

Customer Portal Views

Last Modified on 12/03/2024 7:06 am PST

Pathway: Setup > Account > Account Class; Customer Portal

Customer Portal Home Page

The view presented to customers upon logging into their portal account is determined by the account class. Within the account classes setup, system users (with permission 23) can choose the portal home page view customers associated with a specific account class will see from the Customer Portal tab. This article provides examples of each view and what can be expected when a site is inactive.

The screenshot shows the 'ACCOUNT CLASS SETUP' interface. A table lists account classes with columns for ID, NAME, DEFAULT ACCOUNT CREDIT LIMIT, DEFAULT ACCOUNT TERM, DEFAULT REBATE PAYMENT TYPE, DEFAULT BILL BY SITE, GL SEGMENT, GL ACCOUNT, and TYPE. The 'BROKER' account class (ID 1004) is selected. An 'UPDATE ACCOUNT CLASS' dialog is open, showing tabs for Details, Customer Portal, Payment Processing, Status Management, and Finance Charges / Late Fees. The 'CUSTOMER PORTAL HOME PAGE' dropdown is highlighted with a red box and set to 'Service Map and Rec'. Other settings include 'ENABLE PORTAL ACCESS' (Yes), 'ENABLE ADD SITES' (No), 'ENABLE ON CALL ORDERS' (No), 'ENABLE REPORT ACCESS' (Yes), 'ENABLE VIEWING INACTIVE SITE' (No), 'DEFAULT WORK ORDER PHOTO - DISPLAY IN CUSTOMER PORTAL' (Yes), and 'DEFAULT WORK ORDER ATTACHMENT - DISPLAY IN CUSTOMER PORTAL' (No).

Permissions

The following permission must be enabled for a system user to change the 'Customer Portal Home Page' in the Account Class Setup.

Permission ID	Permission Name
23	Setup / Account

Viewing Inactive Sites

When a site is marked as 'Inactive,' customers may be granted restricted access to view the site's service history if "Service History Only" is selected for the **Enable Viewing Inactive Site** setting for the account class. Additionally, if the **Enable Report Access** option is set to "Yes," in Account Class, customers will also have access to their reports and documents.

UPDATE ACCOUNT CLASS ? X

Details **Customer Portal** Payment Processing Status Management Finance Charges / Late Fees

ENABLE PORTAL ACCESS Yes

CUSTOMER PORTAL HOME PAGE Standard

ENABLE ADD SITES No

NEW LOCATION TEMPLATE

NEW LOCATION BUNDLE

ENABLE ON CALL ORDERS Yes

ENABLE REPORT ACCESS Yes

ENABLE VIEWING INACTIVE SITE Service History Only


DEFAULT WORK ORDER PHOTO - DISPLAY IN CUSTOMER PORTAL No

DEFAULT WORK ORDER ATTACHMENT - DISPLAY IN CUSTOMER PORTAL

SELECT ACCOUNT 1 of 15 **SELECT SERVICE LOCATION** 1 of 1

20306 JONES TERESA 20306001 JONES TERESA 444 COUNTY ROAD 4022, DAYTON TX

TEST MESSAGE TESTING



RECENT SERVICES	ID	SERVICE
Fri Jun 30, 2023	6603176 (Service Completed)	2 Yard Trash Service
Thu Jun 29, 20...	6151556 (Service Completed)	2 Yard Trash Service
Thu Dec 29, 2...	5080211 (Service Completed)	2 Yard Trash Service
Thu Dec 22, 2...	5043533 (Service Completed)	2 Yard Trash Service
Thu Dec 15, 2...	5006990 (Service Completed)	2 Yard Trash Service

[VIEW PREVIOUS AND FUTURE SERVICES](#)

Customer Portal Homepages

The account class provides the following homepages. Expand each section to view examples.

SELECT ACCOUNT 1 of 10

41898 Navusoft Premier Waste And Recycling

SELECT SERVICE LOCATION 1 of 3

41898001 Navusoft - Demo Post Oak Blvd, Houston TX

TEST MESSAGE TESTING

\$ 599.04 TOTAL DUE

\$ 599.04 PAST DUE

DAY Portal Div Past Due Text

Make a Payment

Last Payment: 10-12-2023 - Bank Account 72873590_ \$ 50.00

Invoice History

Manage Auto Pay

Wallet

Reports / Documents

RECENT SERVICES

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

[VIEW PREVIOUS AND FUTURE SERVICES](#)

The following descriptions apply to common fields and action buttons that are displayed across many of the views.

Field/Button	Description
Select Account	Drop down to select the account sites are linked to.
Select Service Location	Drop down to select and view the details of a specific site.
Total Due	Displays the total amount that is due for the selected site.
Past Due	Displays the total amount that is past due for the selected site.
Make a Payment	Option to make a payment using a credit card or bank account.
Invoice History	Opens the Invoice and Payment History screen for customers to review and print their invoices.
Manage Auto Pay	Provides customers the ability to manage their auto pay. This includes the ability to turn off automatic payments, or change the payment method.
Payment Methods	Provides customers the ability to add and save payment methods to the system. This is separate from auto pay and if the payment method should be used for automatic payments, once added it will be available as a payment method selection option in the Manage Auto Pay screen.
Requests	Option for customers to submit a request that will populate in <i>Account > Account Request Management</i> . Requests created in the portal are assigned to the account manager assigned to the account.
View All Requests	Displays a history of all requests created in the portal.
Current Services	Displays a list of active services the customer is currently receiving.

Recent Services

Displays a list of recent services. The option to display work order photos and attachments is also available but must be enabled in Setup > Account > Account Class > Customer Portal.

Standard - Homepage

The Standard homepage offers essential account management features and service details. From this interface, customers can perform various actions, such as making payments, accessing invoice history, managing automatic payment arrangements, reviewing recent and ongoing services, and submitting portal requests.

The screenshot displays the Standard homepage interface. At the top, there are two dropdown menus for account and service location selection. Below these, the 'TEST MESSAGE TESTING' section shows a 'TOTAL DUE' of \$599.04 and a 'PAST DUE' of \$599.04. A 'Make a Payment' button is visible, along with a note about the last payment. On the right, a 'RECENT SERVICES' table lists five entries with their dates, IDs, and service types. A 'VIEW PREVIOUS AND FUTURE SERVICES' link is located below the table. At the bottom, there are five navigation buttons: 'Invoice History', 'Manage Auto Pay', 'Wallet', and 'Reports / Documents'.

SELECT ACCOUNT	1 of 10	SELECT SERVICE LOCATION	1 of 3
41898 Navusoft Premier Waste And Recycling		41898001 Navusoft - Demo Post Oak Blvd, Houston TX	

TEST MESSAGE TESTING

\$ 599.04 TOTAL DUE

\$ 599.04 PAST DUE

DAY Portal Div Past Due Text

Make a Payment

Last Payment: 10-12-2023 - Bank Account 72873590_ \$ 50.00

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[VIEW PREVIOUS AND FUTURE SERVICES](#)

Invoice History

Manage Auto Pay

Wallet

Reports / Documents

AR Only - Homepage

The AR Only homepage exclusively shows items related to the customer's accounts receivable. This includes viewing invoices and balances, making payments, and managing payment methods and auto-pay.

SELECT ACCOUNT

1 of 11

41898 Navusoft Premier Waste And Recycling

TEST MESSAGE TESTING

\$ 599.04

TOTAL DUE

\$ 599.04

PAST DUE

DAY Portal Div Past Due Text



Make a Payment

Last Payment: 10-12-2023 - Bank Account 72873590_ \$ 50.00



Invoice History



Manage Auto Pay



Wallet



Reports / Documents

RECENT SERVICES	ID	SERVICE
Wed Feb 28, 2...	7462298 (Completed)	30 Yard Open Top Se...
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[VIEW PREVIOUS AND FUTURE SERVICES](#)

Mail Back - Homepage

The Mail Back homepage features a pie graph displaying recycling rates for all sites or the current site being viewed. Additionally, customers have access to the Recycling Composition Report from this portal view by selecting the PDF icon associated with the graph.

SELECT ACCOUNT
1 of 1
SELECT SERVICE LOCATION
1 of 1

21638 BIG STATE

21638001 BIG STATE 12911 Farm to Market 1960 Rd W, Houston TX

TEST MESSAGE TESTING

\$ 0.00

TOTAL DUE

\$ 0.00

PAST DUE

Last Payment: 12-11-2023 - Visa
123456_DEMO_AUTH \$ 731.40

Invoice History

Automatic payment activated - 15th of each month (Visa 1111
Exp: 10/33)

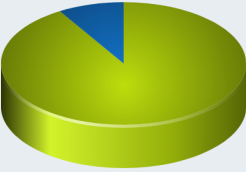
Reports / Documents (3)

RECENT SERVICES

	ID	SERVICE
Mon Jul 8, 2024	7904637	4 Yard Trash Service
Mon Mar 25, ...	7403228 (Completed - Recycling Contaminated)	4 Yard Trash Service
Mon Feb 26, 2...	7259940 (Not Serviced - Bin Blocked)	4 Yard Trash Service
Mon Feb 5, 2024	7142482 (Not Serviced - Bin Overloaded)	4 Yard Trash Service
Mon Aug 14, ...	6303866 (Completed)	4 Yard Trash Service

[VIEW PREVIOUS AND FUTURE SERVICES](#)

DIVERSION / LEED YTD




● Recycled Waste
● Solid Waste (Non-Recyclable)

Recycled Waste	91.3%	789.00 tons	
Solid Waste (Non-Recyclable)	8.7%	75.39 tons	VIEW DETAILS

2024
All Sites

You saved
0 tree(s)



No data to display.

Vendor - Homepage

The Vendor homepage applies to vendor accounts. This view **excludes** AR information (except for the option to view invoice history), but does include additional features such as viewing Open Orders and Scheduled Services.

SELECT ACCOUNT 1 of 8 **SELECT SERVICE LOCATION** 1 of 1
 7777000 LOCAL BUSINESS 71717 LIBERTY 7777000 LOCAL BUSINESS 71717 LIBERTY 2320 N MAIN ST, LIBERTY TX

\$ 0.00 TOTAL DUE TO VENDOR

[Invoice History](#) [Open Orders \(0\)](#) [Bid Opportunities \(0\)](#) [Scheduled Services](#)

DATE	ID	ACCOUNT ID	AMOUNT	ADDRESS	STATUS	ADJUSTMENT	BALANCE	NOTES
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Service Map And Request - Home Page

The Service Map and Request homepage features an AR section for the account and includes additional features to view the service map, requests, and disposal tickets.

SELECT ACCOUNT 1 of 11
 41898 Navusoft Premier Waste And Recycling

[Accounts Receivable](#) [Service Map](#) [Service Exceptions](#) [Requests](#) [Disposal Tickets](#)

\$ 599.04 TOTAL DUE
\$ 599.04 PAST DUE

DAY Portal Div Past Due Text

[\\$ Make a Payment](#)
Last Payment: 10-12-2023 - Bank Account 72873590_ \$ 50.00

[Invoice History](#)
[Manage Auto Pay](#)
[Wallet](#)
[Reports / Documents](#)

REQUESTS [CLICK HERE TO SUBMIT ONLINE REQUEST](#)

[VIEW ALL REQUESTS](#)

Descriptions

Action Button	Description
Accounts Receivable	Default display showing the action buttons associated with accounts receivable.

Service Map	Displays the service map of the service locations that belong to the account.
Requests	The customer service screen displays a history of requests submitted from the portal, as well as account requests created in Navusoft.
Disposal Tickets	Provides a history of disposal ticket records that can be searched using a date range.

MRF/Recycling - Home Page

The MRF/Recycling homepage currently displays the AR section, Current Services and Recent Services sections.

SELECT ACCOUNT 1 of 11

41898 Navusoft Premier Waste And Recycling ▼

SELECT SERVICE LOCATION 1 of 3

41898001 Navusoft - Demo Post Oak Blvd, Houston TX ▼

TEST MESSAGE TESTING

\$ 599.04

TOTAL DUE

\$ 599.04

PAST DUE

DAY Portal Div Past Due Text

\$ Make a Payment

Last Payment: 10-12-2023 - Bank Account 72873590_ \$ 50.00

📄 Invoice History

🔄 Manage Auto Pay

\$ Wallet

📄 Reports / Documents

RECENT SERVICES	ID	SERVICE
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🖨️ Wed Oct 11, 2...	6805040 (Completed)	30 Yard Compactor S...
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[VIEW PREVIOUS AND FUTURE SERVICES](#)

Calendar View - Home Page

The Calendar View homepage includes the addition of an Activity Calendar. Items displayed in the calendar, such as services and requests, are live links that allow customers to select and review its details further.

SELECT ACCOUNT
1 of 11
SELECT SERVICE LOCATION
1 of 3

41898 Navusoft Premier Waste And Recycling

41898001 Navusoft - Demo Post Oak Blvd, Houston TX

\$ 599.04 TOTAL DUE

\$ 599.04 PAST DUE

DAY Portal Div Past Due Text

\$ **Make a Payment**

Last Payment: 10-12-2023 - Bank Account 72873590_ \$ 50.00

Invoice History

Manage Auto Pay

Wallet

Reports / Documents

REQUESTS [CLICK HERE TO SUBMIT ONLINE REQUEST](#)

[VIEW ALL REQUESTS](#)

CURRENT SERVICES	FREQUENCY	NEXT SCHEDULED
PRINT CALENDAR		

ACTIVITY CALENDAR 📅 🔍 July, 2024 📅

MON	TUE	WED	THU	FRI	SAT/SUN
Jul 1 🚚 1, FL_SERVICE...	Jul 2	Jul 3	Jul 4	Jul 5	Jul 6/30
Jul 8 🚚 1, FL_SERVICE...	Jul 9	Jul 10	Jul 11	Jul 12	Jul 13/7
Jul 15 🚚 1, FL_SERVICE...	Jul 16	Jul 17	Jul 18	Jul 19	Jul 20/14
Jul 22 🚚 1, FL_SERVICE...	Jul 23	Jul 24	Jul 25	Jul 26	Jul 27/21
Jul 29 🚚 1, FL_SERVICE...	Jul 30	Jul 31	Aug 1	Aug 2	Aug 3/28

Brokered Account - Home Page

The Brokered Account View homepage provides many of the same items as the other views, but it also includes a Diversion / LEED YTD section with a pie graph.

SELECT ACCOUNT

1 of 11

SELECT SERVICE LOCATION

1 of 3

41898 Navusoft Premier Waste And Recycling

41898001 Navusoft - Demo Post Oak Blvd, Houston TX

TEST MESSAGE TESTING

\$ 599.04

TOTAL DUE

\$ 599.04

PAST DUE

DAY Portal Div Past Due Text

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Last Payment: 10-12-2023 - Bank Account 72873590_ \$ 50.00

 Invoice History

 Manage Auto Pay

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 Reports / Documents

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[VIEW PREVIOUS AND FUTURE SERVICES](#)