

# Release Version 67 [Archive]

Last Modified on 05/13/2026 2:03 pm PDT



The release notes in this article correspond to version 67. Screens and logic may have changed in newer versions.

Expand All Sections

Collapse All Sections

Helpful Tip: To search all text using **CTRL-F**, you must first click on the Expand All Sections button.

## Home Screen

### Home Display - Display Changes to Notification Icons and Modules (14318)[Enhancement]

Modules and notification icons have been reorganized to display as follows:

1. The **Dashboard** module has been relocated to display under the Reports module.
2. Notification icons specific to a user's system have been moved to the left side of the screen. These include: Account Request, Tasks, Appointments, Cancellations, Snoozed Alerts, and Recent Activity.

The screenshot displays the Home Screen interface. On the left is a vertical navigation menu with icons for HOME, ACCOUNTS, SALES, OPERATIONS, ACCOUNTING, REPORTS, DASHBOARD, SETUP, and DATABASE. The DASHBOARD icon is highlighted with a red box and a '1' callout. At the top, there is a horizontal navigation bar with icons for ACCOUNT REQUESTS, TASKS (with a '2' callout), QUOTES/CONTRACTS, APPOINTMENTS, and ACTIVITIES. The ACTIVITIES section is expanded to show a table of recent activities. In the top right corner, there are three notification icons, with the first one highlighted by a red box and a '3' callout.

DATE	TIME	ACTIVITY	ALERTS	ACTIVITIES	VIEWS
Wed 11/02/22	1:17 am to 11:49 am		0 Alerts	0 Activities	2 Views
	11:49 am	Site Viewed			
	1:17 am	Site Viewed			
		GARRISON			
		CITY OF OLDSMAR			
Wed 10/26/22	12:37 pm to 12:37 pm		0 Alerts	0 Activities	1 Views
	12:37 pm	Site Viewed			
		CAVENDERS BOOT CITY			

Pathway: Home Page

## Accounts

### Accounts - Parent And Child Account Edit Service Record (14366)

Previously, an issue was occurring when using the Edit Service Record tool switching between Parent and Child

Work Orders. The issue has been fixed so now when the child work order is opened the parent closes and when the parent work order is opened the child closes.

Pathway: Accounts > Search > Account

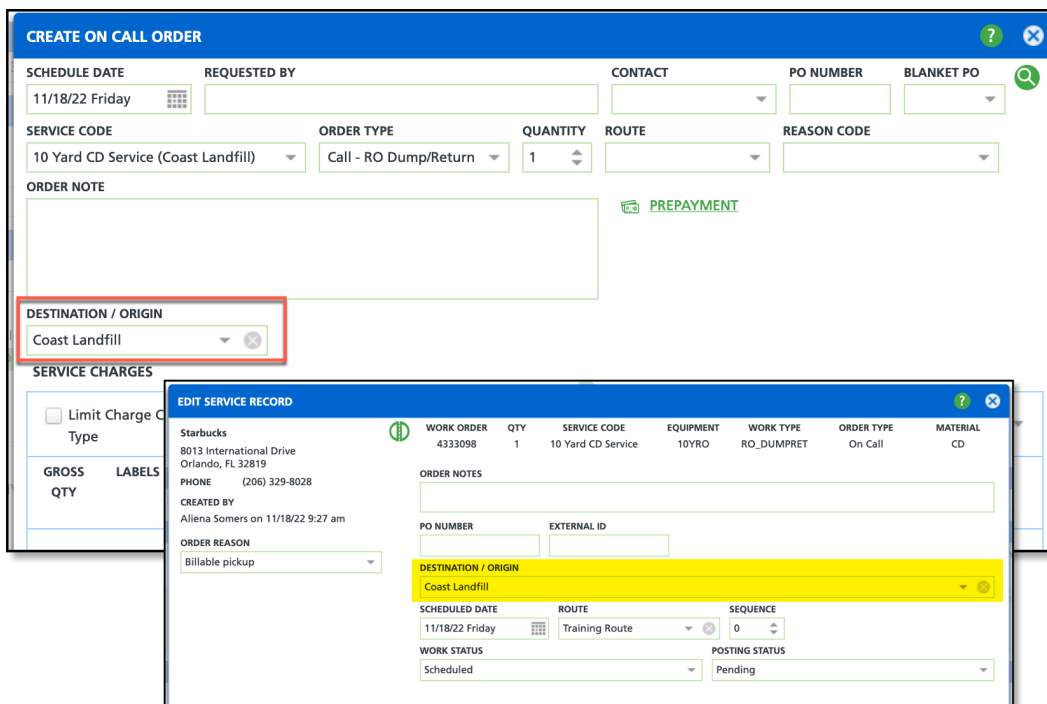
### Accounts - Credit Card Payment Receipt and Declines Updated to Use Division Email (14689)

Core and Account Portal logic has been updated to display the Division email as the 'From' address for credit card payment receipts and decline emails.

Pathway: Accounts; Portal Payments

### Accounts (On Call Orders) - Logic Updated to Destination/Origin Field (14342)[Enhancement]

Previously, if a Service Code had Default Destination enabled, the Destination/Origin field in the 'Create On Call Order' screen was required in order to save. Logic has been updated to remove the requirement and also allow for editing or clearing of the default destination on the Service Detail screen.



Pathway: Accounts > Search > Add On Call Order

### Account Calendar - Logic Updated for System Processed and Manually Sent Emails/Texts (14484)

Logic updates have been made to how Email and Text messages display on the calendar. Previously, there was a difference in how emails displayed when viewing the calendar in grid view vs list view. In addition, if an email/text fails to send a status indicator has been added to the display. Hover over the status to display the reason for the failure in the tool tip popup. In the example below, the email icon displays red to indicate the email failed to send.

0	Dec 1	Dec 2	Dec 3
7	Dec 8	Dec 9	Dec 10
4	Dec 15	Dec 16	Dec 17
1	Dec 22	Dec 23	Dec 24
8	Dec 29	Dec 31	

Service Rescheduled

Christmas

Auto Payment Change

CC/ACH Payment Receipt

+5

Email address is not verified. The following identities failed the check in region US-EAST-1:  
 (Service: AmazonSimpleEmailServiceV2; Status Code: 400; Error Code: MessageRejected; Request ID: c3804a42-9ff2-4c33-bdda-938cd6b79742; Proxy: null)Dear 4512 -

There has been a change to your automatic payment method.

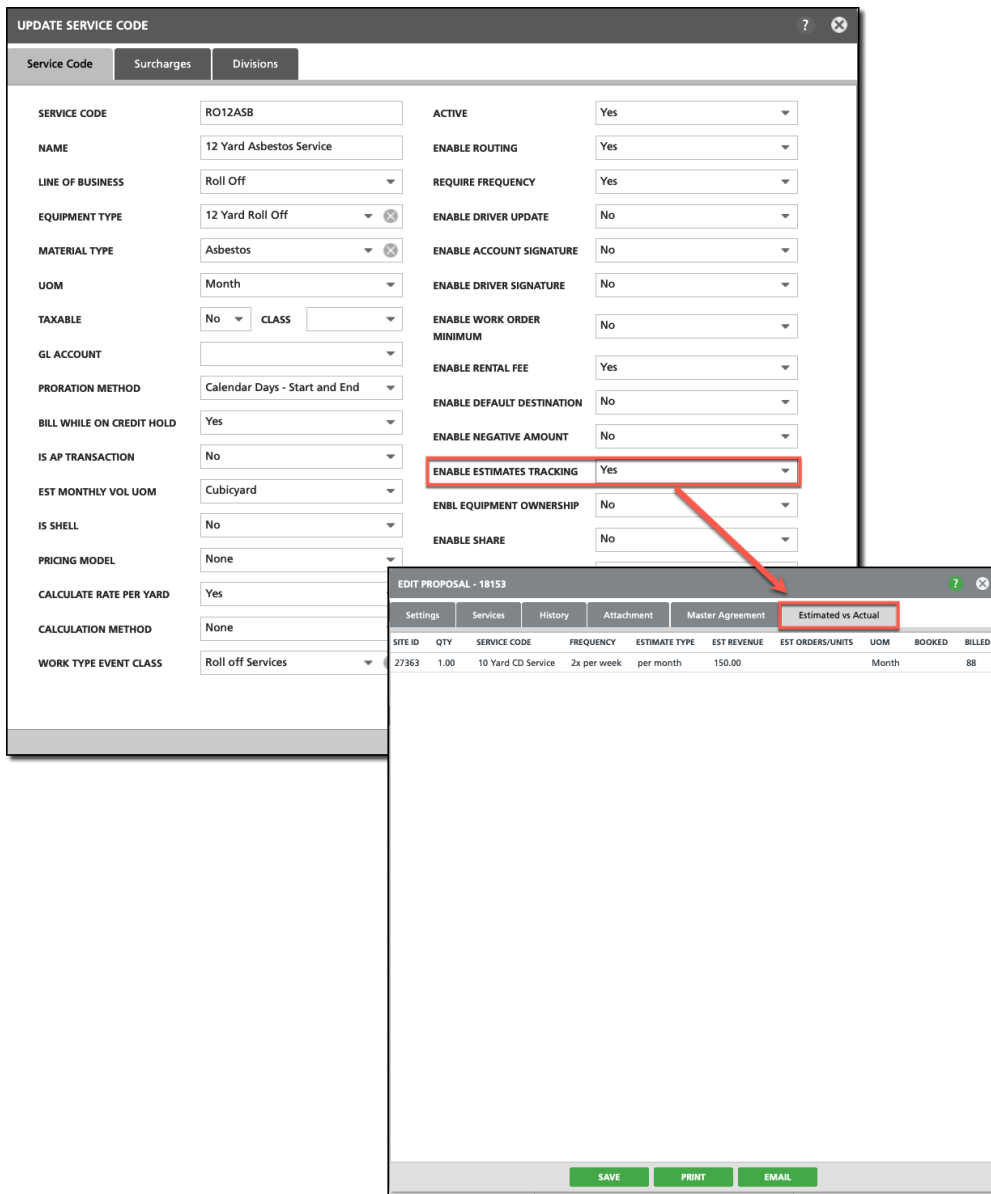
will see if this is sending when i expect it toooooo

From: :  
 Sent to: loris@navusoft.com

Pathway: Accounts > Account Calendar

### Proposals - Display Estimated vs. Actual Tab in Proposals (14247) [Enhancement]

An option to *Enable Estimates Tracking* has been added to Service Code setup. When the Enable Estimates Tracking field is set to 'Yes', an *Estimated vs. Actual* tab displays for Proposals.

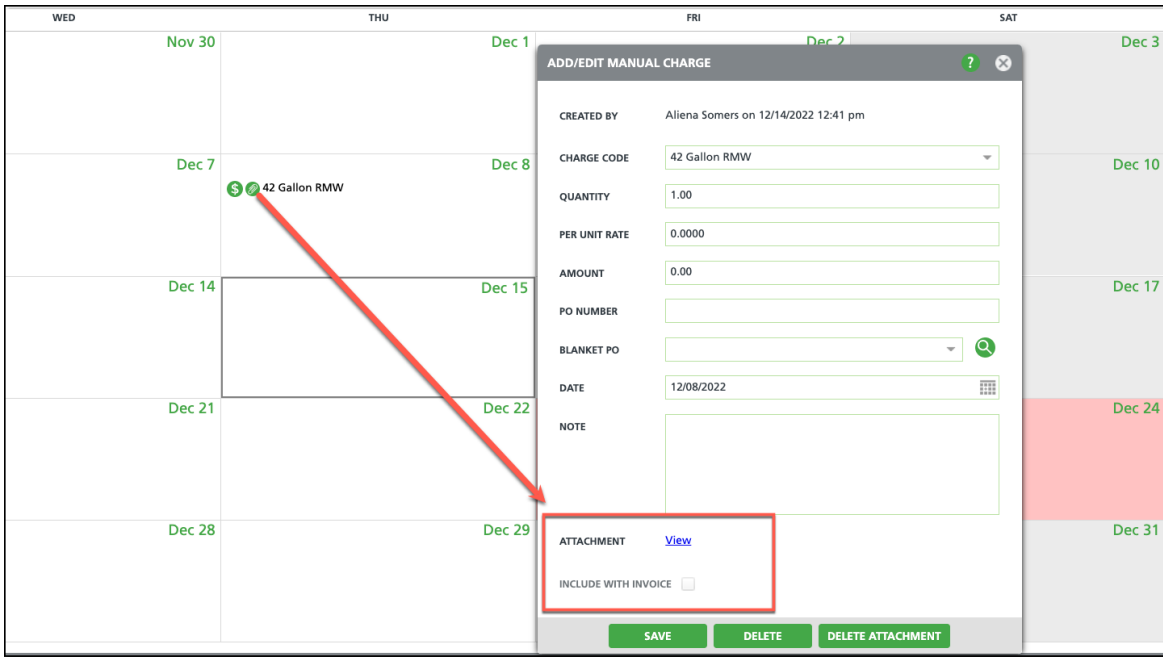


Pathway: Accounts > (Select Account) > (Select Proposal to Edit Proposal)

## Accounts (Manual Charges) - 'Include With Invoice' Option Added for Attachments (14492)[Enhancement]

Functionality has been added to Manual Charges for uploaded Attachments. The option 'Include With Invoice' is now available and will append the attachment to the invoice if selected. In addition, when an attachment has been added, a paperclip icon displays on the date selected for the Manual Charge. Hover over the icon to preview the attachment, or select it to open and view.

Supported File Formats: PDF, JPG, PNG

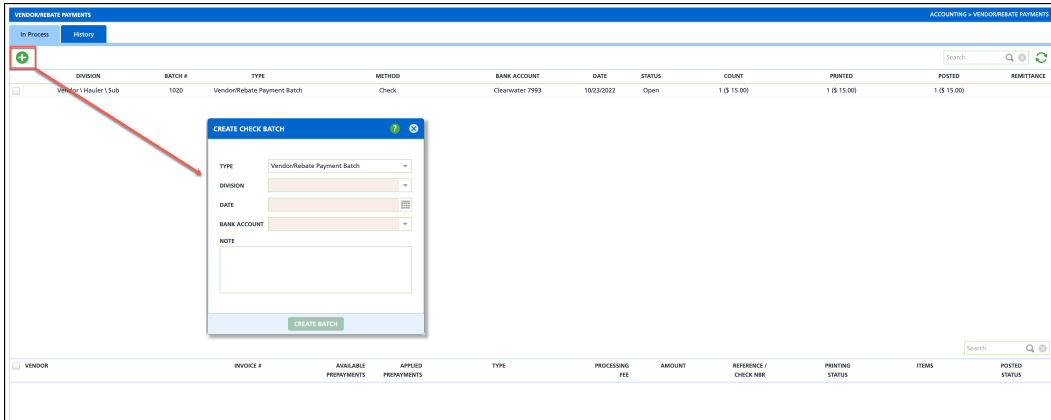


Pathway: Accounts > Search > Account

## Accounting

### Accounting (Vendor/Rebate Payments) - Create AP Check Batch (14255)[Enhancement]

To create a new check batch, select the green '+' icon. Upon completing the required fields and selecting 'Create Batch', one batch will be created for each Type and include anything not included in a previous batch.



Pathway: Accounting > Vendor/Rebate Payments - Create Check Batch

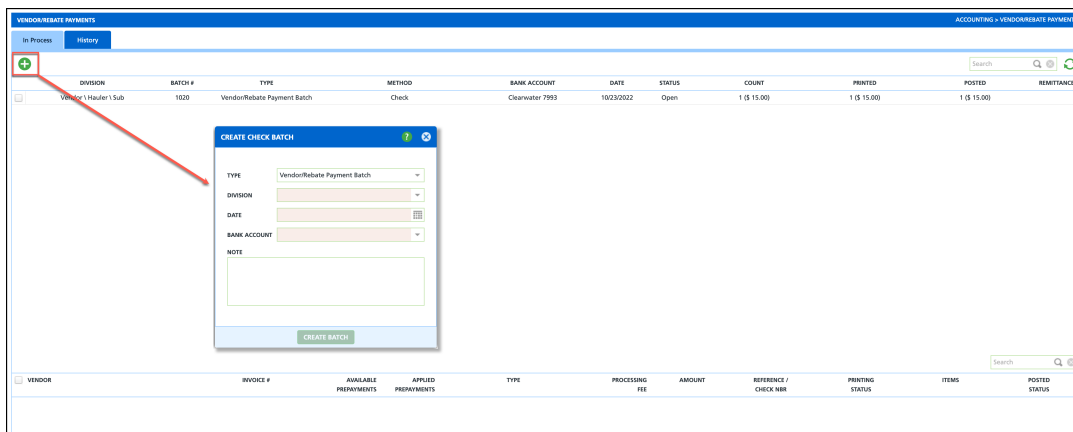
### Accounting (AR Payment Batch) - AR Payment Batch Lock Box Import (14541)

An enhancement has been made to Lock Box Import Format 3. If an imported record has a letter in the account ID field (1st column), the import will match on the account's old ID. Otherwise matches on the Navusoft Account ID. If the imported record has a letter in the invoice field (column 2), it will match on the imported AR ID, otherwise matches on the Navusoft Invoice ID.

Pathway: Accounting > AR Payment Batch

## Accounting (Vendor/Rebate Payments) - Create AP Check Batch (14255)[Enhancement]

To create a new check batch, select the green '+' icon. Upon completing the required fields and selecting 'Create Batch', one batch will be created for each Type and include anything not included in a previous batch.



Pathway: Accounting > Vendor/Rebate Payments - Create Check Batch

## Accounting (Vendor/Rebate Payments) - Screen Enhancements (14256)[Enhancement]

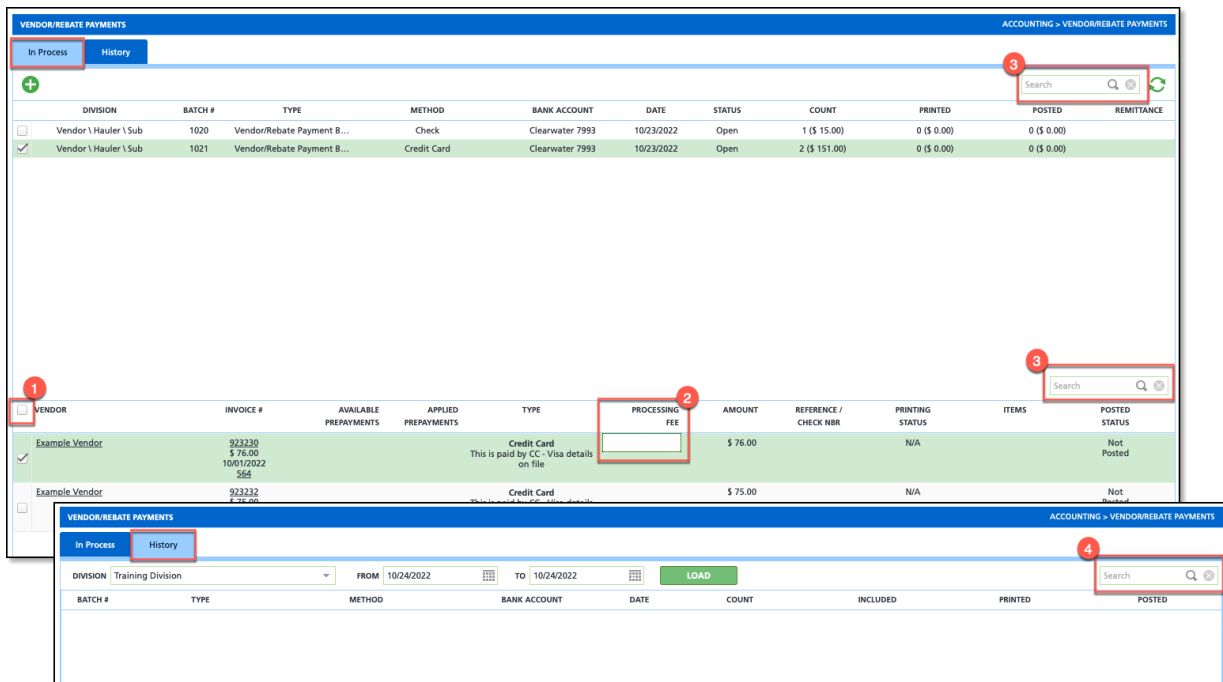
The In Process and History tabs of the Vendor/Rebate Payments tool have been updated with the following enhancements:

### In Process Tab

1. A Select All check box was added to the Vendor selection in the bottom grid.
2. An editable Processing Fee field was added to the vendor rows.
3. A Search box was added to both sections of the In Process screen.

### History Tab

1. A Search box has been added to search the History tab.



Pathway: Accounting > Vendor/Rebate Payments

## Accounting (GL Transaction Processing) - Multiple Enhancements to GL Batch Processing (14409, 14532) [Enhancement]

The following modifications have been made to GL Batch Processing:

- GL Batch Processing has been renamed to GL Transaction Processing.
- The AR Period filter has been relocated to display above the screen tabs and will display "Closed" or "Partially Closed" next to the period selections in the drop down.
  - *Closed* displays next to a period when all divisions are closed.
  - *Partially Closed* display next to a period when one or more (not all) divisions are closed.
- Setup for GL accounts is now reviewed when GL Transaction Processing screen is opened. The Setup Errors will show missing accounts or bad setup that can be reviewed to make necessary changes.
- An Errors column has been added to display an error count and Fix Errors option for transaction batches. These errors are based on current setup. Before selecting 'Fix Errors', review the Setup Errors first. Otherwise, if setup is correct and expected GL changes are correct, the Fix Errors can be used.
- Batches with errors are not able to be included in GL processing.

GL TRANSACTION PROCESSING							
AR PERIOD		LOAD					
Sep 2022		LOAD					
Pending In Progress Posted Summary							
TYPE All Setup Errors (2)							
TYPE	REFERENCE #	AR PERIOD	DATE	COUNT	ERRORS		
<input type="checkbox"/>	Billing Batch	20548	2022-09	09/01/2022	4	4	Fix Errors
<input type="checkbox"/>	Billing Batch	20755	2022-09	09/01/2022	1		
<input type="checkbox"/>	Billing Batch	20756	2022-09	09/01/2022	20		
<input type="checkbox"/>	Billing Batch	20758	2022-09	09/01/2022	4		
<input type="checkbox"/>	Billing Batch	20759	2022-09	09/01/2022	8		
<input type="checkbox"/>	Billing Batch	20761	2022-09	09/01/2022	4		
<input type="checkbox"/>	Billing Batch	20794	2022-09	09/01/2022	3		
<input type="checkbox"/>	Billing Batch	20795	2022-09	09/01/2022	4		
<input type="checkbox"/>	Billing Batch	20796	2022-09	09/01/2022	3		
<input type="checkbox"/>	Billing Batch	20797	2022-09	09/01/2022	3		
<input type="checkbox"/>	Billing Batch	20798	2022-09	09/01/2022	4		

Pathway: Accounting > GL Transaction Processing

### Accounting (Billing) - Vendor Payments Creating Billing Off Scheduled Batch (14276)

Logic has been updated to prevent a 'Billing Off Scheduled' batch from being created after completing a vendor batch.

Vendor	Vendor \ Hauler \ Sub	7734	Off Scheduled	Posted	10/24/2022	1
Vendor	Vendor \ Hauler \ Sub	7735	Off Scheduled	Posted	10/24/2022	1
Vendor	Vendor \ Hauler \ Sub	7736	Off Scheduled	Posted	10/24/2022	1
Vendor	Vendor \ Hauler \ Sub	7738	Off Scheduled	Posted	10/24/2022	1
Vendor	Vendor \ Hauler \ Sub	7740	Off Scheduled	Posted	10/24/2022	1
Vendor	Vendor \ Hauler \ Sub	7741	Off Scheduled	Posted	10/24/2022	1

Pathway: Accounting > Billing

### Accounting (AR Payment Batch) - AR Payment Batch One Bill Batch Per Bill Group (14681)

An enhancement has been made to only allow one bill batch per Bill Group to be posted at a time.

Pathway: Accounting > AR Payment Batch

### Accounting (Vendor Invoice Management) - Logic Updated to Prevent Status Change of a Paid Invoice (14602) [Enhancement]

On the Vendor Invoice screen, a change has been made to disable the ability to update the status of an invoice once the status has been changed to Paid. An error message displays if a user attempts to change it.

**EDIT VENDOR INVOICE**

EXPECTED INVOICE: GFL/ (A3008518) 10/01/22 - 10/31/22 \$ 171.73

VENDOR ID: A3008518

CBRE-UPS-ARLIA//ARLIA - 8yd FL MSW Active  
#1581003  
1 Airport Drive  
Little Rock, AR 72202

INVOICE #: A30000472431

INVOICE DATE: 01/04/2023 DUE DATE: 12/15/2022

SERVICE FROM: 12/01/2022 SERVICE TO: 12/31/2022

INVOICE AMOUNT: 185.06 Expected Invoice Amount \$ 171.73

Vendor Invoice | Linked Account Invoices

ADJUSTMENT: [ ] ADJUSTMENT REASON CODE: [ ]

PAY AMOUNT: 185.06

PERIOD: Dec 2022

NOTES: <https://wasteologygroup.sharepoint.com/b:/r/sites/Production/Discovery%20Invoices/af4ee3f3be8df8544a3b2399fbc8cee3.pdf?cf=1&web=1&e=a7QqUm>

CREDIT INVOICE ID: 303271  
CREDIT INVOICE BALANCE: \$(370.12)  
ACH - Ref # SM-ACH-\$690.25 1/5/2023  
1/5/2023

ADD ATTACHMENTS

STATUS: Approved for Payment Approved On Jan 4, 2023 03:25 pm by Sandee Webb

**ERROR**  
Creation failed:  
Vendor Invoice is not eligible for editing 21427  
OK

Pathway: Accounting > Vendor Invoice Management

### Accounting (Vendor Invoice Management) - Update to the Date Fields (14260)[Enhancement]

The default setting for the *Due Date From* and *Due Date To* fields on the Vendor Invoice Management screen has been updated to display blank.

**VENDOR INVOICE MANAGEMENT**

Pending | History

AUDITOR: All VENDOR: All STATUS: Received, Hold, Waitin... DUE DATE FROM: [ ] DUE DATE TO: [ ]

ACCOUNT	DATE	DUE DATE	INVOICE #	INVOICE AMOUNT	PAY AMOUNT
Example Account	11/01/2022	11/05/2022	24234	\$ 65.00	\$ 65.00

Pathway: Accounting > Vendor Invoice Management

# Operations

## Operations (Resource Calendar) - \*New\* Resource Calendar Available (14386, 14372, 14374, 14485) [Enhancement]

A new Resource Calendar tool has been released in the Operations module under Resource Scheduling. This tool provides dispatch with a high level view of worker availability, route assignment conflicts and displays the current status of a route. Filtering options are located along the top of the screen to limit what displays along with a calendar navigation tool to view current, past and future weeks (current week displays by default).

This tool requires permission 440 (Resource Scheduling) to view and edit. Additional permission setup requirements are outlined in the Logic section of the Resource Calendar article linked below.

### Worker Grid

The Worker section displays each worker's availability and capabilities (the line of business they service) based on what was established in [Worker Availability and Capability](#) AND any Availability Exceptions added in the Worker Calendar. On a day the worker is considered available, the cell will display white and the time frame of availability will populate in blue font. Gray cells indicate the worker is not available and red cells indicate the worker has an availability exception (example: sick on a day they are considered available).

### On Screen Functionality (Worker):

- Select a the worker's name to access their Worker Calendar.
- Right click within a cell to add an Availability Exception for a worker.
- Select a route to open the Edit Route Record popup editor and assign the route to another available resource.

RESOURCE	SUN, NOV 27	MON, NOV 28	TUE, NOV 29	WED, NOV 30	THU, DEC 1	FRI, DEC 2	SAT, DEC 3
<b>Amber Hanson</b> Doc Driver, Helper, Technician Front End Load, Front Load Recycle		5:00 am - 2:00 pm	5:00 am - 2:00 pm	5:00 am - 2:00 pm	5:00 am - 2:00 pm	5:00 am - 2:00 pm	5:00 am - 10:00 am
<b>Barry Anderson</b> Ops Driver, Technician Front End Load, Portable Toilets, Roll Off			6:00 am - 6:00 pm		6:00 am - 6:00 pm Sick		
<b>Brady Scheel</b> Driver Residential	6:00 am - 6:00 pm	6:00 am - 6:00 pm Route 11-203 - Driver	6:00 am - 6:00 pm Route 11-203 - Driver	6:00 am - 6:00 pm Route 11-20903 - Driver	6:00 am - 6:00 pm Route 11-203 - Driver	6:00 am - 6:00 pm Route 11-203 - Driver	6:00 am - 6:00 pm
<b>Brad Sovich</b> Driver, Helper, Technician Residential, Roll Off				6:00 am - 6:00 pm			
<b>Candy Sarah</b> Driver Front End Load, Residential, Roll Off	6:00 am - 6:00 pm	6:00 am - 6:00 pm	6:00 am - 6:00 pm	6:00 am - 6:00 pm	6:00 am - 6:00 pm	6:00 am - 6:00 pm	6:00 am - 6:00 pm
<b>Chris Token</b> Driver Front End Load, Residential, Roll Off	6:00 am - 6:00 pm	6:00 am - 6:00 pm	6:00 am - 6:00 pm	6:00 am - 6:00 pm Route 11-20901 - Driver	6:00 am - 6:00 pm	6:00 am - 6:00 pm	6:00 am - 6:00 pm
<b>Chuck Morson</b> Spu - Driver Driver, Technician Portable Toilets, Roll Off				6:00 am - 2:00 pm		6:00 am - 6:00 pm Route 02-301 - Driver	
<b>Cynthia Murdock</b> Driver Portable Toilets, Roll Off		6:00 am - 2:00 pm Route 02-604 - Driver	6:00 am - 2:00 pm Route 02-604 - Driver	6:00 am - 2:00 pm Route 02-604 - Driver		6:00 am - 6:00 pm Route 02-604 - Driver	6:00 am - 6:00 pm Route 02-604 - Driver
<b>Dana Smith</b>							

Pathway: [Operations](#) > [Resource Scheduling](#) > [Resource Calendar](#)

Articles: [Resource Calendar](#); [Worker Availability and Capability](#)

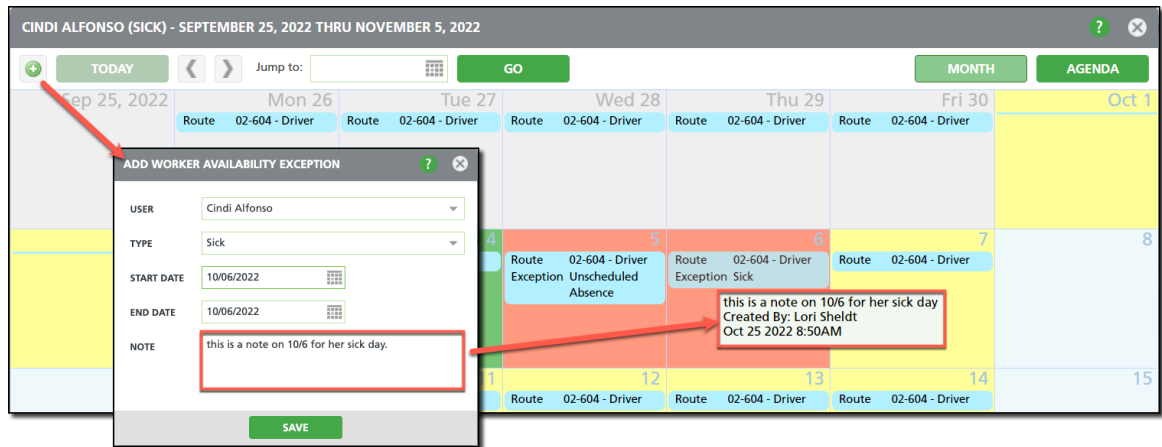
## Operations (Dispatch) - Worker Availability Exceptions (14221, 14222)[Enhancement]

The Worker Calendar has been updated to display the note added in the [Worker Availability Exception](#) upon hovering over the exception in the calendar.

Add a Worker Availability Exception:

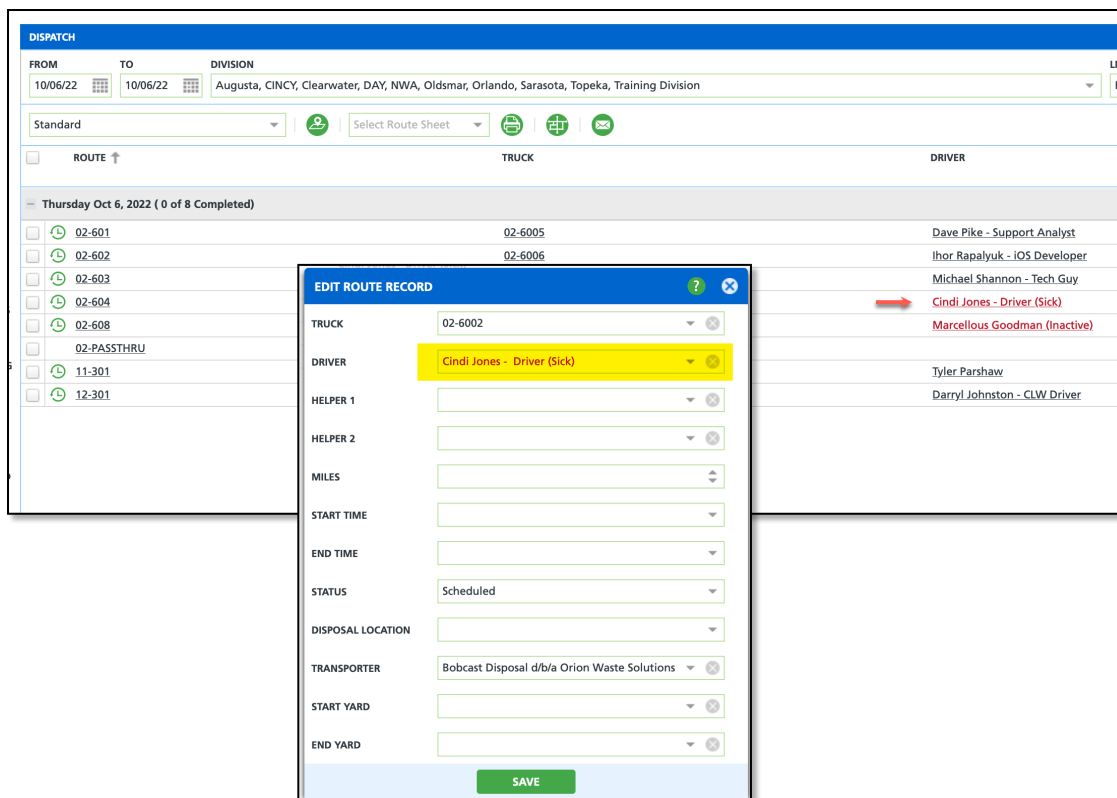
1. Click on the + icon to open tool.

2. Select the Type of worker availability exception.
3. Select a Start Date the exception will begin.
4. Select an End Date the exception will end.
5. Add a Note with details or a summary of the exception. Hover over the exception in the calendar to display the note.
6. Select Save to apply.



## Worker Name Display Updated to Reflect Availability Exception (14222)

In Dispatch, if a worker has an Availability Exception, their name will display in red font followed by the exception type in parenthesis. Availability Exceptions are only indicators of a worker's availability and do not prevent a worker from being assigned to a route.



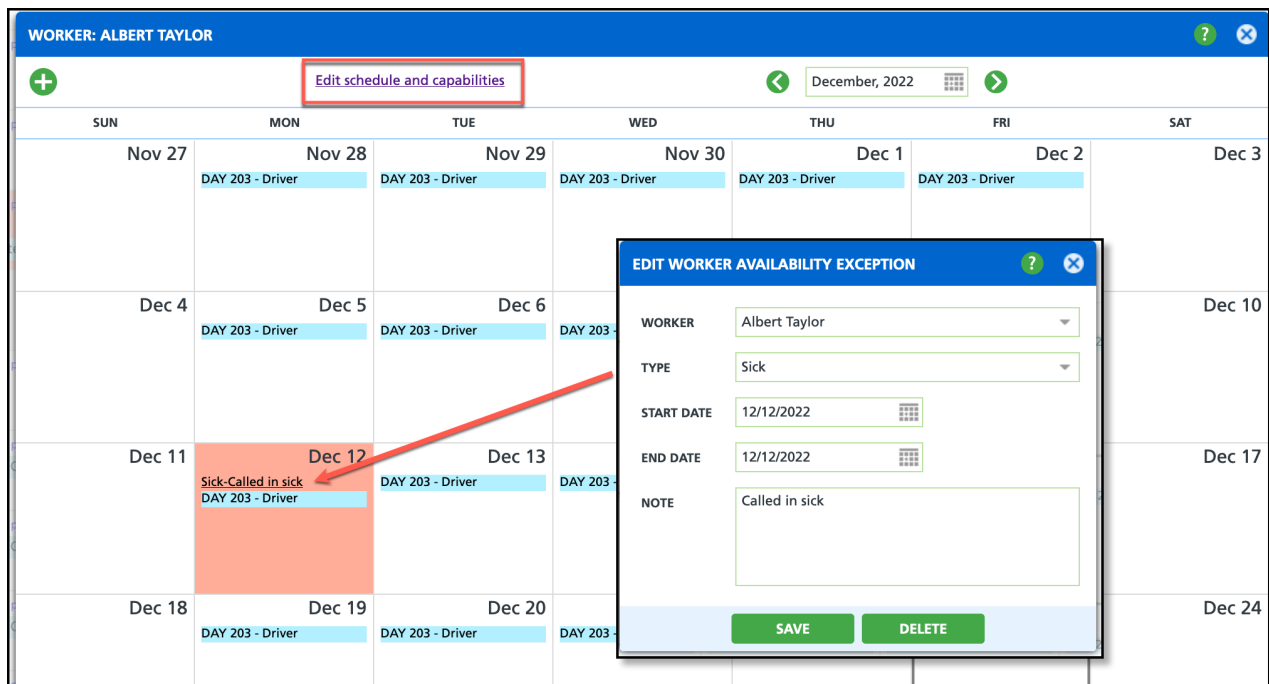
Pathway: *Operations > Dispatch > (Select Drivers Name)*

### Operations (Resource Scheduling) - Worker Calendar Functionality Updates (14373, 14556, 14531) [Enhancement]

The following functionality updates have been added to the Worker Calendar:

- New right click functionality has been added to the Worker Calendar with a single 'Add Availability Exception' option. When the exception includes a note, the note will display on the calendar after the exception type. Hover over the note to view it in full. Exceptions display as a hyperlink and will open the 'Edit Worker Availability Exception' when selected.
- An 'Edit Schedule and Capabilities' link has been added above the calendar display in the Worker Calendar. When selected, the Worker Availability and Capability screen will open. After edits are made to the worker's availability/capability, use the Back button located in the Index to return to the Worker Calendar. Upon return, the calendar will update reflecting the recent change.

The Worker Calendar is accessible through *Operations > Dispatch* tools and the new *Operations > Resource Scheduling* tools.



Pathway: *Operations > Resource Scheduling > Worker Availability and Capability* - Select worker's name to open Worker Calendar; *Operations > Dispatch* - Select worker's name to open Worker Calendar

### Operations (Resource Scheduling) - \*New\* Worker Availability and Capability (14138, 14223) [Enhancement]

A new *Worker Availability and Capability* tool is available in the Operations module. The Worker Availability and Capability tool is used to establish daily time frames a worker is available to be assigned to a route and identify what a workers capabilities are (Residential, Roll Off, Front End Load and etc.). Once an availability record has been created for a worker, it does not need to be updated unless the worker's availability, or capabilities have changed. Times added here will translate across to other tools such as Dispatch and the Resource Calendar.

WORKER AVAILABILITY AND CAPABILITY											
<div style="display: flex; justify-content: space-between; align-items: center;"> <span>+</span> <span>DIVISION All</span> <span>DEPARTMENT All</span> <span>Search</span> </div>											
NAME ↑	CAPABILITIES	TYPE	EFFECTIVE DATE	END DATE	SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
Worker 1 Example Doc	Front End Load, F...	Weekly	02/02/2022	02/28/2022		7:00 am - 3:00 pm 8 hours	7:00 am - 4:00 pm 9 hours		7:00 pm - 3:00 am 8 hours		
Worker 1 Example Doc	Front End Load, F...	Weekly	03/01/2022			8:30 am - 3:30 pm 7 hours					
Worker 2 Example A/R	Residential	Weekly	01/01/2022			6:00 am - 2:00 pm 8 hours	6:00 am - 4:00 pm 10 hours		6:00 am - 4:00 pm 10 hours	6:00 am - 2:00 pm 8 hours	
Worker 3 Example Ops	Front End Load, P...	Weekly	01/01/2022				6:00 am - 6:00 pm 12 hours		6:00 am - 6:00 pm 12 hours		
Worker 4 Example Driver	Residential	Weekly	01/01/2021		6:00 am - 6:00 pm 12 hours	6:00 am - 6:00 pm 12 hours	6:00 am - 6:00 pm 12 hours	6:00 am - 6:00 pm 12 hours	6:00 am - 6:00 pm 12 hours	6:00 am - 6:00 pm 12 hours	6:00 am - 6:00 pm 12 hours
Worker 5 Example Driver	Residential, Roll Off	Weekly	01/01/2022					6:00 am - 6:00 pm 12 hours			
Worker 6 Example Driver	Front End Load, ....	Weekly	01/01/2021		6:00 am - 6:00 pm 12 hours	6:00 am - 6:00 pm 12 hours	6:00 am - 6:00 pm 12 hours	6:00 am - 6:00 pm 12 hours	6:00 am - 6:00 pm 12 hours	6:00 am - 6:00 pm 12 hours	6:00 am - 6:00 pm 12 hours
Worker 7 Example Driver	Front End Load, ....	Weekly	01/01/2021		6:00 am - 6:00 pm 12 hours	6:00 am - 6:00 pm 12 hours	6:00 am - 6:00 pm 12 hours	6:00 am - 6:00 pm 12 hours	6:00 am - 6:00 pm 12 hours	6:00 am - 6:00 pm 12 hours	6:00 am - 6:00 pm 12 hours
Worker 8 Example VP of Sales	Front End Load, ....	Weekly	01/01/2022				6:00 am - 6:00 pm 12 hours			6:00 am - 6:00 pm 12 hours	
Worker 9 Example Spv - Driver	Portable Toilets, ....	Weekly	10/25/2022					6:00 am - 2:00 pm 8 hours			
Worker 10 Example Driver	Portable Toilets, ....	Weekly	10/01/2022	10/07/2022		6:00 am - 11:00 am 5 hours	6:00 am - 9:00 am 3 hours		6:00 am - 9:00 am 3 hours		

## Edit an Existing Record

Upon installation, worker availability will populate based on historical route data for existing workers. Review each worker to verify their availability is correct. When a new worker is added in the system a worker availability record should be created as well; availability is not system generated.

If the days and times do not correctly reflect a workers availability, double click within the row of the worker to open the Edit Worker Availability popup editor and apply changes. Workers may have more than one record if they have different availability for Odd/Even weeks or if they have a history of end dated availability.

WORKER AVAILABILITY AND CAPABILITY											
<div style="display: flex; justify-content: space-between; align-items: center;"> <span>+</span> <span>DIVISION All</span> <span>DEPARTMENT All</span> <span>Search</span> </div>											
NAME ↑	CAPABILITIES	TYPE	EFFECTIVE DATE	END DATE	SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
Worker 1 Example Doc	Front End Load, F...	Weekly	02/02/2022	02/28/2022			7:00 am - 3:00 pm 8 hours	7:00 am - 4:00 pm 9 hours			7:00 pm - 3:00 am 8 hours
Worker 1 Example Doc	Front End Load, F...	Weekly	03/01/2022				8:30 am - 3:30 pm 7 hours				
Worker 2 Example A/R	Residential	Weekly	01/01/2022			6:00 am - 2:00 pm 8 hours	6:00 am - 4:00 pm 10 hours		6:00 am - 4:00 pm 10 hours	6:00 am - 2:00 pm 8 hours	
Worker 3 Example Ops	Front End Load, P...	Weekly	01/01/2022				6:00 am - 6:00 pm 12 hours		6:00 am - 6:00 pm 12 hours		
Worker 4 Example Driver	Residential	Weekly	01/01/2021		6:00 am - 6:00 pm 12 hours	6:00 am - 6:00 pm 12 hours	6:00 am - 6:00 pm 12 hours	6:00 am - 6:00 pm 12 hours	6:00 am - 6:00 pm 12 hours	6:00 am - 6:00 pm 12 hours	6:00 am - 6:00 pm 12 hours
Worker 5 Example Driver	Residential, Roll Off	Weekly	01/01/2022					6:00 am - 6:00 pm 12 hours			
Worker 6 Example Driver	Front End Load, ....	Weekly	01/01/2021		6:00 am - 6:00 pm 12 hours	6:00 am - 6:00 pm 12 hours	6:00 am - 6:00 pm 12 hours	6:00 am - 6:00 pm 12 hours	6:00 am - 6:00 pm 12 hours	6:00 am - 6:00 pm 12 hours	6:00 am - 6:00 pm 12 hours
Worker 7 Example Driver	Front End Load, ....	Weekly	01/01/2021		6:00 am - 6:00 pm 12 hours	6:00 am - 6:00 pm 12 hours	6:00 am - 6:00 pm 12 hours	6:00 am - 6:00 pm 12 hours	6:00 am - 6:00 pm 12 hours	6:00 am - 6:00 pm 12 hours	6:00 am - 6:00 pm 12 hours
Worker 8 Example VP of Sales	Front End Load, ....	Weekly	01/01/2022				6:00 am - 6:00 pm 12 hours			6:00 am - 6:00 pm 12 hours	
Worker 9 Example Spv - Driver	Portable Toilets, ....	Weekly	10/25/2022					6:00 am - 2:00 pm 8 hours			
Worker 10 Example Driver	Portable Toilets, ....	Weekly	10/01/2022	10/07/2022		6:00 am - 11:00 am 5 hours	6:00 am - 9:00 am 3 hours		6:00 am - 9:00 am 3 hours		

**EDIT WORKER AVAILABILITY**

WORKER: Worker 1 Example (Doc)

TYPE: Weekly

EFFECTIVE DATE: 03/01/2022

END DATE: [Calendar Icon]

SUNDAY START: [Dropdown] HOURS: [Spinner]

MONDAY START: 8:30 AM HOURS: 7

TUESDAY START: [Dropdown] HOURS: [Spinner]

WEDNESDAY START: [Dropdown] HOURS: [Spinner]

THURSDAY START: [Dropdown] HOURS: [Spinner]

FRIDAY START: [Dropdown] HOURS: [Spinner]

SATURDAY START: [Dropdown] HOURS: [Spinner]

Saved.

## Worker Availability in Dispatch (14223)

The Dispatch tool reflects worker availability by displaying an unavailable worker's name in red followed by (Not Available). This is only an indicator of a worker's availability and does not prevent an unavailable worker from being assigned to a route.

**DISPATCH**

FROM: 11/07/22 TO: 11/07/22 DIVISION: Augusta, Clearwater, NWA, Oldsmar, Orlando, Sarasota, Topeka, Training Division LINE OF BUSINESS: Roll Off, Residential

Standard Select Route Sheet

ROUTE TRUCK DRIVER PRE TRIP POST TRIP OPTIMIZED

Monday Nov 7, 2022 ( 0 of 13 Completed)

11-201	360	Edward Smith - Driver (Sick)
11-202	20014	David Johnson - Driver
11-203	20012	Bill
11-204	20015	Luis
11-205	20072	He
11-208		
11-301	30005	Tyle
12-201	20074	Eri
12-202	20076	Wil
12-20901	20075	Sad
12-301	30068	Dan
P-205	Rental REL1	Nav

**EDIT ROUTE RECORD**

TRUCK: 360

DRIVER: Edward Smith - Driver (Sick)

HELPER 1: Myriam Jones - Operations Specialist (Not Available)

HELPER 2: Navusoft, Navusoft m, Nelson Pearce

MILES: Olivia Paige - Mobile Engineer

START TIME: Orion Sandbox

END TIME: Pat Cartalemi - Project Manager (Not Available)

STATUS: Rafael Hernandez

DISPOSAL LOCATION: Robert Zander - Driver, Ruben Zelders (Not Available)

TRANSPORTER: Sadiqa Robins - Driver

START YARD: [ ]

END YARD: [ ]

SAVE

### Worker Availability in Resource Calendar

The Resource Calendar provides a high-level view of worker resources, current route status and worker availability exceptions. In addition, this tool also includes functionality to edit route records and worker availability exceptions.

**RESOURCE CALENDAR**

DIVISION: Augusta, CINC, Clearwater, DAY, NWA, Oldsmar, Orlando, Sarasota LINE OF BUSINESS: Front End Load, Industrial, Landfill and Transfer, Medical Waste, Po

Week 46 (8) November, 2022

RESOURCE	SUN, NOV 6	MON, NOV 7	TUE, NOV 8	WED, NOV 9	THU, NOV 10	FRI, NOV 11	SAT, NOV 12
Edward Langley Driver Front End Load, Residential, Transfer	6:00 am - 6:00 pm	6:00 am - 6:00 pm Sick	6:00 am - 6:00 pm	6:00 am - 6:00 pm Route 11-20902 - Driver	6:00 am - 6:00 pm Day Off Route 11-201 - Driver	6:00 am - 6:00 pm Route 11-201 - Driver	6:00 am - 6:00 pm
Emilio Natarén A/P Driver, Helper, Worker Front End Load		6:00 am - 2:00 pm		6:00 am - 2:00 pm	Route 04-103 - Driver	Route 04-103 - Driver	Route 04-103 - Driver
Eric Neils Driver Residential		6:00 am - 6:00 pm Route 12-201 - Driver	6:00 am - 6:00 pm Route 12-201 - Driver	6:00 am - 6:00 pm Route 12-201 - Driver	6:00 am - 6:00 pm Route 12-201 - Driver	6:00 am - 6:00 pm Route 12-201 - Driver	6:00 am - 6:00 pm Route 12-201 - Driver
Eric Richards Driver Front End Load, Roll Off		6:00 am - 6:00 pm	6:00 am - 6:00 pm	6:00 am - 6:00 pm	6:00 am - 6:00 pm	6:00 am - 6:00 pm Route 02-301 - Driver	6:00 am - 12:00 pm
Hector Castle Driver Front End Load, Residential, Roll Off	6:00 am - 6:00 pm	6:00 am - 6:00 pm Route 11-205 - Driver	6:00 am - 6:00 pm	6:00 am - 6:00 pm Route 11-20905 - Driver	6:00 am - 6:00 pm Route 11-205 - Driver	6:00 am - 6:00 pm	6:00 am - 6:00 pm
Holley Pate Director of Implementation Driver, Helper, Worker Roll Off							
Ihor Dory IOS Developer Driver, Helper, Worker Portable Toilets	6:00 am - 6:00 pm	6:00 am - 6:00 pm	6:00 am - 6:00 pm	6:00 am - 6:00 pm	6:00 am - 6:00 pm	6:00 am - 6:00 pm Route 02-602 - Driver	6:00 am - 6:00 pm
Irmgard Ono Worker Driver, Worker Roll Off		8:00 am - 4:00 pm	8:00 am - 4:00 pm	8:00 am - 4:00 pm	8:00 am - 4:00 pm	8:00 am - 4:00 pm	
Isabel Navarro Intern Driver, Helper, Worker Residential		8:00 am - 2:00 pm			8:00 am - 2:00 pm		
James Bond Driver Front End Load		6:00 pm - 6:00 am Route 02-601 - Driver	6:00 pm - 6:00 am Route 02-601 - Driver	Route 02-601 - Driver	Route 02-601 - Driver		

Pathway: Operations > Resource Scheduling > Worker Availability and Capability; Operations > Resource Calendar

## Operations (Edit Service Record) - Labor Tab Logic (14224)[Enhancement]

The Labor tab uses the following logic to populate technicians:

- Technicians who are Active display.
- Technicians assigned permission 313 (Permission to be assigned as a crew member or labor/technician) display.
- Technicians who have access to the same division as the service record display.
- Technicians who are inactive, but had previously assigned recorded hours display.
- If the technician has an availability exception, it will display after the technician's name and title. The name, title and the exception will display red.

To gather all recently added technicians, the Technician list is loaded at the time the Service Record is opened.

EDIT SERVICE RECORD
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<p><b>Example Account</b> 123 Navu Ave W</p> <p>Largo, FL 33773-1649</p> <p>PHONE +1 555-555-1234</p> <p>CREATED BY Lori Sheldt on 11/2/22 4:00 pm</p> <p>ORDER REASON <input type="text"/></p> <p>ACCESS</p> <p>SITE NOTE</p> <p>SVC NOTE</p>	<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 15%;"><b>WORK ORDER</b></td> <td style="width: 10%;">4261991</td> <td style="width: 5%;"><b>QTY</b></td> <td style="width: 5%;">1</td> <td style="width: 25%;"><b>SERVICE CODE</b></td> <td>8 Yard OCC Service</td> <td style="width: 10%;"><b>EQUIPMENT</b></td> <td>8Y</td> <td style="width: 10%;"><b>WORK TYPE</b></td> <td>FL_EXTRAPU</td> <td style="width: 10%;"><b>ORDER TYPE</b></td> <td>On Call</td> <td style="width: 10%;"><b>MATERIAL</b></td> <td>CARDBOARD</td> </tr> </table> <p><b>ORDER NOTES</b></p> <div style="border: 1px solid #ccc; height: 20px; width: 100%;"></div> <p><b>PO NUMBER</b> <input type="text"/> <b>EXTERNAL ID</b> <input type="text"/></p> <p><b>DESTINATION / ORIGIN</b> One Stop Landscape <input type="text"/></p> <p><b>SCHEDULED DATE</b> <input type="text" value="11/23/22 Wednesday"/> <b>ROUTE</b> <input type="text" value="11-100"/> <b>SEQUENCE</b> <input type="text" value="0"/></p> <p style="font-size: 0.8em;">Originally scheduled Thursday 11/3/22 rescheduled by Lori Sheldt on 11/28/22 10:27 am</p> <p><b>WORK STATUS</b> <input type="text" value="Scheduled"/> <b>POSTING STATUS</b> <input type="text" value="Pending"/></p>	<b>WORK ORDER</b>	4261991	<b>QTY</b>	1	<b>SERVICE CODE</b>	8 Yard OCC Service	<b>EQUIPMENT</b>	8Y	<b>WORK TYPE</b>	FL_EXTRAPU	<b>ORDER TYPE</b>	On Call	<b>MATERIAL</b>	CARDBOARD
<b>WORK ORDER</b>	4261991	<b>QTY</b>	1	<b>SERVICE CODE</b>	8 Yard OCC Service	<b>EQUIPMENT</b>	8Y	<b>WORK TYPE</b>	FL_EXTRAPU	<b>ORDER TYPE</b>	On Call	<b>MATERIAL</b>	CARDBOARD		

Completion Data
Charges
Attachments
Labels
Labor
Photos 1

TECHNICIAN	SCHEDULED HOURS	ACTUAL HOURS	NOTES
Amber Freed - Technician			
Ben Smith - Technician (Not Available)			
Charles Pacson - Technician			
Dale Schmidt - Technician (Not Available)			
Dan Orlando - Technician Supervisor			
Dave Pike - Technician			
Derek Jeter - Technician			
Holley Pate - Technician			
Lori Sheldt - Technician (Not Available)			
Michael Jones (Not Available)			
William Thompson - Technician (Not Available)			

## Operations (Dispatch) - Selection Views Added to Customer Service History and Updates to Dispatch Views (14479) [Enhancement]

The following changes have been made to the Dispatch and Customer Service History tools:

1. A view selection has been added to the Customer Service History section of the Accounts screen. Selection options here are similar to what is available in Dispatch.
2. Billing 2 has been removed as a view option in Dispatch and a Recurring Revenue column was added to the

Billing view.

- The 'PO Number' column has been removed from the Dispatch and Customer Service History views and replaced with a 'PO / Blanket PO' column.

ROUTE	ORDER NOTE	SCHEDULED DATE	CREATED ON	WOP	WOP TYPE	SERVICE TYPE	QTY	EQUIPMENT	PO / BLANKET PO	PHOTOS
1153		Wed 9/21/22	8/12/22 3:00am	3848823	Scheduled Service	FL Service	1	6 Yard		
		Thu 9/22/22	9/22/22 9:33am	4067752	On Call	FL Extra Pick Up	1	6 Yard		
1153		Wed 9/28/22	9/14/22 3:00am	3887835	Scheduled Service	FL Service	1	6 Yard		
		Thu 9/29/22	9/28/22 9:56am	4100056	On Call	FL Extra Pick Up	1	6 Yard	2223	
1153		Wed 10/5/22	9/11/22 3:00am	3930139	Scheduled Service	FL Service	1	6 Yard		
1153		Wed 10/12/22	9/28/22 3:00am	3924253	Scheduled Service	FL Service	1	6 Yard		
1153		Wed 10/19/22	9/4/22 3:00am	3986689	Scheduled Service	FL Service	1	6 Yard		
1153		Wed 10/26/22	9/11/22 3:00am	4016947	Scheduled Service	FL Service	1	6 Yard		
1161	this is work order notes on delivery, route 11-100 order notes on the work order	Tue 11/1/22	11/2/22 8:58am	4261990 *	Add Service	FL Delivery	2	8 Yard		
1153		Wed 11/2/22	9/18/22 3:00am	4049214 *	Scheduled Service	FL Service	1	6 Yard		
1153		Wed 11/9/22	9/25/22 3:00am	4081484	Scheduled Service	FL Service	1	6 Yard		
1153		Wed 11/16/22	10/2/22 3:00am	4113723	Scheduled Service	FL Service	1	6 Yard		
		Tue 11/22/22	11/22/22 4:26pm	4357229	On Call	FL Extra Pick Up	1	6 Yard		
1161	this is my order note for this oncall i am entering	Wed 11/23/22	11/22/22 4:00pm	4261991 *	On Call	FL Extra Pick Up	1	8 Yard		1
1153		Wed 11/23/22	10/6/22 3:00am	4146045	Scheduled Service	FL Service	1	6 Yard		
		Fri 11/25/22	11/23/22 4:29pm	4357230	On Call	FL Extra Pick Up	1	6 Yard		
1153		Wed 11/30/22	10/14/22 3:00am	4178006	Scheduled Service	FL Service	1	6 Yard		1
1153		Wed 12/7/22	10/23/22 3:00am	4212075	Scheduled Service	FL Service	1	6 Yard		
1153		Wed 12/14/22	10/30/22 3:00am	4242521	Scheduled Service	FL Service	1	6 Yard		
1153		Wed 12/21/22	11/6/22 3:00am	4274884	Scheduled Service	FL Service	1	6 Yard		1
1153		Wed 12/28/22	11/13/22 3:00am	4307130	Scheduled Service	FL Service	1	6 Yard		
1153		Wed 1/4/23	11/20/22 3:00am	4339844	Scheduled Service	FL Service	1	6 Yard		
1153		Wed 1/11/23	11/27/22 3:00am	4371845	Scheduled Service	FL Service	1	6 Yard		
1153		Wed 1/18/23	12/4/22 3:00am	4404303	Scheduled Service	FL Service	1	6 Yard		
1153		Wed 1/25/23	12/11/22 3:00am	4436588	Scheduled Service	FL Service	1	6 Yard		
1153		Wed 2/1/23	12/18/22 3:00am	4468905	Scheduled Service	FL Service	1	6 Yard		

Pathway: Operations > Dispatch

### Operations (Dispatch) - Route Labor Summary Edit Hours Fields (14272)[Enhancement]

An update was made to the Route Labor Summary tool available in Dispatch ( 'Crews' grid view) to allow editing of the Scheduled Hours and Actual Hours fields.

ROUTE #	CREW MEMBERS	LABOR SUMMARY	MATERIALS	TRUCK	DRIVER	PRE TRIP	POST TRIP	SCHEDULED	SERVICED	PENDING	DO NOT SERVICE	EXCEPTIONS
02-301	None	None	0					1	0	1 (100%)	0	0
02-300	Chuck Daniels (V - Sev (Not Available)) Crystal Smith - Customer Service Rep (Inactive)	1 2 2 1	0					2	0	2 (100%)	0	0
02-302	None	None	0					1	0	1 (100%)	0	0
02-303	None	None	0					3	0	3 (100%)	0	0
02-801	None	None	0					1	0	1 (100%)	0	0
02-802	None	None	0					29	0	22 (75%)	7 (25%)	0
02-803	None	None	0					38	0	33 (87%)	5 (13%)	0
02-804	None	None	0					81	0	38 (47%)	3 (7%)	0
02-805	None	None	0					26	0	18 (69%)	16 (62%)	0
02-808	None	None	0					1	0	1 (100%)	0	0
02-PA557THRU	None	None	0					2	0	2 (100%)	0	0
04-102	None	None	0					62	0	62 (100%)	0	0
04-103	None	None	0					53	0	53 (100%)	0	0
04-104	None	None	0					62	0	62 (100%)	0	0
04-151	None	None	0					30	0	30 (100%)	0	0
11-100	None	None	0					2	0	2 (100%)	0	0
11-101	None	None	0					42	0	38 (90%)	8 (17%)	0

Pathway: Operations > Dispatch

### Operations (Dispatch) - Added Option To Include Ticket Image With Invoice (14266)[Enhancement]

An 'Include Ticket Image With Invoice' checkbox has been added to both the Add and Edit Disposal/Ship Record screens. Select the check box and the image will be included on the invoice. This applies to single invoices only and may not be supported with all invoice formats.

Supported File Formats: JPG, PNG and PDF

**EDIT DISPOSAL/SHIP RECORD**

START DATE: 10/23/22 Sun | START TIME: 12:10 AM | END DATE: 10/23/22 Sun | END TIME: 1:00 AM | DESTINATION/ ORIGIN: Ajax- Quarry | TANK: [ ]

TRANSPORT METHOD: Truck | VEHICLE ID: Truck1 | EXTERNAL TICKET #: 1234MPS

MATERIAL	WEIGHT IN	WEIGHT OUT	QTY	UOM	MIN QTY	DISPOSAL RATE	FEE1	FEE2	TOTAL COST
Concrete			0	Ton	0	10.0000 Ton	0.00	0.00	0.00

NOTES: [ ]

Ticket Image: [ ]

Include Ticket Image With Invoice

Pathway: *Operations > Dispatch*

### Operations - Service Record Updated to Support Manifest Consolidation Transfers (14523) [Enhancement]

The Labels tab in the Service Record has been updated to support multiple batch consolidation transfers. Batch 1, Batch 2 and Batch 3 columns were added to record up to three batch transfers. The Batch ID of the Manifest Consolidation batch displays when a transfer exists. Hover over the ID to view batch details.

**EDIT SERVICE RECORD**

Example Account: 1234 Washington Ave Ste 100, San Jose 92029

WORK ORDER: 1707929 | QTY: 1 | SERVICE CODE: Regulated Medical Waste Service | WORK TYPE: RMWSVC | ORDER TYPE: Scheduled Service | MATERIAL: RMW

ORDER NOTES: [ ]

CREATED BY: Jessica Johnson on 8/31/22 3:00 am

ORDER REASON: [ ] | PO NUMBER: [ ] | EXTERNAL ID: [ ]

SCHEDULED DATE: 11/29/22 Tuesday | ROUTE: CA-503 | SEQUENCE: 0 | DESTINATION / ORIGIN: [ ]

SITE NOTE: [ ] | SVC NOTE: site already has containers. this is a change of address

WORK STATUS: Service Completed | EXCEPTION REASON: [ ] | POSTING STATUS: Billed - Invoice # 1244957 Nov 30, 2022

[Update History](#) John Doe on 11/29/22 4:48 pm | Robert Smith on 11/30/22 9:55 am

Completion Data | Charges <sup>9</sup> | Attachments | **Labels (3)** | Photos | Timeline / Map

HIDE SCANNED LABELS

Search Label: [ ] APPROVE

LABEL	CHARGE CODE	EQUIPMENT TYPE	TARE WEIGHT	GROSS WEIGHT	NET WEIGHT	MANUAL WEIGHT	SCAN LOCATION	CONSOLIDATION		
								BATCH 1	BATCH 2	BATCH 3
<input type="checkbox"/> 1707929-77609...	3.2gal Non-Haz...	3.2gal Non Haz...	4.2	8.1	3.9		Example Locati...	3034		
<input type="checkbox"/> 1707929-77609...	3.2gal Non-Haz...	3.2gal Non Haz...	4.2	8.3	4.1		Example Locati...	3034		
<input type="checkbox"/> 1707929-77609...	3.2gal Non-Haz...	3.2gal Non Haz...	4.2	10.2	6		Example Locati...	3034		

Status: Post | Date: 2022-12-01 | From: [ ] | To: [ ]

### Operations (Service Record) - Update to Name Display in Labor Tab (14279)[Enhancement]

The employee name field in the Labor tab has been updated to include the employee's title following their name.

**EDIT SERVICE RECORD**
? X

<b>Example Account</b> 123 Navusoft Pkwy POINCIANA, FL 34759 PHONE (555) 555-1234	<b>WORK ORDER</b> 4028334	<b>QTY</b> 1	<b>SERVICE CODE</b> 6 Yard Recycle Service	<b>EQUIPMENT</b> 6Y	<b>WORK TYPE</b> FL_SERVICE	<b>ORDER TYPE</b> Scheduled Service	<b>MATERIAL</b> MX_REC
--	------------------------------	-----------------	---	------------------------	--------------------------------	--	---------------------------

<b>SCHED. DATE</b> 10/27/22 Thursday	<b>ROUTE</b> 04-103	<b>SEQUENCE</b> 0	<b>ACTUAL QTY</b> 0.00
---	------------------------	----------------------	---------------------------

<b>WORK STATUS</b> Scheduled	<b>POSTING STATUS</b> Pending
---------------------------------	----------------------------------

<b>PO NUMBER</b> <input type="text"/>	<b>EXTERNAL ID</b> <input type="text"/>
--	--

**ORDER NOTES**

**CREATED BY**  
 Navusoft on 9/12/22 3:00 am  
**REASON**

<a href="#">Completion Data</a>	<a href="#">Charges</a>	<a href="#">Lab Tests</a>	<a href="#">Attachments</a>	<a href="#">Labels</a>	<a href="#">Labor</a> <span style="color: red; font-weight: bold;">1</span>	<a href="#">Photos</a>
---------------------------------	-------------------------	---------------------------	-----------------------------	------------------------	---	------------------------

EMPLOYEE	SCHEDULED HOURS	BOOKED HOURS	NOTES
John Doe - Route Manager	8		<span style="color: red; font-weight: bold;">-</span>

Pathway: Operations > Dispatch

### Operations (Manifest Consolidation) - Updates to Manifest Consolidation Batch Screen (14704) [Enhancement]

The following improvements have been applied to the Manifest Consolidation Batch screen:

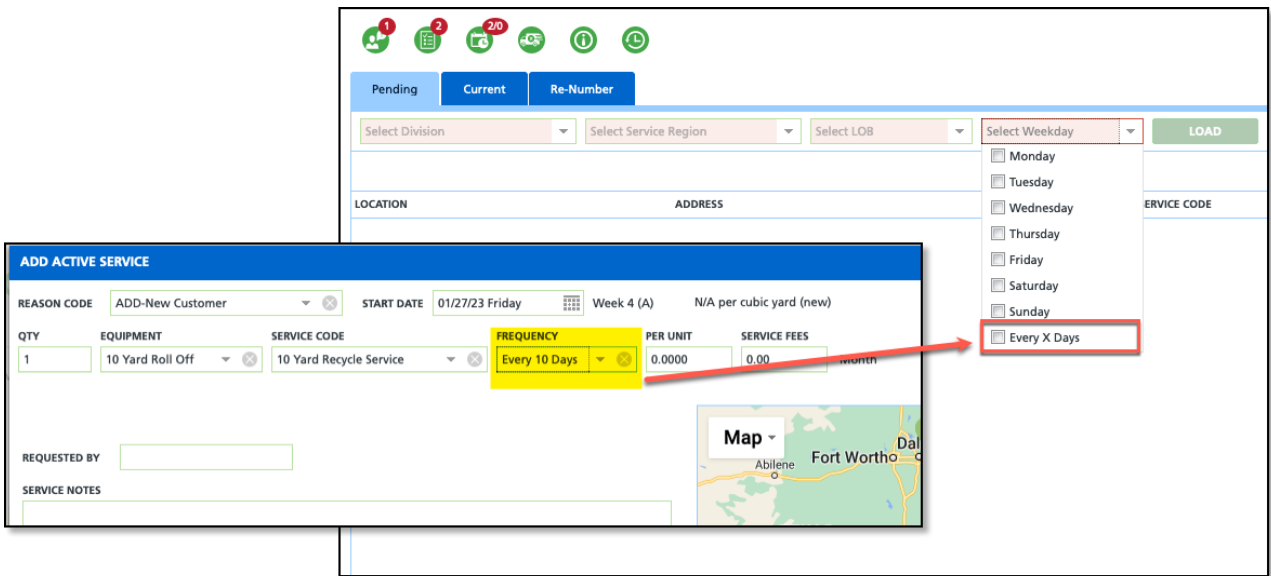
1. Charge Code column added
2. Material column added
3. Pick Up Date column added
4. Scanned time formatting has been updated and the Scanned By name displays below

MANIFEST CONSOLIDATION BATCH 1000 - 10/28/2022 LABELS									
SITE	EQUIPMENT	CHARGE CODE	MATERIAL TYPE	WO #	LABEL	GROSS WEIGHT	NET WEIGHT	SCANNED TIME	PICK UP DATE
2021-THE JINGLE 5K RUN	42 Gallon	42 Gallon Chemo		<a href="#">4132289</a>	4132289-1098743-...	134.8	134.8	10/5/22 8:57 pm By: Lori Sheldt	
2021-THE JINGLE 5K RUN	42 Gallon	42 Gallon Chemo		<a href="#">4132289</a>	4132289-1098743-...	134.8	134.8	10/5/22 8:57 pm By: Lori Sheldt	

Pathway: Operations > Manifest Processing > Manifest Consolidation: Manifest Consolidation Batch

### Operations (Route Management) - Support for 'X' Days Released (14638)

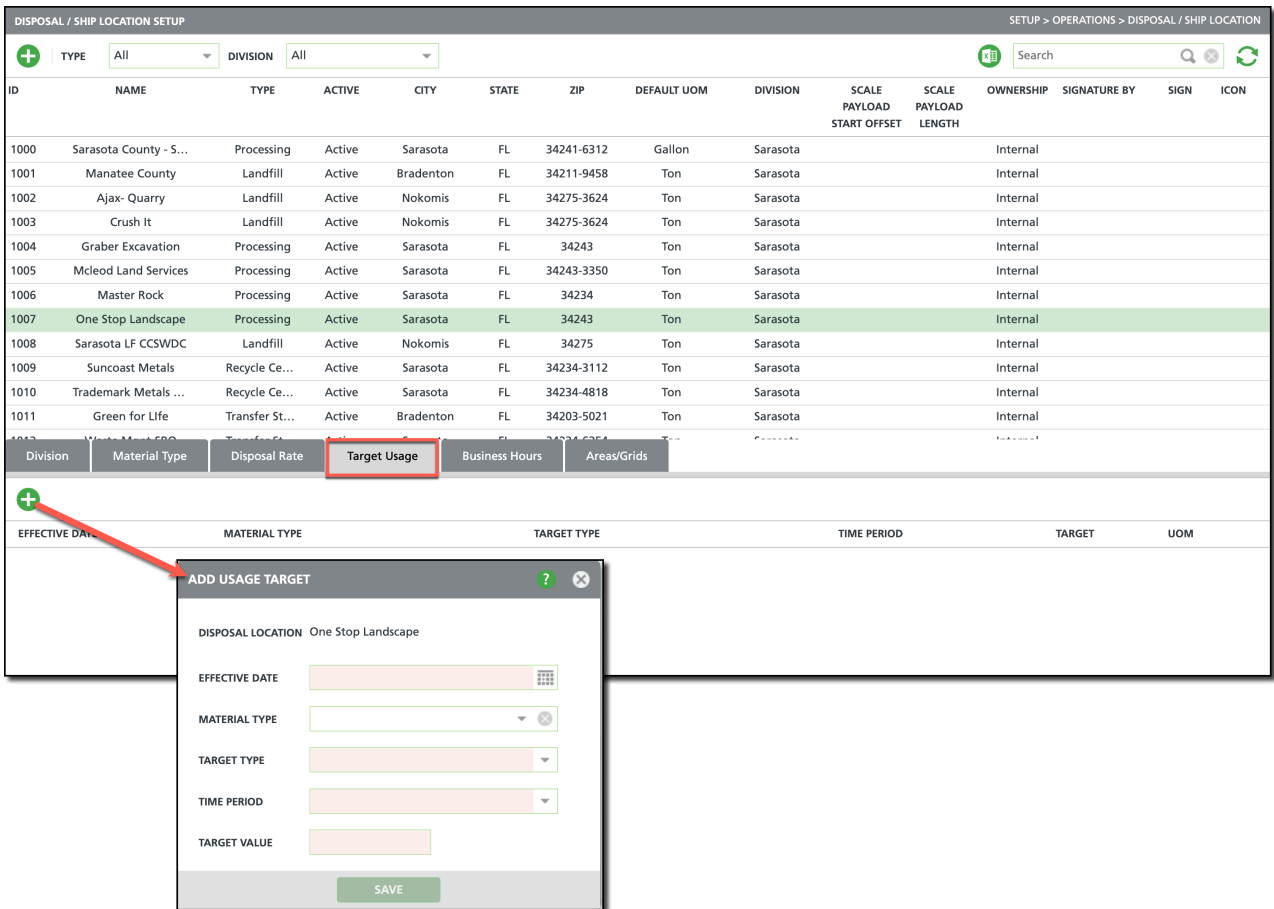
The Route Management screens have been improved to support servicing schedules that follow a service timeline of every 'X' days.



Pathway: Operations > Route Management > Pending & Current Tabs

### Operations - Disposal Location Target Usage (14349,14350)[Enhancement]

A new feature, 'Target Usage' has been added to the Disposal / Ship Location screen to create a utilization target for a disposal location that can then be tracked in the 'Disposal Location Usage' tool (Operations > Disposal Location Usage).



### Add a Usage Target:

Pathway: Set Up > Operations > Disposal / Ship Location

1. Select a Disposal Location.
2. Select the Target Usage tab.
3. Click the green '+' to open the 'Add Usage Target' tool.
4. Enter information for Effective Date, Material Type (optional), Target Type, Time Period, and Target Value.
5. Click Save to apply information to the Disposal Location.

## Disposal Location Usage - Targets And Usage History

After Target Usage has been established, use the *Disposal Location Usage* screen to track and monitor current and historical usage for a location.

The following displays for each disposal location:

- Activity to Date: Count and Total of Disposal Records entered for the location
- Pending Activity: Count of stops and estimated volume for future routes or work orders with a default destination assigned
- Target: Displays current target and utilization amount or percentage for the location
- Unassigned Loads: Future stops or routes that do not have a default destination assigned.

DISPOSAL LOCATION USAGE				OPERATIONS > DISPOSAL LOCATION USAGE
Targets		Usage History		
DIVISION				
Augusta, Clearwater, NWA, Oldsmar, Orlando, Sarasota, Topeka, Training Division				
DISPOSAL LOCATION ↑		ACTIVITY TO DATE	PENDING ACTIVITY	TARGET
A Waste & Recycling	12/01/2022 - 12/28/2022	1 load 3,000 tons \$0.00	12/28/2022 - 12/31/2022 No Pending Activity	Monthly target - 1,000 tons Next target date: Sat Dec 31, 2022  300% with 3 days remaining
Ajax- Quarry	12/01/2022 - 12/28/2022	No Activity Found	12/28/2022 - 12/31/2022 No Pending Activity	No Target Set Click to add target
Blue Monkey Disposal and Recy...	12/01/2022 - 12/28/2022	2 loads 255.2 tons \$13,990.00	12/28/2022 - 12/31/2022 No Pending Activity	No Target Set Click to add target
Charlotte Cty-Landfill	12/01/2022 - 12/28/2022	1 load 11 tons \$0.00	12/28/2022 - 12/31/2022 No Pending Activity	No Target Set Click to add target
Coast Landfill	12/01/2022 - 12/28/2022	15 loads 4,185.3 cubicyards \$36,412.11	12/28/2022 - 12/31/2022 2 routes 68 stops 70 containers - est. volume 250	No Target Set Click to add target
Crush It	12/01/2022 - 12/28/2022	No Activity Found	12/28/2022 - 12/31/2022 No Pending Activity	No Target Set Click to add target
Dakin Natural Soils	12/01/2022 - 12/28/2022	No Activity Found	12/28/2022 - 12/31/2022 No Pending Activity	No Target Set Click to add target
UNASSIGNED LOADS ↑				
Route 02-601 - 12/29/22		30 stops - Est. Volume: 500		
Route 02-602 - 12/29/22		31 stops - Est. Volume: 0		
Route 02-604 - 12/29/22		21 stops - Est. Volume: 500		
Route 02-608 - 12/29/22		22 stops - Est. Volume: 250		
Route 02-PASSTHRU - 12/29/22		2 stops - Est. Volume: 0		
Route 04-102 - 12/29/22		65 stops - Est. Volume: 334		
Route 04-103 - 12/29/22		58 stops - Est. Volume: 416		
Route 04-104 - 12/29/22		70 stops - Est. Volume: 430		
Route 04-151 - 12/29/22		33 stops - Est. Volume: 196		
Route 11-101 - 12/29/22		46 stops - Est. Volume: 280		
Route 11-10901 - 12/29/22		2 stops - Est. Volume: 16		
Route 11-202 - 12/29/22		664 stops - Est. Volume: 351		
Route 11-203 - 12/29/22				

Pathway: Operations > Disposal Location Usage

## Operations (Route Management) - Service Frequency Changes Not Showing (14636, 14378)

An issue has been resolved that prevented correctly updating schedules to match a site's service frequency after the frequency was updated.

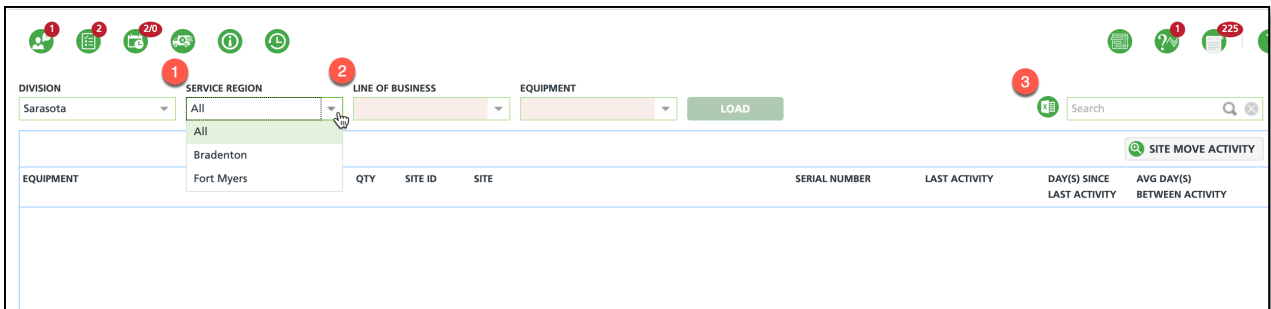
This affected the Calendar and Route Management tools.

Pathway: Accounts > Account: Calendar; Operations > Route Management

## Operations (Site Inventory) - Screen Updates and Filter Added (14714)[Enhancement]

The Site Inventory screen has been updated with the following changes:

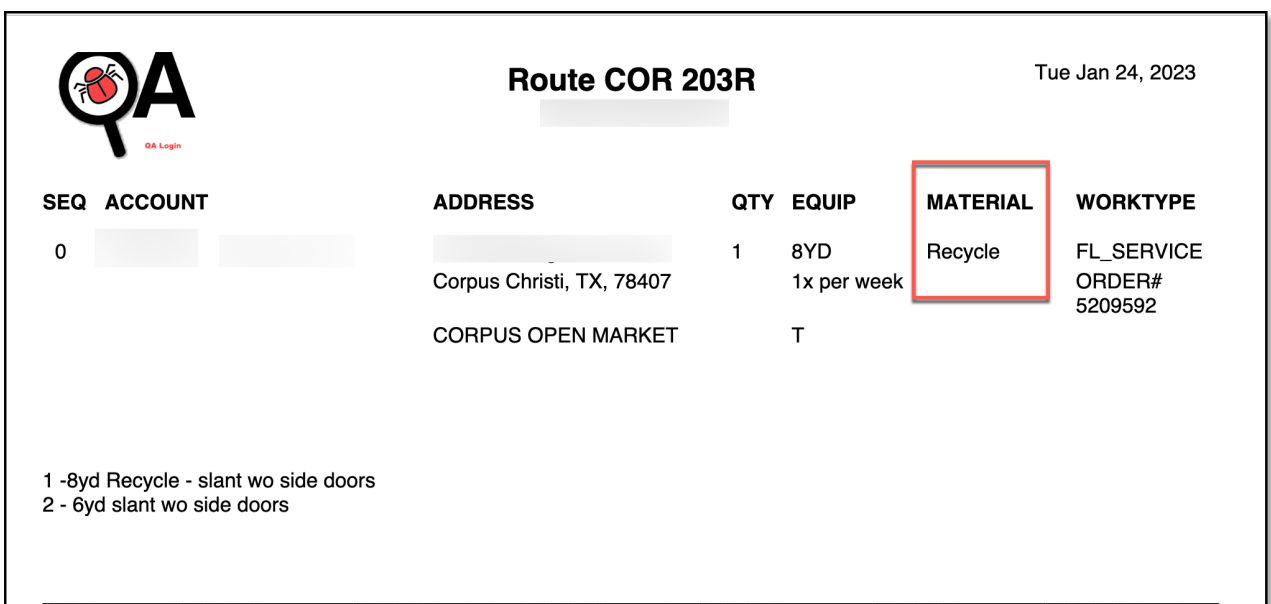
1. A new 'Service Region' filter has been added and is limited to the selected Division
2. The LOB filter has been renamed to "Line of Business"
3. The Export button has been moved to the left of Search



Pathway: *Operations > Inventory Management > Site Inventory*

## Operations (Dispatch) - Material Field Added to Route Report (14711)[Enhancement]

A new 'Materials' column has been added to the Route Report (Format 2) to further assist drivers in servicing site locations.



Pathway: *Operations > Dispatch: Print Route*

## Operations (Dispatch) - Disposal Departure Date and Time Updated (14252)

Previously, the Disposal Departure date and time in the Completion Data tab was displaying incorrectly. This has been resolved.

EDIT SERVICE RECORD
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<b>JOHN SMITH</b> 7777 EXAMPLE RD PALM HARBOR, FL 34683 PHONE (777) 777-7777 ACCESS Access Info! SITE NOTE location note	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <th>WORK ORDER</th> <th>QTY</th> <th>SERVICE CODE</th> <th>EQUIPMENT</th> <th>WORK TYPE</th> <th>ORDER TYPE</th> <th>MATERIAL</th> </tr> <tr> <td>3912817</td> <td>1</td> <td>10 Yard Trash Service</td> <td>10YRO</td> <td>RO_DUMPRET</td> <td>Scheduled Service</td> <td>TRASH</td> </tr> </table>	WORK ORDER	QTY	SERVICE CODE	EQUIPMENT	WORK TYPE	ORDER TYPE	MATERIAL	3912817	1	10 Yard Trash Service	10YRO	RO_DUMPRET	Scheduled Service	TRASH	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <th>SCHED. DATE</th> <th>ROUTE</th> <th>SEQUENCE</th> <th>ACTUAL QTY</th> </tr> <tr> <td>10/03/22 Monday</td> <td>11-301</td> <td>0</td> <td>1.00</td> </tr> </table> <p>WORK STATUS: Service Completed</p> <p>POSTING STATUS: Lori Sheldt on 10/25/22 8:27 am Billed - Invoice # 923238 Oct 25, 2022</p> <p>PO NUMBER: <input type="text"/></p> <p>EXTERNAL ID: <input type="text"/></p> <p>ORDER NOTES: <input style="width: 100%;" type="text"/></p>	SCHED. DATE	ROUTE	SEQUENCE	ACTUAL QTY	10/03/22 Monday	11-301	0	1.00
WORK ORDER	QTY	SERVICE CODE	EQUIPMENT	WORK TYPE	ORDER TYPE	MATERIAL																		
3912817	1	10 Yard Trash Service	10YRO	RO_DUMPRET	Scheduled Service	TRASH																		
SCHED. DATE	ROUTE	SEQUENCE	ACTUAL QTY																					
10/03/22 Monday	11-301	0	1.00																					

CREATED BY: Dave Pike on 8/19/22 3:00 am

REASON:

Completion Data
Charges <sup>3</sup>
Disposal/ Ship <sup>1</sup>
Lab Tests
Attachments
Labels
Labor
Photos

START	Click to Set	Stop was never set to IN PROGRESS
END	10/25/22 8:27 am	Lori Sheldt - Acct Asst setting status to SERVICE COMPLETED
DISPOSAL ARRIVAL	10/24/22 7:00 am	to Coast Landfill
DISPOSAL DEPARTURE	10/24/22 8:15 am	from Coast Landfill

No Driver Signature / No Customer Signature

COMPLETION/EXCEPTION NOTES:

Select Print Format 
SAVE

Pathway: Operations > Dispatch

## Reports

### Reports (Standard Reports) - Permission Update to View/Use Disposal Details Report (14565)

A permission related issue was preventing users from viewing the Disposal Details Report. This has been resolved and users must be assigned permission 298 'Standard \ Operations Reports' to access the report.

PERMISSION SETUP			
MODULE	<input type="text"/>		298
PERMISSION ID	NAME	DESCRIPTION	MODULE
298	Standard \ Operations Reports		Reports

Pathway: Reports > Standard Reports > Operations > Disposal Detail; Setup > System > Permission; Role

### Reports (Revenue Analysis) - New Report Available (14652)[Enhancement]

A new Revenue Analysis report is available in Reports > Analysis. After a report **Type** has been selected, use the filtering options to further limit what is returned. Load must be selected each time a new selection is made to Type or any of the filter drop downs.

REVENUE ANALYSIS														
TYPE	Billed by Account Class													
YEAR	DIVISION			SERVICE REGION										
2023	:ka, Training Division			All										LOAD
	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	TOTAL	
Commercial	3,672.87	0.00	0.00	1,761.44	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	5,434.31	
Government	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
Residential	453,404.91	0.00	0.00	452,809.62	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	906,214.53	
PERM	1,260.00	184.02	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1,444.02	
TEMP	57.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	57.00	
BROKER	3,400.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	3,400.00	
VENDOR	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
<b>Total</b>	<b>461,794.78</b>	<b>184.02</b>	<b>0.00</b>	<b>454,571.06</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>916,549.86</b>	

Pathway: Reports > Analysis > Revenue Analysis

## Setup

### Setup (Operations) - New Work Type Field (14540)[Enhancement]

A new setup option, 'Enable Driver to Set In Progress' has been added to the Work Type Setup editor. When enabled, a drive can start or set the work order status to In Progress from their NavuNav (Android) application (v1.0.3 or later).

- Enabled = Yes
- Not Enabled = No

**WORK TYPE SETUP**

LOB: All

ID	NAME	LOB	ACTION CATEGORY	INVENTORY MOVE TYPE	MANIFEST NOTIFICATION TEMPLATE
DUMPNOLY	Dump Only	Roll Off		None	
RETURNBOX	Return Box	Roll Off		None	
RO_DELIVER	RO Delivery	Roll Off	Delivery	Delivery	
RO_DUMPRET	RO Dump/Return				
RO_DUMPRTMV	RO Dump/Remove				
RO_RELOCAT	RO Relocate				
RO_REMOVE	RO Removal				
RO_REPAIR	RO/Packer Repair				
RO_Return	Return Yard Box Only				
RO_SWAP	RO Swap				

**UPDATE WORK TYPE**

Work Type: Add/Remove Default Charge Code

ID: RO\_DELIVER

NAME: RO Delivery

LOB: Roll Off

INVENTORY MOVE TYPE: Delivery

ACTION CATEGORY: Delivery

ORDER BASELINE SECONDS:

DEFAULT SECONDS PER UNIT: 0

MANIFEST NOTIFICATION TEMPLATE:

CREATE ONE SERVICE RECORD PER QUANTITY: Yes

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 ACCOUNT PORTAL ENTRY: No

**ENABLE DRIVER TO SET IN PROGRESS: No**

Saved.

Pathway: Setup > Operations > Work Type

### Set Up - 'WO New Status' Column Added to Reason Code Setup - (14367)Enhancement]

A 'WO New Status' column has been added to the Reason Code Setup screen for NavuNav processing of stops. When a Reason Code is selected by the driver for a Service Exception, it will move the stop to the Exceptions column in Dispatch and update the 'Work Status' and 'Exception Reason' fields in the Work Order. This setup is part of Split Order processing and does not affect the status in core.

**Example Scenario:** A driver serviced the location but they were not able to make it to the disposal location before it closed. In this scenario, the driver would select the reason code that applies (RO-Not Dumped / Service Completed) to indicate the service is complete but the Work Order is not.

**REASON CODE SETUP**

TYPE	REASON CODE	NAME	GL ACCOUNT	WO NEW STATUS
Service Exception	BLCART	Blocked Cart		Not Serviced
Service Exception	FLBLOCKED	FL-Bin Blocked		Not Serviced
Service Exception	FLRECONT	FL-Recycling Contaminated		Service Completed
Service Exception	FFBLOCKED	FF-Blocked		Not Serviced
Service Exception	RENOCADUT	No Cart Out		Not Serviced
Service Exception	ReNoAcces	Not Accessible		Not Serviced
Service Exception	RERECONT	Recycling Contaminated		Not Serviced
Service Exception	RESOVERIL	Overloaded Cart		Not Serviced
Service Exception	ROBLOCKED	RO-Blocked		Not Serviced
Service Exception	RO_NOTDUMP	RO-Not Dumped		Service Completed

Pathway: Setup > Systems > Reason Code

### Setup (Accounting) - Change Days For Past Due Notifications (14486)

Previously, entries made to the Days field for *Past Due Notifications Templates* 1 through 4 were not saving. This has been fixed.

**UPDATE BILL GROUP**

Settings Notifications

NOTIFICATION TEMPLATE (INVOICE AS LINK) Orion Waste Solutions Invoice #@@in

NOTIFICATION TEMPLATE (INVOICE AS ATTACHMENT) Orion Waste Solutions Invoice #@@in

INVOICE DUE REMINDER TEMPLATE REMINDER-Your invoice payment is d DAYS 4

UNREAD INVOICE REMINDER TEMPLATE Your recent invoice #@@invoiceld; ha DAYS 2

STATEMENT NOTIFICATION TEMPLATE Orion Waste Solutions Statement

PAST DUE EMAIL FROM MINIMUM PAST DUE AMOUNT 5

PAST DUE NOTICE 1 NOTIFICATION TEMPLATE \*Please Pay Your Current Bill\* DAYS 15

PAST DUE NOTICE 2 NOTIFICATION TEMPLATE \*\*Your Account May Be Past Due\*\* DAYS 20

PAST DUE NOTICE 3 NOTIFICATION TEMPLATE \*\*\*Tour Account is 2 months past due DAYS 30

PAST DUE NOTICE 4 NOTIFICATION TEMPLATE \*\*\*\*Your Account is Seriously Past Du DAYS 45

PAST DUE NOTIFICATION MESSAGE  
past due message - set days to 4 and 2 from 5 and 7 so i can get faster

Saved.

Pathway: Set Up > Accounting > Bill Group > Update Bill Group

### Setup (Accounting) - GL Account Setup Type Column (14649)

The 'Type' column has been removed from the GL Account Setup screen.

Pathway: Setup > Accounting > GL Account

### Setup (Services) - Service Code Map, Charge Codes (14432)

Previously, not all Charge Code options were displayed in the Add/Update Service Code Map. Now all charge code options display when selected.

SERVICE CODE MAP SETUP

ID	SERVICECODE ID	EQUIPMENT TYPE	CHARGECODE ID	NOTE	DIVISION	COUNT	TYPE	RCODE	RCOBS	EMAIL
1000	2 Yard Recycle Service		COMREC 2Y 100W		1002	1	1.00	2C	81	
1001	2 Yard Recycle Service		COMREC 2Y 300W		1002	1	1.00	2C	83	
1002	2 Yard Recycle Service		RECYCLE 2Y 100W		1002	1	1.00	2B	290	
1003	2 Yard Recycle Service		RECYCLE 2Y 100W		1002	1	1.00	2Y	81	
1004	2 Yard Trash Service	Special Event Trip Charge	2Y BIN 100W		1002	1	1.00	2Y	100	
1005	2 Yard Trash Service		2Y BIN 200W		1002	1	1.00	2Y	290	
1006	2 Yard Trash Service		2Y BIN 300W		1002	1	1.00	2Y	26	
1007	4 Yard Recycle Service		COMREC 4Y 100W		1002	1	1.00	4C	81	
1008	4 Yard Recycle Service		COMREC 4Y 300W		1002	1	1.00	4C	82	
1009	4 Yard Recycle Service				1002	1	1.00	4Y	190	
1010	4 Yard Recycle Service				1002	1	1.00	4Y	81	
1011	4 Yard Recycle Service				1002	1	1.00	4Y	82	
1013	4 Yard Trash Service				1002	1	1.00	4Y	290	
1014	4 Yard Trash Service				1002	1	1.00	4Y	81	
1015	4 Yard Trash Service				1002	1	1.00	4Y	82	
1016	4 Yard Trash Service				1002	1	1.00	4Y	83	
1017	6 Yard Recycle Service				1002	1	1.00	6C	81	
1018	6 Yard Recycle Service				1002	1	1.00	6C	82	
1019	6 Yard Recycle Service				1002	1	1.00	6Y	10	
1020	6 Yard Recycle Service				1002	1	1.00	6Y	81	
1021	6 Yard Recycle Service				1002	1	1.00	6Y	82	
1022	6 Yard Recycle Service				1002	1	1.00	6Y	83	
1023	6 Yard Trash Service				1002	1	1.00	6Y	100	
1024	6 Yard Trash Service				1002	1	1.00	6Y	290	
1025	6 Yard Trash Service				1002	1	1.00	6Y	260	
1026	6 Yard Trash Service				1002	1	1.00	6Y	81	
1027	6 Yard Trash Service				1002	1	1.00	6Y	82	
1028	6 Yard Trash Service				1002	1	1.00	6Y	83	

UPDATE SERVICE CODE MAP

ID 1004

SERVICECODE ID 2 Yard Trash Service

CHARGECODE ID Special Event Trip Charge

NOTE 2Y BIN 100W

DIVISION 1002

RCODE 2Y

RCOBS

EMAIL

Special Event Trip Charge

Relocate

Rental Fee

Roll Off 30 Day Inactivity Fee

Roll Off Priority

Special Event 250g Holding Tank

Special Event Delivery Fee

Special Event Handicap Unit

Special Event Service

Special Event Standard Unit

Special Event Trailer

Special Event Trash Box Delivery

Special Event Trip Charge

Pathway: Set Up > Services > SoftPak Service Code Map > Update Service Code Map

### Setup (Services) - Unearned Revenue GL Account Field Updated in Update LOB Screen (14648) [Enhancement]

The 'Unearned Revenue GL Account' field in the Update Line of Business screen has been updated to include the option to clear the assigned GL Account from the field.

**UPDATE LINE OF BUSINESS** ? X

LOB ID: FEL\_REC

NAME:  ACTIVE:

**Settings** Mobile / Optimization / Online Order

SCREEN TYPE	<input type="text" value="1"/>	ENABLE USED OIL COLLECTION	<input type="text" value="No"/>
GL SEGMENT	<input type="text"/>	ENABLE PROACTIVE ROUTE STATUS DRIVER CHECK	<input type="text" value="No"/>
UNEARNED REVENUE GL ACCOUNT	<input type="text"/>	ENABLE MANIFEST PROCESSING	<input type="text" value="No"/>
WORK ORDER MINIMUM CHARGE CODE	<input type="text"/>	ENABLE MANIFEST GROUP WEIGHT ROUNDING	<input type="text" value="No"/>
OVER MAX WEIGHT CHARGE CODE	<input type="text"/>	ENABLE ACTIVE DISPATCH	<input type="text" value="No"/>
RENTAL CHARGE CODE	<input type="text"/>	ENABLE CHARGE CODE WASTE CODES	<input type="text" value="No"/>
LIMIT CHARGE CODE TO MATCHING EQUIPMENT	<input type="text" value="No"/>	ENABLE WORK TYPE DEFAULT CHARGE CODES	<input type="text" value="No"/>
LIMIT CHARGE CODE TO MATCHING MATERIAL	<input type="text" value="No"/>	ENABLE BIC REPORTING	<input type="text" value="No"/>
INVOICE SUMMARY DESCRIPTION	<input type="text"/>	ENABLE LABOR TRACKING	<input type="text" value="No"/>
PRODUCTIVITY UNIT NAME	<input type="text"/>		

**Profitability**

ROUTE CALCULATION:

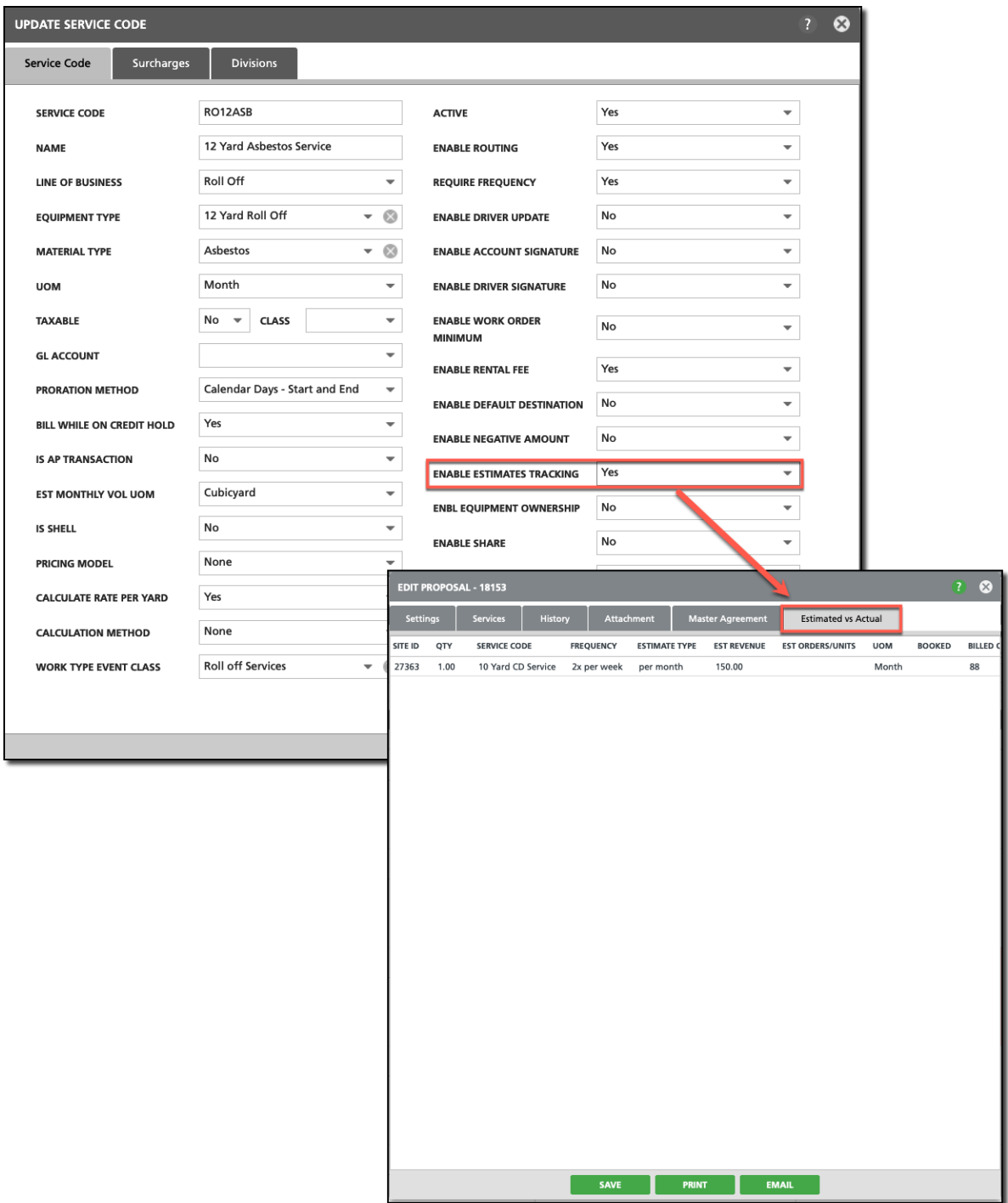
WORK ORDER CALCULATION:

Saved.

Pathway: Setup > Services > Line Of Business > Update Line Of Business

### Setup (Services) - Display Estimated vs. Actual Tab in Proposals (14247) [Enhancement]

An option to *Enable Estimates Tracking* has been added to Service Code setup. When the Enable Estimates Tracking field is set to 'Yes', an *Estimated vs. Actual* tab displays for Proposals.



### Setup (Document Format) - Proposal Form Type Setup Active Column (14623)[Enhancement]

A new Active column has been added to the Proposal Form Type Setup screen to indicate if a form is active or inactive. By default, this field is set to 'Active'. To change, double click within the row to open the 'Update Proposal Form Type' editor and select from the 'Yes/No' options in the Active drop down field.

#	NAME	FORM TYPE	REASON CODE	IS BUREAU TYPE	IS NEW	PRE-APPROVAL	APPROVAL	CHECK LIST TYPE	ACTIVE
1	New Service	Proposal	ADD Ser. New Service	No	No	Not Required	Required		Active
2	New Service	Service Contract	ADD Ser. New Service	No	No	Not Required	Required	Reverse required prior to Agreement	Active
3	New Service	Service Change Form	ADD Ser. New Service	No	No	Not Required	Required	Reverse required prior to Agreement	Active
4	Chg Ser Price Decrease	Proposal	Chg. Price Decrease	No	No	Not Required	Required		Active
5	Chg Ser Price Decrease	Service Contract	Chg. Price Decrease	No	No	Not Required	Required		Active
6	Chg Ser Price Decrease	Service Change Form	Chg. Price Decrease	No	No	Not Required	Required		Active
7	Chg Ser Price Increase	Proposal	Chg. Price Increase	No	No	Not Required	Required		Active
8	Chg Ser Price Increase	Service Contract	Chg. Price Increase	No	No	Not Required	Required		Active
9	Chg Ser Price Increase	Service Change Form	Chg. Price Increase	No	No	Not Required	Required		Active
10	Chg Ser Service Decrease	Proposal	Chg. Service Decrease	No	No	Not Required	Required		Active
11	Chg Ser Service Decrease	Service Contract	Chg. Service Decrease	No	No	Not Required	Required		Active
12	Chg Ser Service Decrease	Service Change Form	Chg. Service Decrease	No	No	Not Required	Required		Active
13	Chg Ser Service Increase	Proposal	Chg. Service Increase	No	No	Not Required	Required		Active
14	Chg Ser Service Increase	Service Contract	Chg. Service Increase	No	No	Not Required	Required		Active
15	Chg Ser Service Increase	Service Change Form	Chg. Service Increase	No	No	Not Required	Required		Active
16	Chg Ser Contract Renewal	Proposal	Chg. Contract Renewal	No	No	Not Required	Required		Active
17	Chg Ser Contract Renewal	Service Contract	Chg. Contract Renewal	No	No	Not Required	Required		Active
18	Chg Ser Contract Renewal	Service Change Form	Chg. Contract Renewal	No	No	Not Required	Required		Active
19	ADD Change to L200 Equipment	Proposal	ADD Change to L200 Eq.	No	No	Not Required	Reverse required prior to Agreement		Inactive
20	New Business Acquisition	Proposal	New Business Acquisition	No	No	Not Required	Reverse required prior to Agreement		Active
21	New Business From Competitor	Proposal	New Business From Com.	No	No	Not Required	Reverse required prior to Agreement		Active
22	New Business New Owner	Proposal	New Business New Owner	No	No	Not Required	Reverse required prior to Agreement		Active
23	New Business Temp	Proposal	New Business Temp	No	No	Not Required	Reverse required prior to Agreement		Active
24	New Customer	Proposal	New Business	No	No	Not Required	Reverse required prior to Agreement		Active
25	Renewal Not Dtd Cust	Proposal	Renewal Not Dtd Cust	No	No	Not Required	Reverse required prior to Agreement		Active
26	Chg Contract Renewal	Proposal	Chg Contract Renewal	No	No	Not Required	Required		Active
27	Chg Price Book	Proposal	Chg Price Book	No	No	Not Required	Required		Active
28	Chg Price Month	Proposal	Chg Price Month	No	No	Not Required	Required		Active

Pathway: Setup > Document Format > Type

## Setup (Services) - Surcharges With Multiple Rates Double Charging (14425)

An issue has been resolved that was causing the double application of a surcharge when the surcharge included multiple rates with different effective dates.

Pathway: Setup > Services > Surcharges

## Set Up (System) - Division Set Up Time Zone Required (14713)[Enhancement]

A change has been made to Division Setup tool to require a Time Zone be assigned when adding a new Division.



Navusoft recommends you review the timezone assigned in Division Setup for all Divisions.

+
DIVISION
CORPUS

Details
Credit Card / ACH Processing
Cost / Target Pricing

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**DIVISION ID** 1002

**NAME** CORPUS

**Legal Address**

**NAME** QA WASTE SERVICES

**ADDRESS LINE 1** PO BOX 260119

**ADDRESS LINE 2**

**CITY** Corpus Christi

**STATE** TX **POSTAL CODE** 78426

**MAIN PHONE** (361) 289-5588

**TOLL FREE PHONE** (800) 555-6513

**FAX** (999) 999-9999

**EMAIL**

**TIME ZONE** Central Standard Time

**SERVICE NOTIFICATION FROM EMAIL** svc@navusoft.com

**DIVISION GROUP**

**EPA ID** FRONTIER K2, LLC FEIN 81-5137248

**GL SEGMENT** L300

**EXTERNAL DB ID** COR

**NOTE**

**LOGO URL**

**Bill Remit Address**

**NAME** QA WASTE SERVICES - CORPUS

**ADDRESS LINE 1** PO BOX 260119

**ADDRESS LINE 2**

**CITY** Corpus Christi

**STATE** TX **POSTAL CODE** 78426

**AUTO PROCESS SERVICE CHANGES** Active Service

**ENABLE INTEGRATION** None

**LOCKBOX IMPORT FORMAT** Format3

**LOCKBOX NON-MATCHING ACCOUNT** 31847

**ACCOUNT PORTAL URL** navuqa-customerportal.navusoft.net

**ACCOUNT PORTAL PAST DUE TEXT**

**MAILCHIMP API KEY**

**MAILCHIMP LIST ID**

**SMS TASK DEFAULT USER**

**RO DISPOSAL REV %** 0.00

**ACCOUNT CUSTOM SETTINGS CLASS**

**SITE CUSTOM SETTINGS CLASS**

Pathway: Set Up > System > Division

## Setup (System) - New Keypaths Added to Vendor Notification Templates (14034)[Enhancement]

The following Keypaths have been added to the Vendor Work Order Notification template and Vendor Service Change Notification template:

1. Workorder.ponumber

2. login.usr.email
3. login.usr.name
4. login.usr.title
5. site.name2

**ADD NOTIFICATION TEMPLATE**

TYPE: Vendor Service Change Notification | NAME: | ACTIVE: Yes

RESPON: Ema

CONTENT TYPE: text/html

**KEY PATHS**

- change.effectivedate
- change.id
- change.type
- login.usr.email
- login.usr.name
- login.usr.title
- new.equipmenttype.name
- new.frequency
- new.materialtype.name
- new.quantity
- new.servicedescription
- new.vendortrate
- previous.equipmenttype.name
- previous.frequency
- previous.materialtype.name
- previous.quantity

SAVE

Pathway: Setup > System > Notification Template

### Setup (System)- Portal Invitation Notification Template (14591) [Enhancement]

A new 'division.paymentportalurl' keypath was added to the Account Portal Notification template.

ID	NAME	DEFAULT SUBJECT	TYPE	CONTENT TYPE	CREATED BY	SURVEY TYPE	RESPONSE REQUEST TYPE	ACTIVE	PREVIEW EMAIL	PREVIEW TEXT
1	Proposal	Proposal/Please Sign Orion Waste Service Agreement	Proposal	text/html	Lori Shields			Yes	Editable	
2	Proposal/Service Agreement	Orion Waste Solutions Proposal / Service Agreement	Proposal / Service Agreement	text/html	Lori Shields			Yes	Editable	
50	Portal Invite	Portal Invitation	Account Portal Notification	text/html	Lori Shields			Yes	Editable	
51	Other	Other / Thank you from Orion Waste Solutions	Other	text/html	Lori Shields			Yes	Editable	
52	Proposal / Service Agreement	Proposal / Service Agreement Follow Up	Proposal / Service Agreement	text/html	Lori Shields			Yes	Editable	
53	Contact Form	Contact Form - Orion Waste Solutions Introduction	Contact Form	text/html	Lori Shields			Yes	Editable	
54	Invoice	Biocul Disposal of Services, LLC Invoice	Invoice	text/html	Lori Shields			Yes	Editable	
55	Statement	Orion Waste Solutions Statement	Account Statement	text/html	Lori Shields			Yes	Editable	
56	Portal Invite	Newsoft's Intro Letter	Account Portal Notification	text/html	Lori Shields			Yes	Editable	
57	Invoice	Invoice - New Software Introduction	Invoice	text/html	Lori Shields			Yes	Editable	
58	Invoice Link	Orion Waste Solutions Invoice ##@invoices@ - Link	Invoice	text/html	Lori Shields			Yes	Editable	
59	Invoice Attachment	Orion Waste Solutions Invoice ##@invoices@ - Enclosed	Invoice	text/html	Lori Shields			Yes	Editable	
60	**Current Acct	**Please Pay Your Current Bill**	Past Due Notification	text/html	Lori Shields			Yes	Editable	
61	**Past Due Account	**Your Account May Be Past Due**	Past Due Notification	text/html	Lori Shields			Yes	Editable	
62	****Suspend Account	****Your Account is Seriously Past Due!****	Past Due Notification	text/html	Lori Shields			Yes	Editable	
63	Payment Receipt	Payment Receipt from Orion Waste Solutions	Payment Receipt	text/html	Lori Shields			Yes	Editable	

**EDIT NOTIFICATION TEMPLATE**

TYPE: Account Portal Notification | NAME: Portal Invite | ACTIVE: Yes

RESPONSE REQUEST TYPE: Account Portal Notification

CONTENT TYPE: text/html

**KEY PATHS**

- division.addressline1
- division.addressline2
- division.city
- division.legalname
- division.logo
- division.malphone
- division.paymentportalurl
- division.state
- division.zip

SAVE

Pathway: Setup > System > Notification Template

## Setup (System) - Edit Reason Code ID (14513)

Logic has been updated to prevent the Reason Code ID field from being edited upon save.

EDIT REASON CODE
?
✕

**TYPE** Add ▾

**ID** IAC

**NAME** New Name

**EXTERNAL ID**

**SALES RESULTS REPORT TYPE** New ▾

**IS NEW OWNER** No ▾

**IS OLD OWNER** No ▾

**APPLY 1085 RULE** No ▾

**EXCLUDE FROM 1085** No ▾

**EXCLUDE FROM COMMISSION** No ▾

**IS TEMP** No ▾

**DISPLAY IN MOBILE** No ▾

**CAPTURE COMPETITOR** No ▾

Saved.

Pathway: Set Up > System > Reason Code

## Setup (System) - Logic Updated to Balance Write Off Reason Codes (14511)[Enhancement]

The type of Reason Codes available for selection for balance write offs has been limited to invoice adjustment reason codes with a GL account associated.

REASON CODE SETUP
SETUP - SYSTEM - REASON CODE

TYPE	REASON CODE	NAME	GL ACCOUNT	WO NEW STATUS
Add	ADDNEWCUS	ADD New Customer	Cash	
Add	IAC	New Name		
Add	ICD	ADD New Bus due to New Owner		
Add	IC	ADD New Bus from Competitor		
Add	IMP	ADD Conversion		
Add	IMR	ADD Immediate bill pay customer		
Add	IMB	ADD New Business - Green Field		
Add	IRR	ADD New Business - Recycling		
Add	ISA	ADD Seasonal Add Service		
Add	ISI	ADD Increase in Service		
Add	ITA	ADD Temporary Add Service		
Add	NSS	ADD New Service Site		
Add	SYSTEM_ADD	ADD Add Item by System		
Update	AIPI	CHG Automated Price Increase		
Update	CHG_CORN	CHG Change Correction		
Update	CHG_PD	CHG Price Decrease		
Update	CHG_PI	CHG Price Increase		
Update	CHG_SVDC	CHG Service Decrease		
Update	CHG_SVINC	CHG Service Increase		
Update	CMC	CHG Price roll back-competitor		
Update	CPI	CHG Price increase roll back		
Update	PII	CHG Individual Price Increase		
Update	ITD	CHG Temporary Del in Service		
Update	ITI	CHG Temporary Inr in Service		
Update	IDS	CHG Decrease in Service		
Update	REN	CHG Contract renewal		
Update	SVC	CHG Change in line of Business		
End	CDT	END Company driven Termination		
End	CLC	END Lost to Competition		

BALANCE WRITE OFF
?

**REASON CODE** ▾

**STATUS** Bal Dht ▾

**NOTE** [Text Area]

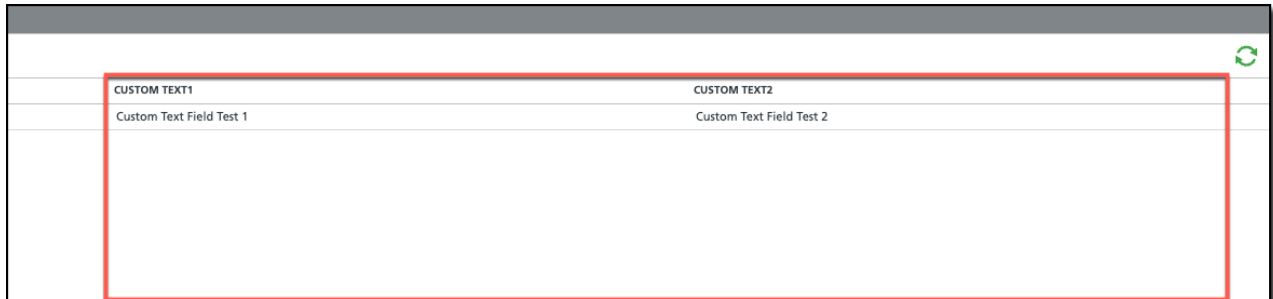
This process will write off customer's AR balance. Select Ok to continue.

OK

Pathway: *Set Up > System > Reason Code*

## Setup (Operations) - State Manifest Custom Fields (14603)[Enhancement]

Two new **Custom Text** fields have been added to State Manifest Setup screen.



Pathway: *Setup > Operations > State Manifest*

## Database

### Database - Bulk Account Portal Invite Changes (14657)

The following improvements have been made to the *Bulk Account Portal Invite* screen.

1. New Filters:

- Division (Required)
- Account Class
- Accounts With Automatic Payment (check box selection)

2. Updated Filters:

- Bill Group is no longer required

3. Load button added to load the screen based on the filter selections.

- Upon Load, the following counts display and are a hyperlink to a breakdown of the user accounts it includes:
  - Total Count
  - Active Services Count
  - Portal Invite Accepted
  - Invite Acceptance Pending
  - Portal Invite Not Sent

4. Send Email is available for selection after 'Email From' and 'Notification Template fields' are populated.

**BULK ACCOUNT PORTAL INVITES**

DIVISION:  EMAIL FROM:

ACCOUNT CLASS:  NOTIFICATION TEMPLATE:

BILL GROUP:

ACCOUNT SOURCE:

SITE SOURCE:

Total Count: 5    Active Services Count: 4    Portal Invite Accepted: 3    Invite Acceptance Pending: 1    Portal Invite Not Sent: 1

Accounts with Active Services  
 Accounts with Balance Due  
 Restrict to Billing Contacts  
 Accounts without Automatic Payment

For new & unactivated contacts, a new temporary password will be generated and sent to the contact.  
 No notifications will be sent to contacts that have already accepted an invitation.

Pathway: Database > Send Bulk Account Portal Invites

## Customer Portal

### Portal (Make a Payment)- Display Payment Processing Fee (14601)[Enhancement]

An enhancement has been made to calculate and display the payment processing fee after the user has selected a payment type.

**\$ 161.25** TOTAL DUE    **\$ 161.25** PAST DUE

Submit Payment Today to Avoid Suspension of all Services

REFERE...	DUE	AMOUNT	BALANCE	PAYMENT
803507	11/24/22	\$ 161.25	\$ 161.25	\$ 161.25

Pre-Payment Amount:

Note:     Payment Total: \$ 166.20

Type:

Name:

Confirmation Email:

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**\$ 161.25** TOTAL DUE    **\$ 161.25** PAST DUE

Submit Payment Today to Avoid Suspension of all Services

REFERE...	DUE	AMOUNT	BALANCE	PAYMENT
803507	11/24/22	\$ 161.25	\$ 161.25	\$ 161.25

Pre-Payment Amount:

Note:     Credit Card Fee: \$ 4.95    Payment Total: \$ 166.20

Type:

Name:

Card Number:

Month:     Year:

Zip Code:     CCV:

Confirmation Email:

[Back to Login](#)

Pathway: Portal; Make a Payment