


Customer Portal - Reports / Documents

Last Modified on 05/13/2026 3:22 pm PDT

Pathway: *Customer Portal > Reports/Documents*

The "Reports/Documents" button enables users to search for reports and documents associated with the selected account and service locations within a specified time frame. To enable accessibility to reports within the portal, both **Account Class Setup 'Access to Reports'** and **Reports Setup 'Report Portal Access'** must be set to 'Yes.'

 Upon customer request, custom reports can be created to meet specific needs.

The screenshot shows the account overview page for '41898 Navusoft Premier Waste And Recycling'. It includes sections for 'TEST MESSAGE TESTING' with due amounts of \$599.04, 'RECENT SERVICES' with a table of service records, and a sidebar with navigation buttons: 'Invoice History', 'Manage Auto Pay', 'Wallet', and 'Reports / Documents' (highlighted with a red box).

RECENT SERVICES	ID	SERVICE
Wed Feb 28, 2...	7462298 (Completed)	30 Yard Open Top Se...
Fri Jan 12, 2024	7261044 (Completed)	2 Yard Trash Service
Wed Nov 8, 20...	7039366 (Completed)	30 Yard Compactor S...
Wed Oct 11, 2...	6805040 (Completed)	30 Yard Compactor S...
Fri Apr 21, 2023	5915744 (Credit Hold)	30 Yard Compactor S...

The screenshot shows the 'REPORT HISTORY' page. It features a table with columns for 'DATE' and 'FILE NAME'. Below the table is a 'Select Report' dropdown menu.

DATE ↓	FILE NAME
7/20/23	NAVU_DOCSHRED_v2.1.pdf
7/20/23	Navu Manifest.pdf

Criteria

The Reports / Documents button is visible from the customer portal, if the following criteria is met.

Report / Document Filter and Descriptions


Filter	Description
Select Account	Filter by the account the reports or documents are for.
Select Service Location	Filter by the service location the reports or documents are for.
Period	Filter by the month and year period of the document or report.
Select Report	Filter by the report or document type.



Report History

The Report History displays the previous reports that have been completed. To the left of the listed report there is an option to 'download' the report into a PDF.

SELECT ACCOUNT 1 of 8 **SELECT SERVICE LOCATION** 1 of 2

26034 SUNLAND CONSTRUCTION INC 26034001 SUNLAND CONSTRUCTION INC 500 BAYOU DR, CHANNELVII

 **REPORT HISTORY** Period All

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