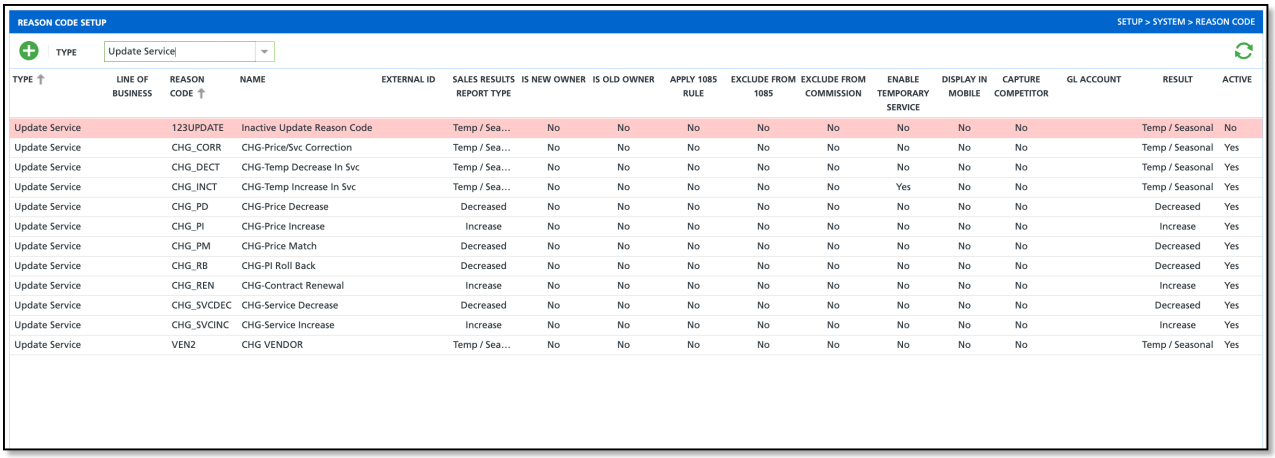
Reason Code Setup

Last Modified on 06/26/2026 2:48 pm PDT

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.



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

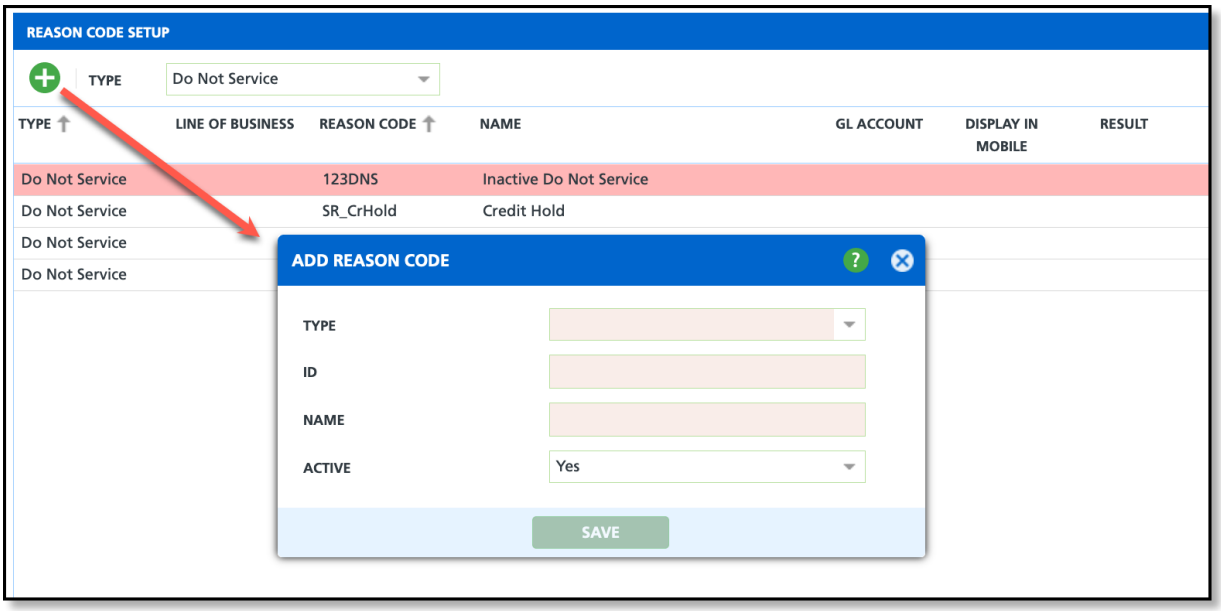
The following table provides the location where each Reason Code type is available for use.

Reason Code Type	Use Location

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.



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.

