

Account Screen Overview

Last Modified on 01/11/2024 7:09 pm EST

Pathway: Accounts > Search (Account) > Customer Service Screen

The screenshot displays the Navusoft Customer Service Screen for account 41898. It is divided into several sections:

- Account Details:** Shows account information for "Navusoft Premier Waste And Recycling" at 8100 Washington Ave, Houston, TX 77007-1062. It includes fields for Division (DAYTON), Account Mgr (House Acct non System), Class (COMMERCIAL), and Bill Group (DAY-BAD DEBT \ INACTIVE). It also shows "Arrears - Monthly Billed Thru Date Dec 19, 2023".
- Site Details:** Shows information for "Navusoft - Demo" at Post Oak Blvd, Houston, TX 77057, Harris County, US. It includes Division (CORPUS), Service Region (CORPUS OPEN MARKET), Sales Rep (House Acct non System), and Source (Cold Call).
- Summary Table:**

CURRENT	1-30	31-60	61-90	91-120	120+	TOTAL
84.92	0.00	0.00	649.95	0.00	222.00	956.87
- HIGHLIGHTS:** A red warning icon indicates "Account is significantly past due".
- PENDING:** Shows a pending customer request for "1511 Customer Request" on 07/05/2023 at 11:06 am.
- ACTIVE SERVICES (3):** A table listing services:

QTY	SERVICE CODE	SERVICE ID	FREQUENCY	SCHEDULE	RATE	START DATE	END DATE	CONTRACT EXP.	WO MIN.
1	30 Yard Compactor Service	801A	On Call		\$ 0.00 per month	04/01/23			
1	2 Yard Trash Service	E52C	1x per week	M	\$ 125.55 per month	10/01/23			
1	30 Yard Open Top Service	7D8D	On Call		\$ 0.00 per month	10/18/23			
- CALENDAR:** A calendar view for January 2024 showing events for "AR, Service Records, Rental Fee, Service Chan". Events are listed for Jan 4 (Isabel Navarro, Matthew Van Doren) and Jan 10 (Isabel Navarro).

Permissions

Permission ID	Permission Name
5	View Account
6	View Site
41	View AR History
59	Search

Account Details Section

The left side of the customer service screen displays account-related information. To edit an account's information, right-click anywhere within this section.

This close-up view shows the "Account Details" section for account 41898. It includes:

- Account Information:** Address (8100 Washington Ave, Houston, TX 77007-1062), Division (DAYTON), Account Mgr (House Acct non System), Class (COMMERCIAL), and Bill Group (DAY-BAD DEBT \ INACTIVE).
- Financials:** "Arrears - Monthly Billed Thru Date Dec 19, 2023" and "Next Invoice Date".
- Invoice Settings:** "INVOICE BY EMAIL" (No), "TERMS" (Net 20), and "SOURCE" (Cold Call).
- Other Details:** "REBATE PAYMENT TYPE" (Not Applicable), "ACCESS Gate Code 1234", and "NOTE Site Notes".
- Site Information:** "Navusoft - Demo" at Post Oak Blvd, Houston, TX 77057, Harris County, US, with phone number +1 626-777-7777.
- Service Region:** "CORPUS OPEN MARKET" and "House Acct non System".
- Generator:** "Not Applicable".
- Tax Information:** "TAX REGION" (CC CITY-NUECES COU-CC MTA-CC), "TAX EXEMPT" (No), and "LEED REPORTABLE" (No).

View Account Status History

The account's status is shown in the Account Details section of the customer service screen. Clicking on the status displayed will open a read-only 'Account Status History' popup window. To update the account's status, right-click within the Account Details section and select 'Edit.' For additional information on account status changes, please refer to the related article linked below.

Related Articles: [Account Status Changes](#)

ACCOUNT STATUS	EFFECTIVE DATE	UPDATED BY	NOTE
Active	May 3, 2021	Matthew Van Doren Updated On: May 3, 2021 7:07 am	
Credit Hold	Apr 16, 2023	Updated On: Apr 16, 2023 11:00 pm	Automated Credit Hold - 122.00 past due amount
Active	Apr 21, 2023	Matthew Van Doren Updated On: Apr 21, 2023 5:18 am	

Edit Account

To access the 'Edit Account' popup editor and make changes to the account's setup, right-click within the Account Details section and choose the "Edit" option. Edits are posted upon save.

Related Articles: [Edit Account and Site Information](#)



Edit functionality is guarded by permissions. **Permission 68: Edit Non-Prospect Account is required.**

41898001 Navusoft - Demo

1 of 2 Post Oak Blvd
Houston, TX 77057
Harris County
US
+1 626-777-7777

ACCESS Gate Code 1234

NOTE Site Notes

Right Click

Edit
 View

Active

DIVISION CORPUS
SERVICE REGION CORPUS OPEN MARKET
SALES REP House Acct non System
SOURCE Cold Call
GENERATOR Not Applicable
TAX REGION [CC CITY-NUECES COU-CC MTA-CC CRIME CON](#)
TAX EXEMPT No
LEED REPORTABLE No

EDIT ACCOUNT

Account Settings

NAME	Navusoft Premier Waste And Recycling	STATUS	Active
NAME 2		DIVISION	DAYTON
ADDRESS LINE 1	8100 Washington Ave	SOURCE	Cold Call
ADDRESS LINE 2		ACCOUNT MANAGER	House Acct non System
CITY/STATE/POSTAL CODE	Houston TX 77007-1	ACCOUNT CLASS	COMMERCIAL
PHONE	(207) 555-5555	AUDITOR	
ATTN		WEBSITE	
BILLING PHONE	(999) 999-9999	LOGO	Select logo... BROWSE...
FAX	(999) 999-9999	OLD ID	
BILLING CONTACT 1	Matthew		
BILLING CONTACT 2			
PARENT ACCOUNT			

SAVE

Add Account Contacts

Add and remove contacts and control which site locations they should be granted portal access to using the View Contacts tool. A red bubble indicates the total count of contacts associated with an account.

Related Articles: [Add and Edit Account Contacts](#)

41898 | Navusoft Premier Waste And Recycling

8100 Washington Ave
Houston, TX 77007-1062

3

2


Active


DIVISION DAYTON
ACCOUNT MGR House Acct non System
CLASS COMMERCIAL
BILL GROUP DAY-BAD DEBT \ INACTIVE
Arrears - Monthly Billed Thru Date Dec 19, 2023
Next Invoice Date
INVOICE BY EMAIL No
TERMS Net 20
SOURCE Cold Call
REBATE PAYMENT TYPE Not Applicable


Add Photos, Attachments, Blanket Purchase Orders and Waste Profiles

Add and remove photos and attachments for all site locations under an account using the Attachments tool. Users have the option to display uploaded attachments in the Portal for portal users to see. A red bubble indicates the total count of photos, attachments, blanket purchase orders and waste profiles that have been added to the account.

Related Articles: [Add Photos and Attachments](#); [Add a Blanket Purchase Order](#)

 41898 | **Navusoft Premier Waste And Recycling**

 50 8100 Washington Ave
Houston, TX 77007-1062

 3

 2

 0


 0


Active


DIVISION	DAYTON
ACCOUNT MGR	House Acct non System
CLASS	COMMERCIAL
BILL GROUP	DAY-BAD DEBT \ INACTIVE
Arrears - Monthly	Billed Thru Date Dec 19, 2023
Next Invoice Date	
INVOICE BY EMAIL	No
TERMS	Net 20
SOURCE	Cold Call
REBATE PAYMENT TYPE	Not Applicable

Customer Analysis and Reports


View the account related Analysis and Reports for the customers details and services. Users can select the different reports to view the data for Revenue By Period, LEED Details, and Work Order Weights.

 41898 | **Navusoft Premier Waste And Recycling**

 50 8100 Washington Ave
Houston, TX 77007-1062

 3

 2

 0

 0

Active

DIVISION	DAYTON
ACCOUNT MGR	House Acct non System
CLASS	COMMERCIAL
BILL GROUP	DAY-BAD DEBT \ INACTIVE
Arrears - Monthly	Billed Thru Date Dec 19, 2023
Next Invoice Date	
INVOICE BY EMAIL	No
TERMS	Net 20
SOURCE	Cold Call
REBATE PAYMENT TYPE	Not Applicable

View Audit Timeline

View the account related Analysis and Reports for the customers details and services. Users can select the different reports to view the data for Revenue By Period, LEED Details, and Work Order Weights.

Site Details Section

The right side of the customer service screen displays information related to the site location being viewed. Right-click within this section to edit only the site's information.

CURRENT	1-30	31-60	61-90	91-120	120+	TOTAL
84.92	0.00	0.00	649.95	0.00	222.00	956.87

View Site Status History

The status of a site displays in the Site Details section and will vary dependent on the sites's current standing. Selecting the current status that is displayed will open the 'Site Status History' editor. Additional information related to updating the status of a site can be accessed from the related articles link below.

Related Articles: Site Status Changes

SITE ID	NAME	STATUS	OLD ID	ADDRESS	SITE CLASS	SALES REP	DIVISION
41898001	Navusoft - Demo	Active 939 Day(s)		Post Oak Blvd Houston, TX 770... Harris County		House Acct non System	CORPUS
41898002	Navusoft - Dem...	Inactive 977 Day(s)		3017 N Durham Dr Houston, TX 770... Harris County		House Account	DAYTON

Edit Site

Right click within the Site Details section to display the Edit option. Select 'Edit' to open the 'Edit Account' popup editor to make modifications to the account's current setup. Edits will be posted upon save.

Related Articles: Edit Account and Site Information

Edit functionality is guarded by permissions. **Permission 69: 'Edit Non-Prospect Site' is required.**

The screenshot shows a user interface for managing sites. At the top, there is a list of sites. One site is highlighted with a red box around the 'Edit' button. Below this, the 'EDIT SITE' form is displayed, showing various fields for site information.

EDIT SITE

Basic Settings | Billing Settings | BIC Profile | Required Capabilities

TOTAL RECURRING \$ 125.5
RATE START

NAME: Navusoft - Demo
NAME 2:
ADDRESS LINE 1: 777 Alameda St
ADDRESS LINE 2:
CITY/STATE/POSTAL CODE: Los Angeles CA 90021-1
PHONE 1: (626) 777-7777 Office
PHONE 2: (999) 999-9999
OLD ID:
PO#:
SIGNATURE REQUIRED: LEED REPORTABLE:
NOTE:
WARNING ON OPEN: Site warning
ACCESS INFORMATION:
BUSINESS HOURS / SERVICE WINDOW:
SAVE

Fields on the right side of the form include: DIVISION (CORPUS), SERVICE REGION (CORPUS OPEN MARKET), TAX REGION (CC CITY-NUECES COU-CC MTA-CC), ORIGIN, SOURCE (Cold Call), SALES REP (House Acct non System), SITE CLASS, GENERATOR (Not Applicable), EPA, STATE ID, and ADDITIONAL SERVICE MINUTES.

Change Between Sites

Select to open a list of all the sites belonging to the account. From the populated list that displays, select the site you would like to open and the screen will update to the selected site.

Related Articles: [Navigate Between Sites and Add a New Site](#)

The screenshot shows a list of sites. The first site is highlighted with a red box around the '1 of 2' indicator. The site details are as follows:

41898001 | Navusoft - Demo

1 of 2 | Post Oak Blvd
Houston, TX 77057
Harris County
US
+1 626-777-7777

ACCESS Gate Code 1234
NOTE Site Notes

Active

DIVISION CORPUS
SERVICE REGION CORPUS OPEN MARKET
SALES REP House Acct non System
SOURCE Cold Call
GENERATOR Not Applicable
TAX REGION CC CITY-NUECES COU-CC MTA-CC
TAX EXEMPT No
LEED REPORTABLE No

Geocode Service Location

Use the Geocode Service Location tool to direct a driver to the specific servicing location at a site. This tool includes an interactive map to create and place a unique pin over the spot the driver should go to service the site. Users might find this tool helpful if a site has multiple active services that are not all on the same servicing schedule.

Example: A site has multiple service locations (at the same address) and not all locations follow the same servicing schedule, create a unique pin for each location so the driver knows where to service.

41898001 | Navusoft - Demo ↻

1 of 2

✓ Post Oak Blvd
Houston, TX 77057
Harris County
US
+1 626-777-7777

ACCESS Gate Code 1234

NOTE Site Notes

Active

DIVISION	CORPUS
SERVICE REGION	CORPUS OPEN MARKET
SALES REP	House Acct non System
SOURCE	Cold Call
GENERATOR	Not Applicable
TAX REGION	CC CITY-NUECES COU-CC MTA-CC
TAX EXEMPT	No
LEED REPORTABLE	No

Display Web Search Results

Select to view all google related results when searching the Site Location. Clicking the icon will redirect to a google web search within your browser in a separate window.

41898001 | Navusoft - Demo ↻

1 of 2

✓ Post Oak Blvd
Houston, TX 77057
Harris County
US
+1 626-777-7777

ACCESS Gate Code 1234

NOTE Site Notes

Active

DIVISION	CORPUS
SERVICE REGION	CORPUS OPEN MARKET
SALES REP	House Acct non System
SOURCE	Cold Call
GENERATOR	Not Applicable
TAX REGION	CC CITY-NUECES COU-CC MTA-CC
TAX EXEMPT	No
LEED REPORTABLE	No

Display Inventory Equipment and Trucks

Site Inventory keeps track of the equipment and trucks used at a site. Users can use this feature to document equipment additions, removals, and transfers to other sites or a storage yard.

Related Articles:

[Site Inventory \(Equipment\)](#)

[Site Inventory \(Trucks\)](#)

[Inventory Management](#)

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1 of 2 Post Oak Blvd Active
Houston, TX 77057
Harris County
US
+1 626-777-7777

	DIVISION	CORPUS
	SERVICE REGION	CORPUS OPEN MARKET
	SALES REP	House Acct non System
	SOURCE	Cold Call
ACCESS Gate Code 1234	GENERATOR	Not Applicable
NOTE Site Notes	TAX REGION	<u>CC CITY-NUECES COU-CC MTA-CC</u>
	TAX EXEMPT	No
	LEED REPORTABLE	No

View Additional Information (Access Information, Notes)

By default, some site details are hidden when viewing the screen. To see additional details such as the Access Code or Notes for the site, click anywhere within the site's details section to display additional information.

41898001 | Navusoft - Demo

1 of 2 Post Oak Blvd Active
Houston, TX 77057
Harris County
US
+1 626-777-7777

Click to show Site Details

41898001 | Navusoft - Demo


1 of 2 Post Oak Blvd Active
Houston, TX 77057
Harris County
US
+1 626-777-7777

	DIVISION	CORPUS
	SERVICE REGION	CORPUS OPEN MARKET
	SALES REP	House Acct non System
	SOURCE	Cold Call
ACCESS Gate Code 1234	GENERATOR	Not Applicable
NOTE Site Notes	TAX REGION	<u>CC CITY-NUECES COU-CC MTA-CC</u>
	TAX EXEMPT	No
	LEED REPORTABLE	No

AR History

The AR History tool in the customer service screen displays aging buckets that categorize an account's outstanding balances by time period. The Current bucket reflects recently billed invoices where the date payment is due is still in the future.

Select the green arrow icon to open the AR History for the account to print a statement, generate an invoice, and update the credit card or bank account information on file.






CURRENT	1-30	31-60	61-90	91-120	120+	TOTAL
84.92	0.00	0.00	649.95	0.00	222.00	956.87 

Related Articles (AR History):

- [AR History Overview](#)
- [Reverse/Transfer/Split Payments](#)
- [Generate Single Invoice](#)
- [View Details/Adjust Invoice](#)
- [AR History Account Transactions](#)
- [Void, Refund and Payment Chargebacks](#)






Highlights/Pending

Important account information such as past due invoice payments display in the **Highlights** section and are specific to the site being viewed. The **Pending** section displays actionable items that may affect the servicing or billing of an account.

HIGHLIGHTS		PENDING							
 Account is significantly past due		 1511 Customer Request House Acct non ... 07/05/2023 11:06 am test							
ACTIVE SERVICES (3) Standard		TOTAL RECURRING \$ 125.55							
QTY	SERVICE CODE	SERVICE ID	FREQUENCY	SCHEDULE	RATE	START DATE	END DATE	CONTRACT EXP.	WO MIN.
1	30 Yard Compactor Service	801A	On Call		\$ 0.00 per month	04/01/23			
1	2 Yard Trash Service	E52C	1x per week	M	\$ 125.55 per month	10/01/23			
1	30 Yard Open Top Service	7D8D	On Call		\$ 0.00 per month	10/18/23			

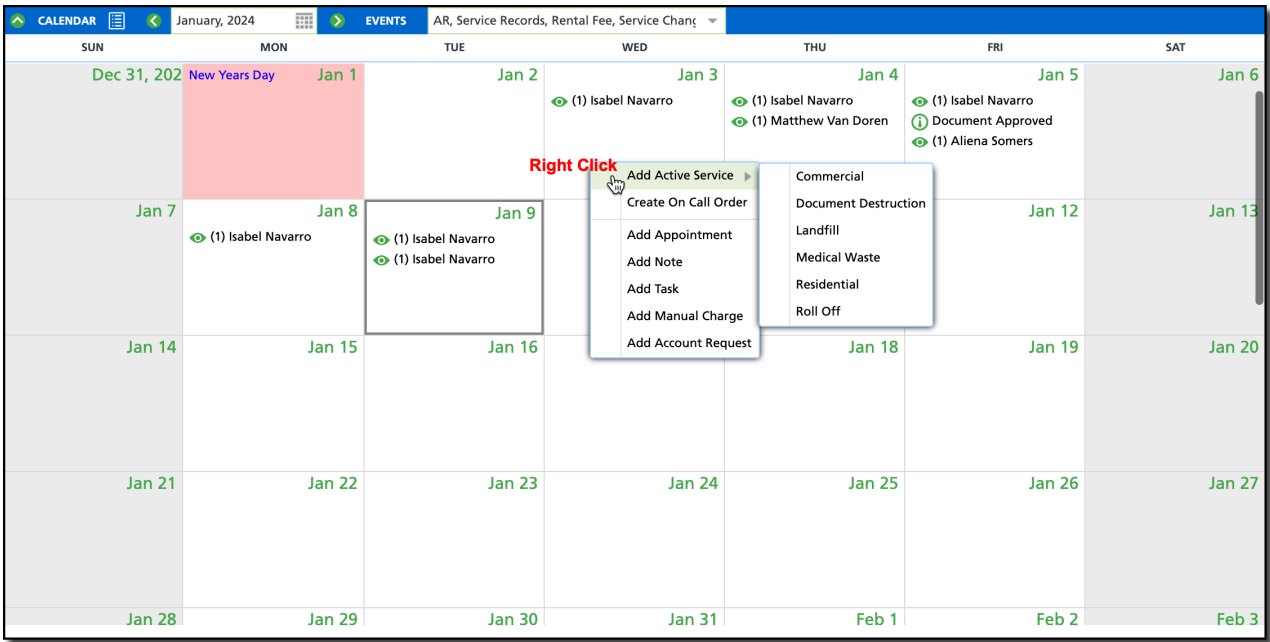
Active Services

From the Active Services section, view the servicing details for: current, upcoming and ending services by selecting the expand option for the service. In addition users can: add new services, edit existing services, view the rate history, access additional features by right-clicking on the desired active service and add a service note by selecting the green dot icon.

HIGHLIGHTS		PENDING							
 Account is significantly past due		 1511 Customer Request House Acct non ... 07/05/2023 11:06 am test							
ACTIVE SERVICES (3) Standard		TOTAL RECURRING \$ 125.55							
QTY	SERVICE CODE	SERVICE ID	FREQUENCY	SCHEDULE	RATE	START DATE	END DATE	CONTRACT EXP.	WO MIN.
1	30 Yard Compactor Service	801A	On Call		\$ 0.00 per month	04/01/23			
1	2 Yard Trash Service	E52C	1x per week	M	\$ 125.55 per month	10/01/23			
1	30 Yard Open Top Service	7D8D	On Call		\$ 0.00 per month	10/18/23			

Calendar

The Calendar tool in a customer's account provides a variety of features to service the account with. Right-click within a date on the calendar to add: new services, notes, tasks, manual charges, appointments or to schedule an On Call Order. Active services display on the calendar for the day service is scheduled.



Related Articles (Calendar):

- [Calendar Information](#)
- [Add Task](#)
- [Add Appointment](#)
- [Add Manual Charge](#)
- [Add Note](#)

Orders, Quotes and Contracts

Create and view proposals, order forms and Service Agreements from the Orders, Quotes and Contracts section of a service location.

ID	START DATE	EST. CLOSE DATE	FORMAT	STATUS	MONTHLY REVENUE	SALES REP	TITLE	AUTH/APPROVAL
1020	06/11/21	06/11/21 Medium	Service Contract - sig... A-New Service-noPre...	Open	\$ 0.00	House Acct non System Scott Fisher		
1521	10/27/21	10/27/21 Medium	Service Contract - sig... A-Change in LOB/Eq...	Void	\$ 0.00	House Acct non System Matthew Van Doren		
2001	02/09/22	02/09/22 Medium	Proposal A-New Service	Sold	\$ 0.00	House Acct non System Matthew Van Doren	Pending	
3578	10/27/22	10/27/22 Medium	Service Contract - sig... A-Change in LOB/Eq...	Void	\$ 0.00	House Acct non System Matthew Van Doren		

Service History

A history of all the services a location has received, (or will be receiving) is available to view from the site's Service History section. Select the arrow icon to open the Service History popup window. From here users can view the details for each of the services, print/email a manifest and open the Service Record editor by double-clicking within the row of the desired service.

ORDERS, QUOTES, AND CONTRACTS (4)

SERVICE HISTORY (3) Dispatch

ROUTE	SEQ ↑	ORDER NOTE	SCHEDULED DATE ↑	CREATED ON	WO#	WO TYPE	SERVICE TYPE	SERVICE QTY	CHARGE QTY	EQUIP...	PO /	PHOTOS
			Wed 10/11/23	10/11/23 12:26...	6805040	On Call	RO Dum...	1	6.27	30 Yard Com...		✕
			Wed 10/18/23									
			Wed 11/8/23									

SERVICE HISTORY

Dispatch Future and last 90 days

ROUTE	SEQ ↑	ORDER NOTE	SCHEDULED DATE ↑	CREATED ON	WO#	WO TYPE	SERVICE TYPE	SERVICE QTY	CHARGE QTY	EQUIP...	PO /	PHOTOS
			Wed 10/11/23	10/11/23 12:26...	6805040	On Call	RO Dum...	1	6.27	30 Yard Com...		✕
			Wed 10/18/23	10/18/23 12:54...	6838798	Add Service	RO Deliv...	1	5.00	30 Yard Roll Off		
			Wed 11/8/23	11/28/23 12:33...	7039366	On Call	RO Deliv...	1	0.00	30 Yard Com...		✕