

Account Screen Overview

Last Modified on 11/19/2024 12:39 pm PST

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

The screenshot displays the 'Account Details' and 'Site Details' sections for two accounts. The left account is 'Navusoft Premier Waste And Recycling' (41898) and the right is 'Navusoft - Demo' (41898001). Below these are 'HIGHLIGHTS' and 'ACTIVE SERVICES (3)' with a table of recurring services. At the bottom is a 'CALENDAR' for January 2024 showing events on Jan 4, 5, and 6.

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

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			

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 detailed view shows the 'Account Details' for account 41898. It includes fields for address, division, account manager, class, bill group, and terms. A table shows 'Arrears - Monthly' and 'Next Invoice Date'. Other fields include 'INVOICE BY EMAIL', 'TERMS', 'SOURCE', and 'REBATE PAYMENT TYPE'.

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

ADDRESS LINE 1 8100 Washington Ave DIVISION DAYTON

ADDRESS LINE 2

CITY/STATE/POSTAL CODE Houston TX 77007-1 SOURCE Cold Call

PHONE (207) 555-5555 ACCOUNT MANAGER House Acct non System

ATTN

BILLING PHONE (999) 999-9999 ACCOUNT CLASS COMMERCIAL

FAX (999) 999-9999 AUDITOR

BILLING CONTACT 1 Matthew WEBSITE

BILLING CONTACT 2

PARENT ACCOUNT

LOGO Select logo... **BROWSE...**

OLD ID

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 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	Active
	3		DIVISION DAYTON
	2		ACCOUNT MGR House Acct non System
			CLASS COMMERCIAL
	0		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	Active
	3		DIVISION DAYTON
	2		ACCOUNT MGR House Acct non System
			CLASS COMMERCIAL
	0		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.

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

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.

41898001 Navusoft - Demo

1 of 2 777 Alameda St Active
Los Angeles, CA 90021-1633
Los Angeles County Downtown
US
+1 626-777-7777

DIVISION CORPUS
SERVICE REGION CORPUS OPEN MARKET
SALES REP House Acct non System
SOURCE Cold Call

Edit
View

Acct no... 07/05/2023 11:11

TOTAL RECURRING \$ 125.50
RATE START

EDIT SITE

Basic Settings Billing Settings BIC Profile Required Capabilities

NAME Navusoft - Demo DIVISION CORPUS
NAME 2 SERVICE REGION CORPUS OPEN MARKET
ADDRESS LINE 1 777 Alameda St TAX REGION CC CITY-NUECES COU-CC MTA-CC
ADDRESS LINE 2 ORIGIN
CITY/STATE/POSTAL CODE Los Angeles CA 90021-1 SOURCE Cold Call
PHONE 1 (626) 777-7777 Office SALES REP House Acct non System
PHONE 2 (999) 999-9999 SITE CLASS
OLD ID GENERATOR Not Applicable
PO# EPA
SIGNATURE REQUIRED LEED REPORTABLE STATE ID
ADDITIONAL SERVICE MINUTES


NOTE
WARNING ON OPEN Site warning
ACCESS INFORMATION
BUSINESS HOURS / SERVICE WINDOW


SAVE




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](#)

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.

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ACCESS Gate Code 1234

NOTE Site Notes


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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.

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[1 of 2](#)  Post Oak Blvd
Houston, TX 77057
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US
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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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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

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.


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   **Click to show Site Details**

Active

DIVISION CORPUS
SERVICE REGION CORPUS OPEN MARKET
SALES REP House Acct non System
SOURCE Cold Call

41898001 | Navusoft - Demo 


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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

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.

CALENDAR		January, 2024		EVENTS		AR, Service Records, Rental Fee, Service Chang	
SUN	MON	TUE	WED	THU	FRI	SAT	
Dec 31, 2022	New Years Day	Jan 1	Jan 2	Jan 3	Jan 4	Jan 5	Jan 6
			(1) Isabel Navarro	(1) Isabel Navarro (1) Matthew Van Doren	(1) Isabel Navarro Document Approved (1) Aliena Somers		
Jan 7	(1) Isabel Navarro	Jan 8	Jan 9		Jan 12	Jan 13	
		(1) Isabel Navarro (1) Isabel Navarro					
Jan 14	Jan 15	Jan 16		Jan 18	Jan 19	Jan 20	
Jan 21	Jan 22	Jan 23	Jan 24	Jan 25	Jan 26	Jan 27	
Jan 28	Jan 29	Jan 30	Jan 31	Feb 1	Feb 2	Feb 3	

Related Articles (Calendar):

[Calendar Information](#)

[Add Task](#)










[Add Appointment](#)

[Add Manual Charge](#)

Add Note

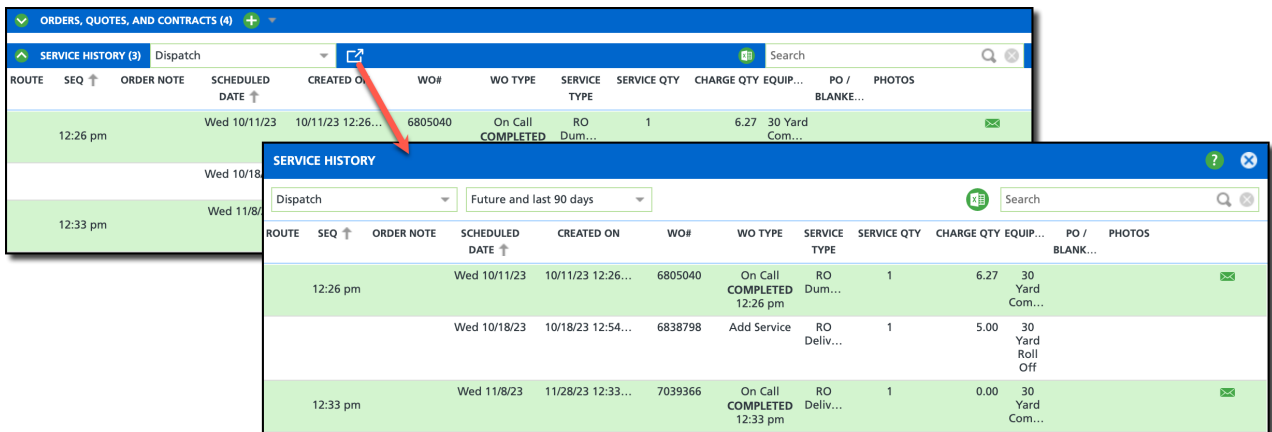
Orders, Quotes and Contracts


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.



ROUTE	SEQ	ORDER NOTE	SCHEDULED DATE	CREATED ON	WO#	WO TYPE	SERVICE TYPE	SERVICE QTY	CHARGE QTY	EQUIP...	PO / BLANK...	PHOTOS
12:26 pm			Wed 10/11/23	10/11/23 12:26...	6805040	On Call COMPLETED	RO Dum...	1	6.27	30 Yard Com...		
12:33 pm			Wed 11/8/23	11/28/23 12:33...	7039366	On Call COMPLETED	RO Deliv...	1	0.00	30 Yard Com...		