Release Version 65 [Archive]

Last Modified on 08/06/2025 7:55 am PDT

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.

4				/					• • •	0	D (2 0
	Pending	In Progress Post		Summary								
	AR PERIOD	Mar 2019 (10)	ТУРЕ	All	-				Search		Q, (3)	0
		Mar 2019 (10)		ID	ERRORS	AR PERIOD	DATE	COUNT	POS	TED BY		
HOME		Apr 2019 (22)		1000	Yes	2019-03	03/01/2019	2309	Navusoft 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	
\odot		Jun 2019 (19)		1056	Yes	2019-03	07/10/2019	3	Sandy Soto (Inactive) 07/10/2019	11:23 am	
CUSTOMER		Jul 2019 (38)		1057	Yes	2019-03	07/10/2019	2	Sandy Soto (Inactive) 07/10/2019	11:25 am	
Ø		Aug 2019 (60)		1058	Yes	2019-03	07/10/2019	2	Sandy Soto (Inactive) 07/10/2019	11:26 am	
DASHBOARD		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	
CALEC		Nov 2019 (111)		1061	Yes	2019-03	07/10/2019	2	Sandy Soto (Inactive) 07/10/2019	11:32 am	
JACLS		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	
OPERATIONS		Feb 2020 (333)										
		Mar. 0030 (107)										
ACCOUNTING												
REPORTS												
() SETUP												
DATABASE												

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.

CREDIT CARD EXPIRATION							
DIVISION	BILL GROUP	AUTO PAY	HAS ACTIVE SERVICES		Saavh	2	0.0
Al v	Al		AI *				4.0
EXPIRATION DATE	AUTO PAY	LAST FOUR	Al	LAST TRANSACTION	ACCOUNT	ACCOUNT STATUS	HAS ACTIVE SERVICES
12/31/2021 Expired	No	1260	Vesi	Approved \$90.95 on 10/04/2019	1304.100 VETS INC	Active	No
12/31/2021 Expired	No	1260	No	Approved \$90.95 on 10/04/2019	3304 100 VETS INC	Active	No
12/31/2021 Expired	No	1260	Visa	Approved \$90.95 on 10/04/2019	3304.100 VETS INC	Active	No
12/31/2021 Expired	No	1260	Visa	Approved \$90.95 on 10/04/2019	3304-100 VETS INC	Active	No
12/31/2021 Expired	No	1260	Visa	Approved \$90.95 on 10/04/2019	3304-100 VETS INC	Active	No
06/30/2022 Expired	Scheduled Day	0587	Mastercard	Approved \$0.00 on 01/10/2020	TROPICANA	Active	Yes
06/30/2022 Expired	Scheduled Day	0587	Mastercard	Approved \$0.00	3 ROPICANA	Active	Yes
06/30/2022 Expired	Scheduled Day	6587	Mastercard	Approved \$0.0	2880 TROPICANA	Active	Yes
06/30/2022 Expired	Scheduled Day	0587	Mastercard	Approved \$0.05 and a market	2880 TROPICANA	Active	Yes
09/30/2020 Expired	No	1533	Mastercard	Approved \$200.04 on 01/15/2020	6587 HENRY RINER	Active	Yes
03/31/2020 Expired	No	4868	Visa	Approved \$1,126.61 on 01/15/2020	19290 SARASOTA FIRE DEPARTMENT	Active	No
07/31/2020 Expired	No	2405	Visa	Approved \$90.95 on 01/15/2020	3058 MICHAEL TISDALE	Credit Hold	Yes
07/31/2020 Expired	No	2405	Visa	Approved \$90.95 on 01/15/2020	3058 MICHAELTISDALE	Credit Hold	Yes
07/31/2020 Expired	No	2405	Visa	Approved \$90.95 on 01/15/2020	3058 MICHAELTISDALE	Credit Hold	Yes
07/31/2020 Expired	No	2405	Visa	Approved \$460.36 on 01/15/2020	3058 MICHAELTISDALE	Credit Hold	Yes
07/31/2020 Expired	No	2405	Visa	Approved \$90.95 on 01/15/2020	3058 MICHAEL TISDALE	Credit Hold	Yes
07/31/2020 Expired	No	2405	Visa	Approved \$98.12 on 01/15/2020	3058 MICHAEL TISDALE	Credit Hold	Yes
07/31/2020 Expired	No	2405	Visa	Approved \$98.12 on 01/15/2020	3058 MICHAELTISDALE	Credit Hold	Yes
06/90/2021 Expired	No	2023	Mastercard	Approved \$37.96 on 01/21/2020	4213 RYAN MAINTENANCE	Active	No
06/90/2021 Expired	No	2023	Mastercard	Approved \$46.17 on 01/21/2020	4213 RYAN 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.

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																		? (
BATCH 10	281 DATE	05/04/2022		DIVISION	Clearwa	ater		BANK ACO	OUNT Cle	arwater 7	99 -	AMOUN	IT \$ 100.00		COUNT	1 S	TATUS	Posted
NOTE						CREATED B	Y: Navusoft	m - 05/04/	22 7:05 pm			POST	ED BY: Navus	soft m - 0	5/04/22 7	:10 pm		
Search for A	ccount/ Site				Q,	🛞 Doub	le click on sea	arch result to	o add payme	nt								
ACCOUNT ID	STATUS		BALANCE	ACCOUN	IT NAME				SITE ID		SITE I	AME				PR	EVIOUS	ID
																	0	
SORT Ent	ny Order ͗	15; v									Search	or Payme	nt in Batch				Q	
ORT Ent	ry Order ͗ NAME	15; *	s	TATUS		BALANCE	ТҮРЕ	ERE	FERENCE		Search ·	or Payme	nt in Batch APPLIEC AMOUNT	D NOTE		AUTO	Q	0
DRT Ent COUNT ID	ry Order ͗ NAME Kristina Car	15; 💌	S	TATUS Active		BALANCE \$ 71.85	TYPE	: RE	FERENCE		Search · AMC	or Payme	nt in Batch APPLIEC AMOUNT 0.00	D NOTE		AUTO APPLY	Q	. 🕲 (
ORT Ent	ny Order ͛ NAME Kristina Car	15; v	S	TATUS		BALANCE \$ 71.85	TYPE Cash	: RE	FERENCE		Search · AMC 10	ior Payme DUNT 0.00	nt in Batch APPLIEC AMOUNT 0.00	D NOTE		AUTO APPLY	Q	. 💿 🕻
CCOUNT ID	ry Order ͗ NAME Kristina Car	5; v	S	TATUS		BALANCE \$ 71.85	TYPE Cash	: RE	FERENCE		Search · AMC 10	or Payme	nt in Batch APPLIEC AMOUNT 0.00	D NOTE		AUTO APPLY	Q	. 💿 🤇
SORT Ent	ry Order ͛ NAME Kristina Car	npbell	S	TATUS		BALANCE \$ 71.85	TYPE Cash	: RE	FERENCE		Search 1	or Payme	nt in Batch APPLIEC AMOUNT 0.00	D NOTE		AUTO APPLY	Q.	sply

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.

2022 -	Sarasota		- O				Volded 1 \$ 0.00			
1		DIVISION	TYPE	IS MERCHANT	STATUS	5 DEPOSIT DATE	BANK ACCO	DUNT DEPOSI CLEARED D	IT COUNT DATE	
										? 😣
- F	BATCH 987	7 DATE 10/07/2021	DIVISION Sar	asota	BANK	ACCOUNT Sarasota	2175 - AMOUN	IT \$ 5,426.64 COL	JNT 4 STA	ATUS Posted
	NOTE			COL 4770 014	University University	(mather) 10/07	01 10 11 PO/W	70 mil		
	NOTE			CREATED BT:	UTIKI UTIKI	own(inacove) - ro/o//	2112.11pm Posts	ID 81:		
	Search for Ac	scount/ Site		Q 🛞 Double	click on search re	eault to add payment				
	ACCOUNT ID	STATUS BALA	INCE ACCOUNT N	AME		SITE ID	SITE NAME			PREVIOUS ID
	SORT Entry	y Order ↓ 🛛 🖛					Search for Payme	ent in Batch		Q 🛛 🚺
	SORT Entry	y Order ↓ *	STATUS	BALANCE	түре	REFERENCE	Search for Payme	APPLIED NOTE AMOUNT	AUTO APPLY	Q © 🗿
	SORT Entry ACCOUNT ID	y Order ↓ * NAME David Like New Construc	STATUS Credit Hold	BALANCE \$ 628.67	TYPE Credit Card	REFERENCE 63285821303	Search for Payme AMOUNT 237.35	APPLIED NOTE AMOUNT 237.35	AUTO APPLY	Q 🛞 🗿
-	SORT Entry ACCOUNT ID 27545 33703	y Order ↓ * NAME David Like New Construc Vasilly Andrashko	STATUS Credit Hold Active	BALANCE \$ 628.67 \$ 674.10	TYPE Credit Card Credit Card	REFERENCE 63285821303 63285332999	Search for Payme AMOUNT 237.35 165.85	APPLIED NOTE AMOUNT 237.35 165.85	AUTO APPLY	Q 🛞 🗿 Apply Apply
	SORT Entry ACCOUNT ID 27545 33703 33338	y Order ↓ NAME David Like New Construc Vasily Andrashko Sarasota County School	STATUS Credit Hold Active Credit Hold	BALANCE \$ 628.67 \$ 674.10 \$ 3,632.88	TYPE Credit Card Credit Card Credit Card	REFERENCE 63285821303 63285332999 63285197550	Search for Payme AMOUNT 237.35 165.85 4,913.75	APPLIED NOTE AMOUNT 237.35 165.85 4,913.75	AUTO APPLY	Q (2) (4) (4) (4) (4) (4) (4) (4) (4) (4) (4
	SORT Entry ACCOUNT ID 27545 33703 33338 4195	y Order ↓ NAME David Like New Construc Vasily Andrashko Sarasota County School MARK ESTES REMODELL.	STATUS Credit Hold Active Credit Hold Active	BALANCE \$ 628.67 \$ 674.10 \$ 3.632.88 \$ 659.48	TYPE Credit Card Credit Card Credit Card Credit Card	REFERENCE 632855821303 63285532999 63285197550 63285164874	Search for Payme AMOUNT 237.35 165.85 4,913.75 109.69	ent in Batch APPLIED NOTE AMOUNT 237.35 165.85 4,913.75 109.69	AUTO APPLY	Q, (2) (3) Apply Apply Apply Apply Apply
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	SORT Entry ACCOUNT ID 27545 33338 4195	y Order & Belloys, • • • • • • • • • • • • • • • • • • •	STATUS Credit Hold Active Credit Hold Active	BALANCE \$ 628.67 \$ 674.10 \$ 3,632.88 \$ 659.48	TYPE Credit Card Credit Card Credit Card Credit Card	REFERENCE 0.528592(1303 0.528552(399) 0.5285(14574) 0.5285(14674)	Search for Payme AMOUNT 237,35 165,85 4,913,35 109,99	ent in Batch APPLIED NOTE ARROWNT 23735 166.85 4913.75 109.69	AUTO	Q (1) (1) (1) (1) (1) (1) (1) (1) (1) (1)
	SORT Entry ACCOUNT ID 27545 33703 33338 4195	VORDE ABBOSS. * NAME David Like New Construct. Validy Andraichio Saranota County School MARK ESTES REMODELL.	STATUS Credit Hold Active Credit Hold Active	BALANCE \$ 628.67 \$ 674.10 \$ 3.632.88 \$ 659.48	TYPE Credit Card Credit Card Credit Card Credit Card	RFFERINCE 63285521303 63285532999 6328510/502 63285164874	Search for Payme AMOUNT 23735 16555 4,012.75 105.69	ent in Batch APPLED NOTE AMOUNT 237.35 165.85 4913.75 102.69	AUTO	Q (1) (1) (1) (1) (1) (1) (1) (1) (1) (1)

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.

OTIFICATION TEMPLATE SETUP				ł
TYPE Credit Card Expiration 👻				
NAME	DEFAULT SUBJECT TYPE CREATED BY SURVEY TYPE RESPONSE REQUEST TYPE ACT	IVE PREVIEW	PREVIEW	
Credit Card Expiration Notice	Credit Card Depiration Notice Credit Card Depiration test/html Do not use Ve	s <u>Preview</u>	Preview	
	TYPE Credit Card Explosition w MAME Credit Card Explosition holice ACTIVE His RESPONSE HIGUEST TYPE w	1		
	Enal Design Text Network Design DEGRANAT SURVEY Control Traffic Control Traffic Control Traffic			
	DEFAULT MESSAGE PREVIEW KEY PATHS Sharch Q (3)			
	Your @@oreditanthype; credit card ending with @@lastbourdigits; is set to expire on @@expirationdate; account.accountClass.name distriction			
	dato-dato account.bilgroup			
	003dv/sion.logs; chr/> account.billing4ddress.address.ine1			
	Objective on city, God vision state; dorb Deduction city, God vision state; dorb Deduction city, God vision state; dorb			
	Oddvision emailpubotic account billing/address city			
	account billingAddress postalCode			
	account oring/address same			
	account billingcontact name			
	account.bilingcontact2.email			
	account.bilingcontact2.name			
	account biling[mail			
	account.bilingPhone			
	account.id			
		11		

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.

		? 😣
BATCH 10282 DATE 05/18/2022 DIVISIO	N Sarasota BANK ACCOUNT Clearwater 799 - AMOUNT \$ 555.22 COUR	NT 1 STATUS Posted
NOTE	CREATED BY: Navusoft m - 05/18/22 4:47 pm POSTED BY: Navusoft m - 05/18/2	2 4:49 pm
Search for Account/ Site	Q 🛞 Double click on search result to add payment	
ACCOUNT ID STATUS BALANCE ACCO	UNT NAME SITE ID SITE NAME	PREVIOUS ID
SORT Entry Order ↓ * ACCOUNT ID NAME ST 2670 Ar	SELECT FILE Select file BROWSE PUED NOTE DUNT UND NOT IMPORT CANCEL UN-POST PRINT REPORT VOID IMPORT	Q ⊗ ⓓ AUTO APFLY APPLY

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.

AR HISTO	RY									
c	URRENT		1-30 DAYS	31-60 D	AYS		61-90 [DAYS	91-120	DAYS
	-70.35		0.00	115.7	9		0.0	0	0.0	0
	• <u>•</u> <u>•</u>	NVOICE A	UTO APPLY	BALANCE WRITE OFF	• CREDIT	CARDS	ON FIL	. <u>E(0)</u>		
DATE 🗍	DUE DATE	PERIOD	SITE ID		TYPE				REFERENCE N	0
07/01/22	07/01/22	2022-07			Invoice				906040	
03/31/22	03/31/22	2022-03			Invoice		[±]	View Details /	Adjust Invoice	
07/13/21		2021-07			Payment - C	heck	*	Add Custome	r Request	
							\bowtie	Email		
							A	Print		
							C	Reverse		

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.

CUMERAT 1-30 DAYS 1-40 DAYS 61-90 DAYS 91-120 DAYS 120-DAYS 120-DAYS TOTAL 0.00 0.00 0.00 0.00 0.00 0.00 1.666.53 1.666.53 UMM TT OFORM FIRST V INVOIC AUTO AFFY BALENCE MO STEED Secth Q 0.01/12 0.01/2 2022-03 226503 Invoice 576275 304.95 304.95 0.01/12 0.01/2 2021-02 226603 Invoice 576276 369.15 304.95 1091/2 1091/21 1091/21 2021-02 2266002 Invoice 576276 369.15 304.95 1091/21 1091/21 1091/21 1091/21 1091/21 1091/21 1091/21 2021 XetGood XetGood XetGood 1091/21 1091/22 2021 XetGood	AR HISTO	DRY													? 😣		٦.
0.00 0.00 0.00 0.00 0.00 1.606.93 1.606.93 1.606.93 UMIT TO OPHI FIRMS Image: Statement Y Image: Statement Y <thimage: statement="" th="" y<=""> Image: Statement</thimage:>		URRENT		1-30 D	AYS		31-60 DA	rs		61-90 DAYS	91-120 DAYS	120+	DAYS		TOTAL	1	
INIT TO OPEN ITINS Image: California and and and and and and and and and an		0.00		0.00)		0.00			0.00	0.00	1,60	6.93		1,606.93		
DATE ↓ DUE DATE FERDO STFE ID TYPE REFERENCE NO AMOUNT APPLIED AMOUNT BALANCE 0371/22 0231/22 0224-03 3266003 Imvoice 572118 218.09 218.09 218.09 0371/22 01/31/22 2022-01 3266003 Imvoice 876237 304.95 304.95 01/31/22 01/31/22 2022-01 3266002 Imvoice 876236 369.15 309.15 01/31/22 01/31/21 2021 3266002 Imvoice 876236 369.15 309.15 01/31/21 10/31/1 2021 Imvoice 876236 369.15 369.15 01/31/21 10/31/1 2021 Imvoice 876236 369.15 369.15 01/31/21 10/31/1 2021 Imvoice 876236 369.15 369.15 01/31/21 10/31/21 2021 Imvoice 876236 369.15 369.15 01/31/21 10/31/21 10/31/21 10/31/21 10/31/21	LIMIT TO 0	OPEN ITEMS	\checkmark	STATE	MENT -	<u>B</u> INV		JTO APPLY	BALA	NCE WRITE OF	CREDIT CARDS ON FILE			Search	Q. 😒		
03/91/22 02/91/22 02/20/3 3266002 Invoice 67/8118 216.09 216.09 03/91/22 02/20/23 3266002 Invoice 67/9177 264.04 224.04 01/91/20 01/91/22 02/20/23 3266002 Invoice 67/927 30.49.5 369.15 369.15 01/91/22 01/91/22 02/91/22 02/91/22 02/91/22 3266002 Invoice 67/927 30.49.5 369.15 369.15 01/91/21 10/91/21 10/91/22 02/91/22 02/91/22 02/91/22 02/91/22 10/91/21 10/91/21 10/91/21 10/91/21 10/91/21 10/91/21 10/91/21 10/91/21 10/91/22 10/91/22 10/91/22 10/91/21 10/	DATE 🗍	DUE DATE	PERIO	D SITE ID				ГҮРЕ			REFERENCE NO	AMOUNT	APPLIED AM	OUNT	BALANCE		
0931/22 022-03 3266002 Invoice 678117 264.04 264.04 01/12/12 01/31/22 022-01 3266002 Invoice 876257 304.95 304.95 01/31/22 022-01 3266002 Invoice 876257 304.95 306.15 01/31/21 10/31/21 2021 3266002 Invoice 876257 304.95 306.15 01/31/21 10/31/21 2021 3266002 Invoice 876257 304.95 369.15 01/31/21 10/31/21 2021 2021 Invoice 876257 304.95 369.15 01/31/21 10/31/21 2021 2021 Invoice 876257 304.95 369.15 01/31/21 10/31/21 2021 Invoice 876257 304.95 369.15 369.15 01/31/21 10/31/21 2021 Invoice 876257 304.95 369.15 369.15 01/31/21 10/31/20/21 10/31/20/21 Invoice 876257 304.95 369.15 369.15 01/31/20/21 10/31/20/21 10/31/20/21<	03/31/22	03/31/22	2022-	-03 326600	3			Invoice			878118	218.09			218.09	_	
01/31/22 01/31/22 2022-01 3266002 Invoice 876237 304.95 304.95 01/31/22 023/012 0222-01 3266002 Invoice 876236 369.15 369.15 09/31/21 109/31/2 0222-01 3266002 Invoice 876236 369.15 369.15 09/30/21 00/31/20/22 Invoice 800/20/20/20 Taxes 09/30/21 09/30/21 09/30/21 09/30/22 1 Standard Toilet Service \$115.00 \$0.00 \$8.05 326600/2 06/01/22 0/31/22 1 Standard Toilet Service \$115.00 \$0.00 \$8.05 326600/2 06/01/22 0/31/22 1 Standard Toilet Service \$115.00 \$0.00 \$8.05 326600/2 06/01/22 0/31/22 1 Standard Toilet S	03/31/22	03/31/22	2022-	-03 326600	2			Invoice			878117	264.04			264.04		
013122 013122 2222-01 3266002 Invoice 876236 369.15 369.15 103121 103121 2221 CREATE CUSTOMER INVOICE CREATE CUSTOMER INVOICE	01/31/22	01/31/22	2022-	-01 326600	3			Invoice			876297	304.95			304.95		
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GENERATE INVOICE																	
GENERATE INTOICE											GENERATE INVOICE						

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.

EDIT PORTAL USER		?	8
Details Login History			
ID	LOGIN TIME		
1018	06/29/22 10:30 am		
1		_	

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 B	ATCH		?	8
DESCRIPTION	test			
TARGET TABLE	Account		Ŧ	
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.

Search	Q, 🛞	
	-	-

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.

Notification History	Ema	il Block List							
DIVISION		DATE	START DATE	END DATE	NOTIFICATION TEMPLATE TYPE	DELIVERY STATUS	SENT BY	TYPE	TO EMAIL
All	*	Custom Range 🛛 👻	06/06/202	07/12/202	All 👻	All 👻	All 👻	All 👻	LOAD
SENT ON 👃		FROM	4		то			DELIVERY ST	TATUS DIVISION
07/11/22 12:38 pm 69340								Delivered	
07/11/22 12:38 pm 69341					matti Matt 2811 Navu	new@navusoft.com new Van Doren 1 soft - 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					matt Matt 2811 Navu	new@navusoft.com new Van Doren 1 soft - 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		mati Navi	hew@navusoft.com usoft.m		matt Matt 3436 Peon	new@navusoft.com new Van Doren 0001 <u>y & Crane</u>		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			DESTINATION AII		STATUS	▼ LOA	Search	Q, (8)	18297 / 6833.15 lb(s)	
ID	SHIP DATE	STATUS 🕇	SOURCE	TRANSPORTER		NAL ID	NOTE	COUNT	WEIGHT LBS	TRANSFER WO #
2486		Open			Open			0	0.00	
1630	04/27/2021	Posted			Posted			615	6,833.00	
1898	10/13/2021	Posted			C Voided			660	9,379.00	
2151	02/01/2022	Posted			E Shipped			696	11,445.00	
2186	02/08/2022	Posted			E Ready t	o snip		581	7,637.00	
2354	04/19/2022	Posted		The second second second second				608	11,508.00	
1803	08/24/2021	Posted					Lease Truck	563	7,258.00	
2116	01/19/2022	Posted						743	12,226.00	
2279	03/22/2022	Posted						692	11,164.00	
1991	11/23/2021	Posted						723	11,611.00	
1823	08/31/2021	Posted						475	6,985.00	
2387	05/03/2022	Posted						591	10,222.00	
1669	06/09/2021	Posted					Lease Truck	539	7,626.00	
2231	03/01/2022	Posted						687	11,142.00	
2420	05/12/2022	Posted		1000				600	11,383.00	
1755	08/10/2021	Posted		The second se				482	8,107.00	
1936	10/26/2021	Posted						614	9,455.00	
1963	11/09/2021	Posted						575	10,280.92	
2319	04/05/2022	Posted						725	12,326.00	
2024	12/02/2021	Posted	1000					317	7,720.00	
2043	12/21/2021	Posted						712	11,538.00	
2090	01/04/2022	Posted		The second se				727	12,325.56	
1867	09/28/2021	Posted						660	9,670.00	
2205	02/15/2022	Posted		1000 Contract (1010)				658	11,360.00	
1659	05/19/2021	Posted					Lease Truck	333	5,628.00	
1692	06/30/2021	Posted	1000			Lease Truck		530	7,708.00	
1644	05/10/2021	Posted						431	4,931.00	
1721	07/20/2021	Posted						528	6,859.00	
2258	03/08/2022	Posted						607	9,074.00	
1614	04/05/2021	Posted		The second se				355	4,417.00	
1839	09/14/2021	Posted						584	9,243.00	
1791	08/10/2021	Voided						0	0.00	
2447	08/04/2022	Shipped						495	9,623.00	
1623	04/14/2021	Ready to Shin		THE REPORT OF THE	TTHE WAY BARRIES		Lesse Truck	101	2 576 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).

FUEL SOURCE SETUP	
U	
ID T NAME OWNER	HIP ADDRESS
1000 Valero Externi	1544 N Shepherd Dr Houston, IX //008-3/56
ADD FUEL SOURCE	2 🛛
NAME	
OWNERSHIP	v v
ADDRESS LINE 1 Enter a locati	n
ADDRESS LINE 2	
CITY/SIATE/POSIAL CODE	
PHONE NOTE	DRIVER PATHOL LOG IN PRETRIP FIRST LUNCH LUNCH LUNCH LAST TRUCKAMLEAGE PU CLOCK IN SERVICE START START START
	110%
	SA Kenneth FUEL RECORD 2 😵
	Kelvin C
	Damy Jo
	Chris He Rohert 7 02-3004 Valero Diesel Gallon 5.23 08/16/2021 Aliena So
	Bill Ranc
	Hector R
	Edward
	lyer zan Daniel A
	Troy Van
	DanyLlo
	SAVE CANCEL

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.

ROUTE DISPOSAL	RECORDS									? 😣
										•
DATE	TIME	LOCATION	WORK ORDER #	TICKET #	QUANTITY	UOM	MATERIAL	TOTAL COST	VEHICLE ID	
Thu Jul 14, 2022	4:33 pm	Rev Marries Topola	3544370	1234	5.96	Ton	Class III	\$ 327.80		0 0
1										
				_	_					
				c	LOSE					

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						
Ð	LOB	All	EQUIPMENT TYPE	All	▼ MATE	RIAL TYPE All	v	
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
FL02R		2 Yard Recycle Service		Commercial	2 Yard FL	Recycle	Month	Yes
RL02R		2 Yard Recycle Service		Residential	2 Yard RL	Recycle	Month	Yes
FL02T		2 Yard Trash Service		Commercial	2 Yard FL	MSW	Month	Yes
RL02T		2 Yard Trash Service		Residential	2 Yard RL	MSW	Month	Yes
FL02VIPR		2 Yard VIP Recycle Service		Commercial	2 Yard FL VIP	Recycle	Month	Yes
FL02VIPT		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.

Image:	NOTIFI	CATION TEMPLATE SET	UP					
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1 Image: stands lands			ADD NOTIFICATION TEMPLATE					
12 YP YP Pool VAR ACTIVE YP YP VAR (PACH) Rathell	51						text/html	Navi
3	52		TYPE Proposal - NAME		ACTIVE Yes 👻	rvice Agreement	text/html	Navi
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38	57		DEFAULT MESSAGE	PREVIEW	KEY PATHS lost	Q. (8)	text/html	Mich
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	50			Portal Invitation		Customer Portal Notification	text/html	Navi
2 Onion Waste Solutions Proposal for your review Proposal / Service Agreement textmtmil Nat	2			Orion Waste Solutions Proposal for you	review	Proposal / Service Agreement	text/html	Navi

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.

10YR0	10 Yard Roll Off	Roll Off	UPDATE EOUIPMENT TYPE			
12YRO	12 Yard Roll Off	Roll Off			-	•
13CP	13 Yard Compactor	Roll Off	EQUIPMENT ID	2Y		
15YRO	15 Yard Roll Off	Roll Off				
1Y	1 Yard	Front End Load	NAME	2 Yard		
20CP	20 Yard Compactor	Roll Off	ABBREVIATION			
20Y	20 Yard Roll Off	Roll Off 2	LOP	Front End Load		
25CP	25 Yard Compactor	Roll Off	LOB	Front End Load		
2Y	2 Yard	Front End Load	VOLUME	2.00		
30CP	30 Yard Compactor	Roll Off	VOLUME UOM	Cubicyard		
30Y	30 Yard Roll Off	Roll Off 3				
34CP	34 Yard Compactor	Roll Off 3	CAPACITY PLANNING VOLUME			
Accounting	rd Compactor	Roll Off	CAPACITY PLANNING VOLUME UOM	- 0		
Customer	►d	Front End Load	FOUIPMENT CLASS	El 🗸	7	
Documents	Ind Compactor	Roll Off 1	Equilibrium CERUS			
Operations	▶ ⊧rd Roll Off	Roll Off	DISPLAY ON SCAN MANIFEST	No		
Products	▶ nt	8 - 18.	MAX WEIGHT	÷		
Report Forma	ats		TARE WEIGHT			
Sales	>		TARE WEIGHT			
Services	Available Charge Code		TARE WEIGHT UOM	-		
System	Available Services		IS SERIALIZED	No		
	Bundle					
	Charge Code		EXTERNAL ID			
	Default Pricing		SERVICE SECONDS PER UNIT			
	Equipment Type		ENABLE AS GROUP LABEL	No		
	Ext Code Mapping					
	Line of Business				1	Saved.

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.

SER	SERVICES LIST							
Dis	patch	 Select Print Format Set POSTING Set POSTING EDIT PRINT COMPLETED 						
	ROUTE	SEQ T ORDER NOTE LOCATION SCHEDULED DATE WO# WO TYPE						
	COR 101	Thu 08/11/22 4128227 Scheduled Service						
	COR 101	Thu 08/11/2 4123556 Scheduled Service EDIT SERVICE RECORD(S) ? Service						
	COR 101	ROUTE COR 101 2 4123558 Scheduled Service						
	COR 101	SCHEDULED DATE 08/12/2022 12 4123563 Scheduled Service * Only services with status of Scheduled, In Progress,						
	COR 101	or Do Not Service status will be updated 2 4123626 Scheduled Service						
	COR 101	2 4123657 Scheduled Service						

Pathway: Operations > Dispatch (Services List)