

## Release Version 69 [Archive]

Last Modified on 08/06/2025 7:58 am PDT



The release notes in this article correspond to version 69. Screens and logic may have changed in newer versions.

# Home Screen

## Account Requests - Logic Updated for Text Notifications (15173)

Logic was updated to Account Requests to send a text message notification to the Sales Rep on the account when a request is received from the Customer Portal. A text message is also sent to any user a request is reassigned to. This follows similar text message logic as Task notifications.

**Pathway:** *Customer Portal; Account Requests (Icon in Core)*

## Accounts

## AR History - Authorization Code Added to Payment Receipt (14476)[Enhancement]

Payment receipts have been modified to include the Authorization Code below the Payment Method.

QA Waste Services - DAYTON  
PO BOX [REDACTED]  
Corpus Christi, TX 78426  
Phone: [REDACTED]

**Payment Receipt - 178271**

**Payment Date:** March 29, 2023  
**Account Id:** 48905  
**Account Holder Name:** Krispy Kringle  
**Payment Method:** Visa 1111  
**Authorization Code:** 123456\_DEMO\_AUTH  
**Amount Paid:** \$ 5.37

**Invoices Paid:** 850048

**Pathway:** Accounts > Search > Account (Customer Service) > AR History

## AR History - Invoice Adjustment Date Sort Updated (15126)

Sort logic has been updated in the Invoice Adjustment screen to correctly sort dates when clicking on Date in the column head.

AR HISTORY

CURRENT	1-30 DAYS	31-60 DAYS	61-90 DAYS	91-120 DAYS	120+ DAYS	TOTAL
69.25	0.00	0.00	221.89	0.00	1,337.24	1,628.38

☒ Limit to open items

INVOICE ADJUSTMENT

DATE

DUE DATE

04/03/23	04/23/23
01/01/23	01/21/23
11/15/22	05/05/22

INVOICE

836211

11/15/22

AMOUNT \$ 1,337.24

CREATED BY Aliena Somers

Apr 17, 2023 03:19 pm

REASON CODE

PERIOD 2023-04

NOTE

☐ CREDIT ENTIRE INVOICE

DATE	SITE ID	SITE NAME	WO#	QUANTITY	DESCRIPTION	INVOICE AMOUNT	PREVIOUS ADJUSTMENT	PENDING ADJUSTMENT(S)	ADJUSTMENT AMOUNT
11/02/22	30085005	Example Site	5018517	1.00	Roll Off Haul	\$ 495.00	\$ 0.00	\$ 0.00	
11/11/22	30085002	Example Site	5066529	1.00	Roll Off Haul	\$ 550.00	\$ 0.00	\$ 0.00	
11/15/22	30085002	Example Site		0.00	Fuel Surcharge-Roll Off	\$ 100.16	\$ 0.00	\$ 0.00	
11/15/22	30085005	Example Site		0.00	Fuel Surcharge-Roll Off	\$ 90.14	\$ 0.00	\$ 0.00	
11/15/22	30085002	Example Site		0.00	BAYTOWN CITY	\$ 6.88	\$ 0.00	\$ 0.00	
11/15/22	30085002	Example Site		0.00	CHAMBERS CO HEAL...	\$ 2.75	\$ 0.00	\$ 0.00	

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

## AR History - Email Receipt (15261)

Previously, email payment receipts and refund receipts in AR History were labeled as 'Credit Card Receipt Email', regardless of the actual transaction type. This has been renamed to 'Email Receipt'.

AR HISTORY

CURRENT	1-30 DAYS	31-60 DAYS	61-90 DAYS	91-120 DAYS	120+ DAYS	TOTAL
130.50	95.25	227.76	50.00	0.00	0.00	503.51

DEPOSIT AMOUNT

-114.00

☒ Limit to open items
 

STATEMENT

INVOICE

AUTO APPLY

BALANCE WRITE OFF

PAYMENT METHODS (4) / AUTO PAY MAX \$0

☒ Search

DATE	DUE DATE	PERIOD	SITE ID	TYPE	REFERENCE NO	AMOUNT	APPLIED AMOUNT	BALANCE
05/12/23	06/01/23	2023-05		Invoice	870863	30.00		30.00
05/12/23	06/01/23	2023-05		Invoice	870862	132.00		132.00
04/17/23		2023-04		Payment - Bank Account - eCheck	123456_DEMO_AUTH	(52.50)	42.50	(10.00)
04/17/23		2023-04		Payment - Visa - Credit Card	123456_DEMO_AUTH	(15.75)	0.75	(15.00)
04/17/23		2023-04		Deposit - Check		(99.00)	0.00	(99.00)
04/14/23	04/14/23	2023-04	48910001	Invoice		0.35		0.35
04/13/23		2023-04		Payment - Visa - Credit Card		(6.50)	0.00	(6.50)
04/01/23	04/21/23	2023-04		Invoice				
03/01/23		2023-03		Deposit - Check				
03/01/23	03/21/23	2023-03		Invoice				
02/28/23	03/20/23	2023-02		Invoice	867002			
02/01/23	02/21/23	2023-02		Invoice	849911			

Auto Apply

Auto Apply to next Invoice

Email

Print Receipt

Record Chargeback

Refund Payment

EMAIL RECEIPT

EMAIL TO CONTACT

EMAIL TO

SEND EMAIL

Pathway: Accounts > Search > Accounts > AR History

## AR History - New Option Added to Print or Email a Payment Refund (15186)[Enhancement]

AR History has been updated to include the option to email or print payment refunds. Using the same method as other payment receipts, right-click on the desired payment refund and select either *Email* or *Print Receipt*.

AR HISTORY

CURRENT

1-30 DAYS

31-60 DAYS

61-90 DAYS

91-120 DAYS

120+ DAYS

TOTAL

0.00

0.00

0.00

0.00

0.00

78.72

78.72

Limit to open items

STATEMENT

INVOICE

AUTO APPLY

BALANCE WRITE OFF

PAYMENT METHODS (2)

Search

DATE	DUE DATE	PERIOD	SITE ID	TYPE	REFERENCE NO	AMOUNT	APPLIED AMOUNT	BALANCE	RUNNING SUM
05/11/23	2023-05			Declined - Bank Account - eCheck	123456	0.00			78.72
05/11/23	2023-05			Payment - Bank Account - eCheck	123456_DEMO_...	(1,921.28)	1,921.28		78.72
05/11/23	2023-05			Declined - Bank Account - eCheck	123456	0.00			2,000.00
05/11/23	2023-05			Payment - Bank Account - eCheck	123456_DEMO_...	(1,921.28)			2,000.00
05/11/23	2023-05			Chargeback Reversal - Bank Ac...	123456_DEMO_...	1,921.28			3,921.28
04/27/23	2023-04			Payment - Check	33541	(76.72)	76.72		2,000.00
12/28/22	2022-12			Chargeback Reversal - Bank Ac...	51842333_AUTH...	196.89			2,076.72
12/28/22	2022-12			Payment Refund - Bank Accou...		15.00			1,879.83
12/27/22	2022-12			Payment Transfer - Check		20.00			1,864.83
12/27/22	2022-12			Payment - Check		(120.00)	100.00		1,844.83

Pathway: Accounts > Search: Accounts > AR History

## AR History - Field Update in Account Payment Methods (15405)

The "Bank Account Type" field in Add Account Payment Methods has been changed from a text field to a selection drop down field. This resolves the problem where an error would occur when an unsupported entry was entered, and the user tried to save it.

AR HISTORY

CURRENT

1-30 DAYS

31-60 DAYS

61-90 DAYS

91-120 DAYS

120+ DAYS

ACCOUNT PAYMENT METHODS

+

ACCOUNT HOLDER NAME	LAST 4 DIGITS	TYPE	EXPIRATION DATE	AUTO PAY	DAY OF MONTH	AUTO PAY MAX	ACTIVE	CREATED BY
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ADD ACCOUNT PAYMENT METHODS

TYPE

Bank Account

NAME

ACCOUNT NUMBER

VERIFY ACCOUNT NUMBER

ROUTING NUMBER

BANK ACCOUNT TYPE

AUTOMATED PAYMENT

AUTOPAY AMOUNT

DESCRIPTION

SAVE

Pathway: Accounts > Search: Account > AR History (Customer Details)

## AR Payment Batch - Display of Work Order Number (15469)[Enhancement]

The Batch screen has been updated to display the work order number under the account name if the payment is associated to a work order (payment was collected on the Payments tab of the Service Record/Work Order).

BATCH - 10964 DIVISION - DAYTON

DATE06/01/2023

BANK ACCOUNTCOMERICA - FWS

AMOUNT \$ 13,62

NOTE

CREATED BY: John Doe - 06/01/2023 7:22 am

POSTED BY:

Search for Account/ Site

Double click on search result to add payment

ACCOUNT ID	STATUS	BALANCE	ACCOUNT NAME	SITE ID	SITE NAME

SORTEntry Order ↓

Search for Payme

ACCOUNT ID	NAME	STATUS	BALANCE	TYPE	REFERENCE	AMOUNT	AP AM
48910	Example Account 1 WO# 6262524	Active	\$(0.20)	Credit Card	123456_DEM...	54.00	5
26034	Example Account 2 WO# 6262524	Credit Hold	\$ 1,143.00	Credit Card	123456_DEM...	3.00	
48288	Example Account 3 WO# 6262524	Active		Credit Card	123456_DEM...	872.91	87
48288	Example Account 3 WO# 6262524	Active		Credit Card	123456_DEM...	12,690.74	12,69

Pathway: Accounting > AR Payment Batch: Select Batch

## AR History - Logic Updates to Account Payment Method (15492)

Logic has been updated to the AR History screen to not include Quick Pay in Payment Methods. Previously, these were included and displayed as "Recently Expired."

AR HISTORY

CURRENT224.00

1-30 DAYS0.00

31-60 DAYS10.80

61-90 DAYS0.00

91-120 DAYS0.00

120+ DAYS0.00

TOTAL234.80

DEPOSIT AMOUNT-114.00

☒ Limit to open items
 STATEMENT
 INVOICE
 AUTO APPLY
 BALANCE WRITE OFF
 PAYMENT METHODS (2) / AUTO PAY MAX \$1100

Search

DATE ↓	DUE DATE	PERIOD	SITE ID	TYPE	REFERENCE NO	AMOUNT	APPLIED AMOUNT	BALANCE
07/25/23	08/14/23	2023-07		Invoice	881461	43.00		43.00
07/24/23	08/13/23	2023-07		Invoice	881463	96.00		96.00
07/21/23	08/10/23	2023-07		Invoice	881462	48.00		48.00
07/21/23	08/10/23	2023-07		Invoice	881460	48.00		48.00
07/11/23		2023-07		Payment - Visa - Credit Card	123456_DEMO_AUTH	(11.00)	0.00	(11.00)
06/01/23	06/21/23	2023-06		Invoice	872808	65.80	(55.00)	10.80

Pathway: Open Account > Select "AR History"

## Account - Total Recurring Displays on all Views in Active Services (15080)[Enhancement]

Total Recurring has been added to display in all Active Services views. Total Recurring is the sum of all rates for recurring services.

ACTIVE SERVICES (2)		Standard			TOTAL RECURRING \$ 50.00					
QTY	SERVICE CODE	SERVICE ID	FREQUENCY	SCHEDULE	RATE	START DATE	END DATE	CONTRACT EXP.	WO MIN.	
1	Regulated Medical Waste Service	50A2	2x per week	W,F	\$ 0.00 per month	02/28/23				...
1	Regulated Medical Waste Service	5549	1x per week	T	\$ 50.00 per month	03/20/23				...

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

## Accounts - Auto Pay Option Added to AP Payment Methods (14746)[Enhancement]

The 'Auto Pay' option has been added to the Default Payment Method for an account and will display in AP Check Batches.

**BILL GROUP** DAY-ROLF BI-WEEKLY

Arrears - Twice a month Billed Thru Date Jan 31, 2023 Next Invoice Date Jan 31, 2023 BATCH-25574 (in progress)

**INVOICE BY EMAIL** Email With Link

**TERM** Net 20 **LIMIT**

**AP**

**DEFAULT PAYMENT METHOD** Auto Pay **PAYEE NAME**

**INSTRUCTIONS**

**WARNING ON OPEN**

ACH  
Account Payment Portal  
**Auto Pay**  
Credit Card Payment  
Mail Check Account  
Mail Check Site  
Not Applicable  
Onsite Debit Card  
Wait on Account Invoice

**SAVE**

Pathway: Accounts > Search > Accounts (Customer Service Screen) > right click Edit Account

## 'Reason Code' Drop Down in Create On Call Order Updated

Options available in the Reason Code drop down for On Call Orders have been corrected to limit to reason codes specific to On Call. In Setup > System> Reason Code, if Type = On Call, the reason code will display.

**CREATE ON CALL ORDER**

**SCHEDULE DATE** 03/26/23 Sunday **SERVICE CODE** **ORDER TYPE** **QUANTITY** 1

**REQUESTED BY** **CONTACT**

**ORDER NOTES**

**PO NUMBER** **BLANKET PO** **EXTERNAL ID**

**ROUTE**

**REASON CODE**


Billable pickup  
Courtesy pickup  
Missed Pickup





Pathway: Accounts > Search > Accounts (Customer Service Screen) > Create On Call Order

## Accounts - Logic Updated to Inventory Count (15127)

Logic has been updated to Inventory count to limit the count to only include the current site's inventory.

30085002 | **Example Account**

2 of 5  1234 Navu St  
Baytown, TX 77521  
(555) 555-1234

**Active**

**DIVISION** DAYTON  
**SERVICE REGION** DAYTON OPEN MARKET  
**SALES REP** Dave Anderson

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

## Accounts - Service Record Disposal Entry Ticket (15099)

Previously, when a user added a disposal record in the Disposal tab, it was not displaying on the work order until the user closed and reopened it. This has been fixed.

**EDIT SERVICE RECORD**

**BIG STATE**  
777 Hollywood ST  
Los Angeles, CA 90038

**CREATED BY**  
David Navarro on 3/5/23 3:00 am

**ORDER REASON**  
PLEASE LOCK AFTER DUMPING COMBO: 2022 \*\*\*LT'S ACCOUNT\*\*\*

**ACCESS**

**WORK ORDER** 5699445 **QTY** 1 **SERVICE CODE** 30 Yard Open Top Service **EQUIPMENT** 30YD **WORK TYPE** RO\_DUMPRET **ORDER TYPE** Scheduled Service

**ORDER NOTES**

**PO NUMBER** **EXTERNAL ID**

**SCHEDULED DATE** 04/19/23 Wednesday **ROUTE** DAY UNASSIGNED ROLL OFF **SEQUENCE** 0 **DESTINATION / ORIGIN**

**WORK STATUS** Scheduled **EXCEPTION REASON** **POSTING STATUS** Pending

**Charges \$ 500.00** **Source Location** **Disposal / Ship** **Payments** **Completion** **Attachments** **Inventory** **Labels** **Photos**

START DATE/TIME	END DATE/TIME	LOCATION	VEHICLE INFO	TANK	TICKET #	QUANTITY	MATERIAL	TOTAL COST
Wed Apr 19, 2023 12:0...		CHAMBERS COUN...				564.00 tons	MSW	\$ 31,020.00
Wed Apr 19, 2023 12:0...		CHAMBERS COUN...				225.00 tons	MSW	\$ 12,375.00
Wed Apr 19, 2023 12:0...		CHAMBERS COUN...					MSW	\$ 1,375.00

Pathway: Accounts > Search > Accounts

## Accounts - Disable Service Location Map For Sites That Aren't Geocoded (14278)

A change has been made to disable the Service Location Map button in Service Agreements for sites that are not geocoded.

**QA**

FORMAT 1 - PAGE 1  
FORMAT 1 - PAGE 2  
FORMAT 1 - PAGE 3

**SEND MESSAGE** **SIGN & ACCEPT** **SERVICE LOCATION MAP**

**QA Waste Services - CORPUS**  
Corpus Christi TX  
(361) 289-5588

**Exclusive co**  
business is lo

**General**

**ARRO**  
Billing Na

**43028001** **ARROW DISPLAY SIGNS**

**Active**

**DIVISION** CORPUS  
**SERVICE REGION** CORPUS OPEN MARKET  
**SALES REP** Matt Eckstrom  
**SOURCE** Cold Call

Pathway: Accounts > Search > Accounts > Service Agreements

## Customer Service (Calendar & Services Grid) - Photo Icon Visible for Any Service Record with Photos (15203, 15204) [Enhancement]

Previously, when a service record included a photo, the photo icon only displayed on the Calendar and in the Service History grid for Exceptions. Logic has been updated to display the icon for all service records a photo has been uploaded to.

The screenshot displays the 'Customer Service' interface for account 48911, 'LouLou Doctor Service'. The top section shows account details: 'Active', 'DIVISION DAYTON', 'ACCOUNT MGR', 'CLASS COMMERCIAL', 'BILL GROUP DAY-COMM MONTHLY ARREARS', 'Arrears - Monthly', and 'Billed Thru Date None'. Below this is a table with columns for 'CURRENT', '1-30', '31-60', '61-90', '91-120', '120+', and 'TOTAL', all showing '0.00'. The main section is a calendar for March 2023, with tabs for 'CALENDAR' and 'EVENTS'. The calendar shows dates from Feb 26 to Mar 22. A red arrow points to a photo icon (a camera inside a circle) on the calendar for March 7th, which is labeled '1, RMW\_SVC'. Other dates with similar icons are Feb 28, Mar 14, and Mar 22.

Pathway: Accounts > Search - Account > Calendar/Calendar List

## Site Inventory - Add/Edit Truck Field Updates (15241) [Enhancement]

The following changes have been applied to the Add/Edit Truck screen in Site Inventory:

1. **Speed UOM** has been removed.
2. **Volume Capacity** and **Weight Capacity** along with their UOM fields are no longer required to save.





44705001 | Example Site

1 of 1 name 2 Active

DAYTON  
 Job Robertson  
 FULL OFF-PERM  
 DAY-ROLF BI-WEEKLY  
 Billed Thru Date May 12, 2023

1234 S Houston Ave  
 addr 2  
 Humble, TX 77338-4818  
 +1 555-555-6036

DIVISION DAYTON  
 SERVICE REGION DAYTON OPEN MARKET  
 SALES REP Rob Robertson  
 PO NUMBER 998689  
 SOURCE Call In

**SITE INVENTORY**

Equipment <sup>6</sup> Trucks <sup>1</sup>

EQUIPMENT	QTY	SERIAL NUMBER	NOTE	LAST UPDATED
40 Yard Roll Off	1			08/08/23
42 Yard Receiver (Ser)	1	1234567	RD 2 - from yard to site	08/22/23
10 Yard FL (Ser)	1	222	added serial	08/22/23
10 Yard Roll Off	2			
10 Yard FL (Ser)	1			

**SITE INVENTORY ADJUSTMENT**

EQUIPMENT TYPE 40 Yard Roll Off

CURRENT QTY 1

NEW QUANTITY

NOTE

POST ADJUSTMENTS

Pathway: load Account/Site > Site Inventory

Related Articles: [Inventory Management](#); [Site Inventory](#)

## Service Record - New Columns Added to Payment Tab (15279)

The following columns have been added to the Payments tab in the service record:

- Batch#
- Batch Date
- Status

Charges \$ 67.00 <sup>1</sup>	Source Location	Payments \$ 111.00 <sup>1</sup>	Completion	Attachments	Labels	Photos
+						
DESCRIPTION	BATCH #	BATCH DATE	STATUS	REFERENCE	AMOUNT	NOTE
Check	10931	05/16/2023	Open	first	\$ 111.00	

Pathway: Accounts > Search Work Order > Payments Tab

## User Activities - 'Created Date' and 'Last Viewed' Times Not Matching (15505)

USER ACTIVITY				ACCOUNTS > USER ACTIVITIES			
FROM 07/01/2023	TO 07/27/2023	DIVISION CORPUS, DAYTON, HEARNI	DEPARTMENT All	USER WITH ONE/MORE ACTIVITIES <input checked="" type="checkbox"/>		VIEW Standard	Search
USER	NEW PROPOSALS/CONTRACTS	NEW PROSPECTS	APPOINTMENTS	TASKS	NOTES	EMAILS SENT	SITES VIEWED
Emily Nancy	0	0	0 / 0	0 / 0	0	1	5
Isabel Navarro	0	0	0 / 0	0 / 0	0	2	25
James Somer	0	0	0 / 0	0 / 0	0	0	1
Lori Sandy	0	0	0 / 0	0 / 0	0	30	71
Matt Ernest	0	1	0 / 0	0 / 0	4	0	0
Matthew Donny	0	0	0 / 0	1 / 0	0	24	31

## Accounts - Credit Card Payment Processing Core Changes (15094) [Enhancement]

1. A printer icon has been added to the left of each invoice to preview and print.
2. An Apply check box has been added for each invoice. When checked, the Pay Amount column will populate with the invoice amount from the Balance column. When not checked, the Pay Amount for the invoice is \$0.
3. The addition of an 'Invoice Subtotal' has been added to calculate a subtotal for both the Balance column and the Payment Amount column.
4. The previously used Deposit field has been renamed to 'Prepayment Amount' and relocated on the screen.
5. 'Allow Excluding Processing Fee on Manual Payments' has been renamed to 'Apply' followed by the fee's charge code name. In the example below, the charge code name is 'ACH Fee'.
6. A Total row has been added and is the sum of the Invoice Subtotal + Prepayment Amount + Apply Fee.

**Pathway:** *Accounts > Search: Accounts > AR History*

### Accounts - Logic Updated for Posted/Billed Service Records (15222)

Edit logic has been updated to Service Record Details for service records in a posted or billed status.

If the posting status is 'Posted' or the work order billed, the following applies:

- All fields are disabled for edits
- Service Record Charges are disabled for edits
- Source Location is disabled of Add/Edit/Delete/Link options
- Disposal is disabled of Add/Edit/Delete
- Material is disabled of Add/Edit/Delete
- Payments are disabled of Add/Edit/Delete
- Labels are disabled of Add/Edit/Void/Approve and weighing

If the posting status is 'Posted' the following **can still** be edited:

- Destruction Date
- Posting Status
- Photos can be added but not deleted.
- Attachments can be added but not deleted.

If the posting status is 'Billed' the following **CAN** be edited:

- Destruction Date

EDIT SERVICE RECORD

Example Site

12345Staffordshire Ct

West Chester, OH 45069-1901

EPA: EPA1234 / State: ST1234

PHONE

CREATED BY

David Navarro on 3/9/23 8:46 pm

ORDER REASON

ACCESS

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.

SITE NOTE

This is the note on the site.

WORK ORDER

5714908

QTY

1

SERVICE CODE

Regulated Medical Waste Service

WORK TYPE

RMW\_SVC

ORDER TYPE

Scheduled Service

ORDER NOTES

PO NUMBER

EXTERNAL ID

Scan Consolidation Batch

CONSOLIDATION BATCH

SCHEDULED DATE

03/17/23 Friday

ROUTE

DAY-601

SEQUENCE

0

DESTINATION / ORIGIN

WORK STATUS

Service Completed

EXCEPTION REASON

POSTING STATUS

Posted

Update History

Lori Sheldt on 5/25/23 1:37 pm

Lori Sheldt on 5/25/23 1:37 pm

Charges \$ 11.70

Payments

Completion

Attachments

Labels (1)

Photos

Timeline

☐ Charges must match Equipment

☐ Charges must match Material

WO MINIMUM

PRINT WORK ORDER LABELS

GROSS QTY	LABELS	NO CHARGE QTY	CHARGE QTY	UOM	CHARGE CODE	PER UNIT	VENDOR RATE	MINIMUM TYPE	MINIMUM	TOTAL
0			0	each	18 Gal Box Per Container - ...	\$ 0.00		None		\$ 0.00
0			0	each	200 Gal Cart Per Container ...	\$ 90.00		None		\$ 0.00
31	1		31	pound	30 Gal Box Per Pound - RMW	\$ 0.30		None		\$ 9.30
0			0	each	30 Gal Box Per Container - ...	\$ 43.00		None		\$ 0.00
6			6		Adjustment	\$ 0.40		None		\$ 2.40

Pathway: Accounts > Search: Work Order

## Accounts - New Bic Profile Fields Added to Edit Site (15266)

To meet regulatory reporting requirements for New York, two new fields have been added to the BIC Profile tab in the *Edit Site* screen.

- Field: Contract Type
  - Selection Options:
    - Written
    - Oral
- Field: Other Financial Requirements
  - Selection Options:
    - Yes

■ No

**EDIT SITE**

Basic Settings

Billing Settings

BIC Profile

WASTE STREAM SURVEY

No

BUSINESS TYPE

Not Selected

CONTRACT TYPE

Written

OTHER FINANCIAL REQUIREMENTS

Yes

COMMENTS

sgdgdsg

Pathway: Accounts > Search: Accounts > Edit Site (right click)

### Accounts - 'Paper Bill Fee' Should Only Display When 'Invoice By Email' Is Disabled (15521)

Previously, 'Paper Bill Fee' continued to display for accounts that had 'Invoice By Email' enabled. This has been resolved.

+

18557

CITY OF LIBERTY

90

1829 Sam Houston St  
Liberty, TX 77575-4742

Credit Hold

DIVISION DAYTON

ACCOUNT MGR House Acct non System

CLASS MUNICIPAL

BILL GROUP DAY-COMM MONTHLY ARREARS

Arrears - Monthly Billed Thru Date Oct 31, 2022

Next Invoice Date Jun 01, 2023 BATCH-25642 (not started)

OLD ID DAY-9026

INVOICE BY EMAIL Email with Attachment

TERMS Net 20

AUDITOR House Acct non System

1 of 1

ATTN: ACCOUNTS

423 COUN

DAYTON,

ACCESS

NOTE

+

18557

CITY OF LIBERTY

90

1829 Sam Houston St  
Liberty, TX 77575-4742

Credit Hold

DIVISION DAYTON

ACCOUNT MGR House Acct non System

CLASS MUNICIPAL

BILL GROUP DAY-COMM MONTHLY ARREARS

Arrears - Monthly Billed Thru Date Oct 31, 2022

Next Invoice Date Jun 01, 2023 BATCH-25642 (not started)

OLD ID DAY-9026

INVOICE BY EMAIL No Paper Bill Fee \$4.25

TERMS Net 20

AUDITOR House Acct non System

SOURCE null

REBATE PAYMENT TYPE Not Applicable

CURRENT

1-30

31-60

61-90

91-120

120+

TOTAL

Pathway: Accounts > Search > Accounts

### Accounts - Account Credit Hold Removal To Run Hourly Rather Than Daily (15265)

The logic for removing an account from a credit hold status has been enhanced to run on an hourly basis instead of daily.

Pathway: Accounts > Search > Accounts

## Edit Account - New Field Options Added for Inbound Work Orders (15347)[Enhancement]

The Edit Account screen has been updated to include two new check boxes in the Billing section:

1. Hide Work Order Format Rate
  - If selected, rates will be hidden from view on scale tickets or work orders that support printing rates.This option is also available at the Account Class level for universal application.
2. Inbound Order Auto Print

**EDIT ACCOUNT**

**NAME** Test -Leads Analysis **STATUS** Active

**NAME 2** **DIVISION** CORPUS

**ADDRESS LINE 1** 12341 Aberdeen St NE **SOURCE** Call In

**ADDRESS LINE 2** **ACCOUNT MANAGER** House Account (Invalid)

**CITY/STATE/POSTAL CODE** Blaine MN 55449-5 **ACCOUNT CLASS** ROLL OFF-PERM

**PHONE** (999) 999-9999 **AUDITOR**

**ATTN** **WEBSITE**

**BILLING PHONE** (999) 999-9999 **LOGO** Select logo... **BROWSE...**

**FAX** (999) 999-9999 **OLD ID**

**BILLING CONTACT 1** **BILLING CONTACT 2**

**PARENT ACCOUNT**

**Billing**

**BILL GROUP** COR-COMM MON ARREARS **BILL BY SITE** **AUTO STATUS UPDATE**

Arrears - Monthly Billed Thru Date Jul 17, 2023 Next Invoice Date Feb 01, 2023 BATCH-25578 (in progress) **APPLY FINANCE CHARGES**

**INVOICE BY EMAIL** No **EXCLUDE FROM PAYMENT PROCESSING FEE**

**TERM** Net 20 **EXCLUDE FROM PAST DUE NOTIFICATION**

**CREDIT LIMIT** 0 **HIDE WORK ORDER FORMAT RATE** **INBOUND ORDER AUTO PRINT**

**AP**

**DEFAULT PAYMENT METHOD** Not Applicable **PAYEE NAME** 1099

**INSTRUCTIONS**

**WARNING ON OPEN**

**SAVE**

Pathway: Accounts > Search > Accounts

## Account Request Management - Photos and Linked Items Updates (15317)[Enhancement]

The following modifications have been applied to the Account Request screen:

1. Linked Items and Photos have been separated into distinct tabs for improved organization.
2. The Photos tab now allows for the attachment of multiple photos, expanding the previous limitation of supporting only one photo per request.
3. The 'Close' button has been removed from the screen. Instead, users can close the Account Request screen by clicking on the 'X' icon after saving their changes.

ACCOUNT REQUEST

Details

Photos

Linked Items

+

DESCRIPTION	CREATED ON		DISPLAY IN ACCOUNT PORTAL	DELETE
test	07/05/2023 12:14 pm	<a href="#">View</a>	No	

ADD PHOTO

ADD PHOTO

Select photo...

BROWSE...

DESCRIPTION

DISPLAY IN ACCOUNT PORTAL

☐

UPLOAD

SAVE

DELETE

Pathway: Accounts > Account Request Management

## Accounts - Logic Updated to Notification Message Views (15409)[Enhancement]

An enhancement has been made to the Customer Details screen to display the full notification message for email and text messages when clicked on by the user.

3005			\$ 75.00 per month	10/26/21	10/22/24	...
6BB7	1x per week	F	\$ 0.00 per month	04/30/23	10/22/24	...
5B3F	Every 2 weeks	T (A Week)	\$ 125.00 per month	07/09/23	10/22/24	...

WED

THU

FRI

SAT

Jun 27

Jun 28

Jun 29

Jun 30

Jul 1

Jul 4

Jul 5

Jul 6

Jul 7

Jul 8

Jul 11

Jul 12

Jul 13

1, RO\_DUMPRET, 40YD-RO

1, RO\_DUMPRET, 40YD-RO

1, RO\_DUMPRET, 40YD-RO

(1) David Navarro

(1) David Navarro

Task Assigned

Service Reminder - Calendar - WO #6

Service Reminder - Calendar - WO #6

1, FL\_RELOCAT, 4YD, REC

(1) Lori Sheldt

QA Waste Svc Statement

WO Prepayment Notification

+8 Events..

1, FL\_MISSED, 4YD, REC

1, FL\_MISSED, 4YD, REC

1, RO\_DUMPRET, 40YD-RO

(1) Lori Sheldt

+3 Events..

1, RO\_DUMPRET, 40YD-RO

1, RO\_DUMPRET, 40YD-RO

1, RO\_DUMPRET, 40YD-RO

1, RO\_DUMPRET, 40YD-RO

+3 Events..

1, RO\_DUMPRET, 40YD-RO

1, RO\_DUMPRET, 40YD-RO

NOTIFICATION MESSAGE

Hello Lori S

This is an automated reminder that your 4 Yard Recycle Service service at 1215 S Houston Ave is scheduled for Jul 11, 2023

If you have any changes to be made, please contact the office.

NOTE this is using calendar days

Pathway: Accounts > Search: Accounts

## Accounting

## AR Payment Batch - Clearing the Search Field and Search Result in a Batch (14175)

Logic has been updated to the Batch screen to clear the search value and the search result upon entry of a payment Amount and Type.

The screenshot shows the 'BATCH - 10799 DIVISION - CORPUS' window. At the top, there are fields for DATE (01/20/2023), BANK ACCOUNT (COMERICA - FWS), AMOUNT (\$ 100.00), COUNT (1), and STATUS (Open). Below these are fields for NOTE, CREATED BY (Matthew Van Doren - 01/20/23 4:08 pm), and POSTED BY. A search bar contains the value '33026'. Below the search bar, a table lists account details for 33026: Credit Hold, \$ 649.98, CARMAX #6090, and COR-3760. At the bottom, there is a 'Search for Payment in Batch' section with a dropdown for 'Entry Order' and a search bar. Below this is a table with columns: ACCOUNT ID, NAME, STATUS, BALANCE, TYPE, REFERENCE, AMOUNT, APPLIED AMOUNT, DEPOSIT, and AUTO APPLY. The table shows two rows for account 33026, both with a 'Credit Hold' status and a balance of \$ 649.98. The first row has a 'Check' type and a reference of 2222. The second row has a 'Check' type and a reference of 1234. The AMOUNT column shows 100.00 for the second row. The APPLIED AMOUNT column shows 0.00 for both rows. The DEPOSIT and AUTO APPLY columns have checkboxes. The table also includes 'Apply', 'Edit', and 'Delete' icons for each row.

Pathway: Accounting > AR Payment Batch

## Adjustment History and Pending Approval - Adjustment Approval Button Fix (15095)

Previously, when a user selected the green check mark to approve an adjustment, the Confirmation window did not display and the Division filter would revert back to 'All'. This has been fixed.

The screenshot shows the 'ADJUSTMENT HISTORY AND PENDING APPROVAL' window. At the top, there is a 'DIVISION' dropdown set to 'CORPUS'. Below this are two tabs: 'Pending Approval' (with a red notification badge) and 'History'. The 'History' tab is active, showing a table with columns: DIVISION, ACCOUNT, ACCOUNT NAME, INVOICE, AMOUNT, REASON CODE, DATE, and USER. The table has one row for 'CORPUS' with account '33002', account name 'WOOLDRIDGE APA...', invoice '845933', amount '\$(58.26)', reason code 'COURTESY', date '03/13/23', and user 'Aliena Somers'. There is an 'Edit' button and a green checkmark icon next to the user name. A 'CONFIRMATION' dialog box is open in the foreground, asking 'Are you sure you want to approve this Adjustment?' with 'YES' and 'NO' buttons. A red arrow points to the green checkmark icon in the table row.

Pathway: Accounting > Invoice Adjustment - Pending Approval and History

## AR Payment Batch - "Deposit Date" Labels Changed (15108)

The following Deposit Date labels have been changed in the AR Payment Batch screen:

1. The 'Deposit Cleared Date' header has been changed to 'Bank Cleared Date'.
2. Right click on batch - 'Add Deposit Cleared Note' has been changed to 'Add Bank Cleared Note'.
3. Add Note popup displays 'Blank Cleared Note' that replaces 'Deposit Cleared Note'.

☒ Open 1 \$ 60.50   
 ☒ Voided 0 \$ 0.00   
 ☒ Posted 17 \$ 636.20   
 Search

BANK ACCOUNT	BANK CLEARED DATE	COUNT	TOTAL	CREATED ON	GL BATCH
COMERICA - FWS		2	\$ 1.00	04/05/2023 2:52 pm	
COMERICA - FWS		1	\$ 0.00	04/05/2023 8:41 pm	
COMERICA - FWS		1	\$ 10.01	04/06/2023 5:00 pm	
COMERICA - FWS					
COMERICA - FWS					
COMERICA - FWS					
COMERICA - FWS					

Add Bank Cleared Note   
 Canadian Payment Batch Export  
 COMERICA - FWS

ADD NOTE

BANK CLEARED NOTE

SAVE

Pathway: Accounting > AR Payment Batch

## AR Payment Batch - Screen Updates (15107)

The following updates were applied to the AR Payment Batch editing tool:

1. A Deposit check box has been added to indicate the money received was entered as a deposit. The Deposit column is hidden if the user does not have permission 267 (Post Deposit).
2. If the Deposit box is checked, the Auto Apply check box is disabled.
3. A green pencil icon has been added to add a note for the payment. It is recommended to enter a note with the deposit so when it is changed to a payment at a later time the user has reference it started as a deposit.

BATCH - 10847 DIVISION - DAYTON

DATE: 03/01/2023   
 BANK ACCOUNT: COMERICA - FWS   
 AMOUNT: \$ 92.00   
 COUNT: 3   
 STATUS: Posted

NOTE:    
 CREATED BY: Lori Sheldt - 03/09/23 5:09 pm   
 POSTED BY: Lori Sheldt - 04/17/23 3:04 pm

Double click on search result to add payment

ACCOUNT ID	STATUS	BALANCE	ACCOUNT NAME	SITE ID	SITE NAME	PREVIOUS ID

SORT: Entry Order ↓   
 Search for Payment in Batch

ACCOUNT ID	NAME	STATUS	BALANCE	TYPE	REFERENCE	AMOUNT	APPLIED AMOUNT	DEPOSIT	AUTO APPLY	
30479	Misty Baxter	Bad Debt	\$(1.62)	Check	631 dep	55.00	53.38	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
26034	SUNLAND CONSTRUC...	Active	\$ 1,197.00	Credit Card	564654	22.00	0.00	<input type="checkbox"/>	<input type="checkbox"/>	Apply
48910	Liberty Hospital	Credit Hold	\$ 198.85	Check	2112	15.00	0.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>	

Pathway: Accounting > AR Payment Batch

## Payment Batch - Default Payment Type Added (15603)[Enhancement]

A new "Default Payment Type" feature has been added to Payment Batch. By selecting a default payment type, new payments for the batch will default to the type selected. If a default is not selected for the batch, the user must select the type each time a payment is added.



This feature defaults to null/blank.

**BATCH - 11017 DIVISION - DAYTON**

DATE: 08/09/2023 BANK ACCOUNT: TBD AMOUNT: \$ 0.00 COUNT: 0 STATUS: Open

NOTE: CREATED BY: Aliena Somers - 08/09/2023 3:05 pm POSTED BY:

Search for Account/ Site Double click on search result to add payment

DEFAULT PAYMENT TYPE: ACH

ACCOUNT ID	STATUS	BALANCE	ACCOUNT NAME	SITE ID	SITE NAME	PREVIOUS ID
------------	--------	---------	--------------	---------	-----------	-------------

SORT: Entry Order ↓ Search for Payment in Batch

ACCOUNT ID	NAME	STATUS	BALANCE	TYPE	REFERENCE	AMOUNT	APPLIED AMOUNT	DEPOSIT	AUTO APPLY
48954	Test -Leads Ana...	Active	\$ 25.00	ACH	1234	0.00	0.00	0.00	0.00

Pathway: Accounting > AR Payment Batch

## Billing - One Time Fee Per Invoice Added as Billing Option (14180)

A new late fee billing option 'One Time Fee Per Invoice' has been added to the Finance Charge Type field in Account Class.

**UPDATE ACCOUNT CLASS**

Details Portal / Payment Processing

NAME: COMMERCIAL

ACTIVE: Yes

TYPE: Business

GL ACCOUNT: Accounts Receivable

GL SEGMENT: 12000

DEFAULT ACCOUNT CREDIT LIMIT: 0

DEFAULT ACCOUNT TERM: Net 20

DEFAULT REBATE PAYMENT TYPE: Not Applicable

DEFAULT BILL BY SITE: No

CREATE CONTACT DEFAULT: Account

DEFAULT CONTACT SERVICE NOTIFICATION: Yes

GEOCODING TYPE: Roof Top

GEOFENCE RADIUS (METERS): 30

NEW ACCOUNT NOTIFICATION TEMPLATE:

REQUIRE GENERATOR TYPE: No

ENABLE LINKING CONTACTS TO ALL SITES: Yes

LOAD ACTIVE ACCOUNTS IN PIPELINE MAP: Yes

REQUIRE BILLING CONTACT: No

Status Management

ENABLE AUTOMATIC STATUS UPDATE: Yes

AUTO CREDIT HOLD PAST DUE DAYS: 55

AUTO CREDIT HOLD MINIMUM PAST DUE AMOUNT: 25.00

AUTO INACTIVE ACCOUNT/SITE DAYS: 120

AUTO CREDIT HOLD PLACEMENT: Yes

AUTO CREDIT HOLD REMOVAL: Yes

STATUS UPDATE TIME: 11 PM

Pacific Standard Time

RUN DAILY AUTO APPLY: No

Finance Charges / Late Fees

FINANCE CHARGE TYPE: One Time Fee Per Invoice

RATE: 15.00

CHARGE CODE: Late Fee

CHARGE MINIMUM: 10.00

PAST DUE MINIMUM: 5.00

APPLY FIN. CHARGE FROM DAYS: 10

Saved.

Pathway: Setup > Account > Account Class

## Unapplied Management - Retain Grid Position Upon Returning to Screen (14302)[Enhancement]

The Unapplied Management screen has been improved to return the user back to the same location in the list after clicking on the customer and viewing the Customer Service screen.

UNAPPLIED MANAGEMENT						
DIVISION	ACCOUNT CLASS	BILL GROUP	AUDITOR			
DAYTON	All	All	All	Count 789	-152,721.20	Search
DATE	TYPE	AMOUNT	APPLIED	ACCOUNT	CURRENT	
	Check 995042			20732		
02/11/2022	Payment Check 995054	-80.00	0.00	RUST DAVID 20732	-1,259.25	
04/15/2022	Payment Check 995079	-89.00	0.00	RUST DAVID 20732	-1,259.25	
05/14/2022	Payment Check 995090	-89.00	0.00	RUST DAVID 20732	-1,259.25	
07/15/2022	Payment Check 995106	-89.00	0.00	RUST DAVID 20732	-1,259.25	
08/12/2022	Payment Check 995116	-89.00	0.00	RUST DAVID 20732	-1,259.25	
10/11/2022	Payment Check 27926573	-75.00	0.00	JAMES FARMER 20784	-75.00	
07/20/2022	Payment Check 770025849	-100.00	95.75	WELLS MARTIN 20850	-4.25	
10/25/2022	Payment Check 228555	-284.18	280.16	DAYTON LEASE SERVICES 20877	-4.02	
09/30/2022	Payment Check 2913	-120.00	110.59	MALAK CHAROL & JESSE 20916	-9.41	
09/02/2022	Payment Check 997941	-132.30	122.39	NANCY WALDRIP 20942	-9.91	
10/10/2022	Payment Check 5170	-58.48	57.79	STANDARD MANUFACTURING CO. 20959	-0.69	
01/18/2022	Payment Check Michael	-100.00	46.21	DUNCAN DEANA 20995	-53.79	
08/29/2022	Payment Check 2913263587	-100.00	70.82	HOLCOMB TRACI 21001	-29.18	

Pathway: Accounting > Unapplied Management

## Credit Card and ACH Reconciliation - Credit Card Refund Records (15142)

An issue has been resolved that prevented Credit Card and ACH refunds from being reflected in the Credit Card/ACH Reconciliation screen. In addition, 'Refund' has been added to the list of options in the Source drop down.

CREDIT CARD / ACH RECONCILIATION						
SALE - APPROVED			SALE - VOID		SALE - DECLINED	
REFUND - APPROVED 1 / \$ 7.35						
START DATE	END DATE	DIVISION	GATEWAY	PAYMENT TYPE	SOURCE	
04/19/23	04/26/23	CORPUS, DAYTON, HEARNE, HILL	All	Bank Account, Ame	Refund	LOAD
PAYMENT BATCH	DATE	NAVUSOFT ID	MERCHANT ID	ACCOUNT	PAYMENT TYPE	
10900 (04/20/2023)	04/20/2023 8:51 am	178350	123456	Liberty Hospital (48910)	Visa - 1111 Exp. 04/2024	

Pathway: Accounting > Credit Card and ACH Reconciliation

## Billing - Future Rate Increase Field Added to Billing Screen (15307)

The Billing screen under Results now includes the 'Future Rate Increase' feature for affected accounts and sites following a rate update batch. By clicking the displayed number, users can access a list of customers included in the batch. Additionally, the Message box allows users to enter a message that will be displayed on each invoice, notifying customers about the upcoming rate change.

Pending and In Process

History

+

DIVISION

All

Search

Q

↻

BILL GROUP	DIVISION	BATCH ID	TYPE	STATUS	INVOICE DATE	FROM-TO DATE	INVOICE COUNT	PRINT COUNT	NOTIFICATION COUNT	AUTO PAY ENROLLED	AUTO PAY PROCESSED	INVOICES WITH MESSAGE	AMOUNT
COR-COMM MON ARREARS	CORPUS	25578	Scheduled	Processed	02/01/2023	02/01/2023 - 02/28/2023	1		1				\$ 5.42
COR-COMM MON ADVANCE	CORPUS	25508	Scheduled	Posted	12/01/2022	12/01/2022 - 12/31/2022	614	608	5	297 / 4			\$ 202,053.06
DAY-COMM MONTHLY ARRE...	DAYTON	25642	Scheduled	Processed	06/01/2023	06/01/2023 - 06/30/2023	3	1	4	2 / 0			\$ 774.93
DAY-COMM MONTHLY ADVA...	DAYTON	25539	Scheduled	Not Started	01/01/2023	01/01/2023 - 01/31/2023	164						\$ 0.00
DAY-ROLF BI-WEEKLY	DAYTON	25632	Scheduled	Posted	02/01/2023	02/01/2023 - 02/15/2023	25		1	2 / 0	2		\$ 19,362.23
COR-Q1-JAN-APR-JUL-OCT	CORPUS	25537	Scheduled	Processed	03/01/2023	10/01/2022 - 03/01/2023	1,752	1,751	1	812 / 15			\$ 173,613.03
DAY-RESI MONTHLY ADVANCE	DAYTON	25637	Scheduled	Not Started	02/01/2023	02/01/2023 - 02/28/2023							\$ 0.00
HOU-COMMERCIAL ARREARS	HOUSTON	25600	Scheduled	Processed	03/01/2023	02/01/2023 - 02/28/2023	525	524	1	339 / 18			\$ 148,563.46
DAY-Q2-FEB-MAY-AUG-NOV	DAYTON	25634	Scheduled	Not Started	02/01/2023	02/01/2023 - 04/30/2023							\$ 0.00

RESULTS

Credit Limit Exceeded

0

Inactivity Fees

0 - \$ 0.00

Finance Charges / Late Fees

0 - \$ 0.00

Blanket PO Warnings

0

Future Rate Increase

1

AUTO

TREND ANAL

FUTURE RATE INCREASE INVOICES

INVOICE #	ACCOUNT ID	ACCOUNT NAME	SITE ID	SITE NAME	AMOUNT
872806	48910	Liberty Hospital			\$ 678.65

MESSAGE

Adding in link

SAVE

CANCEL

Pathway: Accounting > Billing

## Operations

### Dispatch - Logic Update to the Start Date Field in Add Disposal / Ship Record and Add Route Disposal (14284) [Enhancement]

Default logic has been added to the **Start Date** field on the Service Record's *Add Disposal / Shipment* screen and to the route's *Add Route Disposal* screen to populate using the route date.

DISPATCH

FROM

TO

DIVISION

LINE OF BUSINESS

04/03/23

04/03/23

DAYTON

Roll Off

Standard

Select Route Sheet

ROUTE

TRUCK

DRIVER

PRE TRIP

Monday, Apr 3, 2023 (0 of 3)

SERVICES LIST

EDIT SERVICE RECORD

WORK ORDER	QTY	SERVICE CODE	EQUIPMENT	WORK TYPE	ORDER TYPE
5619797	1	40 Yard Open Top Service	40YD-RO	RO_DUMPRET	Scheduled Service

ADD DISPOSAL / SHIPMENT

START DATE

START TIME

END DATE

END TIME

DESTINATION / ORIGIN

TANK

04/03/23 Mon

12:00 AM

TRANSPORT METHOD

TRUCK

VEHICLE INFO

EXTERNAL TICKET #

STATUS

Completed

MATERIAL

WEIGHT IN

WEIGHT OUT

UOM

QTY

MIN QTY

DISPOSAL RATE

FEE 1

FEE 2

TOTAL COST

0

NOTES

Ticket Image

#### Pathways:














Operations > Dispatch > open Services List > open Edit Service Record > select Disposal / Ship tab

Operations > Dispatch > select value from Disposal column

## Dispatch - Optimization Hyperlink Added to Dispatch Screen (15034)[Enhancement]

A hyperlink to view optimization results has been added to the Dispatch screen for routes where optimization was successfully run. Status displays have also been updated in the Optimized column and will display as follows:

- **Optimization Running** - displays to indicate the optimization job is still processing.
- **View Optimization Results** - displays to indicate the optimization job is complete. Select the hyperlink to view the results.
- **Last Optimization Failed** - displays to indicate the optimization job failed in its attempt to optimize the route(s).
- **Last Optimization Rejected** - displays to indicate the user reviewed and rejected the optimization results.

DISPATCH									
FROM		TO		DIVISION		LINE OF BUSINESS			
03/29/23		03/29/23		CORPUS,		Commercial			
Standard		Select Route Sheet							
<input type="checkbox"/>	ROUTE	TRUCK	DRIVER	PRE TRIP	POST TRIP	OPTIMIZED	SCHEDULED		
Wednesday Mar 29, 2023 ( 0 of 13 Completed)									
<input type="checkbox"/>	  COR 201	951	Moses Espinoza - Driver		<a href="#">View Optimization Res...</a>	120			
<input type="checkbox"/>	  COR 202	952	Rudy Espinoza - Driver			101			
<input type="checkbox"/>	  COR 203	953	Marco Hurtado - Driver			131			
<input type="checkbox"/>	COR DUMPSTER DEL/REM					1			
<input type="checkbox"/>	 DAY 201	971	Perry Evans - Driver			101			
<input type="checkbox"/>	 DAY 202	972	Curtis Thulin - Driver			76			
<input type="checkbox"/>	 DAY 203	905	Albert Taylor - Driver			61			
<input type="checkbox"/>	DAY CO SUB OUT								
<input type="checkbox"/>	  HOU 201	2003	William Trejo - Driver		<a href="#">Last Optimization Reje...</a>	14			
						108			

Pathway: Operations > Dispatch

## Dispatch - Display of Lunch Hours in Services List (15035)

An issue has been resolved with the display of lunch hours in the Services List screen. Lunch hours display upon hovering over the site if lunch hours were created.

SERVICES LIST

Dispatch

Select Print Format

SET POSTING

EDIT

PRINT COMPLETED

<input type="checkbox"/>	ROUTE	SEQ ↑	ORDER NOTE	LOCATION	SCHEDULED DATE ↑	CREATED ON	WO#	WO TYPE	SERVICE TYPE
<input type="checkbox"/>	DAY-601	10 6:00 a...		48911001 Example Account 1 1234 Navu Rd, West Ches...	Wed 4/5/23	2/19/23 3:00am	5631498	Scheduled Service	Scheduled RMW Servi
<input type="checkbox"/>	DAY-601	20 6:10 a...		48910001 * Example Account 2 2222 Court, West Chester	Wed 4/5/23	3/9/23 8:46pm	5714904 *	Scheduled Service	Scheduled RMW Servi
<input type="checkbox"/>	DAY-601	30 6:32 a...		48907001 Example Account 3 3333Business Way, t	48910001 *	<div>Site Note: This is the note on the site. Access: 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. Business Hours: Weekdays 3:00 AM to 7:00 PM Lunch 12:00 PM to 12:30 PM</div>			

Pathway: Operations > Dispatch > Services List

## Dispatch - Assigned Truck Changes (15091)

Logic has been updated in Dispatch to refresh and display truck assignment changes if the driver has selected a different truck in NavuNav. Additionally, the Route Production view in Dispatch will display the mileage the driver logged at the start of the route.

Pathway: Operations > Dispatch

## Dispatch - UOM Value Updated for Disposal Column (15032)

Logic has been updated to the Disposal column to use Rate UOM.

DISPATCH

FROM

TO

DIVISION

DISPATCH

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Pathway: Operations > Dispatch

## Route Management (Current tab)- Import and Export Buttons Require 445 Permission (15197) [Enhancement]

Permission 445 (Import/Export Current Routes From Route Management) has been added to Permission Setup to restrict user access to the Import/Export features on the Current tab of the Route Management screen (Operations). Import/Export buttons are hidden from view for users not assigned the 445 permission.

This permission requires manual authorization in Setup > System > Role.

Pending

Current

Re-Number

DAYTON

ATASCA OAKS, ATASCA WOC

Commercial, Residential

DAY 101, DAY 102, D

Tuesday, Monday, Wed

LOAD

EXPORT

IMPORT

NAVISOFT FILE FORMAT

ROUTESMART FILE FORMAT

Standard

EDIT

MAP

Route Summary

	LOCATION	QTY	SERVICE CODE	FREQ / NEXT SVC
<input type="checkbox"/>	30246002	1	4 Yard Trash Service	1x per week

Pathway: Operations > Route Management; Setup > System > Permission

## Route Management - Save Logic Updated (15048)[Enhancement]

The Current tab in Route Management has been updated to use auto-save logic when a route is updated. This replaces the previously available 'Save Routing Change' button. After edits are complete, select the 'Post Routing Change' button and the changes will be posted to the route.

Pending

Current

Re-Number

DAYTON

ATASCA OAKS, ATASCA WOC

al, Roll Off, Residential

DAY 101, DAY 102, D

Monday

LOAD

EXPORT

IMPORT

Standard

EDIT

MAP

Route Summary

SERVICE CODE FILTER

Hand Throw, 2 Yard Tri

SEARCH

	LOCATION	QTY	SERVICE CODE	FREQ / NEXT SVC	ROUTE	SEQ	DOW	NEW ROUTE	NEW SEQ	NEW START DATE	NEW WEEK
	48587001 KELLY KAPUR 777 Country Street Dayton, TX 77535-3331	1	Hand Throw MSW	2x per week 06/12/23 Week 24 (A)	DAY 101	0	Mon				
	26027001 SAM ALLEN 333 Flower Road DAYTON, TX 77535	1	Hand Throw MSW	2x per week 06/12/23 Week 24 (A)	DAY 101	0	Mon				
	48744001 Jason Paul 44 State Side Street Dayton, TX 77535-3397	1	2 Yard Trash Service 2 Yard RL MSW	1x per week 06/12/23 Week 24 (A)	DAY 101	0	Mon				
	26296002 REBECCA STANLEY 555 Good Lane Dayton, TX 77535	1	Hand Throw MSW	2x per week 06/12/23 Week 24 (A)	DAY 101	0	Mon				
	19031001 DEBORAH DORA 222 COUNTRY STREET DAYTON, TX 77535	1	Hand Throw MSW	2x per week 06/12/23 Week 24 (A)	DAY 101	40	Mon				
	27436001 HANNAH MARY	1	Hand Throw	2x per week 06/12/23	DAY 101	50	Mon				

POST ROUTING CHANGE

Pathway: Operations > Route Management > Current (tab)

## Dispatch - Edit Route Record Downtown (15189)

Logic has been updated to the Reason Code drop down field, in the Add Downtime editor, to only display reason codes designated as 'Down Time'.

EDIT ROUTE RECORD DOWNTIME

+

DRIVER

TRUCK

NOTE

ADD DOWNTIME

TRUCK

771

DRIVER

Isabel Navarro

START TIME

END TIME

REASON CODE

NOTE

Flat Tire


SAVE

SAVE

Pathway: Operations > Dispatch

### Dispatch - Modifications to Route Format 2 (15187)[Enhancement]

Route Format 2 has been updated to include a list of Stops and Quantity based on Equipment Type.



QA Login

Route ALVARO

Tue May 9, 2023

ROUTE SHEET TOTALS

Stops	Service Quantity	Scheduled Volume (cubic yard)	
4	4	137	

Equipment Summary	Stops	Quantity
25 Yard Compactor	1	1
30 Yard Roll Off	1	1
40 Yard Roll Off	1	1
42 Yard Receiver	1	1

WORK HOURS

Driver Name

Signature

Route Start

Lunch Start

Lunch End

Route End

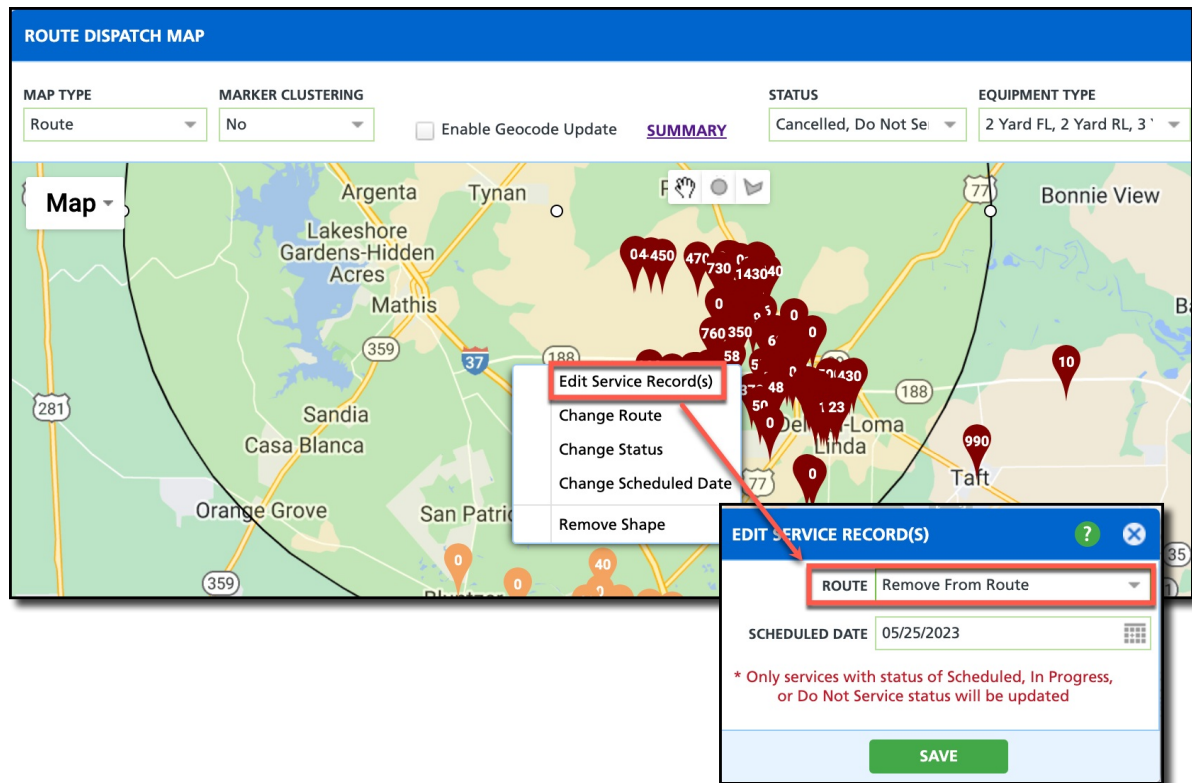
Pathway: Operations > Dispatch

### Dispatch - Unassign Route from a Stop (15287)

The issue that prevented stop removal from both the Route Dispatch Map and the Services List in Dispatch has been resolved.

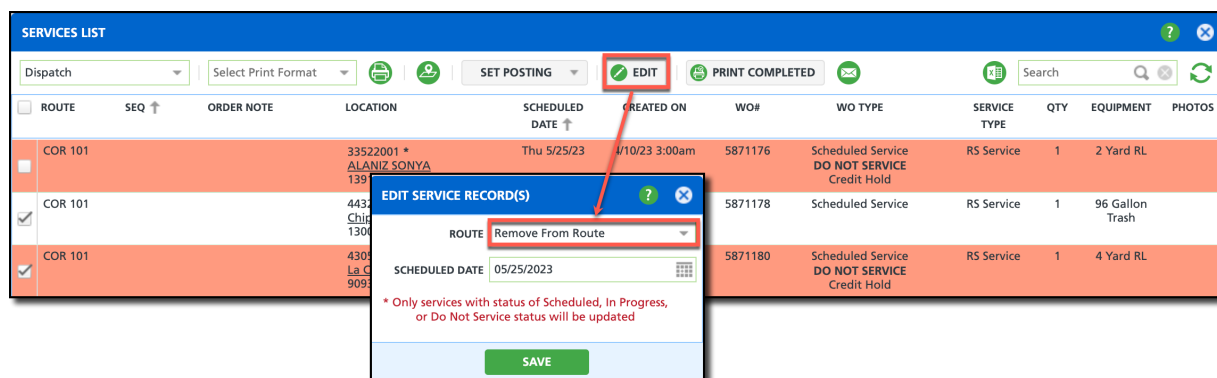
## Route Dispatch Map

Create a radius around the locations you want to remove from the route. Right click anywhere within the radius to open Edit Service Records. Select Remove From Route and then Save.



## Services List

Select the Route from the Dispatch screen to open the Services List. From the Services List, select the service locations you would like to remove and click Edit to open the Edit Service Record(s). Select Remove From Route and then click on Save.



Pathway: Operations > Dispatch

## Dispatch - Optimization Override Field Added to Start Route Optimization (14977)[Enhancement]

A new "Optimization Override" field has been added in the "Start Route Optimization" feature of Dispatch. This field allows users to override both the Line of Business route optimization settings and RouteSmart's route optimization settings. If the field is not populated, the optimization override for the Line of Business is used. If the Line of Business does not have an optimization override populated, RouteSmart's (third party integration) settings

are used.

DISPATCH

FROM

06/14/23

TO

06/14/23

DIVISION

CORPUS, DAYTON, HEARNE, HILLSBORO, HOUSTON, QAWASTE

Standard

Select Route Sheet

ROUTE

TRUCK

Wednesday Jun 14, 2023 ( 0 of 1 )

COR 201

COR 202

COR 203

COR 205

COR DUMPSTER DEL

DAY 201

DAY 202

DAY 203

DAY CO SUB OUT

START ROUTE OPTIMIZATION

TYPE

Optimize Routes

START LOCATION

Route Starting Yard

END LOCATION

Route Ending Yard

OPTIMIZATION

Use LOB Default

Override

Commercial

Rear Loader

Side Loader

Don't make Disp

START

Pathway: Operations > Dispatch

Dispatch (Route Optimization) - Optimization Ignored Site Business Hours When Run on Future Date (15642)

An issue has been resolved that caused Route Optimization to ignore site business hours if optimization was run on a future date.

41902001 | Example Site 1

1 of 1

2222 Navu Cir

Corpus Christi, TX 78411

+1 555-555-0841

ACCESS

NOTE

Active

DIVISION

CORPUS

SERVICE REGION

CORPUS OPEN MARKET

SALES REP

House Account

PO NUMBER

123456

SOURCE

Cold Call

GENERATOR

Not Applicable

TAX REGION

NUECES COUNTY-CORPUS CHRISTI MTA

TAX EXEMPT

No

SIGNATURE REQUIRED

Yes

LEED REPORTABLE

No

BUSINESS HOURS / SERVICE WINDOW

Weekdays

6:00 AM to 4:00 PM

Pathway: Site Information (Customer Service Screen); Operations > Dispatch > Route Optimization

Dispatch - Record Truck Mileage When Record Does Not Exist (15304)[Enhancement]

An Enhancement has been made to the Route Productivity view in Dispatch to allow users the ability to record truck mileage when a mileage record does not exist. To support this, new 'Start Time' and 'End Time' fields were added to the Add Mileage editor.

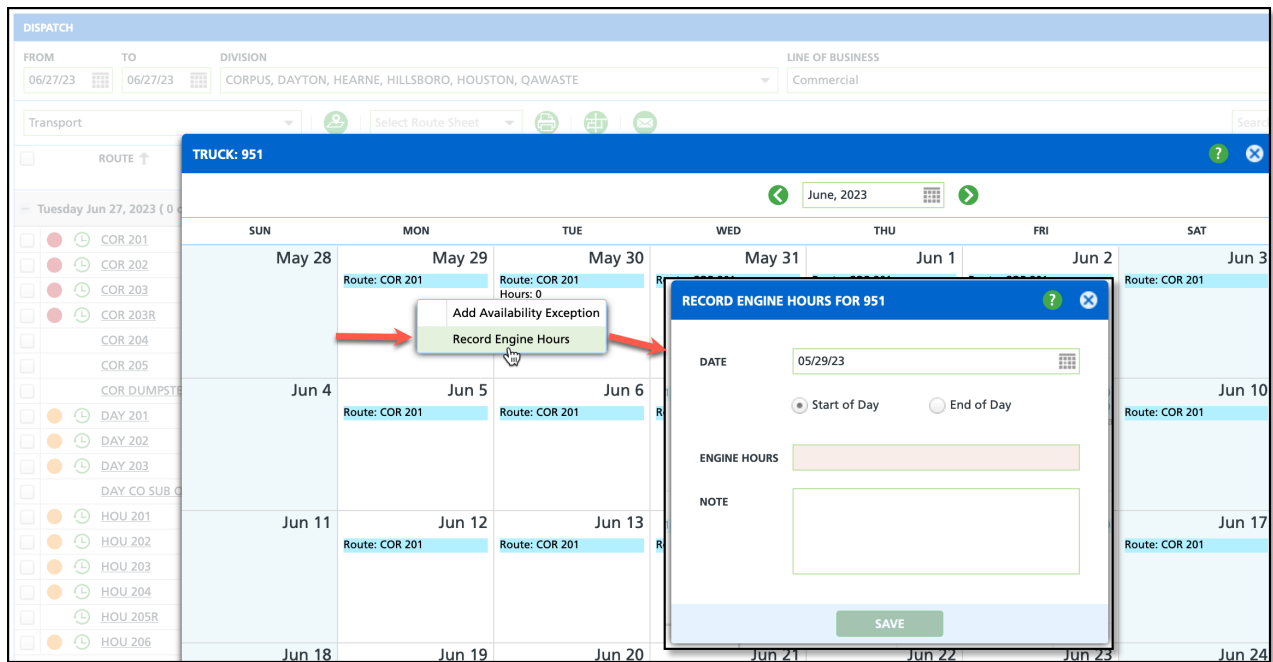


**Pathway:** *Operations > Dispatch - Route Productivity view*

New functionality has been added to the Truck calendar screen to record engine hours. To add an engine hours record:

1. Click on the truck ID from the Dispatch screen to display the truck's calendar.
2. Right click on the date you would like to add an the engine record to and the **Record Engine Hours** editor will display.
3. Verify the **Date** is correct.
4. Select the **Start of Day** radio button and enter the engine hours the truck started with.
5. Select the **End of Day** radio button and enter the engine hours the truck ended the day. This number should be larger than the number entered for Start of Day.
6. Optional: add a note.
7. Click **Save** when finished.





Pathway: Operations > Dispatch > select Truck ID

## Dispatch - Add Ability To Set Default Driver, Truck and Help (15559)

An enhancement has been made within Dispatch, you can now set or update the default driver, truck or helpers when editing a route record. If the assigned truck, driver or helpers differ from the route defaults the user now has the ability to select 'Set as Default' and save. This will update the route defaults moving forward.

EDIT ROUTE RECORD

TRUCK

970

SET AS DEFAULT

DRIVER

Matthew Van Doren - Admin - NS

SET AS DEFAULT

HELPER 1

SET AS DEFAULT

HELPER 2

SET AS DEFAULT

MILES

START TIME

END TIME

STATUS

Scheduled

DISPOSAL LOCATION

TRANSPORTER

START YARD

END YARD

SAVE

Pathway: Operations > Dispatch

## Work Type Setup (Operations) - New Setting Added to Work Type for NavuNav (15561) [Enhancement]

The following changes have been made to the Add Work Type screen in Work Type Setup:

1. The 'Work Type' tab has been renamed to 'Details.'
2. A new 'NavuNav Settings' tab has been added.
  - NavuNav settings previously available in the Details tab have been moved to the NavuNav Settings tab.
3. A new 'Return To Route List On Completion of WO' setting was added in NavuNav Settings.
  - If enabled, the driver will be returned to the route list after completing the work order in the Stop Details screen.

The screenshot shows the 'WORK TYPE SETUP' interface. At the top, there's a 'LINE OF BUSINESS' dropdown set to 'Roll Off'. Below this is a table with columns: ID, NAME, LOB, ACTION CATEGORY, INVENTORY MOVE TYPE, MANIFEST NOTIFICATION, ORDER BASELINE SECONDS, DEFAULT SECONDS PER UNIT, CREATE ONE SERVICE RECORD PER QUANTITY, and ENAB... DISPO... MATER... ENTRY. The table lists various work types like DUMPNLY, RETURNBOX, RO\_DELIVER, etc. A modal window titled 'ADD WORK TYPE' is open, showing two tabs: 'Details' (highlighted with a red circle 1) and 'NavuNav Settings' (highlighted with a red circle 2). The 'Details' tab contains settings for 'ENABLE DRIVER PHOTO PROMPT', 'ENABLE DRIVER ENTERED LABEL WEIGHTS', and 'ENABLE DRIVER TO SET IN PROGRESS', all set to 'No'. The 'NavuNav Settings' tab contains a new setting 'RETURN TO ROUTE LIST ON COMPLETION OF WO' set to 'No' (highlighted with a red circle 3). At the bottom of the modal is a 'SAVE' button. The background table also has columns for 'Alerts' and 'Surcharges' at the bottom left, and 'NOTIFICATION TYPE' and 'NOTIFICA' at the bottom right.

Pathway: Setup > Operations > Work Type > select to Add Work Type

## Sales

### Rate Update Batch - Column Changes (15132)

The following changes have been applied in the Rate Update Batch tool:

- **Created Date** column has been updated to display the time below the date. Date was also updated to display as a 2 digit year.
- **Posted Date** was updated to display the year as 2 digits.
- **Posted User** was moved under **Posted Date** in the column header and the user's name who posted the batch will display under the date.
- An **Effective Date** column has been added to the screen for the date the rate begins being applied.

RATE UPDATE BATCH										
SERVICE REGION		TYPE		STATUS						
ATASCA OAKS, ATASCA WOODS, ATASCOC		All		All		Search				
ID	DIVISION	SERVICE REGION	LINE OF BUSINESS	TYPE	CREATED DATE	EFFECTIVE DATE	STATUS	POSTED DATE/ POSTED USER	INC. / ENC.	NOTE
1001	DAYTON	OAKS OF ATASCOCITA	Residential	Service	08/06/21 4:57 pm	08/31/21	Posted	08/06/21 4:59 pm Ted Broster	828 / 0	
1002	HOUSTON	PEARLAND MUNICIPAL	Commercial	Service	10/27/21 8:40 am	09/30/21	Posted	10/27/21 8:44 am Ted Broster	1567 / 0	All City of Pearland services are no charge
1003	DAYTON		Commercial	Service	12/31/21 7:34 am	12/31/21	Posted	12/31/21 7:52 am Bill Killian	846 / 0	Annual City of Liberty increase, see letter BK
1004	CORPUS	CORPUS OPEN MARKET	Roll Off	Svc. Charge	01/03/22 8:29 am	12/31/21	Posted	01/03/22 8:36 am Bill Killian	247 / 0	CEFE Valenzuela 1/1/22 rate increase as notified
1005	DAYTON			Service	02/28/22 12:58 pm	03/31/22	Voided		134 / 0	Forgot to add billgroup filter
1006	DAYTON			Service	02/28/22 1:01 pm	03/31/22	Posted	03/07/22 9:37 am Ted Broster	134 / 0	PI Effective 4/1/2022
1007	DAYTON	OAKS OF ATASCOCITA		Service	05/06/22 10:15 am	05/31/22	Posted	05/06/22 10:31 am Bill Killian	803 / 0	Contractually allowed via 2019 agreement signed. BK
1008	DAYTON			Service	06/29/22 3:03 pm	06/30/22	Posted	07/05/22 3:43 pm David Navarro	345 / 0	PRICE DECREASE 25.00 PER NEW CONTRACT

Pathway: Sales > Rates Update Batch

### Rate Update Batch - Screen Update (15341)

Rate Update Batch has been updated to display 'selected' behind the selection value at the bottom of the screen to indicate the amount of records currently selected. Previously, 'pending' displayed after the value.

SITE SERVICE CHARGE RATE UPDATE BATCH: 1016										
NET VARIANCE \$12.50										Search
<input type="checkbox"/>	ID	SITE ID	NAME	CITY	CHARGE CODE	CURRENT RATE	NO CHARGE QUANTITY	NEW RATE	VARIANCE	BILLED DA
<input checked="" type="checkbox"/>	38921	46981001	TRAVEL INN & SUITES	Humble	Front Load 08YD Extra Pi...	\$ 125.00	0	\$ 137.50	\$ 12.50	
<input type="checkbox"/>	38922	46719001	Tiger Harry's Riverside Fish Camp	Liberty	Front Load 08YD Extra Pi...	\$ 75.00	0			
<input type="checkbox"/>	38923	46823001	Myra Lopez	Porter	Front Load 02YD Extra Pi...	\$ 75.00	0			
<input type="checkbox"/>	38924	23524001	PLC CONSTRUCTION	LIBERTY	Front Load 06YD Extra Pi...	\$ 75.00	0			
<input type="checkbox"/>	38925	47156001	FEDEX GROUND	Houston	Front Load 08YD Extra Pi...	\$ 65.00	0			
<input type="checkbox"/>	38933	45447002	Applebees	Crosby	Front Load 08YD Extra Pi...	\$ 65.00	0			
<input type="checkbox"/>	38934	46835001	FAMILY DOLLAR	HUMBLE	Front Load 04YD Extra Pi...	\$ 65.00	0			
<input type="checkbox"/>	38935	46834001	Dollar Tree	Humble	Front Load 04YD Extra Pi...	\$ 65.00	0			
<input type="checkbox"/>	38936	47856001	His Presence Church	Humble	Front Load 06YD Extra Pi...	\$ 65.00	0			
<input type="checkbox"/>	38937	48346001	SUNBURST TRUCK LINES	Houston	Front Load 06YD Extra Pi...	\$ 65.00	0			
<input type="checkbox"/>	38938	48346001	SUNBURST TRUCK LINES	Houston	Front Load 04YD Extra Pi...	\$ 65.00	0			
EXPORT						78 records	1 selected	78 visible	CLOSE	

Pathway: Sales > Rate Update Batch

### Exception Analysis - New Screen Available (15270)[Enhancement]

A new screen 'Exception Analysis' has been added to the Sales module in Core. Exception Analysis is used for internal sales purposes to review accounts that have had repeated service exceptions and identify if a new service, or change in service, should be offered.

Follow the Exception Analysis article linked below for more information on how to use this new feature.

EXCEPTION ANALYSIS

SALES > EXCEPTION ANALYSIS

DIVISION

All

PERIOD

Last 120 Days

SALES REP

All

LOAD

Search

Q

SITE	SALES REP				EXCEPTION COUNT	OPEN LEADS	OPEN PROPOSALS
John Doe ( 27050001)	House Acct non System				2	6	1
T.D.C.J. - PLANE UNIT ( 26509001)	House Account				3	0	0
	STATUS	REASON	DATE	WORK ORDER #	QTY	SERVICE CODE	
	Service Completed	Blocked	03/08/2023	5495267	1	40 Yard Open Top Service	
	Service Completed	Box Left in Yard	03/29/2023	5595906	1	40 Yard Open Top Service	
	Service Completed	Roll Off Overloaded	03/31/2023	5608461	1	40 Yard Open Top Service	
Jack and Hammer Builders ( 42762003)	House Account				1	1	1
FIRE PROTECTIVE SERVICES ( 33003001)	Rob Tellez				1	0	0
Navu Distributing ( 42762002)	Rob Tellez				1	2	0

Pathway: Sales > Exception Analysis

Article Link: [Exception Analysis](#)

## Rate Update Batch - Exclude service from Update Batch If User Manually Edits Service (15633) [Enhancement]

Rate Update Batch has been updated to display an error if a site included in the batch update has a future services change. Hover over the record to display the tooltip for the error.

SITE SERVICE RATE UPDATE BATCH: 1021									
GRID VIEW					EFFECTIVE DATE				
Standard		NET VARIANCE \$500.00			08/17/2023		Search		
<input type="checkbox"/>	SITE ID	NAME	CITY	SERVICE CODE	CURRENT RATE	NEW RATE	VARIANCE	CURRENT WO MINIMUM	NEW WO MINIMUM
<input checked="" type="checkbox"/>	0				\$ 91.25	\$ 191.25	\$ 100.00		
<input type="checkbox"/>	0				\$ 0.00	\$ 100.00	\$ 100.00		
<input checked="" type="checkbox"/>	0				\$ 0.00	\$ 100.00	\$ 100.00		
<input checked="" type="checkbox"/>	0				\$ 0.00	\$ 100.00	\$ 100.00		
<input checked="" type="checkbox"/>	0				\$ 0.00	\$ 100.00	\$ 100.00		
<input checked="" type="checkbox"/>	0				\$ 0.00	\$ 100.00	\$ 100.00		

Pathway: Sales > Rate Update Batch

## Rate Update Batch - Rate Update Batch Details Added Grid View Enhancements (15553, 15565)

Enhancements have been made within the Rate Update Batch Details that include:

1. **Grid View** was updated to include an "Extended" view option. When selected, additional columns such as Account ID, Account Name, Account Class and Bill Group are displayed.
2. An **Effective Date** field has been added, allowing the user the ability to edit the effective date of an open batch. Effective Date is read-only for batches not in an "Open" status.

SITE SERVICE CHARGE RATE UPDATE BATCH: 1020

GRID VIEW  
Extended

CHANGE TYPE  
%

AMOUNT  
0.0000

APPLY

NET VARIANCE \$0.00

EFFECTIVE DATE  
07/25/2023

Search

ACCOUNT ID	ACCOUNT NAME	SITE ID	NAME	CITY	CHARGE CODE	CURRENT RATE	
<input type="checkbox"/>	31831	ABELS PAVING	31831012	ABELS PAVING	CORPUS CHRISTI	Roll Off Haul	\$ 400.00
<input type="checkbox"/>	31831	ABELS PAVING	31831013	ABELS PAVING	CORPUS CHRISTI	Roll Off Haul	\$ 400.00
<input type="checkbox"/>	31831	ABELS PAVING	31831013	ABELS PAVING	CORPUS CHRISTI	Roll Off Haul	\$ 400.00
<input type="checkbox"/>	31831	ABELS PAVING	31831017	ABELS PAVING	CORPUS CHRISTI	Roll Off Haul	\$ 400.00
<input type="checkbox"/>	31831	ABELS PAVING	31831013	ABELS PAVING	CORPUS CHRISTI	Roll Off Disposal Per Ton	\$ 37.25
<input type="checkbox"/>	31831	ABELS PAVING	31831012	ABELS PAVING	CORPUS CHRISTI	Roll Off Disposal Per Ton	\$ 37.25
<input type="checkbox"/>	31831	ABELS PAVING	31831013	ABELS PAVING	CORPUS CHRISTI	Roll Off Disposal Per Ton	\$ 37.25
<input type="checkbox"/>	31831	ABELS PAVING	31831017	ABELS PAVING	CORPUS CHRISTI	Roll Off Disposal Per Ton	\$ 37.25
<input type="checkbox"/>	31831	ABELS PAVING	31831017	ABELS PAVING	CORPUS CHRISTI	CCMSW FEE	\$ 15.14
<input type="checkbox"/>	31831	ABELS PAVING	31831013	ABELS PAVING	CORPUS CHRISTI	CCMSW FEE	\$ 15.14
<input type="checkbox"/>	31831	ABELS PAVING	31831013	ABELS PAVING	CORPUS CHRISTI	CCMSW FEE	\$ 15.14
<input type="checkbox"/>	31831	ABELS PAVING	31831012	ABELS PAVING	CORPUS CHRISTI	CCMSW FEE	\$ 15.14
<input type="checkbox"/>	31847	BEECROFT SITES	31847024	BEECROFT SITES	PORT ARANSAS	Roll Off Haul	\$ 500.00
<input type="checkbox"/>	31847	BEECROFT SITES	31847024	BEECROFT SITES	PORT ARANSAS	Roll Off Delivery	\$ 250.00
<input type="checkbox"/>	31847	BEECROFT SITES	31847054	BEECROFT	Robstown	Roll Off Haul	\$ 250.00
<input type="checkbox"/>	31847	BEECROFT SITES	31847010	BEECROFT SITES	CORPUS CHRISTI	Roll Off Haul	\$ 200.00
<input type="checkbox"/>	31847	BEECROFT SITES	31847053	Beecroft	Corpus Christi	Roll Off Haul	\$ 159.00
<input type="checkbox"/>	31847	BEECROFT SITES	31847049	Beecroft Sites	Corpus Christi	Roll Off Haul	\$ 155.00

EXPORT
IMPORT
951 records / 0 selected / 951 visible
POST
VOID
CLOSE

Pathway: Sales > Rate Update Batch

## Rate Update Batch - Contract Expiration Date Hyperlink To Contract (15522)

Within the Rate Update Batch Details, the Contract Expiration date is now a hyperlink that, when clicked, will open and allow viewing of the associated contract.

SITE SERVICE CHARGE RATE UPDATE BATCH: 1020

GRID VIEW

Standard

CHANGE TYPE

%

AMOUNT

0.0000

APPLY

NET VARIANCE

\$0.00

EFFECTIVE DATE

07/25/2023

Search

ENT RATE	NO CHARGE QUANTITY	NEW RATE	VARIANCE	CURRENT WO MINIMUM	NEW WO MINIMUM	CONTRACT EXPIRATION	ACCOUNT CLASS	BILL GROUP	SERVICE REGION
.00	0					11/06/2022	ROLL OFF-TEMP	COR-ROLF BI-WEEKLY	CORPUS OPEN MARKET
.00	0						ROLL OFF-TEMP	COR-ROLF MONTHLY	CORPUS OPEN MARKET
.00	0					12/11/2022	ROLL OFF-TEMP	COR-ROLF BI-WEEKLY	CORPUS OPEN MARKET
.00	0								
.00	0					10/21/2022			
.00	0					01/19/2023			
.00	0					12/10/2022			
.00	0					11/25/2022			
.00	0					04/29/2023			
.00	0								
.00	0					04/29/2023			
.00	0					11/30/2022			
.00	0								
.00	0					01/03/2023			
.00	0					01/03/2023			
.00	0								

EXPORT

IMPORT

EDIT SERVICE CONTRACT - SIGNATURE (NEW) - 3428

Settings

Services 1

History 9

Attachment

Master Agreement

ACCOUNT 48354

DOCUMENT FORMAT

Service Contract - signature (

DOCUMENT TYPE

New Customer

STATUS

Sold

SOURCE

Employee

10/06/2022

SALES REP

Revan Silva (Sale

SOLD BY

Revan Silva (Sale

FORM CONTACT

Steve Burg 0

Linked Leads (0)

TITLE

PO NUMBER

EFFECTIVE DATE

10/06/2022

DELIVERY DATE

10/06/2022

ESTIMATED CLOSE DATE

10/06/2022

CLOSE PROBABILITY

Medium

TERM

Month to Month

RENEWAL TERM

Month to Month

PRINT EST. SURCHARGE

No

PRINT EST. TAX

No

GROUP METHOD

Site

MULTIPLE START DATES

PRINT EST. WO CHARGES

NOTE

\$565 plus tax includes the delivery, one haul with up to 5 tons (\$45.15 per ton over 5). There will be a \$3 daily rental fee. We will take the flat rate up front plus tax (\$715.88) and will charge the additional charges after the container is emptied.

DELIVERY INSTRUCTION

PAYMENT REQUIRED AT CUSTOMER SIGNATURE

Not Required

CUSTOM FIELD1 TEXT

NO AGREEMENT FOUND

UPLOAD PROPOSAL PDF.

Pre-Authorization is required. Please contact your sales manager.

SAVE

PRINT


EMAIL

Pathway: Sales > Rate Update Batch

## Setup

### User Setup - Logic Update to Screen Sorting (14522)

User Setup screen sort logic has been updated to sort by ID upon open.

USER SETUP								
		DEPARTMENT	All		HIDE INACTIVE		<input checked="" type="checkbox"/>	
ID ↑	STATUS	FIRST NAME	LAST NAME	EMAIL	PHONE	OFFICE PHONE	TITLE	DEPARTMENT
2	Active	David					Admin-NS	Admin
3	Active	Michael					Tech Guy	
5	Active	Aliena					Admin-NS	Admin
6	Active	CT					Admin - NS	Admin
7	Active	Matthew					Admin - NS	Admin
8	Active	Dereck					Terminated-NS	Admin
9	Active	Brad					NS Admin	Admin
12	Active	Holley					Director of Im...	
13	Active	Dave					Support Analyst	
21	Active	Pat					Project Mana...	

Pathway: Setup > System > User

### Service Code Setup - Selections For Pricing Model Changed (14384)[Enhancement]

Different pricing models are available in the Pricing Models drop down on the Add Service Code screen. For more information including the setup process, submit a ticket request to Navusoft.



ADD SERVICE CODE

Service Code

SERVICE CODE		ACTIVE	Yes
NAME		ENABLE ROUTING	No
LINE OF BUSINESS		REQUIRE FREQUENCY	Yes
EQUIPMENT TYPE		ENABLE DRIVER UPDATE	No
MATERIAL TYPE		ENABLE ACCOUNT SIGNATURE	No
UOM		ENABLE DRIVER SIGNATURE	No
TAXABLE	No CLASS	ENABLE WORK ORDER MINIMUM	No
GL ACCOUNT		ENABLE RENTAL FEE	No
PRORATION METHOD	Calendar Days - Start and End	ENABLE DEFAULT DESTINATION	No
BILL WHILE ON CREDIT HOLD	Yes	ENABLE NEGATIVE AMOUNT	No
IS AP TRANSACTION	No	ENABLE ESTIMATES TRACKING	No
EST MONTHLY VOL UOM		ENBL EQUIPMENT OWNERSHIP	No
IS SHELL	No	ENABLE SHARE	No
PRICING MODEL	<div> <div>None</div> <div>None</div> <div>Target Pricing (Weight Class)</div> <div>Round Trip Distance</div> <div>Work Order Volume Tiered</div> </div>	ENABLE VENDOR	No
CALCULATE RATE PER YARD		ENABLE SITE SERVICE CLASS	No
CALCULATION METHOD		ENABLE DISCOUNTS	No
WORK TYPE EVENT CLASS		COMPOSITION MATERIAL CLASS	
BILL ZERO AMOUNT	No		

SAVE

Pathway: Setup > Services > Service Code

### Bill Group Setup - New 'Invoice With Aging' Available (15024)[Enhancement]

A new invoice format, "Invoice With Aging," has been added to the invoice options available in Bill Group Setup.



**Invoice format testing**  
8100 Washington Ave  
Houston, TX 77007

**INVOICE #** 856526  
**AMOUNT** 311.37  
**ACCOUNT #** 48935  
**DATE** Mar 17, 2023  
**QUICK PAY CODE** 9152C  
**DUE** Net 20

**MAKE ALL CHECKS PAYABLE TO:**



QA Waste Services  
PO Box 260310  
Corpus Christi, TX 78426  
PHONE: [REDACTED]

For proper credit return this portion

Site 48935001 - Invoice format testing - 8100 Washington Ave Houston TX 77007 PO#						
DATE	DESCRIPTION	WO #	PO #	QTY	UNIT RATE	TOTAL
03-17-23	Reinvoice Fee - Notes from manual charge		Manual Charge PO#	2.00	4.95	9.90
03-17-23	Front Load Delivery	5756307		1.00	100.00	100.00
03-17-23-03-31-23	8 Yard Recycle Service			1.00	300.00	135.52
	Fuel Surcharge-Commercial					42.89
					<b>Tax</b>	23.06
					<b>Site Total</b>	311.37

**NOTES AND COMMENTS**

Invoice Message  
This is the message at the billgroup.

**INVOICE TOTAL** 311.37

	2023-04-10	Check	-50.00
adjustment notes	2023-03-17	Adjustment	-0.99

**INVOICE BALANCE** 260.38

Previous Amt Due	Payments	Current Charges	Adjustments	Total Due
0.00	0.00	311.37	0.00	311.37

Total balance due includes current charges, however, may not reflect recent payments in transit.

Pathway: Setup > Accounting > Bill Group

### Accounting (Setup) - New Setting in Bill Group Setup (15563)[Enhancement]

A new 'Enable Automatic Billing Batch Creation' field has been added to the Add/Edit Bill Group screen. If disabled, ('No' is selected) upon completion of a batch, a new batch is automatically created.

ADD BILL GROUP

Settings

Notifications

ID

ACTIVE

Yes

NAME

DIVISION

TYPE

FREQUENCY

INVOICE FORMAT

BILLING EXPORT FORMAT

ACCOUNT PORTAL URL

INVOICE MESSAGE

MESSAGE DUE IN PAST 1-30 DAYS

MESSAGE DUE IN PAST 30-60 DAYS

MESSAGE DUE IN PAST 61-90 DAYS

MESSAGE DUE IN PAST 91 DAYS

CUSTOM 1

CUSTOM 2

INVOICE EMAIL FROM

PRINT SEQUENCE

Invoice Number

INVOICE LOGO

Select Image

BROWSE...

UPLOADED INVOICE LOGO

INVOICE LOGO 2

Select Image

BROWSE...

UPLOADED INVOICE LOGO 2

WORK ORDER HEADER TEXT

SURCHARGE HEADER TEXT

FINANCE CHARGES TEXT

Finance Charges

BILLING AUTO PAY PROCESS DATE

SCHEDULED AUTO PAY TIME

12:00 AM

PAPER BILL FEE CHARGE CODE

PAPER BILL FEE (PER INVOICE)

MINIMUM INVOICE AMOUNT TO BE NOTIFIED

0.00

MINIMUM ACCOUNT BALANCE TO BE NOTIFIED

0.00

ONE INVOICE PER PO#

No

DISABLE AUTOMATIC BILLING BATCH CREATION

No

SAVE

Pathway: Setup > Accounting > Bill Group

## Bill Group - New Print Sequence Option Added (15167)[Enhancement]

A new Print Sequence option 'Postal Code and Account ID' has been added to Add/Update Bill Group.

UPDATE BILL GROUP

Settings

Notifications

ID

112233

ACTIVE

No

NAME

Test

DIVISION

DAYTON

TYPE

Arrears

FREQUENCY

Every 2 Weeks

INVOICE FORMAT

Format 17

BILLING EXPORT FORMAT

Format 1

ACCOUNT PORTAL URL

INVOICE MESSAGE

MESSAGE DUE IN PAST 1-30 DAYS

MESSAGE DUE IN PAST 30-60 DAYS

MESSAGE DUE IN PAST 61-90 DAYS

MESSAGE DUE IN PAST 91 DAYS

CUSTOM 1

CUSTOM 2

INVOICE EMAIL FROM

PRINT SEQUENCE

Invoice Number

Invoice Number

Account Number

Mail to Address

Invoice by Account Name

Postal Code and Account ID

INVOICE LOGO

UPLOADED INVOICE LOGO

INVOICE LOGO 2

UPLOADED INVOICE LOGO 2

WORK ORDER HEADER TEXT

SURCHARGE HEADER TEXT

FINANCE CHARGES TEXT

Finance Charges

BILLING AUTO PAY PROCESS DATE

Invoice date

SCHEDULED AUTO PAY TIME

12:00 AM

PAPER BILL FEE CHARGE CODE

PAPER BILL FEE (PER INVOICE)

MIN AMOUNT TO BE PRINTED

0.00

ONE INVOICE PER PO#

No

Central Standard Time

Saved.

Pathway: Setup > Accounting > Bill Group

