

Release Version 70 [Archive]

Last Modified on 04/09/2026 7:33 am PDT



The release notes in this article correspond to release version 70. Screens and logic may have changed in newer versions.

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

Expand All Sections

Collapse All Sections

Home Screen

Navu Request - Add Date Range Filters To History Tab (15371)[Enhancement]

An improvement has been implemented in Navu Requests, now featuring a "Created Within" filter within the History tab.

The screenshot shows the 'NAVU REQUESTS' interface with the 'History' tab selected. A dropdown menu for 'CREATED WITHIN' is open, showing options: 'Last 30 Days', 'Last 60 Days', 'Last 90 Days', and 'Date Range'. The table below lists request details.

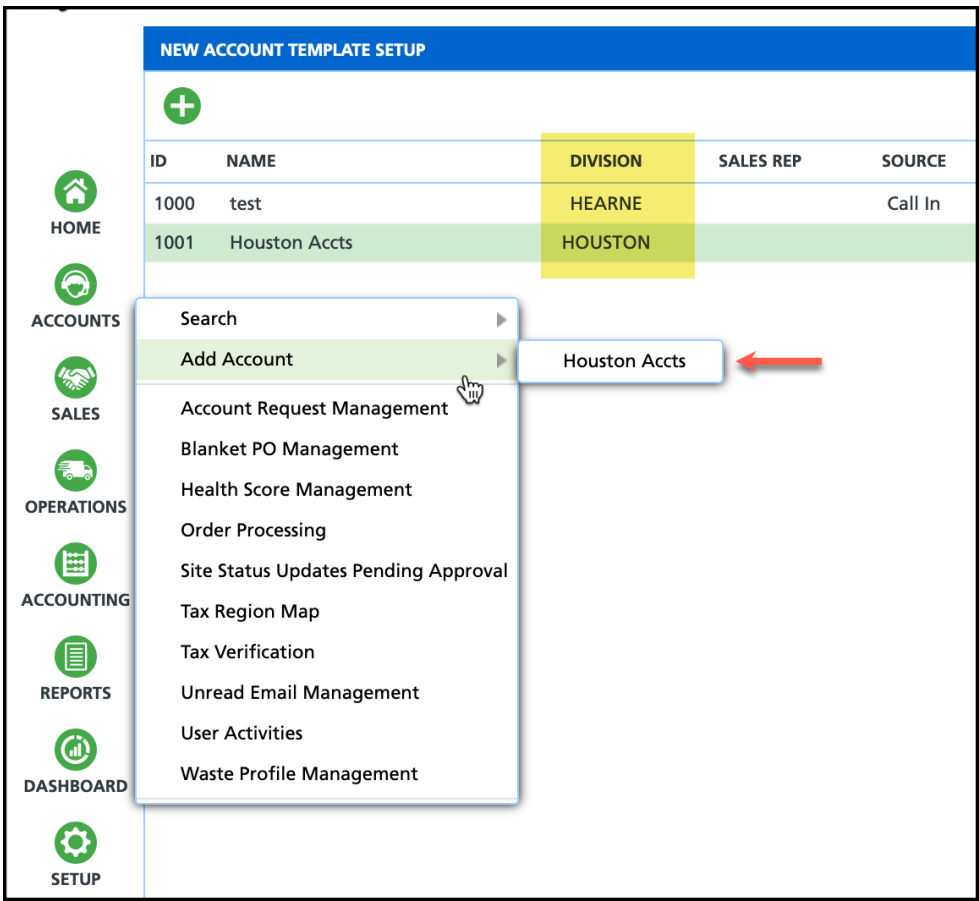
REQUEST ID	USER	CREATED DATE	TYPE	USER	MODULE	SCREEN	SUMMARY
15372	M	06, 23	Documentation	■ ■	Operations		Material Type
15373	M	14, 23	Documentation	■ ■ ■	Setup		Material Type
15626	M	06, 23	Documentation	■ ■ ■	Setup		Charge Code
18541	Aug 16, 23 8:27am	Aug 18, 23	Documentation	■ ■ ■	Sales		extended grid view for

Pathway: *Navu Requests*

Accounts

Add Account - Account Templates Logic Updated (14307)[Enhancement]

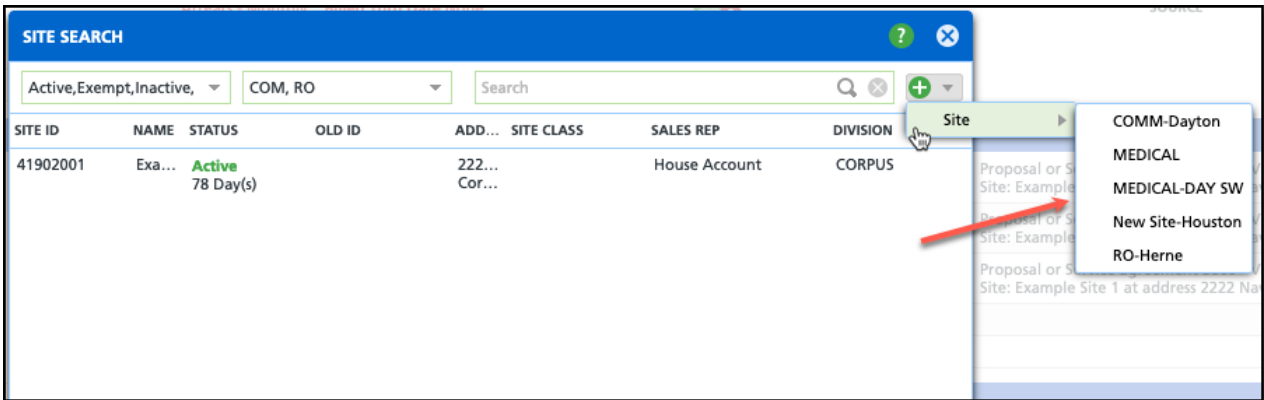
Logic has been updated to the Add Account Templates to restrict access based on the user's division access (assigned on their user account). If the template does not have a division assigned, it will continue to be visible to all users.



Pathway: *Accounts > Add Account*

Add Site - Logic Updated to New Site Template (15685)[Enhancement]

Logic has been updated to the 'New Site Template' to restrict access based on the user's division access (assigned on their user account). If the template does not have a division assigned, it will continue to be visible to all users.



Pathway: (Setup) *Setup > Account > New Site Template; (Use) load Account > Site Search*

Accounts (Contracts and Agreements) - Logic Update to Require Deposit Amount Field (14219)

The "Require Deposit Amount" field on the Add Proposal screen has been renamed to "Payment Required at Customer Signature" and has been updated to include the following options:

- Not Required
 - Customer and Sales Rep can sign the contract without collection of a deposit.
- Specific Amount

- Upon signing, the customer will be required to enter a payment using either a bank account or credit card.
- One Month Recurring Fees Including Taxes and Surcharges
 - System calculated based on the monthly service rate, and includes taxes and surcharges that apply.
- One Month Recurring Fees
 - System calculated based on the monthly service rate.
-

ADD PROPOSAL

ACCOUNT 41902 / Example Account 1

DOCUMENT FORMAT: Proposal | DOCUMENT TYPE: | STATUS: Open | SOURCE: |

SALES REP: House Account (House Accou) | SOLD BY: Aliena Somers (Adm)

TITLE: | PO NUMBER: |

EFFECTIVE DATE: 08/25/2023 | DELIVERY DATE: 08/25/2023 | ESTIMATED CLOSE: 08/25/2023

TERM: |

PRINT EST. SURCHARGE: No | PRINT EST. TAX: No | GROUP: Site

NOTE: |

DELIVERY INSTRUCTION: |

ELECTRONIC SIGNATURE

ELECTRONIC SIGNATURE By signing below, you are
 (i) agreeing to the change in service described in the Service Agreement below,
 (ii) acknowledging receipt of the current Terms and Conditions accompanying the Service Agreement, and
 (iii) agreeing to be bound thereto.

PLEASE SELECT SIGNATURE METHOD Sign Type

NAME: | TITLE: |

PAYMENT REQUIRED: \$10.00

TYPE: |

NAME: |

MAKE A PAYMENT

SUBMIT CLEAR CLOSE

PAYMENT REQUIRED AT CUSTOMER SIGNATURE

Not Required

Not Required

Specific Amount

One Month Recurring Fees Including Taxes And Surcharges

One Month Recurring Fees

Order Processing/Edit Service - Date and Label Discrepancy Between Work Order and Order Processing Screen (15585)

An issue has been resolved that caused a discrepancy between the date and label displayed on the Order Processing screen and what appeared on the work order when a service was edited.

08/01/23 12:58pm **WALMART (#2439) - DAY-525**
 House Account 8700 N HIGHWAY 146, BAYTOWN

Previous: 1 30 Yard Open Top Service On Call \$ 0.00 per month N/A
 New: 2 15 Yard Open Top Service On Call \$ 0.00 per month N/A

Delivery Work Order: 08/01/2023 WO delivery - qty 2
 Removal Work Order: 04/01/2021 WO removal - qty 1

Change Posted
 Date: 08/01/23 01:00pm
 By: Lori Sheldt

REASON CODE: CHG-Service Increase START DATE: 08/01/23 Tuesday Week 31 (B)

QTY: 2 EQUIPMENT: 15 Yard Roll Off SERVICE CODE: 15 Yard Open Top Service FREQUENCY: On Call PER UNIT: 0.0000 SERVICE FEES: 0.00 month

RENT FREE DAYS: DAILY RATE:

REQUESTED BY:

RO Removal ROUTE: DAY 301 DATE: 04/01/21 Thursday

WORK ORDER NOTES:

RO Delivery ROUTE: DAY 301 DATE: 08/01/23 Tuesday

DELIVERY WORK ORDER NOTES:

Map

Pathway: (Load) Accounts > Edit Service

Add Site - Logic Updated to New Site Template (15685)[Enhancement]

Logic has been updated to the 'New Site Template' to restrict access based on the user's division access (assigned on their user account). If the template does not have a division assigned, it will continue to be visible to all users.

SITE SEARCH

Active,Exempt,Inactive, COM, RO Search

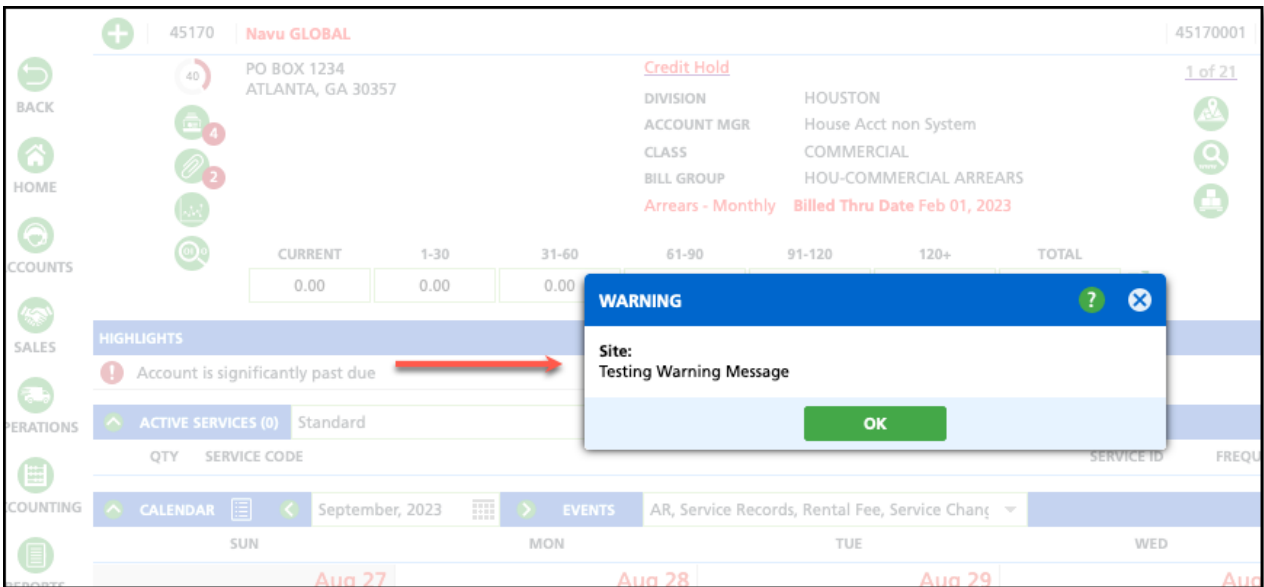
SITE ID	NAME	STATUS	OLD ID	ADD...	SITE CLASS	SALES REP	DIVISION
41902001	Exa...	Active 78 Day(s)		222...	Cor...	House Account	CORPUS

Site dropdown menu:
 COMM-Dayton
 MEDICAL
 MEDICAL-DAY SW
 New Site-Houston
 RO-Herne

Pathway: (Setup) Setup > Account > New Site Template; (Use) load Account > Site Search

Accounts - Warning Message Popup Logic Updated (15767)[Enhancement]

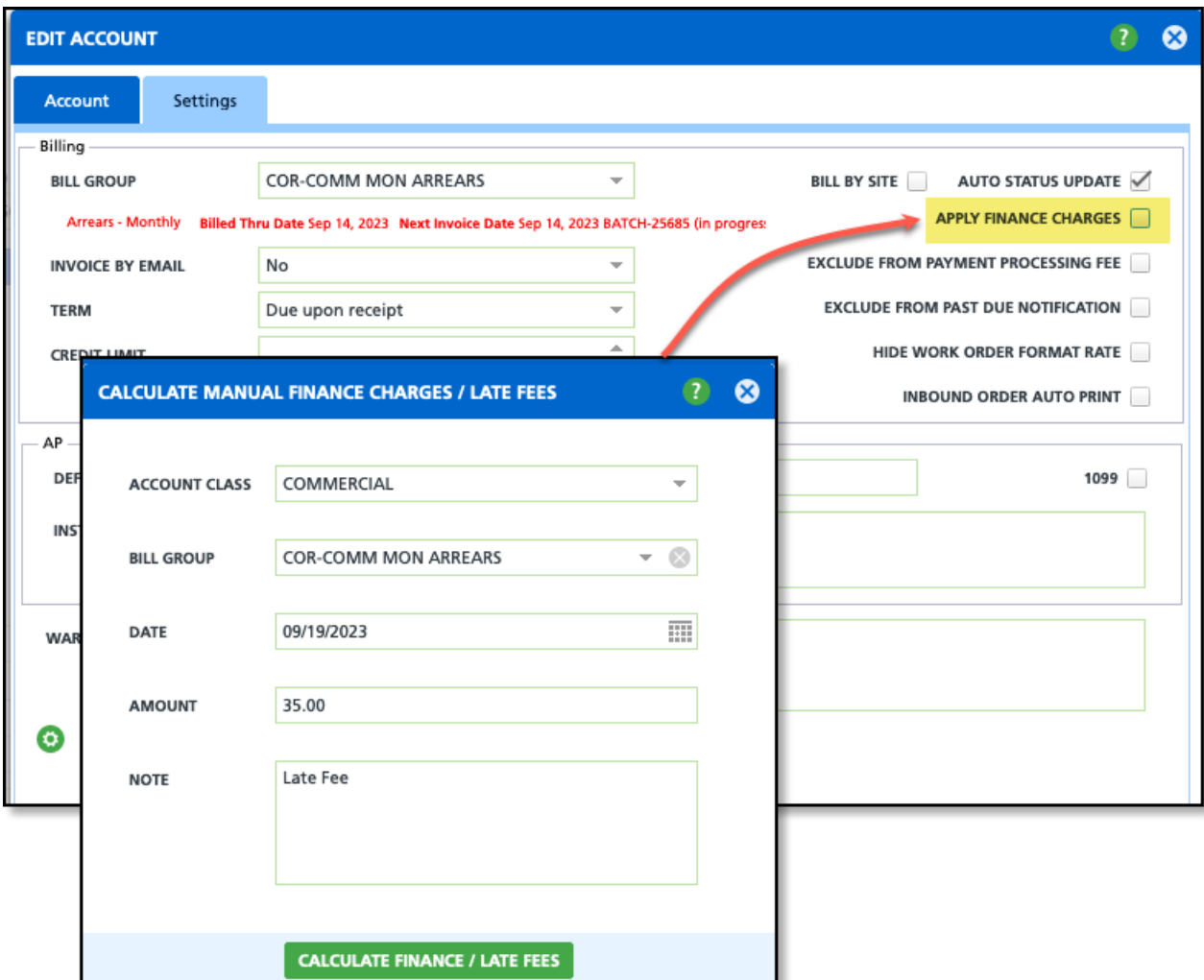
If a site includes a warning message, the popup logic has been updated to prevent the message from reappearing on the screen after user-initiated manual refreshes and system-generated refreshes.



Pathway: Customer Service Screen (Accounts)

Accounts - 'Apply Finance Charges' Logic Updated (15757)

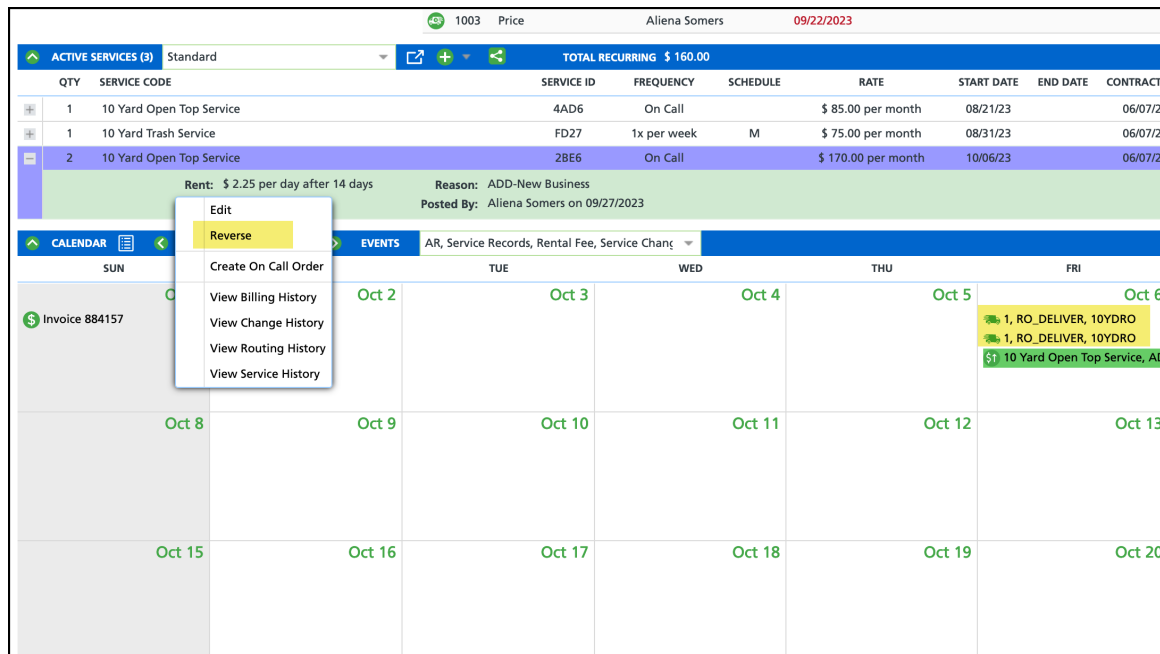
Logic has been updated to 'Calculate Manual Finance Charges and Late Fees' to correctly reference the 'Apply Finance Charges' option in an account's settings. If 'Calculate Manual Finance Charges and Late Fees' is configured, and the account does not have the 'Apply Finance Charges' option selected, no manual late fees or finance charges will be applied.



Pathway: Accounting > Calculate Manual Finance Charges and Late Fees; Accounts > Customer Service Screen > Edit Account > Settings Tab

Service Records - Reverse Logic Updated to Services with Multiple Work Orders (15689)

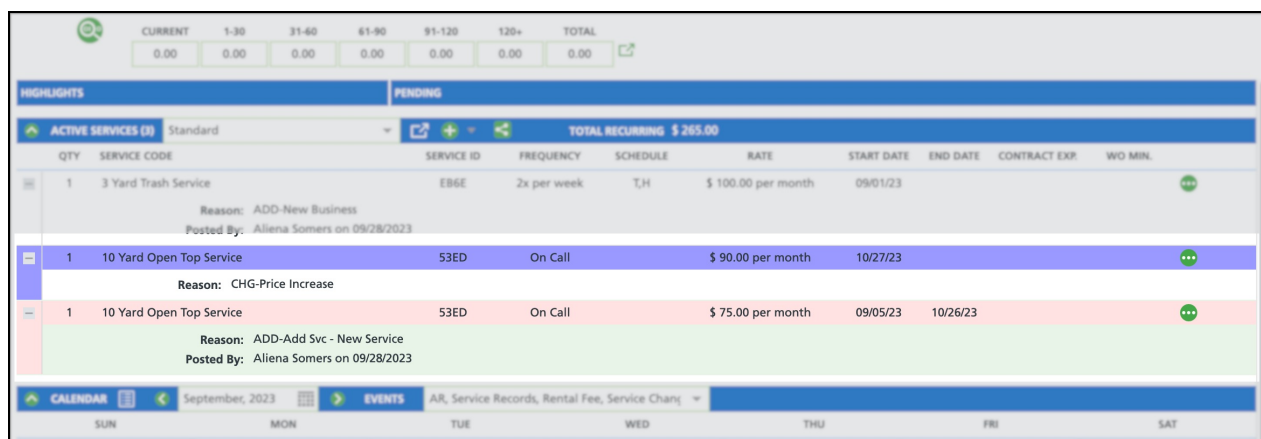
The logic has been modified to restrict a user from reversing a service if it is linked to multiple work orders, and at least one of those work orders has a status other than 'Scheduled.'



Pathway: Customer Service Screen > Right-Click on Active Service

Service Record - Logic Update for Pricing Changes with a Future Date (15837)

Previously, when there was a future change to work order charge pricing, the new pricing was being used before the effective date of the price change. This has been fixed.



Pathway: Customer Service Screen

Invoice - Address Fields Improved to Accommodate Longer Addresses (15825)

The character limit for address line 2 on invoices has been extended to 255 characters, and the Postal Code limit has been increased to 12 characters. This resolves the issue of addresses not printing on the invoice if the character limit was exceeded.

QA Waste Services

PO BOX [REDACTED]
Dayton OH 45134

First-Class Mail
U.S. Postage Paid
Mailed From Zip Code 45134
Permit # 3

RETURN SERVICE REQUESTED

Bill Date: Sep, 28 2023 Acct# 42891

Net 20
Acct# 42891 Total: \$ 323.09
Return this Stub with Payment

This is the message at the billgroup.

	Balance	31.54
03/01/23-03/31/23	Monthly Trash Svc - 96 Gallon Cart	33.00
04/01/23-04/30/23	Monthly Trash Svc - 96 Gallon Cart	33.00
05/01/23-05/31/23	Monthly Trash Svc - 96 Gallon Cart	33.00
06/01/23-06/30/23	Monthly Trash Svc - 96 Gallon Cart	33.00
07/01/23-07/31/23	Monthly Trash Svc - 96	33.00

COX CHRISTOPHER

Testing a very
lonnnnnnnngggggggggggggggggggggggg
Address Line 2
City of the Village of Clarkston MI
48346-1418

Pay your bill online at <https://navuqa-customerportal.navusoft.net/>
Quick Pay Code: 756F8 Invoice # 884158

Pathway: [Load Account](#) > [AR History](#) > [Print Invoice](#)

Tax Verification - Improvements to Screen Display (15852)[Enhancement]

The Tax Verification screen has been updated with the following changes:

1. Previous check box selections for "Verified," "Not Verified," "Failed," "Address Not Found" and "Errors" now display as a tabset.
2. A Confirmation prompt has also been added to 'Verify All' option that displays in all tabs.

The screenshot shows the 'TAX VERIFICATION' interface. At the top, there are dropdown menus for 'DIVISION' (set to HOUSTON) and 'SERVICE REGION' (set to HOUSTON OPEN MARKET). Below these is a tabset with five tabs: 'Verified (11)', 'Not Verified (485)', 'Failed (2)', 'Address Not Found (0)', and 'Errors (0)'. A 'VERIFY ALL' button is located below the tabs. The main area contains a table with columns for ID, NAME, STATUS, and ADDRESS. The table lists five entries, all with a status of 'Active'.

ID	NAME ↑	STATUS	ADDRESS
48935555 1	1234 CORTLANDT ST	Active	1234 CORTLANDT ST HOUSTON, TX 77008-7060 US
48931008	1111 CORTLANDT ST	Active	1111 CORTLANDT ST HOUSTON, TX 77008-7059 US
48931011	2222 CORTLANDT ST	Active	2222 CORTLANDT ST HOUSTON, TX 77008 US
48960001	JaneSmith	Active	123 N Main St Houston, TX 77002-1037 Harris County US
48957001	John Doe	Active	5555 Gildner St Kitchener, ON N2G 2H4 Waterloo Regional Municipality CA

Pathway: [Accounts](#) > [Tax Verification](#)

AR History - Balance Write Off Logic Update (14110)[Enhancement]

In AR History, the Reason Code drop down for Balance Write Offs has been updated to only include "Invoice

Adjustment" reason code types that also have a GL Account identified.

REASON CODE SETUP							
TYPE	LINE OF BUSINESS	REASON CODE	NAME	GL ACCOUNT	DISPLAY IN MOBILE	RESULT	EXTERNAL ID
Invoice Adjust...		BALWRT_OFF	Balance Write Off Test	Service Income:Cre...			
Invoice Adjust...	Roll Off	COURTESY	Courtesy Credit				
Invoice Adjust...		DAMAGE	Damage Credit				
Invoice Adjust...		INV_PRICE	Incorrect Price				
Invoice Adjust...		TAX_CREDIT	Tax Credit				
Invoice Adjust...		WRITE_OFF	Write Off	Service Income:Cre...			

AR HISTORY

CURRENT	1-30 DAYS	31-60 DAYS	61-90 DAYS	91-120 DAYS	120+ DAYS	TOTAL
314.59	0.00	107.60	0.00	0.00	0.00	422.19

Limit to open items |
 STATEMENT |
 INVOICE |
 AUTO APPLY |
 BALANCE WRITE OFF |
 PAYMENT METHODS (0)

DATE	DUE DATE	PERIOD	SITE ID	TYPE	REFERENCE NO	AMOUNT	APPLIED AMOUNT	BALANCE
10/01/23	10/11/23	2023-10		Invoice	884157	314.59		314.59
08/10/23	08/20/23	2023-08						107.60

BALANCE WRITE OFF

REASON CODE: Balance Write Off Test

STATUS: Write Off

NOTE:

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

OK

Pathway: Accounts > AR History

AR History - Logic and Screen Updates for Payments and Deposits (15856) [Enhancement]

The following changes have been applied to the AR History screen when (options are available upon right-click):

1. A "Convert to Payment" option has been added for received deposits, when selected, a confirmation prompt will display.
2. The "Set to Deposit" right click option that is available in the AR History for an account has been renamed to "Convert to Deposit" and the confirmation prompt has also been updated.

Convert to Payment Example

AR HISTORY

CURRENT	1-30 DAYS	31-60 DAYS	61-90 DAYS	91-120 DAYS	120+ DAYS	TOTAL
102.50	0.00	0.00	0.00	0.00	0.00	102.50

DEPOSIT AMOUNT: -15.00

Limit to open items |
 STATEMENT |
 INVOICE |
 AUTO APPLY |
 BALANCE WRITE OFF |
 PAYMENT METHODS (0)

DATE	DUE DATE	PERIOD	SITE ID	TYPE	REFERENCE NO	AMOUNT	APPLIED AMOUNT	BALANCE
10/11/23		2023-10		Payment - Check	1524	(50.00)	25.00	(25.00)
10/11/23		2023-10		Deposit - Check	1235	(15.00)	0.00	(15.00)
10/11/23	10/31/23	2023-10		Invoice		162.50	(35.00)	127.50

CONFIRMATION

Are you sure you want to convert this Deposit to a Payment ?

YES
NO

- ✉ Email
- 🖨 Print Receipt
- ↺ Reverse / Transfer / Split
- Convert to Payment

Convert to Deposit Example

The screenshot shows the AR History interface with a table of transactions. A context menu is open over a payment item, and a confirmation dialog is displayed.

CURRENT	1-30 DAYS	31-60 DAYS	61-90 DAYS	91-120 DAYS	120+ DAYS	TOTAL
-50.00	0.00	0.00	0.00	0.00	12.56	-37.44

DATE	DUE DATE	PERIOD	SITE ID	TYPE	REFERENCE NO	AMOUNT	APPLIED AMOUNT	BALANCE
10/09/23		2023-10		Payment - Check	6333	(50.00)	0.00	(50.00)
09/06/22	09/26/22	2022-09		Invoice		59.55	(46.99)	12.56

Context Menu Options:

- Auto Apply
- Auto Apply to next Invoice
- Email
- Print Receipt
- Record Chargeback
- Reverse / Transfer / Split
- Convert to Deposit

CONFIRMATION Dialog:

Are you sure you want to convert this Payment to a Deposit ?

Buttons: YES, NO

Pathway: Accounts > AR History

AR History - Print Single Invoice Includes Link to Pay Invoice (15807)[Enhancement]

When printing a single Invoice, the system will show the invoice balance and a 'Make a Payment' link, accompanied by a list of the work orders presented as selectable hyperlinks.

The screenshot shows a printed invoice for QA Waste Services. It includes a 'Make a Payment' link and a list of work orders.

QA Waste Services
 PO BOX 260310
 legal addr 2
 Corpus Christi, TX 78426

Wilson Medical

Invoice Summary:

INVOICE #	ACCOUNT #	AMOUNT	DATE	DUE DATE

Pay Online: <https://navuqa-customerportal.login> or use QUICK PAY COD

Pay By Check: PO BOX 2603, remit addr 2, Dayton, OH 45

Enclosed Check #: _____
Amount: _____

Work Orders:

WO #	DESCRIPTION	WO #	PO #	QTY	RATE
6295337	Minimum Service Charge	6295336		1	
6295344	18 Gal Box Per Container - RMW	6295337		1	\$ 33.00
6295337	30 Gal Box Per Container - RMW	6295337		1	\$ 10.00
6295337	Minimum Service Charge	6295337		1	
6295344	18 Gal Box Per Container - RMW	6295344		1	\$ 33.00
6295344	30 Gal Box Per Container - Chemo	6295344		1	\$ 42.00
6295336	Minimum Service Charge	6295344		1	

Pathway: Accounts > Search > Accounts

Edit Account - Option to Group Invoice Details (15893)[Enhancement]

Invoice Detail Level functionality has been added to allow for grouping invoice details by Line of Business, Material, or Site Service. This option is only visible when the invoice format assigned to the Bill Group is formatted to use this functionality.



Please submit a ticket to Navusoft if you would like your invoice to be formatted to use this functionality.

EDIT ACCOUNT
?
X

Account

Settings

Billing

BILL GROUP	Annual Billing	BILL BY SITE <input type="checkbox"/>	AUTO STATUS UPDATE <input checked="" type="checkbox"/>
	Advance - Annually Billed Thru Date Dec 31, 2023 Next Invoice Date Jan 01, 2023 BATCH-25712 (in progress)		APPLY FINANCE CHARGES <input checked="" type="checkbox"/>
INVOICE BY EMAIL	No	EXCLUDE FROM PAYMENT PROCESSING FEE	<input type="checkbox"/>
INVOICE DETAIL LEVEL	Summary by Site Service	EXCLUDE FROM PAST DUE NOTIFICATION	<input type="checkbox"/>
TERM	Detail	HIDE WORK ORDER FORMAT RATE	<input type="checkbox"/>
CREDIT LIMIT	Summary by Line of business	INBOUND ORDER AUTO PRINT	<input type="checkbox"/>
	Summary by Material		
	Summary by Site Service		

AP

DEFAULT PAYMENT METHOD	Not Applicable	PAYEE NAME	
			1099 <input type="checkbox"/>
INSTRUCTIONS			
WARNING ON OPEN			

⚙️

SAVE

Accounting

Adjustment History And Pending Approval - Reversed Adjustments Display Red (15370) [Enhancement]

An enhancement has been made to the History tab in Adjustment History - Pending Approval to highlight reversed invoice adjustments in red.

ADJUSTMENT HISTORY AND PENDING APPROVAL									
DIVISION All									
Pending Approval					History				
PERIOD	REASON CODE	SUBMITTED BY		APPROVED BY	STATUS				
Jun 2022	All	All		All	All				
LOAD Search									
ACCOUNT	ACCOUNT NAME	SITE	SITE NAME	INVOICE	AMOUNT	REASON CODE	DATE	SUBMITTED BY	APPROVED BY
23394	FATIMA & JOSE GARCIA			467437	\$(10.00)	Courtesy Credit	06/01/22 4:14:17 ...	Alexis Garza	Alexis Garza
Note: 1 time courtesy									
46188	TONYA SIMPSON			467849	\$ 0.00	Courtesy Credit	06/02/22 8:06:53 ...	Megan Nguyen	Megan Nguyen
Note: POST DATE PAYMENT SCHEDULED - Adjustment reversed Jun 2 2022 1:12PM by Natalia Pacheco									
21418	SANCHEZ ADRIAN			0	\$(96.70)	Write Off	06/02/22 8:24:03 ...	Barbara Killian	Barbara Killian
Note: SENT TO COLLECTIONS									
22254	JOSE ARIAS			0	\$(79.83)	Write Off	06/02/22 8:25:53 ...	Barbara Killian	Barbara Killian
Note: SENT TO COLLECTIONS									
20012	THERESA SIMMONS			0	\$(83.49)	Write Off	06/02/22 8:26:58 ...	Barbara Killian	Barbara Killian
Note: SENT TO COLLECTIONS									
19393	DALE LEON			0	\$(88.57)	Write Off	06/02/22 8:28:06 ...	Barbara Killian	Barbara Killian
Note: SENT TO COLLECTIONS									
28808	CHAD COWAN			0	\$(82.81)	Write Off	06/02/22 8:28:52 ...	Barbara Killian	Barbara Killian
Note: SENT TO COLLECTIONS									
21853	SPENCER ISIS			0	\$(128.73)	Write Off	06/02/22 8:30:11 ...	Barbara Killian	Barbara Killian
Note: SENT TO COLLECTIONS									
20460	SHERRY PACE			0	\$(82.81)	Write Off	06/02/22 8:30:54 ...	Barbara Killian	Barbara Killian
Count: 93 Total \$(3,518.40)									

Pathway: Accounting > Invoice Adjustment - Pending Approval And History

Adjustment History and Pending Approval - Screen and Filter Modifications (15865)[Enhancement]

The following changes have been applied to the History tab of the Adjustment History and Pending Approval screen:

1. The Period filter has been changed from a drop down selection option to a Month and Year calendar picker.
2. The "Approved By" Filter has been renamed to "Approved/Rejected By."
3. In the grid, the "Approved By" column has been renamed to "Approved By/Rejected By."

ADJUSTMENT HISTORY AND PENDING APPROVAL											
DIVISION All											
Pending Approval					History						
PERIOD	REASON CODE	SUBMITTED BY		APPROVED/REJECTED BY	STATUS						
Jan Jul	All	All		All	All						
LOAD Search											
SITE	SITE NAME	INVOICE	AMOUNT	REASON CODE	DATE	SUBMITTED BY	APPROVED BY/REJECTED BY				
Jan	Jul	<	>								
Feb	Aug	2019	2024								
Mar	Sep	2020	2025								
Apr	Oct	2021	2026								
May	Nov	2022	2027								
Jun	Dec	2023	2028								
		OK		CANCEL							

The following changes have been applied to the Pending Approval tab of the Adjustment History and Pending Approval screen:

1. A Rejected Adjustments column has been added to the Invoice Adjustments dialog screen. This is accessed by double-clicking on a record from the "Pending Approval" tab.

ADJUSTMENT HISTORY AND PENDING APPROVAL

DIVISION: All

Pending Approval **3** | History

DIVISION	ACCOUNT	ACCOUNT NAME	INVOICE	AMOUNT	REASON CODE	DATE	USER	Edit	✓	✗
CORPUS	47452	Charlie Smith	856406	\$(10.00)	INV_PRICE	10/04/23	David Navarro	Edit	✓	✗
Note: test 3										
CORPUS	48677	BP Enviromental S...	806033	\$(689.07)	COURTESY	10/06/23	Matthew Van ...	Edit	✓	✗
HOUSTON	43308	G5 PEARLAND PR...	835024	\$(215.00)	INV_PRICE	10/10/23	Paul Gonzalez	Edit	✓	✗
Note: NAVU-15865 Test 2										

INVOICE ADJUSTMENT

INVOICE: 835024 | DATE: 11/15/22 | AMOUNT: \$ 1,232.88 | CREATED BY: Paul Gonzalez | DATE: Oct 10, 2023 08:54 pm

REASON CODE: Incorrect Price | PERIOD: 2023-10 | NOTE: NAVU-15865 Test 2

CREDIT ENTIRE INVOICE:

DATE	SITE ID	SITE NAME	WO #	QUANTITY	DESCRIPTION	INVOICE AMOUNT	PREVIOUS ADJUSTMENTS	PENDING ADJUSTMENTS	REJECTED ADJUSTMENTS	ADJUSTMENT AMOUNT
11/15/22	433080...	G5 PEARLAND PROP...		1	8 Yard Trash Service	\$ 894.51	\$(300.00)	\$ 0.00	\$ 0.00	\$(215.00)
11/15/22	433080...	G5 PEARLAND PROP...		1	Enclosure	\$ 95.84	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
11/15/22	433080...	G5 PEARLAND PROP...			Surcharge	\$ 134.18	\$(50.00)	\$ 0.00	\$ 0.00	\$ 0.00
11/15/22	433080...	G5 PEARLAND PROP...			Surcharge	\$ 14.38	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
11/15/22	433080...	G5 PEARLAND PROP...			Tax	\$ 2.01	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
11/15/22	433080...	G5 PEARLAND PROP...			Tax	\$ 0.90	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
11/15/22	433080...	G5 PEARLAND PROP...			Tax	\$ 0.48	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00

Pathway: Accounting > Invoice Adjustment - Pending Approval and History

AR Payment Batch - Period Filter Updated (15368)[Enhancement]

The following enhancements have been made the AR Payment Batch screen:

- The previous drop-down Period filter has been updated to display as a month/year picker.
- If the selected time period is closed, 'Closed' will display in red.

AR PAYMENT BATCH | ACCOUNTING > AR PAYMENT BATCH

PERIOD: Jun 2022 | DIVISION: All | BANK ACCOUNT: All | (Partially Closed) | Open 0 \$ 0.00 | Voided 2 \$ 0.00 | Posted 352 \$ 3,318,041.33

BATCH #	PERIOD	DIVISION	IS MERCHANT	STATUS	DATE	BANK ACCOUNT	BANK CLEARED DATE	COUNT	TOTAL	CREATED ON	GL BATCH
7717	Jun 2022	All	ent	Posted	06/01/2022	COMERICA - FWS		1	\$ 900.00	05/31/2022 4:24 pm	
7719	Jul 2022	All	ent	Posted	06/01/2022	COMERICA - FWS		182	\$ 15,670.50	05/31/2022 11:49 pm	
7720	Aug 2022	All	ent	Posted	06/01/2022	COMERICA - FWS		41	\$ 6,629.73	06/01/2022 7:31 am	
7721	Sep 2022	All	ent	Posted	06/01/2022	COMERICA - FWS		4	\$ 30,115.59	06/01/2022 7:31 am	
7722	Oct 2022	All	ent	Posted	06/01/2022	COMERICA - FWS		1	\$ 244.27	06/01/2022 7:56 am	
7724	Nov 2022	All	ent	Posted	06/01/2022	COMERICA - FWS		226	\$ 31,678.52	06/01/2022 8:20 am	

Pathway: Accounting > AR Payment Batch

AR Payment Batch - Auto Apply Check Box Added to Batch Details (15704)[Enhancement]

An "Auto Apply" checkbox option has been added to the Batch Details screen in AR Payment Batch for batch imports.

BATCH - 11045 DIVISION - HOUSTON

DATE: 09/11/2023 BANK ACCOUNT: COMERICA - FWS AMOUNT: \$ 0.00 COUNT: 2 STATUS: Posted

NOTE: CREATED BY: David Navarro - 09/11/2023 7:09 am POSTED BY:

Search for Account/ Site Double click on search result to add payment DEFAULT PAYMENT TYPE:

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 DEPOSIT AMOUNT	AUTO APPLY	
48925	Pre Payment Test	Active	\$(2,195.00)	Credit Card		0.00	<input type="checkbox"/>	<input type="checkbox"/>	
48925	Pre Payment Test	Active	\$(2,195.00)	Credit Card		0.00	<input type="checkbox"/>	<input type="checkbox"/>	

Pathway: Accounting > AR Payment Batch

AR Payment Batch - Logic Updated to Credit Card Posting (15721)

The system's logic for managing payment batches that involve credit card processing has been enhanced. It now provides a "posting successful" message, indicating that payments will continue to process, instead of the error message users received previously.

AR PAYMENT BATCH

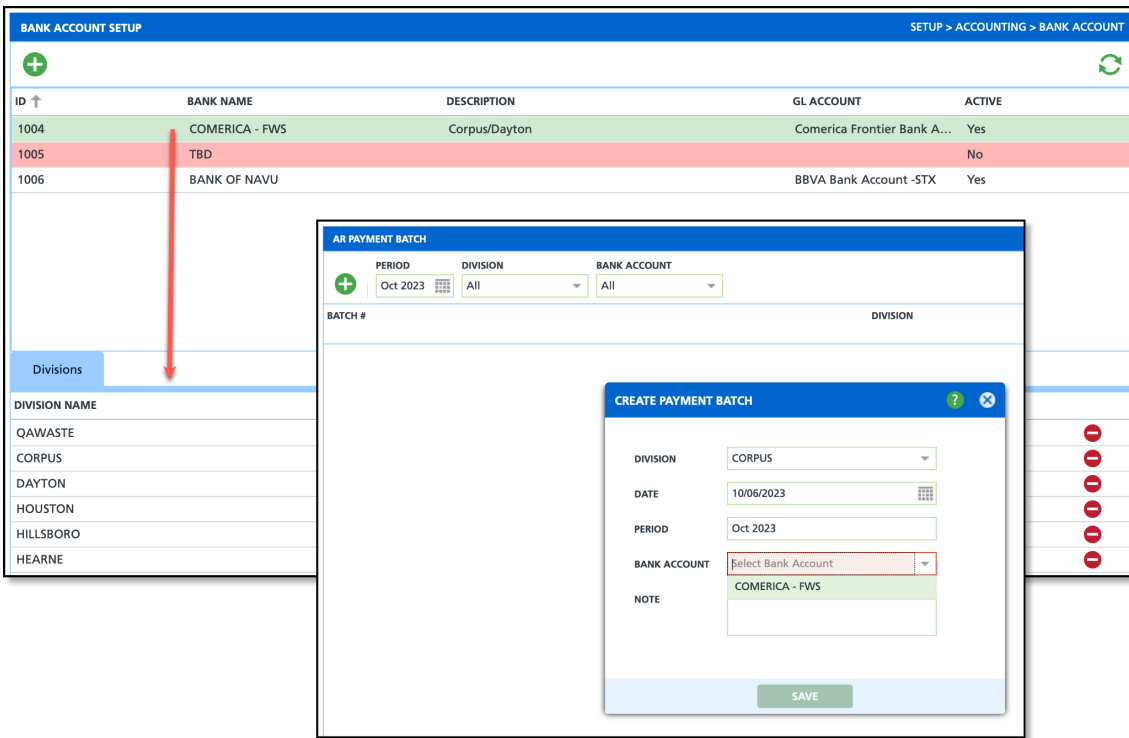
 PERIOD: Sep 2023 DIVISION: HOUSTON BANK ACCOUNT: All Open 1 \$ 0.00

BATCH #	DIVISION	TYPE	IS MERCHANT	STATUS	DATE	BANK ACCOUNT
11044	HOUSTON	Payment		Posted	9/7/23	COMERICA - FWS
11045	HOUSTON	Payment	Pineapple Applied Payment	Posted	9/11/23	COMERICA - FWS
11046	HOUSTON	Payment		Posted	9/11/23	TBD
11049 Note NAVU-1526...	HOUSTON	Payment		Posted	9/14/23	TBD
11052 Note NAVU-1575...	HOUSTON	Payment		Posted	9/15/23	TBD
11056 Note NAVU-15721	HOUSTON	Payment		Open	9/18/23	TBD

Pathway: Accounting > AR Payment Batch

AR Payment Batch - Option to Limit Bank Accounts to a Division Added (15845)[Enhancement]

The Bank Account Setup screen now includes the option to restrict bank accounts by division. When a division is linked to a bank account, only the bank accounts associated with that specific division will appear as a selectable option on the 'Create Payment Batch' screen.



Pathway: Accounting > AR Payment Batch; Setup > Accounting > Bank Account

Auto Pay Management - Screen and Logic Updates (15713)[Enhancement]

The following screen updates have been applied to the Auto Pay Management screens:

Tab: Scheduled Auto Pay

1. 'Limit to Expired' checkbox added and records are filtered when checked.
2. 'Limit to Last Payment Declined' checkbox added and records are filtered when checked.
3. Grouping and count of records by day of month.
4. 'Auto Refresh' icon added to right of Search.

Tab: Billing Auto Pay

1. 'Auto Refresh' icon added to right of Search.

The screenshot shows the 'Billing Auto Pay' screen. At the top, there are tabs for 'Scheduled Auto Pay' and 'Billing Auto Pay'. Below the tabs is a search bar with a refresh icon (4). The search criteria include 'DIVISION' (All), 'Limit to Expired' (checkbox), and 'Limit to Last Payment Declined' (checkbox). The main table has columns: TYPE, LAST PAYMENT, ACCOUNT ID, ACCOUNT NAME, CURRENT, 1-30, 31-60, 61-90, 91-120, 120+, and TOTAL. The table is grouped by 'Day of Month' (3). The records are as follows:

TYPE	LAST PAYMENT	ACCOUNT ID	ACCOUNT NAME	CURRENT	1-30	31-60	61-90	91-120	120+	TOTAL
- Day of Month: 1st - 1 record(s)										
Visa (5158) Exp: 10/25		48359	Michelle Smith	-7.12	0.00	0.00	0.00	0.00	0.00	-7.12
- Day of Month: 2nd - 1 record(s)										
Mastercard (8776) Expired	09/03/23 \$66.39	46103	JANET L MORGAN	0.00	0.00	0.00	0.00	0.00	61.44	61.44
- Day of Month: 5th - 1 record(s)										
Mastercard (2758) Exp: 06/24	10/24/22 \$158.67	48567	PATRICIA ESPREE	-39.32	0.00	0.00	0.00	0.00	0.00	-39.32
- Day of Month: 6th - 1 record(s)										
Visa (9886) Exp: 04/24		48337	Jeniffer McKeand	-20.72	0.00	0.00	0.00	0.00	0.00	-20.72
- Day of Month: 10th - 1 record(s)										

Pathway: Accounting > Auto Pay Management

GL Transaction Processing - Logic Updated to Display the User Who Posted (15841)

The GL Transaction Processing screen has been updated to display the name of the user who processed single invoices.

GL TRANSACTION PROCESSING							ACCOUNTING > GL TRANSACTION PROCESSING	
AR PERIOD		Aug 2022 - Partially Closed		LOAD				
Pending		In Progress		Posted		Summary		
TYPE		All		No Found Setup Errors			Search	
<input type="checkbox"/>	TYPE	REFERENCE #	AR PERIOD	DATE	COUNT	ERRORS	POSTED BY	
<input type="checkbox"/>	Billing Batch	19248	2022-08	08/01/2022	20		David Navarro 07/29/2022 5:04 pm	
<input type="checkbox"/>	Billing Batch	19251	2022-08	08/01/2022	1		David Navarro 08/01/2022 7:28 am	
<input type="checkbox"/>	Billing Batch	19256	2022-08	08/01/2022	1		David Navarro 08/01/2022 7:34 am	
<input type="checkbox"/>	Billing Batch	19257	2022-08	08/01/2022	934	283 Fix Errors	John Doe 08/01/2022 7:42 am	
<input type="checkbox"/>	Billing Batch	19258	2022-08	08/01/2022	1		John Doe 08/01/2022 7:42 am	
<input type="checkbox"/>	Billing Batch	19259	2022-08	08/01/2022	1		John Doe 08/01/2022 7:42 am	
<input type="checkbox"/>	Billing Batch	19260	2022-08	08/01/2022	1		John Doe 08/01/2022 7:42 am	
<input type="checkbox"/>	Billing Batch	19261	2022-08	08/01/2022	1		John Doe 08/01/2022 7:42 am	
<input type="checkbox"/>	Billing Batch	19265	2022-08	08/01/2022	1		John Doe 08/01/2022 7:42 am	

Pathway: Accounting > GL Transaction Processing

Operations

Inventory Management - Import Inventory Functionality Added (15535)[Enhancement]

Import Inventory functionality has been removed from Database > Import and added to the Inventory Management screen in Operations. This feature requires the following permissions to import:

- 423 Import Inventory
- 449 Inventory Management

CSV Column Layout Requirements and Logic:

1. Yard column
 - Record will be rejected if yard is not found.
2. Site column
 - Input: Site ID or External ID
 - Record will be rejected if Site is not found.
3. Equipment Type column
 - Record will be rejected if the equipment type is not found.
4. Quantity column
5. Serial Number column
 - If the equipment type is **serialized** and a serial number is not entered the record will be rejected
 - If the equipment type is **not serialized** and a serial number is entered the record will be rejected.
6. Note column

INVENTORY MANAGEMENT		OPERATIONS > INVENTORY MANAGEMENT				
LINE OF BUSINESS Roll Off		IMPORT INVENTORY		Search		
LINE OF BUSINESS	EQUIPMENT TYPE	SERIALIZED	TOTAL QUANTITY	SITE QUANTITY	YARD QUANTITY	
Roll Off	10 Yard Roll Off	No	34	9	25	
Roll Off	15 Yard Roll Off	No	18	5	13	
Roll Off	20 Yard Roll Off	No	2	2	0	
Roll Off	20 Yard Compactor	No	12	2	10	
Roll Off	25 Yard Roll Off	No	1	1	0	
Roll Off	25 Yard Compactor	No	0	0	0	
Roll Off	30 Yard Roll Off	No	11	11	0	
Roll Off	30 Yard Compactor	No	0	0	0	
Roll Off	32 Yard Compactor	No	0	0	0	
Roll Off	35 Yard Compactor	No	0	0	0	
Roll Off	40 Yard Receiver	No	0	0	0	
Roll Off	40 Yard Roll Off	No	3	3	0	

Pathway: Operations > Inventory Management

Articles: [Import Inventory](#)

Inventory Management & Site - Logic Updated to Serial Number field (15670)

The field logic for the Serial Number field has been revised when adding a serialized equipment type. Following this update, the Serial Number field will now be mandatory to complete the equipment entry. This requirement applies whether the equipment is being added through the Inventory Management screen or the Site Inventory screen.

Dispatch - Route Disposal Records Delete Option (15666)[Enhancement]

Within the Dispatch screen, the Route Disposal Records now include the option to remove a disposal ticket from the list by selecting the removal icon associated with the ticket.

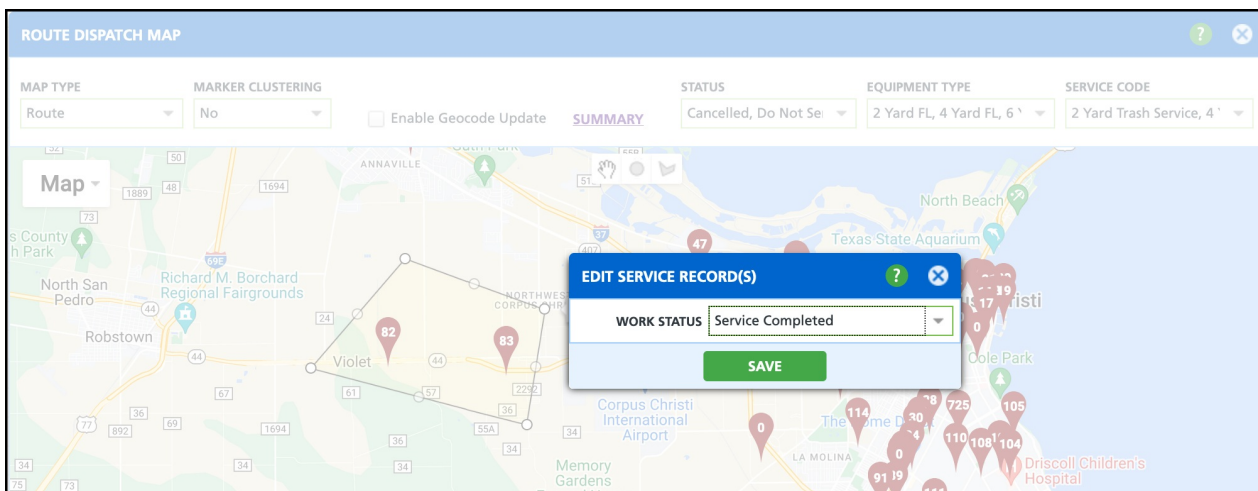
ROUTE DISPOSAL RECORDS							
START DATE/TIME ↓	END DATE/TIME	LOCATION	WORK ORD...	TANK	TICKET #	QUANTITY MATERIAL	TOTAL COST
Thu Aug 24, 2023 10:1...		CHAMBERS COU...	6351037			0.05 tons MSW	\$ 0.00

! -

Pathway: Operations > Dispatch

Dispatch - Map Unable To save Multiple Records When Updating Work Status (15680)

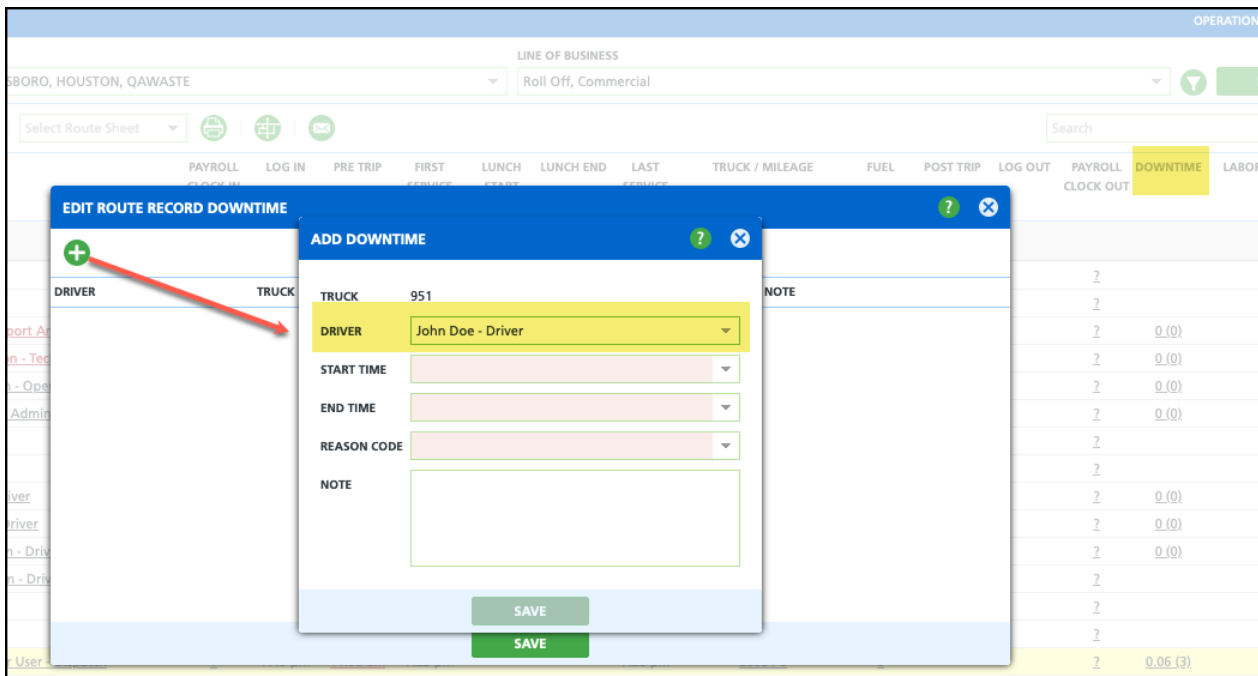
A previous issue with the Route Dispatch Map not allowing users to save a Work Status change when the polygon tool was used has been successfully resolved.



Pathway: Operations > Dispatch

Dispatch ('Route Productivity' View) - Downtime Using User and Not Driver Name (14387)

An issue has been resolved in the Add Downtime editor, where it was incorrectly displaying the user's name in the Driver field instead of the driver's name. Additionally, the Driver field has been improved by converting it into a drop down menu, with the default being the driver assigned to the route.



Pathway: Operations > Dispatch > "Route Productivity" view

Services List (Dispatch) - Logic Updated to 'Set Posting' for Posted Work Orders (15849)

Previous posting logic only allowed a work order to progress in the "Pending" to "Posted" process. With this change, if a work order has not been billed, the Posting Status can be reverted back to "Ready to Post" from a "Posted" status.

SERVICES LIST										
Billing										
Select Print Format										
SET POSTING										
EDIT										
PRINT COMPLETED										
Search										
ROUTE	LOCATION	SCHEDULED DATE	WO#	Ready to Post	QTY	CHARGE QTY	EQUIPMENT	REVENUE	RECURRING RATE	POSTING STATUS
<input checked="" type="checkbox"/>	HOU 201	44892001 Pearland CHRISTMAS TREES 1234 Example St. Drive, Pearland	Tue 10/10/23	6584049	Scheduled Service COMPLETED 6:11 am	1	0	6 Yard FL	\$ 206.83	Posted
<input checked="" type="checkbox"/>	HOU 201	43890032 -WEST PEARLAND LIBRARY 1111 Learning Way, Pearland	Tue 10/10/23	6670234	Scheduled Service COMPLETED 3:43 am	1	0	4 Yard FL	\$ 52.32	Posted
<input type="checkbox"/>	HOU 201	43178006 * COD SHERWIN WILLIAMS 2222 SHADOW CREEK PKWY, PEARLAND	Tue 10/10/23	6703737	Scheduled Service COMPLETED 3:39 am	1	0	4 Yard FL	\$ 154.91	Pending
<input type="checkbox"/>	HOU 201	43178043 COD HEALTHSOUTH 3333 BUSINESS CENTER DR, PEARLAND	Tue 10/10/23	6771466	Scheduled Service COMPLETED 4:53 am	3	0	8 Yard FL	\$ 1,740.54	Pending

Services List (Dispatch) - Work Order Payment Terms COD and CIA Display with Account (15396) [Enhancement]

If an account is (COD) Cash on Delivery, or (CIA) Cash in Advance, "COD" or "CIA" will display after the Site ID in red text.

SERVICES LIST							
Productivity							
Select Print Format							
SET POSTING							
EDIT							
PRINT COMPLETED							
ROUTE	LOCATION	WO#	WO TYPE	EQUIPMENT	SERVICE TYPE	START TIME	COMPLETION TIME
<input type="checkbox"/>	HOU 206	47426001 * THOMAS PRINTWORKS 1234 Richmond Avenue, Houston	6386859	Scheduled Service	8 Yard FL	FL Service	
<input type="checkbox"/>	HOU 206	47425001 CIA 1111 Investments 1111 Montrose Boulevard, Houston	6388328	Scheduled Service	4 Yard FL	FL Service	
<input type="checkbox"/>	HOU 206	47411001 * HOUSTON LIFE OAK LOFT CONDOMINIUMS 2222 Live Oak Street, Houston	6387529	Scheduled Service	6 Yard FL	FL Service	
<input type="checkbox"/>	HOU 206	47111101 * TOLUNAY-WONG ENGINEERS 3333 South Sam Houston Parkway West, Houston	6387531	Scheduled Service	8 Yard FL	FL Service	

Pathway: Operations > Dispatch > Services List

Reports

Analysis Reports - AR Analysis Report Updated (15771)[Enhancement]

A new "Type" column has been added to the 'AR Analysis Details - Payments' screen, which indicates the type of payment received. To access this screen and review payments for a specific month, select an amount from the Payments row.

AR ANALYSIS										
TYPE	AR Analysis									
YEAR	DIVISION									
2023	All									
	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT
Beginning balance	1,564,417.01	1,701,153.26	1,976,638.43	2,026,311.65	2,022,902.36	2,011,078.45	1,992,469.87	1,993,740.03	1,992,871.73	4,840,129.85
Manual Charges	11,397.95	6,521.54	273.30	199.11	366.34	80.30	137.25	-18.54	1,573,659.90	0.00
Work order charges	10,548.94	20,466.31	5,325.75	795.25	1,007.70	3,335.95	1,671.55	0.00	0.00	0.00
Recurring services	97,532.03	201,732.68	39,059.62	415.00	196.60	685.56	167.95	489.84	750,210.44	0.00
Surcharges	18,913.72	31,426.48	6,454.42	229.58	162.52	467.47	136.21	35.78	348,585.58	0.00
Taxes	7,620.70	18,037.07	1,996.81	80.65	60.05	312.34	12.10	30.63	220,461.88	0.00
Refund/Rebate checks	0.00	0.00	277.50	0.00	0.00	0.00	0.00	0.00	-101.00	0.00
Payments	-8,392.09	-993.20	-3,933.05	-5,175.23	-15,538.40	-21,861.82	-660.50	-1,361.01	-45,553.68	0.00
Adjustments	-885.00	-1,705.71	-102.88	-60.00	0.00	-1,628.38	-194.40	-45.00	-5.00	0.00
Pa								0.00	0.00	0.00
To								2,871.73	4,840,129.85	4,840,129.85

AR ANALYSIS DETAILS - PAYMENTS - SEP						
DIVISION	ACCOUNT ID	ACCOUNT NAME	SITE ID	SITE NAME	TYPE	INVOICE
HOUSTON	45170	RUBICON GLOBAL	45170021	DOLLAR GENERAL	Payment-Check	
HOUSTON	48970	Starbucks	48970001	Starbucks	Payment-Check	
DAYTON	30565	DOMINOS PIZZA			Payment-ACH	
DAYTON	30977	RTS INC.			Payment-Check	
HOUSTON	44485	Pearland Pink Tags			Payment-Money Order	
HOUSTON	44670	Republic Service Group Nat'l Accounts			Payment-Check	
HOUSTON	48976	Unmatched Default Account			Payment-Check	
HOUSTON	43177	INDUSTRIAL & MARINE SERVICE CO			Payment-Check	
HOUSTON	43242	SHADOW CREEK RANCH MAINT ASSOC			Payment-Check	

Pathway: Reports > Analysis > AR Analysis

Analysis Reports (AR Analysis) - Update to Surcharges Amounts (15814)[Enhancement]

The 'Surcharges' in the AR Analysis report have been broken out into 'Surcharges' and 'Surcharge - Non Revenue'. This was done to allow just the surcharge revenue to be tied back to the Revenue Analysis report.

AR ANALYSIS							
TYPE	AR Analysis						
YEAR	DIVISION						
2023	All						
	JAN	FEB	MAR	APR	MAY	JUN	JUL
Beginning balance	1,583,964.39	1,720,823.64	1,996,308.81	2,045,982.03	2,042,572.74	2,030,748.83	2,012,678.65
Manual Charges	11,397.95	6,521.54	273.30	199.11	366.34	80.30	137.25
Work order charges	10,548.94	20,466.31	5,325.75	795.25	1,007.70	3,335.95	1,671.55
Recurring services	97,655.03	201,732.68	39,059.62	415.00	196.60	1,223.96	167.95
Surcharges	8,263.17	1,877.89	929.10	136.58	109.27	467.47	136.21
Surcharges- Non Revenue	10,650.55	29,548.59	5,525.32	93.00	53.25	0.00	0.00
Taxes	7,620.70	18,037.07	1,996.81	80.65	60.05	312.34	12.10
Payments	-8,392.09	-993.20	-3,933.05	-5,175.23	-15,538.40	-21,861.82	-660.50
Adjustments	-885.00	-1,705.71	-102.88	-60.00	0.00	-1,628.38	-194.40
Payment reversals	0.00	0.00	321.75	106.35	1,921.28	0.00	0.00
Total	1,720,823.64	1,996,308.81	2,045,704.53	2,042,572.74	2,030,748.83	2,012,678.65	2,013,948.81

Pathway: Reports > Analysis > AR Analysis

Sales

Rate Update Batch - Export File Updated (15733)[Enhancement]

The Excel Export file has been improved by adding an ID column to address the issue that users encountered when attempting to use the same file format for importing a rate update batch. It's important to note that an error will consistently occur during the import process if the file lacks an ID column.

Pathway: Sales > Rate Update Batches

Pipelines - Hyperlink Added to Sales Opportunities if Contact Exists (15784)[Enhancement]

The Pipeline Opportunities Dashboard now includes a new "Contact" column. If a contact is identified on the proposal, the contact's name will display as a hyperlink in the Contact column. When selected, the 'View Contact' screen displays with the contact's information.

PROPOSAL ID	SITE NAME	CONTACT	NEXT STEP	STATUS	SALES REP
3825	John Doe			Open	House Acct no
3828	S. BAPTIST CHURCH	GLORIA		Open	House Acct no
3830	Navu CO. AIR NAIL BUILDERS			Open	House Accour
3834	CROSSROADS COMMUNITY CHURCH			Open	House Acct no

Pathway: Sales > Pipelines > Opportunities > Make a selection from the upper grid

Sales (Pipelines) - Improvements Applied To Pipeline Opportunities (15946)[Enhancement]

The following changes have been made to the Pipeline Opportunities screen:

1. The previously displayed checkbox filters have been moved to the top of the screen and are now presented as dropdown selections. The default setting for each is 'All.'
2. Division Groups have been added to display in the Division drop down options.
3. A 'Group By' drop down has been added to group opportunities by either Month or Quarter. Depending on the chosen option, the associated 'Estimated Close' months checkboxes below the dropdown will automatically change to align with the selection.
4. The Estimated Close months and Closing Probability check boxes have been updated.
5. The Proposal ID now includes a hyperlink to display the Edit Proposal popup editor.
6. Columns for Proposal Properties and Account Properties have been added.
7. The following proposal fields can now be edited from the Sales Opportunities screen by clicking within the field:
 - o Sales Rep
 - o Estimated Closing Date
 - o Start Date
 - o Probability
 - o Double click within the row of a proposal to open the Edit Proposal window.

The screenshot shows the 'SALES OPPORTUNITIES' interface. At the top, there are filters for DIVISION (CORPUS, DAYTON), SALES REP (Aliena Somers), ACCOUNT CLASS (BROKER, COMMER), STATUS (Open, Submitt), FORM TYPE (Proposal, Servi), and TEMPORARY / PERMANENT (Permanent, Temporary). A 'LIMIT TO PROSPECTS' checkbox is also present. Below the filters, there are sections for 'Estimated Close' and 'Closing Probability'. The 'Estimated Close' section has a 'GROUP BY' dropdown set to 'Month' and checkboxes for 'High', 'Medium', and 'Low' probability. The 'Closing Probability' section shows a table of estimated values for different months. At the bottom, there is a table of proposals with columns for PROPOSAL ID, SITE NAME, CONTACT, NEXT STEP, STATUS, SALES REP, MONT... REV., ESTIMATED CLOSING DATE, START DATE, PROBA..., FORMAT, FORM TYPE, PROPOSAL PROPERTIES, and ACCOUNT PROPERTIES. A search bar is located above the table.

GROUP BY	High	Medium	Low
Prior Months	\$ 250 1	\$ 75 3	\$ 54 1
2023-NOV	\$ 700 2	\$ 117.29 2	\$ 83 1
2023-DEC	0	\$ 108.2 1	\$ 250 1
2024-JAN	\$ 87.29 1	0	\$ 108.2 1
2024-FEB + Future	\$ 120.42 1	\$ 120.42 1	\$ 108.2 1

PROPOSAL ID	SITE NAME	CONTACT	NEXT STEP	STATUS	SALES REP	MONT... REV.	ESTIMATED CLOSING DATE	START DATE	PROBA...	FORMAT	FORM TYPE	PROPOSAL PROPERTIES	ACCOUNT PROPERTIES
3844	GOODWILL		!	Submi...	House ...	\$ 250.00	12/01/2023	08/11/2023	Low	Proposal	A-New ...		
3850	Goodwill Test		!	Open	Dave Pi...	\$ 250.00	08/17/2023	08/17/2023	High	Service...	A-New ...		
3860	Example Site 1			Open	House ...	\$ 83.00	11/30/2023	11/06/2023	Low	Service...	Chg Sv...		
3863	Example Site 1			Open	House ...	\$ 0.00	09/06/2023	09/06/2023	Medium	Service...	Chg Sv...		
3864	Example Site 1			Open	House ...	\$ 0.00	09/06/2023	09/06/2023	Medium	Service...	Chg-Te...		
3868	Northpoint Plaza			Open	Rob Tel...	\$ 54.00	09/07/2023	09/07/2023	Low	Service...	A-New ...		
3871	Starbucks		!	Open	Isabel ...	\$ 30.00	11/30/2023	10/01/2023	Medium	Proposal	A-New ...		
3885	Roll Off Service...		!	Submi...	Emilio ...	\$ 700.00	11/30/2023	10/09/2023	High	Proposal	A-New ...		

Pathway: Sales > Pipelines > Opportunities

Setup

Work Type Setup - Correction to Inventory Move Type Options (15677)

A correction has been made to the 'Inventory Move Type' field in the Work Type setup screen to only display the following work types:

- None
- Delivery
- Exchange
- Removal

UPDATE WORK TYPE

Details | **NavuNav Settings** | Add/Remove Default Charge Code

ID: DUMPONLY

NAME: Dump Only

LINE OF BUSINESS: Roll Off

INVENTORY MOVE TYPE: None

ACTION CATEGORY: None

MANIFEST NOTIFICATION TEMPLATE: Exchange

CREATE ONE SERVICE RECORD PER QUANTITY: Removal

ENABLE DISPOSAL OR MATERIAL ENTRY: Disposal Entry

ENABLE CONSOLIDATION BATCH LINK: No

(INBOUND) REQUIRE SOURCE LOCATION: No

Pathway: Setup > Operations > Work Type

Work Type - New Notification Alert Added (15650)[Enhancement]

Within the Work Type setup screen, a new alert option, "Service Reminder For Every x Weeks Services (Send 1 Calendar Day Prior To Scheduled Service At 7 AM)," has been added to the Notification Types in the Alerts tab.

Alerts | **Surcharges**

NOTIFICATION TYPE	NOTIFICATION TEMPLATE
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 every x weeks services (Send 1 business day prior to scheduled service at 7PM)	
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)	
Service reminder for all services (Send 1 week prior to scheduled service at 7am)	

Pathway: Setup > Operations > Work Type

Article: [Work Type](#)

System (Division) - New Lockbox Import Format Added (15268)[Enhancement]

A new "Signature Waste Import" format has been added as an option in the "Lockbox Import Format" dropdown menu.

DIVISION SETUP

+ DIVISION HOUSTON

Details | Credit Card / ACH Processing | Cost / Target Pricing | Inter-company

DIVISION ID: 1004
 NAME: HOUSTON

Legal Address		Bill Remit Address	
NAME	QA Waste Services	NAME	QA Waste Services - HOUSTON
ADDRESS LINE 1	PO BOX 260311	ADDRESS LINE 1	PO Box 260310
ADDRESS LINE 2		ADDRESS LINE 2	
CITY	Houston	CITY	Corpus Christi
STATE	TX	STATE	TX
POSTAL CODE	78426	POSTAL CODE	78426
MAIN PHONE	(936) 258-9035	AUTO PROCESS SERVICE CHANGES	Active Service
TOLL FREE PHONE	(999) 999-9999	ENABLE INTEGRATION	None
FAX	(999) 999-9999	LOCKBOX IMPORT FORMAT	Signature Waste Import
EMAIL	HOU_Div@navusoft.com	LOCKBOX NON-MATCHING ACCOUNT	48976
TIME ZONE	Central Standard Time	ACCOUNT PORTAL URL	navuqa-customerportal.navusoft.net

Pathway: Setup > System > Division

Report Format Setup - 'View' Hover Logic Updated (15785)

The logic has been modified to 'View' with regard to which file types appear upon hovering. When a user hovers their mouse over 'View,' only a preview for image file types will be shown.

REPORT FORMAT SETUP

Invoices | Manifests | Route Sheets | Work Orders | Hazardous Labels | Manifest Consolidation | Account Portal Reports | Past Due Letters

NAME	BACKGROUND	CUSTOM TEXT
Approved Universal Waste BOL		
BWS Manifest 1		
BWS Non Hazardous Manifest		
Document Destruction Manifest		
E360 Manifest 1		
GIC Medical Manifest 1		
Hazardous Material Manifest		
Healthwise Document Destruction Manifest		
Medical Waste Manifest		
Mediwaste Bill of Lading		
Mediwaste Document Destruction Manifest		
Mediwaste Manifest		
Mediwaste Rack Worksheet		
Trilogy Document Destruction Manifest		
Trilogy Manifest (Multi-Transfer)		
Universal Waste Manifest		

EDIT MANIFEST FORMAT

NAME: GIC Medical Manifest1

CUSTOM NAME: []

CUSTOM TEXT 1: []

CUSTOM TEXT 2: []

CUSTOM TEXT 3: []

BACKGROUND: [View](#)



ACTIVE: Yes

aved.

Pathway: Setup > Report Formats

Report Formats - Work Order Format 3 Updated (15892)[Enhancement]

Work Order Format 3 has been updated to display the driver and customer signatures captured in NavuaNav at the bottom of the work order along with the completion date (contingent upon a signature capture).

		Work Order: 6536142	
DAYTON PO BOX legal addr 2 Corpus Christi, TX 78426		Route: DAY-601	Sequence: 0
Site #: 48910001 PO #: Account Name: LIBERTY SITE		Service Date: Aug 30, 2023	Order Date: Lori Sheldt 08/15/2023 12:08 PM
Service Address: Service City: West Chester Site Contact: Site Phone:		Requested By: Bin # Delivered: _____ Bin # Removed: _____	Time Window: 3:00 AM-12:00 PM;12:30 PM-7:00 PM Arrival Time: _____ Depart Time: _____
			
Service Description Regulated Medical Waste Service			



Work Order	Qty	Action	Type	Serial Numbers	Destination
6536142	1	Scheduled RMW Service			

Work Order Notes:

Access Notes:

Detailed Notes:

Service Notes: Added new code with max weight ID

 _____ DRIVER SIGNATURE	Aug 30, 2023 _____ DATE	 _____ CUSTOMER SIGNATURE	Aug 30, 2023 _____ DATE
--	-------------------------------	--	-------------------------------

Pathway: Setup > Report Formats > Work Orders > Work Order Format 3

User Setup - Enhancements Made To Add/Edit User (15797)

The following changes have been applied to the User Setup screen:

1. A refresh page option added.
2. Reset Password has been moved to the bottom of the Edit User tool.
3. Manager ID has been changed to Manager.

SETUP > SYSTEM > USER

ted

DEPARTMENT MANAGER SALES GOAL EXTERNAL ID EXTERNAL USER DEFAULT APP DEFAULT HOME ONLINE IMAGE AUTOMATIC SIGNATURE IMAGE

EDIT USER - 3435 - TED BRISTER (IT & REPORTING)

LAST LOGIN **Never Logged In**

STATUS: Active

FIRST NAME: Ted

LAST NAME: Brister

EMAIL: tbrister@email.com

CELL PHONE: (999) 999-9999

OFFICE PHONE: (999) 999-9999

TITLE: IT & Reporting

DEPARTMENT: Admin

MANAGER: David Grant - Driver (Operations)

SALES GOAL TYPE: Revenue

EXTERNAL ID: 21

EXTERNAL USER ID:

DEFAULT APP COLOR: Blue

WORKER COST PER HOUR LEVEL:

DEFAULT HOMEPAGE: Recent Activity

ONLINE IMAGE: Select Image... **BROWSE...**

AUTOMATIC COUNTERSIGN: No

SIGNATURE IMAGE: Select Image... **BROWSE...**

RESET PASSWORD **RESEND EMAIL INVITATION**

Pathway: Setup > System > User

Account Class - Updates to 'Finance Charges / Late Fees' section (15804)

In the Finance Charges / Late Fees section of the Account Class, the option 'Accrued Daily' has been removed from the Finance Charge Type drop-down field. Additionally, the 'Apply Fin Charge From Days' text entry field, which used to display for 'One Time Fee Per Invoice,' has also been removed.

UPDATE ACCOUNT CLASS

Details Account Portal Payment Processing

NAME: ROLL OFF-TEMP

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

EXCLUDE FROM NAVU SALES: No

Status Management

ENABLE AUTOMATIC STATUS UPDATE: No

AUTO CREDIT HOLD PAST DUE DAYS: 0

AUTO CREDIT HOLD MINIMUM PAST DUE AMOUNT: 0.00

AUTO INACTIVE ACCOUNT/SITE DAYS: 0

AUTO CREDIT HOLD PLACEMENT: No

AUTO CREDIT HOLD REMOVAL: No

STATUS UPDATE TIME: 12 AM *Pacific Standard Time*

RUN DAILY AUTO APPLY: No

Finance Charges / Late Fees

FINANCE CHARGE TYPE: One Time Fee Per Invoice

RATE: None

CHARGE CODE: **Accrued Daily**

CHARGE MINIMUM: One Time Fee Per Invoice

PAST DUE MINIMUM: 20.00

APPLY FIN. CHARGE FROM DAYS: 1

Pathway: Setup > Account > Account Class

Account Class - Screen Modifications to Add/Edit Account Class (15853)[Enhancement]

The Add/Edit Account Class screen has been modified with the following changes:

1. The 'Status Management' and 'Finance Charge / Late Fees' sections have been relocated to their own tabs.
2. Two new fields "Deposit GL Account" and "Deposit GL Segment" have been added.
3. Fields "Create Contact Default" through "Hide Rate On Work Order Format" have been relocated from the left column over to the right.

The screenshot shows the 'ADD ACCOUNT CLASS' interface with the following elements:

- Header:** 'ADD ACCOUNT CLASS' with a help icon and close button.
- Tabs:** 'Details', 'Account Portal', 'Payment Processing', 'Status Management', and 'Finance Charges / Late Fees'. The 'Status Management' and 'Finance Charges / Late Fees' tabs are highlighted with a red circle '1'.
- Fields:**
 - NAME, ACTIVE, TYPE, GL ACCOUNT, GL SEGMENT, DEFAULT ACCOUNT CREDIT LIMIT, DEFAULT ACCOUNT TERM, DEFAULT REBATE PAYMENT TYPE, DEFAULT BILL BY SITE.
 - DEPOSIT GL ACCOUNT** and **DEPOSIT GL SEGMENT** (highlighted with a red circle '2').
 - CREATE CONTACT DEFAULT**, **DEFAULT CONTACT SERVICE NOTIFICATION**, **GEOCODING TYPE**, **GEOFENCE RADIUS (METERS)**, **NEW ACCOUNT NOTIFICATION TEMPLATE**, **REQUIRE GENERATOR TYPE**, **ENABLE LINKING CONTACTS TO ALL SITES**, **LOAD ACTIVE ACCOUNTS IN PIPELINE MAP**, **REQUIRE BILLING CONTACT**, **EXCLUDE FROM NAVU SALES**, and **HIDE RATE ON WORK ORDER FORMAT** (highlighted with a red circle '3').
- Buttons:** A 'SAVE' button at the bottom center.

Pathway: Setup > Account > Account Class

Account Class - Update to Account Portal Tab Setting (15830)[Enhancement]

The 'Enable Service Photo Display' settings has been renamed to "Default Work Order Photo - Display in Customer Portal." Additionally, the photo logic in NavuNav has been modified to align with this updated setting.

UPDATE ACCOUNT CLASS

Details | **Account Portal** | Payment Processing | Status Management | Finance Charges / Late Fees

ENABLE PORTAL ACCESS	Yes
ACCOUNT PORTAL HOME PAGE	Standard
ENABLE ADD SITES	No
NEW LOCATION TEMPLATE	
NEW LOCATION BUNDLE	
ENABLE ON CALL ORDERS	Yes
ENABLE REPORT ACCESS	No
ENABLE VIEWING INACTIVE SITE	No
DEFAULT WORK ORDER PHOTO - DISPLAY IN CUSTOMER PORTAL	No

Pathway: Setup > Account > Account Class

Setup - Site Service Recurring Minimum Functionality Added (15844)[Enhancement]

Line of Business

Pathway: Setup > Services > Line of Business

1. The Profitability section has been relocated to its own tab.
2. A new field "Recurring Minimum Charge Code" has been added and is limited to charge codes of the same Line of Business.

UPDATE LINE OF BUSINESS

LOB ID: RO

NAME: Roll Off ACTIVE: Yes

Settings | Mobile | Optimization | Self-Service Ordering | **Profitability**

SCREEN TYPE	1	ENABLE USED OIL COLLECTION	No
GL SEGMENT	D300	ENABLE PROACTIVE ROUTE STATUS DRIVER CHECK	No
UNEARNED REVENUE GL ACCOUNT	Unearned Revenue	ENABLE MANIFEST PROCESSING	No
WORK ORDER MINIMUM CHARGE CODE		ENABLE MANIFEST GROUP WEIGHT ROUNDING	No
OVER MAX WEIGHT CHARGE CODE		ENABLE ACTIVE DISPATCH	Yes
INITIAL CHARGE CODE	Inactivity Fee	ENABLE CHARGE CODE WASTE CODES	No
RECURRING MINIMUM CHARGE CODE	Roll Off Service Minir	ENABLE WORK TYPE DEFAULT CHARGE CODES	Yes
LIMIT CHARGE CODE TO MATCHING EQUIPMENT	No	ENABLE BIC REPORTING	No
LIMIT CHARGE CODE TO MATCHING MATERIAL	No	ENABLE LABOR TRACKING	No
INVOICE SUMMARY DESCRIPTION	This is a test. RO LOB Setup		
PRODUCTIVITY UNIT NAME			

Service Code

Pathway: Setup > Services > Service Code

- o A new field "Enable Recurring Minimum" has been added to the Service Code tab and will only display if the Recurring Minimum Charge Code field in the line of business is populated.

The screenshot shows the 'UPDATE SERVICE CODE' form with the following fields and values:

SERVICE CODE	RO10T	ACTIVE	Yes
NAME	10 Yard Open Top Service	ENABLE ROUTING	Yes
LINE OF BUSINESS	Roll Off	REQUIRE FREQUENCY	Yes
EQUIPMENT TYPE	10 Yard Roll Off	ENABLE DRIVER UPDATE	No
MATERIAL TYPE		ENABLE ACCOUNT SIGNATURE	No
UOM	month	ENABLE DRIVER SIGNATURE	No
TAXABLE	Yes	ENABLE RECURRING MINIMUM	Yes
CLASS		ENABLE WORK ORDER MINIMUM	No
GL ACCOUNT	Service Income:Roll Off Service In	ENABLE RENTAL FEE	Yes
PRORATION METHOD	Calendar Days - Start and End	ENABLE DEFAULT DESTINATION	Yes
BILL WHILE ON CREDIT HOLD	Yes	ENABLE NEGATIVE AMOUNT	No
IS AP TRANSACTION	No		

Add/Edit Active Service

Pathway: Accounts (Customer Service screen) > Active Services section

- o If the selected Service Code has the "Enable Recurring Minimum" option enabled, a "Minimum Per Month" field will appear on the Add/Edit Active Service screen.
- o When a Minimum Per Month is applied to an active service, it will be visible when expanding the service code.

The screenshot shows the 'ADD ACTIVE SERVICE' form with the following fields and values:

REASON CODE	ADD-New Business	START DATE	10/16/23 Monday	Week 42 (A)										
QTY	1	EQUIPMENT	10 Yard Roll Off	SERVICE CODE	10 Yard Open Top Service	FREQUENCY	1x per week	PER UNIT	0.0000	SERVICE FEES	0.00	month	MINIMUM PER MONTH	

Service Days: Mon Tue Wed Thu Fri Sat Sun

Requested By: [Name]

Service Note: [Text]

Work Order: RO Delivered

Recurring Minimum: \$ 85.00 per month

Reason: ADD-New Business

Posted By: Aliena Somers on 10/16/2023

Calendar View: October, 2023

SUN	MON	TUE	WED
	Oct 1	Oct 2	Oct 3
	Oct 8	Oct 9	Oct 10

Order Processing

Pathway: *Accounts > Order Processing*

- When a Recurring Minimum is applied to an active service, it will be visible when expanding the service changes for the account in Order Processing.

The screenshot shows the 'Service Changes' tab in the Order Processing interface. It displays a table of services with columns for SUBMITTED DATE, ACCOUNT, and EFFECTIVE DATE. A red arrow points to the 'Recurring Minimum: \$ 85.00 per month' field for a service with the account name 'Roll Off Service Minimum Charge'.

DIVISION	STATUS	SOURCE	LOB	SHOW ON HOLD	LOAD
All	All Open	Service Add/Change	Commercial, Docun	<input checked="" type="checkbox"/>	LOAD
SUBMITTED DATE	ACCOUNT	EFFECTIVE DATE			
05/10/23 1:03pm Matt lori gmail Eck...		11/17/24			
07/14/22 11:19am House Acct non Sys...		07/19/24			
10/10/23 6:25pm House Account		10/01/23			
09/29/23 5:42pm House Account	Roll Off Service Minimum Charge 1234 W Little York Rd, Houston	09/29/23			
New: 1 10 Yard Open Top Minimum Charge 2x per week \$ 500.00 per month N/A					
Recurring Minimum: \$ 85.00 per month					
Note: Requested Days (TH T) Delivery Work Order: .09/29/2023					

Proposals/Contracts

Pathway: *Accounts (Customer Service screen) > Orders, Quotes and Contracts*

- If the selected Service Code has the "Enable Recurring Minimum" option enabled, a "Minimum Per Month" field will appear on the Add/Edit Service screen for the proposal/contract.
- When a Minimum Per Month is added, it will be visible upon expanding the service code for the proposal/contract.

The screenshot shows two overlapping windows. The top window is 'ADD SERVICE' with fields for QTY, EQUIPMENT, SERVICE CODE, FREQUENCY, PER UNIT, SERVICE FEES, and MINIMUM PER MONTH. The bottom window is 'EDIT PROPOSAL - 3886' showing a table of services with a 'Recurring Minimum: \$ 200.00 per month' field highlighted by a red arrow.

QTY	EQUIPMENT	SERVICE CODE	FREQUENCY	PER UNIT	SERVICE FEES	MINIMUM PER MONTH
1	10 Yard Roll Off	10 Yard Open Top Service	1x per week	0.0000	0.00 month	200.00

SERVICE DAYS	SITE ID	START DATE	QTY	SERVICE CODE	FREQUENCY	RATE	VENDOR RATE
Mon	48969001		1	10 Yard Open Top Service	1x per week	\$ 0.00	month
Recurring Minimum: \$ 200.00 per month							
Total						\$ 0.00	\$ 0.00

Sales Management

Pathway: Sales > Sales Management

- If a contract includes a Recurring Minimum for a service, it will be visible on the Sales Management screen when the site is expanded.

SALES REP	AUTHORIZATION PENDING	CONTRACT REVIEW PENDING	CONTRACT REVIEW COMPLETE	COMMISSION REVIEW PENDING	EXCLUDED FROM COMMISSION	COMMISSION REVENUE	COMMISSION AMOUNT
House Account	\$ 0.00 2	\$ 192.00 2	\$ 0.00 0	\$ 34,598.0099 14,456	\$ 0.00 0	\$ 120.00 1	\$ 615.00 2
	\$ 0.00 0	\$ 244.50 3	\$ 0.00 0	\$ 5,650.73 156	\$ 0.00 0	\$ 0.00 0	\$ 0.00 0
	\$ 0.00	\$ 436.50	\$ 0.00	\$ 40,248.7399	\$ 0.00	\$ 120.00	\$ 615.00

SUBMITTED DATE	ACCOUNT	PROPOSAL #	EFFECTIVE DATE	TERM	RENEWAL	RATE	APPROVAL	SOLD BY
	Site 1_Test	3833	06/22/23	24	0	\$ 0.00		Aliena Somers
	Staples Center	3886	10/16/23	12	12	\$ 0.00		Aliena Somers

Guarantee Months: 0 Increase Limit: 0%
 1x per week \$ 0.00 per month \$ 0.00 c/y
Recurring Minimum: \$ 200.00 per month

Signed proposal does not exist Service Agreement not countersigned

REVIEWED ✓ REJECT ✗

Operations - Holiday Schedule Editor Updated (14371)[Enhancement]

Previously, when making changes to a holiday schedule item, only the "From Date" field was accessible for editing. This feature has been enhanced to include an editable "To Date" field as well.

HOLIDAY SCHEDULE SETUP		SETUP > OPERATIONS > HOLIDAY SCHEDULE	
NAME	NOTE		
Company Meetings			
Christmas			
St Patricks Day			
Rolloff Schedule			
Commercial Schedule			

UPDATE HOLIDAY SCHEDULE ITEM			
NAME	Christmas		
FROM DATE	12/25/2023		
TO DATE	12/25/2023		
NOTE			

NAME	FROM DATE	TO DATE	NOTE
Christmas	12/25/23	12/25/23	
Christmas 2024	12/25/24	12/25/24	

Pathway: Setup > Operations > Holiday Schedule

Operations (Setup) - Validation Message Updated in Manifest Consolidation Eligible Setup (14640) [Enhancement]

The validation popup that appears when a user incorrectly attempts to add a charge code has been updated with

new wording.

- **Previous:** First add selected Charge Code by clicking Plus (+) sign.
- **New:** Charge Code must be added by clicking (+) before editing settings.

The screenshot shows the 'MANIFEST CONSOLIDATION ELIGIBLE SETUP' interface. At the top, there are dropdown menus for 'DIVISION' (CORPUS), 'DISPOSAL LOCATION' (GULLEY HURST LF-CUST PD), and 'LOB' (Medical Waste). Below these are columns for 'CHARGE CODE' and 'MATERIAL TYPE'. A table lists various charge codes and their corresponding material types. A blue 'VALIDATION' dialog box is overlaid on the table, containing the text: 'Charge Code must be added by clicking + before editing settings.' and an 'OK' button.

CHARGE CODE	MATERIAL TYPE
18 Gal Box Per Pound	
18 Gal Box Per Container - RMW	Reg Medical Waste
18 Gal Sharp Per Container - RMW	
200 Gal Cart Per Container - RMW	
30 Gal Box Per Pound - RMW	
30 Gal Box Per Pound - Chemo	
30 Gal Box Per Container - RMW	
30 Gal Box Per Container - Chemo	Chemo
30 Gal Box Per Container - Pharma	PHARMA
43 Gal Reusable Per Container - RMW	Reg Medical Waste
43 Gal Reusable Tiered - RMW	Reg Medical Waste

Pathway: Setup > Operations > Manifest Consolidation Eligible

Accounting (Tax Region) - ERP ID Field Displays if Enabled in 'System Options Setup' (15843) [Enhancement]

If the 'Enable ERP Integration' is set to 'Yes' in System Options Setup, an ERP ID field will display in Tax Region Setup.

The screenshot shows two parts of the system. The top part is 'SYSTEM OPTIONS SETUP' with tabs for System, Sales, Integration, Account, Operations, Account Portal, Broker, and Online Order. The 'Integration' tab is selected, and the 'ENABLE ERP INTEGRATION' dropdown is set to 'Yes'. The bottom part is 'TAX REGION SETUP' showing a table of tax regions. The 'ERP ID' column is highlighted in yellow, and a red arrow points from the 'ENABLE ERP INTEGRATION' field to this column.

TAX REGION ID	NAME	MAP AREA	ERP ID	ACTIVE
1000	AUSTIN CITY-MTA-ETGW		12345-678	Yes
1001	BLANCO ESD 1 BSLD			Yes
1002	BLANCO CO ESD 2 BSLD			Yes
1003	COMAL CO ESD 7			Yes
1004	CALDWELL COUNTY			Yes
1005	CALDWELL CO ESD 1-A			Yes
1006	CALDWELL CO ESD 2			Yes
1007	CALDWELL-HAYS ESD 1A			Yes
1008	COMAL CO ESD 6			Yes
1009	AUS-COMAL ESD 3 CLLD			Yes

Pathway: Setup > System > System Options; Setup > Accounting > Tax Region

Customer Portal

Portal - Payment Notification Logic Updated (15801)[Enhancement]

The payment notification logic has been enhanced for payments made through the Account Portal. Now, payment receipts will be sent to the portal user who initiated the payment.

REFERENCE #	DUE	AMOUNT	BALANCE	PAYMENT
Invoice 883798	07/19/23	\$ 3,981.28	\$ 3,981.28	\$ 3,981.28

Select Where to Apply

Unapplied Payments / Credits \$(250.00)

Account Balance Due \$ 3,731.28

Add Payment Method

*Payment Method: Test - 3123 (Checking)

Note: Test

Prepayment Amount (optional): 1.00

Payment Total: \$ 3,982.28

Process Payment

Payment Terms and Conditions

Pathway: Portal > Make a Payment

Portal - Enhancement to Allow Customers to View Service History for Inactive Sites (15557)[Enhancement]

The Account Portal has been updated to grant users of an inactive site access to view service history information, associated photos, manifests, and report attachments. Other options, such as the ability to create a request or view AR information, are not available.

Access to inactive sites is determined by the account class to which the site belongs. When the 'Enable Viewing Inactive Site' field in the Account Portal tab is set to "Service History Only," portal users will have restricted access upon logging in.

