

Temporary Services - Setup and Application

Last Modified on 10/24/2024 9:59 am PDT

The primary reason to enable temporary services is to track temporary service revenue. This article explains how to set up and apply temporary services to a site. When adding a service, if the reason code permits temporary services, the **Add Active Service** screen will display a **Duration** field, allowing you to specify whether the service is temporary or permanent. Additionally, if a temporary service is selected and a designated GL account for temporary services is configured, the revenue will be reported under that account.



If tracking revenue for temporary services separately from permanent services is not necessary, **this setup is not required**. These settings are primarily used to track temporary service revenue for billing and general ledger (GL) accounts.

Permission Requirements

The following permissions are required to establish the availability of temporary services, including the creation of a GL account:

Permission ID	Permission Name	Purpose of Permission
22	Setup \ Accounting	Required to create a GL Account for temporary service tracking.
118	Setup \ Services	Required to add/edit Service Codes, Charge Codes, Surcharges and Line of Business.

Temporary Service Setup

This setup is used to establish temporary services specifically for tracking and reporting their associated revenue.

Create a GL Account for Temporary Services

Pathway: *Setup > Accounting > GL Account*

Before proceeding with any other setup, a GL Account to track temporary service revenue must be created. Each subsequent setup step depends on the selection of this temporary GL Account, based on how your company chooses to track and monitor temporary service revenue.

The screenshot displays the 'GL ACCOUNT SETUP' screen. At the top, it shows 'GL ACCOUNT SETUP' on the left and 'SETUP > ACCOUNTING > GL ACCOUNT' on the right. A table lists various GL accounts with columns for ID, NAME, and ACTIVE. A red arrow points to a green plus icon in the top left corner of the table. An 'UPDATE GL ACCOUNT' modal window is open in the center, showing fields for ID (80100), NAME (Temp Services Revenue), and ACTIVE (Yes).

ID ↑	NAME	ACTIVE
10100	BBVA Bank Account - Midco	Yes
10102		Yes
10103		Yes
10104		Yes
10108		Yes
10109		Yes
10110		Yes
10111		Yes
12000		Yes
12100		Yes
20100	Account Payable - Frontier Waste Midco, LLC	Yes
20110	Account Payable - Frontier Waste Holdings, LLC	Yes

Reason Code Setup & Document Type Setup

Reason Code

Pathway: *Setup > System > Reason Code*

Setup here 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.'

REASON CODE SETUP

+ TYPE Add Service

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
Add Service					New	No	No	No	No
Add Service					emp / Seasonal	No	No	No	No
Add Service					New	No	No	No	No
Add Service					New	No	No	No	No
Add Service					New	No	No	No	No
Add Service					New	Yes	No	No	No
Add Service					New	No	No	No	No
Add Service					emp / Seasonal	Yes	No	No	No
Add Service					New	No	No	No	No
Add Service					emp / Seasonal	No	No	No	No
Add Service					New	No	No	No	No
Add Service					emp / Seasonal	No	No	No	No
Add Service					emp / Seasonal	No	No	No	No
Add Service					emp / Seasonal	No	No	No	No
Add Service					emp / Seasonal	No	No	No	No

EDIT REASON CODE

TYPE: Add Service

ID: NEW

NAME: ADD-New Business

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: Yes

ENABLE VENDOR: No

CAPTURE COMPETITOR: Yes

ACTIVE: Yes

Saved.

Document Type

Pathway: Setup > Document Formats > Type

Sales proposals and contracts do not require a reason code when adding a proposed service. Instead, the reason code assigned to the 'Form Type' in *Document Type Setup* determines whether the Duration field is displayed, allowing the service to be marked as either 'Temporary' or 'Permanent'.

DOCUMENT TYPE SETUP

+ FORM TYPE Proposal

ID	NAME	FORM TYPE	REASON CODE	IS RENEWAL TYPE
1	A-New Service	Proposal	ADD-Add Svc - New Service	No
36	Chg Svc-Price Decrease	Proposal	CHG-Price Decrease	Yes
78	Chg Svc-Price Increase	Proposal	CHG-Price Increase	Yes
			Price Decrease	Yes
			Price Increase	Yes
			Change in LOB/Equip	No
			New Bus-Acquisition	No
			New Bus-From Com...	No
			New Bus-New Owner	No
			Temporary	No
			New Business	No
			Instate-Bad Debt...	No
			Contract Renewal	Yes
			Roll Back	Yes
			Size Match	Yes
			Price Decrease In Svc	Yes

ADD SERVICE

SITE: Wild Mountain (Active) 37200 Wild Mountain Rd

QTY: 1 EQUIPMENT: 6 Yard FL SERVICE CODE: 6 Yard Recycle Service FREQUENCY: 1x per week PER UNIT: 85.0000 SERVICE FEES: 85.00 month

DURATION: Temporary

SERVICE DAYS: Mon Tue Wed Thu Fri Sat Sun

Map: St Croix Falls, Wisconsin

Line of Business Setup (Optional)

Pathway: Setup > Services > Line of Business

If a line of business includes temporary service offerings, identifying the **Temporary Service GL Segment** allows for a deeper break down into the specific sources of temporary service revenue.

LINE OF BUSINESS SETUP

ID	NAME	SCREEN TYPE	ENABLE MANIFEST PROCESSING	GL SEGMENT	TEMPORARY SERVICE GL SEGMENT	WORK ORDER MINIMUM CHARGE CODE	OVER MAX-WEIGHT CHARGE CODE	UNEARNED REVENUE GL ACCOUNT
DOCDEST	Document Destruction	1	No	DOC				Unearn
FEL	Comm							
HAZ	Hazar							
INACTIVE	INACT							
LF	Inbou							
MEDICAL	Medic							
MISC	Miscel							
RESI	Reside							
RO	Roll O							
SCALE	Scale							
test	test							
TEST2	TEST L							
UO	Used C							

UPDATE LINE OF BUSINESS

LOB ID: RO
 NAME: Roll Off
 ACTIVE: Yes

Settings | Mobile | Optimization | Self-Service Ordering | Productivity and Profitability

SCREEN TYPE	1	ENABLE USED OIL COLLECTION	No
GL SEGMENT	D300	ENABLE PROACTIVE ROUTE STATUS DRIVER CHECK	No
TEMPORARY SERVICE GL SEGMENT	0078	ENABLE MANIFEST PROCESSING	No
UNEARNED REVENUE GL ACCOUNT	Unearned Revenue	ENABLE MANIFEST GROUP WEIGHT ROUNDING	No
WORK ORDER MINIMUM CHARGE CODE	Minimum Service Charge	ENABLE ACTIVE DISPATCH	Yes
OVER MAX WEIGHT CHARGE CODE		ENABLE CHARGE CODE WASTE CODES	No
RENTAL CHARGE CODE	Inactivity Fee	ENABLE WORK TYPE DEFAULT CHARGE CODES	Yes
RECURRING MINIMUM CHARGE CODE	Roll Off Service Minir	ENABLE BIC REPORTING	No

Service Code Setup

Pathway: Setup > Services > Service Code

For service codes that may be offered as a temporary service, designate a **Temporary Service GL Account** to record the service under.

SERVICE CODE SETUP

LINE OF BUSINESS: Please Select One | EQUIPMENT TYPE: All | MATERIAL TYPE: All | Hide Inactive

ID	NAME	LINE OF BUSINESS	EQUIPMENT TYPE	MATERIAL TYPE	UOM	IS TAXABLE	TAXABLE CLASS	GL ACCOUNT

ADD SERVICE CODE

Service Code

SERVICE CODE		ACTIVE	Yes
NAME		ENABLE ROUTING	No
LINE OF BUSINESS		REQUIRE FREQUENCY	Yes
EQUIPMENT TYPE		ENABLE DRIVER UPDATE	No
MATERIAL TYPE		ENABLE ACCOUNT SIGNATURE	No
UOM		ENABLE DRIVER SIGNATURE	No
TAXABLE	No	ENABLE WORK ORDER MINIMUM	No
GL ACCOUNT		ENABLE RENTAL FEE	No
TEMPORARY SERVICE GL ACCOUNT	Temp Services Revenue	ENABLE DEFAULT DESTINATION	No
PRORATION METHOD	Calendar Days - Start and End	ENABLE NEGATIVE AMOUNT	No
VACATION HOLD PRORATION METHOD	Do Not Prorate	ENABLE ESTIMATES TRACKING	No
		ENABLE EQUIPMENT OWNERSHIP	No

Charge Code Setup

Pathway: Setup > Services > Charge Code

For charge codes that are part of a temporary service, designate a **Temporary Service GL Account** to record additional charges under.

CHARGE CODE SETUP

LINE OF BUSINESS: Please Select One | EQUIP TYPE: All | MATERIAL TYPE: All | Hide Inactive

ID	NAME ↑	DOT DESCRIPTION	LINE OF BUSINESS	EQUIPMENT TYPE	MATERIAL TYPE	RATE UOM	IS TAXABLE
ADD CHARGE CODE							
Charge Code							
CHARGE CODE							ACTIVE: Yes
NAME							ENABLE NO CHARGE QUANTITY: No
DOT DESCRIPTION							ENABLE NEGATIVE AMOUNT: No
LINE OF BUSINESS							ENABLE MAX. WEIGHT CHARGE: No UOM:
EQUIPMENT TYPE							ESTIMATED AVERAGE WEIGHT:
MATERIAL TYPE							ENABLE MANUAL CHARGE: No
RATE UOM							ENABLE MINIMUM: No
TAXABLE	No	CLASS:					ENABLE VENDOR: No
GL ACCOUNT							ENABLE EST. CHARGE QUANTITY: No
TEMPORARY SERVICE GL ACCOUNT	Temp Services Revenue						PRICING MODEL: None
TYPE	Service						BILL ZERO AMOUNT CHARGE: No
WEIGHT CHARGE	No						DEFAULT QUANTITY:

NavuNav Settings

Surcharge Setup

Pathway: Setup > Services > Surcharge

If a temporary service may have surcharges associated to it, designate the **Temporary Service GL Account** they should be recorded under.

SURCHARGE SETUP

ID ↑	NAME	GL ACCOUNT
1004	Da	Franchise Fees Payable
1005	Lib	Franchise Fees Payable
1007	CC	MSW Fees Payable
1008	Pe	Franchise Fees Payable
1009	Fu	Service Income: Fuel Surcharge
1010	Fu	Service Income: Fuel Surcharge
1011	Fu	Service Income: Fuel Surcharge
1012	Fu	Service Income: Fuel Surcharge
1013	Fu	Service Income: Fuel Surcharge
1014	Fu	Service Income: Fuel Surcharge
1015	Fu	Service Income: Fuel Surcharge
1016	En	Service Income: Fuel Surcharge
1017	FL	Accounts Receivable
1018	Per Disposal Ton	Accounts Receivable

ADD SURCHARGE

NAME:

TYPE: Percentage %

GL ACCOUNT:

TEMPORARY SERVICE GL ACCOUNT: Temp Services Revenue

TAXABLE: No

TAX CLASS:

EXCLUDE FROM REVENUE CALCULATION: No

FRANCHISE FEE: No

SAVE

Add a Temporary Service to a Site or Contract

Active Services

Once setup is complete, adding a temporary service to a site becomes straightforward. When a user adds or edits an active service on a site with temporary service enabled (via the reason code), a 'Duration' field appears

on the Add/Edit Active Service screen. To designate the service as temporary, the user selects 'Temporary' from the field, which applies the established accounting and billing rules for temporary services.

ADD ACTIVE SERVICE

REASON CODE: ADD-New Business | COMPETITOR: | START DATE: 09/13/24 Friday | Week 37 (B)

QTY: 1 | EQUIPMENT: 10 Yard Open Top | SERVICE CODE: d Open Top Service - Recycle | FREQUENCY: On Call | PER UNIT: 0.0000 | SERVICE FEES: 0.00 | MINIMUM PER MONTH: month

DURATION: Temporary

RENT FREE DAYS: 0 | DAILY RATE: 0.00

REQUESTED BY: | SERVICE NOTES: | ROUTE: | DATE: 09/13/24 Friday

RO Delivery | WORK ORDER NOTES: | DEFAULT DESTINATION: |

SERVICE CHARGES	RATE	UOM	NO CHARGE QTY	EST QTY	MINIMUM TYPE	MINIMUM	MAX WEIGHT	OVER MAX WEIGHT RATE	WORK TYPES

SAVE

Contracts/Proposals

If the Document Type for a contract or proposal has a reason code that allows temporary services, the Duration field will automatically display when the service is added.

EDIT PROPOSAL - 4041

ACCOUNT 49121 / Wild Mountain

DOCUMENT FORMAT: Proposal | DOCUMENT TYPE: A-New Service | STATUS: Open | SOURCE: []

SALES REP: Aliena Somers - Admin | SOLD BY: [] | FORM CONTACT: [] | Linked Leads (0)

ADD SERVICE

SITE: []

EFFECTIVE DATE: 09/19/2024 | DEL: 09

QTY: [] | EQUIPMENT: Choose one | SERVICE CODE: [] | FREQUENCY: [] | PER UNIT: 0.0000 | SERVICE FEES: 0.00

TERM: 48 Months | DURATION: []

PRINT EST. SURCHARGE: No

NOTE: []

DELIVERY INSTRUCTION: []

PAYMENT REQUIRED AT C: Not Required

CUSTOM FIELD1 TEXT: []

SAVE

Change a Temporary Service to a Permanent Service



The billing process uses the duration assigned at the time of billing.

To update a temporary service to a permanent one, follow these simple steps:

1. In the Active Services section, click the 3-dot icon to open the 'Service Additional Fields' editor.
2. From the 'Duration' drop down, select 'Permanent.'
3. Click 'Save' to apply the changes.

***Note:** If the service includes additional changes, such as increased frequency, and not just a shift from temporary to permanent, right-click on the service and select 'Edit' to capture all necessary updates.

49121 Wild Mountain

37200 Wild Mountain Rd
Taylors Falls, MN 55084
US

TERMS: Due upon receipt
INVOICE DELIVERY: Email with Link

Active

DIVISION: QAWASTE
ACCOUNT MGR: Aliena Somers - Admin-NS (Admin)
CLASS: INVFEF
BILL GROUP: QA Billing Cycle

ADVANCE - MONTHLY Billed Thru Date Jul 31, 2024

CURRENT	1-30	31-60	61-90	91-120	120+	TOTAL
-300.00	300.00	0.00	0.00	0.00	0.00	0.00

Auto Pay Not Enabled

49121001 Wild Mountain

37200 Wild Mountain Rd
Taylors Falls, MN 55084
Chisago County
US

Active

DIVISION: QAWASTE
SERVICE REGION: QA Waste OPEN MARKET
SALES REP: Aliena Somers - Admin-NS (Admin)
SOURCE: Call In
GENERATOR: Not Applicable

TAX REGION: <Not Set>
TAX EXEMPT: No
LEED REPORTABLE: No

HIGHLIGHTS

PENDING

- 9337 Follow Up Aliena Somers - Admin... 08/23/2024
- 4007 Proposal Aliena Somers - Admin... 08/20/2024
- 1030 Price Emilio Natarén - Admi... 09/27/2024

ACTIVE SERVICES (2) Notes TOTAL RECURRING \$ 70.00

QTY	SERVICE CODE	SERVICE ID	FREQUENCY	SCHEDULE	ACCOUNT	RATE	NOTES
2	2 Yard Recycle Service	EF73	1x per week	F	Wild Mountain 37200 Wild Mountain Rd	\$ 70.00 per month	
1	10 Yard Open Top Service - Recycle (Temporary)	9CBA	1x per week		Wild Mountain	\$ 0.00 per month	

CALENDAR September, 2024 **EVENTS**

SUN	MON	TUE	WED	THUR	FRI	SAT
Sep 1	Sep 2					Sep 7
Sep 8	Sep 9					Sep 14

SERVICE ADDITIONAL FIELDS

REASON CODE: ADD-New Business

DURATION: Temporary (selected), Permanent

PO NUMBER: Temporary

BLANKET PO: [Empty]

DESTINATION/ORIGIN: [Empty]

SERVICE NOTES

START DATE	END DATE	NOTE

SAVE

GL Transaction Processing

Pathway: Accounting > GL Transaction Processing

In the GL Transaction Processing screen, track and review all GL accounts, including those specific to temporary services. The GL segment for each account is displayed under the GL Account column, with segmentation formatting defined in **Setup > Accounting > GL Segmentation**. Further information on the GL Transaction Processing screen can be found here: [Create a GL Batch - GL Transaction Processing](#).

GL TRANSACTION PROCESSING

AR PERIOD: Sep 2024 **LOAD**

Pending | In Progress **22** | Posted | Summary

TYPE: All Setup Errors (9)

TYPE	REFERENCE #	AR PERIOD	DATE	COUNT	ERRORS	AMOUNT	DIVISIONS
TOTALS	5			115	0	\$ 6,524.38	
Billing Batch	25911	2024-09	09/12/2024	2		\$ 1,108.63	DAYTON
Billing Batch	25912	2024-09	09/12/2024	105		\$ 4,620.11	DAYTON
Billing Batch	25913	2024-09	09/30/2024	6		\$ 494.64	QAWASTE
Credit Card / eChec...	11404						
Credit Card / eChec...	11406						

GL PROCESSING - PENDING - BILLING BATCH - 25913

GL ACCOUNT	DIVISION	PERIOD	COUNT	ERRORS	DEBIT AMOUNT	CREDIT AMOUNT
00000-QA12-C100-SV	QAWASTE	2024-09	1		0.00	102.37
12000-QA12-D100-SV	QAWASTE	2024-09	2		0.00	329.00
24060-QA12	QAWASTE	2024-09	2		0.00	7.28
SEG12-QA12-QA1230	QAWASTE	2024-09	6		494.64	0.00
TEMPR-QA12-C100-SV	QAWASTE	2024-09	1		0.00	55.99

