

Reason Code Setup

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Pathway: Setup > System > Reason Code

The Reason Code Setup screen includes the reason codes used in different areas of the product to identify the purpose of an action. For instance, reason codes are used for on-call orders to identify why the on call order was created.

REASON CODE SETUP								
SETUP > SYSTEM > REASON CODE								
+ TYPE Update								
TYPE ↑	LINE OF BUSINESS	REASON CODE ↑	NAME	GL ACCOUNT	DISPLAY IN MOBILE	RESULT	EXTERNAL ID	ACTIVE
Update		123UPDATE	Inactive Update Reason Code		No	Temp / Seasonal		No
Update		CHG_CORR	CHG-Price/Svc Correction		No	Temp / Seasonal		Yes
Update		CHG_DECT	CHG-Temp Decrease In Svc		No	Temp / Seasonal		Yes
Update		CHG_INCT	CHG-Temp Increase In Svc		No	Temp / Seasonal		Yes
Update		CHG_PD	CHG-Price Decrease		No	Decreased		Yes
Update		CHG_PI	CHG-Price Increase		No	Increase		Yes
Update		CHG_PM	CHG-Price Match		No	Decreased		Yes
Update		CHG_RB	CHG-PI Roll Back		No	Decreased		Yes
Update		CHG_REN	CHG-Contract Renewal		No	Increase		Yes
Update		CHG_SVCDEC	CHG-Service Decrease		No	Decreased		Yes
Update		CHG_SVCINC	CHG-Service Increase		No	Increase		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 'Type(s)'
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
GL Account	Displays the name of the GL Account the reason code is linked to.	Cancellation, Invoice Adjustment, Vendor Adjustment
Display in Mobile	Indicates if the reason code will display in NavuNav.	Add, Down Time, End, No Signature, Service Exception, Update

Result	Indicates the result of using the reason code will have.	Add, End, Update
External ID	Displays an external ID.	All Types
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 of the Reason Code types are used.

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

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.

REASON CODE SETUP

TYPE: Do Not Service

TYPE ↑	LINE OF BUSINESS	REASON CODE ↑	NAME	GL ACCOUNT	DISPLAY IN MOBILE	RESULT
Do Not Service		123DNS	Inactive Do Not Service			
Do Not Service		SR_CrHold	Credit Hold			
Do Not Service						
Do Not Service						

ADD REASON CODE

TYPE:

ID:

NAME:

ACTIVE: Yes

SAVE

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.
4. Enter a **Name** for the reason code. This is what will display for selection.
5. Select 'Yes' from the **Active** drop down to make the reason code available for use.
6. Complete additional fields based on the requirements for the 'Type' selected.
7. Click **Save** when finished.

Edit Reason Code

After a Reason Code has been created, double click on it to open the Edit Reason Code popup editor to review and apply additional settings.

REASON CODE SETUP SETUP > SYSTEM > REASON CODE

+ TYPE All ↻

TYPE ↑	LINE OF BUSIN...	REASON NAME CODE.↑	EXTER... 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
Add Service	1233...	123444	gg	New	No	No	No	No	No	No	No	No		New	No
Add Service	2	test		Tem...	No	No	No	No	No	Yes	No	Yes		Temp ...	Yes
Add Service	ADD...	ADD-Add Svc...		New	No	No	No	No	No	No	No	No		New	Yes
Add Service	NEW	ADD-New Bus...		New	No	No	No	No	No	No	No	No		New	Yes
Add Service	NE...	ADD-New Bus...		New	No	No	No	No	No	No	No	No		New	Yes
Add Service	NE...	ADD-Change i...		New	Yes	No	No	No	No	No	No	No		New	Yes
Add Service	NE...	ADD-New Bus...		New	No	No	No	No	No	No	No	Yes		New	Yes
Add Service	NE...	ADD-New Bus...		Tem...	No	No	No	No	No	No	No	No		Temp ...	Yes
Add Service	NE...	ADD-New Bus...		New	No	No	No	No	No	No	No	No		New	Yes
Add Service	NE...	New - Tempor...		Tem...	No	No	No	No	No	No	No	No		Temp ...	Yes
Add Service	RBD	ADD-Reinstat...		New	No	No	No	No	No	No	No	No		New	Yes
Add Service	SYST...	ADD-Add Svc...		Tem...	No	No	No	No	No	No	No	No		Temp ...	Yes
Add Service	VEN1	NEW VENDOR		Tem...	No	No	No	No	No	No	No	No		Temp ...	Yes
Update Service	123...	Inactive Upda...		Tem...	No	No	No	No	No	No	No	No		Temp ...	No
Update Service	CHG...	CHG-Price/Svc ...		Tem...	No	No	No	No	No	No	No	No		Temp ...	Yes
Update Service	CHG...	CHG-Temp De...		Tem...	No	No	No	No	No	No	No	No		Temp ...	Yes
Update Service	CHG...	CHG-Temp Inc...		Tem...	No	No	No	No	No	No	No	No		Temp ...	Yes
Update Service	CHG...	CHG-Price Dec...		Decr...	No	No	No	No	No	No	No	No		Decre...	Yes
Update Service	CHG...	CHG-Price Incr...		Incr...	No	No	No	No	No	No	No	No		Increase	Yes
Update Service	CHG...	CHG-Price Ma...		Decr...	No	No	No	No	No	No	No	No		Decre...	Yes
Update Service	CHG...	CHG-PI Roll B...		Decr...	No	No	No	No	No	No	No	No		Decre...	Yes
Update Service	CHG...	CHG-Contract...		Incr...	No	No	No	No	No	No	No	No		Increase	Yes
Update Service	CHG...	CHG-Service D...		Decr...	No	No	No	No	No	No	No	No		Decre...	Yes
Update Service	CHG...	CHG-Service I...		Incr...	No	No	No	No	No	No	No	No		Increase	Yes
Update Service	VEN2	CHG VENDOR		Tem...	No	No	No	No	No	No	No	No		Temp ...	Yes
End Service	123E...	Inactive End R...		Tem...	No	No	No	No	No	No	No	No		Temp ...	No
End Service	END	END-End Service		Non...	No	No	No	No	No	No	No	No		Non-C...	Yes

Double Click

EDIT REASON CODE ? X

TYPE: Add Service

ID: NEW_ACQ

NAME: ADD-New Bus-Acquisition

EXTERNAL ID:

SALES RESULTS REPORT TYPE: New

IS NEW OWNER: No

IS OLD OWNER: No

APPLY 1085 RULE: No

EXCLUDE FROM 1085: No

EXCLUDE FROM COMMISSION: No

ENABLE TEMPORARY SERVICE: No

ENABLE VENDOR: No

CAPTURE COMPETITOR: No

ACTIVE: Yes

Edit Reason Code Field and Descriptions

Field	Description
Type	The type of service this reason code is for.
I.D.	The identification number for the reason code.
Name	The name of the reason code.
External I.D.	The identification number as it appears outside of the system.
Sales Result Report Type	Determines which category the service falls under in the Sales Results Net New report.
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.
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.
Apply 1085 Rule	If enabled, the service revenue is included in the 1085 calculation in the Sales Results Net New report.

Exclude From 1085	If 'No', the service revenue is excluded from the the 1085 calculation in the Sales Results Net New report.
Exclude From Commission	Do not include the service in the calculation for the commission for the account.
Enable Temporary Service	Optional setting that will display a Duration field on an active service with selection options: "Permanent" or "Temporary".
Enable Vendor	Enable a vendor to be set for the service.
Capture Competitor	If enabled, a 'Competitor' field will display on the Add Active Service screen in Accounts.
Active	Enable the reason code to be available for selection.
