Release Version 67 [Archive]

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

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

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.



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.

					CONT	CT		DI ANIVET DO	-
SCHEDULE DATE	REQUESTED BY				CONTA	ст	PO NUMBER	BLANKET PO	_ Q
11/18/22 Friday						~		~	
SERVICE CODE	OR	DER TYPE		QUANTITY	ROUTE		REASON CODE		
10 Yard CD Service (Coast Landfill) 📼 Ca	all - RO Dun	np/Return 👻	1 🌲		~		~	
ORDER NOTE									
						REPAYMENT			
DESTINATION / ORIGIN									
Coost Londfill	- 0								
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SERVICE CHARGES									_
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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.

Dec 1	Dec 2		Dec 3
v Dec 8	Dec 9		Dec 10
Dec 15	Dec 16		Dec 17
Dec 22	Christmas Dec 23	Christmas	Dec 24
B Dec 29	Code: MessageRejected; Request ID: c3804a42-9ff2-4 4512 - There has been a change to your automatic payment will see if this is sending when i expect it toooooo From: : Sent to: loris@navusoft.com	indieg und Click VIII (1990) 103-6431-11 Jelemailservice VII (2004: 400; Error c33-bdda-938cd6b79742; Proxy: null)Dear : method.	Dec 31

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.

UPDATE SERVICE CODE							? Ø		
Service Code Surcharges	Divisions								
SERVICE CODE	RO12ASB		ACTIVE		Yes		*		
NAME	12 Yard Asbestos Service		ENABLE F	ROUTING	Yes		-		
LINE OF BUSINESS	Roll Off	•	REQUIRE	FREQUENCY	Yes		-		
EQUIPMENT TYPE	12 Yard Roll Off 🛛 👻	\otimes	ENABLE [DRIVER UPDATE	No		-		
MATERIAL TYPE	Asbestos 👻	\otimes	ENABLE A	ACCOUNT SIGNATURE	No		*		
UOM	Month	-	ENABLE [DRIVER SIGNATURE	No		*		
TAXABLE	No 🔻 CLASS	•		WORK ORDER	No		•		
GL ACCOUNT		•	ENABLE F	RENTAL FEE	Yes		Ŧ		
PRORATION METHOD	Calendar Days - Start and End	•	ENABLE I	DEFAULT DESTINATION	No		*		
BILL WHILE ON CREDIT HOLD	Yes	•	ENABLE I	NEGATIVE AMOUNT	No		•		
IS AP TRANSACTION	No	*	ENABLE E	ESTIMATES TRACKING	Yes		- I		
EST MONTHLY VOL UOM	Cubicyard	•	ENBL EQU	UIPMENT OWNERSHIP	No		•		
IS SHELL	No	•	ENABLE S	5HARE	No		•		
PRICING MODEL	None	-							0.0
CALCULATE RATE PER YARD	Yes	EDIT	PROPOSAL -	· 18153	Attachment	Master Agreement	Estimated vs A	rtual	
CALCULATE RATE PER YARD	Yes None	EDIT Sett SITE ID	PROPOSAL - tings S QTY	• 18153 Services History SERVICE CODE FREC	Attachment	Master Agreement	Estimated vs A EST ORDERS/UNITS	ctual UOM	BOOKED BILLED
CALCULATE RATE PER YARD CALCULATION METHOD WORK TYPE EVENT CLASS	Yes None Roll off Services 💌	EDIT Sett SITE ID 27363	PROPOSAL - tings S QTY 1.00	18153 iervices History SERVICE CODE FREC 10 Yard CD Service 2x p	Attachment QUENCY ESTIMATE her week per mont	Master Agreement TYPE EST REVENUE h 150.00	Estimated vs A	uom Month	BOOKED BILLED
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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

WED	THU	FRI	SAT
Nov 30	Dec 1	ADD/EDIT MANUAL CHARGE	Dec 3
		CREATED BY Aliena Somers on 12/14/2022 12:41	pm
Dec 7	Dec 8	CHARGE CODE 42 Gallon RMW	- Dec 10
	S @ 42 Gallon RMW	QUANTITY 1.00	
		PER UNIT RATE 0.0000	
Dec 14	Der 15	AMOUNT 0.00	Dec 17
been	Decis	PO NUMBER	
		BLANKET PO	- Q
		DATE 12/08/2022	
Dec 21	Dec 22	NOTE	Dec 24
Dec 28	Dec 29	ATTACHMENT <u>View</u>	Dec 31
		SAVE DELETE DEL	

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.

VENDOR	MEBATE PAYMENTS									ACCOUNTING > V	ENDOR/REPATE PAYMENTS
In Proc	cess History										
0										Search	۵.0
	DIVISION	BATCH #	TYPE	METHOD	BANK ACCOUNT	DATE	STATUS	COUNT	PRINTED	POSTED	REMITTANCE
	Vendor \ Hauler \ Sub	1020	VendonRebate Payment Batch	Check	Clearwater 7993	10/23/2022	Open	1 (\$ 15.00)	1 (\$ 15.00)	1 (\$ 15.00)	
			CREATE CHECK BATCH TYPE Vendorflebala Dayson Date Bate Bate Account NOTE CREATE CREATE	2 O						54	rch Q 💿
VEND	DOR		INVOICE #	AVAILABLE APPLIED PREPAYMENTS PREPAYMENTS	TYPE	PROCESSING	AMOUNT	REFERENCE / CHECK NBR	PRINTING STATUS	ITEMS	POSTED STATUS

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.

VENDO	DR/REBATE PAYMENTS										ACCOUNTING > VEN	DOR/REBATE PAYMENTS	
In P	rocess History										8		
C											Search	3 🛛 ۵	
	DIVISION	BATCH #	TYPE		METHOD	BANK ACCOUNT	DATE	STATUS	COUNT	PRINTED	POSTED	REMITTANCE	
	Vendor \ Hauler \ Sub	1020	Vendor/Rebate Payment	В	Check	Clearwater 7993	10/23/2022	Open	1 (\$ 15.00)	0 (\$ 0.00)	0 (\$ 0.00)		
2	Vendor \ Hauler \ Sub	1021	Vendor/Rebate Payment	В	Credit Card	Clearwater 7993	10/23/2022	Open	2 (\$ 151.00)	0 (\$ 0.00)	0 (\$ 0.00)		
	NDOR amble Vendor		INVOICE # PF 576.00 007/0222	AVAILABLE BERAYMENTS	APPLIED PREPAYMENTS	TYPE Cedit Card This is paid by CC. Visa details	PROCESSING	AMOUNT \$ 76.00	REFERENCE / CHECK NOR	PRINTING STATUS NJA	3 Search	POSTED STATUS Noted]
			564										
D D	ample vendor		\$ 75.00			Credit Card		\$ 75.00		N/A		NOT Bostod	
	VENDOR/REBATE PAYMENT	s									ACCOU	NTING > VENDOR/REBATE	E PAYMENT
	In Process Histo	iry										4	
	DIVISION Training Divis	ion	Ŧ	FROM 1	10/24/2022	то 10/24/2022	LO	AD				Search	Q, ©
	BATCH #	TYPE		METHOD		BANK ACCOUNT	DATE	COUNT	IN	ICLUDED	PRINTED	POSTED	

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 TRANSAC	TION PROCESSING						
AR PERIOD	Sep 2022 -	LOAD					
Pending	In Progress Postec	Summary					
TYPE AI	· • •	Setup Errors (2)					
	TYPE	REFERENCE #	AR PERIOD	DATE	COUNT	ERRORS	
	Billing Batch	20548	2022-09	09/01/2022	4	4	Fix Errors
	Billing Batch	20755	2022-09	09/01/2022	1		
	Billing Batch	20756	2022-09	09/01/2022	20		
	Billing Batch	20758	2022-09	09/01/2022	4		
	Billing Batch	20759	2022-09	09/01/2022	8		
	Billing Batch	20761	2022-09	09/01/2022	4		
	Billing Batch	20794	2022-09	09/01/2022	3		
	Billing Batch	20795	2022-09	09/01/2022	4		
	Billing Batch	20796	2022-09	09/01/2022	3		
	Billing Batch	20797	2022-09	09/01/2022	3		

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.

EXPECTED INVOICE	GFL// (A3008518) 10/0	01/22 - 10/31/22 \$ 17	1.73			e		
VENDOR ID	A3008518							
	CBRE-UP5-ARLIA//ARL #1581003 1 Airport Drive Little Rock, AR 72202	IA - 8yd FL MSW A	ctive					
NVOICE #	A30000472431							
NVOICE DATE	01/04/2023	DUE DATE	12/15/202	22 [[]]				
ERVICE FROM	12/01/2022	SERVICE TO	12/31/202	22 111				
NVOICE AMOUNT	185.06	Expected Inv	voice Amount	\$ 171.73				
Vendor Invoice	Linked Account Inv	voices						
ADJUSTMENT		ADJUSTMEN	NT REASON COD	ε	*			
AY AMOUNT	185.06							
PAY AMOUNT	185.06 Dec 2022	*						
PAY AMOUNT PERIOD IOTES	185.06 Dec 2022 https://wasteologygre Production/Discovery	= oup.sharepoint.com %20Invoices/af4ee3	/:b:/r/sites/ If3be8df85	CREDIT INVOICE I	D	303271		
PAY AMOUNT PERIOD NOTES	185.06 Dec 2022 https://wasteologygre Production/Discovery 44a3b2399fbc8cee3.p	= pup.sharepoint.com %20Invoices/af4ee3 xdf?csf=1&web=1&e	/:b:/r/sites/ if3be8df85 ==a7QqUm	CREDIT INVOICE I CREDIT INVOICE I ACH - Ref # SM- 1/5/2023	D ALANCE ACH-\$690.25 1/5	303271 \$(370.12) \$/2023		
PAY AMOUNT PERIOD NOTES	185.06 Dec 2022 https://wasteologygre Production/Discovery 44a3b2399fbc8cee3.p	vup.sharepoint.com %20Invoices/af4ee3 xdf?csf=1&web=1&e	/:b:/r/sites/ /3be8df85 z=a7QqUm	CREDIT INVOICE I CREDIT INVOICE I ACH - Ref # SM- 1/5/2023	D ALANCE A.CH-\$690.25 1/5	303271 \$(370.12) \$/2023		
PAY AMOUNT PERIOD NOTES STATUS	185.06 Dec 2022 https://wasteologygre Production/Discovery 44a3b2399fbc8cee3.p ADD ATTACHMENTS Approved for Paymen	vup.sharepoint.com %20Invoices/af4ee3 xdf?csf=1&web=1&e	√:b:/r/sites/ /3be8df85 z=a7QqUm ~ ►	CREDIT INVOICE I CREDIT INVOICE E ACH - Ref # SM- 1/5/2023	D ALANCE A.C.H-\$690.25 1/5 ,2023 03:25 pm	303271 \$(370.12) \$/2023 by Sandee Webb		
PAY AMOUNT PERIOD NOTES	185.06 Dec 2022 https://wasteologygre Production/Discovery 44a3b2399fbc8cee3.p ADD ATTACHMENTS Approved for Paymen	wight the second secon	/:b:/r/sites/ If3be8df85 z=a7QqUm	CREDIT INVOICE I CREDIT INVOICE I ACH - Ref # SM- 1/5/2023	D ALANCE ACH-\$690.25 1/5 ,2023 03:25 pm	303271 \$(370.12) \$/2023 by Sandee Webb	0	

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 N	MANAGEMENT					
	Pending	History					
	AUDITOR		VENDOR		STATUS	DUE DATE FROM	DUE DATE TO
	All	~	All	*	Received, Hold, Waitin 💌		
	ACCOUNT		DATE	DUE DATE	INVOICE #	INVOICE AMOUNT	PAY AMOUNT
0	Example Account		11/01/2022	11/05/2022	24234	\$ 65.00	\$ 65.00

Pathway: Accounting > Vendor Invoice Management

Operations

Opertions (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 CALENDAR						OPERATIONS > RESOUR	ICE SCHEDULING > RESOURCE CALEND/
WORK ASSIGNMENT TYPE Driver, Helper, Technician, Truck	DIVISION	LINE OF earwater, DAY, NWA, v	BUSINESS End Load, Industrial, Landfill and T	 Week 49 (A) November, 2022 	0	Search	۹ 🛛 🕻
RESOURCE 🕆	SUN, NOV 27	MON, NOV 28	TUE, NOV 29	WED, NOV 30	THU, DEC 1	FRI, DEC 2	SAT, DEC 3
- WORKER							
Amber Hanson 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
Barry Anderson Ops Driver, Technician Front End Load, Portable Toilets, Roll Off			6:00 am - 6:00 pm		6:00 am - 6:00 pm Sick		
Brady Scheel Driver Driver Residential	6:00 am - 6:00 pm	6:00 am - 6:00 pm 8, Route 11-203 - Driver	6:00 am - 6:00 pm (8), Route 11-203 - Driver	6:00 am - 6:00 pm Route 11-20903 - Driver	6:00 am - 6:00 pm 8, Route 11-203 - Driver	6:00 am - 6:00 pm (), Route 11-203 - Driver	6:00 am - 6:00 pm
Brad Sovich Driver, Helper, Technician Residential, Roll Off				6:00 am - 6:00 pm			
<u>Candy Farah</u> Driver 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
<u>Chris Token</u> Driver 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 B Route 11-20901 - Driver	6:00 am - 6:00 pm	6:00 am - 6:00 pm	6:00 am - 6:00 pm
Chuck Morson Spv - Driver Driver, Technician Portable Toilets, Roll Off				6:00 am - 2:00 pm		\rm 🕵 Route 02-301 - Driver	
Cynthia Murdock Driver Driver Portable Tollets, Roll Off		6:00 am - 2:00 pm Route 02-604 - Driver	6:00 am - 2:00 pm 8 Route 02-604 - Driver	6:00 am - 2:00 pm Route 02-604 - Driver	\rm	\rm 4 Route 02-604 - Driver	
Dana Smith							

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.

CINDI ALFONSC) (SICK) - 1	SEPTEMBE	R 25, 2022 TH	IRU NOVE	EMBER 5, 202	2								? ⊗
О ТОР/	AY	〈 〉	Jump to:				GO					MONTI	ł	AGENDA
Cep 25,	2022		Mon 26		Tue	27		Wed 28		Thu 29		Fri 30		Oct 1
		Route 02	-604 - Driver	Route	02-604 - Drive	r	Route	02-604 - Driver	Route	02-604 - Driver	Route	02-604 - Driver		
	ADD WORI	KER AVAILAE	BILITY EXCEPTIO	N	? &									
	TYPE	Sick			~	4	Pourte	5	Pouto	6	Pouto	7 02.604 - Driver		8
	START DATI	E 10/06/20	22			H	Exception	Unscheduled	Excepti	ion Sick	noute	02 004 DIIVCI		
	END DATE	10/06/20	22					Absence		this is a note on 1 Created By: Lori S	0/6 for h heldt	er sick day		
	NOTE	this is a	note on 10/6 for l	ner sick day.						000 25 2022 0.507				
						1		12		13		14		15
							Route	02-604 - Driver	Route	02-604 - Driver	Route	02-604 - Driver		
			SAVE			Γ								

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.

DISPATCH					
FROM TO DIVISION					LIN
10/06/22 10/06/22 Augusta, CINCY	/, Clearwater, DAY, NWA, O	ldsmar, Orlando, Sarasota, Topeka, Training Divisio	on		▼ R
Standard 👻	Select Route Sh	eet 👻 🖨 🖨			
ROUTE 🕇		TRUCK			DRIVER
- Thursday Oct 6, 2022 (0 of 8 Completed)					
<u>02-601</u>		02-6005			Dave Pike - Support Analyst
<u>02-602</u>		02-6006			Ihor Rapalyuk - iOS Developer
<u>02-603</u>	EDIT ROUTE RECORD		? 😣	1	Michael Shannon - Tech Guy
<u>02-604</u>				\rightarrow	Cindi Jones - Driver (Sick)
<u>02-608</u>	TRUCK	02-6002	- 🛞		Marcellous Goodman (Inactive)
02-PASSTHRU	DRIVER	Cindi Jones - Driver (Sick)	- 0		
<u>11-301</u>			•		Tyler Parshaw
<u>12-301</u>	HELPER 1		- 🛞		Darryl Johnston - CLW Driver
	HELPER 2		• 🛞		
	MILES		\$		
	START TIME		Ŧ		
	END TIME		~		
	STATUS	Scheduled	Ŧ		
	DISPOSAL LOCATION		~		
	TRANSPORTER	Bobcast Disposal d/b/a Orion Waste Solutions	• 🛞		
	START YARD		• 🛞		
	END YARD		• 🛞		
		SAVE			

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: <u>Operations</u> > <u>Resource Scheduling</u> > <u>Worker Availability and Capability</u> - Select worker's name to open Worker Calendar; <u>Operations</u> > <u>Dispatch</u> - 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 AVAILABILI	TY AND CAPABILITY											
	All	✓ DEPAI	ATMENT All	~						Search	۵ 🛛 🕄	;
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						
Worker 5 Example	Residential, Roll Off	Weekly	01/01/2022					6:00 am - 6:00 pm 12 hours			•	
Worker 6 Exampl Driver	Front End Load,	Weekly	01/01/2021		6:00 am - 6:00 pm 12 hours	6:00 am - 6:00 pm						
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						
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 AVAILABILIT	TY AND CAPABILITY								
	All	DEPAR	TMENT All						
NAME 🕇	CAPABILITIES	TYPE	EFFECTIVE DATE	END DATE	SUNDAY	MONDAY	TUESDAY	WEDNESDAY	TH
Worker 1 Example Doc	Front End Load,	E 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 p
<u>Worker 1 Example</u> Doc	Front End Load,	E Weekly	03/01/2022	Double	click	8:30 am - 3:30 pm 7 hours			_
Worker 2 Example A/R	Residential	EDIT WORKER AVA	ILABILITY					?	:00 ai
Worker 3 Example Ops	Front End Load	WORKER	Worker 1 Exampl	e (Doc)	-				:00 a 1
Worker 4 Example Driver	Residential	ТҮРЕ	Weekly		~				:00 a 1
Worker 5 Example	Residential, Ro	EFFECTIVE DATE	03/01/2022						
Worker 6 Exampl Driver	Front End Load	END DATE							:00 a 1
Worker 7 Example Driver	Front End Load	SUNDAY START	~	HOURS	\$:00 a 1
Worker 8 Example VP of Sales	Front End Load	MONDAY START	8:30 AM 🛛 👻	HOURS	7 🌲				
Worker 9 Example Spv - Driver	Portable Toilet	TUESDAY START	-	HOURS	\$				
Worker 10 Example Driver	Portable Toilet	WEDNESDAY START	-	HOURS	\$:00 a
Worker 10 Example Driver	Portable Toilet	THURSDAY START	~	HOURS	*				:00 a
CT ct@navusoft.c	Front End Loac	FRIDAY START	~	HOURS	*				
Dale Henderson Site Manager	Front End Loac	SATURDAY START	v	HOURS	\$:00 a 1
Daniel Anspach Ops Supervisor	Front End Load							2	aved. :00 an
Dawy Johnston	Front End Load	Weekly	01/01/2021			6:00 am - 6:00 pm	6:00 am - 6:00 pm	6:00 am - 6:00 pm	6:00 a

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.

DIS	PATC	н			
FR	MC	то	DIVISION		LINE OF BUSINESS
1	1/07/2	11/07/22	Augusta, Clearwater, NWA, Oldsmar,	Orlando, Sarasota, Topeka, Training Division	 Roll Off, Residential
St	anda	ard	- Select Rou	ite Sheet 👻 🖨 🛔 🔁	
		ROUTE 🕇	TRUCK	DRIVER	PRE TRIP POST TRIP OPTIMIZI
	Mond	day Nov 7, 2022 (0 of 13	Completed)		
		11-201	<u>360</u>	Edward Smith - Driver (Sick)	
		11-202	20014	David Johnson - Driver	
		11-203	<u>20012</u>	Bill	
		11-204	20015	EDIT ROUTE RECORD	4 ⊗
		11-205	20072	Hee TRUCK	360 - 😪
		11-208			
		<u>11-301</u>	30005	Tyle DRIVER	Edward Smith - Driver (Sick) 👻 🛞
		<u>12-201</u>	20074	Eric HEIDER 1	Myriam Jones - Operations Specialist (Not Available)
		12-202	20076	Will	Navusoft
		12-20901	20075	Sad HELPER 2	Navusoft m
		12-301	30068	Dar	Nelson Pearce
		<u>P-205</u>	Rental REL1	Nav MILES	Olivia Paige - Mobile Engineer
				START TIME	Orion Sandbox
					Pat Cartalemi - Project Manager (Not Available)
				END TIME	Pedro Edwards
				STATUS	Rafael Hernandez
					Robert Zander - Driver
				DISPOSAL LOCATION	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							OPERATIONS > RESOURCE CALENDAR
DIVISION	1	LINE OF BUSINESS		Week 46 (B)			
Augusta, CINCY, Clearwater, DAY, N	WA, Oldsmar, Orlando, Sarasota 👻	Front End Load, Industrial, Landfill and	Transfer, Medical Waste, Po 👻	November, 2022		Search	Q @ Q
RESOURCE 🕇	SUN, NOV 6	MON, NOV 7	TUE, NOV 8	WED, NOV 9	THU, NOV 10	FRI, NOV 11	SAT, NOV 12
Front End Load, Roll Off							
Edward Langley Driver 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	6:00 am - 6:00 pm Day Off () & Route 11-201 - Driver	6:00 am - 6:00 pm (98) 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	\rm 🖪 Route 04-103 - Driver	🚺 🦔 Route 04-103 - Driver	🚺 🦔 Route 04-103 - Driver
Eric Neils		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
Driver Driver Residential		🦔 Route 12-201 - Driver	🦔 Route 12-201 - Driver	🦔 Route 12-201 - Driver	🦔 Route 12-201 - Driver	3 Route 12-201 - Driver	Route 12-201 - Driver
Eric Richards Driver 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 Soute 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	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 (1) 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		6:00 pm - 6:00 am	6:00 pm - 6:00 am	🚺 🦔 Route 02-601 - Driver	3 Route 02-601 - Driver		
Driver Driver Front End Load		38, 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							🔹 📀
Example Account	WORK ORDER	QTY	SERVICE CODE	EQUIPMENT	WORK TYPE	ORDER TYPE	MATERIAL
123 Navu Ave W	4261991	1	8 Yard OCC Service	81	FL_EXTRAPU	On Call	CARDBOARD
Largo, FL 33773-1649	ORDER NOTES						
PHONE +1 555-555-1234							
CREATED BY	PO NUMBER		EXTERNAL ID				
Lori Sheldt on 11/2/22 4:00 pm							
ORDER REASON	DESTINATION / OF	RIGIN					
-	One Stop Lands	cape					- · · · · · · · · · · · · · · · · · · ·
ACCESS	SCHEDULED DATE		ROUTE		SEQUENCE		
	11/23/22 Wedne	esday	11-100	- 🛞	0 🌲		
	Originally sched	uled Thurs	day 11/3/22 reschedul	ed by Lori Sheld	t on 11/28/22 10:27	am	
	WORK STATUS			POS	STING STATUS		
SITE NOTE	Scheduled			✓ Pe	nding		*
SVC NOTE							
Completion Data Charges Atta	achments La	bels	Labor Pho	otos 1			
Completion Data Charges Atta	achments La SCHEDULED HOURS	bels ACTUA HOURS	Labor Pho L NOTES	otos 1			
Completion Data Charges Atta TECHNICIAN Amber Freed - Technician	achments La SCHEDULED HOURS	bels ACTUA HOURS	Labor Pho L NOTES	ytos 1			
Completion Data Charges Atta TECHNICIAN Amber Freed - Technician Ben Smith - Technician (Not Available)	schments La SCHEDULED HOURS	bels ACTUA HOURS	Labor Pho L NOTES	otos 1			
Completion Data Charges Atta TECHNICIAN Amber Freed - Technician Ben Smith - Technician (Not Available) Charles Pacson - Technician	achments La SCHEDULED HOURS	bels ACTUA HOURS	Labor Pho	otos 1			
Completion Data Charges Atta TECHNICIAN Amber Freed - Technician Ben Smith - Technician (Not Available) Charles Pacson - Technician Dale Schmidt - Technician (Not Available)	achments La SCHEDULED HOURS	ACTUA HOURS	Labor Pho	otos 1			
Completion Data Charges Atta TECHNICIAN Amber Freed - Technician Amber Freed - Technician (Not Available) Charles Pacson - Technician Dale Schmidt - Technician (Not Available) Dan Orlando - Technician Supervisor	achments La SCHEDULED HOURS	ACTUA HOURS	Labor Pho L NOTES	otos 1			
Completion Data Charges Atta TECHNICIAN Amber Freed - Technician Amber Freed - Technician Ben Smith - Technician (Not Available) Charles Pacson - Technician Dale Schmidt - Technician (Not Available) Dale Schmidt - Technician Supervisor Dan Orlando - Technician Supervisor Dave Pike - Technician Supervisor	achments La SCHEDULED HOURS	ACTUA HOURS	Labor Pho L NOTES	otos 1			
Completion Data Charges Atta TECHNICIAN	achments La SCHEDULED HOURS	ACTUA HOURS	Labor Pho L NOTES	stos 1			
Completion Data Charges Atta TECHNICIAN	achments La SCHEDULED HOURS	ACTUA HOURS	Labor Pho L NOTES	stos 1			
Completion Data Charges Atta TECHNICIAN	achments La SCHEDULED HOURS	ACTUA HOURS	Labor Pho	stos 1			
Completion Data Charges Atta TECHNICIAN	achments La SCHEDULED HOURS	ACTUA HOURS	Labor Pho	otos 1			

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 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.

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

Not 13 Not 10 Not	SERVICE HISTORY (26)	Dispatch	- E									0
H3 Metrice Matrixe Metrixe	ROUTE	seq 🕆	ORDER NOTE	SCHEDULED DATE †	CREATED ON	WO#	WO TYPE	SERVICE TYPE	QTY	EQUIPMENT	PO / BLANKET PO	PHOTOS
Problem Statute	1153			Wed 9/21/22	8/7/22 3:00am	3848823	Scheduled Service COMPLETED	FL Service	1	6 Yard		e =
113 113 114 <td></td> <td></td> <td></td> <td>Thu 9/22/22</td> <td>9/22/22 9:33am</td> <td>4067752</td> <td>On Call COMPLETED</td> <td>FL Extra Pick Up</td> <td>1</td> <td>6 Yard</td> <td></td> <td>0</td>				Thu 9/22/22	9/22/22 9:33am	4067752	On Call COMPLETED	FL Extra Pick Up	1	6 Yard		0
Product Statut Statut </td <td>1153</td> <td></td> <td></td> <td>Wed 9/28/22</td> <td>8/14/22 3:00am</td> <td>3887855</td> <td>Scheduled Service</td> <td>FL Service</td> <td>1</td> <td>6 Yard</td> <td></td> <td>0</td>	1153			Wed 9/28/22	8/14/22 3:00am	3887855	Scheduled Service	FL Service	1	6 Yard		0
113 Nind				Thu 9/29/22	9/29/22 9:56am	4100006	On Call	FL Extra Pick Up Dest: Ajax- Quarry	,	6 Yard	2223	0
113 113 112	1153			Wed 10/5/22	8/21/22 3:00am	3920159	Scheduled Service	FL Service	1	6 Yard		0
113 Mark (Mark (Ma	1153			Wed 10/12/22	8/28/22 3:00am	3952453	Scheduled Service	FL Service	1	6 Yard		0
113Image: 1 market of the model	1153			Wed 10/19/22	9/4/22 3:00am	3984689	Scheduled Service	FL Service	1	6 Yard		0
1111 111 111 112 <th< td=""><td>1153</td><td></td><td></td><td>Wed 10/26/22</td><td>9/11/22 3:00am</td><td>4016947</td><td>Scheduled Service</td><td>FL Service</td><td>1</td><td>6 Yard</td><td></td><td>0</td></th<>	1153			Wed 10/26/22	9/11/22 3:00am	4016947	Scheduled Service	FL Service	1	6 Yard		0
113 open reducts with watch due with	1161		this is work order notes on delivery, route 11-100	Tue 11/1/22	11/2/22 8:58am	4261990 *	Add Service	FL Delivery	2	8 Yard		0
$\begin and set of the set of th$	1153		order notes on the work order	Wed 11/2/22	9/18/22 3:00am	4049214 *	Scheduled Service	FL Service	1	6 Yard		0
$113 \\ 113 \\ 114 \\ 115 $	1153			Wed 11/9/22	9/25/22 3:00am	4081484	Scheduled Service	FL Service	1	6 Yard		0
Barlow Bizzz <	1153			Wed 11/16/22	10/2/22 3:00am	4113723	Scheduled Service	FL Service	1	6 Yard		0
				Tue 11/22/22	11/22/22 4:26pm	4357229	On Call NOT SERVICED FL-Bin Blocked	FL Extra Pick Up	1	6 Yard		0
113 Will (2) Wil	1161		this is my order note for this oncall I am entering	Wed 11/23/22	11/2/22 4:00pm	4261991 *	On Call	FL Extra Pick Up Dest: One Stop Landscape	1	8 Yard		' 👄
$ \begin{array}{ c c c c c c c c c c c c c c c c c c c$	1153			Wed 11/23/22	10/9/22 3:00am	4146045	Scheduled Service	FL Service	1	6 Yard		0
H31 H112 H1122 H1				Fri 11/25/22	11/22/22 4:29pm	4357230	On Call	FL Extra Pick Up	1	6 Yard		0
113 0	1153			Wed 11/30/22	10/16/22 3:00am	4178006	Scheduled Service NOT SERVICED	FL Service	1	6 Yard		1 0
H33 Mig 10 Mig 10 <td>1153</td> <td></td> <td></td> <td>Wed 12/7/22</td> <td>10/23/22 3:00am</td> <td>4210275</td> <td>Scheduled Service</td> <td>FL Service</td> <td>1</td> <td>6 Yard</td> <td></td> <td>0</td>	1153			Wed 12/7/22	10/23/22 3:00am	4210275	Scheduled Service	FL Service	1	6 Yard		0
113 (Mi 12)	1153			Wed 12/14/22	10/30/22 3:00am	4242521	Scheduled Service	FL Service	1	6 Yard		0
113 0 Wir1 200 1 Vitr2 Z Min 400 Z Min 5 deaded Strive 1. Strive 1 6 Yard 6 Be 113 Wir1 201 1 Vitr2 Z Z Min 40 Min 5 deaded Strive 1. Strive 1 6 Yard 6 Be 113 Wir1 201 1 Vitr2 Z Z Min 40 Min 5 deaded Strive 1. Strive 1 6 Yard 6 Be 113 Wir1 201 1 Vitr2 Z Z Min 40 Min 5 deaded Strive 1. Strive 1 6 Yard 6 Be 113 Wir1 201 1 Vitr2 Z Z Min 40 Min 5 deaded Strive 1. Strive 1 6 Yard 6 Be 113 Wir1 201 1 Vitr2 Z Z Min 40 Min 5 deaded Strive 1. Strive 1 6 Yard 6 Be 113 Wir1 201 1 Vitr2 Z Win 40 Min 5 deaded Strive 1. Strive 1 6 Yard 6 Be	1153			Wed 12/21/22	11/6/22 3:00am	4274804	Scheduled Service	FL Service	1	6 Yard		1 🖨
113 Writ 102 10202 XBW 40344 Seekald Strive F. Karica 1 Fard Part 113 Writ 102 10202 XBW 40345 Seekald Strive F. Soriez 1 Strid Part 113 Writ 102 11202 XBW 40305 Seekald Strive 1. Soriez 1 Strid Part 113 Writ 102 1112 XBW 40385 Seekald Strive K. Soriez 1 Strid Part 113 Writ 102 1112 XBW 40385 Seekald Strive K. Soriez 1 Strid Part 113 Writ 102 1112 XBW 40386 Seekald Strive K. Soriez 1 Strid Part	1153			Wed 12/28/22	11/13/22 3:00am	4307120	Scheduled Service	FL Service	1	6 Yard		0
113 Wei 1/12 1/2022 XBW 40786 Seekalde Strive F. Sarvia 1 6 Yead ⊕ 113 Wei 1/12 2022 XBW 40846 Seekalde Strive F. Sarvia 1 6 Yead ⊕ 113 Wei 1/12 20122 XBW 40846 Seekalde Strive F. Sarvia 1 6 Yead ⊕ 113 Wei 1/12 20122 XBW 40846 Seekalde Strive F. Sarvia 1 6 Yead ⊕ 113 Wei 1/12 20122 XBW 40846 Seekalde Strive F. Sarvia 1 6 Yead ⊕	1153			Wed 1/4/23	11/20/22 3:00em	4339484	Scheduled Service	FL Service	1	6 Yard		0
113 Web 102 14022 30w 46039 Seeded Serice F.Serice 1 6 Yes 6 113 Web 102 31122 330w 446895 Seeded Serice F.Serice 1 6 Yes 6 113 Web 202 VB122 330w 446895 Seeded Serice F.Serice 1 6 Yes 6 113 Web 202 VB122 300w 446895 Seeded Serice F.Serice 6 Yes 6 Yes 6 <t< td=""><td>1153</td><td></td><td></td><td>Wed 1/11/23</td><td>11/27/22 3:00am</td><td>4371845</td><td>Scheduled Service</td><td>FL Service</td><td>1</td><td>6 Yard</td><td></td><td>0</td></t<>	1153			Wed 1/11/23	11/27/22 3:00am	4371845	Scheduled Service	FL Service	1	6 Yard		0
113 Wei 703 21702 Xbin 40688 Seeded Strive T. Strive 1 City B 113 Wei 703 21702 Xbin 40056 Seeded Strive T. Strive 1 City B 113 Wei 703 21702 Xbin 40056 Seeded Strive T. Strive 1 City B	1153			Wed 1/18/23	12/4/22 3:00am	4404303	Scheduled Service	FL Service	1	6 Yard		0
1133 Wed 21/23 12/18/2 3:00em 466895 Scheduled Service TL Service 1 6 Yard 🕀	1153			Wed 1/25/23	12/11/22 3:00am	4436588	Scheduled Service	FL Service	1	6 Yard		0
	1153			Wed 2/1/23	12/18/22 3:00am	4468905	Scheduled Service	FL Service	1	6 Yard		8

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.

DISPATCH								OPERATION	S > DISPATCH
FROM TO DIVISION		LINE OF BUSINESS							
11/01/22 🧱 11/01/22 🔠 Augusta, Clearwater, NWA, Oldsmar, Orlando, Sarasota, Topeka, Training Divisio	1	 Portable Toilets, Residentia 	l, Roll Off, Medical Waste,	Landfill and Transfer, Industrial, Front End Load			Ψ	0	OAD
Crews 🔹 🖉 Select Route Sheet 💌 🍘 🎒 😋						Sea	ch		Q ()
ROUTE CREW MEMBERS	LABOR SUMMARY	MATERIALS	TRUCK	DRIVER	PRE TRIP POST TRIP SCHEDULED	SERVICED	PENDING	DO NOT SERVICE	EXCEPTIONS
- Tuesday Nov 1, 2022 (0 of 32 Completed)									
	None	2			1	0	1_(100%)	0	0
	None	0			2	0	2.(100%)	0	0
02-101	None	ROUTE LABOR SUMMARY			? ⊗ 1	0	1.(100%)	۰	0
© 02.300	Chuck Daniels IV - Sev (Not Available 4 2 Crystal Smith - Customer Service Rep (Inactive) 2 1	TECHNICIAN	SCHEDULED ACTUAL HOURS HOURS	NOTES	3	0	3.(190%)	0	0
③ ④ \$22:301	None	WO# 4046022 - Solid Rock Florida - 630	Flotilla Dr, Holmes Beach		1	0	1.(1995)	0	0
③ 92401	None	Chuck Daniels IV - Sov (Not Available)	4.00		1.om 22	0	<u>22 (76%)</u>	7.(24%)	0
③ 92-692	None	Crystal Smith - Customer Service Rep ().	2 1		28	0	33 (87%)	5(13%)	0
③ 92-603	None				41	0	38 (93%)	3(7%)	0
③ 92:604	None				25	0	<u>10 (38%</u>)	16 (62%)	0
③ 92.608	None				1	0	0	1.(100%)	0
02-PASSTHRU	None				2	0	2(100%)	0	0
9 94-102	None				62	0	62 (100%)	0	0
04-103	None				51	0	53 (100%)	٥	0
04-104	None				67	0	67 (100%)	0	0
94-151	None				32	0	30 (100%)	0	0
11-109	None				2	0	2.(100%)	0	0
③ 11-101	None	1			42	0	<u>29 (83%)</u>	<u>8 (17%)</u>	0



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/SH	HIP RECORD										?	8
START DATE	START TIME	END DATE	END TIME		DESTINAT	ION/ ORIGIN	I			TANK		
10/23/22 Sun	12:10 AM 👒	10/23/22 Sun	1:00 AM	Ŧ	Ajax- Qı	uarry						*
TRANSPORT METHOD			VEHICLE ID					EXTERNAL T	ICKET #			
Truck		~	Truck1					1234MPS				
MATERIAL	WEIGH	T IN WEIGHT	DUT QTY	UO	м	MIN QTY	DISPOSAL	RATE	FEE1	FEE2	TOTAL CO	DST
Concrete	-		0	Тс	on –	0	10.0000	Ton	0.00	0.00	0.00	
NOTES												
Ticket Image												
<table-cell-rows> 🗹 Include T</table-cell-rows>	Ticket Image Wit	th 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								8
Example Account 1234 Washington Ave Ste 100 San Jose 92029 CREATED BY Jessica Johnson on 8/31/22 3:00 am	WORK ORD 1707929 ORDER NOTE	DER QTY) 1 :S	SER Regulated	VICE CODE I Medical Waste	WORK TYPE RMWSVC	: O Sche	RDER TYPE M duled Service	ATERIAL RMW
ORDER REASON	PO NUMBER		EXTERNAL I	>				
SITE NOTE SVC NOTE site already has containers. this is a change of address Completion Data	SCHEDULED 11/29/22 Tu WORK STATU Service Cor Update Histo	DATE Jesday JS mpleted Jy, John Doe	ROUTE CA-503	EXCEPTION REASON	SEQ 0	UENCE DES POS Bil	STINATION / ORIGIN STING STATUS led - Invoice # 1244957 Robert Smith on 11	Nov 30, 2022 /30/22 9:55 am
Saarda Labal								
LABEL CHARGE CODE EC	QUIPMENT TYPE	TARE WEIGHT	GROSS WEIGHT	NET MANUA WEIGHT WEIGHT	L SCAN	ватсн	CONSOLIDATION 1 BATCH 2 BATCH 3	
1707929-77609 3.2gal Non-Haz 3	.2gal Non Haz	4.2	8.1	3.9	Example Loc	ati 3034		
1707929-77609 3.2gal Non-Haz 3	.2gal Non Haz	4.2	8.3	4.1	Example Loc	ati 3034		
1707929-77609 3.2gal Non-Haz 3	.2gal Non Haz	4.2	10.2	6	Example Loc	ati 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 Example Account 123 Navusoft Pkwy POINCIANA, FL 34759 PHONE (555) 555-1234	WORK ORDER QTY SERVICE CODE EQUIPMENT WORK TYPE ORDER TYPE 4028334 1 6 Yard Recycle Service 6Y FL_SERVICE Scheduled Service SCHED. DATE ROUTE SEQUENCE ACTUAL QTY 10/27/22 Thursday 04-103 © 0 0.00 WORK STATUS POSTING STATUS Scheduled © Pending	MATERIAL MX_REC
CREATED BY Navusoft on 9/12/22 3:00 am REASON	ORDER NOTES	
Completion Data Charges Lab T	ests Attachments Labels Labor 🎱 Photos	
EMPLOYEE	SCHEDULED BOOKED NOTES HOURS HOURS	
John Doe - Route Manager	8	0

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 CONSO	LIDATION BATCH 1	000 - 10/28/2022 L	ABELS							?	8
•	~								Search	Q,	\otimes
SITE	EQUIPMENT	CHARGE CODE	MATERIAL TYPE	WO #	LABEL	GROSS WEIGHT	NET WEIGHT	SCANNED TIME			
2021-THE JINGLE 5K RUN	42 Gallon	42 Gallon Chemo		<u>4132289</u>	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		<u>4132289</u>	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.

	Pending Current	Te-Number		
	Select Division	▼ Select Service Region ▼ Select LO8	Select Weekday Monday Tuesday	LOAD
	LOCATION	ADDRESS	Wednesday	ERVICE CODE
ADD ACTIVE SERVICE REASON CODE ADD-New Customer	START DATE 01/27/23 Frid	day 💠 Week 4 (A) N/A per cubic yard (new)	Saturday	
QTY EQUIPMENT SERVICE CODI 1 10 Yard Roll Off	E FF cycle Service 👻 💽	REQUENCY PER UNIT SERVICE FEES Every 10 Days 0.0000 0.00 	Every X Days	
REQUESTED BY		Map - Dal Abilene Fort Wortho		
		S / N		

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).

DISPOS	AL / SHIP LO	OCATION SETUP													SETUP > 0	OPERATIONS > DIS	POSAL / SHIP	LOCATION
Ð	TYPE	All	~	DIVISION	All		~								Search		Q,	0
ID		NAME		TYPE		ACTIVE	CITY	STATE	ZIP	DEFAULT UOM	DIVISION	SCALE PAYLOAD START OFFSET	SCALE PAYLOAD LENGTH	OWN	VERSHIP	SIGNATURE BY	SIGN	ICON
1000	Saraso	ata County - S		Processir	ıg	Active	Sarasota	FL	34241-6312	Gallon	Sarasota			Int	ernal			
1001	Mar	natee County		Landfil		Active	Bradenton	FL	34211-9458	Ton	Sarasota			Int	ernal			
1002	Aj	jax- Quarry		Landfil		Active	Nokomis	FL	34275-3624	Ton	Sarasota			Int	ernal			
1003		Crush It		Landfil	I	Active	Nokomis	FL	34275-3624	Ton	Sarasota			Int	ernal			
1004	Grab	er Excavation		Processir	ng	Active	Sarasota	FL	34243	Ton	Sarasota			Int	ernal			
1005	Mcleo	d Land Services		Processir	ng	Active	Sarasota	FL	34243-3350	Ton	Sarasota			Int	ernal			
1006	M	laster Rock		Processin	ıg	Active	Sarasota	FL	34234	Ton	Sarasota			Int	ernal			
1007	One S	itop Landscape		Processin	ıg	Active	Sarasota	FL	34243	Ton	Sarasota			Int	ernal			
1008	Saraso	ota LF CCSWDC		Landfil		Active	Nokomis	FL	34275	Ton	Sarasota			Int	ternal			
1009	Sun	coast Metals		Recycle Ce		Active	Sarasota	FL	34234-3112	Ton	Sarasota			Int	ternal			
1010	Trader	mark Metals		Recycle Ce		Active	Sarasota	FL	34234-4818	Ton	Sarasota			Int	ernal			
1011	Gr	een for Llfe		Transfer St		Active	Bradenton	FL	34203-5021	Ton	Sarasota			Int	ernal			
Divisi	ion	Material Type		Disposal I	Rate	Targe	et Usage	Business Hou	rs Areas	Grids	e+-			1				
C.																		
EFFECT	IVE DAIL			MATERIAL 1	YPE				TARGET TYPE			TIME PERIOD				TARGET	UOM	
		· · ·	ADD	USAGE TAI	RGET				? 😣									
			DISP	POSAL LOCAT	TION C	One Stop La	ndscape		- 1									
_			EFFE	CTIVE DATE										_				
			MAT	TERIAL TYPE				Ŧ	\odot									
			TAR	GET TYPE					•									
			тімі	E PERIOD					Ŧ									
			TAR	GET VALUE					- 1									
							SAVE											

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 LOC	CATION USAGE				OPERATIONS > DISPOSAL LO	CATION USAGE	
Targets	Usage History						
DIVISION						~	
Augusta, Cle	earwater, NWA, Oldsm	ar, Orlando, Sarasota, Topeka, Training Divis	ion 👻			2	
				Search Q 🛞	Search	Q, 🛞	
DISPOSAL LOCA	ATION 🕇	ACTIVITY TO DATE	PENDING ACTIVITY	TARGET	UNASSIGNED LOADS 🕇		
A Waste & Red	cycling	12/01/2022 - 12/28/2022	12/28/2022 - 12/31/2022	Monthly target - 1,000 tons	Route 02-601 - 12/29/22 30 stops - Est. Volume: 500		
		1 load 3,000 tons \$0.00	No Pending Activity	300% with 3 days remaining	Route 02-602 - 12/29/22 31 stops - Est. Volume: 0		
Ajax- Quarry		12/01/2022 - 12/28/2022	12/28/2022 - 12/31/2022	No Target Set	Route 02-604 - 12/29/22 21 stops - Est, Volume: 500		
		No Activity Found	No Pending Activity	Click to add target	Route 02-608 - 12/29/22		
Blue Monkey I	Disposal and Recy	12/01/2022 - 12/28/2022	12/28/2022 - 12/31/2022	No Target Set <u>Click to add target</u> <u>Click to add target <u>Click to add target</u> <u>Click to add target <u>Click to add </u></u></u>			
		2 loads 255.2 tons \$13,990.00	No Pending Activity	Circle to and target	Route 02-PASSTHRU - 12/29/22 2 stops - Est. Volume: 0 Route 04-102 - 12/29/22		
Charlotte Ctv-	-Landfill	12/01/2022 - 12/28/2022	12/28/2022 - 12/31/2022	No Target Set	65 stops - Est. Volume: 334		
		1 load	No Pending Activity	Click to add target	Route 04-103 - 12/29/22 58 stops - Est. Volume: 416		
		\$0.00			Route 04-104 - 12/29/22 70 stops - Est Volume: 430		
Coast Landfill		12/01/2022 - 12/28/2022	12/28/2022 - 12/31/2022 2 routes	No Target Set Click to add target	Route 04-151 - 12/29/22 33 stops - Est. Volume: 196		
		4,185.3 cubicyards \$36,412.11	68 stops 70 containers - est. volume 250		Route 11-101 - 12/29/22 46 stops - Est. Volume: 280		
Crush It		12/01/2022 - 12/28/2022	12/28/2022 - 12/31/2022	No Target Set Click to add target	Route 11-10901 - 12/29/22		
		No Activity Found	No Pending Activity	-	2 stops - Est. Volume: 16		
Dakin Natural	l Soils	12/01/2022 - 12/28/2022	12/28/2022 - 12/31/2022	No Target Set Click to add target	Route 11-202 - 12/29/22 664 stops - Est. Volume: 351		
		No Activity Found	No Pending Activity		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

e e e	00) 📌 🥐 (
	SERVICE REGION	LINE OF BUSINESS	EQUIPMENT			3	Soarch	0.0
	All	<u>ش</u>		LOAD			Jearch	
EQUIPMENT	Fort Myers	QTY SITE ID	SITE		SERIAL NUMBER	LAST ACTIVITY	DAY(S) SINCE LAST ACTIVITY	AVG DAY(S) BETWEEN ACTIVITY

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.

A	Route COR	203R		Tue Jan 24, 2023		
OA Login	ADDRESS Corpus Christi, TX, 78407	QTY E 1 8 1	EQUIP BYD 1x per week	MATERIAL Recycle	WORKTYPE FL_SERVICE ORDER# 5209592	
1 -8yd Recycle - slant wo side doors 2 - 6yd slant wo side doors	CONFUS OPEN MARKET		1			

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 SERVI	CE RECORD							? 😣
JOHN		WORK OR	DER QTY	SERVICE CODE	EQUIPMEN	T WORK TYPE	ORDER TYPE	MATERIAL
SMITH		39128	/ 1	10 Yard Trash Service	IUYKO	RO_DOMPRET	Scheduled Service	TRASH
PALM HAR	BOR, FL 34683	SCHED. DA	E	ROUTE		SEQUENCE ACTU	AL QTY	
PHONE	(777) 777-7777	10/03/22	londay	11-301		0 1.00		
ACCESS	Access Info!	WORK STAT	US		P	OSTING STATUS Lori S	heldt on 10/25/22 8:27 am	
SITE NOTE	location note	Service Co	mpleted			Billed - Invoice # 9232	238 Oct 25, 2022	
		PO NUMBE		EXTERNAL ID				
		ORDER NOT	ES					
CREATED BY	,							
Dave Pike	on 8/19/22 3:00 am							
REASON								
Completio	on Data Charges	Disposal/ Ship	Lab Test	s Attachments	Labels	Labor	Photos	
	START	Click to Set	Stop was nev	ver set to IN PROGRESS				
	END	10/25/22 8:27 am	Lori Sheldt -	Acct Asst setting status to	SERVICE CON	IPLETED		
	DISPOSAL ARRIVAL	10/24/22 7:00 am	to Coast Lan	dfill				
	DISPOSAL DEPARTURE	10/24/22 8:15 am	from Coast L	andfill				
No Deiro	Since the Contract of St							
NO Driver	signature / No Customer Si	gnature						
COMPLETIC	NAVEAGEP TION NOTES							
Select Print	t 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 👻 🛞			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.

туре В	illed by Account (Class		Ŧ									
YEAR	DIVISION			SERVICE REGION									
2023 👻	🛞 🛛 !ka, Trainin	g Division	- 🛛	All		• 🛞	LO	AD					
	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	ост	NOV	DEC	TOTAL
Commercial	<u>3,672.87</u>	0.00	0.00	<u>1,761.44</u>	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
Total	461,794.78	184.02	0.00	454,571.06	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	916,549.86

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

		7					
LOB AII	NAME	LOB	ACTION CATEG	GORY	INVENTORY MOVE TYPE	MANIFEST NO TEMPLATE	TIFICAT
DUMPONLY	Dump Only	Roll Off			None		
RETURNBOX	Return Box	Roll Off			None		
RO_DELIVER	RO Delivery	Roll Off	Delivery		Delivery		
RO_DUMPRET	RO Dump/Return	1				-	
RO_DUMPRMV	RO Dump/Remove	UPDATE WORK	ТҮРЕ			? 😣	
RO_RELOCAT	RO Relocate	Work Tune		Charge Carls			
RO_REMOVE	RO Removal	work type	Add/Remove Default	Charge Code			
RO_REPAIR	RO\Packer Repair	ID		RO_DELIVER			
RO_Return	Return Yard Box Only						
RO_SWAP	RO Swap	NAME		RO Delivery			
		LOB		Roll Off			
		(INVENTORY MOVE	ТҮРЕ	Delivery	~		-
		ACTION CATEGOR	r	Delivery	- 0		
		ORDER BASELINE	SECONDS				
		DEFAULT SECOND	5 PER UNIT	0			
		MANIFEST NOTIFIC	ATION TEMPLATE		~		
		CREATE ONE SERV	ICE RECORD PER OLIANTITY	Yes	~		
		Sherie She Jenv					
		ENABLE DISPOSAL	OR MATERIAL ENTRY	None	Ψ		
		ENABLE CONSOLID	DATION BATCH LINK	No	~		
		ENABLE DRIVER EN	ITERED LABEL WEIGHTS	No	Ŧ		
		ENABLE DRIVER PH	IOTO PROMPT	No	~		
		PRODUCTIVITY UN	ITS	1.00			
		ALLOW ACCOUNT	PORTAL ENTRY	No	~		
		ENABLE DRIVER TO) SET IN PROGRESS	No	~	1	
				1 C C C C C C C C C C C C C C C C C C C			

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 SETU					SETUP > SYSTEM	I > REASON CODE
С туре	Service Exception +					O
	туре 🕆	REASON CODE 🕆	NAME	LACCOUNT	WO NEW STATUS	
	Service Exception	BLCART	Blocked Cart		Not Serviced	
	Service Exception	FLBLOCKED	Ri-Bin Blocked		Not Serviced	
	Service Exception	FLRECCONT	FL-Recycling Contaminated		Service Completed	(
	Service Exception	PT_BLOCKED	PT-Blockeda		Not Serviced	
	Service Exception	RENOCAOUT	No Cart Out		Not Serviced	(
	Service Exception	ReNotAcces	Not Accessible		Not Serviced	
	Service Exception	RERECCONT	Recycling Contaminated		Not Serviced	
	Service Exception	RESOVERL	Overloaded Cart		Not Serviced	
	Service Exception	ROBLOCKED	R0-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 an	d 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 NO	0° 5610P											
C 100	All v EQUIPA	All All	¥								Search	9 0 C
1D	SERVICECODE ID	CHARGECODE	ID	NOTE		DIVSION	COUNT	TYPE	NCS422	BCCHG	CPMATL	
1000	2 Yard Recycle Service			COMREC 2Y 1XW		1002	1	1.00	20	R1		
1001	2 Yard Recycle Service			COMREC 2Y 3XW		1002	1	1.00	20	83		
1002	2 Yard Recycle Service			RECYCLE 2Y 1XW		1002	1	1.00	28	ZW		
1003	2 Yard Recycle Service			RECYCLE 2Y 1XW		1002	1	1.00	27	R1		
1004	2 Yard Trash Service	Special Event	t Trip Charge	2Y BIN 1XW		1002	1	1.00	2Y	TW		
1005	2 Yard Trash Service			2Y BIN 2XW		1002	1	1.00	29	210		
1005	2 Yard Trash Service			2Y 8IN 3XW		1002	1	1.00	24	3X		
1007	4 Yard Recycle Service			COMREC 4Y 1XW		1002	1	1.00	4C	81		
1008	4 Yard Recycle Service			COMREC 4Y 2XW		1002	1	1.00	4C	82		
1009	4 Yard Recycle Service	UPDATE SERVICE				•	1	1.00	4Y	1W		
1010	4 Yard Recycle Service						1	1.00	4Y	R1		
1011	4 Yard Recycle Service	10	1004				1	1.00	4Y	82		
1013	4 Yard Trash Service	_					1	1.00	4Y	ZW		
1014	4 Yard Trash Service	SERVICIONED	2 Yard Trash Service -	CHARGECODE ID	Special Event Trip Charge	-h	1	1.00	4Y	81		
1015	4 Yard Trash Service	in the court		Charactobeld	storeter up carge -	1	1	1.00	4Y	82		
1016	4 Yard Trash Service				Relocate		1	1.00	4Y	83		
1017	6 Yard Recycle Service	NOTE	21 BIN LAW	COUNT	Rental Fee		1	1.00	6C	R1		
1018	6 Yard Recycle Service				Roll Off 30 Day Inactivity Fee		1	1.00	60	82		
1019	6 Yard Recycle Service	DIVISION	1002 0	TYPE	Roll-off Hourly		1	1.00	6Y	1X		
1020	6 Yard Recycle Service	_			Special Event 250g Holding Tank		1	1.00	6Y	R1		
1021	6 Yard Recycle Service	BCSIZE	24	BCO16	Special Event Delivery Fee		1	1.00	6Y	82		
1022	6 Yard Recycle Service	_			Special Event Handicap Unit		1	1.00	BY	R1		
1023	6 Yard Trash Service	CPMATL			Special Event Service		1	1.00	6Y	1W		
1024	6 Yard Trash Service				Special Event Standard Unit		1	1.00	6Y	2W		
1025	6 Yard Trash Service				Special Event Trailor		1	1.00	6Y	3W		
1026	6 Yard Trash Service				Special Event Trash Box Delivery		1	1.00	6Y	81		
1027	6 Yard Trash Service				Special Event Trip Charge		1	1.00	6Y	82		
1028	6 Yard Trash Service			6Y BIN 3XW			1	1.00	6Y	83		

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

Setup (Services) - Unearned Revenue GL Account Fleld 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					? 🛞
LOB ID	FEL_REC					
NAME	Front Load Recycle			ACTIVE No 👻		
Settings	Mobile / Optimiza	ation / Online	: Order			
SCREEN TYPE	E		1 -	ENABLE USED OIL COLLECTION	No 👻	
GL SEGMENT	r			ENABLE PROACTIVE ROUTE STATUS DRIVER CHECK	No 👻	
UNEARNED F	REVENUE GL ACCOUNT			ENABLE MANIFEST PROCESSING	No 👻	
WORK ORDE	WORK ORDER MINIMUM CHARGE CODE		-	ENABLE MANIFEST GROUP WEIGHT ROUNDING	No 👻	
OVER MAX V	OVER MAX WEIGHT CHARGE CODE		~	ENABLE ACTIVE DISPATCH	No 👻	
RENTAL CHA	RGE CODE		-	ENABLE CHARGE CODE WASTE CODES	No 👻	
LIMIT CHARG	SE CODE TO MATCHING E	QUIPMENT	No 👻	ENABLE WORK TYPE DEFAULT CHARGE CODES	No 👻	
LIMIT CHARG	SE CODE TO MATCHING N	IATERIAL	No 👻	ENABLE BIC REPORTING	No 👻	
INVOICE SUN	MMARY DESCRIPTION			ENABLE LABOR TRACKING	No 👻	
PRODUCTIVI	TY UNIT NAME					
Profitabilit	у					
ROUTE CA	LCULATION	((Time of fire	st service - time of last service) *	operating cost per hour) + disposal cost		-
WORK OR	DER CALCULATION	(Minutes (st	art time - end time) * operating	cost per minute) + disposal cost		-
						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.

UPDATE SERVICE CODE									26	3		
Service Code Surcharges	Divisions											
SERVICE CODE	RO12ASB		AC	TIVE		Yes			-			
NAME	12 Yard Asbestos Service		EN/	ABLE ROUTING		Yes			•			
LINE OF BUSINESS	Roll Off	•	REC	QUIRE FREQUENCY		Yes			•			
EQUIPMENT TYPE	12 Yard Roll Off	\otimes	EN	ABLE DRIVER UPDATE		No			•			
MATERIAL TYPE	Asbestos 👻	\otimes	EN	ABLE ACCOUNT SIGNAT	URE	No			-			
иом	Month	*	EN	ABLE DRIVER SIGNATUR	E	No			•			
TAXABLE	No 👻 CLASS	•	EN/	ABLE WORK ORDER		No			-			
GL ACCOUNT		•	EN	ABLE RENTAL FEE		Yes			•			
PRORATION METHOD	Calendar Days - Start and End	*	EN	ABLE DEFAULT DESTINA	TION	No			•			
BILL WHILE ON CREDIT HOLD	Yes	*	EN	ABLE NEGATIVE AMOUN	п	No			•			
IS AP TRANSACTION	No	•	EN	ABLE ESTIMATES TRACK	ING	Yes			-			
EST MONTHLY VOL UOM	Cubicyard	•	ENI	BL EQUIPMENT OWNER	SHIP	No	~		-			
IS SHELL	No	*	EN/	ABLE SHARE		No			•			
PRICING MODEL	None	-								_		
CALCULATE RATE PER YARD	Yes	EDIT	PROP	OSAL - 18153								8
		Set	ttings	Sapricas Histo	n/	Attachment	• M:	acter Agreement	Ectimated	live Actual		
CALCULATION METHOD	None	Set	ttings D QT	Services Histo	ry FREQU	Attachmen	t Ma IMATE TYPE	aster Agreement	Estimated	l vs Actual	BOOKED	BILLED C
CALCULATION METHOD	None Roll off Services	Set SITE ID (27363	ttings D QT 3 1.0	Services Histo Y SERVICE CODE 00 10 Yard CD Service	FREQU 2x pe	Attachmen JENCY ESTI rrweek per	t Ma IMATE TYPE month	aster Agreement EST REVENUE 150.00	Estimated EST ORDERS/UN	I vs Actual NITS UOM Month	BOOKED	BILLED C
CALCULATION METHOD	None Roll off Services 🗢	Set	ttings D QT 3 1.0	Services Histo Y SERVICE CODE 30 10 Yard CD Service	FREQU 2x pe	Attachmen JENCY ESTI r week per	t Ma IMATE TYPE 7 month	ester Agreement EST REVENUE 150.00	Estimated	I vs Actual	BOOKED	BILLED C
CALCULATION METHOD	None Roll off Services	SITE ID	ttings D QT 3 1.0	Services Histo Y SERVICE CODE 00 10 Yard CD Service	FREQU	Attachmenn JENCY ESTI r week per	t Ma IMATE TYPE 7 month	aster Agreement EST REVENUE 150.00	Estimated	I vs Actual	BOOKED	BILLED C
CALCULATION METHOD	None Roll off Services 🗢	Set	ttings > QT 3 1.0	Services Histo Y SERVICE CODE 30 10 Yard CD Service	FREQU 2x pe	Attachmenn JENCY ESTI r week per	t Ma IMATE TYPE r month	aster Agreement EST REVENUE 150.00	Estimated	IVS Actual	BOOKED	BILLED C
CALCULATION METHOD WORK TYPE EVENT CLASS	None Roll off Services	Set	ttings > QT 3 1.0	Services Histo Y SERVICE CODE 00 10 Yard CD Service	ry FREQU 2x pe	Attachment JENCY ESTI r week per	t Ma IMATE TYPE 7 month	est Revenue EST REVENUE 150.00	Estimated	IVS Actual	BOOKED	BILLED C
CALCULATION METHOD WORK TYPE EVENT CLASS	None Roll off Services 🗢	Set	ttings D QT 3 1.0	Services Histo Y SERVICE CODE 30 10 Yard CD Service	FREQU 2x pe	Attachment IENCY EST r week per	t Ma IMATE TYPE • month	ester Agreement EST REVENUE 150.00	Estimated	vs Actual NTS UOM Month	BOOKED	BILLED C
CALCULATION METHOD WORK TYPE EVENT CLASS	None Roll off Services	Set	ttings	Services Histo Y SERVICE CODE 00 10 Yard CD Service	FREQU 2x pe	Attachment VENCY EST r week per	t Ma IMATE TYPE r month	est Revenue 150.00	Estimated EST ORDERS/UN	vs Actual NTS UOM Month	BOOKED	BILLED C
CALCULATION METHOD WORK TYPE EVENT CLASS	None Roll off Services	Set	ttings > QT 3 1.0	Services Histo Y SERVICE CODE 30 10 Yard CD Service	rry FREQL 2x pe	Attachment IENCY EST r week per	t Ma IMATE TYPE or month	ester Agreement EST REVENUE 150.00	Estimated	IVS Actual	BOOKED	BILLED C
CALCULATION METHOD WORK TYPE EVENT CLASS	None Roll off Services	Set	ttings	Services Histo Y SERVICE CODE 00 10 Yard CD Service	rry FREQL 2x pe	Attachmen IERCY ESTE Ir week per	t Ma MATE TYPE r month	EST REVENUE 150.00	Estimated	vs Actual	BOOKED	BILLED C
CALCULATION METHOD WORK TYPE EVENT CLASS	None Roll off Services	Set 27363	ttings	Services Histo Y SERVICE CODE 30 10 Yard CD Service	rry FREQL 2x pe	Attachmen JENCY EST Ir week per	t Ma IMATE TYPE • month	estr Agreement EST REVENUE 150.00	Estimated	IVS Actual	BOOKED	BILLED C
CALCULATION METHOD WORK TYPE EVENT CLASS	None Roll off Services	Sec 27363	ttlings	Services Histo Y SERVICE CODE 00 10 Yard CD Service	rry FREQL 2x pe	Attachmen IERCY EST I week per	t Ma IMATE TYPE • month	EST REVENUE 150.00	Estimated	vs Actual NTS UOM Month	BOOKED	BILLED C
CALCULATION METHOD WORK TYPE EVENT CLASS	None Roll off Services	See 1	ttings	Services Histo Y SERVICE CODE 00 10 Yard CD Service	ry REQU 2x pe	Attachmen JENCY EST Ir week per	t Ma IMATE TYPE month	EST REVENUE 150.00	Estimated	vs Actual	BOOKED	BILLED C
CALCULATION METHOD WORK TYPE EVENT CLASS	None Roll off Services	Stell	ttings	Services Histo Y SERVICE CODE 10 Yard CD Service	rry FREQU 2x pe	Attachmen IERCY EST Ir week per	t Ma IMATE TYPE • month	EST REVENUE 150.00	Estimated	vs Actual NTS UOM Month	BOOKED	BILLED C
CALCULATION METHOD WORK TYPE EVENT CLASS	None Roll off Services	See 1 27363	ttings	Services Histo Y SERVICE CODE 00 10 Yard CD Service	FREQU Zx pe	Attachmen' JENCY EST r week per	t Mai	ster Agreement EST REVENUE 150.00	Estimated	vs Actual NTS UOM Month	BOOKED	BILLED C
CALCULATION METHOD WORK TYPE EVENT CLASS	None Roll off Services	Stelio (27363	ttings	Services Histor Y SERVICE CODE 10 Yard CD Service	FX FREQU	Attachmen IERCY EST Ir week per	t Ma	est Agreement EST REVENUE 150.00	Estimated	vs Actual NTS UOM Month	BOOKED	BILLED C

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.

PROPOSAL FORM TYPE SETUP										
•										0
10	NAME	FORM TYPE	REASON CODE	D RINTAN, TIPE	IS TEMP	PRE-AUTHORIZATION	APPROVAL	CHECK LET TYPE	ACTVE	
1	New Service	Proposal	Add Sic - New Service	No	No	Not Required	Required		Active	
11	New Service	Service Contract	Add Sic - New Service	No	No	Not Required Page 1	view required prior to Approval		Adive	
21	New Service	Services Change Form	Add Sic - New Service	No	No	Not Required Ro	view required prior to Approval		Adive	
36	Chg Svo Price Decrease	Proposal	Chg - Price Decrease	Yes	No	Not Required	Required		Adive	
48	Chg Svo Price Decrease	Service Contract	Chg - Price Decrease	704	No	Not Required	Required		Adive	
60	Chg Svo Price Decrease	Service: Change Ferm	Chg - Price Decrease	704	No	Not Required	Required		Adive	
28	Chg two Price Increase	Proposal	Chg - Price Increase	704	No	Not Required	Required		Adive	
79	Chg two Price Increase	Service Contract	Chg - Price Increase	765	No	Not Required	Required		Adive	
80	Chg two Price Increase	Services Change Form	Chg - Price Increase	Nes	No	Not Required	Required		Adive	
81	Chg Svi: Service Decrease	Proposal	Chg - Service Decrease	Nes	No	Not Required	Required		Active	
82	Chg Svt Service Increase	Proposal	Chg - Service Increase	Yes	Ne	Not Required	Required		Active	
63	Chg Svt Service Increase	Service Contract	Chg - Service Increase	Yes	No	Not Required	Required		Active	
64	Chg Svt Service Decreace	Service Contract	Chg - Service Decrease	Yes	No	Not Required	Required		Active	
65	Chg Svt Service Decrease	Services Change Form	Chg - Service Decrease	Yes	No	Not Required	Required		Active	
66	Chg Svo Service Increase	Services Change Form	Chg - Service Increase	Yes	No	Not Required	Required		Active	
62	End Sec End Sec	Services Change Ferm	End - End Service	Yes	No	Not Required	Required		Adive	
68	Add-Change is LOB/Equipment	Proposal	Add-Change in LOB/Equi	No	No	Not Required Ro	view required prior to Approval		Inactive	
89	New Business Acquistion	Proposal	New Business Acquisition	No	No	Not Required Ro	view required prior to Approval		Adive	
90	New Business From Competitor	Proposal	New Business Fram Com	No	No	Not Required Ro	view required prior to Approval		Adive	
91	New Business New Owner	Proposal	New Business New Owner	70	No	Not Required Po	view required prior to Approval		Adive	
92	New Business Temp	Proposal	New Business Temp	70	Tes	Not Required 75	view required prior to Approval		Adive	
95	New Customer	Proposal	New Business	70	No	Not Required 75	view required prior to Approval		Active	
94	Reirelate Bad Dekt Cust	Proposal	Reinstate Bad Debt Cust	No	No	Not Required Re	view required prior to Approval		Active	
95	Chg Contract Renewal	Proposal	Chg Contract Renewal	Nes	No	Not Required	Required		Active	
95	Chg Pl Roll Back	Proposal	Chg-Pl Roll Back	Nes	No	Not Required	Required		Active	
97	Chg-Price Match	Proposal	Chg-Price Match	Yes	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.

IVISION SETUP						
	~					
Details Credit Card / ACH Pro	cessing Cost / Target Pricing					
DIVISION ID	1002					
NAME	CORPLIS					
l egal Address		Bill Remit Address				
NAME QA WASTE SERVICES		NAME	QA WASTE SERV	ICES - CORPUS		
ADDRESS LINE 1	PO BOX 260119	ADDRESS LINE 1	PO BOX 260119			
ADDRESS LINE 2		ADDRESS LINE 2				
CITY	Corpus Christi	CITY	Corpus Christi			
STATE	TX POSTAL CODE 78426	STATE	ТХ	POSTAL CODE 78426		
MAIN PHONE	• (361) 289-5588	AUTO PROCESS SERVICE CHANGES	Active Service			
TOLL FREE PHONE	(800) 555-6513	ENABLE INTEGRATION	None			
FAX		LOCKBOX IMPORT FORMAT	Format3			
EMAIL		LOCKBOX NON-MATCHING ACCOUNT	31847	4		
TIME ZONE	Central Standard Time 👻	ACCOUNT PORTAL URL	navuqa-customerportal.navusoft.net			
SERVICE NOTIFICATION FROM EMAIL	svc@navusoft.com	ACCOUNT PORTAL PAST DUE TEXT				
DIVISION GROUP	- 🛛	MAILCHIMP API KEY				
EPA ID	FRONTIER K2, LLC FEIN 81-5137248	MAILCHIMP LIST ID				
GL SEGMENT	L300	SMS TASK DEFAULT USER				
EXTERNAL DB ID	COR	RO DISPOSAL REV %	0.00			
NOTE		ACCOUNT CUSTOM SETTINGS CLASS				
		SITE CUSTOM SETTINGS CLASS				
LOGO URL	Select Image BROWSE					
	View					

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 N	OTIFICATION TEMPLATE			?	8
TYPE	Vendor Service Change Notification	Ŧ	NAME ACTIVE Yes 👻		
RESPOR	Operations Notification Order Form Other				
DEFAU	Past Due Notification Payment Receipt		CONTENT TYPE text/html 👻		
DEFAU	Payment Receipt (Credit Card / ACH) Proposal		PREVIEW Search	Q	
	Proposal / Service Agreement Service Notification / Reminder Site Notification		change.id change.type		
	Vendor Service Change Notification Vendor Work Order Notification		login.usr.email login.usr.name login.usr.title		_
			new.equipmenttype.name new.frequency		
			new.materialtype.name new.quantity		
			new.servicedescription new.vendorrate		
			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.

NOTIFIC	ATION TEMPLATE SETUP										
0	TYPE All v										0
ID	NAME	DEFAULT SUBJECT	TYPE		CONTENT TYPE	CREATED BY	SURVEY TYPE	RESPONSE REQUEST TYPE	ACTIVE	PREVIEW	PREVIEW
1	Proposal	Proposal-Please Sign Orion Waste Service Agreement	Proposal		text/html	Lori Sheldt			Yes	Preview	
2	Proposal/Gvc Agreement	Orion Waste Solutions Proposal \ Svc Agreement	Proposal / Service Agree	ment	text/html	Lori Sheldt			Yes	Preview	
50	Portal Invite	Portal Invitation	Account Portal Notificat	ion	text/html	Lori Sheldt			Yes	Preview	
51	Other	Other \ Thank you from Orion Waste Solutions	Other		text/html	Lori Sheldt			Yes	Preview	
52	Proposal \ Svc Agreement	Proposal \ Svc Agreement Follow Up	Proposal / Service Agree	ment	text/html	Lori Sheldt			Yes	Preview	
53	Contact Form	Contact Form - Orion Waste Solutions Introduction	Contact Form		text/html	Lori Sheldt			Yes	Preview	•
54	Invoice	Bobcat Disposal of Sarasota, LLC Invoice	Invoice		textfitted	Lori Sheldt			Yes	Preview	
55	Statement	Orion Waste Solutions Statement	Account Statement	EDIT NOTIFICATION TEMPLATE				2 😣	Yes	Preview	
56	Portal invite	Navusoft Intro Letter	Account Portal Notificat						Yes	Preview	•
57	Invoice	Invoice - New Software Introduction	Invoice	TYPE Account Portal Notification	Ŧ	NAME Portal Invite	ACTIVE Yes -		Yes	Preview	•
58	Invoice Link	Orion Waste Solutions Invoice #@@invoiceId;; - Link	Invoice						Yes	Preview	
59	Invoice Attachment	Orion Waste Solutions Invoice #@@invoiceId;; - Enclosed	Invoice	RESPONSE MEQUEST TIPE					Yes	Preview	
60	*Current Acct	*Please Pay Your Current Bill*	Past Due Notification	Email Design Text Message	Design				Yes	Preview	
61	**Past Due Account	**Your Account May Be Past Due**	Past Due Notification						Yes	Preview	
62	****Suspend Account	****Your Account is Seriously Past Due!****	Past Due Notification	DEFAULT SUBJECT Portal Invitation			CONTENT TYPE text/html ~		Yes	Preview	
63	Payment Receipt	Payment Receipt from Orion Waste Solutions	Payment Receipt	DEFAULT MESSAGE		PREVIEW	KEY PATHS di	ivision Q (2)	Yes	Preview	•
				Follow this link to the payment ports	L@€division.pey	ementperstalut;	division addressine 1 division addressine 2 division (ny division kapiname division kapiname division kapiname division kapinameter talur division kapin	4			
						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		? 😣
ТҮРЕ	Add	v
ID	IAC	
NAME	New Name	
EXTERNAL ID		
SALES RESULTS REPORT TYPE	New	~
IS NEW OWNER	No	~
IS OLD OWNER	No	~
APPLY 1085 RULE	No	v
EXCLUDE FROM 1085	No	Ŧ
EXCLUDE FROM COMMISSION	No	Ŧ
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.

🔁 TYPE All 👻	•			0
TYPE †	REASON CODE	NAME	6LACCOUNT	WO NEW STATUS
Add	ADDNEWCUS	ADD-New Customer	Cash	
Add	IAC	New Name		
Add	ICO	ADD-New Bus due to New Owner		
Add	IFC	ADD-New Bus From Competitor		
Add	IMP	ADD- Conversion		
Add	IMR	ADD-Reinstate bad pay customer		
Add	INB	ADD-New Business - Green Field		
Add	INR	ADD-New Business - Recycling		
Add	ISA	ADD-Seasonal Add Service		
Add	151	ADD-Increase in Service		
Add	ITA	ADD-Temporary Add Service		
Add	NSS	ADD-New Service Site		
Add	SYSTEM_ADD	ADD-Add Svc by System		
Update	AM	CHG-Automated Price Increase		
Update	CHG_CORR	CHG-Charge Correction		
Update	CHG_PD	CHG-Price Decrease		
Update	CHG_PI	CHG-Price Increase		
Update	CHG_SVCDEC	CHG-Service Decrease		
Update	CHG_SVONC	CHG-Service Increase		
Update	CMC	CHG-Price roll back-competitor		
Update	CPI	CHG-Price increase roll back		
Update	P	CHG-Individual Price Increase		
Update	ITD	CHG-Temporary Dec in Service		
Update	m	CHG-Temporary Incr in Service		
Update	NDS	CHG-Decrease in Service		BALANCE WRITE OFF
Update	REN	CHG-Contract renewal		
Update	SVC	CHG-Charge in line of Business		REASON CODE
End	CDT	END-Company driven Termination		
End	crc	END-Lost to Competition		STATUS Bad Debt
				NOTE
				The second

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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.

		C
CUSTOM TEXT1	CUSTOM TEXT2	
Custom Text Field Test 1	Custom Text Field Test 2	

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	CORPUS 👻	EMAIL FROM						
ACCOUNT CLASS	- ©	NOTIFICATION TEMPLATE		-				
BILL GROUP	- 🛇							
ACCOUNT SOURCE	- × (8)							
SITE SOURCE	• 🛞	Total Count 5	Active Services Count	Portal Invite Accepted	Invite Acceptance Pending <u>1</u>	Portal Invite Not Sent <u>1</u>		
Accounts	with Active Services							
Accounts	with Balance Due							
Restrict t	o Billing Contacts							
Accounts	without Automatic Payment							
For new & ur No notificati	nactivated contacts, a new temporary pas ons will be sent to contacts that have alre	sword will be generated and eady accepted an invitation.	sent to the contact.					
							LOAD	SEND FMAIL

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 TOTA	L DUE	\$ 161.25	PAST DUE					•
		Su	Ibmit Payment Today to Avoid S	uspension of all Services					
REFERE	DUE	AMOUNT	BALANCE	PAYMENT	\$ 16	1.25 тота	L DUE	\$ 161.25	PAST DUE
803507	11/24/22	\$ 161.25	\$ 161.25	\$ 161.25 🕑				Submit Payment Today to Avoid	Suspension of all Services
		Pre-Pa	yment Amount		REFERE	DUE	AMOUNT	BALANCE	PAYMENT
Note		Payme	nt Total	\$ 166.20	803507	11/24/22	\$ 161.25	\$ 161.25	\$ 161.25 (
							Pre-Pa	ayment Amount	
	Туре		•				Credi	t Card Fee	\$ 4.9
	Name				Note		Paym	ent Total	\$ 166.2
	Confirmation Email	ı				Туре	Credit Ca	ard 🔻]
		Make A Paym	lent			Name			
						Card Number			
				Back to Login		Month	*	Year 🔻	
						Zip Code		CCV	
						Confirmation Email			
							Make A Payı	ment	
									Back to Lo

Pathway: Portal; Make a Payment