

Reason Code Setup

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Pathway: Setup > System > Reason Code

The Reason Code Setup screen defines the reason codes used across various areas of the product to specify the purpose of an action. For example, reason codes are used to explain the creation of on-call orders, active services (added, updated and ended), invoice adjustments, and more.

REASON CODE SETUP													SETUP > SYSTEM > REASON CODE			
TYPE	LINE OF BUSINESS	REASON CODE	NAME	EXTERNAL ID	SALES RESULTS REPORT TYPE	IS NEW OWNER	IS OLD OWNER	APPLY 1085 RULE	EXCLUDE FROM 1085	EXCLUDE FROM COMMISSION	ENABLE TEMPORARY SERVICE	DISPLAY IN MOBILE	CAPTURE COMPETITOR	GL ACCOUNT	RESULT	ACTIVE
Update Service	123UPDATE		Inactive Update Reason Code		Temp / Sea...	No	No	No	No	No	No	No	No		Temp / Seasonal	No
Update Service	CHG_CORR		CHG-Price/Svc Correction		Temp / Sea...	No	No	No	No	No	No	No	No		Temp / Seasonal	Yes
Update Service	CHG_DECT		CHG-Temp Decrease In Svc		Temp / Sea...	No	No	No	No	No	No	No	No		Temp / Seasonal	Yes
Update Service	CHG_INCT		CHG-Temp Increase In Svc		Temp / Sea...	No	No	No	No	No	Yes	No	No		Temp / Seasonal	Yes
Update Service	CHG_PD		CHG-Price Decrease		Decreased	No	No	No	No	No	No	No	No		Decreased	Yes
Update Service	CHG_PI		CHG-Price Increase		Increase	No	No	No	No	No	No	No	No		Increase	Yes
Update Service	CHG_PM		CHG-Price Match		Decreased	No	No	No	No	No	No	No	No		Decreased	Yes
Update Service	CHG_RB		CHG-PI Roll Back		Decreased	No	No	No	No	No	No	No	No		Decreased	Yes
Update Service	CHG_REN		CHG-Contract Renewal		Increase	No	No	No	No	No	No	No	No		Increase	Yes
Update Service	CHG_SVCDEC		CHG-Service Decrease		Decreased	No	No	No	No	No	No	No	No		Decreased	Yes
Update Service	CHG_SVCINC		CHG-Service Increase		Increase	No	No	No	No	No	No	No	No		Increase	Yes
Update Service	VEN2		CHG VENDOR		Temp / Sea...	No	No	No	No	No	No	No	No		Temp / Seasonal	Yes

Permission(s)

The following permissions are required to add and update a reason code:

Permission ID	Permission Name
120	Setup \ System and Security

Field Descriptions

The following fields are displayed on the Reason Code Setup screen.

Field	Description	Available to the Following Types
Type	Identifies where the reason code will be made available for use.	N/A
Line of Business	Displays the line of business the reason code is available to.	Down Time, No Signature, Service Exception
Reason Code	Displays the reason code ID.	All Types
Name	Displays the name of the reason code.	All Types
External ID	The external ID used to map a reason code from the legacy system to Navusoft.	All Types
Sales Results Report Type	Setting that determines which column tracks new, updated, and ended services in the Sales Results Net New report.	Add Service, Update Service, End Service

Is New Owner	Establishes a link between a service that was ended (Ex: business sold) and a new service that was started for a new account at the same address. Affects how new and existing sites are reported in Sales > Sales Management .	Add Service, Update Service, End Service
Is Old Owner	Establishes a link between a service that was ended (Ex: business sold) and a new service that was started for a new account at the same address. Affects how new and existing sites are reported in Sales > Sales Management .	Add Service, Update Service, End Service
Apply 1085 Rule	If enabled, the service revenue is included in the 1085 calculation in the Sales Results Net New report.	Add Service, Update Service, End Service
Exclude from 1085	If 'No', the service revenue is excluded from the the 1085 calculation in the Sales Results Net New report.	Add Service, Update Service, End Service
Exclude from Commission	Services associated with this reason code will not be eligible for commissions. Sales excluded from commission earnings are tracked in Sales Management.	Add Service, Update Service, End Service
Enable Temporary Service	Controls the display of the Duration field in Add/Edit Active Service. If 'Yes', the Duration field is displayed with drop down options 'Permanent' or 'Temporary.' Additional information about temporary services can be found here: Temporary Services - Setup and Application	Add Service, Update Service
Display in Mobile	Indicates if the reason code will display in the NavuNav driver app.	Down Time, Service Exception
Capture Competitor	If enabled, a 'Competitor' field will display on the Add Active Service screen in Accounts.	Add Service, End Service
Enable Vendor	Configuration setting to display the vendor fields when adding or updating an active service. Note: Vendor fields will only be displayed for a service if enabled in both the reason code and service code.	Add Service, Update Service
GL Account	Displays the name of the GL Account to track revenue streams associated to this reason code. Further information on GL accounts can be reviewed here: GL Account Setup	Cancellation, Invoice Adjustment, Vendor Adjustment
Result	Indicates the result of using the reason code will have.	Add, End, Update Service
Active	Indicates if the reason code is available for use. If a reason code is inactive, the background color will display red.	All Types

Locations of Use

The following table provides the location where each Reason Code type is available for use.

Reason Code Type	Use Location
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Account Request	Customer Service screen > Add Menu > Account Request
Add	Accounts > Add Active Service
Cancellation	Accounts > Cancellation Request (Account Menu drop down)
Cost Avoidance	
Do Not Service	Edit Service Record > Displays if Work Status = Do Not Service
Down Time	Operations > Dispatch (Route Productivity): Add Downtime & Edit Route Record Downtime
End	Accounts > Edit Active Service
Invoice Adjustment	Accounts > AR History > View Details / Adjust Invoice
Label Scanning Exception	Applies to Medical and Hazardous Waste
Lead	Accounts > Lead (Account Menu drop down)
Lost Proposal/Contract	Edit Proposal & Edit Contract > Displays if Status = Lost.
No Signature	
On Call	Accounts > Create On Call Order
Service Exception	Work Orders/Service Records; NavuNav Application
Tank Adjustment	Operations > Tank Inventory > Adjust Tank Inventory
Update	Accounts > Edit Active Service
Vendor Adjustment	
Weight Out Adjustment	Scale

Add a Reason Code

Fields that display in the Add Reason Code popup are contingent upon the selection made from the 'Type' drop down field.

The screenshot displays the 'REASON CODE SETUP' interface. At the top, there is a 'TYPE' dropdown menu set to 'Do Not Service'. Below this is a table with columns: TYPE, LINE OF BUSINESS, REASON CODE, NAME, GL ACCOUNT, DISPLAY IN MOBILE, and RESULT. The table contains several rows, with the first row highlighted in red. A red arrow points from the green '+' icon in the table header to the 'ADD REASON CODE' popup form. The popup form has fields for TYPE (dropdown), ID (text input), NAME (text input), and ACTIVE (dropdown set to 'Yes'), along with a 'SAVE' button.

1. Select the green '+' add icon to display the Add Reason Code popup editor.
2. Select the **Type** from the drop down field. A selection here identifies where the reason code will be available for use.
3. Enter an **ID** specific to the Reason Code.

