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 SETU	REASON CODE SETUP SYSTEM > REASON CODE														ON CODE	
С ТУРЕ	Update Serv	ite Service v														O
туре 🕇	LINE OF BUSINESS	REASON CODE 🕇	NAME	EXTERNAL ID	SALES RESULTS IN REPORT TYPE	S NEW OWNER	IS OLD OWNER	APPLY 1085 RULE	EXCLUDE FROM 1085	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
Туре	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 <i>Sales</i> > <i>Sales</i> <i>Management</i> .	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 <i>Sales</i> > <i>Sales</i> <i>Management</i> .	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 TypeUse Location

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.

REASON CODE SETU	JP										
Туре	Do Not Service	~									
туре 🕇	LINE OF BUSINES	S REASON CODE 🕇	NAME		GL ACCOUNT	DISPLAY IN MOBILE	RESULT				
Do Not Service		123DNS	Inactive Do Not Ser	rvice							
Do Not Service		SR_CrHold	Credit Hold								
Do Not Service											
Do Not Service		ADD REASON CODE			• •						
		ТҮРЕ			-						
		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 change its settings.

REASON CODE SETUP SYSTEM > REASON CODI													ON CODE				
Ð	TYPE	All			~												Q
түре 🕇		LINE OF BUSIN	REASON CODE	NAME	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 Se	rvice		1233	123444	gg	New	No	No	No	No	No	No	No	No		New	No
Add Se	rvice		2	test		Tem	No	No	No	No	No	Yes	No	Yes		Temp	Yes
Add Se	rvice		ADD	ADD-Add Svc		New	No	No	No	No	No	No	No	No		New	Yes
Add Se	rvice		NEW	ADD-New Bus	blo Cli	New	No	No	No	No	No	No	No	No		New	Yes
Add Se	rvice		NE	ADD-New Bus		New	No	No	No	No	No	No	No	No		New	Yes
Add Se	rvice		NE	ADD-Change i		New	Yes	No	No	No	No	No	No	No		New	Yes
Add Se	rvice		NE	ADD-New Bus		1 ew	No	No	No	No	No	No	No	Yes		New	Yes
Add Se	rvice		NE	ADD-New Bus		Tem.		ODE			2		No	No		Temp	Yes
Add Se	rvice		NE	ADD-New Bus		New	EDIT REASON (÷		No	No		New	Yes
Add Se	rvice		NE	New - Tempor		Tem	TVDC		Add Somi	-			No	No		Temp	Yes
Add Se	rvice		RBD	ADD-Reinstat		New	TTPE		Add Servi	ce	*		No	No		New	Yes
Add Se	rvice		SYST	ADD-Add Svc		Tem	ID		NEW_ACC	ç			No	No		Temp	Yes
Add Se	rvice		VEN1	NEW VENDOR		Tem	NAME			Bus-Acquisition			No	No		Temp	Yes
Update	Service		123	Inactive Upda		Tem	NAME		ADD-New	ADD-New Bus-Acquisition			No	No		Temp	No
Update	Service		CHG	CHG-Price/Svc		Tem	EXTERNAL ID						No	No		Temp	Yes
Update	Service		CHG	CHG-Temp De		Tem	CALES DESULTS		New		~		No	No		Temp	Yes
Update	Service		CHG	CHG-Temp Inc		Tem	JALLJ KLJULIJ		New				No	No		Temp	Yes
Update	Service		CHG	CHG-Price Dec		Decr.	IS NEW OWNER		No		~		No	No		Decre	Yes
Update	Service		CHG	CHG-Price Incr		Incr	IS OLD OWNER		No		~		No	No		Increase	Yes
Update	Service		CHG	CHG-Price Ma		Decr.	IS OLD OTHER						No	No		Decre	Yes
Update	Service		CHG	CHG-PI Roll B		Decr.	APPLY 1085 RUL	E	No		Ŧ		No	No		Decre	Yes
Update	Service		CHG	CHG-Contract		Incr	EXCLUDE FROM	1085	No		~		No	No		Increase	Yes
Update	Service		CHG	CHG-Service D		Decr.							No	No		Decre	Yes
Update	Service		CHG	CHG-Service I		Incr	EXCLUDE FROM	COMMISSION	No		Ψ		No	No		Increase	Yes
Update	Service		VEN2	CHG VENDOR		Tem	ENABLE TEMPO	RARY SERVICE	No		~		No	No		Temp	Yes
End Se	rvice		123E	Inactive End R		Tem							No	No		Temp	No
End Sei	rvice		END	END-End Service		Non	ENABLE VENDO	R	No		v		No	No		Non-C	Yes
_							CAPTURE COMP	ETITOR	No		~	Г					
							ACTIVE		Yes		v						