Release Version 66 [Archive]

Last Modified on 08/06/2025 7:56 am PDT

The release notes in this article correspond to version 66. Screens and logic may have changed in newer versions.

Portal

Account Portal - Account Portal Updated to Reflect Currency Code Selected in NavuCore (14122) [Enhancement]

An update has been made to Account Portal to use the currency code selected in NavuCore under Setup > System > System Options > Currency field.

System	Sales	Integration	Account	Operations	
ENVIRON	MENT				
DIVISION	LABEL	Division			
EXTERNA	L ID LABEL	Old ID			
SITE CLAS	S LABEL	Site Class			
AUTO REF	RESH TIME	2			\$
FAST AUT	O REFRESH TIME	1			\$
TIME ZON	IE	Central Sta	andard Time		-
CURRENC	Y	US Dollar			•
LOCALE		United Sta	tes (English)		-

Pathway: Setup > System > System Options

Accounting

Billing – Logic Updated for Auto Pay Batch Processing to Prevent Duplicate Batches (13986) [Enhancement]

To prevent duplication of Auto Pay batches, the following enhancements have been made:

- 1. Process Auto Pay Now:
 - Once started, the 'Process Auto Pay' right click option no longer displays unless there is an interruption that requires finishing auto pay again.
- 2. Process Auto Pay on a Specific Date:

• 'Process Auto Pay' will not display as a right-click option after the 'Process Auto Pay on a Specific Date' has started. Instead, 'Auto Pay Already Processed' displays.

Pending a	and In Process History					
DIVISION	All					
	BILL GROUP	DIVISION	BATCH ID	TYPE	STATUS	INVOICE I
		Sarasota				
			7521 🙂	Billing Analy	sis	
	Clearwater Monthly Advance		7573 🙂	View Details		
	Municipal			Edit Massag		
				Edit Message	Consolated	
	Clearwater Residential Monthly	Clearwater	7538 😨	Mark Batch	Completed	
	learwater Res Quarterly Advance	Clearwater	7572	Auto Pay Alr	ready Processed	10/01/20
				Un-Post		
				Export		
				Print Paper I	nvoices	
				Print All Invo	pices	
				Print Emailed	d Invoices	
				Send Notific	ations	
				·		

Pathway: Accounting > Billing

Billing - Multiple Enhancements to the Billing Screen (14092)[Enhancement]

The following enhancements have been made to the **Billing** screen:

- 1. The Date field has been modified to display as 'Invoice Date'.
- 2. A new column:'From-To Date', has been added to display the Bill From Date and Bill To Date for the invoice.
- 3. *Edit Batch* has been added as an available option for batches in a 'Not Started' status (refer to the on-screen Status column). NOTE- only Invoice Date, Bill From Date and Bill To Date can be edited

Pending an	id In Process Histo	ry									
DIVISION	All	v									
	BILL GROUP		DIVISION	BATCH ID		ТҮРЕ	STATUS	INVOICE DATE		FROM-TO DATE	INVOICE COUNT
	NO BILL		Clearwater	7520		Scheduled	Posted	04/20/2022	04	/01/2021 - 04/30/2022	1
	Sarasota Portolets		Sarasota	7560		Scheduled	Posted	09/01/2022	08/01/2022 - 08/31/2022		43
	Sarasota Advanced		Sarasota	7569		Scheduled	Processed	09/01/2022	09	/01/2022 - 09/30/2022	1
	Orlando Arrears		Orlando	7581		Scheduled	Processed	09/01/2022	09	/01/2022 - 09/30/2022	5
C	learwater Monthly Advan	ce	Clearwater	7521	-	Scheduled	Posted	12/01/2021	12	/01/2021 - 12/31/2021	484
C	learwater Monthly Advan	ce	Clearwater	7573	Ξ	Scheduled	Processed	10/01/2022	02	/01/2022 - 02/28/2022	202
	Municipal		Oldsmar	7571		Scheduled	Processed	11/30/2021	11	/01/2021 - 11/30/2021	500
	DEMO		Training Division	7515		Off Scheduled	Posted	03/10/2022	03	/01/2022 - 03/10/2022	
Cle	earwater Residential Mont	thly	Clearwater	7538		Scheduled	Not Started	08/16/2022	08	/01/2022 - 08/31/2022	
Clea	arwater Res Quarterly Adv	ance	Clearwater	7572		Scheduled	Not Started	Edit Batch	ŝ	01/2022 - 08/31/2022	
	DEMO		Training Division	7505		Off Scheduled	Posted	Edit Message		01/2021 - 12/31/2021	
	EDIT BILLING BAT	сн					? &	Pre-Billing			
	DIVISION	Clearwater						Void		ļ	
	BILL GROUP	Clearwater Residential	l Monthly / Monthly / Ad	vance / Clearwater							
	ТҮРЕ	Scheduled		These field	ls ca	n only					
	INVOICE DATE	08/16/2022		be edited Status is: N	d if ba lot S	atch tarted.					
	BILL FROM DATE	08/01/2022									
	BILL TO DATE	08/31/2022									
			EDIT BATCH								

Pathway: Accounting > Billing

Billing Batch - Logic Updated to Default Dates for Manually Created Batches (14149)

Logic has been updated to the default dates that populate the 'Bill To Date' and 'Bill From Date' fields in the Create Billing Batch tool.

Bill From Date - defaults to the date that is one day after the date in the 'Bill To Date' field of the last billing batch. Otherwise, the first day of the month is used if a prior billing batch is not found.

Bill To Date - default date looks at the date in the Bill From Date field and includes additional logic based on the billing frequency to calculate (Example: Monthly, Every 2 Weeks, and etc.).

CREATE BILLING	ВАТСН	?	8
DIVISION	Houston 👻 🛞		
BILL GROUP	Houston RES Biweekly / Every 2 Weeks / Advance / Houston	•	
ТҮРЕ	~		
INVOICE DATE	10/21/2022		
BILL FROM DATE	10/17/2022		
BILL TO DATE	10/30/2022		
	CREATE BATCH CANCEL		

Pathway: Accounting > Billing > Create Billing Batch

Billing - Logic Updates to Billing Batch (14091)[Enhancement]

Logic has been updated to the automatic frequency of creating a new batch after a batch was marked 'Complete'. The following frequencies are supported:

- Monthly
- Weekly
- Daily
- Every 4 Weeks
- Quarterly
- Bi-Monthly
- Semi-annual

'From' and 'To' date fields for auto-generated batches are determined using the previously completed billing batch.

Pathway: Accounting > Billing

Billing Inactivity Fees - Option to Print Invoice Available (14056)[Enhancement]

The **Billing Inactivity Fees** screen has been updated to include a print option. Select the print icon and the invoice will open in a new tab in PDF format.

An error screen displays if print is selected and no invoice was created (indicated if Invoice ID is '0').



Pathway: Accounting > Billing > Charges Screen

Customer Service

Tasks - Task Created By Text (13997, 14107)

Logic has been updated to the 'Created By' field for system generated tasks (tasks created when a customer text is received) to display 'Navusoft Systems'.

EDIT TASK				? 8
ID 9894 CREATED BY Na	ivusoft System 09/15/2022 11:33 am	AD	D ATTACHMENT	
TOM BROWN 777 LUCKY LANE PALM HARBOR, FL 34683	CONTACT		(777) 777 777	(mobile)
ТҮРЕ	ASSIGNED TO	PRIORITY	DUE DATE	(mobile)
Customer Support (Operations)	Mimi Howard (Sales)	Medium 👻	09/16/2022 Fri	
REPEAT None Auto Notify By	y email 🗹 text n	MESSAGE 🗹		
NOTE				
TEXT MESSAGE FROM CONTACT: Text just to test getting it TEXT MESSAGE FROM CONTACT:				
COMPLETION NOTE				
COMPLETE?				
				•
USER	DATE	NOTE	N	OTIFY CONTACT
	SAVE CANCEL	DELETE		

Pathway: Tasks (Icon); Tasks (Calendar Event)

Calendar - Option to Hide/Display Rental Fee (14062)[Enhancement]

'Rental Fee' has been added as a selection option to the Calendar Event drop down for an Account's calendar. Select 'Rental Fee' and any rental fees for the account will display on the calendar. Remove the selection and rental fees will be hidden from calendar view.

^	ACTIVE	SERVICES (4)	Standard 👻		• <			
	QTY	SERVICE CODE						
+	1	6 Yard Trash S	ervice					
+	1	250 Gallon ho	olding tank					
+	1	10 Yard Aspha	alt Service					
+	1	15 Yard Waste	e Service					
	CALEND	AR 📃 🔇	September, 20		CALENDAR EVENT	Rental Fee	-	
		S	UN					
				Aug 2	.8	AR AR		
						Service Records		
					\rightarrow	🔽 Rental Fee		
						Service Changes		
						System		
				Sep	4 Labor Day	Appointment		
						Cancellation		
						Complaint		
						🔲 Email		
						Note		
				Sep 1	1	Task		
				- clo .		Tauk Massage		
_								

Pathway: Accounts > Search (Accounts) > Calendar

Account Calendar - Holiday Schedule Displays on Account Calendar (13983)[Enhancement]

An enhancement has been made to display scheduled holidays on the account's calendar. Holidays are added in *Setup* > *Operations* > *Holiday Schedule*. If a date includes more than one holiday, only the first holiday will display on the calendar in the upper left corner in blue font. Hover over the name of the holiday to display any notes it includes. In addition, the cell for the date in the calendar the holiday is on displays in red.



Pathway: Accounts > Account > Calendar (Section); Setup > Operations > Holiday Schedule

Blanket Purchase Orders - New Tool Available in Account Attachments (14035)[Enhancement]

Create a **Blanket Purchase Order** for an account to bill recurring services, manual charges and on call orders to. Blanket Purchase Orders can be limited to a specific site under the account, or be made available to all sites. After a Blanket PO has been created, the option to delete will be unavailable if any records are linked to it. Use the **Blanket PO Management** tool under the Accounts module to view all Blanket PO's for all accounts.

262	7	Navusoft, LLC											2757	Navuso	ft, LLC
		Parent Account 8100 Washington Avenue Houston, TX 77007				Active DIVISION ACCOUNT MGR CLASS BILL GROUP	Saraso Navus PERM Saraso	ota xoft m ota Arrears					1 of 3 (2) (2) (2) (2) (3) (4) (4) (4) (4) (4) (4) (4) (4	Site 811 Ho (71	00 Washington Avenu uston, TX 77007 3) 897-9558
0	0	CURRENT	1-30		31-60	61-90		91-120	12	0+	TOTAL				
		0.00	PHOTOS, ATTA	ACHMENTS, PUR	CHASE ORD	ERS AND WASTE PRO	FILES		14				?	8	
	IGHTS On call	service no activity since 1/28/20	Photos 3	Attachments	Blanket Pu	rchase Orders 🚺 🛛 Wa	ste Profile				Add N	lew			09/13/
0	On call	service no activity since 1/28/20								D	Dian			0	08/19/
0	On call	service no activity since 1/28/20			NUNT AMO			END DATE	NOTE		urchase			· ·	09/21/
••	On call	service no activity since 1/28/20	PONOMBER	ANG	JONI AMOU	TO DATE		END DATE	NOTE	CREATED DATE	G	CATED BT			
<u></u>	ACTIV	E SERVICES (4) Standard	878	\$ 20	0.00	\$ 0.00 10/03/2022				09/26/2022 3:39	pm A	liena Somers		•	
H H H H	QTY 1 1 1 1 CALEN	SERVICE CODE 6 Yard Trash Service 250 Gallon holding tank 10 Yard Asphalt Service 15 Yard Waste Service DAR E September, SUN													g 31
			Sep 4			Sep	5			Sep 6				S	ep 7

Pathway: Accounts > Search > Account Screen > Attachment Icon Articles: Blanket Purchase Orders, Blanket PO Management, Video-Blanket Purchase orders

Database

Request Audit - Screen Modifications and Response Code Filter Added (14003)[Enhancement]

The following enhancements have been made to the Request Audit screen:

- Upon entry, the tool will default to display a blank screen. Results will load once selections have been made using the filter drop down options at the top.
- Addition of 'Response Code' filter. Only one response code may be selected at a time.
- Logic updated to the Response Code column to display the name of the response code. Previously this displayed as a numeric value.
- Logic updated to the screen display for response codes that are not *Success*. If the Response Code is not *Success*, the entire row and any subsequent rows will be highlighted red.

REQUES	TAUDIT							
USER	AJ Wilson (Inactive	, Alfred P 👻 RESPONSE CO	All 👻	WITHIN LAST Last 30 days 👻				Search Q 🛞 📢
ID	TIMESTAMP	END TIMESTAMP	USER	REQUEST PATH	STATUS	SESSION ID	IP ADDRESS	RESPONSE CODE
		"escautoprocess": 2, "rodisp "billstate": "TX", "billzip": "customerportalbatchcreati	oosalrevenuepercent": 0, *lo "77007", "enablecreditcard oncutoff": "18:00:00", "sen	gourl*: "https://s3-us-west-2.amazonaws.com/nv- processing": 0, "creditcardbankaccountId": 1002, icenotificationfromemail*: "Ops@navusoft.com"	bobcat/orionlogo_5.png", "credito "latitude": 29.781768, "longitude", "customerportalpastduetext": "Pl	ardgateway": 2, "gatewayEnv": 0, "gatewayApikey": " : -95.434789, "email": "support@navusoft.com", "paym ease pay your bill", "timezone": "Central Standard Tim	123", "gatewayTransactionkey": " 12 entportalurl": "myaccount.navusoft.r e", "declinedpaymentnotificationtem	a", "billaddressline1": "P.O. Box 12345", "billcity": "Houston", net", "paymentreceiptemailtemplateld": 64, plateld": 69 })
4185919	Sep 28, 2022 1:17	pm Sep 28, 2022 1:17 pm	Lori Sheldt	/report/workorders/DOC_SHRE	MANIFES	975E2449-E01C-45F6-BEB1-F43C	812EE9EE 208.102.243.43	Success
4185918	Sep 28, 2022 1:15	pm Sep 28, 2022 1:15 pm	Lori Sheldt	division/1002		975E2449-E01C-45F6-BEB1-F43C	812EE9EE 208.102.243.43	Success
		{ "com.shift2right.vo.Divisio "divisionGroupId": 1000001 "32824-8132", "enablecredi	nVo": { "id": 1002, "name" , "escautoprocess": 0, "rodi itcardprocessing": 0, "latitu	"Orlando", "legalname": "Russo and Sons, LLC", posalrevenuepercent": 0, "logourl": "https://s3-u le": 28.429329, "longitude": -81.383632, "email"	*addressline1*: *481 Thorpe Rd*, s-west-2.amazonaws.com/nv-bobca *XXXXXXXXXXX@orionwaste.com*	"city": "Orlando", "state": "FL", "zip": "32824-8132", t/orionlogo_5.png", "creditcardgateway": 0, "gateway , "paymentportaluri": "www.orionwaste.com", "payme	"dbaname": "Orion Waste Solutions", Env": 0, "billaddressline1": "481 Thor entreceiptemailtemplateId": 64, "cust	, "enableintegration": 0, "mainphone": "+14079059200", pe Rd", "billcity": "Orlando", "billstate": "FL", "billzip": omerportalbatchcreationcutoff": "18:00:00",
4185917	Sep 28, 2022 1:04	pm Sep 28, 2022 1:04 pm	Lori Sheldt	/reports		3CBD7CE9-85F2-4753-8B62-3BF	97E3A7318 208.102.243.43	Bad Request
4185916	Sep 28, 2022 12:5	5 Sep 28. 2022 12:55	Navusoft	division/1001		6436525E-047A-4FF9-B16D-5170	0E7868FB 98.114.9.139	Success
		{ "com.shift2right.vo.Divisio "+18888888888", "escautop "enablecreditcardprocessing	nVo": { "id": 1001, "name" process": 0, "rodisposalrever p": 0. "latitude": 28.429329.	"Training Division", "legalname": "Training Divi uepercent": 0, "logourl": "https://s3-us-west-2.ar "longitude": -81.383632. "email": "XXXXXXXXX	sion", "addressline1": "7247 Delain nazonaws.com/nv-bobcat/orionlogo X@orionwaste.com", "paymentpor	ey Court", "city": "Lakewood Ranch", "state": "FL", "z o_5.png", "creditcardgateway": 0, "gatewayEnv": 0, "bi talurl": "www.orionwaste.com", "paymentreceiptemai	ip": "34240", "dbaname": "Orion Wa illaddressline1": "481 Thorpe Rd", "bi Itemplateld": 64. "customerportalbat	ste Solutions", "enableintegration": 0, "mainphone": illcity": "Orlando", "billstate": "FL", "billzip": "32824-8132", chcreationcutoff": "18:00:00", "servicenotificationfromemail":

Pathway: Database > Request Audit

Operations

Dispatch - Add/ Edit Payroll Hours in Route Productivity (14162)[Enhancement]

Logic has been updated to the Payroll Clock In/Clock Out fields in Dispatch (Route Productivity view) to allow for adding and editing hours. A '?' displays when no time has been clocked for the employee.



Pathway: Operations > Dispatch > Route Productivity (view)

Manifest Consolidation - 'Transfer Transporter' Field Relocated (14004)[Enhancement]

The **Transfer Transporter** field located in Setup > Operations > Route (double click to open) and Operations > Dispatch > Edit Route (double click to open) has been moved to the Manifest Consolidation screen in Operations. To access the field, right-click within the line item and the Manifest Consolidation Batch popup editor will display. Click on the Transporter drop down field and a list of transfer transporters will display. Select the transporter that applies. Additional information about the Transporter field and its role in the Manifest Consolidation process can be found in the *Prepare Open Batches* article attached below.

SOURCE	All	DESTINATION	All	~	STATUS	Open 👻	LOAD	Search	Q, (8)	5275 / 3226.04 lb(s)
ID	SHIP DATE	STATUS	SOURCE			TRANSPORTER		DESTINATION		EXTERNAL ID
2191		Open Rig	ht-click Murray	Medwaste SE- Co	lumbus, GA	Murray MedWaste SE	- Orlando	Murray MedWa	aste SE- Orlando	
2314	08/26/2022	Open	Murray	Medwaste West-	Fresno 703	Healthwise Services		Healthwise Ser	vices	
2492	09/01/2022	Open	Murray	Medwaste West-	Escondido	Murray Medwaste W	est- Vernon	Murray Medwa	aste West- Vernon	2450
1962		Open	Murray	MedWaste SE-Ch	arlotte	Branton		Branton- Maryl	and	
2313		Open	Murray	//www.weither.codi #	702			Murray Medwa	aste West- Fresno	703
1523		Open	Murray	/ledWaste SE-Sav	annah			Clean Earth		
2464		Open	Murray	vledWaste West -	SLC # 780			Diversified Was	te Management	
2493		Open	Murray	Medwaste SE-Et	Mvers			Murray MedWa	aste SE- Orlando	
2263		Open	Murray	MedV MANIFE	ST CONSOL	IDATION BATCH		🛞 əvanta - Flori	da	
2441		Open	Murray	ViedV				edAssure-Ka	nsas	
2456		Open	Murray	Viedvi source		1053	*	ragon Medic	al	
2229		Open	Murray	ViedV				urray MedWa	aste West-Phoenix	#710
2476		Open	Murray	Medw STATUS		Open		urray MedWa	aste SE-Savannah	
2318	01/27/2022	Open	Murray	VedV	OPTER	Murray Mad Marta SE)dando 🖉	urray MedW	aste SE- Orlando	
2486		Open	Murray	ViedV	ORTER	Murray Medwaste SE- C	Jilando 🔹	anton- Mary	and	
1999		Open	Murray	VedV DESTIN	ATION	1028	~	urray MedW	aste SE-Savannah	
				SHIP DA	TE					
				EXTERN	IAL ID					
				NOTE						
				NOTE						
								_		
						SAVE CANCEL				

Pathway: Operations > Manifest Consolidation Articles: Prepare Open Batches

Dispatch (Services List) - Email Notification Added (14084)[Enhancement]

An Email Notification icon has been added to the Services List screen display to send service notification emails to select locations on a route. To use this feature, a template must be created (and marked Active) for the Operations Notification (Type) in *Setup > System > Notification Template*. To create an email notification:

- 1. Select the service locations you would like to include in the notification.
- 2. Click the email icon and the Email Notification popup window will display.
- 3. Select a template from the **Notification Template** dropdown. This will populate the Subject and Body fields with what is found in the template. If necessary, these fields can be edited before the email is sent.

SEF	VICES LIST												?	8
Dis	patch	v	Select Print For	mat 🝷 🖨 🖉	SET POSTING 🔻	SEDIT	🕒 PRINT (COMPLETED		Search		Q, 🛞	0	
	ROUTE	SEQ 🕇	ORDER NOTE	LOCATION	SCHEDULED DATE 🕇	CREATED ON	WO#	WO TYPE	SEF	RVICE TYPE	QTY	EQUIPMENT	рното	s
	04-102	1		27588 <u>FRITO LAY</u> 1234 Cadance , OR	Mon 09/19/22	08/10/22 4:50 pm	3870929	Scheduled S	FL	_SERVICE	1	8 Yard		
	04-102	2		27281 <u>NY PIZZA & DEL</u> 2222 EDGEWATER I	Mon 09/19/22 I D	08/10/22 4:53 pm	3872094	Scheduled S	. FL	SERVICE	1	6 Yard		
	04-102	4		EMAIL NOTIFICATION				? 😣	FL	_SERVICE	1	8 Yard		
	04-102	5		NOTIFICATION TEMPLATE	Operations notification	Edit Subj	ect Line	-	FL	_SERVICE	1	8 Yard		
	04-102	6		BODY					FL	_SERVICE	1	2 Yard		
	04-102	7		@@division.email;;test @@division.addressline1;; operations notification	Edit	t body of mes	sage		FL	_SERVICE	2	8 Yard		
	04-102	7					-		FL	_SERVICE	1	2 Yard		
	04-102	8							FL	_SERVICE	1	8 Yard		
	04-102	9							FL	_SERVICE	1	2 Yard		
	04-102	10		400 3 HUNT CLUD I	SEND EMAIL	CANCEL			FL	_SERVICE	1	4 Yard		
	20012				SAVE	CLOSE			<u>.</u>					

4. Select Send Email when finished.

Pathway: Operations > Dispatch; Setup > System > Notification Template Article Link: Route Service Notifications

Dispatch (Services List) - Screen Updates for 'Completion Data' View (13984)[Enhancement]

The *Services List* screen has been updated to include a Distance column to track the distance between the service location's address and the location the driver marked the service complete. The value in the Distance column displays as a link and will generate a map of the two locations when selected. If the driver has not marked a service location as complete, a Distance value will not be produced.

The Distance column is only available in the 'Completion Data' screen view.



Pathway: Operations > Dispatch > Select 'Scheduled' Link

Operations - Route Management Renumber Tool (13987][Enhancement]

A new *Re-Number* tab has been added to the Route Management tool in Operations. This tool is used for the purpose of re-numbering a route's sequence and can be used for multiple routes at a time. To use the tool:

- 1. Select each route sequence re-numbering should be applied to.
 - Allows for multiple selections.
- 2. Select the Day(s) of Week for the route(s) you would like re-sequenced.
 - Allows for multiple selections.
- 3. Enter a Sequence Gap.
 - Example: Enter a value of 5 and stops will be sequenced as 5, 10, 15, 20, 25, 30, and etc for each route.

Pending	Current	Re-Number										1
SELECT	ROUTE(S) 🕆				SELECT DAY(S)	OF WEEK				SEQUENCE GAP 10 🗘		1
✓ 02-101					Monday							1
✓ 02-102					🖌 Tuesday					RE-NUMBER		1
✓ 02-103					Wednesday							1
2 02-104					Thursday							1
2 02-105					Friday							1
2 02-106					Saturday							1
2 02-107					Sunday							1
2 02-108												1
2 02-109		_										
2 02-110		Pending	Current Re Number									
2 02-201		Clearwater	* Pinelas	▼ Roll Off, Front End Loa ▼	11-100, 11-101, 11-10 × Tuesday	✓ LOAD IMP	ORT					
✓ 02-202		Standard	👻 📝 EDIT 🛛 🙆 MAP	Boute Summary							8 Yard Trash Service, - *	Q (0)
02-203			LOCATION	QTY	SERVICE CODE	FREQ / MEXT SVC	ROUTE	5EQ †	DOW	NEW ROUTE NEW SEQ	NEW START DATE	NEW WEEK
 ✓ 02-200 ✓ 02-205 ✓ 02-205 			30739 <u>CSC1LC - Haverty #159</u> 555 Example st Palm Harbor, FL 34684	1	8 Yard Trash Service 8 Yard Trash	2x per week 10/18/22 Week 43 (A)	11-101	10	Tue			
 ✓ 02-207 ✓ 02-208 			12240 CARSMETICS 555 Example st CLEARWATER, FL 33762	1	8 Yard Trash Service 8 Yard Trash	1x per week 10/18/22 Week 43 (A)	11-101	20	Tue			
 ✓ 02-209 ✓ 02-210 			31514 Orchid Cove of Pinellas 555 Example st Palm Harbor, FL 34684-2114	1	8 Yard Trash Service 8 Yard Trash	5x per week 10/18/22 Week 43 (A)	11-101	30	Tue			
 ✓ 02-300 ✓ 02-301 			34360 Antigua Condeminium Association 555 Example st Largo, FL 33777	3	4 Yard Trash Service 4 Yard Trash	2x per week 10/18/22 Week 43 (A)	11-101	40	Tue			
 ✓ 02-302 ✓ 02-303 ✓ 02-304 			27219001 Top: Martial Arts 555 Example st 83 Clearwater, FL 33761-2900	1	2 Yard Trash Service 2 Yard Trash	1x per week 10/18/22 Week 43 (A)	11-101	50	Tue			
0,02304			27525 PALMETTO CONSTRUCTION SERVICES SSS Example st CLEARWATER, FL 33765	1	4 Yard Trash Service 4 Yard Trash	1x per week 10/18/22 Week 43 (A)	11-101	60	Tue			
			34529 <u>Mel Motors, LLC.</u> SSS Example st Clearmater, FL 33764-6897	1	4 Yard Trash Service 4 Yard Trash	1s per week 10/18/22 Week 43 (A)	11-101	70	Tue			

Pathway: Operations > Route Management > Re-number (Tab)

Dispatch - Rounding Logic Updated to Disposal Rate Field (14045)

The **Disposal Rate** field in the *Edit Disposal/Ship Record* screen has been updated to round to four decimal places.

EDIT DISPOSAL/SH	IIP RECORD								? 😣
START DATE	START TIME	END DATE	END TIME	DESTINAT	ON/ ORIGIN	l		TANK	
08/31/22 Wed	12:35 PM 📼		12:16 PM		nkey Dispo	sal and Recycling	~		~
TRANSPORT METHOD		VE	HICLE ID			EXTERNAL	TICKET #		
Truck		-							
MATERIAL	WEIGHT I	N WEIGHT OUT	QTY	UOM	MIN QTY	DISPOSAL RATE	FEE1	FEE2	TOTAL COST
Class III	-		6255	Ton 👻	0	1.2607 Ton	0.00	0.00	7885.83
NOTES									
Ticket Image									
									G
				SAVE					

Pathway: Operations > Dispatch > (Edit Disposal/ Ship Record)

Dispatch - Route Notifications Expanded to Include Text (14213)[Enhancement]

The following changes have been made to the Email Notification tool in Dispatch and Services List:

- 1. Email Notification has been renamed to Route Notification (Dispatch) or Service Notification (Services List).
- The notification has been expanded to include the option to text. To support this, Email Body and Text Body tabs were added. Upon selection of a Notification Template, the Subject, Email Body and Text Body fields populate with content created in the template (Setup > System > Notification Template). Before sending the

notification, users can edit any of the fields.

3. The 'Send Email' button has been renamed to 'Send Notification'. Notifications are sent to the contact's service notification preference.

	DISPATCH
	FROM TO DIVISION
	06/15/22 111 06/15/22 111 Orlando
	Standard 👻 🖉 Select Route Sheet 👻 🖨 🔀
	ROUTE T TRUCK
	 Wednesday Jun 15, 2022 (0 of 4 Completed)
	✓ <u>94-102</u>
	✓ <u>94-103</u>
	V 04-104 ROLITE NOTIFICATION 2 03
	04-151
	NOTIFICATION TEMPLATE Route Delay
	SUBJECT Service Delay
SERVICES LIST	2 8
Dispatch 👻 Select Print Format 👻 🍙 🥸 SET POSTING 👻 🖉 EDIT 🕲 PRINT G	T COMPLETED 😳 🕕 Search Q 💿 🗘 Email Body Text Body
ROUTE SEQ TO ORDER NOTE LOCATION SCHEDULED DATE TO CREATED ON WOW	WO TYPE SERVICE TYPE QTY EQUIPMENT PHOTOS YOU Service for @@styrigecode_name;; that is scheduled on @@scheduleddate;; at @@site.address.address.ine1;; has been delaved.
04-102 11407 Tue 10/18/22 09/3/22 3:00 am 3982674 Sc Example Location 1 1234 Example Exa	Scheduled FL_SERVICE 1 8 Yard We apologize for the inconvenience.
Ø4-102 12222 Example Location 2 3333 Example BUD 09/3/22 3:00 am 3982787 Sc	Scheduled FL_SERVICE 1 2 Yard Thanks for your patience as we work to reschedule your service.
✓ ⁰⁴⁻¹⁰² ¹⁰ SERVICE NOTIFICATION ?	d FL_SERVICE 1 6 Yard
04-102 20 NOTIFICATION TEMPLATE Service Delay	v d FL_SERVICE 1 6 Yard
SUBJECT Your Recycling Service is Delayed	
04-102 30 Email Body Text Body	d FL_SERVICE 1 6 Yard SEND NOTIFICATION CANCEL
04-102 40 Your service for @@stricecode.name;; scheduled @@scheduleddate;; at @@site.address.address.line1;; has been delayed.	d FL_SERVICE 1 4 Yard
04-102 50 Please know we will complete your service by the end of @@scheduleddate;;.	d FL_SERVICE 2 6 Yard
Thanks for your patience.	
04-102 60	d FL_SERVICE 2 6 Yard
04-102 70	d FL_SERVICE 2 4 Yard
04-102 80 SEND NOTIFICATION CANCEL	d FL_SERVICE 1 8 Yard

Pathway: Operations > Dispatch Article: Route and Service Notifications

Manifest Consolidation - Updating 'Post Batch' Status (14025)

Logic has been updated to the availability of the 'Post Batch' status option in Manifest Consolidation. Post Batch is only available for selection when the work order linked to the batch is in a 'Posted' status.

Pathway: Operations > Manifest Consolidation

Operations - Route Management Renumber Tool (13987)[Enhancement]

A new *Re-Number* tab has been added to the Route Management tool in Operations. This tool is used for the purpose of re-numbering a route's sequence and can be used for multiple routes at a time. To use the tool:

- 1. Select each route sequence re-numbering should be applied to.
 - Allows for multiple selections.
- 2. Select the Day(s) of Week for the route(s) you would like re-sequenced.
 - Allows for multiple selections.
- 3. Enter a Sequence Gap.
 - Example: Enter a value of 5 and stops will be sequenced as 5, 10, 15, 20, 25, 30, and etc for each route

Pending	Current	Re-Numb	er -									
SELECT P	ROUTE(S) 🕆				SELECT DAY(S)	OF WEEK				SEQUENCE GAP 10 🌲		
02-101					Monday							
✓ 02-102					🗹 Tuesday					RE-NUMBER		
✓ 02-103	02-103					U Wednesday						
2 02-104					Thursday							
2 02-105					Friday							
2 02-106					Saturday							
o2-107					Sunday							
2 02-108												
2 02-109	[Austra	Count In Number									
2 02-110		Perong	Currenc Merkomber									
2 02-201		Clearwater	* Pinelas	* Roll Off, Front End Loa *	11-100, 11-101, 11-10 * Tuesday	- LOAD IMP	ORT					
02-202		Standard	Y EDIT 🙆 MAP	Boute Summary							8 Yard Trash Service, - v	Q, (6)
02-203			LOCATION	QTY	SERVICE CODE	FREQ / MEXT SVC	ROUTE	seq †	DOW	NEW ROUTE NEW SEQ	NEW START DATE	NEW WEEK
✓ 02-204 ✓ 02-205 ✓ 02-205			30739 <u>CSC.LLC - Haventy #159</u> 5555 Example st Palm Harbor, PL 34684	1	8 Yard Trash Service 8 Yard Trash	2x per week 10/18/22 Week 43 (A)	11-101	10	Tue			
 ✓ 02-207 ✓ 02-208 			12240 CARSMITICS 555 Example at CLEARWATER, FL 33762	1	8 Yard Trash Service 8 Yard Trash	1x per week 10/18/22 Week 43 (A)	11-101	20	Tue			
✓ 02-209 ✓ 02-210			31514 Orchid Cove of Pinellas 535 Example st Palm Harbor, FL 34684-2114	1	8 Yard Trash Service 8 Yard Trash	5x per week 10/18/22 Week 43 (A)	11-101	30	Tue			
 ✓ 02-300 ✓ 02-301 			34360 Antigua Condeminium Association 535 Example at Largo, FL 33777	3	4 Yard Trash Service 4 Yard Trash	2x per week 10/18/22 Week 43 (A)	11-101	40	Tue			
 ✓ 02-302 ✓ 02-303 ✓ 02-304 			27219001 Top Martial Arts 555 Example st 83 Clearwater, FL 33761-2900	1	2 Yard Trash Service 2 Yard Trash	1x per week 10/18/22 Week 43 (A)	11-101	50	Tue			
02.304			27525 PALMETTO CONSTRUCTION SERVICES S55 Example st CLEARWATER, FL 33745	1	4 Yard Trash Service 4 Yard Trash	1x per week 10/18/22 Week 43 (A)	11-101	60	Tue			
			34529 <u>Mel Motors, LLC.</u> 555 Example st Clearnater, FL 33764-6897	1	4 Yard Trash Service 4 Yard Trash	1x per week 10/18/22 Week 43 (A)	11-101	70	Tue			

Pathway: Operations > Route Management > Re-number (Tab)

Dispatch (Services List) - Screen Updates for 'Completion Data' View (13984)[Enhancement]

The *Services List* screen has been updated to include a Distance column to track the distance between the service location's address and the location the driver marked the service complete. The value in the Distance column displays as a link and will generate a map of the two locations when selected. If the driver has not marked a service location as complete, a Distance value will not be produced.

The Distance column is only available in the 'Completion Data' screen view.



Pathway: Operations > Dispatch > Select 'Scheduled' Link

Dispatch (Services List) - Email Notification Added (14084)[Enhancement]

An Email Notification icon has been added to the Services List screen display to send service notification emails to select locations on a route. To use this feature, a template must be created (and marked Active) for the Operations Notification (Type) in *Setup > System > Notification Template*. To create an email notification:

- 1. Select the service locations you would like to include in the notification.
- 2. Click the email icon and the Email Notification popup window will display.
- 3. Select a template from the **Notification Template** dropdown. This will populate the Subject and Body fields with what is found in the template. If necessary, these fields can be edited before the email is sent.
- 4. Select Send Email when finished.

SER	VICES LIST												?	8
Dis	patch	v	Select Print For	mat 🝷 🖨 🛛 🖉	SET POSTING 🔻	SEDIT	🕒 PRINT (COMPLETED		Search		Q, (2)	0	
	ROUTE	seq 🕇	ORDER NOTE	LOCATION	SCHEDULED DATE 🕇	CREATED ON	WO#	WO TYPE	7	SERVICE TYPE	QTY	EQUIPMENT	рното	IS
	04-102	1		27588 <u>FRITO LAY</u> 1234 Cadance , OR	Mon 09/19/22	08/10/22 4:50 pm	3870929	Scheduled S		FL_SERVICE	1	8 Yard		
	04-102	2		27281 <u>NY PIZZA & DEL</u> 2222 EDGEWATER I	Mon 09/19/22 <u>I</u> D	08/10/22 4:53 pm	3872094	Scheduled s		FL_SERVICE	1	6 Yard		
	04-102	4		EMAIL NOTIFICATION				? 😣		FL_SERVICE	1	8 Yard		
	04-102	5		NOTIFICATION TEMPLATE	Operations notification	Edit Subj	ect Line	-		FL_SERVICE	1	8 Yard		
	04-102	6		BODY						FL_SERVICE	1	2 Yard		
	04-102	7		@@division.addressline1;; operations notification	Edit	body of mes	sage			FL_SERVICE	2	8 Yard		
	04-102	7				-	Ū			FL_SERVICE	1	2 Yard		
	04-102	8								FL_SERVICE	1	8 Yard		
	04-102	9								FL_SERVICE	1	2 Yard		
	04-102	10		400 3 HUNT CLUD I	SEND EMAIL	CANCEL				FL_SERVICE	1	4 Yard		
	20012				SAVE	CLOSE								

Pathway: Operations > Dispatch; Setup > System > Notification Template Article Link: Route Service Notifications

Sales

Sales Management - New Column Placement for Rejected Contracts (14174)[Enhancement]

Previously, rejected contracts displayed under the '*Contract Review Pending*' column in the Sales Management screen. An update has relocated rejected contracts to display under the '*Contract Review Complete*' column.

SARASOTA + 2022	т 10-ОСТ т			SALES REP REPORT COMMISSION REPORT		¢
SALES REP	CONTRACT REVIEW PENDING	CONTRACT REVIEW COMPLETE	COMMISSION REVIEW PENDING	EXCLUDED FROM COMMISSION	COMMISSION REVENUE	COMMISSION
Example Rep	\$(425.00) 1	\$ 0.00 0	\$ 0.00	\$ 0.00 0	\$ 0.00 0	\$ 0.00 0
Example Rep	\$ 0.00 0	\$ 0.00 0	\$ 200.00 1	\$ 0.00 0	\$ 0.00 0	\$ 0.00 0
Example Rep	\$ 0.00 0	\$ 0.00 0	\$ 166.50 4	\$ 0.00	\$ 0.00 0	\$ 0.00 0
Example Rep	\$ 0.00 0	\$ 0.00 0	\$ 100.00 1	\$ 0.00 0	\$ 0.00 0	\$ 0.00 0
Example Rep	\$ 0.00 0	\$ 0.00 1 (1 rejected)	\$ 0.00 0	\$ 0.00 0	\$ 0.00 0	\$ 0.00 0
	\$(425.00)	\$ 0.00	\$ 466.50	\$ 0.00	\$ 0.00	\$ 0.00
EXPAND ALL COLLAPSE ALL						Last Updated: Search
SUBMITTED DATE ACCOUNT		PROPOSAL # EFFECTIVE DATE	E TERM RENEWAL RA	TE APPROVAL	SOLD BY	
Two Oct 11 Bejected Contract Test Add Svc- 1 40 Yard Tresh Service Seasonal	Guarantee Months: 0 Increase	18140 1011/22 Lunit: 0% On Call D	60 1 \$0.00 \$0.00 per month Hauf Fee: \$200.00 per haul Relocate: \$0.00 per haul Report \$0.00 per haul Delivery: \$0.00 per unit Delivery: \$0.00 per unit	0 \$ 0.00 cy	Nanusoft	RELECTION Note: Testing
signed proposal does not exist service Ag	reement not countersigned					

Pathway: Sales > Sales Management

Setup

Permissions - New Permission Added for Invoice Notification Monitoring Tool (13996) [Enhancement]

Permission 427 'Permission to view Notification History' is now available. This permission should only be assigned to users whose job duties include accessing the Invoice Notification Monitoring tool in the Accounting module.

PERMISSIO	ON SETUP			
MODULE	Database	• 🛞		427
PERMISSION	ID	NAME	DESCRIPTION	MODULE
158		view Calculate RO Revenue screen		Database
159		Post Revenue to Sales Report		Database
160		Calculate RO Revenue by period		Database
161		Year End RO Revenue		Database
164		View Cancellation Request Pipeline		Database
177		Permission to Review Contracts		Database
180		Permission to View Customer Activity Analysis		Database
187		Permission to view User Location Map		Database
188		Permission to view Revenue Per Cubic Yard Map		Database
195		Permission to view Sales Lead Analysis		Database
196		Permission to calculate weight based profit analysis		Database
197		Permission to generate profit analysis leads		Database
343		Permission to Add/Edit Tag Type	Permission to Add Tag Type	Database
362		Permission to delete signed or uploaded contract	Permission to delete signed or uploaded contract	Database
392		Permission to edit Reason Code for Sales Result	Permission to edit Reason Code for Sales Result	Database
423		Permission to Import Inventory	Permission to Import Inventory	Database
426		Permission to import Fuel Record	Permission to import Fuel Record	Database
427		Permission to view Notification History	Permission to view Notification History	Database
436		Permission to view Request Audit	Permission to view Request Audit	Database

Pathway: Setup > System > Permission

Setup (Bill Group) - Custom Fields Added to Bill Group Setup (14178)[Enhancement]

Two new fields, **Custom 1** and **Custom 2** have been added to the Add and Edit screens for Bill Groups for use in custom invoice formatting.

BILL GROUP SETUP				
	- TYPE All	~		
ID	NAME		DIVISION	ТҮРЕ
AUTO_PAY	Auto Pay Testing		AUTOPAY	Advance
CLW_NB				
CLWRES_HOA	ADD BILL GROUP			0.8
CW_COM_AD	Settings Notifications			
CW_COM_AR				
CW_MUNI_AR	ID		INVOICE EMAIL FROM	
CW_RED_ANN	ACTIVE	Yes 👻	PRINT SEQUENCE	Invoice Number
CW_RES_2WK				
CW_RES_4WK	NAME		INVOICE LOGO	Select Image BROWSE
CW_RES_MO	DIVISION	- 😣	UPLOADED INVOICE LOGO	
CW_RES_Q_A	ТҮРЕ	-		Select Image BROW(SE
CW_RES_SEM			INVOICE LOGO 2	Select image BROWSE
CW_RES_WK	FREQUENCY	•	UPLOADED INVOICE LOGO 2	
DEMO-ARR	INVOICE FORMAT	•	WORK ORDER HEADER TEXT	
Old_Mun_AR	BILLING EXPORT FORMAT	None		
Olds_Com_A			SURCHARGE HEADER TEXT	
Olds_RES_M	CUSTOMER PORTAL URL		FINANCE CHARGES TEXT	Finance Charges
OR_ADVANCE	INVOICE MESSAGE			- 0
OR_ARREARS			BILLING AUTO PAT PROCESS DATE	
SA_ADV			SCHEDULED AUTO PAY TIME	12:00 AM 👻
SA_ARREAKS				
	MESSAGE DUE IN PAST 1-30 DAYS		MIN AMOUNT TO BE PRINTED	0.00
	MESSAGE DUE IN PAST 30-60 DAYS			
SAARREARS			ONE INVOICE PER PO#	No 👻
	MESSAGE DUE IN PAST 61-90 DAYS		CUSTOM 1	
	MESSAGE DUE IN PAST 91 DAYS		CUSTOM 2	
			SAVE	

Pathway: Setup > Accounting > Bill Group

Work Type - Logic Updated to Manifest Notification Template in Work Type Setup (14067)

Logic has been updated to the 'Manifest Notification Template' field in Work Type Setup to limit the options to only display Operation Notification template types. Operation Notifications are created in Setup > System > Notification Template. This applies when adding or updating the work types.

			ADD WORK TYPE			
NOTIF	ICATION TEMPLATE SETUP		Work Type			
Ð	TYPE Operations Notification		ID			
ID	NAME	DEFAULT SUBJECT	NAME			
72	test operations notification	test operations notification	LOB	•		
			INVENTORY MOVE TYPE	None 👻		
			ACTION CATEGORY	- × (8)		
		\sim	ORDER BASELINE SECONDS			
			DEFAULT SECONDS PER UNIT		_	
			MANIFEST NOTIFICATION TEMPLATE	•		
			CREATE ONE SERVICE RECORD PER QUANTITY	No 👻		
			ENABLE DISPOSAL OR MATERIAL ENTRY	None 👻		
			ENABLE CONSOLIDATION BATCH LINK	No 👻		
			ENABLE DRIVER ENTERED LABEL WEIGHTS	No 👻		
			ENABLE DRIVER PHOTO PROMPT	No 👻		
			PRODUCTIVITY UNITS	1.00		
			ALLOW CUSTOMER PORTAL ENTRY	No 👻		
				SAVE		

Pathway: Setup > Operations > Work Type

A new option, 'One Time Fee Per Invoice' has been added to the Finance Charge Type selection field in the Add Account Class screen. When 'One Time Fee Per Invoice' is selected, the Annual Rate field below it will display as 'Rate'.

ADD A	ACCOUNT CLASS ails Portal / Payment Processing le VE	Pariser	Status Management FNABLE AUTOMATIC STATUS UPDATE		?	8
Det 1 Commercia 2 Governme NAM 3 Residentia ACTM 4 PERM TYPE 5 TEMP	ails Portal / Payment Processing	Puriper v	Status Management			
1 Commercia 2 Governme 3 Residentia ACTIN 4 PERM TYPE	IE VE		Status Management		_	_
3 Residentia ACTIN 4 PERM TYPE 5 TEMP	VE		ENABLE AUTOMATIC STATUS UPDATE			
4 PERM 5 TEMP		Puriners -			·	
5 TEMP		pusifiess *	AUTO CREDIT HOLD PAST DUE DAYS	60	:	
6 BROKER GLA	CCOUNT	· · · · · · · · · · · · · · · · · · ·	AUTO CREDIT HOLD MINIMUM PAST DUE AMOUNT	10.00	:	
7 VENDOR GL SE	EGMENT		AUTO INACTIVE ACCOUNT/SITE DAYS	30	:	
DEFA	AULT ACCOUNT CREDIT LIMIT	÷	AUTO CREDIT HOLD PLACEMENT		·	
DEFA	AULT ACCOUNT TERM	v	AUTO CREDIT HOLD REMOVAL		·	
DEFA	ULT REBATE PAYMENT TYPE	~	STATUS UPDATE TIME		·	
DEFA	ULT BILL BY SITE	No 👻		Central Standard Tim	e	
CREA	TE CONTACT DEFAULT	Account ~	RUN DAILY AUTO APPLY	No	,	
DEFA	AULT CONTACT SERVICE NOTIFICATION	Yes 👻				
GEOG	CODING TYPE	•	FINANCE CHARGE TYPE	One Time Fee Per Invoice		
GEO	FENCE RADIUS	30.00 🌲				
NSF F	FEE	\$	RATE	0.00		
NEW	ACCOUNT NOTIFICATION TEMPLATE	▼ ⊗	CHARGE CODE			
REQU	JIRE GENERATOR TYPE	*	CHARGE MINIMUM	0.00		
ENAE	BLE LINKING CONTACTS TO ALL SITES	Yes 👻	PAST DUE MINIMUM	10.00		
LOAD	D ACTIVE ACCOUNTS IN PIPELINE MAP	Yes 👻	APPLY FIN. CHARGE FROM DAYS			
REQU	JIRE BILLING CONTACT	No 👻			_	
			SAVE			

Pathway: Setup > Account > Account Class

Setup (Accounting) - New 'Account Portal URL' Field Added to Bill Group Setup (14153) [Enhancement]

An **Account Portal URL** field has been added to the Add Bill Group screen to accommodate accounts with multiple portal URLs. When the Account Portal URL field is populated for the Bill Group, it will display on invoices, past due letters and manifests. If the Account Portal URL field is not populated for the Bill Group the system will then look at the Division for the URL and finally the account's setup.

BILL GROUP SETUP						
	II	PE All	-		~	
ID	ADD BILL GROUP					×
AUTO_PAY	Settings Notifications					
CLW_NB					_	
CLWRES_HOA	ID		INVOICE EMAIL FROM			
CW_COM_AD	ACTIVE	Yes	PRINT SEQUENCE	Invoice Number	-	
CW_COM_AR						
CW_MUNI_AR	NAME		INVOICE LOGO	Select Image BROWSE		
CW_RED_ANN	DIVISION	- O	UPLOADED INVOICE LOGO			
CW_RES_2WK	TYPE					
CW_RES_4WK	1176		INVOICE LOGO 2	Select Image BROWSE		
CW_RES_BIM	FREQUENCY	.	UPLOADED INVOICE LOGO 2			
CW_RES_DLY	INVOICE FORMAT					
CW_RES_MO			WORK ORDER HEADER TEXT			
CW_RES_Q_A	BILLING EXPORT FORMAT	None	SURCHARGE HEADER TEXT			
CW_RES_SA	ACCOUNT PORTAL URL		FINANCE CHARGES TEXT	Finance Charges		
CW_RES_SEM	INVOICE MESSAGE				_	
CW_RES_WK			BILLING AUTO PAY PROCESS DATE	· ·	8	
DEMO-ARR			SCHEDULED AUTO PAY TIME	12:00 AM	-	
Old_Mun_AR						
Olds_Com_A	MESSAGE DUE IN PAST 1-30 DAYS					
Olds_RES_M			MIN AMOUNT TO BE PRINTED	0.00		
OR_ADVANCE	MESSAGE DUE IN PAST 30-60 DAYS		ONE INVOICE PER PO#	No	Ŧ	
OR_ARREARS	MESSAGE DUE IN PAST 61-90 DAYS		CUSTOM 1			
SA_ADV	MESSAGE DUE IN PAST OF DAVE		CUSTOM 1			
SA_ARREARS	MESSAGE DUE IN PAST 91 DATS		CUSTOM 2			
SA_NB_ARR						
SA_PORTA			SAVE			
C. C. 100C						

Pathway: Setup > Accounting > Bill Group

Division Setup – Default Logic Updated to 'Credit Card Gateway' and 'RO Disposal REV %' Fields (14113) [Enhancement]

The following default logic has been applied when adding a new division:

- 1. RO Disposal Rev % in the Details tab defaults to display '0.00'.
- 2. Credit Card Gateway in the Credit Card /ACH Processing tab defaults to display 'None'.
 - When a value other than 'None' is selected, *Gateway ENV* and *Gateway Settlement Time* are required fields.

DIVISION SETUP						
DIVISION Select Division	20	¥				
Details Credit Card / ACH	Processing C.v.	1 (mare)				
ID		GL SE	GMENT		ADD DIVISION	8
NAME		ESC A	AUTO PROCESS		Details Credit Card / ACH Processing	
DBA NAME		ADD DIVISION				
LEGAL NAME		Details Credit Card / ACH	I Processing		ENABLE CREDIT CARD PROCESSING No	
ADDRESS LINE1	Enter a location	L			CREDIT CARD GATEWAY None	
ADDRESS LINE2		NAME		GL SEGMENT	GATEWAY ENV	
CITY		DBA NAME		ESC AUTO PROCESS	GATEWAY API KEY / USER NAME	
STATE		LEGAL NAME		ENABLE INTEGATION		
BILL ADDRESSLINE1	Enter a location	ADDRESS LINE1	Enter a location	EXIDE ID		
BILL ADDRESSLINE2		ADDRESS LINEZ		LOCKBOX IMPORT FC		
BILL CITY		CITY	710	ACCOUNT		
BILL STATE	BILL		Enter a location	PAYMENT PORTAL UP		
MAIN PHONE	(201) 555	BILL ADDRESSLINE?		MAILCHIMP API KEY	Y	_
TOLL FREE PHONE	• (201) 555	BILL CITY		MAILCHIMP LIST ID	SAVE	
FAX	• (201) 555	BILL STATE	BILL ZIP	SMS TASK DEFAULT U	USER •	
EMAIL		MAIN PHONE	(201) 555-0123	RO DISPOSAL REV %	0.00	
DIVISION GROUP		TOLL FREE PHONE	(201) 555-0123	SERVICE NOTIFICATIO	ION FROM EMAIL	
EPA ID		FAX	(201) 555-0123	CUSTOMER PORTAL F	PAST DUE TEXT	
		EMAIL		NOTE		
		DIVISION GROUP	- 😒			
		EPA ID				
				LOGO URL	Select Image BROWSE	
				SAVE		

Pathway: Setup > System > Division

Set Up - System Options Currency Field Added (14120)

A Currency field has been added to the Systems tab in the System Options tool. Making a selection here will change how currency is displayed throughout the application for all users.

System Sales Integrati	on Account Operations Ac	count Portal	Broker	Online Order		
ENVIRONMENT			LOGIN LOGO		Select Image	BROWSE
DIVISION LABEL	Division		LOGIN LOGO	URL	View	
EXTERNAL ID LABEL	Old ID		APPLICATION	LOGO	Select Image	BROWSE
SITE CLASS LABEL	Site Class		APPLICATION	LOGO URL	View	
AUTO REFRESH TIME	2	*	ATTACHMENT	EMAIL		
FAST AUTO REFRESH TIME	1	*	EXTERNAL NO	DTES LIMIT	0	\$
TIME ZONE	Central Standard Time	*				
CURRENCY	US Dollar	-				
LOCALE	Australian Dollar British Pound Sterling					
	Canadian Dollar					
	Euro					
	New Zealand Dollar					
	US Dollar					

Pathway: Set Up > System > System Options