	EQUIPMENT TYPE	MATERIAL TYPE	UOM	IS TAXABLE	TAXABLE CLASS	GL ACCOUNT	PROF ME
RO10T	10 Yard Open Top Service	Roll Off	10 Yard Roll Off		month	Yes		Service Income:...	Calenda
RO15T	15 Yard Open Top Service	Roll Off	15 Yard Roll Off		month	Yes		Service Income:...	Calenda
CP20T	20 Yard Compactor Service	Roll Off	20 Yard Compa...		month	No		Service Income:...	Calenda
RO20T	20 Yard Open Top Service	Roll Off	20 Yard Roll Off		month	No		Service Income:...	Calenda
CP25T	25 Yard Compactor Service	Roll Off	25 Yard Compa...		month	No		Service Income:...	Calenda
RO25T	25 Yard Open Top Service	Roll Off	25 Yard Roll Off		month	No		Service Income:...	Calenda
CP30T	30 Yard Compactor Service	Roll Off	30 Yard Compa...		month	No		Service Income:...	Calenda
RO30T	30 Yard Open Top Service	Roll Off	30 Yard Roll Off		month	No		Service Income:...	Calenda
CP32T	32 Yard Compactor Service	Roll Off	32 Yard Compa...		month	No		Service Income:...	Calenda
CP35T	35 Yard Compactor Service	Roll Off	35 Yard Compa...		month	No		Service Income:...	Calenda
CP40T	40 Yard Compactor Service	Roll Off	40 Yard Compa...		month	No		Service Income:...	Calenda
RO40T	40 Yard Open Top Service	Roll Off	40 Yard Roll Off		month	No		Service Income:...	Calenda
RO40TRASH	40 Yard Open Top Service -	Roll Off	40 Yard Roll Off		month	No		Service Income:...	Calenda
RO40RT	40 Yard Receiver Service	Roll Off	40 Yard Roll Off		month	No		Service Income:...	Calenda
RO42T	42 Receiver Off Service	Roll Off	42 Yard Roll Off		month	No		Service Income:...	Calenda
CP42T	42 Yard Compactor Service	Roll Off	42 Yard Compa...		month	No		Service Income:...	Calenda
ROCOMPRNT	Compactor Monthly Rental	Roll Off	40 Yard Roll Off		month	No		Service Income:...	Calenda
RORENTMON	Roll Off Rental Monthly	Roll Off	40 Yard Roll Off		month	No		Service Income:...	Calenda

Assign to an Active Service

Pathway: Search Account/Site > Add Active Service

When a service is added to a site, upon entry of the Qty and selection of the Service Code and Frequency, the Per Unit and Service Fees fields will auto-populate.

ADD ACTIVE SERVICE

REASON CODE: ADD-New Bus-New Owner START DATE: 08/31/23 Thursday Week 35 (B) 0 per cubic yard (new)

QTY	EQUIPMENT	SERVICE CODE	FREQUENCY	PER UNIT	SERVICE FEES
1	10 Yard FL (Ser)	10 Yard Trash Service	1x per week	75.0000	75.00 month

DISPLAY ALL LINE OF BUSINESS

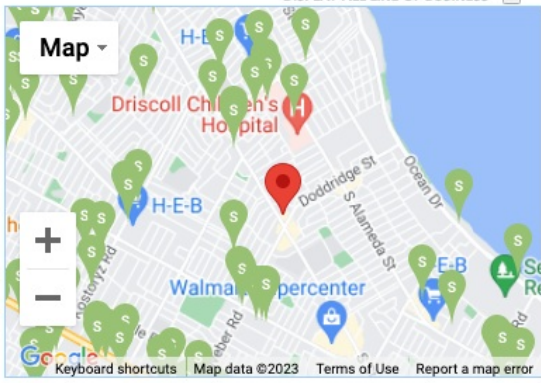
SERVICE DAYS: Mon Tue Wed Thu Fri Sat Sun

REQUESTED BY:

SERVICE NOTES:

FL Delivery ROUTE: DATE: 08/31/23 Thursday

WORK ORDER NOTES:



SERV...	RATE	UOM	NO CHARGE QTY	EST QTY	MINIMUM TYPE	MINIMUM	MAX WEIGHT	OVER MAX WEIGHT RATE	WORK TYPES
Fro...	\$ 0.00	each	0						

Assign to Service Proposal/Contract

Pathway: Search Proposal > Services (tab)

When a service is added to a proposal or contract, upon entry of the Qty and selection of the Service Code and Frequency, the Per Unit and Service Fees fields will auto-populate.

EDIT PROPOSAL - 3816

Settings Services ¹ History ⁵ Attachment Master Agreement

 [Copy Lead](#)

SITE ID	START DATE	QTY	SERVICE CODE	FREQUENCY	RATE	VENDOR RATE
41902001		1	10 Yard Open Top Service	On Call	\$ 85.00	month

Roll Off Delivery: \$ 0.00 each

ADD SERVICE

QTY	EQUIPMENT	SERVICE CODE	FREQUENCY	PER UNIT	SERVICE FEES
1	10 Yard FL (Ser)	10 Yard Trash Service	1x per week	75.0000	75.00 month

DISPLAY ALL LINE OF BUSINESS

SERVICE DAYS: Mon Tue Wed Thu Fri Sat Sun

