

Enable Site Service Recurring Minimum (Setup Process)

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This article details the setup required to include a monthly service minimum for sites. When setup is complete, a *Minimum Per Month* field will display when adding an active service to a site, or adding a service to a proposal.

The screenshot displays the 'ADD ACTIVE SERVICE' interface. At the top, the 'REASON CODE' is 'ADD-New Business' and the 'START DATE' is '10/27/23 Friday'. The service details include: QTY: 1, EQUIPMENT: 10 Yard Roll Off, SERVICE CODE: 10 Yard Open Top Service, FREQUENCY: 1x per week, PER UNIT: 85.0000, and SERVICE FEES: 85.00. A yellow box highlights the 'MINIMUM PER MONTH' field set to 300.00. Below this, there are fields for 'SERVICE DAYS' (with Friday selected), 'REQUESTED BY', and 'SERVICE NOTES'. A map shows the service location. A table titled 'ACTIVE SERVICES (4)' lists: 1 8 Yard Trash Service (304E, 2x per week), 1 Enclosure (1B9B), 1 8 Yard Recycle Service (EESC, 2x per week), and 1 10 Yard Open Top Service (A425, 1x per week). A yellow box highlights 'Recurring Minimum: \$ 300.00 per month' with the reason 'ADD-New Business' and 'Posted By: Aliena Somers on 10/18/2023'. At the bottom, a calendar view shows dates from Oct 1 to Oct 11.

Setup: Line of Business

Pathway: [Setup](#) > [Services](#) > [Line of Business](#)

In the Settings tab of the Add/Update Line of Business screen, choose a charge code from the 'Recurring Minimum Charge Code' field. This code will appear on the invoice when an account is billed for the recurring minimum amount and also determines the visibility of the 'Enable Recurring Minimum' field on the Service Code screen.

LINE OF BUSINESS SETUP

ID	NAME	SCREEN TYPE	ENABLE MANIFEST PROCESSING	GL SEGMENT	WORK ORDER MINIMUM CHARGE CODE	OVER MAX-WEIGHT CHARGE CODE
DODEST	Document Destruction	1	No			
FEL	Commercial					
HAZ	Hazardous Material					
LF	Landfill					
MEDICAL	Medical Waste					
MISC	Miscellaneous					
RESI	Residential					
RO	Roll Off					
SCALE	Scale					

UPDATE LINE OF BUSINESS

LOB ID: RO
 NAME: Roll Off ACTIVE: Yes

Settings | Mobile | Optimization | Self-Service Ordering | Profitability

SCREEN TYPE	1	ENABLE USED OIL COLLECTION	No
GL SEGMENT	D300	ENABLE PROACTIVE ROUTE STATUS DRIVER CHECK	No
UNEARNED REVENUE GL ACCOUNT	Unearned Revenue	ENABLE MANIFEST PROCESSING	No
WORK ORDER MINIMUM CHARGE CODE		ENABLE MANIFEST GROUP WEIGHT ROUNDING	No
OVER MAX WEIGHT CHARGE CODE		ENABLE ACTIVE DISPATCH	Yes
RENTAL CHARGE CODE	Inactivity Fee	ENABLE CHARGE CODE WASTE CODES	No
RECURRING MINIMUM CHARGE CODE	vice Minimum Charge	ENABLE WORK TYPE DEFAULT CHARGE CODES	Yes
LIMIT CHARGE CODE TO MATCHING EQUIPMENT	No	ENABLE BIC REPORTING	No
LIMIT CHARGE CODE TO MATCHING MATERIAL	No	ENABLE LABOR TRACKING	No
INVOICE SUMMARY DESCRIPTION	This is a test. RO LOB Setup		
PRODUCTIVITY UNIT NAME			

Service Frequencies | NavuNav Available Extra Charges

FREQUENCY TYPE: []

TYPE: [] FREQUENCY: [] DESCRIPTION: []

Saved.

Setup: Service Code

Pathway: Setup > Services > Service Code

In the Service Code tab of the Update Service Code screen, set the 'Enable Recurring Minimum' field to "Yes." When enabled, the *Minimum Per Month* field will display on the 'Add Active Service' screen.



This field is visible only when a charge code is selected for the Recurring Minimum Charge Code field in the Line of Business to which the service code belongs.

UPDATE SERVICE CODE

Service Code | Surcharges | Divisions

SERVICE CODE	RO10T	ACTIVE	Yes
NAME	10 Yard Open Top Service	ENABLE ROUTING	Yes
LINE OF BUSINESS	Roll Off	REQUIRE FREQUENCY	Yes
EQUIPMENT TYPE	10 Yard Roll Off	ENABLE DRIVER UPDATE	No
MATERIAL TYPE		ENABLE ACCOUNT SIGNATURE	No
UOM	month	ENABLE DRIVER SIGNATURE	No
TAXABLE	Yes CLASS: []	ENABLE RECURRING MINIMUM	Yes
GL ACCOUNT	Service Income:Roll Off Service In	ENABLE WORK ORDER MINIMUM	No
PRORATION METHOD	Calendar Days - Start and End	ENABLE RENTAL FEE	Yes
BILL WHILE ON CREDIT HOLD	Yes		

