

# [Archive] Release Version 65

Last Modified on 02/14/2025 6:43 am PST



The release notes in this article correspond to version 65. Screens and logic may have changed in newer versions.

## Accounting

### GL Batch Processing - AR Period Drop Down List Updated (13821)

The AR Period drop down field in the Pending and Posted tabs of the GL Batch Processing tool have been updated to list all AR periods that have an AR record.

AR PERIOD	ID	ERRORS	AR PERIOD	DATE	COUNT	POSTED BY
Mar 2019 (10)						
Apr 2019 (22)	1000	Yes	2019-03	03/01/2019	2309	Navisoft 03/13/2019 7:53 pm
May 2019 (23)	1055	Yes	2019-03	07/10/2019	1	Sandy Soto (inactive) 07/10/2019 11:15 am
Jun 2019 (19)	1056	Yes	2019-03	07/10/2019	3	Sandy Soto (inactive) 07/10/2019 11:23 am
Jul 2019 (98)	1057	Yes	2019-03	07/10/2019	2	Sandy Soto (inactive) 07/10/2019 11:25 am
Aug 2019 (60)	1058	Yes	2019-03	07/10/2019	2	Sandy Soto (inactive) 07/10/2019 11:26 am
Sep 2019 (58)	1059	Yes	2019-03	07/10/2019	2	Sandy Soto (inactive) 07/10/2019 11:26 am
Oct 2019 (61)	1060	Yes	2019-03	07/10/2019	3	Sandy Soto (inactive) 07/10/2019 11:28 am
Nov 2019 (111)	1061	Yes	2019-03	07/10/2019	2	Sandy Soto (inactive) 07/10/2019 11:32 am
Dec 2019 (104)	1062	Yes	2019-03	07/10/2019	2	Sandy Soto (inactive) 07/10/2019 11:33 am
Jan 2020 (300)	1063	Yes	2019-03	07/10/2019	1	Sandy Soto (inactive) 07/10/2019 12:29 pm
Feb 2020 (333)						

Pathway: Accounting > GL Batch Processing

### Credit Card Expiration- Multiple Screen Enhancements (13856)[Enhancement]

The following enhancements have been made to the Credit Card Expiration tool:

1. Added a new Active Services filter with options: All (default), Yes and No.
2. Added a new 'Active Services' column to indicate if the credit card is linked to any active services currently being billed for.
3. Addition of the 'Send Credit Card Expiration Notification' right-click option. If selected, a credit card expiration notification is immediately sent to the billing contacts on the account. Contacts may receive the notification in either text or email form depending on their notification contact preferences.

EXPIRATION DATE	AUTO PAY	LAST HOUR	HAS ACTIVE SERVICES	LAST TRANSACTION	ACCOUNT	ACCOUNT STATUS	HAS ACTIVE SERVICES
12/31/2021 Expired	No	1200	No	Approved \$90.95 on 10/04/2019	3304.100.VETS.BNC	Active	No
12/31/2021 Expired	No	1200	No	Approved \$90.95 on 10/04/2019	3304.100.VETS.BNC	Active	No
12/31/2021 Expired	No	1200	No	Approved \$90.95 on 10/04/2019	3304.100.VETS.BNC	Active	No
12/31/2021 Expired	No	1200	No	Approved \$90.95 on 10/04/2019	3304.100.VETS.BNC	Active	No
06/30/2022 Expired	Scheduled Day	0587	Mastercard	Approved \$0.00 on 01/10/2020	21803.TROOP/CASA	Active	Yes
06/30/2022 Expired	Scheduled Day	0587	Mastercard	Approved \$0.00	21803.TROOP/CASA	Active	Yes
06/30/2022 Expired	Scheduled Day	0587	Mastercard	Approved \$0.00	21803.TROOP/CASA	Active	Yes
06/30/2022 Expired	No	1533	Mastercard	Approved \$200.04 on 01/15/2020	6587.HENRY BONES	Active	Yes
03/31/2020 Expired	No	4868	Visa	Approved \$1,126.61 on 01/15/2020	19120.SARASOTA FIRE DEPARTMENT	Active	No
07/31/2020 Expired	No	2405	Visa	Approved \$90.95 on 01/15/2020	2058.MICHAEL TISOALE	Credit Hold	Yes
07/31/2020 Expired	No	2405	Visa	Approved \$90.95 on 01/15/2020	2058.MICHAEL TISOALE	Credit Hold	Yes
07/31/2020 Expired	No	2405	Visa	Approved \$90.95 on 01/15/2020	2058.MICHAEL TISOALE	Credit Hold	Yes
07/31/2020 Expired	No	2405	Visa	Approved \$480.36 on 01/15/2020	2058.MICHAEL TISOALE	Credit Hold	Yes
07/31/2020 Expired	No	2405	Visa	Approved \$90.95 on 01/15/2020	2058.MICHAEL TISOALE	Credit Hold	Yes
07/31/2020 Expired	No	2405	Visa	Approved \$98.12 on 01/15/2020	2058.MICHAEL TISOALE	Credit Hold	Yes
07/31/2020 Expired	No	2405	Visa	Approved \$98.12 on 01/15/2020	2058.MICHAEL TISOALE	Credit Hold	Yes
06/30/2021 Expired	No	2023	Mastercard	Approved \$37.96 on 01/02/2020	6113.BROWN MAINTENANCE	Active	No
06/30/2021 Expired	No	2023	Mastercard	Approved \$48.17 on 01/02/2020	6113.BROWN MAINTENANCE	Active	No

Pathway: Accounting > Credit Card Expiration

## AR Payment Batch - Un-post Logic Updated For Batches That Include Reversed or Transferred Payments (13869)

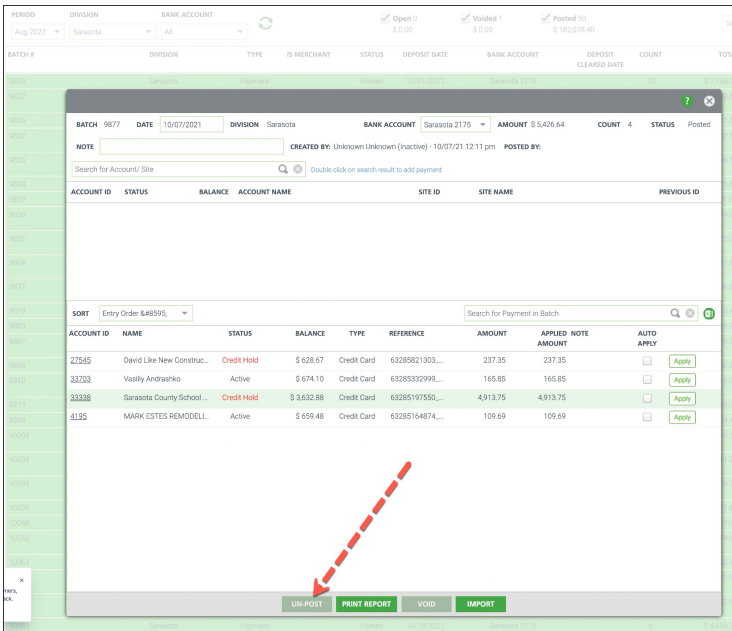
Logic has been updated to the Un-post option for posted batches. If a posted batch includes at least one payment that was reversed or transferred (includes both full or partial transfers), the batch cannot be un-posted.

BATCH 10281	DATE 05/04/2022	DIVISION Clearwater	BANK ACCOUNT Clearwater 799	AMOUNT \$ 100.00	COUNT 1	STATUS Posted
NOTE		CREATED BY: Navosoft m - 05/04/22 7:05 pm		POSTED BY: Navosoft m - 05/04/22 7:10 pm		
Search for Account/ Site						
ACCOUNT ID	STATUS	BALANCE	ACCOUNT NAME	SITE ID	SITE NAME	PREVIOUS ID
SORT Entry Order & #8595;						
ACCOUNT ID	NAME	STATUS	BALANCE	TYPE	REFERENCE	AMOUNT APPLIED NOTE AMOUNT
21894	Kristina Campbell	Active	\$ 71.85	Cash		100.00 0.00
<input type="checkbox"/> UN-POST <input type="button" value="PRINT REPORT"/> <input type="button" value="VOID"/> <input type="button" value="IMPORT"/>						

Pathway: Accounting > AR Payment Batch

## Payment Batch - Un-post Logic Updated for Credit Card and Electronic Payment Batches (13883)

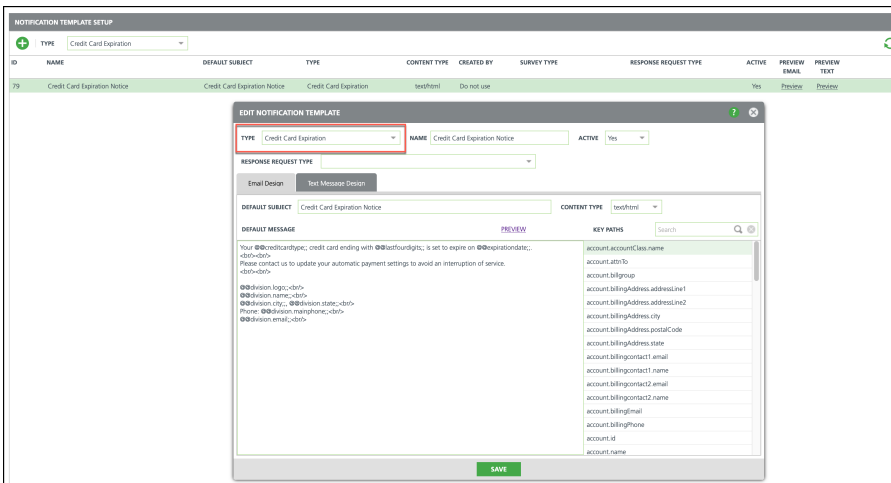
Previously, the 'Un-post' option was available to un-post credit card and electronic payment batches. This option has been disabled for batches that include credit and electronic payments.



Pathway: Accounting > AR Payment Batch

## Credit Card Expiration - Addition of Automatic Notifications (13857)[Enhancement]

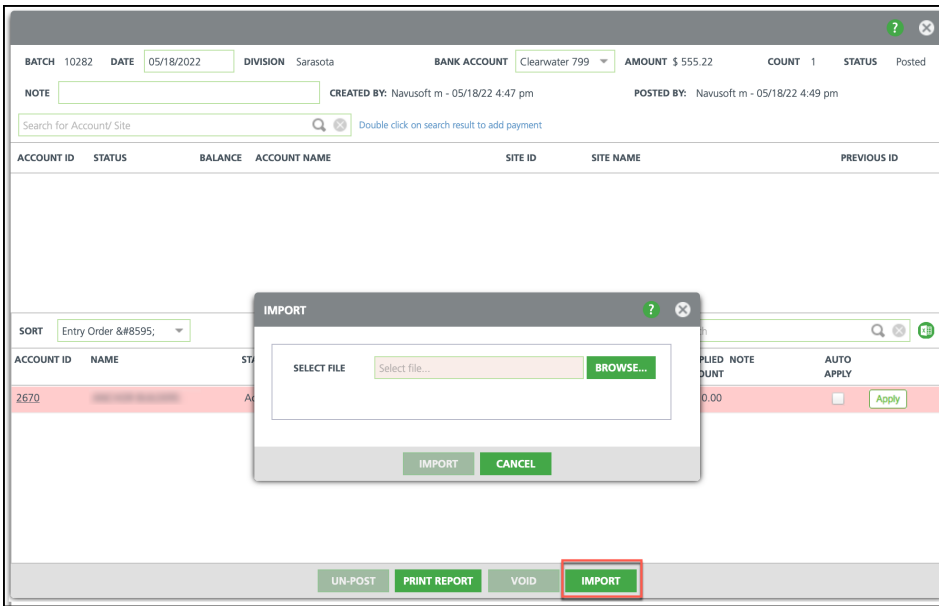
A new notification template has been created to notify an account's billing contacts that the credit card on file will soon expire. Notifications are triggered 30 days from, 7 days from and the day of expiration. Billing contacts will receive notifications in the form of either a text or email based on their notification preference setting.



Pathway: Accounting > Credit Card Expiration; Setup > System > Notification Template - Credit Card Expiration

## AR Payment Batch- Error Message Displays When Attempting to Upload a File (13922)

Previously, an issue was causing an error message to display when a user attempted import a file into AR Payment Batch. This has been fixed.

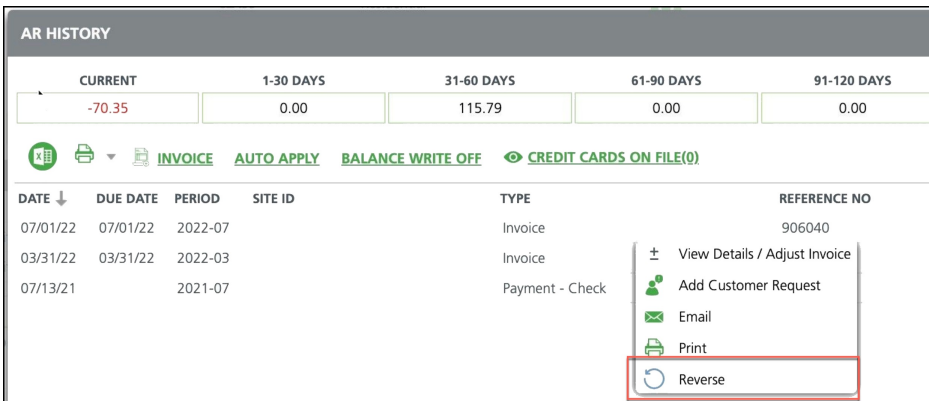


Pathway: Accounting > AR payment Batch

## Customer Service Screen

### Customer AR History- Logic Updated For Invoice Reversals (13834)

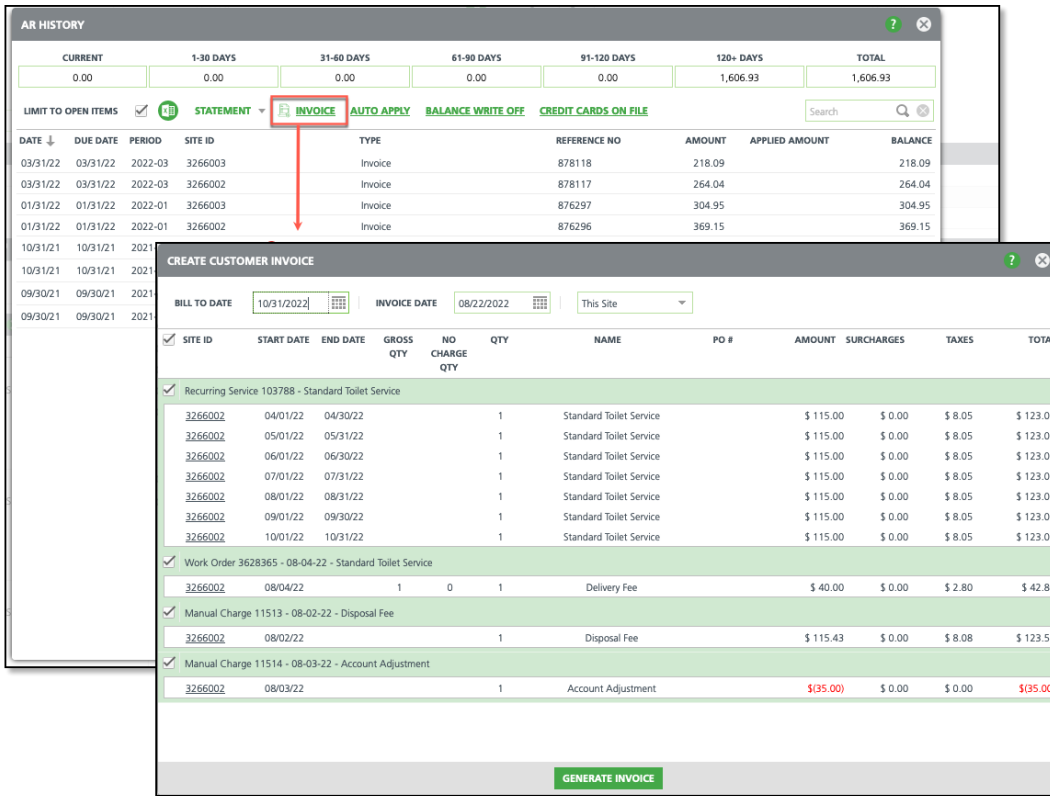
Logic has been updated to Customer AR History to prevent the reversal of invoices if the invoice is referenced in a more recent invoice. Only the latest invoice for an account/site can be reversed IF the posting period is still open. Reverse will not display if the invoice cannot be reversed.



Pathway: Customer > Search > AR History (Displays in Customer details)

### AR History - Option to Add/Remove Service Record Line Items for Single Invoices (13941) [Enhancement]

Single invoices generated from a customer's account have been updated to allow users to add or remove service record line items before generating the invoice. With this change, recurring services will display grouped together as one line item and a unique record will display for each manual charge and work order.

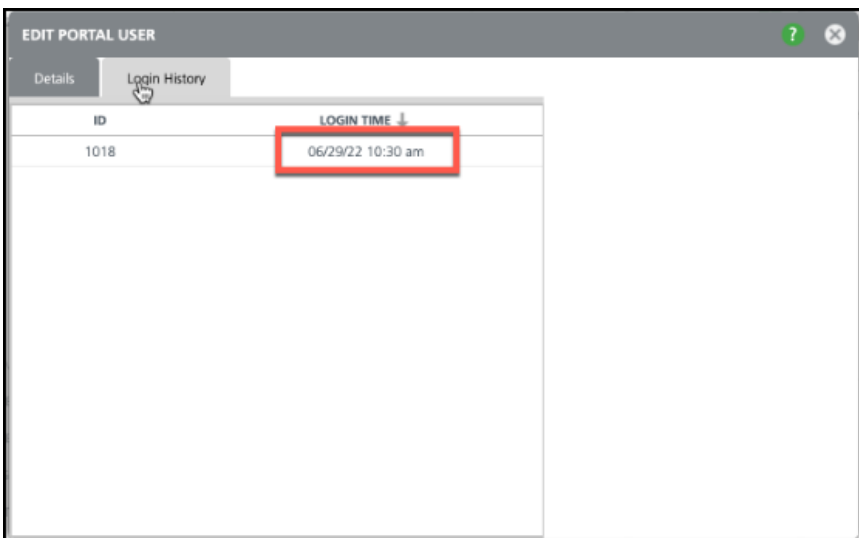


Pathway: Customer > Search > AR History (Customer Details)

Article: [Generate Single Invoice](#)

### Portal - Last Login Time Stamp Recording Incorrect Time (13853)

A fix has been made to the Login History tab in Edit Portal User for account contacts. Previously, when viewing the contact's 'Login Time' from the Login History tab, the time displayed did not match the time displayed in the Details tab or anywhere else the login timestamp displays. This has been fixed so all timestamps display the same local time of the account.

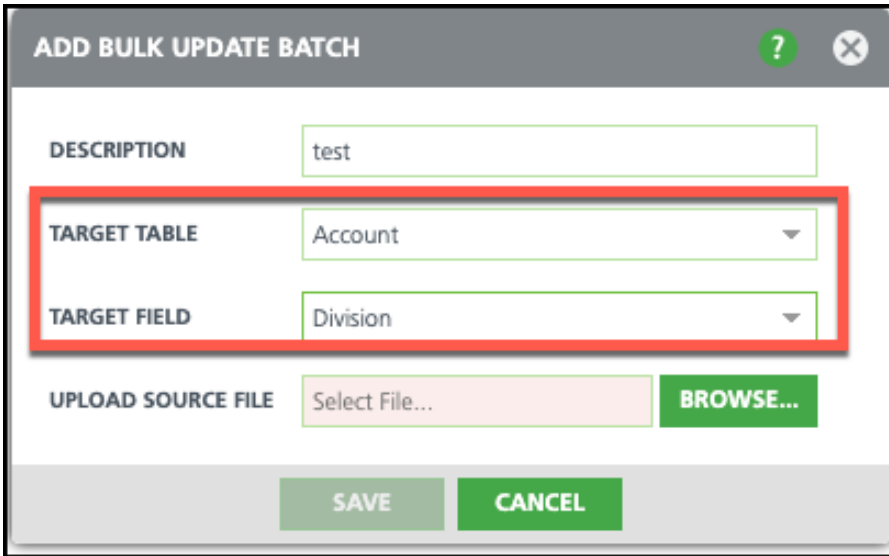


Pathway: Customer > Search > Contacts

## Database

### Bulk Update - Division Added to Target Table Field in Bulk Update Tool (13840)[Enhancement]

An enhancement has been made to the target field in the bulk update tool. Division is now an available option in the Target Field drop down when Account has been selected in the Target Table.



ADD BULK UPDATE BATCH

DESCRIPTION: test

TARGET TABLE: Account

TARGET FIELD: Division

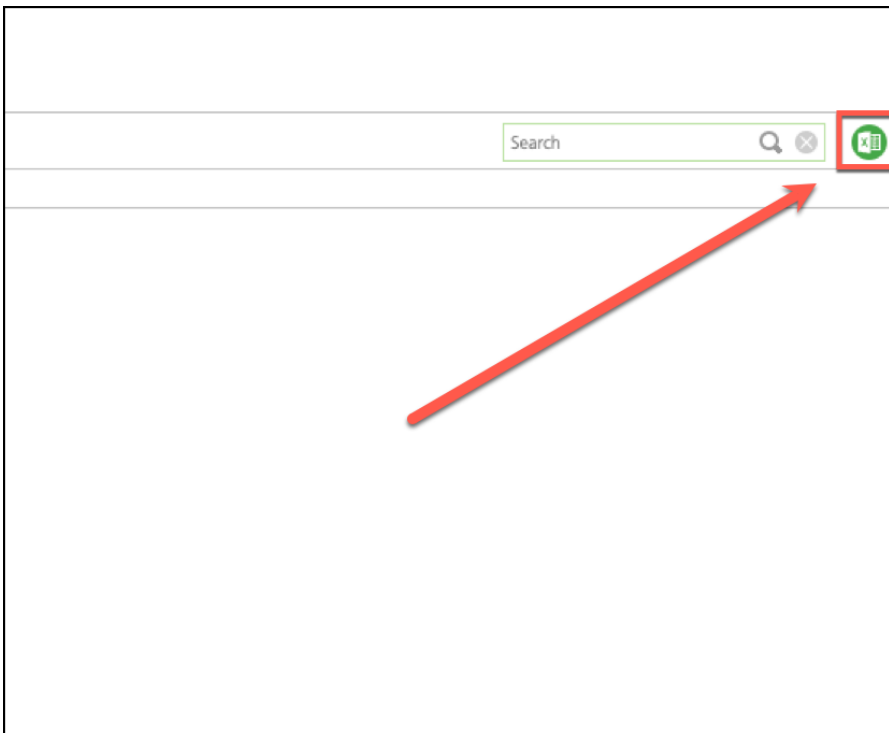
UPLOAD SOURCE FILE: Select File... BROWSE...

SAVE CANCEL

Pathway: Database > Bulk Update

### Database - Added an Excel Export option on toolbar (Enhancement) (13915)

We have now added an Excel Export icon in upper right corner of screen.



Pathway: Database > Notification History

### Database - Division Filter added to Drop Down (Enhancement)(13913)

We have added a Division Filter to the Drop Down section at the top left of the screen.

DIVISION	DATE	START DATE	END DATE	NOTIFICATION TEMPLATE TYPE	DELIVERY STATUS	SENT BY	TYPE	TO EMAIL
All	Custom Range	06/06/2022	07/12/2022	All	All	All	All	
<b>LOAD</b>								
SENT ON ↓	FROM	TO	DELIVERY STATUS	DIVISION				
07/11/22 12:38 pm 69340			Delivered					
07/11/22 12:38 pm 69341		matthew@navusoft.com Matthew Van Doren 28111 Navusoft - Setup - Inland	Delivered					
07/11/22 12:38 pm 69339			Delivered					
07/11/22 12:36 pm 69337			Delivered					
07/11/22 12:36 pm 69338		matthew@navusoft.com Matthew Van Doren 28111 Navusoft - Setup - Inland	Delivered					
07/11/22 12:35 pm 69336			Delivered					
07/11/22 8:18 am 69335			Delivered					
07/05/22 7:31 am 69334			Delivered					
07/05/22 7:29 am 69332	matthew@navusoft.com Navusoft m	matthew@navusoft.com Matthew Van Doren 34360001 Poetry & Crane	Delivered					

Pathway: Database > Notification History

## Operations

### Manifest Consolidation - Screen Updates(13965)[Enhancement]

We have now added a drop down check box selection of options and 2 columns to display the Status and Source. Once the status has been changed it will be reflected in the column as well as the source in the column next to it.

SOURCE	SHIP DATE	STATUS	SOURCE	TRANSPORTER	DESTINATION	STATUS	LOAD	SEARCH	18297 / 6833 15 lb(s)
2486		Open				<input type="checkbox"/> All <input type="checkbox"/> Open <input type="checkbox"/> Posted <input type="checkbox"/> Voided <input type="checkbox"/> Shipped <input type="checkbox"/> Ready to Ship			
1630	04/27/2021	Posted							0
1898	10/13/2021	Posted							615
2151	02/01/2022	Posted							660
2186	02/08/2022	Posted							696
2354	04/19/2022	Posted							581
1803	08/24/2021	Posted			Lease Truck				608
2116	01/19/2022	Posted							563
2279	03/22/2022	Posted							743
1991	11/23/2021	Posted							692
1823	08/31/2021	Posted							723
2387	05/03/2022	Posted							475
1669	06/09/2021	Posted			Lease Truck				591
2231	03/01/2022	Posted							539
2420	05/12/2022	Posted							687
1755	08/10/2021	Posted							600
1936	10/26/2021	Posted							482
1963	11/09/2021	Posted							614
2319	04/05/2022	Posted							575
2024	12/02/2021	Posted							725
2043	12/21/2021	Posted							317
2090	01/04/2022	Posted							712
1867	09/28/2021	Posted							727
2205	02/15/2022	Posted							660
1659	05/19/2021	Posted			Lease Truck				658
1692	06/30/2021	Posted			Lease Truck				333
1644	05/10/2021	Posted							530
1721	07/20/2021	Posted							431
2258	03/08/2022	Posted							528
1614	04/05/2021	Posted							607
1839	09/14/2021	Posted							355
1791	08/10/2021	Voided							584
2447	08/04/2022	Shipped							0
1623	04/14/2021	Ready to Ship			Lease Truck				495
									2576.00

Pathway: Operations > Manifest Consolidation

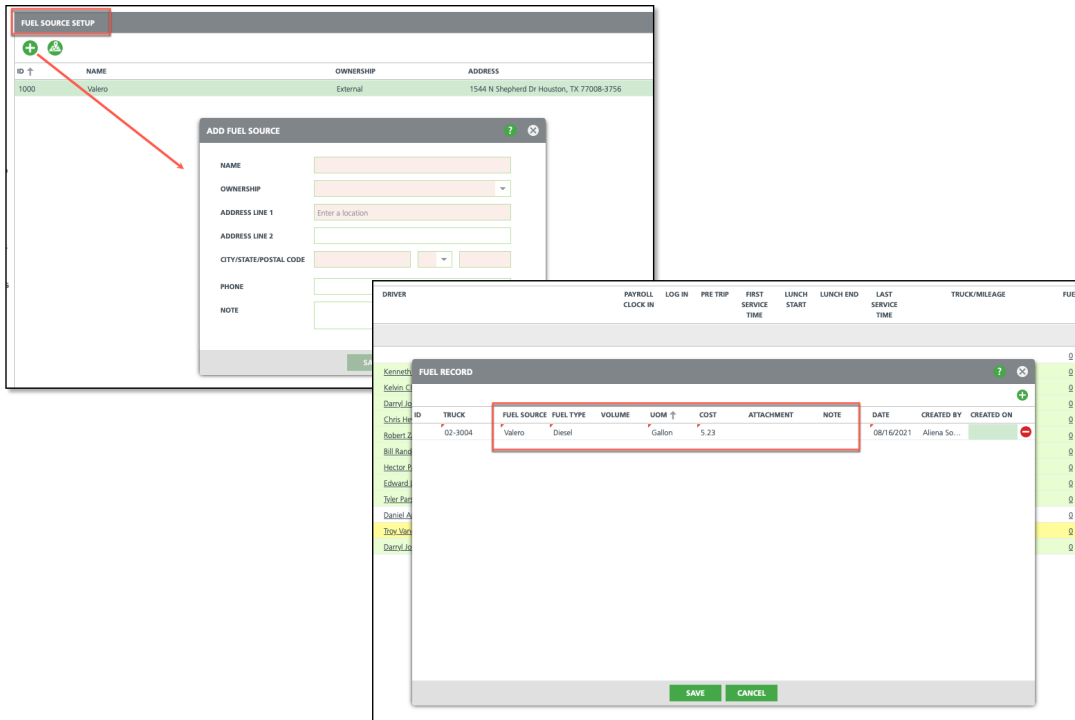
### Fuel Record - Fields Added to Fuel Record (13929 & 13968)[Enhancement]

The Fuel Records screen has been updated to include the following additional fields:

- **Fuel Source** - Click within the column and select the fuel source from the drop down options. Fuel sources are

added in *Setup > Operations > Fuel Source*.

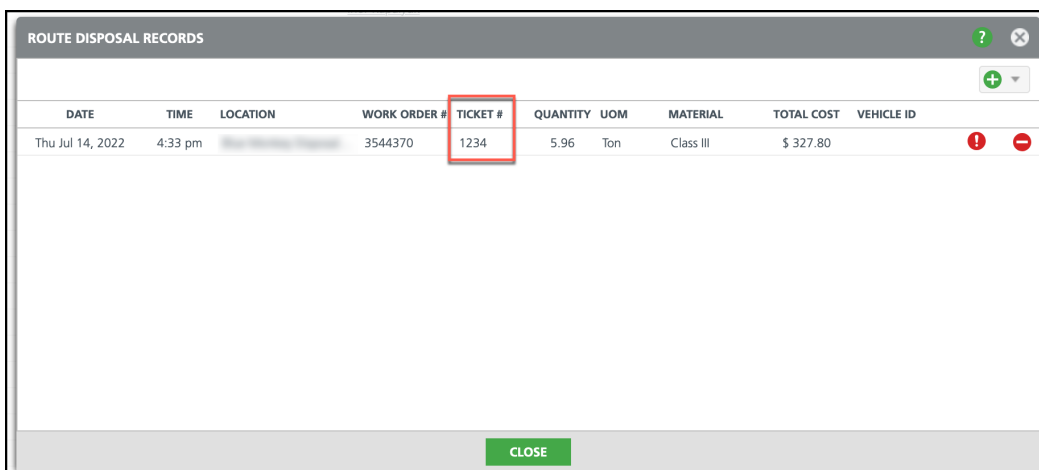
- **Fuel Type** - Click within the column and select the fuel type from the drop down options.
- **UOM** - Click within the column and select the UOM from the drop down options.
- **Cost** - Click within the column to enter the fuel rate.
- **Attachment** - Select within the column to attach photos and attachments to the fuel record. Formats allowed: PDF, PNG, JPEG.
- **Note** - Text field to record any notes (if needed).



Pathway: *Operations > Dispatch - Route Productivity (View); Setup > Operations > Fuel Source*

### Dispatch - Ticket Number Added to Route Disposal Records (13855)

A Ticket Number column has been added to the Route Disposal Records screen and displays the ticket number the driver received from the disposal location.

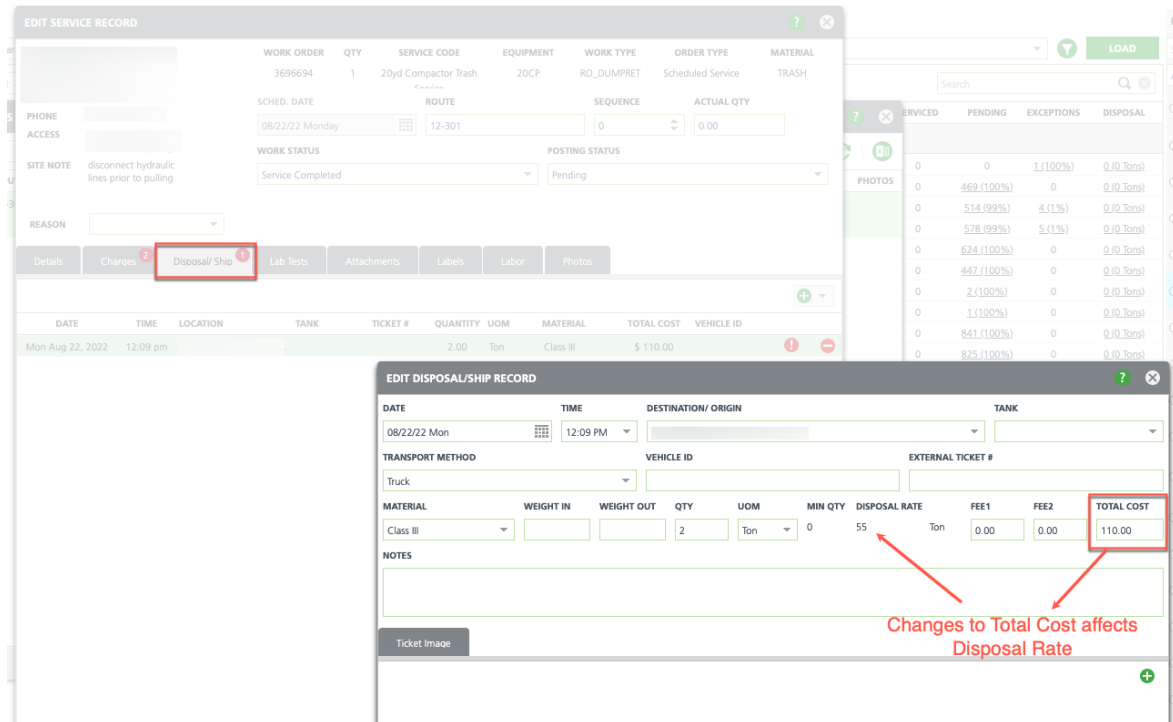




Pathway: Operations > Dispatch (Route Disposal Record)

### Disposal Records- Option to Adjust Total Cost (13970)[Enhancement]

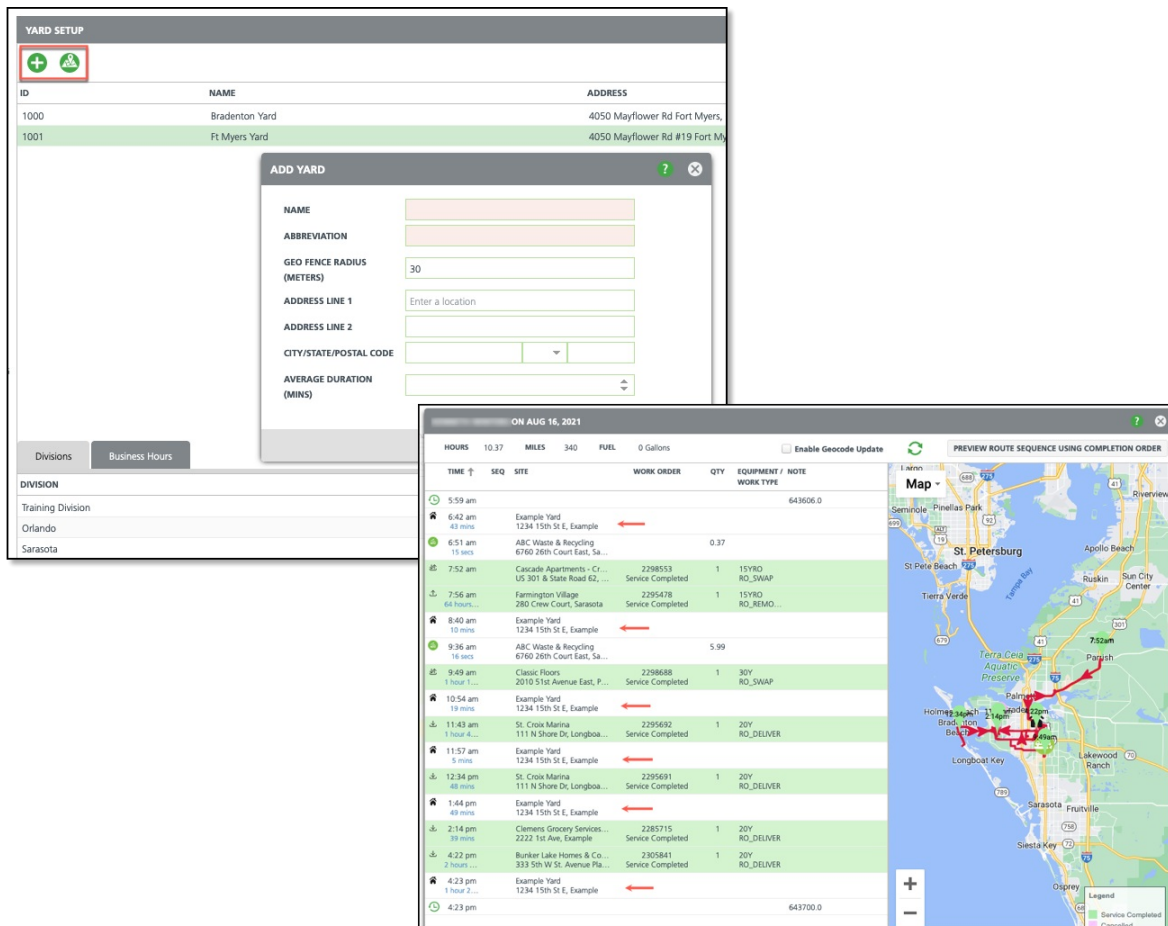
Edit functionality has been added to disposal records for the Total Cost field. Changes made to *Total Cost* will update the Disposal Rate on the disposal record.



Pathway: Operations > Dispatch

### Driver Timeline - Yard Visit Add to Driver Timeline (13862 & 13854)[Enhancement]

A new feature has been added to track when a driver has visited the yard in the Driver Timeline. This feature requires additional setup in *Setup > Operations > Yard* to identify the yard's location and to establish a geofence radius (meters) that will detect when the truck has entered the yard. In addition, the Yard setup tool includes the ability to manually update the yard's location by pin movement using a Mapping tool.



Pathways: Setup > Operations > Yard; Operations > Dispatch

## Disposal/Ship Record - Automatic Conversion of the Disposal Rate's UOM to Calculate Cost

Previously, if a driver was provided a disposal ticket in pounds, but the disposal location rates were per ton, the user would manually have to update the Disposal Record to convert to Tons. This has been updated to automatically convert the weight of the Disposal Location/Disposal Rate UOM to match the UOM recorded for the Disposal Record.

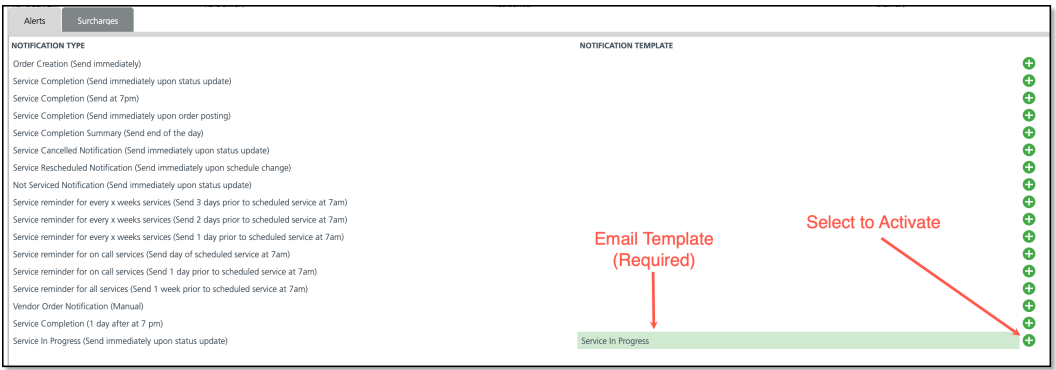
Pathway: Drivers Disposal Screen

## Setup

### Operations - New Alert Notification Type (13389)[Enhancement]

A new Notification Type 'Service In Progress' has been added to Alerts in Setup > Work Type. Customers will receive the 'Service In Progress' notification once the status of the work order has changed from Scheduled to In Progress. To enable the notification:

- Create an email template and attach it to the Notification Type 'Service In Progress'
- Select the green '+' icon for the notification



Pathway: Setup > Operations > Work Type

## Service Code - Screen is Experiencing a Longer Load Time (13842)

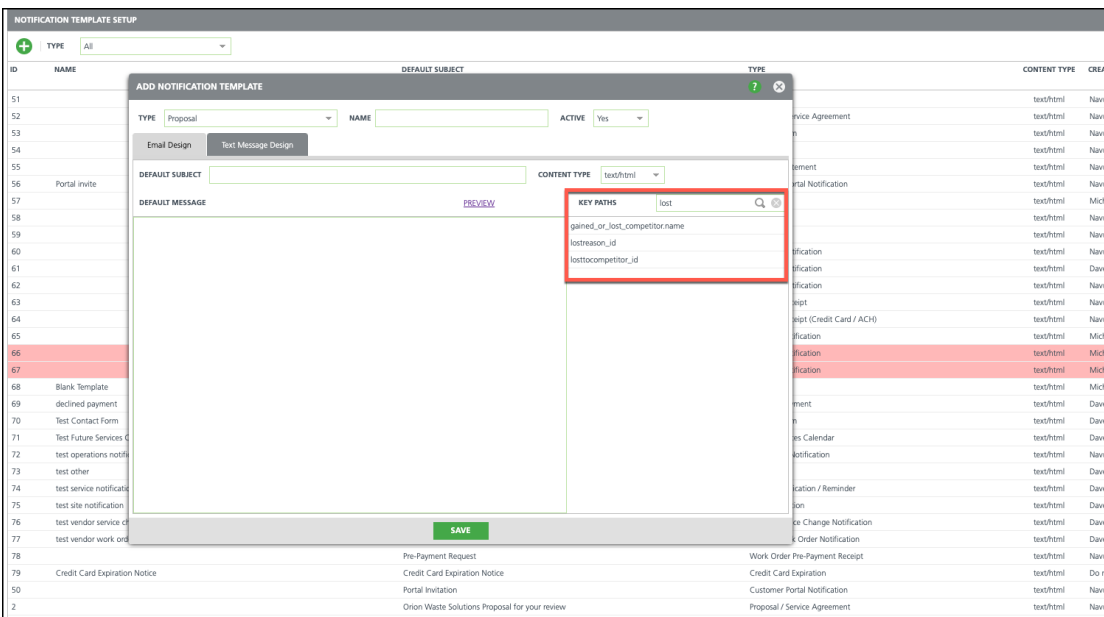
A performance issue was causing the Service Code screen to take longer to load. This has been fixed.

SERVICE CODE SETUP							
ID	NAME ↑	LINE OF BUSINESS	EQUIPMENT TYPE	MATERIAL TYPE	UOM	IS TAXABLE	TAX
RO10T	10 Yard Open Top Service	Roll Off	10 Yard Roll Off		Month	Yes	
FL10R	10 Yard Recycle Service	Commercial	10 Yard FL	Recycle	Month	Yes	
FL10T	10 Yard Trash Service	Commercial	10 Yard FL	MSW	Month	Yes	
RO15T	15 Yard Open Top Service	Roll Off	15 Yard Roll Off		Month	Yes	
RS18R	18 Gal Recycle	Residential	18 Gallon Recycle	Recycle	Month	No	
FLO2R	2 Yard Recycle Service	Commercial	2 Yard FL	Recycle	Month	Yes	
RL02R	2 Yard Recycle Service	Residential	2 Yard RL	Recycle	Month	Yes	
FLO2T	2 Yard Trash Service	Commercial	2 Yard FL	MSW	Month	Yes	
RL02T	2 Yard Trash Service	Residential	2 Yard RL	MSW	Month	Yes	
FLO2VIPR	2 Yard VIP Recycle Service	Commercial	2 Yard FL VIP	Recycle	Month	Yes	
FLO2VIPT	2 Yard VIP Trash Service	Commercial	2 Yard FL VIP	MSW	Month	Yes	
CP20T	20 Yard Compactor Service	Roll Off	20 Yard Compac...		Month	No	

Pathway: Setup > Services > Service Code

## Notification Template -New Key Paths added to Proposal Template (13307) [Enhancement]

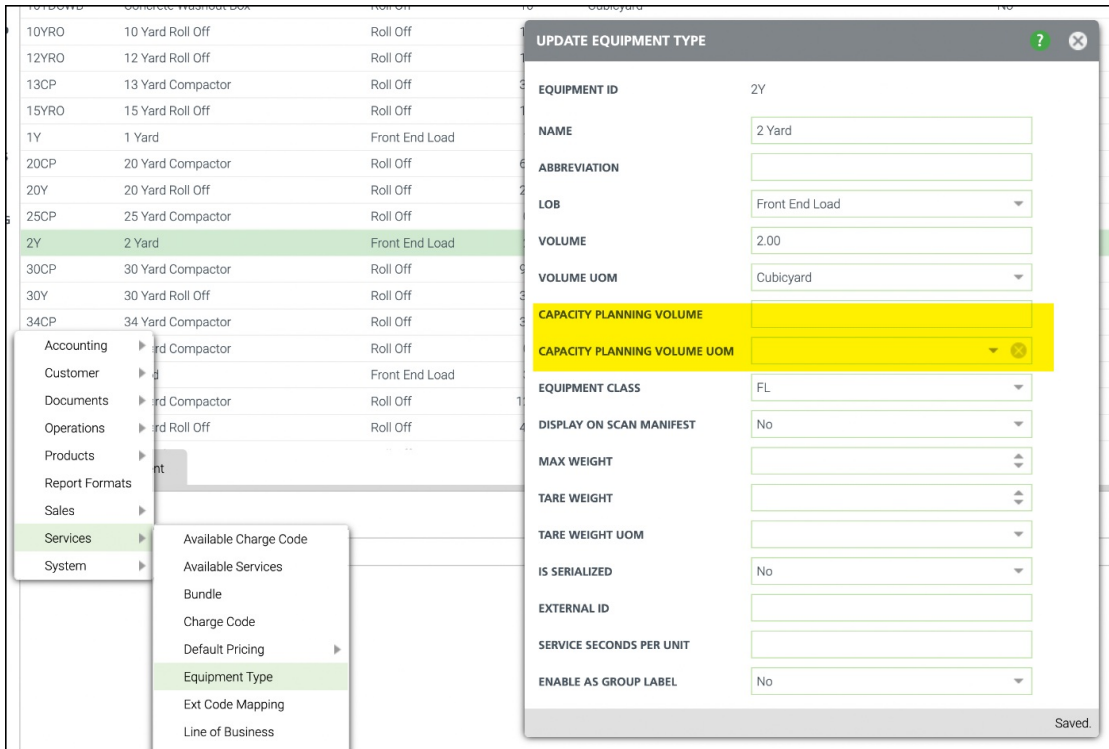
A new Key Path has been added to the Proposal notification template. When Proposal is selected for the template Type, 'gained\_or\_lost\_competitor' becomes an available option in the Key Path list.



Pathway: Setup > System > Notification Template

### Equipment Type (Services Setup)- Capacity Planning Volume UOM not saving (13889)

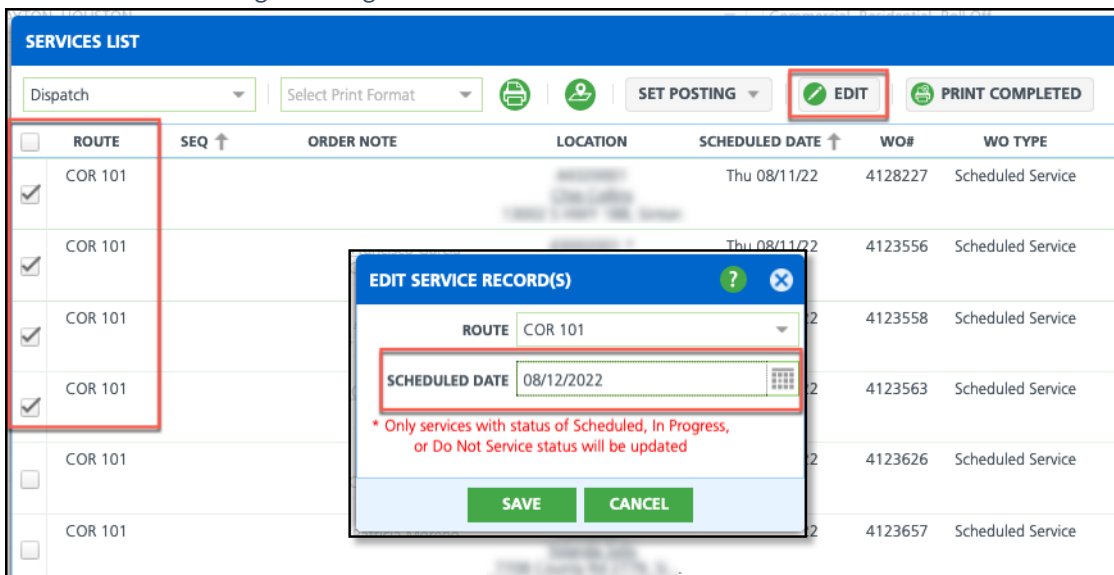
Previously, when a user tried to update the 'Capacity Planning Volume UOM' field in the Equipment Type setup editor, an error triggered and the field did not save. This has been fixed.



Pathway: Setup > Service > Equipment Type

### Dispatch - Reschedule Notifications Not Sending For Bulk Reschedules (11483)

When rescheduling multiple service records at the same time from the Services List in Dispatch, reschedule notifications were not generating. This has been fixed.



Pathway: Operations > Dispatch (Services List)