

# [Archive] Release Version 66

Last Modified on 02/14/2025 6:44 am PST



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	A
ENVIRONMENT					
DIVISION LABEL			Division		
EXTERNAL ID LABEL			Old ID		
SITE CLASS LABEL			Site Class		
AUTO REFRESH TIME			2		
FAST AUTO REFRESH TIME			1		
TIME ZONE			Central Standard Time		
CURRENCY			US Dollar		
LOCALE			United States (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 and In Process		History				
DIVISION All						
BILL GROUP	DIVISION	BATCH ID	TYPE	STATUS	INVOICE DATE	
NO BILL	Clearwater	7520	Scheduled	Posted	04/20/20	
Sarasota Portolets	Sarasota	7560	Scheduled	Posted	09/01/20	
Sarasota Advanced	Sarasota	7569	Scheduled	Processed	09/01/20	
Orlando Arrears	Orlando	7581	Scheduled	Processed	09/01/20	
Clearwater Monthly Advance	Clearwater	7521			12/01/20	
Clearwater Monthly Advance	Clearwater	7573			10/01/20	
Municipal	Oldsmar	7571			11/30/20	
DEMO	Training Division	7515			03/10/20	
Clearwater Residential Monthly	Clearwater	7538			08/16/20	
Clearwater Res Quarterly Advance	Clearwater	7572			10/01/20	
DEMO	Training Division	7505			12/23/20	

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 and In Process History

DIVISION All

BILL GROUP	DIVISION	BATCH ID	TYPE	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
Clearwater Monthly Advance	Clearwater	7521	Scheduled	Posted	12/01/2021	12/01/2021 - 12/31/2021	484
Clearwater Monthly Advance	Clearwater	7573	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	
Clearwater Residential Monthly	Clearwater	7538	Scheduled	Not Started	08/16/2022	08/01/2022 - 08/31/2022	
Clearwater Res Quarterly Advance	Clearwater	7572	Scheduled	Not Started	08/16/2022	08/01/2022 - 08/31/2022	
DEMO	Training Division	7505	Off Scheduled	Posted		08/31/2021 - 12/31/2021	

EDIT BILLING BATCH

DIVISION Clearwater

BILL GROUP Clearwater Residential Monthly / Monthly / Advance / Clearwater

TYPE Scheduled

INVOICE DATE 08/16/2022

BILL FROM DATE 08/01/2022

BILL TO DATE 08/31/2022

EDIT BATCH CANCEL

These fields can only be edited if batch Status is: Not Started.

Edit Batch  
 Edit Message  
 Pre-Billing  
 Process Billing  
 Void

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 BATCH

DIVISION Houston

BILL GROUP Houston RES Biweekly / Every 2 Weeks / Advance / Houston

TYPE

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

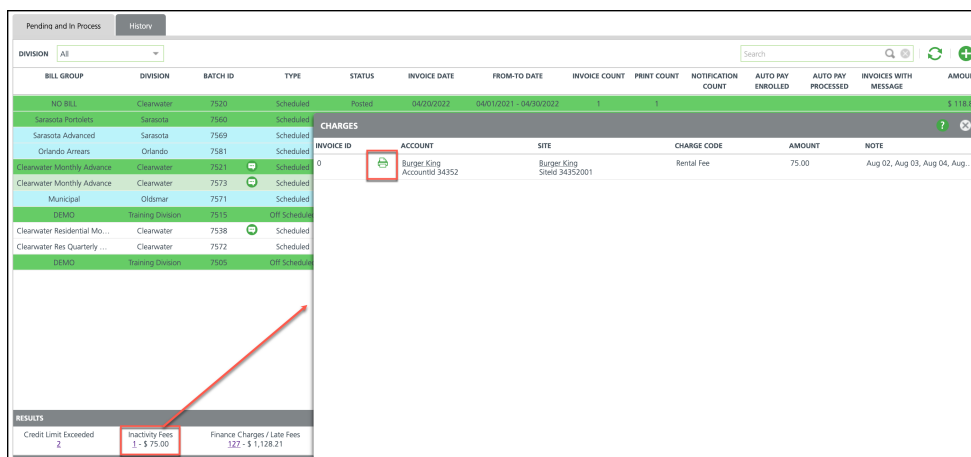
'From' and 'To' date fields for auto-generated batches are determined using the previously completed billing batch.

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** ? X

ID 9894

**CREATED BY** Navusoft System 09/15/2022 11:33 am

ADD ATTACHMENT

**TOM BROWN**  
 777 LUCKY LANE  
 PALM HARBOR, FL 34683

**CONTACT**  

SMS Smith
(777) 777-7777 (mobile)

**TYPE**  

Customer Support (Operations)

**ASSIGNED TO**  

Mimi Howard (Sales)

**PRIORITY**  

Medium

**DUE DATE**  

09/16/2022 Fri

**REPEAT**  

None

**Auto Notify By**

EMAIL

TEXT MESSAGE

**NOTE**  

TEXT MESSAGE FROM CONTACT:  
 Text just to test getting it  
 TEXT MESSAGE FROM CONTACT:  
 Text just to test getting it

**COMPLETION NOTE**

**COMPLETE?**

+

USER	DATE	NOTE	NOTIFY 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.

The screenshot displays a software interface with two main sections. The top section, titled 'ACTIVE SERVICES (4)', shows a list of services with columns for 'QTY' and 'SERVICE CODE'. The services listed are: 1 6 Yard Trash Service, 1 250 Gallon holding tank, 1 10 Yard Asphalt Service, and 1 15 Yard Waste Service. The bottom section is a 'CALENDAR' for 'September, 20'. It shows dates from August 28 to September 11. The date September 4 is highlighted in red and labeled 'Labor Day'. A dropdown menu is open over the calendar, showing a list of event types: All, AR, Service Records, Rental Fee (checked), Service Changes, System, Appointment, Cancellation, Complaint, Email, Note, Task, and Text Message. A red arrow points to the 'Rental Fee' option in the dropdown menu.

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.

2626 | Navusoft Setup

**Account** Active  
 8100 Washington Ave  
 Houston, TX 77007

**DIVISION** Training Division  
**ACCOUNT MGR**  
**CLASS** Residential  
**BILL GROUP** DEMO

<b>CURRENT</b>	<b>1-30</b>	<b>31-60</b>	<b>61-90</b>	<b>91-120</b>	<b>120+</b>
0.00	0.00	0.00	0.00	0.00	90.91

**HIGHLIGHTS** **PENDING**

! Account is significantly past due 9893 Driver Note

ACTIVE SERVICES (3) Standard

QTY	SERVICE CODE
+	1 2 Yard Trash Service
+	1 4 Yard Trash Service
+	1 2 Yard OCC Service

CALENDAR September, 20 CALENDAR EVENT AR, Service Records, Rental Fee, Service

SUN	MON	TUE
Aug 28	Aug 29	Aug 30
Sep 4	Labor Day	Sep 6
Sep 11	Sep 12	Sep 13

(2) Aliena Somers

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.

The screenshot displays the Navusoft account management interface. At the top, account details for Navusoft, LLC are shown, including address and contact information. A modal window titled "PHOTOS, ATTACHMENTS, PURCHASE ORDERS AND WASTE PROFILES" is open, showing a table of purchase orders. A red box highlights the "Blanket Purchase Orders" tab, and a red arrow points to a green plus icon labeled "Add New Blanket Purchase Order".

PO NUMBER	AMOUNT	AMOUNT BILLED TO DATE	STATE DATE	END DATE	NOTE	CREATED DATE	CREATED BY
878	\$ 200.00	\$ 0.00	10/03/2022			09/26/2022 3:39 pm	Aliena Somers

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.

The screenshot shows the Request Audit screen with filters for user (AJ Wilson), response code (All), and within last 30 days. The table displays audit records with columns for ID, Timestamp, End Timestamp, User, Request Path, Status, Session ID, IP Address, and Response Code. A red box highlights a row with a "Bad Request" status.

ID	TIMESTAMP	END_TIMESTAMP	USER	REQUEST_PATH	STATUS	SESSION_ID	IP_ADDRESS	RESPONSE_CODE
4185919	Sep 28, 2022 1:17 pm	Sep 28, 2022 1:17 pm	Lori Sheldt	/report/workorders/DOC_SHRE_MANIFES...	Success	975E2449-E01C-45F6-BEB1-F43C812EE9EE	208.102.243.43	Success
4185918	Sep 28, 2022 1:15 pm	Sep 28, 2022 1:15 pm	Lori Sheldt	division/1002	Success	975E2449-E01C-45F6-BEB1-F43C812EE9EE	208.102.243.43	Success
4185917	Sep 28, 2022 1:04 pm	Sep 28, 2022 1:04 pm	Lori Sheldt	/reports	Bad Request	3CBDC7E9-85F2-4753-8B62-3BF97E3A7318	208.102.243.43	Bad Request
4185916	Sep 28, 2022 12:55 ...	Sep 28, 2022 12:55 ...	Navusoft	division/1001	Success	6436525E-047A-4FF9-B16D-51700E7868FB	58.114.9.139	Success

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.

The screenshot shows the 'Route Productivity' view in the Dispatch application. The main table lists routes with columns for DRIVER, PAYROLL CLOCK IN, LOG IN, PRE TRIP, FIRST SERVICE TIME, LUNCH START, LUNCH END, LAST SERVICE TIME, TRUCK/RELEASE, FUEL, POST TRIP, LOG OUT, PAYROLL CLOCK OUT, DOWNTIME, and LABOR HOURS. A popup window titled 'WORKER DAILY PRODUCTIVITY' is open, showing details for route 11-10901 and driver Laurie. The popup includes fields for PAYROLL CLOCK IN (9:00 am), LOG IN (9:05 am), LOG OUT (4:55 pm), and PAYROLL CLOCK OUT (5:00 PM). A red box highlights the 'Laurie' name in the driver dropdown, and another red box highlights the '5:00 PM' value in the payroll clock out field.

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.

The screenshot shows the 'MANIFEST CONSOLIDATION BATCH' popup window. The background is a table with columns: ID, SHIP DATE, STATUS, SOURCE, TRANSPORTER, DESTINATION, and EXTERNAL ID. A red arrow points from the text 'Right-click' to the 'STATUS' column of the first row (ID 2191). The popup window has fields for SOURCE (1053), STATUS (Open), TRANSPORTER (Murray MedWaste SE- Orlando), DESTINATION (1028), SHIP DATE, EXTERNAL ID, and a NOTE field. There are 'SAVE' and 'CANCEL' buttons at the bottom of the popup.

Pathway: *Operations > Manifest Consolidation*

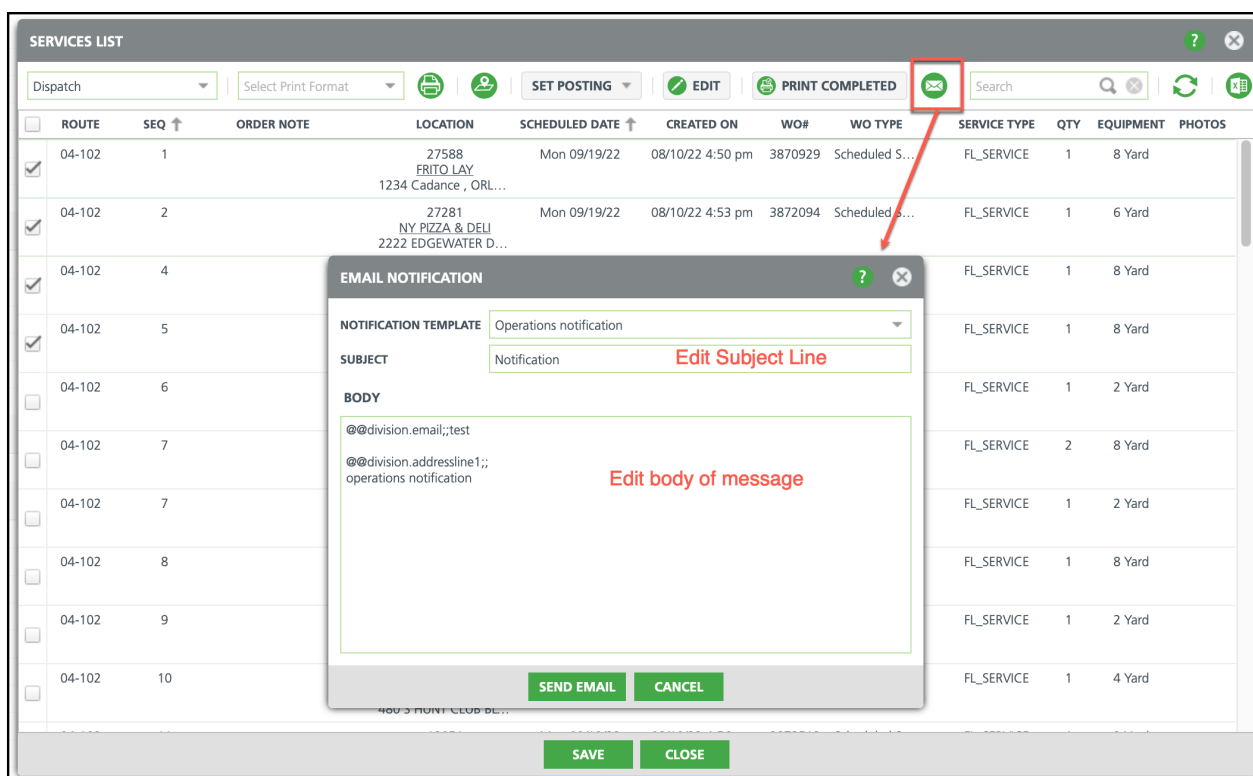
Articles: [Prepare Open Batches](#)

### 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.
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.

**SERVICES LIST**

Completion Data | Select Print Format | SET POSTING | EDIT | PRINT COMPLETED | Search

ROUTE	SEQ ↑	LOCATION	WO TYPE	SVC QTY	PHOTOS	REVENUE	DISPOSAL COST	OPERATION COST	PROFIT	MINUTES	DISTANCE
12-301	12:09 pm	330894435 * UNITED HEALTH CARE 601 BROOKER CREEK B...	Scheduled Ser... <b>COMPLETED</b> 12:09 pm	0		0	110		0		10.47 mi

Map showing the route from Farmers Market to Park Place in Houston. The distance is 10.47 miles.

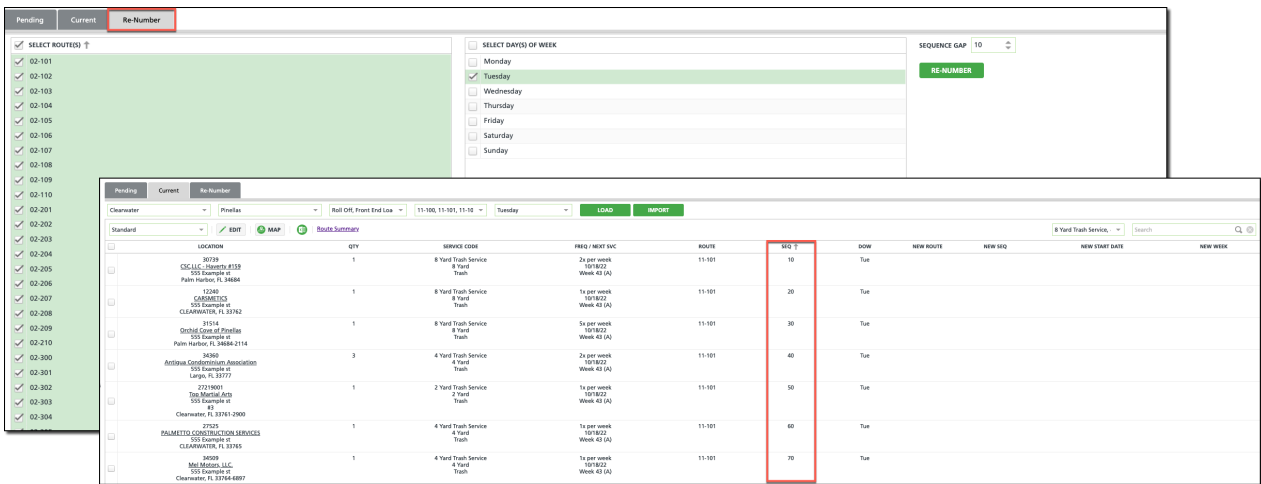
Pathway: Operations > Dispatch > Select 'Scheduled' Link

## 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:

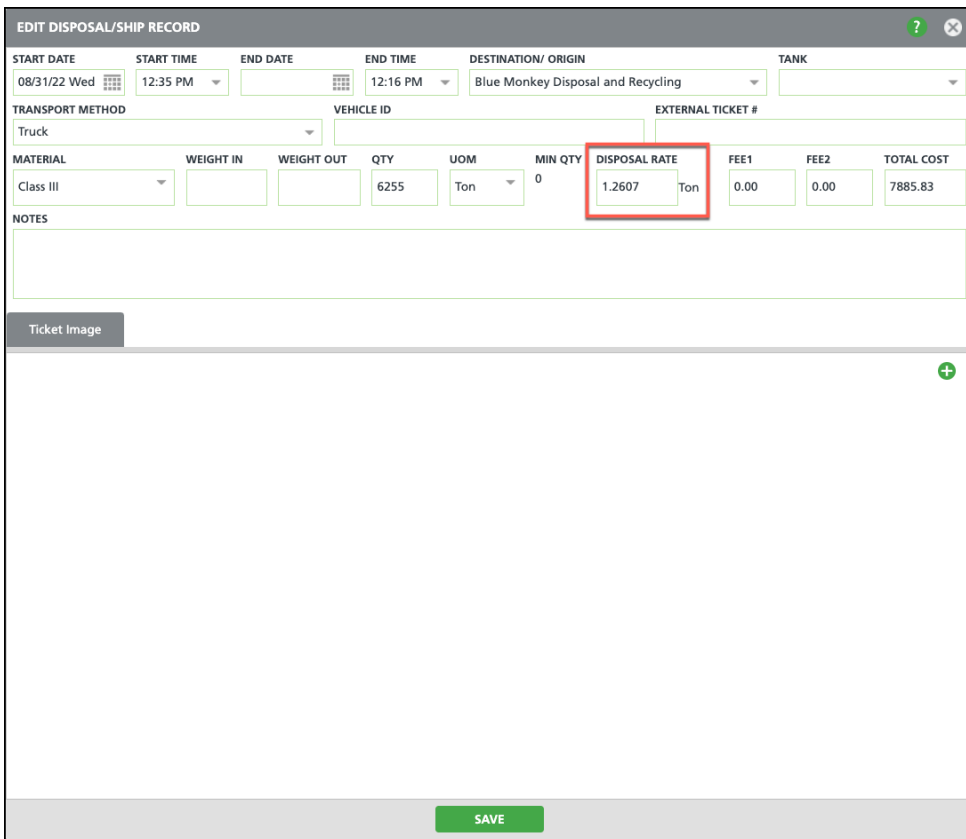
- Select each route sequence re-numbering should be applied to.
  - Allows for multiple selections.
- Select the Day(s) of Week for the route(s) you would like re-sequenced.
  - Allows for multiple selections.
- Enter a Sequence Gap.
  - Example: Enter a value of 5 and stops will be sequenced as 5, 10,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



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.



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

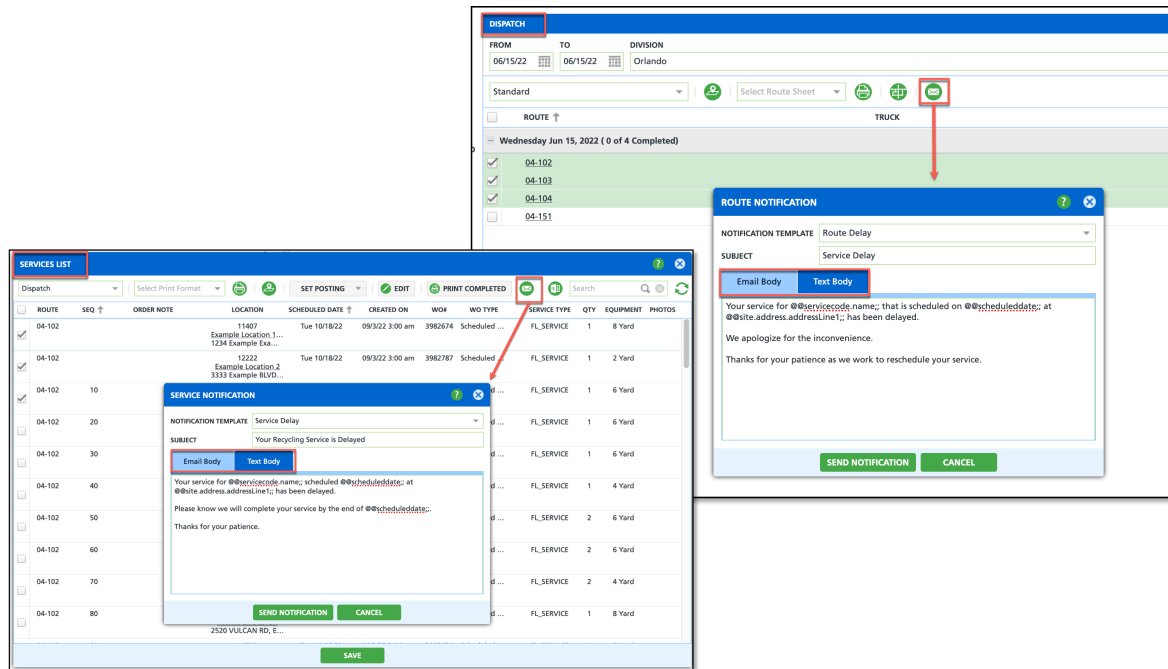
## Dispatch - Route Notifications Expanded to Include Text (14213)[Enhancement]

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).
2. 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.



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

LOCATION	QTY	SERVICE CODE	FREQ / NEXT SVC	ROUTE	SEQ #	DOW	NEW ROUTE	NEW SEQ	NEW START DATE	NEW WEEK
30739 CSC/CL CLEARWATER #153 511 Clearwater Palm Harbor, FL 34684	1	8 Yard Trash Service # Travel Team	2x per week 10/10/22 Week 43 (A)	11-101	10	Tue				
12040 CLEARWATER 511 Clearwater CLEARWATER, FL 33762	1	8 Yard Trash Service # Travel Team	1x per week 10/10/22 Week 43 (A)	11-101	20	Tue				
31114 District of Columbia 511 Clearwater Palm Harbor, FL 34684-2114	1	8 Yard Trash Service # Travel Team	5x per week 10/10/22 Week 43 (A)	11-101	30	Tue				
34060 Artistic Creations Association 511 Clearwater Largo, FL 33777	3	4 Yard Trash Service # Travel Team	2x per week 10/10/22 Week 43 (A)	11-101	40	Tue				
2724601 T&M Marine 511 Clearwater Clearwater, FL 33761-2900	1	2 Yard Trash Service # Travel Team	1x per week 10/10/22 Week 43 (A)	11-101	50	Tue				
27215 PALMETTO CONSTRUCTION SERVICES 511 Clearwater CLEARWATER, FL 33765	1	4 Yard Trash Service # Travel Team	1x per week 10/10/22 Week 43 (A)	11-101	60	Tue				
34009 M&M Services, LLC 511 Clearwater Clearwater, FL 33765-4897	1	4 Yard Trash Service # Travel Team	1x per week 10/10/22 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.

The screenshot shows the 'SERVICES LIST' interface with the 'Completion Data' view selected. A table row is highlighted, showing a service with a 'Distance' of 10.47 mi. A red box highlights the 'Distance' column, and a red arrow points to a map window that opens when the link is selected. The map shows a route between two locations in Houston, Texas, with a distance of 10.47 miles.

ROUTE	SEQ	LOCATION	WO TYPE	SVC QTY	PHOTOS	REVENUE	DISPOSAL COST	OPERATION COST	PROFIT	MINUTES	DISTANCE
12-301	12:09 pm	330894435 * UNITED HEALTH CARE 601 BROOKER CREEK B...	Scheduled Ser... COMPLETED 12:09 pm	0		0	110		0		10.47 mi

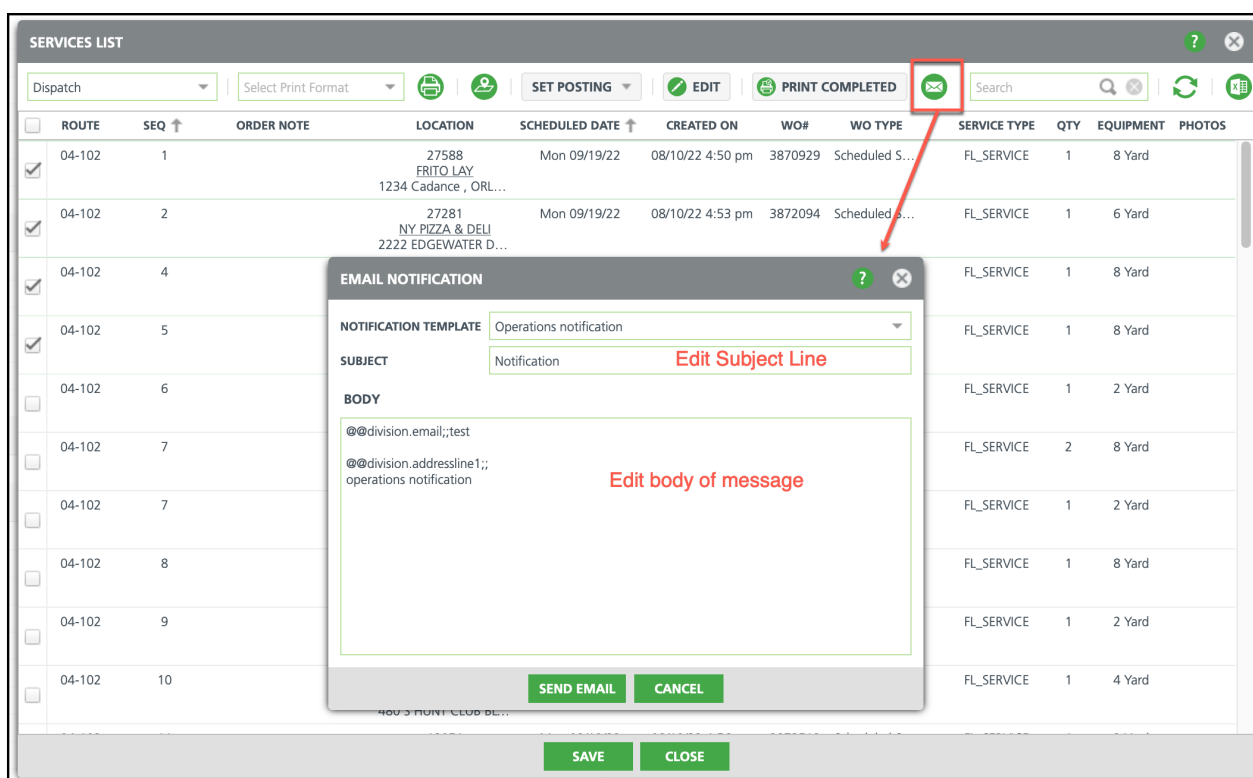
Pathway: Operations > Dispatch > Select 'Scheduled' Link

### 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.



Pathway: *Operations > Dispatch; Setup > System > Notification Template*

Article Link: [Route Service Notifications](#)

## Sales

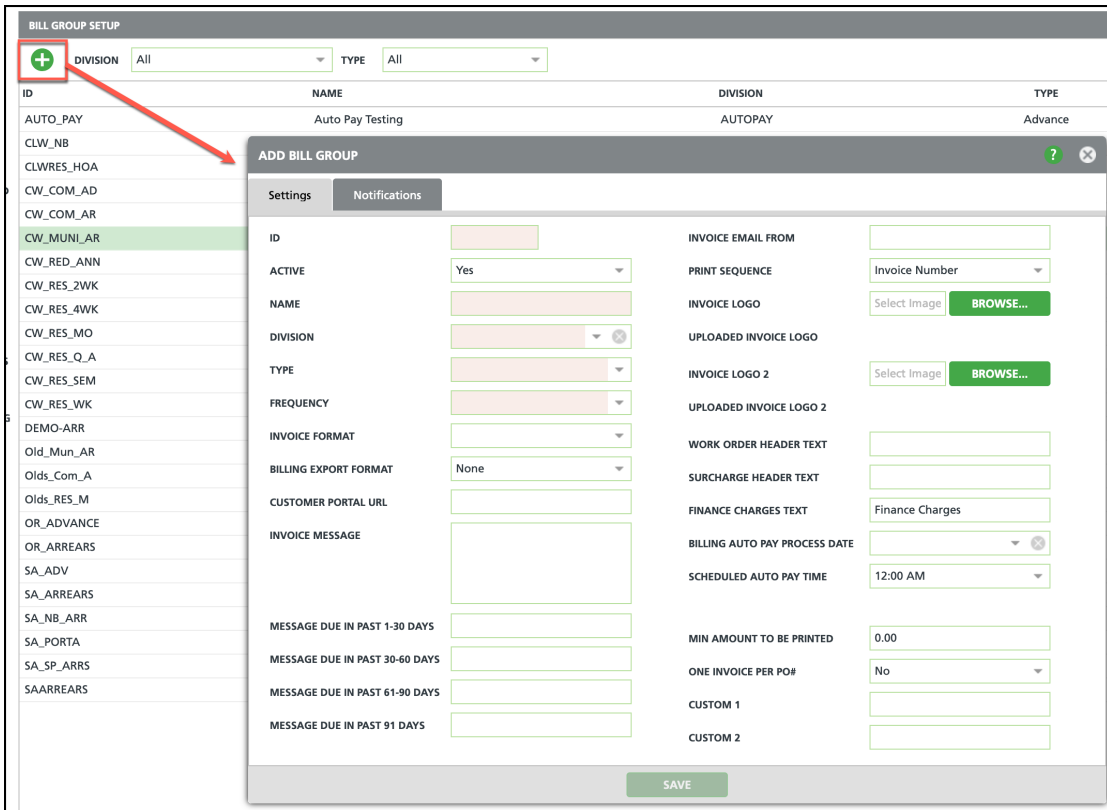
### Sales Management - New Column Placement for Rejected Contracts (14174)[Enhancement]

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.





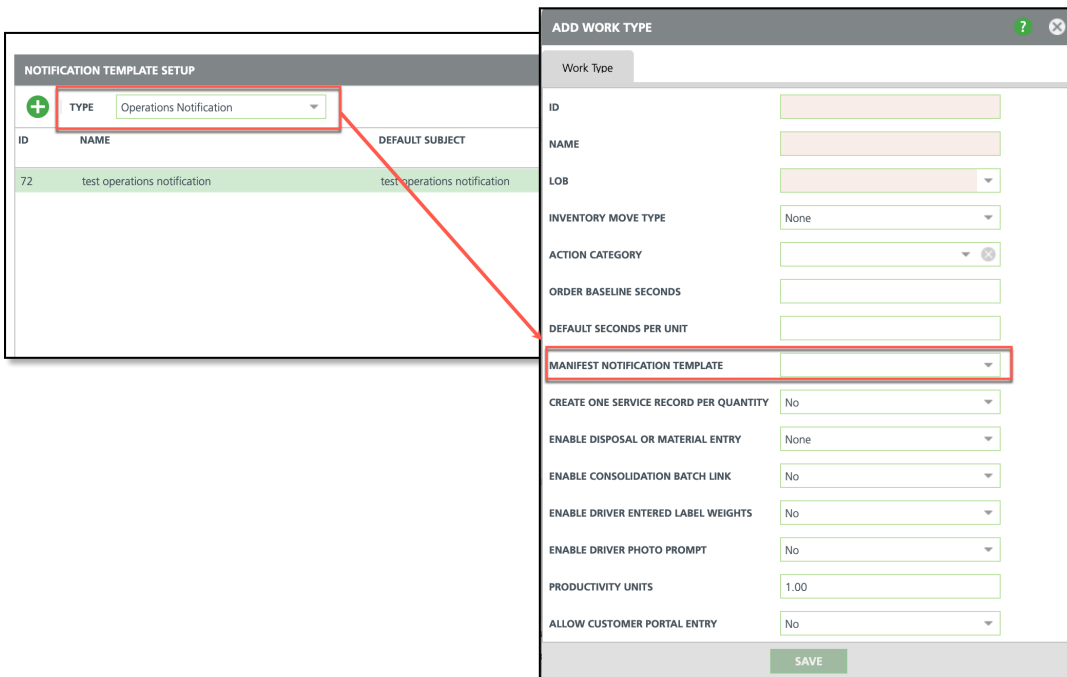




Pathway: Setup > Accounting > Bill Group

## 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.



Pathway: Setup > Operations > Work Type

## Setup (Account) - Additional Option Added to Finance Charge Type (14155)[Enhancement]

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'.

The screenshot shows the 'ADD ACCOUNT CLASS' window with the 'Portal / Payment Processing' tab selected. In the 'Finance Charges / Late Fees' section, the 'FINANCE CHARGE TYPE' dropdown menu is set to 'One Time Fee Per Invoice'. A red box highlights this dropdown, and a red arrow points to the 'RATE' field below it, which now displays '0.00'.

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.

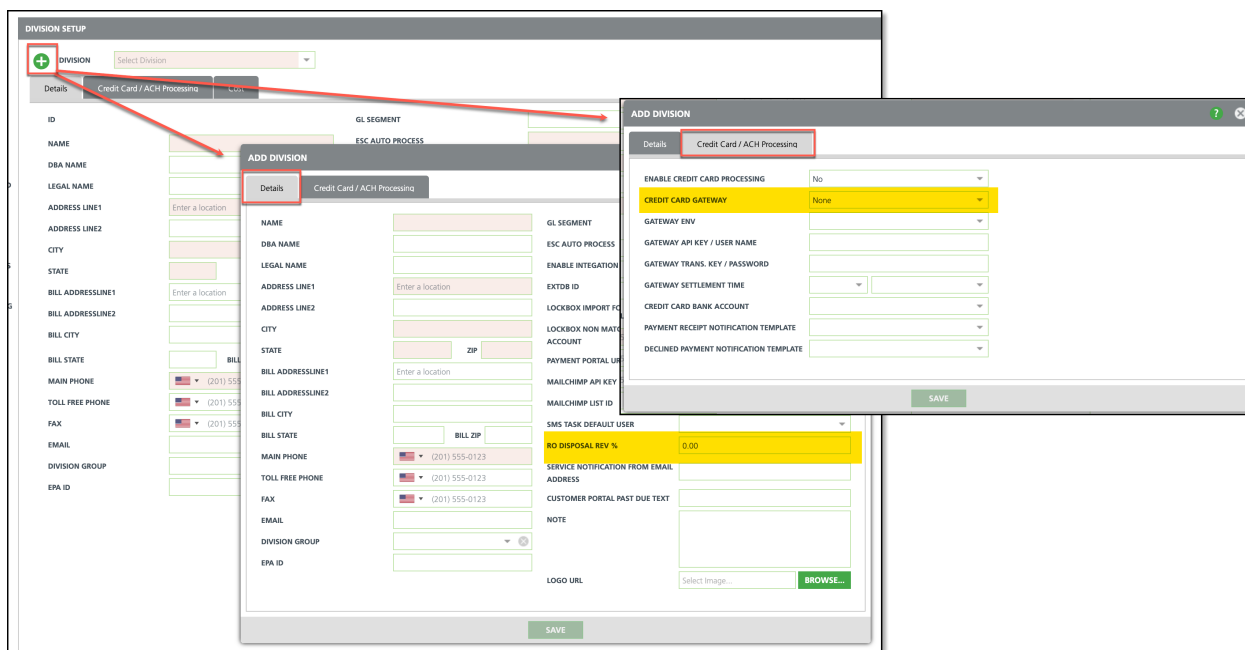
The screenshot shows the 'ADD BILL GROUP' window with the 'Settings' tab selected. The 'ACCOUNT PORTAL URL' field is highlighted with a red box. The 'INVOICE EXPORT FORMAT' dropdown is also highlighted with a red box.

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:

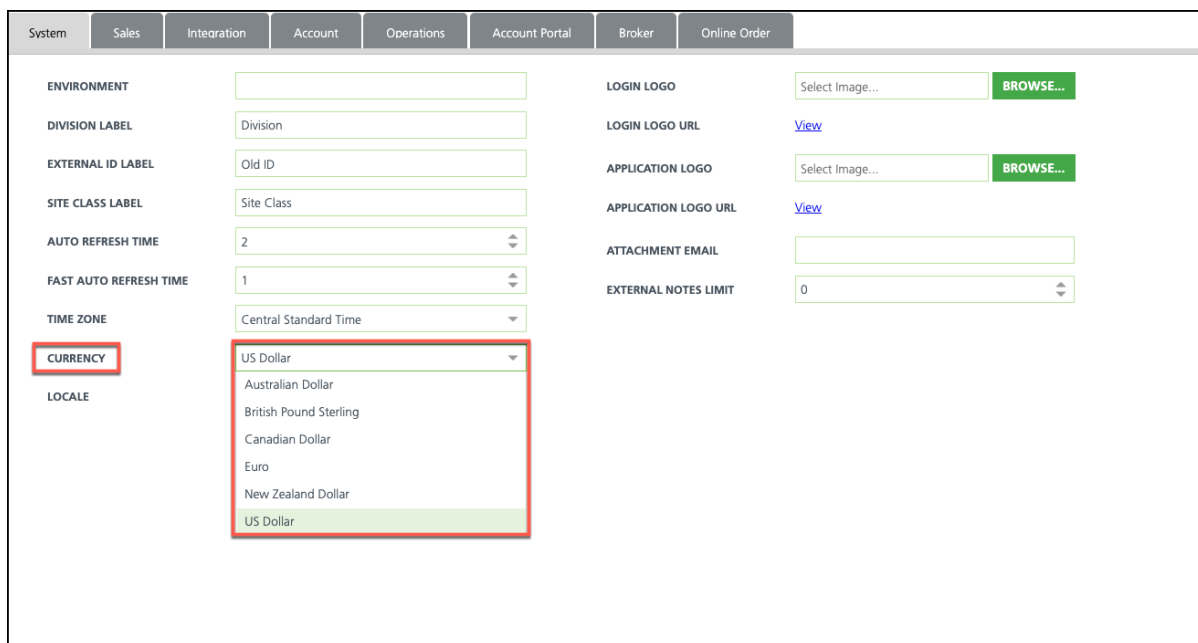
1. RO Disposal Rev % in the Details tab defaults to display '0.00'.
2. Credit Card Gateway in the Credit Card /ACH Processing tab defaults to display 'None'.
  - o When a value other than 'None' is selected, Gateway ENV and Gateway Settlement Time are required fields.



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.



Pathway: *Set Up* > *System* > *System Options*

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