

# Release Version 68 [Archive]

Last Modified on 05/07/2026 11:43 am PDT



The release notes in this article correspond to version 68. Screens and logic may have changed in newer versions.

## Home Screen

### Recent Activity - Timestamp Updated To Display Correct Time (14743)

An issue was found that caused the timestamp in Recent Activities to display the wrong time. This has been fixed to use the user's current time.

RECENT ACTIVITY				
ACTIVITIES		Alerts	Activities	Views
Fri 02/24/23				
8:30 am to 1:37 pm	0 Alerts	0 Activities	2 Views	
1:37 pm	Site Viewed	<a href="#">Example Account 1</a>		
8:30 am	Site Viewed	<a href="#">Example Account 2</a>		
Wed 02/22/23				
7:57 am to 12:04 pm	0 Alerts	0 Activities	3 Views	
12:04 pm	Site Viewed	<a href="#">Navusoft - Demo</a>		
7:59 am	Site Viewed	<a href="#">Example Account 2</a>		
7:57 am	Site Viewed	<a href="#">Example Account 3</a>		
Tue 02/21/23				
8:07 am to 11:55 am	0 Alerts	0 Activities	3 Views	
11:55 am	Site Viewed	<a href="#">Navusoft - Demo</a>		
8:27 am	Site Viewed	<a href="#">Example Account 4</a>		
8:07 am	Site Viewed	<a href="#">Example Account 3</a>		
Mon 02/20/23				
1:38 pm to 1:41 pm	0 Alerts	0 Activities	2 Views	

Pathway: Home Screen > Recent Activity Icon; Activities Column

### Alert Notifications - Timestamp Logic Updated to use Timezone in Setup (14867)

Timestamp logic has been updated to alert popups to use the timezone indicated in Setup > System > System Options.

Pathway: Home Screen > Alert Notification (popups)

## Accounts

### Accounts - Unread Email Management Screen Not Allowing Scroll Down (14464)

An issue has been resolved that prevented users from being able to scroll down on the Unread Email Management screen.

DATE ↓	TYPE	AMOUNT	BALANCE	ACCOUNT	FROM	TO	SUBJECT
07/26/22 9:16 am	Invoice	180.50	144.00				DumpIT Invoice 59357
07/25/22 11:43 am	Invoice	23.00	23.00				DumpIT Invoice 74511
07/25/22 11:15 am	Invoice	186.97	186.97				DumpIT Invoice 67214
07/20/22 5:01 pm	Invoice	237.00	0.00				DumpIT Invoice 74507
07/20/22 5:01 pm	Invoice	231.00	231.00				DumpIT Invoice 74505
07/20/22 5:01 pm	Invoice	165.00	165.00				DumpIT Invoice 74506
07/20/22 5:01 pm	Invoice	165.00	0.00				DumpIT Invoice 74500
07/20/22 5:01 pm	Invoice	165.00	165.00				DumpIT Invoice 74501
07/20/22 5:01 pm	Invoice	165.00	0.00				DumpIT Invoice 74502
07/20/22 5:01 pm	Invoice	165.00	0.00				DumpIT Invoice 74503
07/20/22 5:01 pm	Invoice	297.00	0.00				DumpIT Invoice 74495
07/20/22 5:01 pm	Invoice	165.00	0.00				DumpIT Invoice 74492
07/20/22 5:01 pm	Invoice	165.00	165.00				DumpIT Invoice 74494
07/20/22 5:01 pm	Invoice	231.00	0.00				DumpIT Invoice 74486
07/20/22 5:01 pm	Invoice	165.00	0.00				DumpIT Invoice 74487
07/20/22 5:01 pm	Invoice	165.00	165.00				DumpIT Invoice 74488
07/20/22 5:01 pm	Invoice	165.00	165.00				DumpIT Invoice 74490
07/20/22 5:01 pm	Invoice	165.00	0.00				DumpIT Invoice 74485
07/20/22 5:01 pm	Invoice	165.00	165.00				DumpIT Invoice 74478
07/20/22 5:01 pm	Invoice	165.00	165.00				DumpIT Invoice 74479

Pathway: Accounts > Unread Email Management

### AR History - Option to Email Credit Memo Available (14782)[Enhancement]

Email has been added to the right click options for Credit Memos. Notification Template setup is recommended but not required to use this feature.

- If no template is created, the Credit Memo will be attached to the email with a basic subject and the user who sent the memo will display as the 'Sent From'.
- If a template is created, subject and body content is populated with what was created in the template and 'Sent From' will populate with the Division's email. If an email does not exist it will use the sender's email address.
  - Templates are created in Setup > System > Notification Template - select 'Credit Memo' from Type drop down

AR HISTORY									
CURRENT	1-30 DAYS	31-60 DAYS	61-90 DAYS	91-120 DAYS	120+ DAYS	TOTAL			
93.58	0.00	0.00	0.00	0.00	0.00	93.58			
<input type="checkbox"/> Limit to open items   STATEMENT   INVOICE   AUTO APPLY   BALANCE WRITE OFF   PAYMENT METHODS (0)   Search									
DATE ↓	DUE DATE	PERIOD	SITE ID	TYPE	REFERENCE NO	AMOUNT	APPLIED AMOUNT	BALANCE	RUNNING SUM
02/20/23	2023-02			Credit Memo - Adjustment	845933	(50.00)	50.00	201.84	
02/15/23	2023-02			Credit Memo - Adjustment	845937		25.00	251.84	
02/02/23	02/22/23	2023-02		Invoice	845933		(50.00)	58.26	276.84
02/02/23	02/22/23	2023-02		Invoice	845932		(100.00)	35.32	168.58
02/02/23	2023-02			Credit Memo - Adjustment	845932	(100.00)	100.00	33.26	
01/06/23	01/26/23	2023-01		Invoice	845936	108.26	(108.26)	133.26	
11/14/22	12/04/22	2022-11		Invoice	845937	25.00	(25.00)	25.00	
11/11/22	2022-11			Payment - Check	6123	(1,399.99)	1,399.99	0.00	

Pathway: Accounts > Account (Customer Service Screen) > AR History

### Service Records -Default Charge Code Rate Not Displaying on Work Orders (14803)

Previously, when a charge code with a default rate was added to a work order, the default rate was not applied. This has been fixed.

**AVAILABLE CHARGE CODE SETUP** SETUP > SERVICES > AVAILABLE CHARGE CODE

LINE OF BUSINESS: Commercial | DIVISION: | SERVICE REGION: | Search: [ ]

CHARGE CODE	MATERIAL TYPE	EQUIPMENT TYPE	UOM	DEFAULT RATE	
Bulk Pickup	MSW		Service	\$2.00	-
Adjustment-Commercial			Unit	0.00	+
				0.00	+
				0.00	+
				0.00	+
				0.00	+
				0.00	+
				0.00	+
				0.00	+
				0.00	+
				0.00	+
				0.00	+

**EDIT SERVICE RECORD**

Example Account  
1234 5th Ave  
DAYTON, TX 77535

CREATED BY: David Navarro on 12/16/22 3:00 am

ORDER REASON: [ ]

ACCESS: TUESDAY, 6-YARDER

WORK ORDER: 5238686 | QTY: 1 | SERVICE CODE: 6 Yard Trash Service | EQUIPMENT: 6YD | WORK TYPE: FL\_SERVICE | ORDER TYPE: Scheduled Service | MATERIAL: MSW

ORDER NOTES: [ ]

PO NUMBER: [ ] | EXTERNAL ID: [ ]

SCHEDULED DATE: 01/30/23 Monday | ROUTE: DAY 203 | SEQUENCE: 150 | DESTINATION / ORIGIN: [ ]

WORK STATUS: Scheduled | EXCEPTION REASON: [ ] | POSTING STATUS: Pending

Completion Data | **Charges** | Attachments | Labels | Photos

Charges must match Equipment |  Charges must match Material | WO MINIMUM: [ ] | **CALCULATE QTY AND DISCOUNT**

GROSS QTY	LABELS	NO CHARGE QTY	CHARGE QTY	UOM	CHARGE CODE	PER UNIT	VENDOR RATE	MINIMUM TYPE	MINIMUM	TOTAL	
0		0	0	Service	Bulk Pickup	\$ 52.00		None		\$ 0.00	-

Pathway: Accounts > Search Work Order; Setup > Services > Available Charge Code

### Service Record - Charges Tab Relocated (14865)[Enhancement]

The Charges tab on the Service Record has been moved to the first position in the Service Detail tab set.

**EDIT SERVICE RECORD** ? X

Example Account  
1234 5th Ave  
CLEVELAND, TX 77327

CREATED BY: Aliena Somers on 2/22/23 11:33 am

ORDER REASON: [ ]

ACCESS !!!WATCH OUT FOR THE DUMPSTE LID!!!  
6 YD, MONDAY ONLY, @ END

WORK ORDER: 5647841 | QTY: 1 | SERVICE CODE: 6 Yard Trash Service | EQUIPMENT: 6YD-RL | WORK TYPE: RS\_DELIVER | ORDER TYPE: On Call | MATERIAL: MSW

ORDER NOTES: [ ]

PO NUMBER: [ ] | EXTERNAL ID: [ ]

SCHEDULED DATE: 02/24/23 Friday | ROUTE: [ ] | SEQUENCE: 0 | DESTINATION / ORIGIN: [ ]

WORK STATUS: Scheduled | EXCEPTION REASON: [ ] | POSTING STATUS: Pending

**Charges** | Completion Data | Attachments | Labels | Photos

Charges must match Equipment |  Charges must match Material | WO MINIMUM: [ ] | **CALCULATE QTY AND DISCOUNT**

GROSS QTY	LABELS	NO CHARGE QTY	CHARGE QTY	UOM	CHARGE CODE	PER UNIT	VENDOR RATE	MINIMUM TYPE	MINIMUM	TOTAL	
1			1	Service	Bulk Pickup	\$ 0.00		None		\$ 0.00	-

Pathway: Accounts > Search > Work Order

### Service Record - Logic Updated to Voided Labels for Manifest Consolidation Transfer Batches (14886)

Void logic has been updated to labels assigned to a Manifest Consolidation Batch:

1. A label can not be voided if:
  - o Batch is Posted
  - o Batch is Shipped
  - o Batch is Ready to Ship
2. If the Manifest Consolidation Batch is Open:
  - o The label can be voided and will be removed from Service Record's Label tab

EDIT SERVICE RECORD
?
✕

<p><b>Example Account</b> 1234 5th Ave addr 2 West Chester, OH 45069-1901 EPA: EPA1234 / State: ST1234 PHONE +1 555-555-1234</p> <p><b>CREATED BY</b> Lori Sheldt on 2/1/23 4:20 pm</p> <p><b>ORDER REASON</b> <input type="text"/></p> <p><b>ACCESS</b> The Access Info on the Site. Going to make this note a bit longer so we can see how both of these are going to fit on the report.</p>	<table border="0" style="width: 100%;"> <tr> <td><b>WORK ORDER</b></td> <td><b>QTY</b></td> <td><b>SERVICE CODE</b></td> <td><b>WORK TYPE</b></td> <td><b>ORDER TYPE</b></td> </tr> <tr> <td>5547640</td> <td>1</td> <td>Regulated Medical Waste Service</td> <td>RMW_SVC</td> <td>Scheduled Service</td> </tr> </table> <p><b>ORDER NOTES</b> <input style="width: 100%;" type="text"/></p> <table border="0" style="width: 100%;"> <tr> <td><b>PO NUMBER</b></td> <td><b>EXTERNAL ID</b></td> <td><b>CONSOLIDATION BATCH</b></td> </tr> <tr> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> </tr> </table> <table border="0" style="width: 100%;"> <tr> <td><b>SCHEDULED DATE</b></td> <td><b>ROUTE</b></td> <td><b>SEQUENCE</b></td> <td><b>DESTINATION / ORIGIN</b></td> </tr> <tr> <td>02/22/23 Wednesday</td> <td>DAY-601</td> <td>0</td> <td><input type="text"/></td> </tr> </table> <table border="0" style="width: 100%;"> <tr> <td><b>WORK STATUS</b></td> <td><b>EXCEPTION REASON</b></td> <td><b>POSTING STATUS</b></td> </tr> <tr> <td>Scheduled</td> <td><input type="text"/></td> <td>Pending</td> </tr> </table>	<b>WORK ORDER</b>	<b>QTY</b>	<b>SERVICE CODE</b>	<b>WORK TYPE</b>	<b>ORDER TYPE</b>	5547640	1	Regulated Medical Waste Service	RMW_SVC	Scheduled Service	<b>PO NUMBER</b>	<b>EXTERNAL ID</b>	<b>CONSOLIDATION BATCH</b>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<b>SCHEDULED DATE</b>	<b>ROUTE</b>	<b>SEQUENCE</b>	<b>DESTINATION / ORIGIN</b>	02/22/23 Wednesday	DAY-601	0	<input type="text"/>	<b>WORK STATUS</b>	<b>EXCEPTION REASON</b>	<b>POSTING STATUS</b>	Scheduled	<input type="text"/>	Pending
<b>WORK ORDER</b>	<b>QTY</b>	<b>SERVICE CODE</b>	<b>WORK TYPE</b>	<b>ORDER TYPE</b>																											
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<input type="text"/>	<input type="text"/>	<input type="text"/>																													
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02/22/23 Wednesday	DAY-601	0	<input type="text"/>																												
<b>WORK STATUS</b>	<b>EXCEPTION REASON</b>	<b>POSTING STATUS</b>																													
Scheduled	<input type="text"/>	Pending																													

Charges 3

Completion Data

Attachments

Labels (2)

Photos

GROUP <input checked="" type="checkbox"/>	TOTAL WEIGHT <input type="text"/>	MINUS EQUIPMENT DEDUCTION <input type="text"/>	<b>ASSIGN GROUP WEIGHT</b>	HIDE SCANNED LABELS <input type="checkbox"/>
-------------------------------------------	-----------------------------------	------------------------------------------------	----------------------------	----------------------------------------------

☐ LABEL	CHARGE CODE	EQUIPMENT TYPE	TARE WEIGHT	GROSS WEIGHT	NET WEIGHT	MANUAL WEIGHT	SCAN LOCATION	CONSOLIDATION			
								BATCH 1	BATCH 2	BATCH 3	
☐ 5547640-84170...	30 Gal Box Per ...			33	33	M	QA Waste Tran...				<input type="button" value="+"/>
☐ 5547640-84170...	30 Gal Box Per ...			33	33	M	QA Waste Tran...	1003			<input type="button" value="+"/> <input style="border: 2px solid red;" type="button" value="−"/>

Pathway: Accounts > Search (Work Order)

### Service Record - Composition Tab Updated to Include Total (14928)[Enhancement]

The Composition tab has been updated to include a total below the Quantity column.

**EDIT SERVICE RECORD**

Smiths Car Cleaning  
1829 Sam Houston St  
Liberty, TX 77575-4742

CREATED BY  
Lori Sheldt on 3/21/23 1:42 pm

ORDER REASON

WORK ORDER: 5781183, QTY: 1, SERVICE CODE: Inbound load, WORK TYPE: INBOUNDLD, ORDER TYPE: Inbound

ORDER NOTES

PO NUMBER, EXTERNAL ID

SCHEDULED DATE: 03/22/23 Wednesday, RECEIVING LOCATION: CHAMBERS COUNTY LF

TRANSPORTER, TRANSPORT METHOD, BILL OF LADING

WORK STATUS: Scheduled, EXCEPTION REASON, POSTING STATUS: Pending

Charges, Source Location, Disposal / Ship, Payments, Completion Data, Attachments, Composition, Photos

MATERIAL	QUANTITY	UOM	NOTE
MSW	15.00	pound	
Trash	16.00	ton	
	31.00		

Pathway: Accounts > Search > Work Order

### Service Record - Fixes to Add Disposal / Shipment Screen (15043)

An issue has been resolved on the *Add Disposal / Shipment* screen that affected **Qty** and **Save** functionality. Additionally, the screen display has been corrected to open the Add Disposal / Ship record in a new window and not within the Disposal / Ship tab.

**EDIT SERVICE RECORD**

Example Account  
9050 Northpoint Dr  
Beach City, TX 77523-8311

CREATED BY  
Jane Doe on 3/22/23 10:28 am

WORK ORDER: 5781871, QTY: 1, SERVICE CODE: 10 Yard Open Top Service, EQUIPMENT: 10YDRO, WORK TYPE: RO\_DUMPRET, ORDER TYPE: On Call

ORDER NOTES

ORDER REASON

ACCESS

**ADD DISPOSAL / SHIPMENT**

START DATE: 03/22/23 Wed, START TIME: 12:00 AM, END DATE, END TIME, DESTINATION / ORIGIN: CEFE LF, TANK

TRANSPORT METHOD: Truck, TRUCK, VEHICLE ID, EXTERNAL TICKET #, STATUS: Completed

MATERIAL	WEIGHT IN	WEIGHT OUT	UOM	QTY	MIN QTY	DISPOSAL RATE	FEE 1	FEE 2	TOTAL COST
MSW			ton	2		22.7000	5.51	7.12	45.40

NOTES

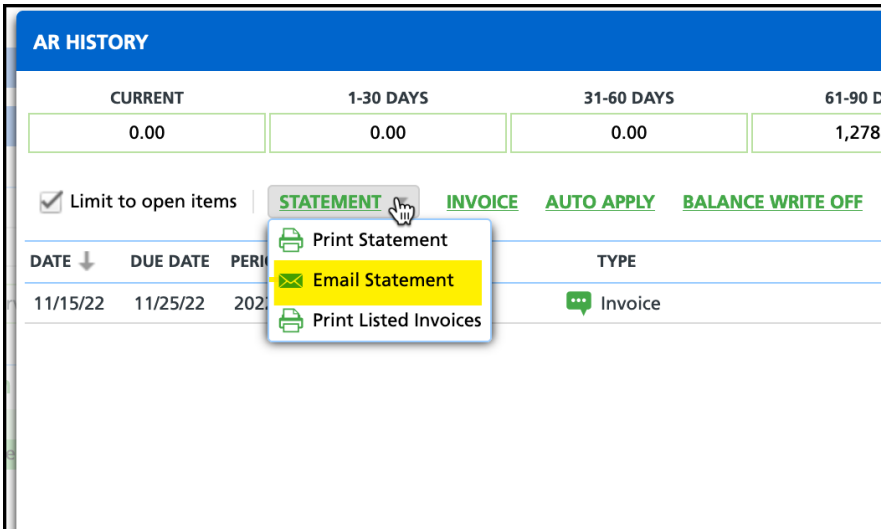
Ticket Image

Include Ticket Image With Invoice and make available in customer portal

Pathway: Accounts > Search > Work Order

### AR History - Link Not Opening for Emailed Statements (14786)

An issue has been resolved that prevented the link in the Email Statement from opening correctly by the recipient.

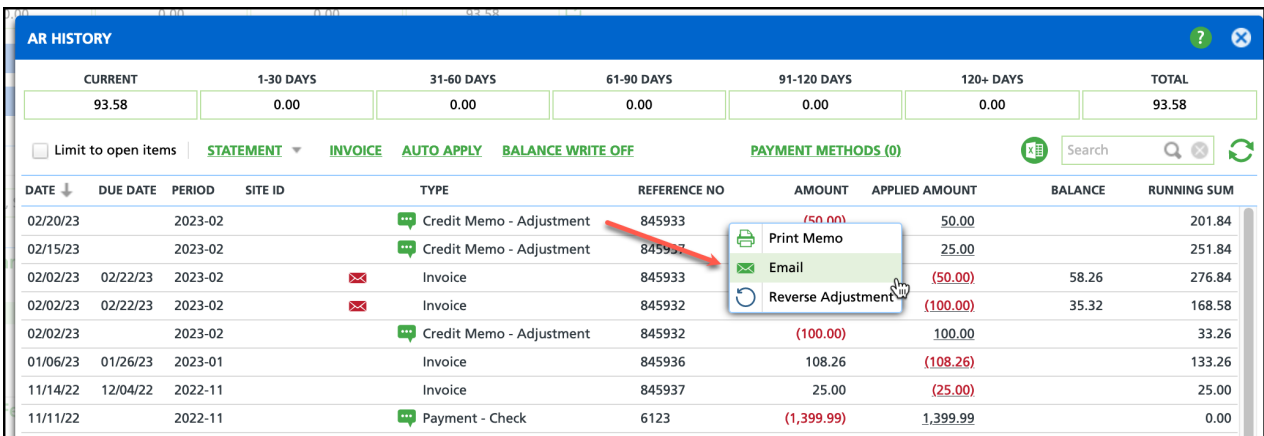


Pathway: Accounts > Account (Customer Service Screen) > AR History

### AR History - Option to Email Credit Memo Available (14782)[Enhancement]

Email has been added to the right click options for Credit Memos. Notification Template setup is recommended but not required to use this feature.

- If no template is created, the Credit Memo will be attached to the email with a basic subject and the user who sent the memo will display as the 'Sent From'.
- If a template is created, subject and body content is populated with what was created in the template and 'Sent From' will populate with the Division's email. If an email does not exist it will use the sender's email address.
  - Templates are created in *Setup > System > Notification Template* - select 'Credit Memo' from Type drop down



Pathway: Accounts > Account (Customer Service Screen) > AR History

### AR History - Print Memo Format Updated (14783)[Enhancement]

The following enhancements have been applied to the Print Memo format:

1. Column header formatting updated to all caps.
2. Total column renamed to 'Amount' and currency symbol added.
3. Currency symbol added to values displayed in the Total row.
4. Description column will include notes entered in the Note field of the Invoice Adjustment screen.



**QA Waste Services**  
PO BOX [REDACTED]  
Corpus Christi, TX 78426

**WAREHOUSE SERVICE**  
PO BOX [REDACTED]  
PEARLAND, TX 77584

**CREDIT MEMO** 10832  
**ACCOUNT** 43865  
**DATE** February 21, 2023

DATE	SITE ID	SITE NAME	WO #	INVOICE #	DESCRIPTION	AMOUNT
9/15/22	43865001	WAREHOUSE SERVICE 1605 N MAIN ST PEARLAND TX 77581	4713233	737625	Front Load 08YD Extra Pickup - this is note	-\$ 25.00
<b>TOTAL</b>						-\$ 25.00

Pathway: Accounts > Account (Customer Service Screen) > AR History

### AR History - Email Indicators Not Displaying Correctly (14900)

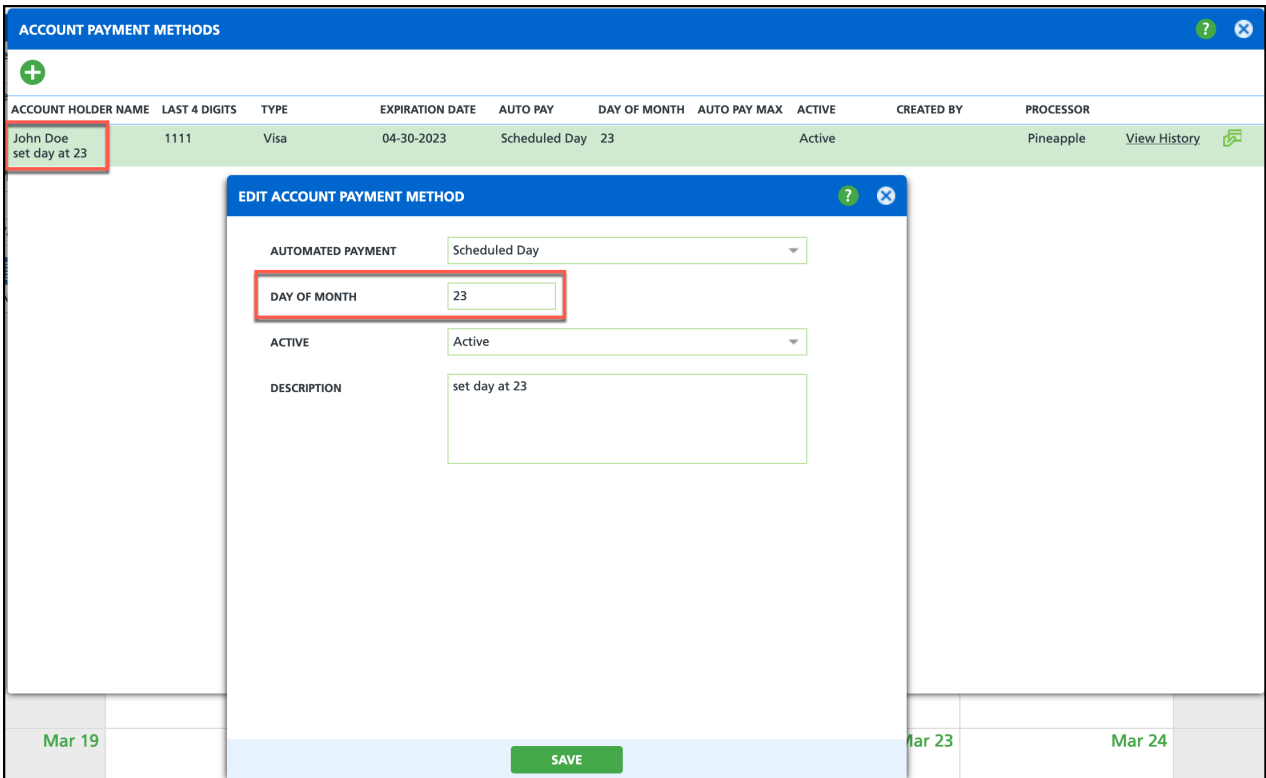
Previously, an issue prevented the email status indicators from displaying correctly on the account's AR History screen for sent and viewed emails. This has been fixed.

AR HISTORY										
CURRENT	1-30 DAYS	31-60 DAYS	61-90 DAYS	91-120 DAYS	120+ DAYS	TOTAL				
0.00	4,342.27	0.00	0.00	0.00	0.00	4,342.27				
<input checked="" type="checkbox"/> Limit to open items	STATEMENT	INVOICE	AUTO APPLY	BALANCE WRITE OFF	PAYMENT METHODS (0)	Search				
DATE	DUE DATE	PERIOD	SITE ID	TYPE	REFERENCE NO	AMOUNT	APPLIED AMOUNT	BALANCE		
02/02/23	02/22/23	2023-02		Invoice	845933	108.26	(50.00)	58.26		
02/02/23	02/22/23	2023-02		Invoice	845932	135.32	(100.00)	35.32		
01/31/23	02/20/23	2023-01		Invoice	844906	4,248.69		4,248.69		

Pathway: Accounts > Search > Accounts (Customer Service Screen) - AR History

### AR History - Autopay Setup Not Saving 'Day of Month' (14790)

An issue was reported that affected the 'Day of Month' from saving for accounts on autopay. Previously, upon saving the account's payment method (with an entry to the Day of Month field), the Day of Month field did not save. This has been fixed.



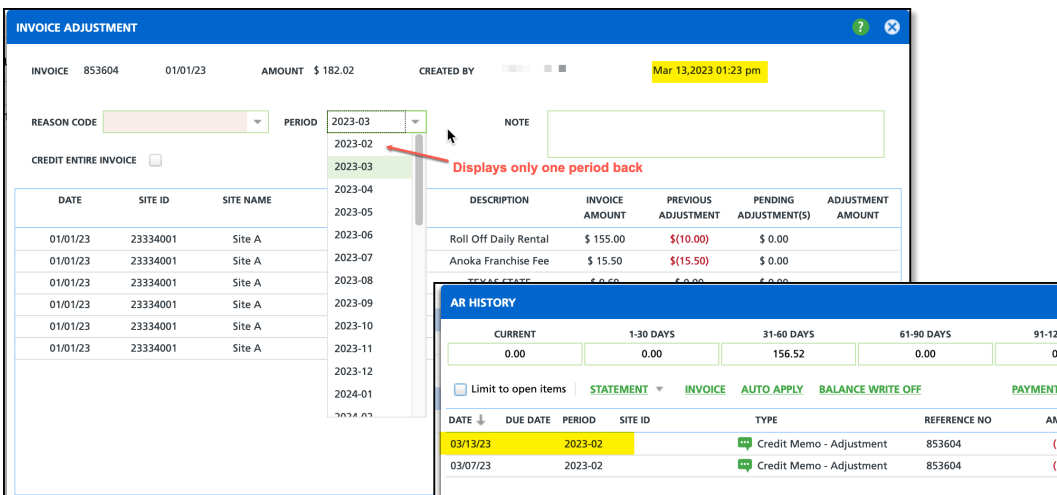
Pathway: Accounts > Search > AR History (Customer Service Screen)

### AR History - Logic Update to Period Selection (14891)[Enhancement]

Logic to the Period in the Invoice Adjustment screen has been updated to the following:

1. The Period selector defaults to the period matching today's date.
2. The Period selector will only display one period back if the period is still open.

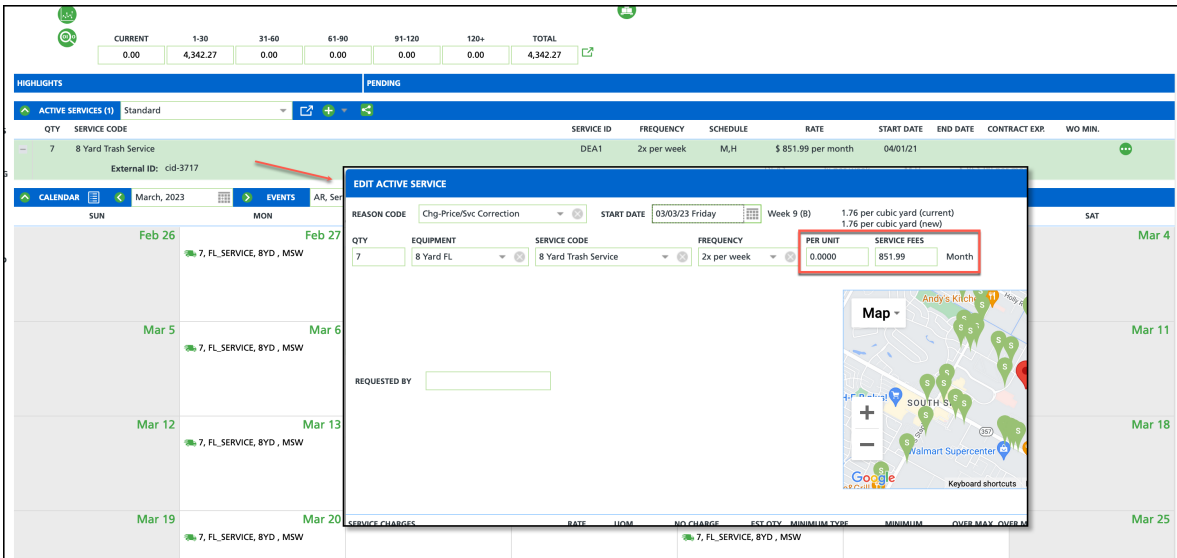
If an adjustment has been applied to an invoice (for the previous period), AR History will save the prior period and date it with the date of the adjustment.



Pathway: Accounts > Search > Account (customer service screen) > AR History

### Active Service - Edit Active Service Overwrites Current Rate (14884)

Logic has been updated to the rate fields in Edit Active Service to prevent the default rate from being applied if the Qty, Service Code or Frequency are **not** changed.

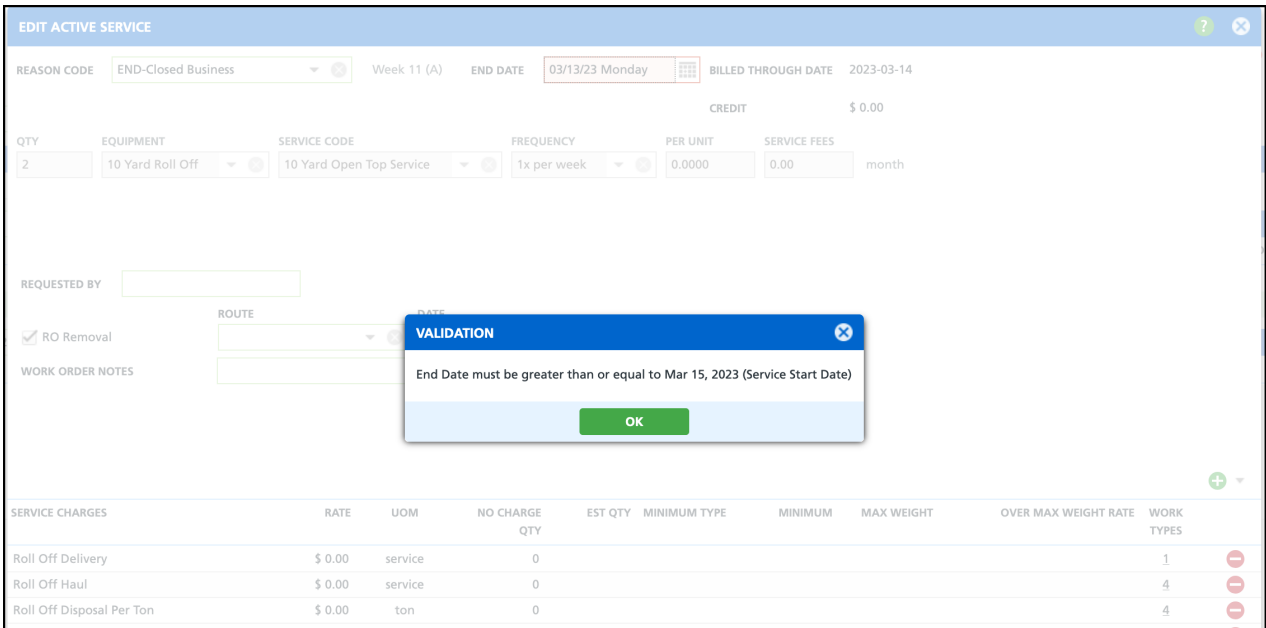


Pathway: Accounts > Search > Edit Active Service (Right Click)

### Active Services - Validation Popup Message Added For Invalid End Dates (14789)

When ending a service, a Validation popup will display if the end date entered does not match the following end date logic:

1. End Date is greater than or equal to the service's start date.
2. End Date is greater than or equal to the schedule date of the last completed work order.



Pathway: Accounts > Search > Account (Customer Service Screen) > Active Services (section)

### Work Order - Scanning Labels Logic Updated for Receipt Timestamp (14732)

Logic has been updated to the scanning labels receipt timestamp to pull from the local browser time.



30085004 **Example Account** Active

4 of 5 1234 5th Ave  
Beach City, TX 77523-8311

DAYTON DIVISION DAYTON

ald Carmen SERVICE REGION DAYTON OPEN MARKET

LL OFF-TEMP SALES REP John Doe

Y-ROLF BI-WEEKLY GENERATOR Not Applicable

Y-20096 **SURCHARGE GRP Fuel Surcharge - Roll Off**

ail with Attachment TAX REGION BAYTOWN CITY-CHAMBERS COU-HEALTH

20 TAX EXEMPT No

ald Carmen LEED REPORTABLE No

Applicable

**SURCHARGE WINDOW**

SURCHARGE	RATE / INDEX	TYPE
120+ Dayton Franchise Fee	10	%
0.00 Fuel Surcharge-Roll Off	18.21	%

Pathway: Accounts > Search > Customer Service Screen: Site (Section)

### Calendar - Timestamps for Site View Not Using Correct Time (14905)

Previously, the 'Last Viewed' time that displayed upon hovering over a user's name in the calendar did not match the timestamped time in Site Views. Logic has been updated to use the user's current time for the timestamp. The same logic was also extended to timestamps in Recent Activities.

Mar 16 St Pats 2023 Mar 17

(1) Laurie Smith  
(1) Alana Jones

**SITE VIEWS**

Last viewed at 8:26 AM

**Site Activity**

8:26 am (Today)	Alana Jones
8:17 am (Today)	Laurie Smith

Pathway: Accounts > Search > Account (Customer Service Screen)

## Max Weight Charge - Flat Rate (14772)[Enhancement]

The *Add/Edit Active Service* and *Add/Edit Service Proposal* screens have been updated to support an Over Max flat rate charge. To support this, the following changes were made:

1. *Over Max Type* column was removed
2. *Over Max Weight* was renamed to *Max Weight*
3. *Over Max Weight Rate* was adjusted to display the rate and the over max type.
  - o Examples:
    - Flat rates will display the amount followed by flat - \$10.00 flat
    - Per Unit rates will display the amount followed by the UOM used - \$5.00 / ton



For a flat rate to apply, the charge code must setup to reflect the flat rate preference. This is done in *Setup > Services > Charge Code > Enable Max Weight Charge (Field) - 'Yes - Flat Charge'*

Once the charge code has been added to the service, enter its Max Weight and the Over Max Weight Rate in the Service Charges section.

SERVICE CHARGES	RATE	UOM	NO CHARGE QTY	EST QTY	MINIMUM TYPE	MINIMUM	MAX WEIGHT	OVER MAX WEIGHT RATE	WORK TYPES
30 Gal Bo...	\$ 0.00	unit	0				30	\$ 10.00 flat	⊞

Pathway: *Load Account > Add/Edit Active Service*

## Operations

### Hazardous Material Manifest Not Populating Data Correctly (14616)

The following corrections have been applied to the Hazardous Material Manifest:

1. Populate Work Order ID field
2. Prevent prepopulating of the Manifest Tracking Number

3. Populate the following Generator information fields:
  - a. Generator ID Number
  - b. Generator's Name and Mailing Address
4. Populate the following Transporter information fields:
  - o Transporter 1 Company Name and U.S. EPA ID Number
  - o Transporter 2 Company Name and U.S. EPA ID Number
  - o Designated Facility Name and Site Address and U.S. EPA ID Number

Please print or type. Form Approved. OMB No. 2050-0039

<b>UNIFORM HAZARDOUS WASTE MANIFEST</b>		1. Generator ID Number	2. Page 1 of	3. Emergency Response Phone	4. Manifest Tracking Number	
		5. Generator's Name and Mailing Address <span style="float: right;">Generator's Site Address (if different than mailing address)</span>				
Generator's Phone:						
GENERATOR		6. Transporter 1 Company Name			U.S. EPA ID Number	
		7. Transporter 2 Company Name			U.S. EPA ID Number	
		8. Designated Facility Name and Site Address			U.S. EPA ID Number	
Facility's Phone:						
9a. HM	9b. U.S. DOT Description (including Proper Shipping Name, Hazard Class, ID Number, and Packing Group (if any))	10. Containers		11. Total Quantity	12. Unit WL/Vol.	13. Waste Codes
		No.	Type			
1.						
2.						

### Route Management - 'All' Option in Service Region Not Displaying (14910)

An issue has been fixed in Route Management that prevented the 'All' check box from displaying as a selection option in the Service Region drop down for the Current and Pending tabs.

The screenshot shows the 'Re-Number' tab in the Route Management interface. At the top, there are tabs for 'Pending', 'Current', and 'Re-Number'. Below the tabs, there is a 'Select Service Region' dropdown menu. The dropdown menu is open, showing three options: 'All', 'HOUSTON OPEN MARKET', and 'PEARLAND MUNICIPAL'. A red box highlights the dropdown menu, and a red arrow points to the 'All' option. The interface also shows a 'Select LOB' dropdown menu, a 'Monday, Tuesday, Wed' dropdown menu, and a 'LOAD' button. Below these elements, there is a table with columns for 'LOCATION' and 'QTY'.

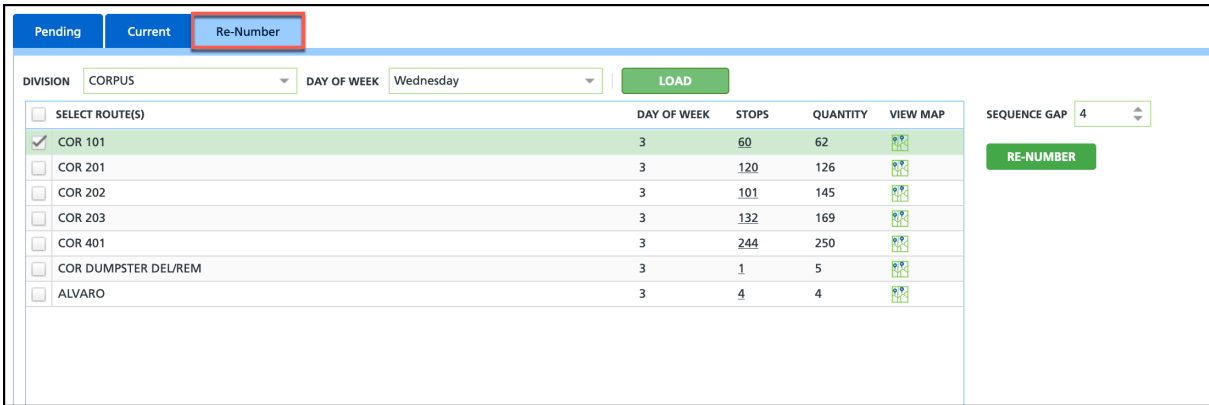
Pathway: Operations > Route Management

### Route Management - Re-Number Tab Updates (14788, 14916)

The following enhancements have been made to the Re-Number tab in Route Management:

1. **Division** and **Day of Week** filters have been added to display routes upon Load.
2. New columns added:
  - o Day of Week

- Identifies the day of the week for the route.
  - Stops
    - Link to open *Route Stop Details* and review a (read-only) list of the stops on the route.
  - Quantity
    - Displays the total service quantity on the route.
  - View Map
    - Displays the stops on a map.



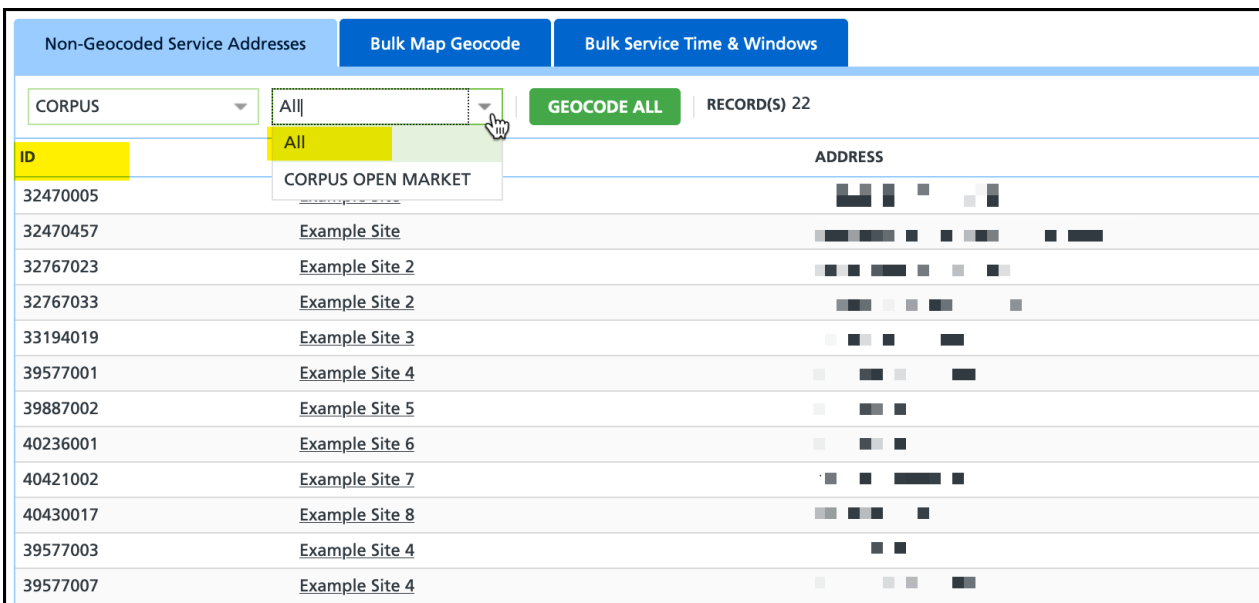
Pathway: *Operations > Route Management > Re-Number (Tab)*

Articles: [Route Management Overview](#), [Re-Number Route Sequences](#)

### Site Geocoding & Service Time - Screen Updates (14973)

The Site Geocoding & Service Time screen has been updated with the following:

1. ID column will display the site ID.
2. The Service Region filter will continue to display the 'All' option after first use.



Pathway: *Operations > Site Geocoding & Service Time*

### Dispatch - Route Optimization Running Time Updated to Display Local Time (15017) [Enhancement]

Route optimization running time has been updated to display in local time (timezone configured in Setup > System > System Options) and not the previously used UTC time. This is viewed by right-clicking on the route after optimization has been initiated.

PRE TRIP	POST TRIP	OPTIMIZED	SCHEDULED	SERVICED	PENDING	DO NOT SERVICE	EXCEPTIONS	DISPOSAL
			1	0	1 (100%)	0	0	0 (0 Tons)
			7	0	6 (86%)	1 (14%)	0	0 (0 Tons)
			65	0	45 (69%)	20 (31%)	0	0 (0 Tons)
						03 (85%)	0	0 (0 Tons)
						78 (88%)	0	0 (0 Tons)
						17 (91%)	0	0 (0 Tons)
						4 (1%)	0	0 (0 Tons)
			1	0	1 (100%)	0	0	0 (0 Tons)
			1	0	0	1 (100%)	0	0 (0 Tons)
			120	0	105 (88%)	15 (13%)	0	0 (0 Tons)

Scheduled

In Progress

Completed

Optimization running since 03/24/2023 6:34

Pathway: *Operations > Dispatch*

### Dispatch (Services List) - Productivity View Added (14163)[Enhancement]

A new "Productivity" option has been added to the view drop down on the Services List screen in Dispatch.

ROUTE	LOCATION	WO#	WO TYPE	EQUIPMENT	SERVICE TYPE	START TIME	COMPLETION TIME	END TIME	ESTIMATED REVENUE	ESTIMATED COST	PROFIT
ALVARO	32404006 *	6329883	Scheduled Service	42 Yard Receiver (Ser)	RO Dump/Ret...						
ALVARO	32404006 *	6329886	Scheduled Service	30 Yard Roll Off	RO Dump/Ret...						
ALVARO	33143002 *	6334992	Scheduled Service	40 Yard Roll Off	RO Dump/Ret...						
ALVARO	32404001 *	6336299	Scheduled Service	40 Yard Roll Off	RO Dump/Ret...						
ALVARO	32548002 *	6563359	Scheduled Service	40 Yard Roll Off	RO Dump/Ret...		8/21/23 1:40 pm				

Pathway: *Operations > Dispatch*

## Reports

### Analysis Reports - Added Columns to 'Sales Results Net New' Report (14802)[Enhancement]

Upon export to Excel, the following columns were added to the Sales Results Net New report:

1. Proposal Format
2. Contract Term Months
3. Contract Renewal Term Months
4. Old Rate Per Cubic Yard
5. New Rate Per Cubic Yard

Columns were added to the **Sales Result Details** export.

REPORTS > ANALYSIS > SALES RESULTS NET NEW

SALES RESULT DETAILS SALES RESULT

CONTROLLABLE	NON-CONTROLLABLE	DECREASES	NET TOTAL	TEMP / SEASONAL	1085
\$ 0.00 0	\$ 0.00 0	\$ 0.00 0 (0 Sites)	\$ 271.44	\$ 0.00 0 (0 Sites)	5.0277%
\$ 0.00 0	\$ 0.00 0	\$ 0.00 0 (0 Sites)	\$ 7.00	\$ 0.00 0 (0 Sites)	N/A
\$ 0.00 0	\$ 0.00 0	\$ 0.00 0 (0 Sites)	\$ 2.28	\$ 0.00 0 (0 Sites)	N/A
\$ 0.00 0	\$ 0.00 0	\$ 0.00 0 (0 Sites)	\$ 0.00	\$ 0.00 0 (0 Sites)	N/A
\$ 0.00 0	\$ 0.00 0	\$ 0.00 0 (0 Sites)	\$ 12.00	\$ 0.00 0 (0 Sites)	N/A

Pathway: Reports > Analysis > Sales Results Net New

### Analysis Reports - Sales Results Net New Screen Updates (14838)

The Sales Result Details screen of the Sales Results Net New report has been updated with the following:

1. A search box has been added.
2. The toolbar was reordered to the following: Show Map, Export and Search.
3. Column alignment formatting completed for many of the columns.
4. The Reason Code column has been hidden on the grid and will only display in a CSV export.
5. The LOB column has been renamed to 'Line of Business'.
6. An 'Internal Sales Note' column has been added and will only display in a CSV export.

SALES RESULTS NET NEW

TYPE Period Feb 2023 DIVISION All LINE OF BUSINESS All

GROUP BY Sales Rep

	NEW	INCREASES	GROSS TOTAL	CONTROLLABLE	NON-CONTROLLABLE	DECREASES	NET TOTAL
House Account	\$ 0.00 1 (1 Sites)	\$ 271.44 10 (7 Sites)	\$ 271.44	\$ 0.00 0	\$ 0.00 0	\$ 0.00 0 (0 Sites)	\$ 271.44
House Account	\$ 0.00	\$ 7.00	\$ 7.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 7.00

SALES RESULT DETAILS

House Account - New & Increases

SHOW MAP Search

DIVISION	LINE OF BUSINESS	SOURCE	RATE UPDATE BATCH	SERVICE REGION	ACCOUNT CLASS	EQUIPMENT TYPE	SITE ID	SITE	START DATE	RATE CHANGE	1085
QAWASTE	Commercial	SEO Web Inquiry		HOUSTON OPE...	COMMERCIAL	6 Yard FL	45557003	Road Runner B...	02/01/23	\$ 32.48	5%
QAWASTE	Commercial	SEO Web Inquiry		HOUSTON OPE...	COMMERCIAL	8 Yard FL	45557003	Road Runner B...	02/01/23	\$ 38.11	5%
QAWASTE	Commercial	SEO Web Inquiry		HOUSTON OPE...	COMMERCIAL	8 Yard FL	45557004	Road Runner B...	02/01/23	\$ 8.32	5%
QAWASTE	Commercial	SEO Web Inquiry		HOUSTON OPE...	COMMERCIAL	8 Yard FL	45557005	George B Lindle...	02/01/23	\$ 8.32	5%
QAWASTE	Commercial	SEO Web Inquiry		HOUSTON OPE...	COMMERCIAL	2 Yard FL	45557007	Road Runner B...	02/01/23	\$ 8.97	5.072...
QAWASTE	Commercial	SEO Web Inquiry		HOUSTON OPE...	COMMERCIAL	2 Yard FL	45557007	Road Runner B...	02/01/23	\$ 9.10	5%
QAWASTE	Commercial	SEO Web Inquiry		HOUSTON OPE...	COMMERCIAL	8 Yard FL	45557008	Republic Bag Inc	02/01/23	\$ 12.47	5%
QAWASTE	Commercial	SEO Web Inquiry		HOUSTON OPE...	COMMERCIAL	8 Yard FL	45557009	ROADRUNNER ...	02/01/23	\$ 19.06	5.090...
QAWASTE	Commercial	SEO Web Inquiry		HOUSTON OPE...	COMMERCIAL	6 Yard FL	45557009	ROADRUNNER ...	02/01/23	\$ 128.61	5.090...
QAWASTE	Residential			DAYTON OPEN ...	RESIDENTIAL	96 Gallon Trash	29656001	TRUESDALE DIA...	02/01/23	\$ 6.00	N/A
QAWASTE	Roll Off			DAYTON OPEN ...	RESIDENTIAL	10 Yard Roll Off	18857001	RICE CHARLYN ...	02/01/23	\$ 0.00	N/A

Pathway: Reports > Analysis > Sales Results Net New

### Standard Reports (AR) - Payment Reversals, Transfers and Refunds Report Split into Two Reports (14892) [Enhancement]

The Payment Reversals, Transfers and Refunds report has been broken out into two separate reports:

1. Payment Reversals and Refunds
2. Payment Transfers

Both reports are available in Standard Reports > AR.

### Payment Reversals and Refunds

Period: Dec 2022

Date	Division	Account	Type	Payment Type	Amount	Note
12/23/2022	CORPUS		Reversal	Credit Card	139.98	res class \ corpus
12/27/2022	CORPUS		Reversal	Check	0.05	Reverse Payment
12/28/2022	CORPUS		Refund	eCheck	15.00	
12/28/2022	CORPUS		Reversal	eCheck	196.89	this is chargeback
<b>Payment Total</b>					<b>\$ 351.92</b>	

### Payment Transfers

Period: Jan 2023

Date	From Division	From Account	To Division	To Account	Amount	Note
01/11/2023	DAYTON	CONSTRUCTION INC	DAYTON		880.77	
<b>Payment Total</b>					<b>\$ 880.77</b>	

Pathway: Reports > Standard Reports > AR> Payment Reversals and Refunds; Payment Transfers

### All Reports - Report Time Stamp to Display Local Time (14864)

Timestamp logic has been updated to all reports to use local time.

### Payment Batch Listing

Period: Mar 2023

ID	Status	Bank Account	Deposit Date	Count	Total	Created by	Created Date	Posted Date	Note
10847	Open	COMERICA - FWS	3/1/23	0	0.00		3/9/23 5:09 PM		
<b>Division</b>					<b>Total</b>				
					<b>Total</b>	<b>\$ 0.00</b>			

Pathway: Reports > Standard Reports; Analysis; Custom; Generate Manifest Summary Report

### AR Reports - \*New\* Work Order Payments Report (14825)[Enhancement]

A new report 'Work Order Payments' is available within AR reports and provides payment data based on the filter parameters selected. Start Date, End Date and Division are required to generate the report.

WORK ORDER PAYMENTS	
PARAMETER	VALUE
Start Date *	03/06/2023
End Date *	03/28/2023
Division *	HOUSTON
Created By User	
Payment Type	

RUN REPORT
RUN AS EXCEL

Page 1 of 1

### Work Order Payments

**Start Date:** 03/06/2023, **End Date:** 03/28/2023, **Division:** HOUSTON

ACCT #	ACCOUNT NAME	WO #	PAYMENT TYPE	REFERENCE	NOTE	AMOUNT
<b>HOUSTON, By: David Navarro, Pyment Type: Cash</b>						
48921	Scale In tesing	5714123	Cash	TestIV:	Voided Amount: 10.00 on 2023-03-13 by David Navarro	0.00
					<b>Total</b>	<b>Records - 1</b>
					<b>\$ 0.00</b>	
<b>HOUSTON, By: David Navarro, Pyment Type: Credit Card</b>						
48921	Scale In tesing	5714123	Credit Card			0.00
48921	Scale In tesing	5714123	Credit Card	60808014_9999IV: 60808017_9999	Voided Amount: 15.00 on 2023-03-13 by David Navarro	0.00
48921	Scale In tesing	5714123	Credit Card	60808121_9999		20.00
48921	Scale In tesing	5714123	Credit Card	60829018_9999		150.00
48921	Scale In tesing	5714123	Credit Card	60829042_9999		15.00
48921	Scale In tesing	5747742	Credit Card	60829103_9999		2.00
					<b>Total</b>	<b>Records - 6</b>
					<b>\$ 187.00</b>	
					<b>Grand Total</b>	<b>Records - 7</b>
					<b>\$ 187.00</b>	

Pathway: Reports > Standard Reports > AR > Work Order Payments

## Setup

### Operations - View Link Added to Disposal/Ship Location Setup (14843)

A 'View' link option has been added to the Disposal / Ship Location Setup screen to view a signature if one has been attached. Signatures are attached in the 'Add Disposal / Ship Location' or 'Update Disposal / Ship Location' screens.


DISPOSAL / SHIP LOCATION SETUP										SETUP > OPERATIONS > DISPOSAL / SHIP LOCATION				
ID	NAME	TYPE	ACTIVE	CITY	STATE	ZIP	DEFAULT UOM	DIVISION	SCALE PAYLOAD START OFFSET	SCALE PAYLOAD LENGTH	OWNERSHIP	SIGNATURE BY	SIGN	ICON
1032	Exacmple Account 1	Processing	Active	CUST SITE Cl...	TX	78405	Ton	CORPUS			Internal			
1033	Exacmple Account 2	Transfer S...	Active	Houston	TX	77042	Ton	HOUSTON			Internal			
1034	Exacmple Account 3	Landfill	Active	Alvin	TX	77511	Ton	HOUSTON			Internal			
1035	Exacmple Accoun...	Recycle Ce...	Active	Houston	TX	77035-5709	Ton	HOUSTON			Internal			
1036	Exacmple Account 5	Recycle Ce...	Active	Houston	TX	77022-6321	Ton	HOUSTON						
1037	Exacmple Accoun...	Recycle Ce...	Active	Beeville	TX	78102-5411	Ton	CORPUS						
1038	Exacmple Accoun...	Landfill	Active	Corpus Christi	TX	78415-6803	Tip	CORPUS			Third Party	Timmy Taylor	View	
1039	Exacmple Accoun...	Processing	Active	Corpus Christi	TX	78405-4203	Ton	CORPUS						
1040	Exacmple Account 8	Landfill	Active		OH	45069-4979		DAYTON						
1041	Exacmple Account 9	Landfill	Active	Middletown	OH	45042		DAYTON						
1042	Exacmple Accoun...	Landfill	Active	Loveland	OH	45140-7394		DAYTON						
1043	Exacmple Accoun...	Processing	Active	Warren	OH	44483		DAYTON						
1044	Exacmple Accoun...	Processing	Active	Liberty Twp	OH	45044	Ton	DAYTON						
1045	Exacmple Accoun...	Transfer S...	Active	West Chester	OH	45069	Ton	DAYTON						

Pathway: Setup > Operations > Disposal/Ship Location

### Operations (Work Type) - Enhancements to Service Notifications (14781)[Enhancement]

The following changes have been applied to Service Notifications:

- Update to existing alert names to indicate alerts are sent based on calendar days (Monday - Sunday)
  - The existing 'Service reminder for every x weeks services (Send 3 **Calendar** days prior to scheduled service at 7am)
  - The existing 'Service reminder for every x weeks services (Send 2 **Calendar** days prior to scheduled service at 7am)
  - The existing 'Service reminder for every x weeks services (Send 1 **Calendar** day prior to scheduled service at 7am)
- New alerts added to indicate alerts are sent based on business days (Monday - Friday):
  - Service reminder for every x weeks services (Send 3 **business** days prior to scheduled service at 7am)
  - Service reminder for every x weeks services (Send 2 **business** days prior to scheduled service at 7am)
  - Service reminder for every x weeks services (Send 1 **business** day prior to scheduled service at 7am)

WORK TYPE SETUP					
 LINE OF BUSINESS <input type="text" value="All"/>					
ID	NAME	LOB	ACTION CATEGORY	INVENTORY MOVE TYPE	MANIFEST NOTIFICATION TEMPLATE
DUMPNLY	Dump Only	Roll Off		None	
FL_DELIVER	FL Delivery	Commercial	Delivery	Delivery	
FL_EXCHNGE	FL Exchange	Commercial	Swap	Exchange	
FL_EXTRAPU	FL Extra Pick Up	Commercial		None	
FL_MISSED	FL Missed Pick Up	Commercial		None	
FL_MOVE	FL Move	Commercial		None	
FL_RELOCAT	FL Relocate	Commercial		None	
FL_REMOVE	FL Removal	Commercial	Removal	Removal	
FL_REPAIR	FL Repair	Commercial	Repair	None	
FL_SERVICE	FL Service	Commercial		None	
INBOUNDLD	Inbound Load	Landfill	Inbound Load	None	
RETURNBOX	Return Box	Roll Off		None	

Alerts	Surcharges
<b>NOTIFICATION TYPE</b> Order Creation (Send immediately) Service Completion (Send immediately upon status update) Service Completion (Send at 7pm) Service Completion (Send immediately upon order posting) Service Completion Summary (Send end of the day) Service Cancelled Notification (Send immediately upon status update) Service Rescheduled Notification (Send immediately upon schedule change) Not Serviced Notification (Send immediately upon status update) Service reminder for every x weeks services (Send 3 Calendar days prior to scheduled service at 7am) Service reminder for every x weeks services (Send 2 Calendar days prior to scheduled service at 7am) Service reminder for every x weeks services (Send 1 Calendar day prior to scheduled service at 7am) Service reminder for every x weeks services (Send 3 business days prior to scheduled service at 7am) Service reminder for every x weeks services (Send 2 business days prior to scheduled service at 7am) Service reminder for every x weeks services (Send 1 business day prior to scheduled service at 7am) Service reminder for on call services (Send day of scheduled service at 7am) Service reminder for on call services (Send 1 day prior to scheduled service at 7am)	

Pathway: Setup > Operations > Work Type

### Services - Rate UOM Selection Options Updated in Charge Code Setup (14947)

The Rate UOM field in Charge Code setup has been updated to limit the list of options to types that relate to volume, weight, area, each (per unit) and length. Time based UOMs have been removed.

ADD CHARGE CODE			
Charge Code			
CHARGE CODE	<input type="text"/>	ACTIVE	<input type="text" value="Yes"/>
NAME	<input type="text"/>	ENABLE NO CHARGE QUANTITY	<input type="text" value="No"/>
DOT DESCRIPTION	<input type="text"/>	ENABLE NEGATIVE AMOUNT	<input type="text" value="No"/>
LINE OF BUSINESS	<input type="text"/>	ENABLE MAX. WEIGHT CHARGE	<input type="text" value="No"/> UOM <input type="text"/>
EQUIPMENT TYPE	<input type="text"/>	ESTIMATED AVERAGE WEIGHT	<input type="text"/>
MATERIAL TYPE	<input type="text"/>	ENABLE MANUAL CHARGE	<input type="text" value="No"/>
RATE UOM	<input type="text"/>	ENABLE MINIMUM	<input type="text" value="No"/>
TAXABLE	<input type="text" value="No"/> CLASS <input type="text"/>	ENABLE VENDOR	<input type="text" value="No"/>
GL ACCOUNT	<input type="text"/>	ENABLE EST. CHARGE QUANTITY	<input type="text" value="No"/>

Pathway: Setup > Services > Charge Code

## System - Unit of Measure Setup Screen Re-Added (14981)[Enhancement]

The Unit of Measure Setup screen has been re-added to Setup > System and uses the following logic:

- Edits to all existing UOMs are restricted to the Active status.

UNIT OF MEASURE SETUP									
ID	NAME	PLURAL NAME	ABBREVIATION	PLURAL ABBREVIATION	UNICODE ABBREVIATION	DECIM... PLACES	EXTERNAL ID	TYPE	ACTIVE
1	cubic yard	cubic yards	cuyd	cuyds	yd <sup>3</sup>	2		Volume	Active
2	ton	tons	T	T		4		Weight	Active
3	day	day	day	day		0		Service	Active
4	week	week	wk	wk		0		Service	Active
5	month	month	mth	mth		0		Service	Active
6	unit	units	unit	units		2		Service	Active
7	barrel	barrels	barre	barres		2			Active
8	gallon	gallons	G	G		2		Volume	Active
9	gallon	gallons	gallo	gallos		2		Volume	Active
10	service	services	servi	servis		2		Service	Inactive
21	microgram per gram	micrograms per gram	ug/g	ug/g		2		Lab Test	Active

Pathway: Setup > System > Unit of Measure

## Paper Invoice Fee Functionality Added (14975)[Enhancement]

New functionality has been added to the account's Bill Group to support the *Paper Bill Fee* option. Once enabled, fees display in Customer Service and on the invoice for all accounts assigned to the Bill Group. If an account should be excluded from the fee, select the 'Exclude Paper Bill Fee' check box from the Edit Account screen.



Review the article and overview video links attached at the bottom of this page for further details and setup.

**43243 QA Waste Services**

PO BOX 541158  
Pearland, TX 77254-1158  
+1 555-555-1234

*Active*

DIVISION Pearland  
ACCOUNT MGR House Account  
CLASS COMMERCIAL  
BILL GROUP HOU-COMMERCIAL ARREARS  
ArrearsMonthly Billed Thru Date Jan 01, 2023  
Next Invoice Date Jan 01, 2023 BATCH-25540 (in progress)

OLD ID PRLD-95  
INVOICE BY EMAIL No Paper Bill Fee \$4.95  
TERMS Net 20  
AUDITOR House Account  
SOURCE null

**43243001 QA Waste Services**

1 of 1  
222 Navu St  
PEARLAND, TX 77581-3184  
222 Navu St  
ACCESS  
NOTE

CURRENT 1-30 31-60 61-90 91-120 120+ TOTAL

0.00

**HIGHLIGHTS**

ACTIVE SERVICES (1) Standard

QTY	SERVICE CODE
2	8 Yard Trash Service

CALENDAR March

SUN

**QA Waste Services - HOUSTON**

Corpus Christi TX 78426

<b>CUSTOMER NO</b>	44990
<b>INVOICE DATE</b>	Jan 1, 2023
<b>INVOICE NO</b>	860251
<b>DUE DATE</b>	Jan 21, 2023

<b>BALANCE FWD</b>	\$ 0.00
<b>PAYMENTS</b>	\$ 0.00
<b>CREDITS</b>	\$ 0.00
<b>CHARGES</b>	\$ 188.71
<b>BALANCE DUE</b>	\$ 0.00

**Example Site**

Pearland TX 77584

**Site 44990001 - Brazoria County MUD 03 STP - 3015 County Rd 89**

WO #	DATE	DESCRIPTION	QTY	UNIT RATE	TOTAL
	12-01-22-12-31-22	3 Yard Trash Service	1.00	132.41	132.41
	12-01-22-12-31-22	Enclosure	1.00	27.38	27.38
	01-01-23	Paper Bill Fee -	1.00	4.95	4.95
	01-01-23	Pearland Franchise Fee			23.97
<b>Taxes</b>					0.00
<b>Site Total</b>					188.71
<b>Invoice Total</b>					188.71

Pathway: [Setup](#) > [Accounting](#) > [Bill Group](#)

Articles: [Paper Bill Fee Setup](#)

Overview: [Paper Bill Fee Overview Video](#)

### Service Code - 'Bill Zero Amount' Added to Setup (15027)[Enhancement]

A 'Bill Zero Amount' billing setting has been added to Service Code setup. Options for this setting include 'Yes' or 'No'.

ADD SERVICE CODE
?
✕

Service Code

SERVICE CODE	<input type="text"/>	ACTIVE	<input type="text" value="Yes"/>
NAME	<input type="text"/>	ENABLE ROUTING	<input type="text" value="No"/>
LINE OF BUSINESS	<input type="text"/>	REQUIRE FREQUENCY	<input type="text" value="Yes"/>
EQUIPMENT TYPE	<input type="text"/>	ENABLE DRIVER UPDATE	<input type="text" value="No"/>
MATERIAL TYPE	<input type="text"/>	ENABLE ACCOUNT SIGNATURE	<input type="text" value="No"/>
UOM	<input type="text"/>	ENABLE DRIVER SIGNATURE	<input type="text" value="No"/>
TAXABLE	<input type="text" value="No"/> CLASS <input type="text"/>	ENABLE WORK ORDER MINIMUM	<input type="text" value="No"/>
GL ACCOUNT	<input type="text"/>	ENABLE RENTAL FEE	<input type="text" value="No"/>
PRORATION METHOD	<input type="text" value="Calendar Days - Start and End"/>	ENABLE DEFAULT DESTINATION	<input type="text" value="No"/>
BILL WHILE ON CREDIT HOLD	<input type="text" value="Yes"/>	ENABLE NEGATIVE AMOUNT	<input type="text" value="No"/>
IS AP TRANSACTION	<input type="text" value="No"/>	ENABLE ESTIMATES TRACKING	<input type="text" value="No"/>
EST MONTHLY VOL UOM	<input type="text"/>	ENBL EQUIPMENT OWNERSHIP	<input type="text" value="No"/>
IS SHELL	<input type="text" value="No"/>	ENABLE SHARE	<input type="text" value="No"/>
PRICING MODEL	<input type="text" value="None"/>	ENABLE VENDOR	<input type="text" value="No"/>
CALCULATE RATE PER YARD	<input type="text" value="No"/>	ENABLE SITE SERVICE CLASS	<input type="text" value="No"/>
CALCULATION METHOD	<input type="text" value="None"/>	ENABLE DISCOUNTS	<input type="text" value="No"/>
WORK TYPE EVENT CLASS	<input type="text"/>	COMPOSITION MATERIAL CLASS	<input type="text"/>
BILL ZERO AMOUNT	<input type="text" value="No"/>		

Pathway: Setup > Services > Service Code

## Database

### Merge Sites Logic Updated

Site matching logic has been updated to use both Address Line 1 and Address Line 2. Additionally, if Address Line 2 is populated it will display in the same column as the Address Line 1.

MERGE SITES / POTENTIAL DUPLICATES								
DIVISION		Match on Address						
HOUSTON								
SITE ID ↓	STATUS	CREATED ON	NAME	ADDRESS	SALES REP	BILLING ACTIVITY	PROPOSAL COUNT	
= 123 SOUTHBELT INDUST, ADDR 2 (2)								
47396002	Active	08/31/22	Example Account	123 Southbelt Industrial Dr, addr 2	Janet Mahone	Yes	2	
47396001	Inactive	07/18/22	Example Account	123 Southbelt Industrial Dr, addr 2	Janet Mahone	Yes	1	
= 1230 BASS PRO (1)								
44471231	Active	10/04/21	Bass Pro Shop - Temp Roll Off	1230 Bass Pro	Janet Bettcher	Yes	2	
= 22222 BROADWAY ST (2)								
45650001	Active	02/03/22	24 HOUR FITNESS	22222 Broadway St	House Account	Yes	0	
43939001	Inactive	07/29/21	24 HOUR FITNESS	22222 BROADWAY ST	House Account	Yes	0	

Pathway: Database > Merge Sites

# Portal

## Credit Card and eCheck Payment Batches Improvement (14512)

An issue has been resolved in the Customer Portal that was causing Credit Card and eCheck payment batches from not separating correctly.

**Pathway:** *Customer Portal > Payments*

## Portal - Invoice By Email Enrollment Available Through Customer Portal (14976)[Enhancement]

The Customer Portal has been updated to provide portal users the option to manage their paperless billing preference.

### Requirements:

- The portal user must be a billing contact **OR** an account contact for an account that has no billing contacts identified.
  - If the portal user is currently an account contact, their contact status will be updated to first billing contact upon selecting a billing preference.
  - If the portal user is neither a billing contact nor an account contact, a link will not display.

### Customer Portal Display Links

Link Displayed	Description
<i>Invoice By Mail - Enable Paperless Billing</i>	Displays if the account's billing setup is set to receive paper billing.
<i>Manage</i>	Displays if the account's billing setup reflects either email link, or email attachment.



When a user selects either link, the following options display:

- Receive Invoice Link Electronically
- Receive Invoice PDF by Email
- Receive Paper Invoice by Mail

**Pathway:** Portal

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