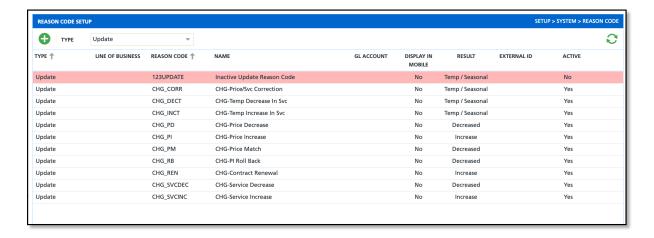
# **Reason Code Setup**

Last Modified on 07/25/2024 2:48 pm EDT

#### 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.



#### 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.

F:-IJ	Description	Available to the Following
Field	Description	'Type(s)'
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
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

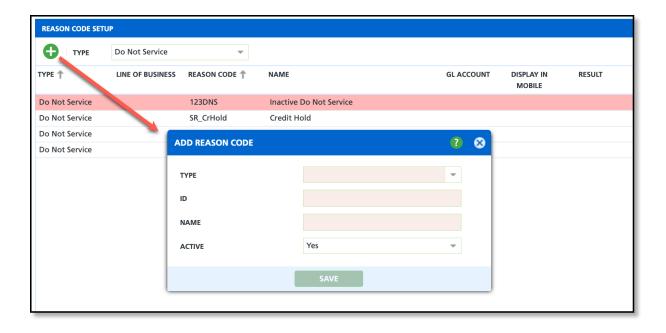
#### **Locations of Use**

The following table provides the location where each of the Reason Code types are used.

Reason Code Type	Use Location
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	Applies to Medical and Hazardous Waste
Exception	Applies to Medical and Mazardous Waste
Lead	Accounts > Lead (Account Menu drop down)
Lost	Edit Proposal & Edit Contract > Displays if Status = Lost.
Proposal/Contract	
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

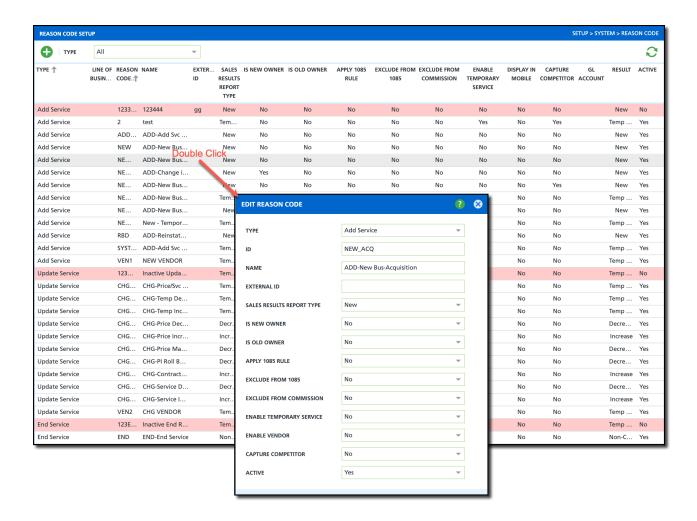
Fields that display in the Add Reason Code popup are contingent upon the selection made from the 'Type' drop down field.



- 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.



#### **Edit Reason Code Field and Descriptions**

Field	Description
Туре	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.