Release Version 70 [Archive]

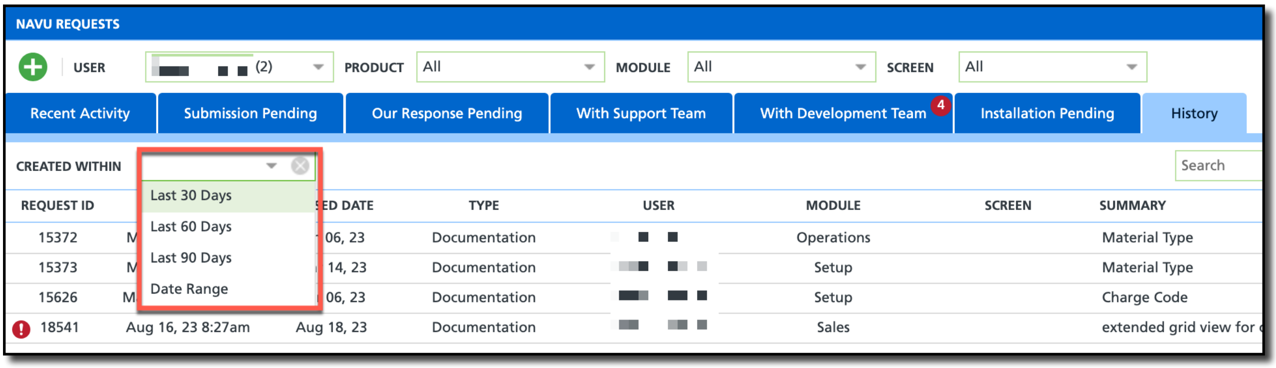
Last Modified on 08/06/2025 7:58 am PDT

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

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.

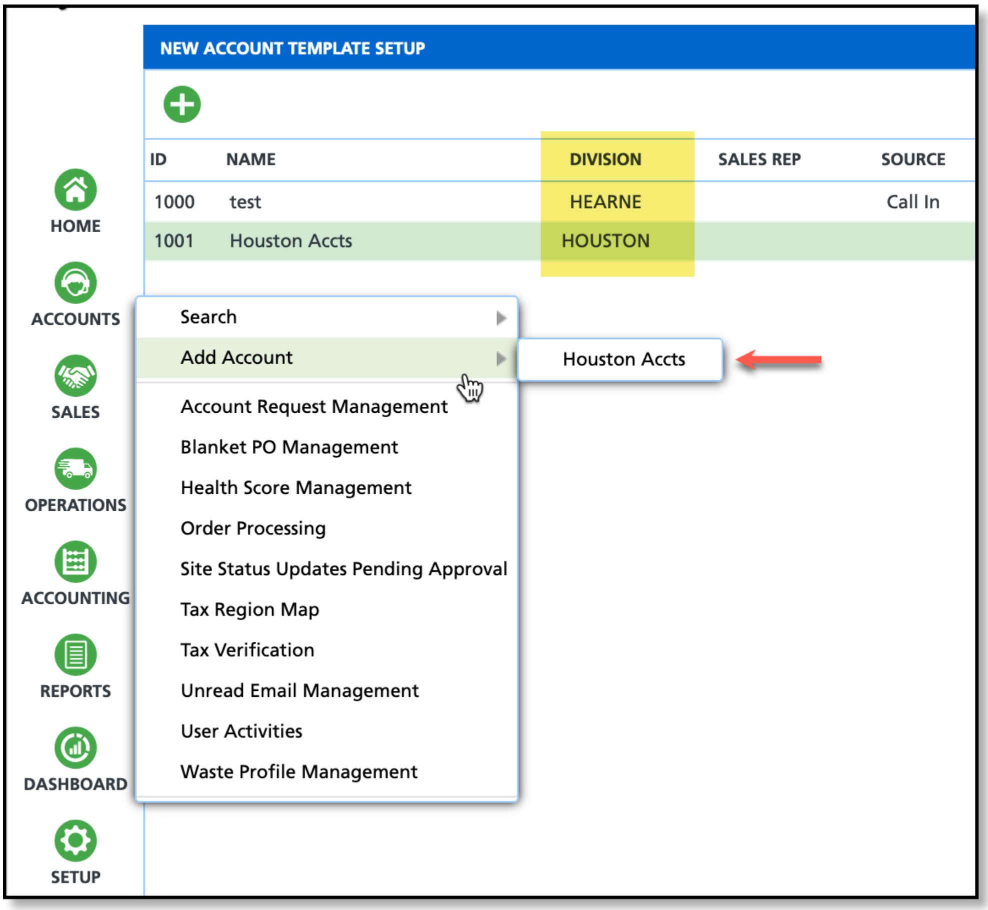


Pathway: *Navu Requests*

Accounts

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

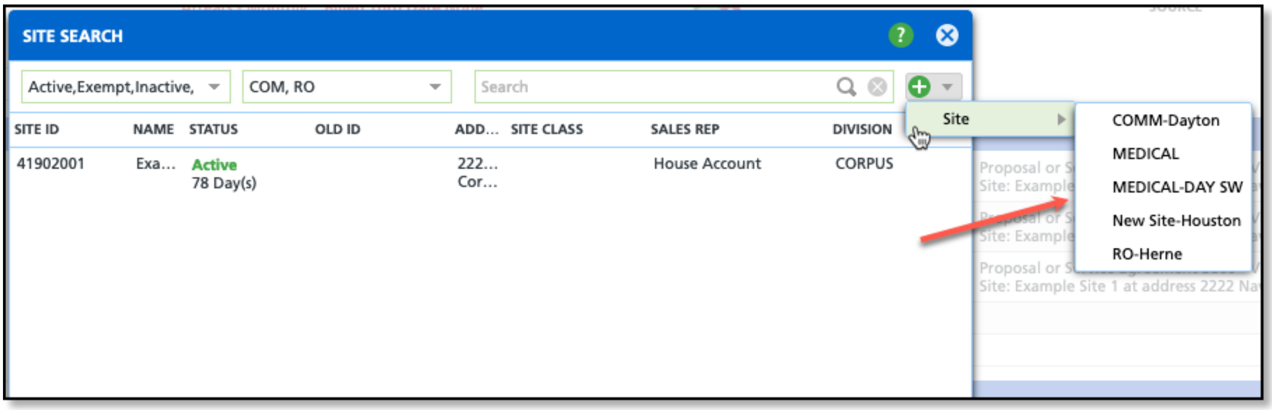
Logic has been updated to the Add Account Templates to restrict access based on the user's division access (assigned on their user account). If the template does not have a division assigned, it will continue to be visible to all users.



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.

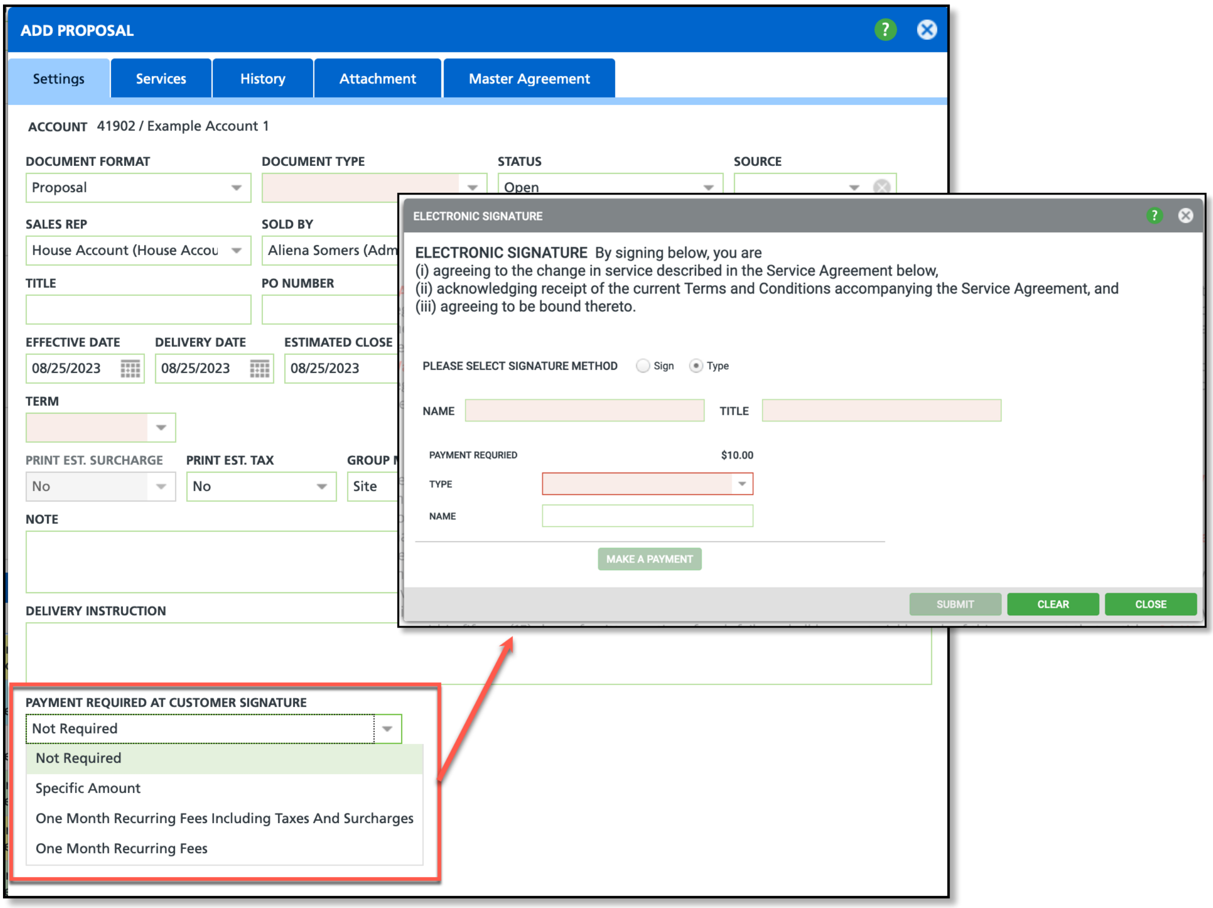


Pathway: (Setup) *Setup > Account > New Site Template;* (Use) *load Account > Site Search*

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

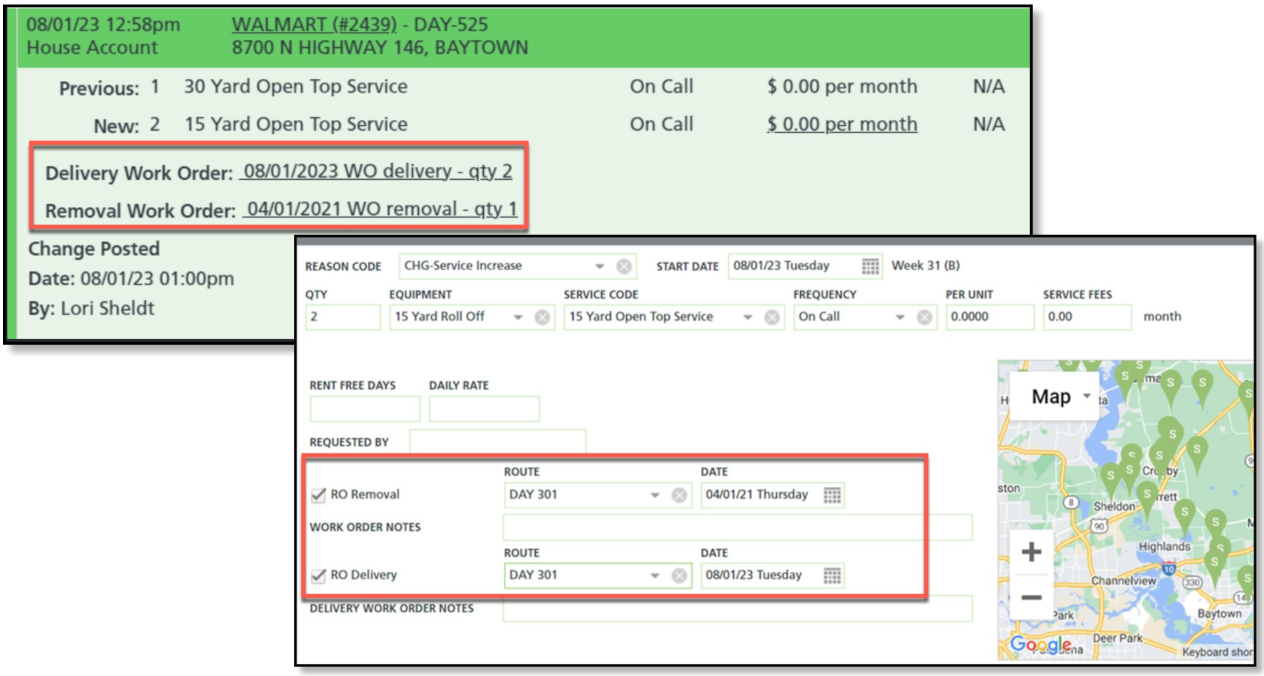
The "Require Deposit Amount" field on the Add Proposal screen has been renamed to "Payment Required at Customer Signature" and has been updated to include the following options:

- 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.
- 

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

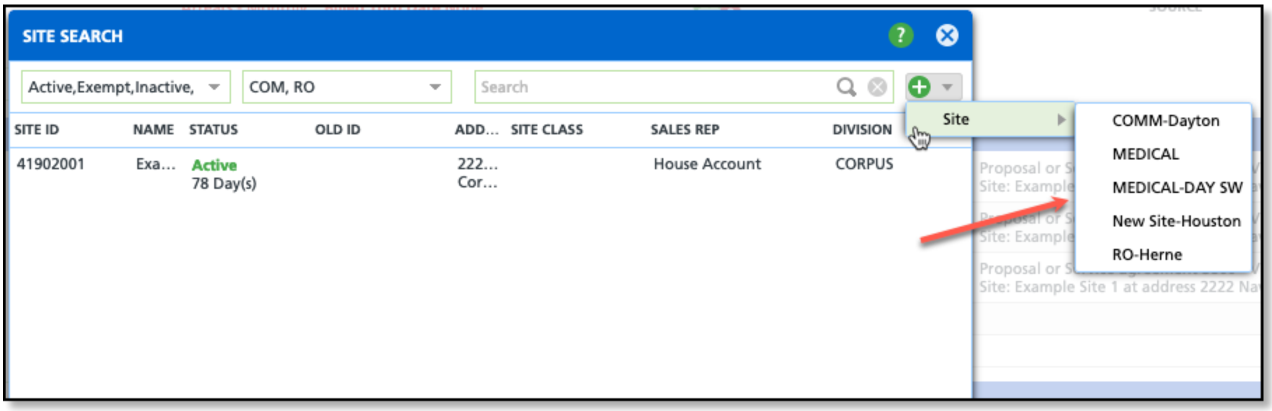
An issue has been resolved that caused a discrepancy between the date and label displayed on the Order Processing screen and what appeared on the work order when a service was edited.



Pathway: *(Load) Accounts > Edit Service*

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

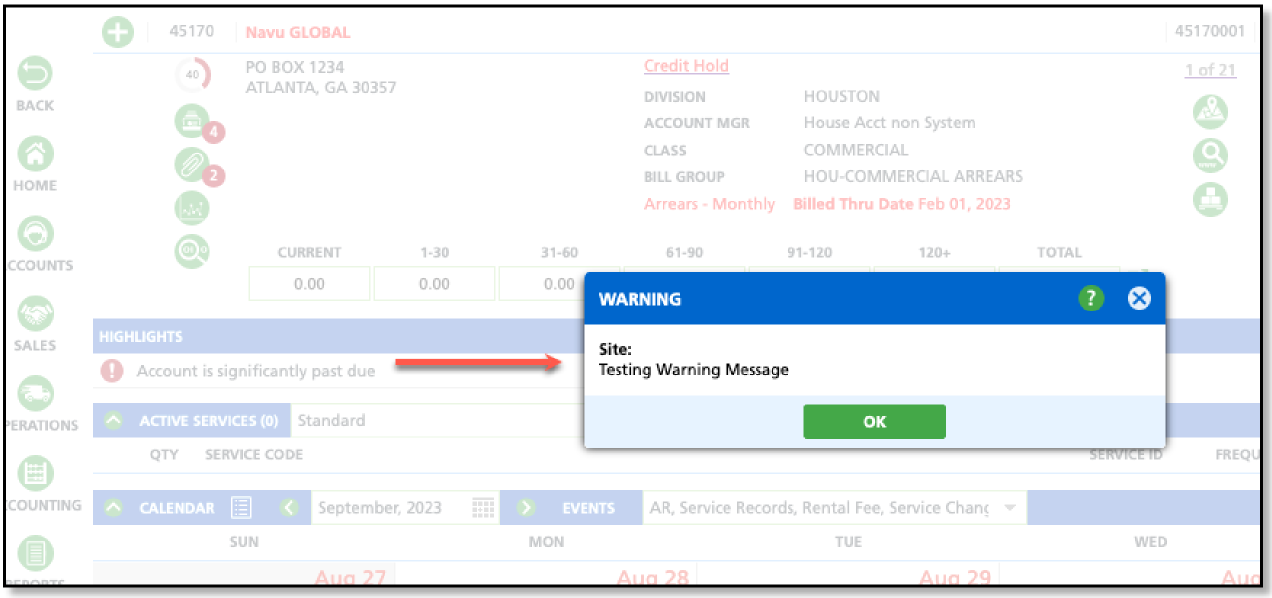
Logic has been updated to the 'New Site Template' to restrict access based on the user's division access (assigned on their user account). If the template does not have a division assigned, it will continue to be visible to all users.



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

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

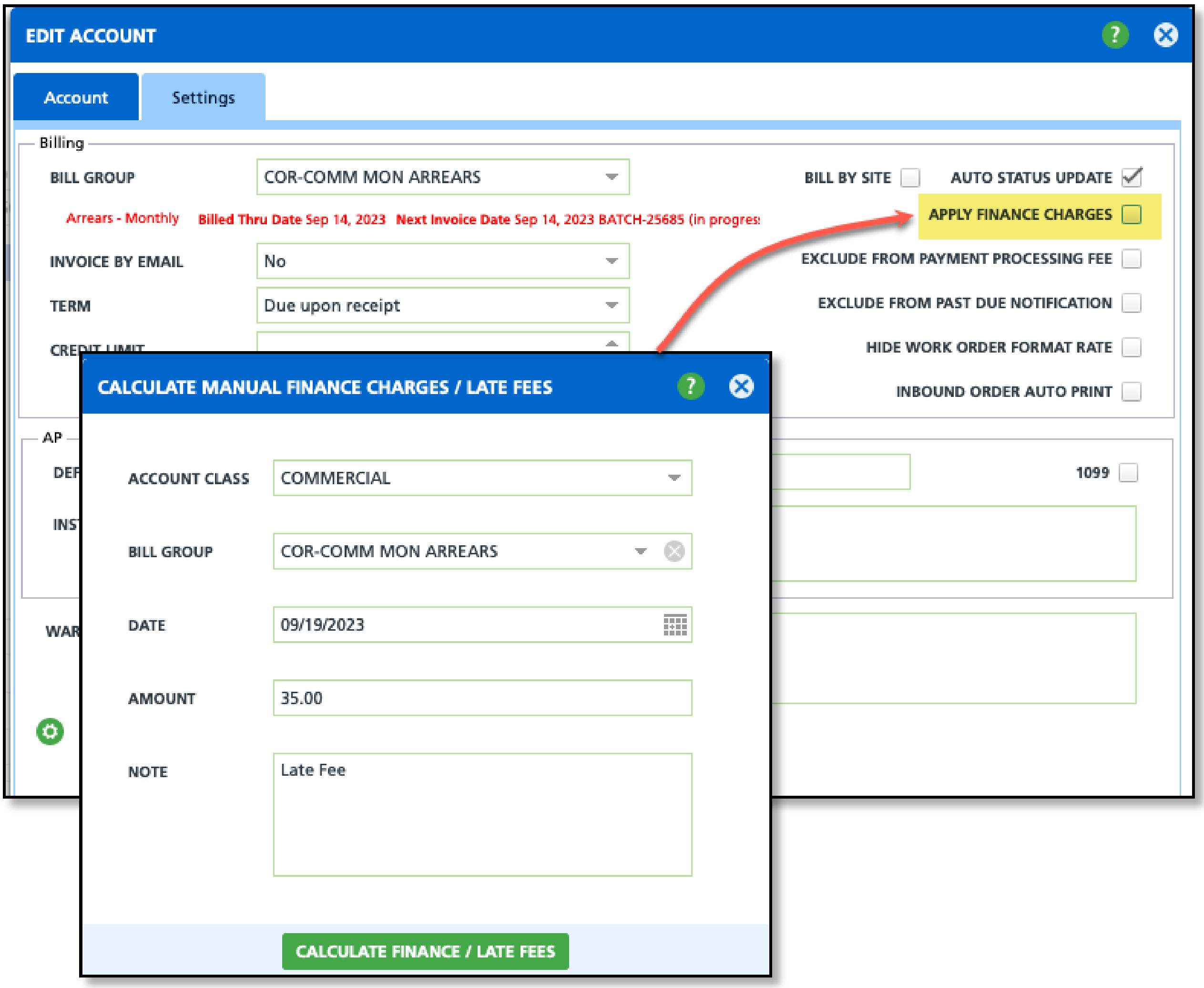
If a site includes a warning message, the popup logic has been updated to prevent the message from reappearing on the screen after user-initiated manual refreshes and system-generated refreshes.



Pathway: *Customer Service Screen (Accounts)*

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

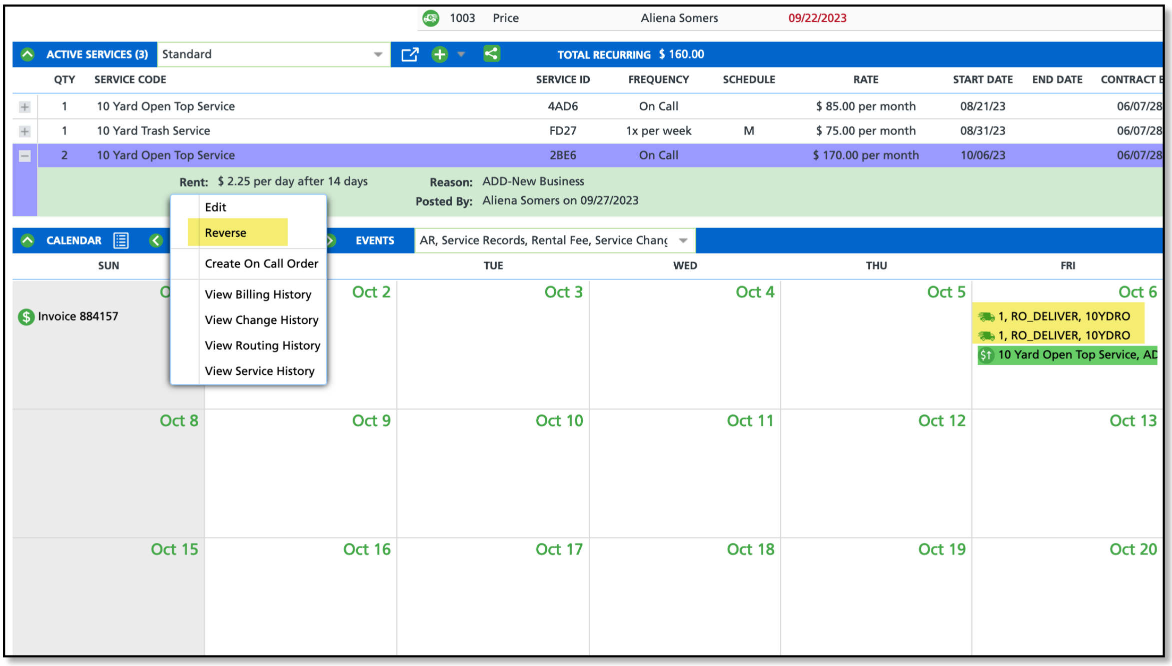
Logic has been updated to 'Calculate Manual Finance Charges and Late Fees' to correctly reference the 'Apply Finance Charges' option in an account's settings. If 'Calculate Manual Finance Charges and Late Fees' is configured, and the account does not have the 'Apply Finance Charges' option selected, 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)

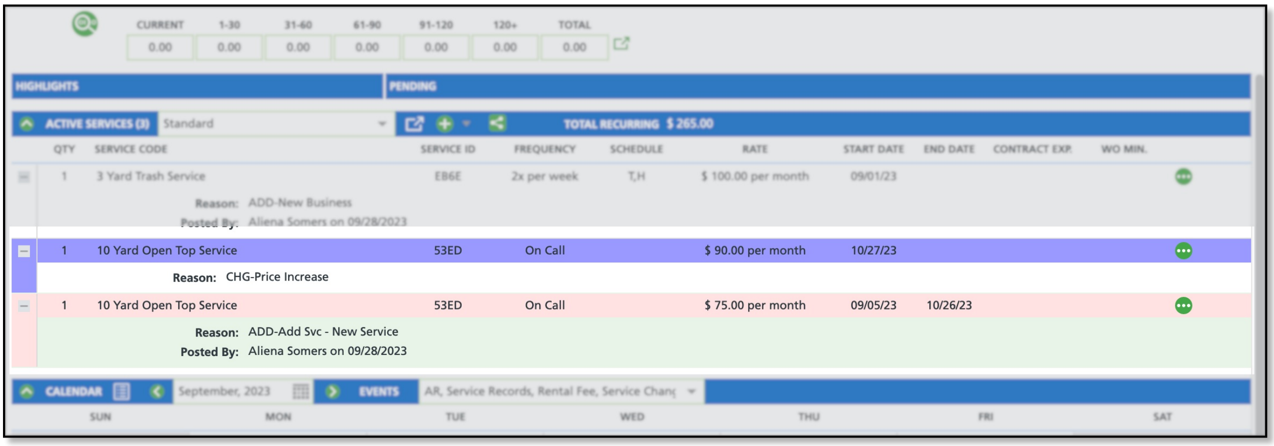
The logic has been modified to restrict a user from reversing a service if it is linked to multiple work orders, and at least one of those work orders has a status other than 'Scheduled.'



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

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

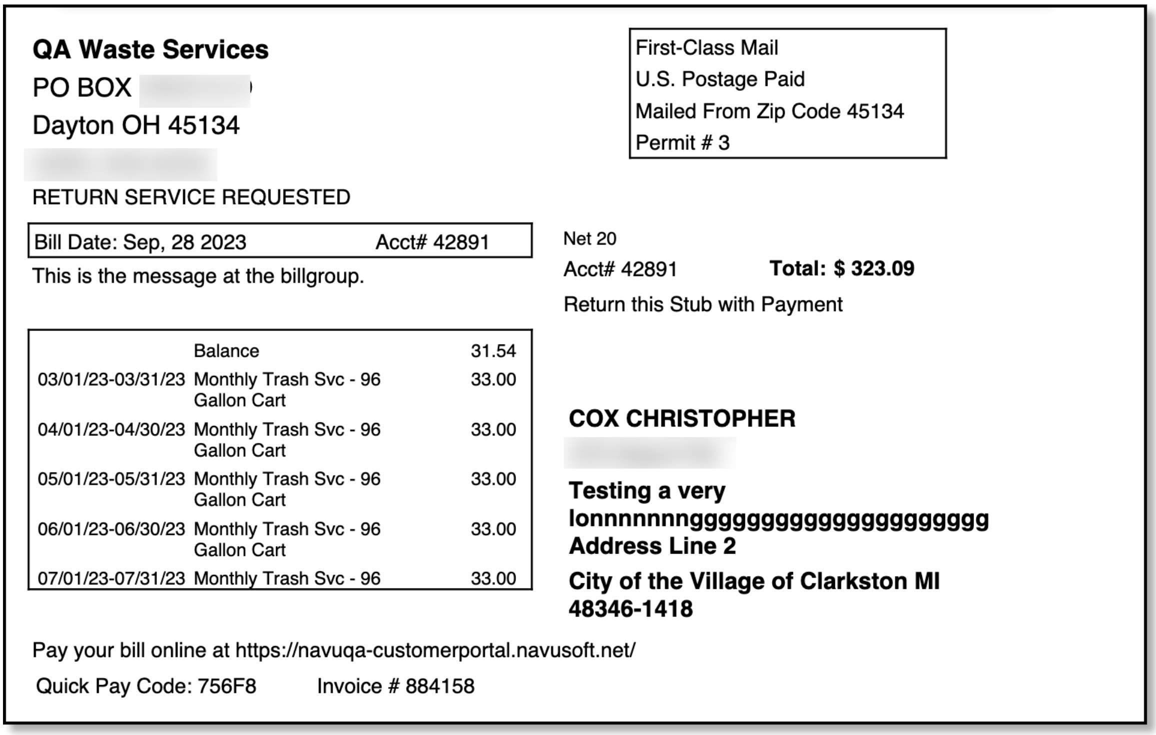
Previously, when there was a future change to work order charge pricing, the new pricing was being used before the effective date of the price change. This has been fixed.



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
Dayton OH 45134

RETURN SERVICE REQUESTED

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

Bill Date: Sep, 28 2023 Acct# 42891
This is the message at the billgroup.

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

	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
lonnnnnnnggggggggggggggggggg
Address Line 2
City of the Village of Clarkston MI
48346-1418

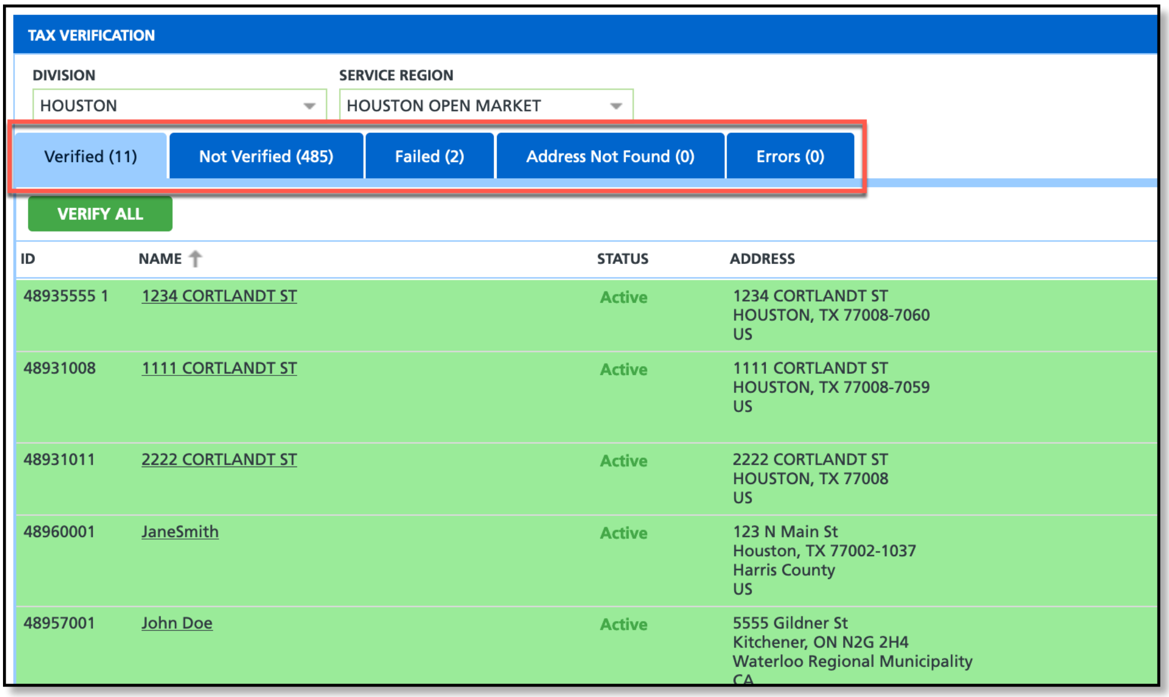
Pay your bill online at https://navuqa-customerportal.navusoft.net/
Quick Pay Code: 756F8 Invoice # 884158

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.

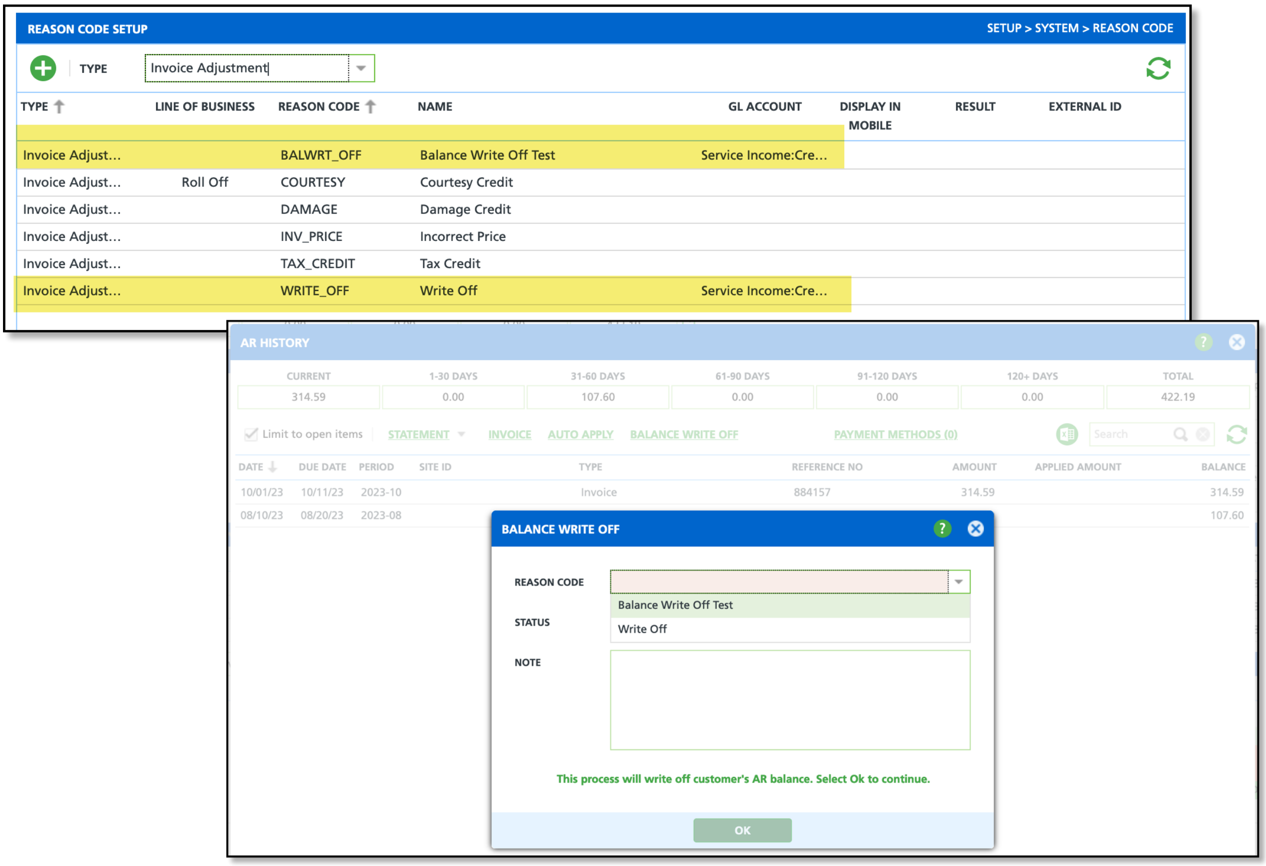


Pathway: *Accounts > Tax Verification*

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.



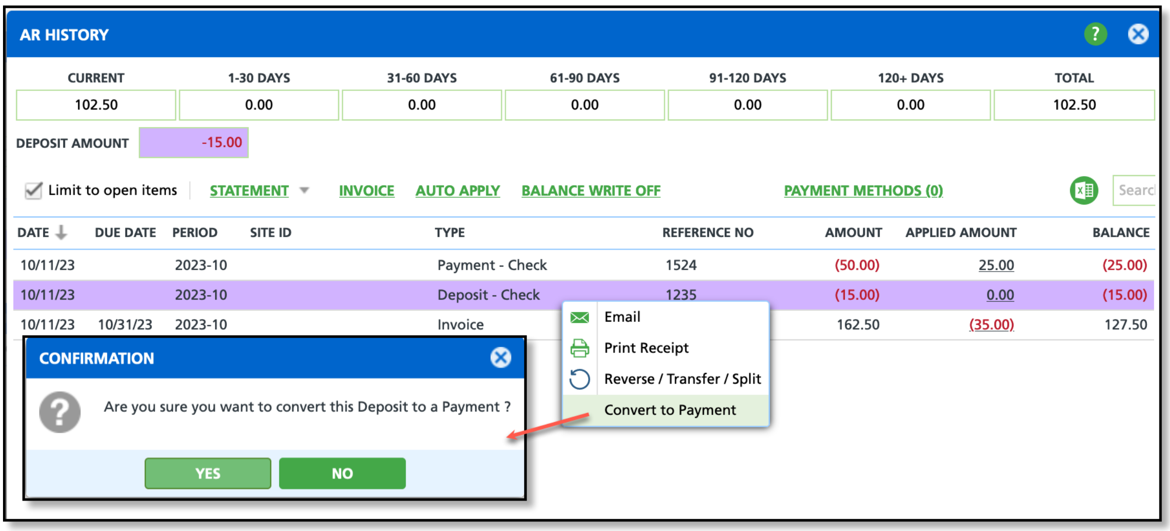
Pathway: *Accounts > AR History*

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

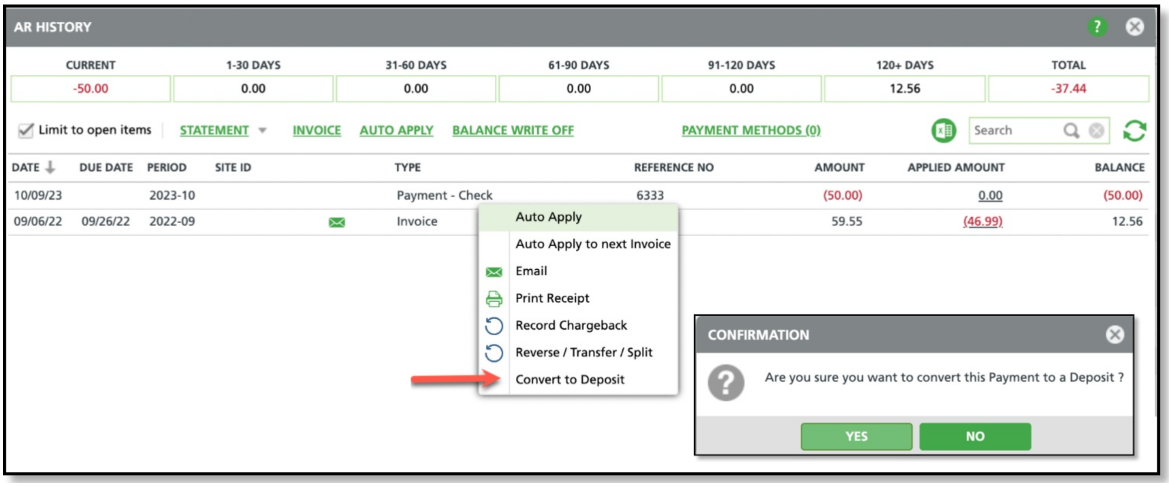
The following changes have been applied to the AR History screen when (options are available upon right-click):

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



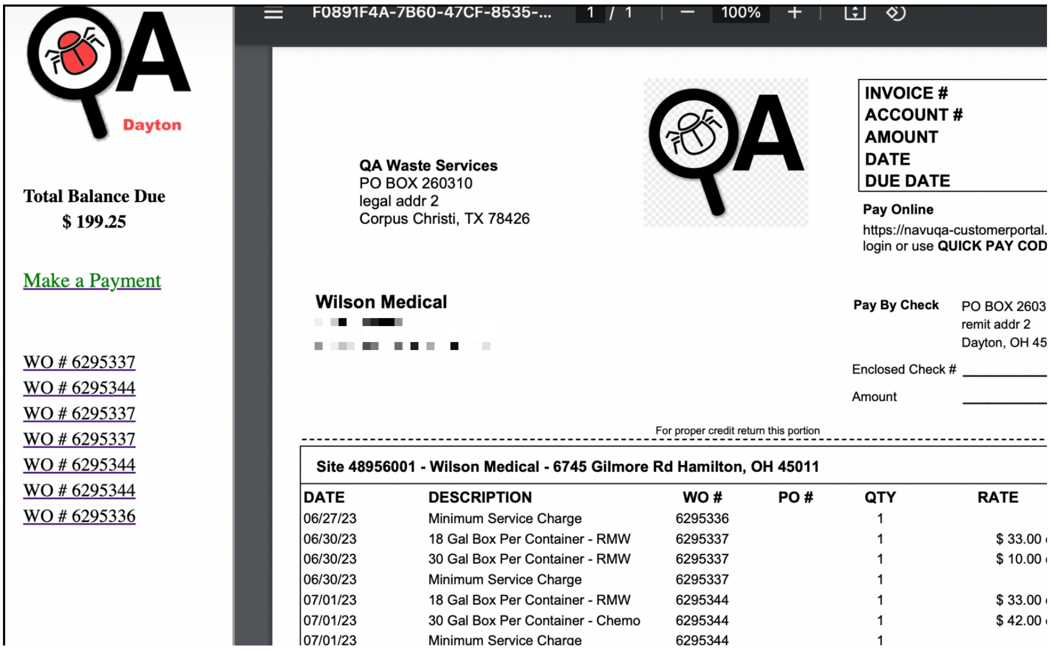
Convert to Deposit Example



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.

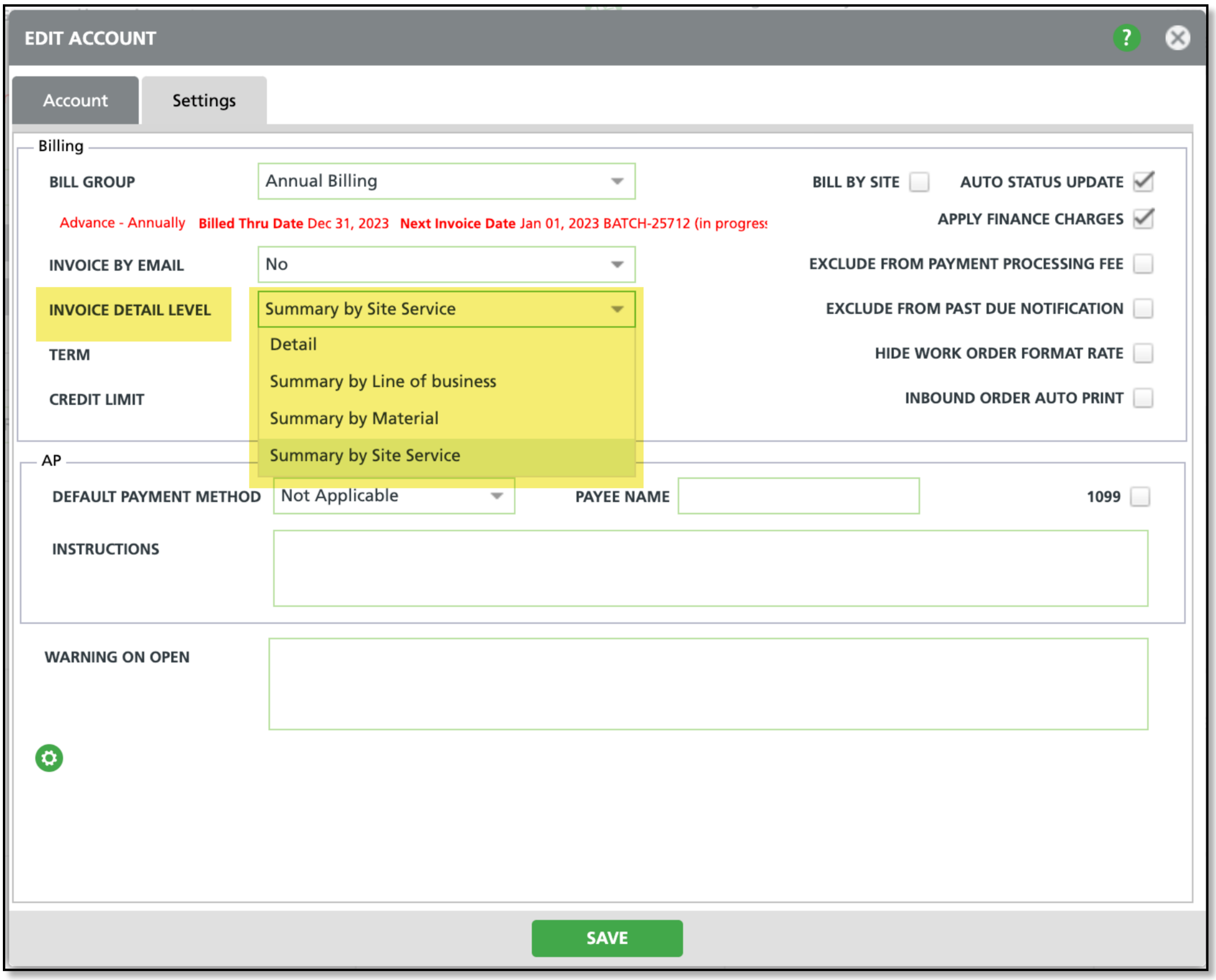


Pathway: *Accounts > Search > Accounts*

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.

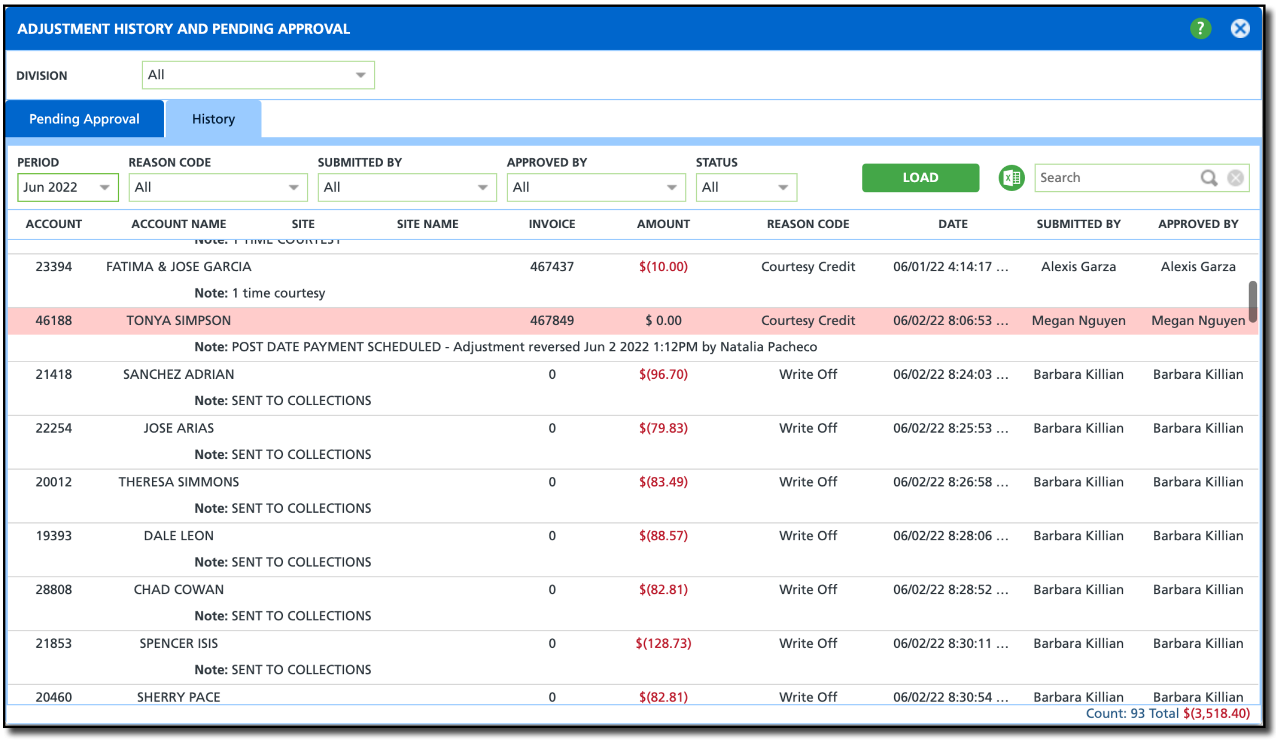
> Please submit a ticket to Navusoft if you would like your invoice to be formatted to use this functionality.



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.

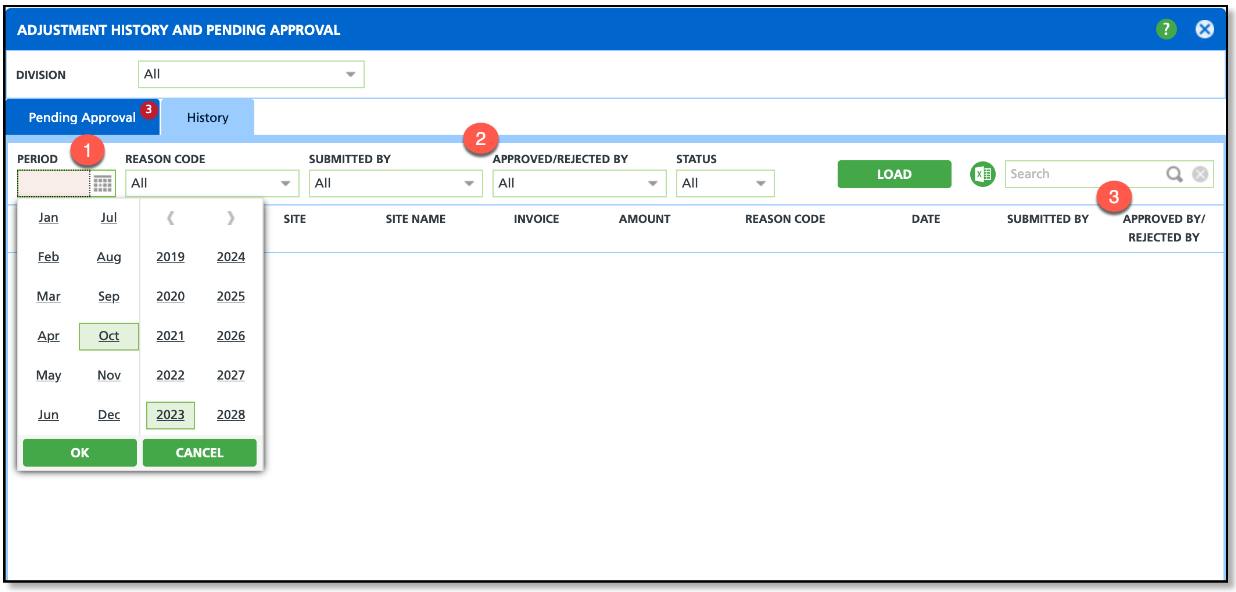


Pathway: *Accounting > Invoice Adjustment - Pending Approval And History*

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

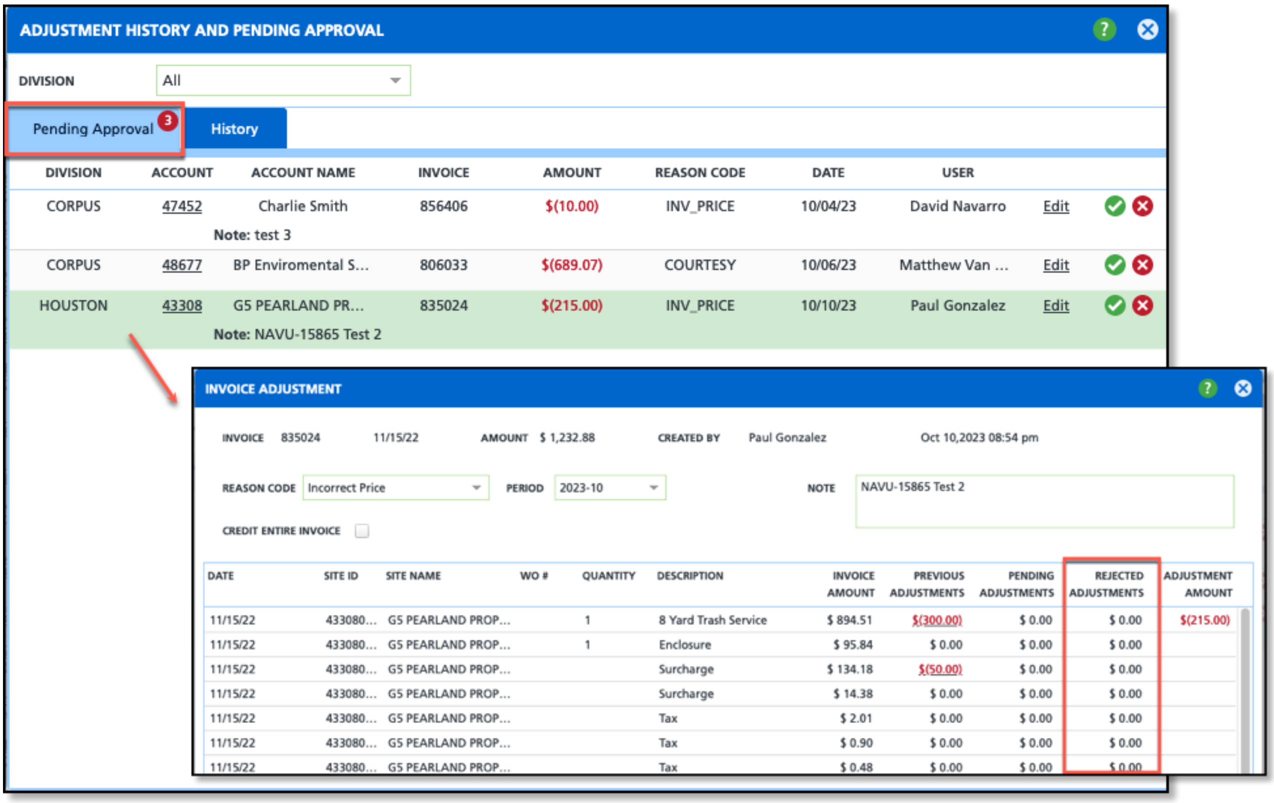
The following changes have been applied to the History tab of the Adjustment History and Pending Approval screen:

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."



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.

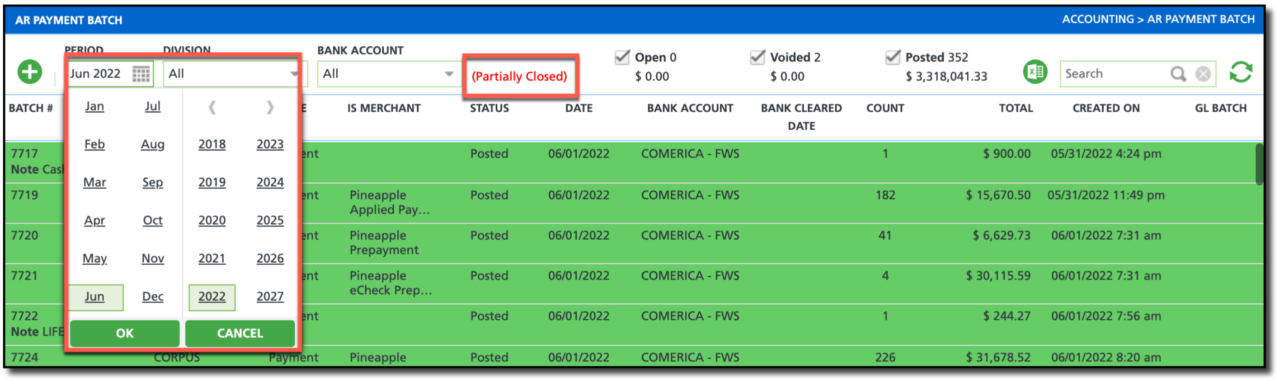


Pathway: *Accounting > Invoice Adjustment - Pending Approval and History*

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

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

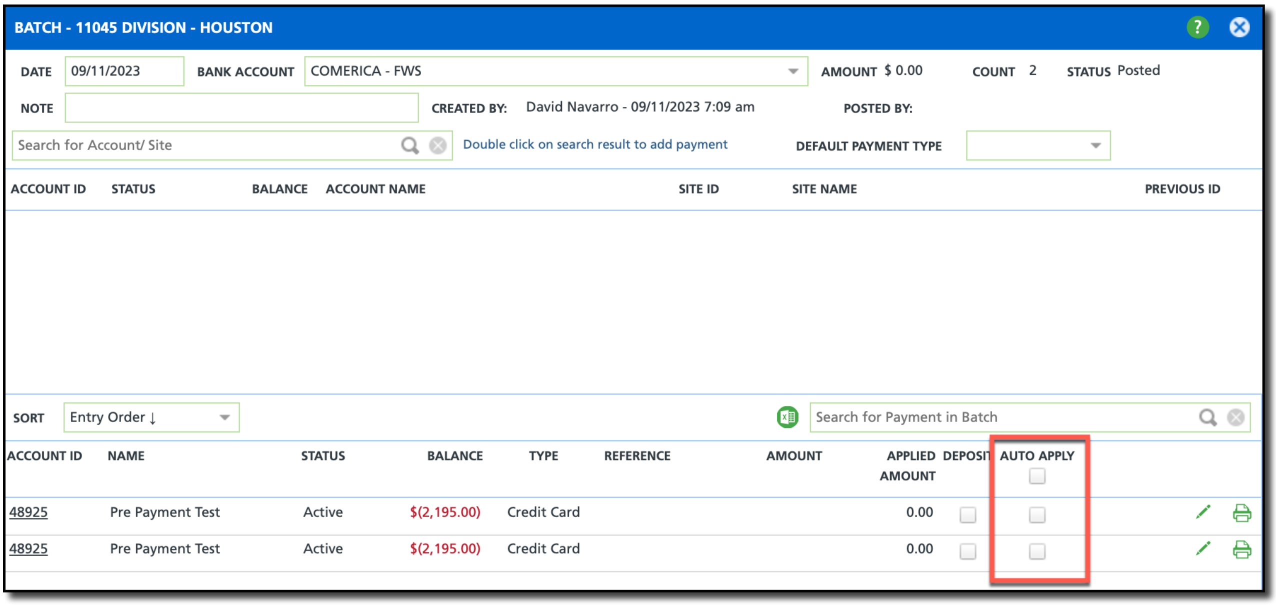
- The previous drop-down Period filter has been updated to display as a month/year picker.
- If the selected time period is closed, 'Closed' will display in red.



Pathway: *Accounting > AR Payment Batch*

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

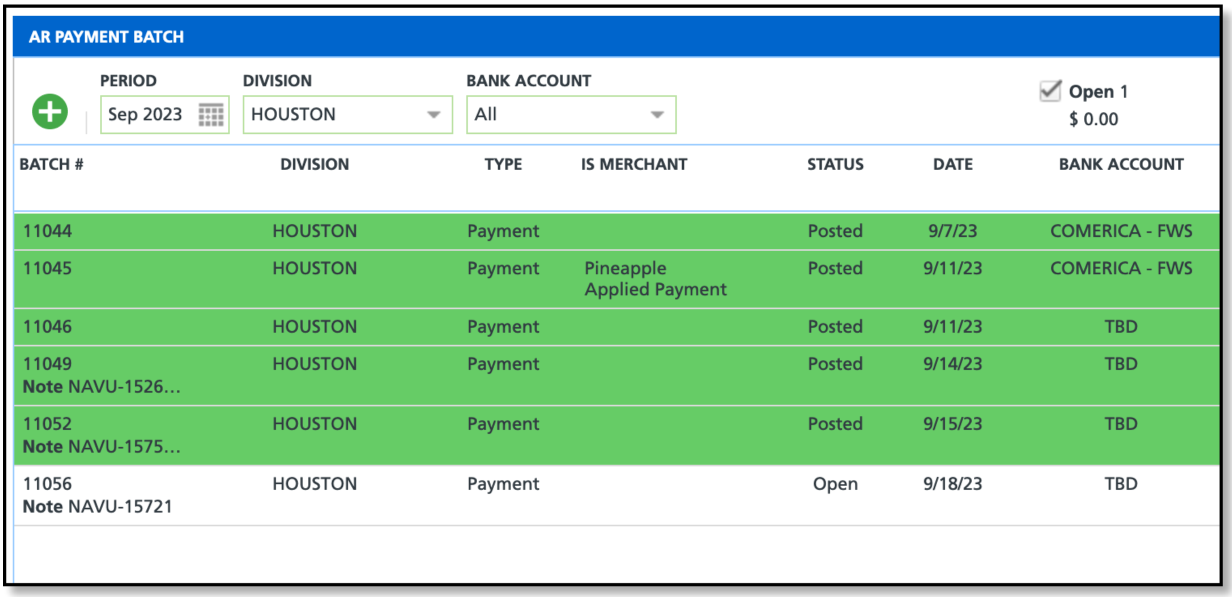
An "Auto Apply" checkbox option has been added to the Batch Details screen in AR Payment Batch for batch imports.



Pathway: *Accounting > AR Payment Batch*

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

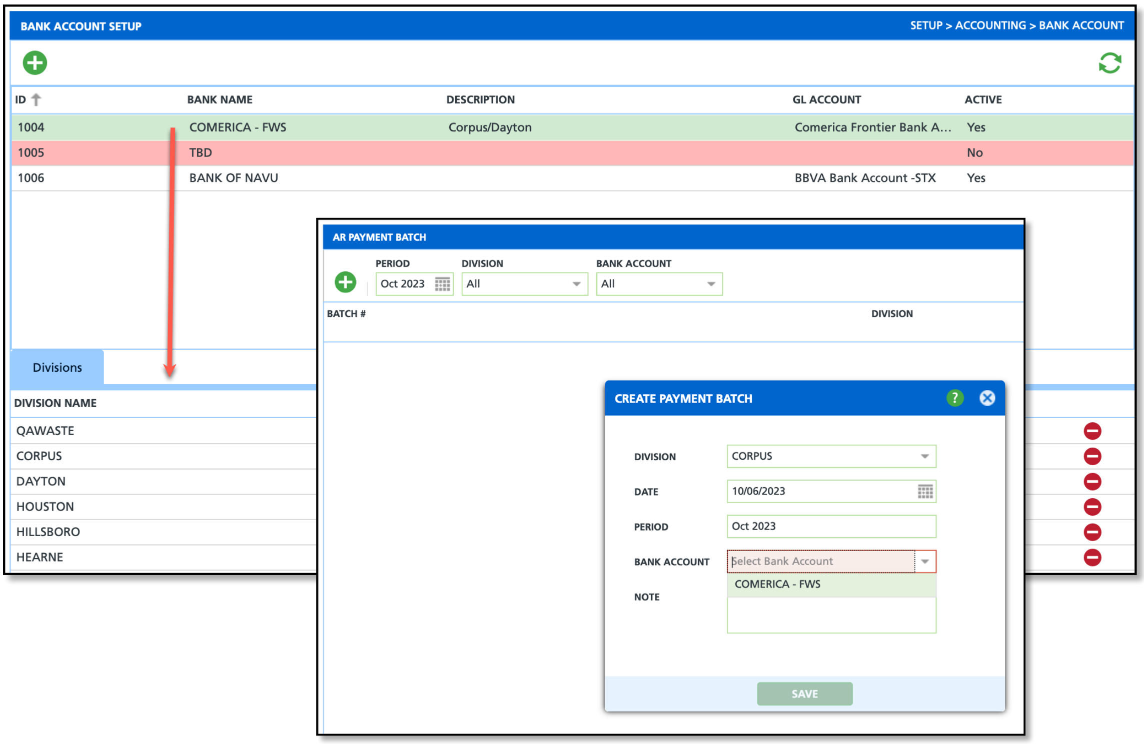
The system's logic for managing payment batches that involve credit card processing has been enhanced. It now provides a "posting successful" message, indicating that payments will continue to process, instead of the error message users received previously.



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]

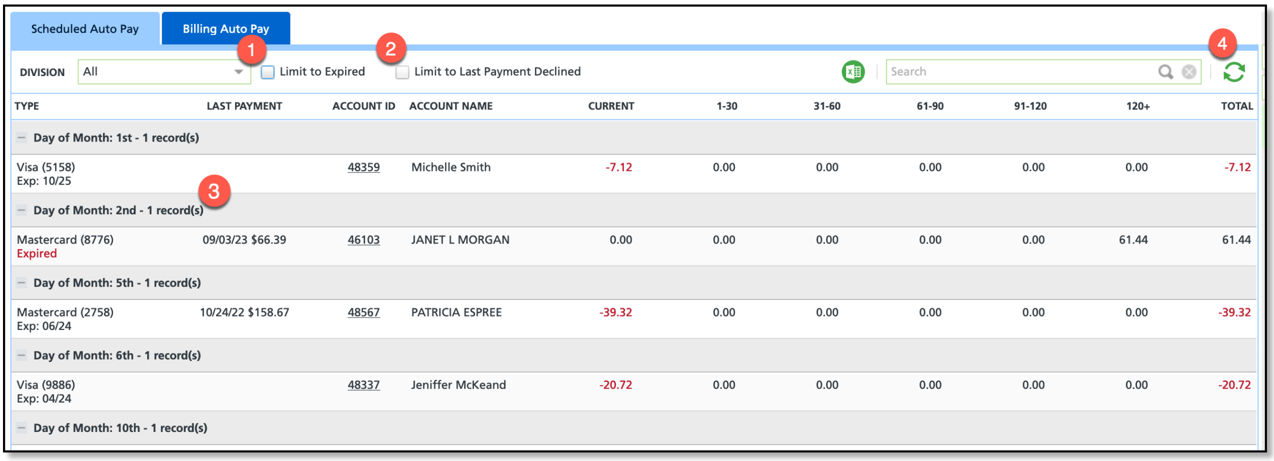
The following screen updates have been applied to the Auto Pay Management screens:

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

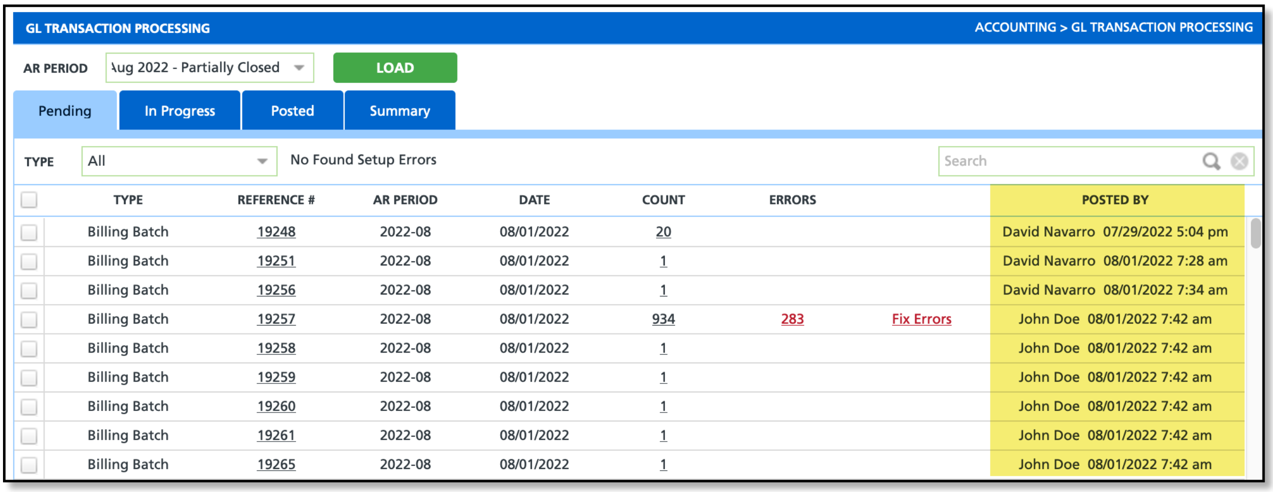
1. 'Auto Refresh' icon added to right of Search.



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.



Pathway: *Accounting > GL Transaction Processing*

Operations

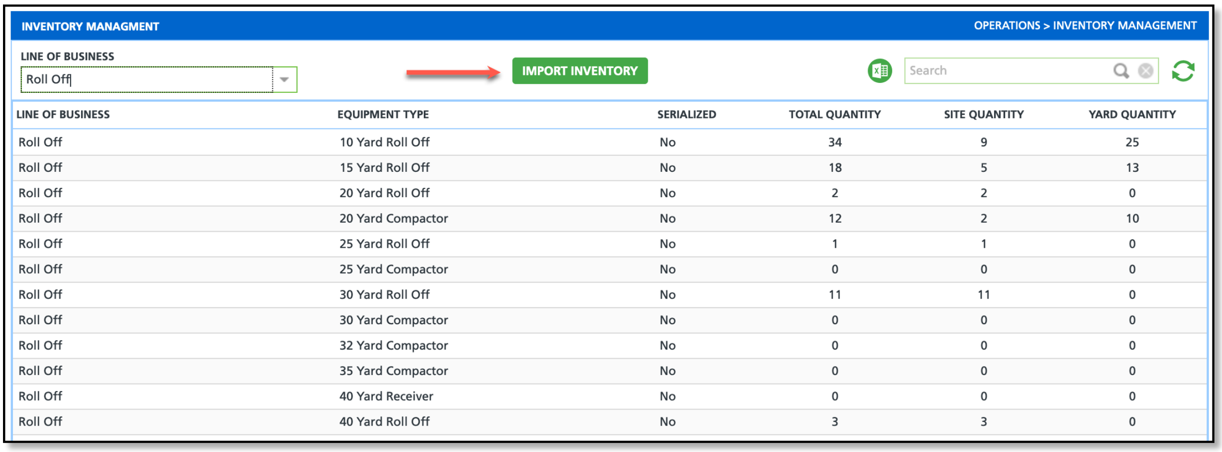
Inventory Management - Import Inventory Functionality Added (15535)[Enhancement]

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

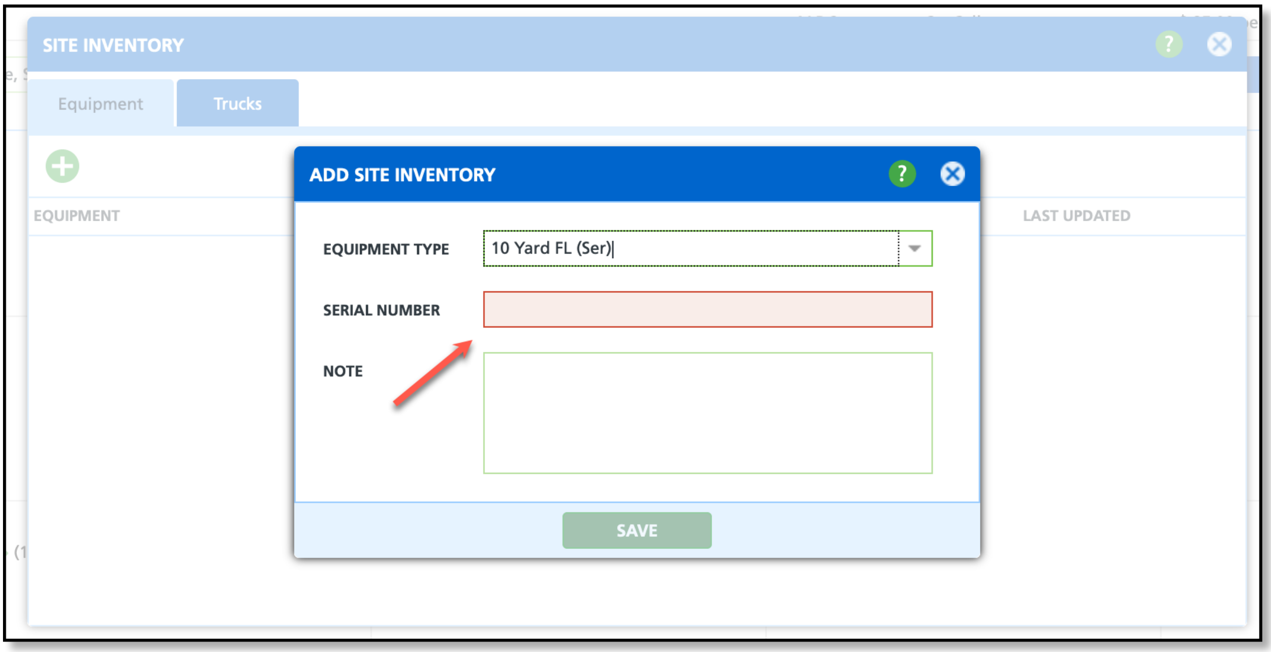


LINE OF BUSINESS	EQUIPMENT TYPE	SERIALIZED	TOTAL QUANTITY	SITE QUANTITY	YARD QUANTITY
Roll Off	10 Yard Roll Off	No	34	9	25
Roll Off	15 Yard Roll Off	No	18	5	13
Roll Off	20 Yard Roll Off	No	2	2	0
Roll Off	20 Yard Compactor	No	12	2	10
Roll Off	25 Yard Roll Off	No	1	1	0
Roll Off	25 Yard Compactor	No	0	0	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*

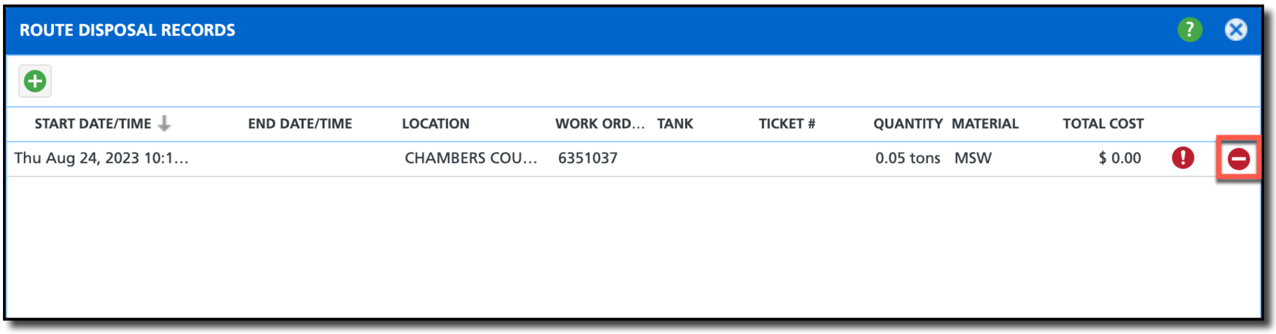
Inventory Management & Site - Logic Updated to Serial Number field (15670)

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]

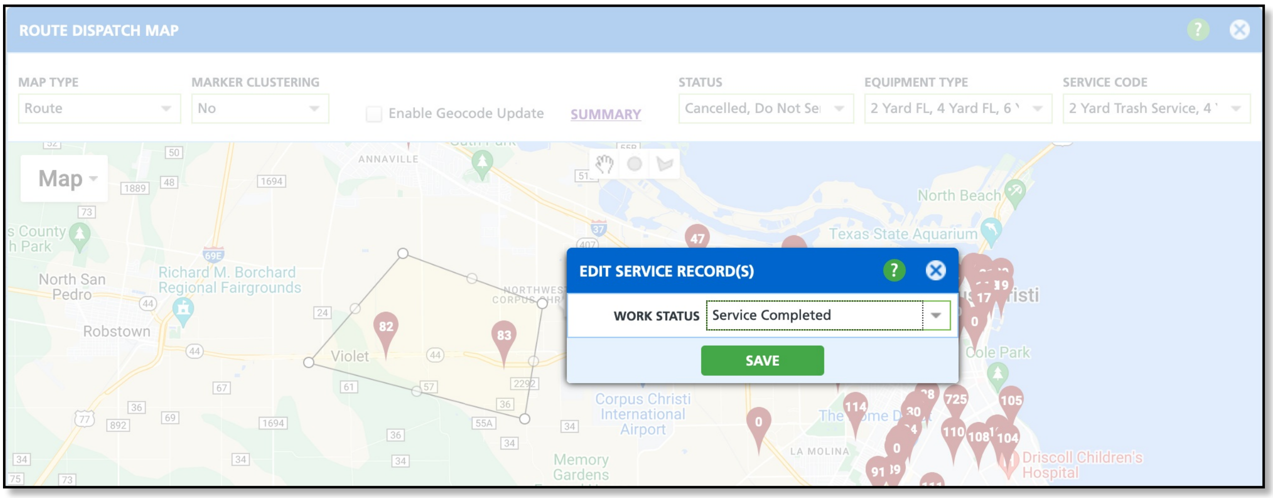
Within the Dispatch screen, the Route Disposal Records now include the option to remove a disposal ticket from the list by selecting the removal icon associated with the ticket.



Pathway: *Operations > Dispatch*

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

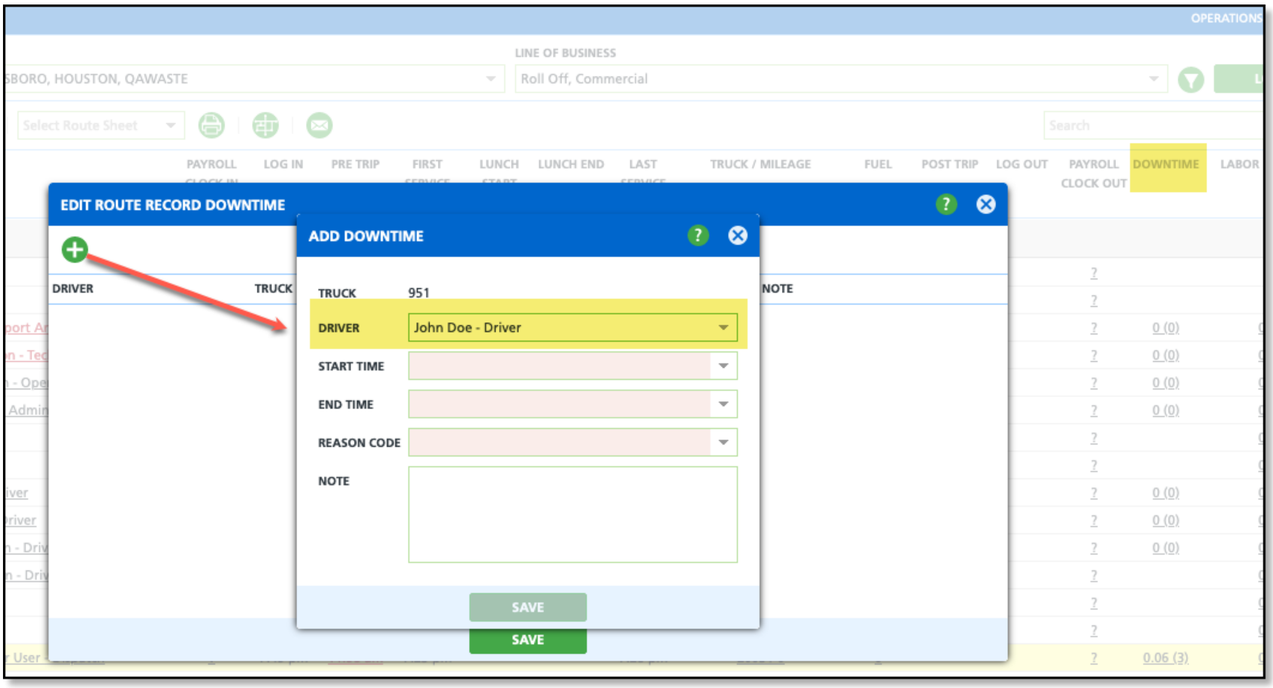
A previous issue with the Route Dispatch Map not allowing users to save a Work Status change when the polygon tool was used has been successfully resolved.



Pathway: *Operations > Dispatch*

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

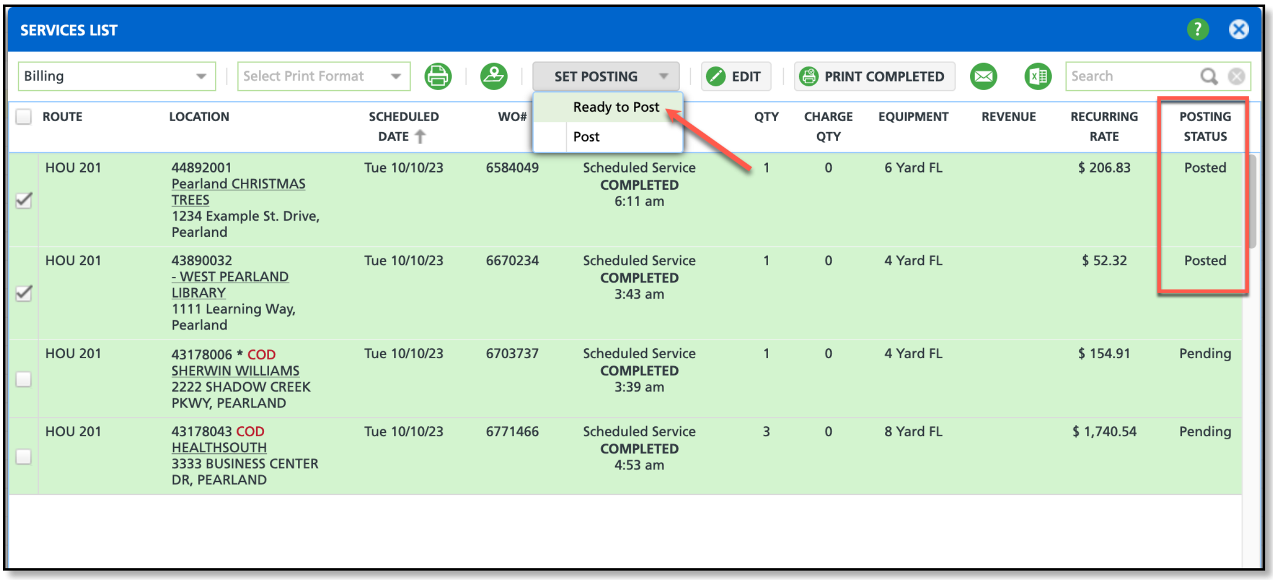
An issue has been resolved in the Add Downtime editor, where it was incorrectly displaying the user's name in the Driver field instead of the driver's name. Additionally, the Driver field has been improved by converting it into a drop down menu, with the default being the driver assigned to the route.



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

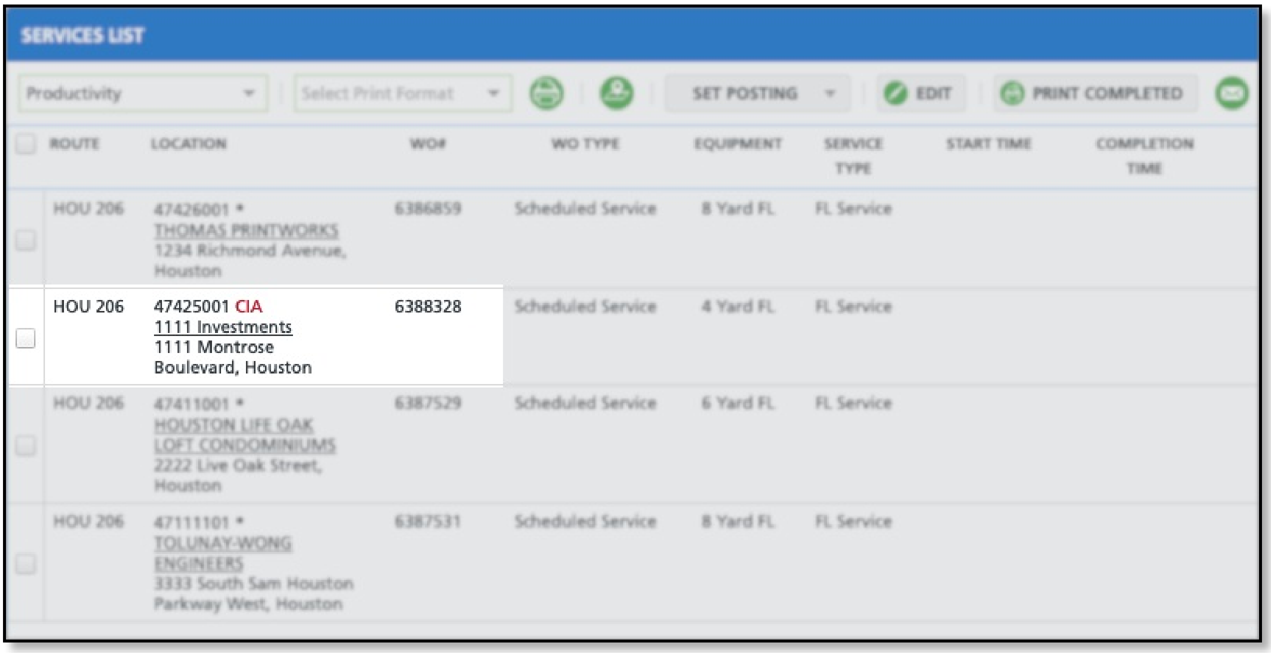
Services List (Dispatch) - Logic Updated to 'Set Posting' for Posted Work Orders (15849)

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 (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.

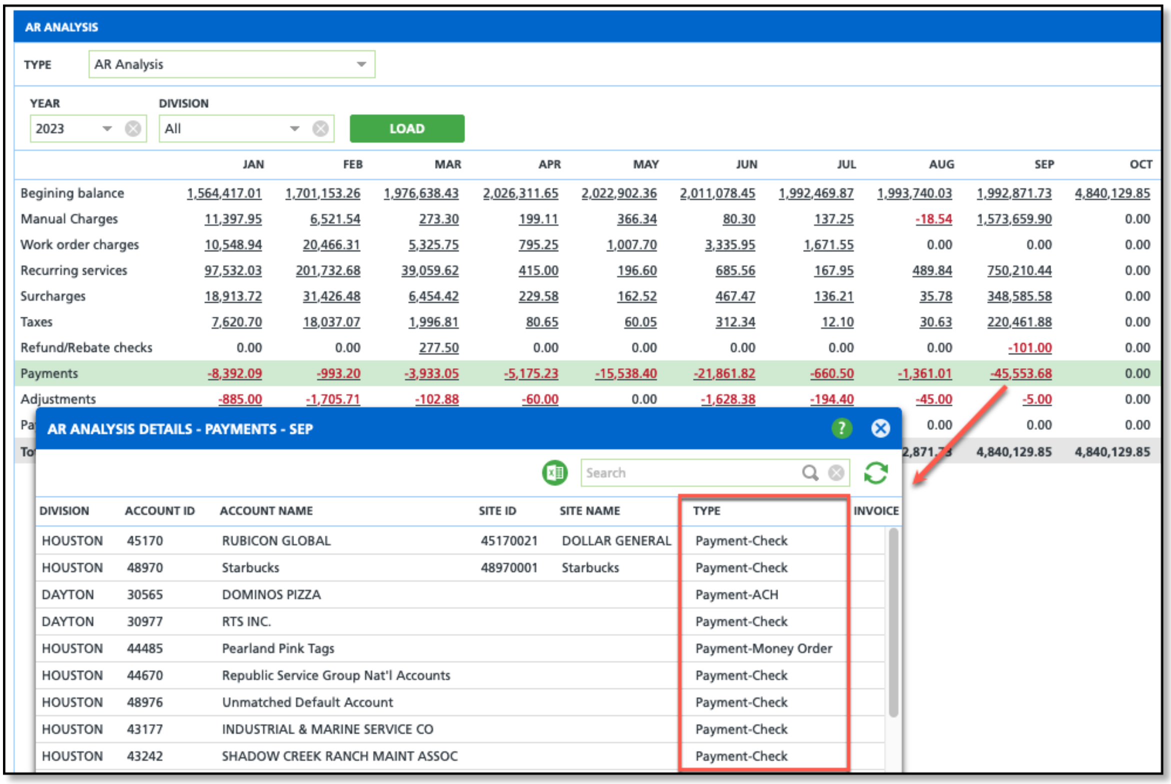


Pathway: *Operations > Dispatch > Services List*

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: 2023 | DIVISION: All | LOAD

	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT
Begining 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

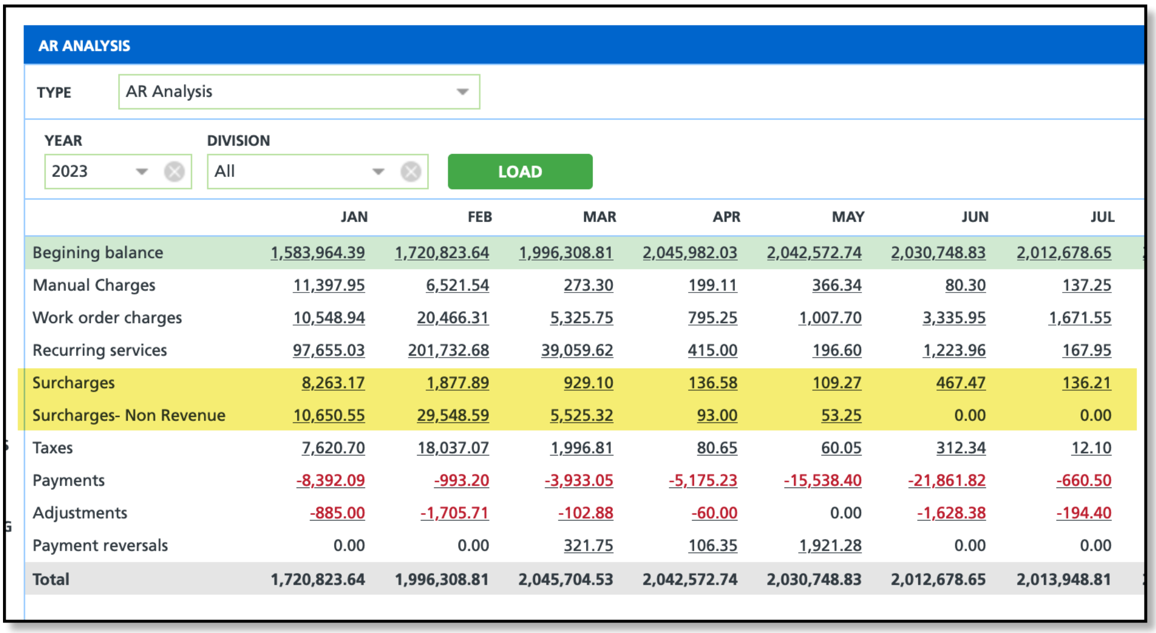
Search

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: 2023 | DIVISION: All | LOAD

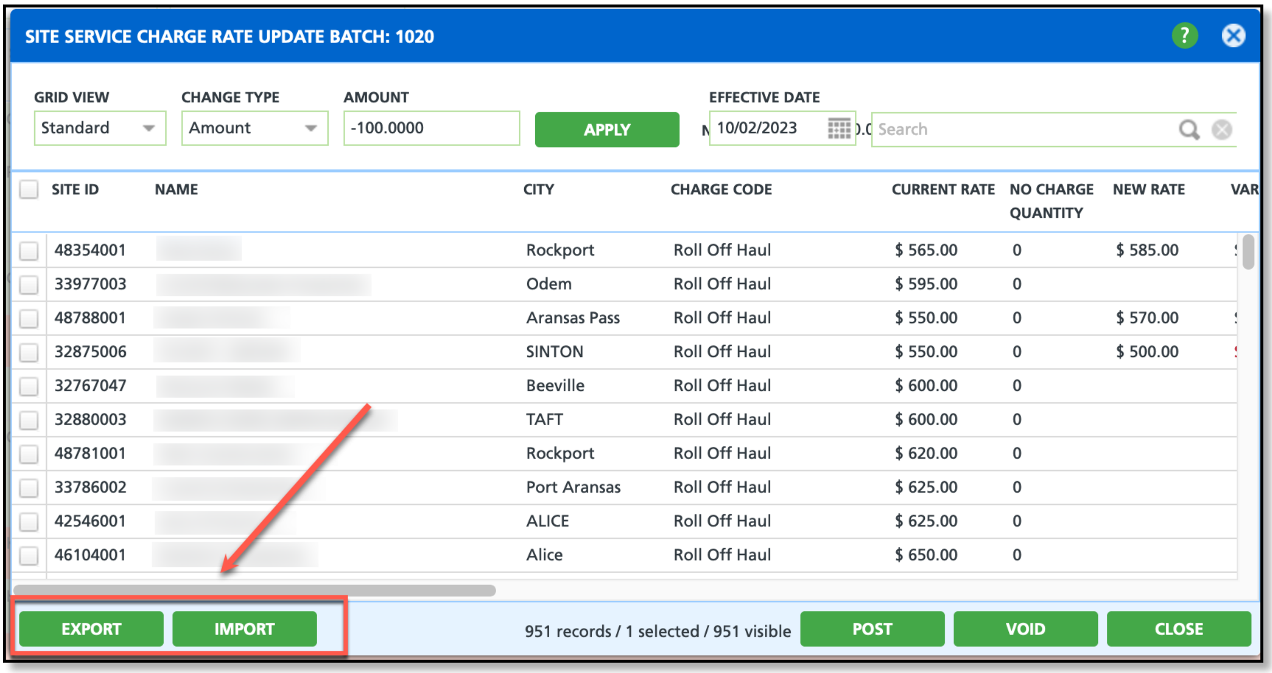
	JAN	FEB	MAR	APR	MAY	JUN	JUL
Begining balance	1,583,964.39	1,720,823.64	1,996,308.81	2,045,982.03	2,042,572.74	2,030,748.83	2,012,678.65
Manual Charges	11,397.95	6,521.54	273.30	199.11	366.34	80.30	137.25
Work order charges	10,548.94	20,466.31	5,325.75	795.25	1,007.70	3,335.95	1,671.55
Recurring services	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]

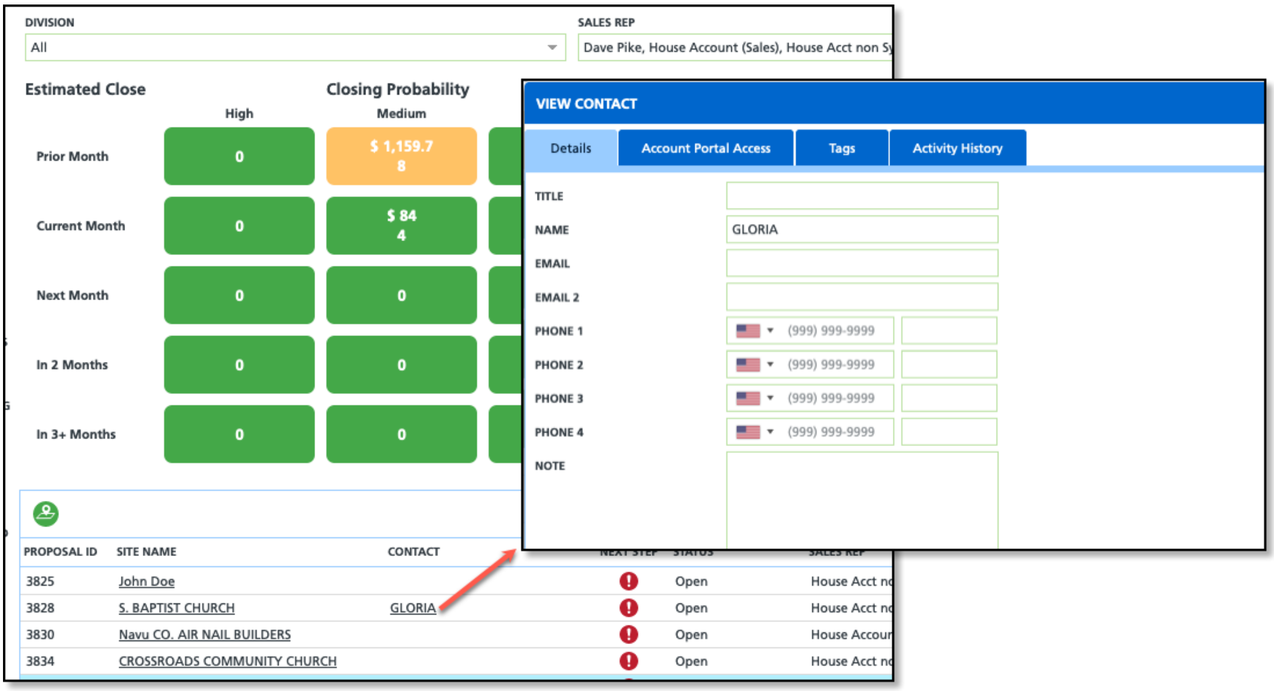
The Excel Export file has been improved by adding an ID column to address the issue that users encountered when attempting to use the same file format for importing a rate update batch. It's important to note that an error will consistently occur during the import process if the file lacks an ID column.



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 screen displays with the contact's information.

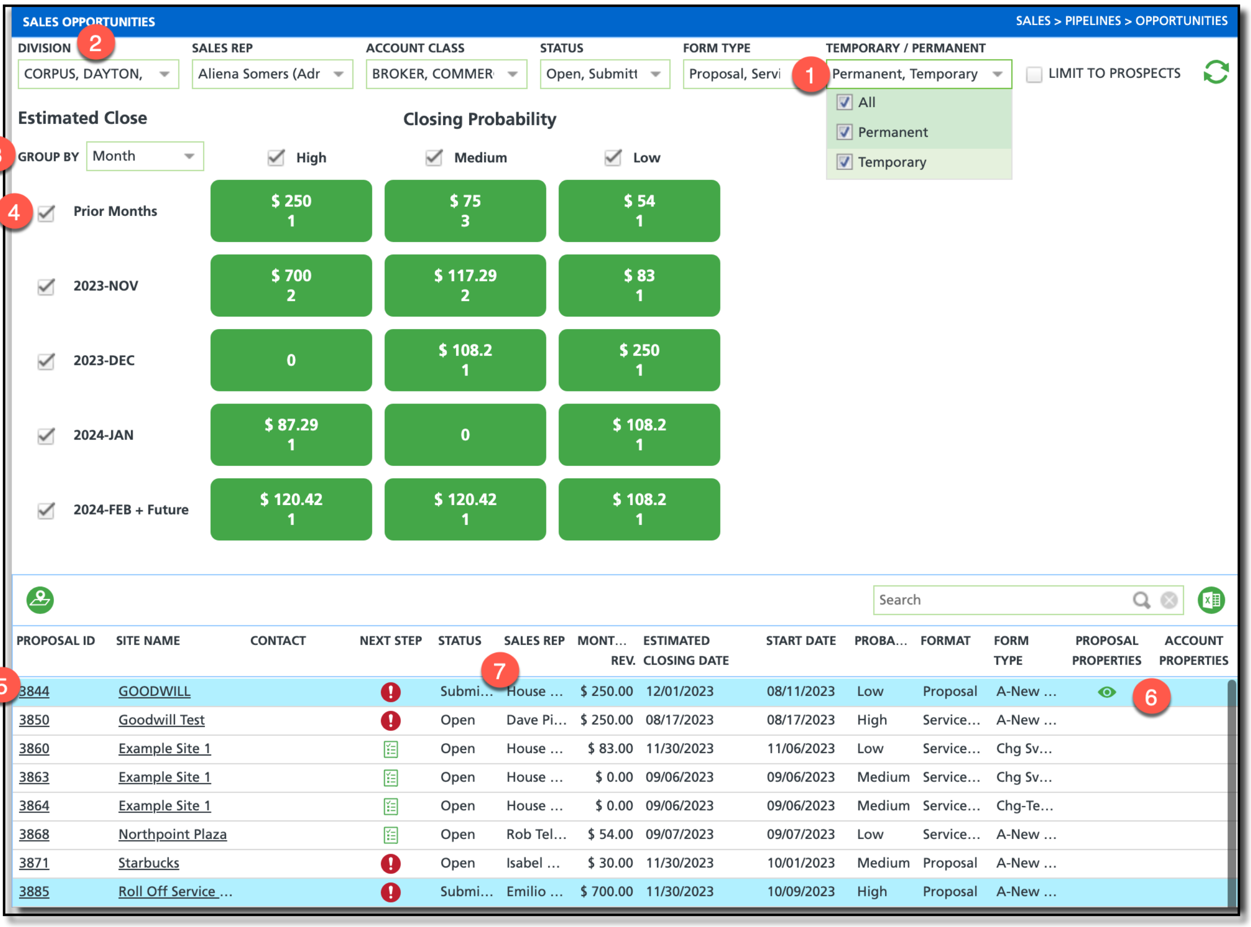


Pathway: *Sales > Pipelines > Opportunities > Make a selection from the upper grid*

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:
    - Sales Rep
    - Estimated Closing Date
    - Start Date
    - Probability
    - Double click within the row of a proposal to open the Edit Proposal window.



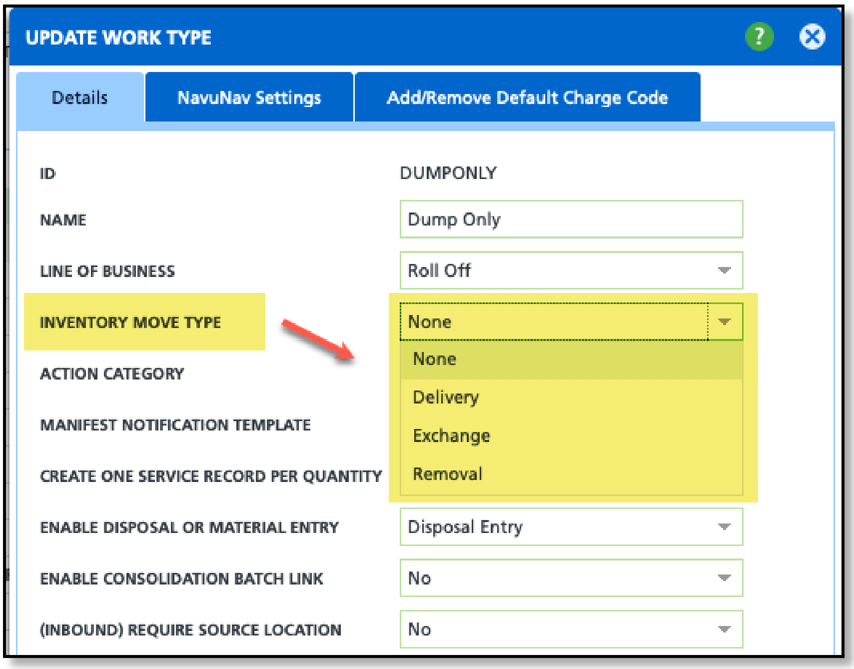
Pathway: *Sales > Pipelines > Opportunities*

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:

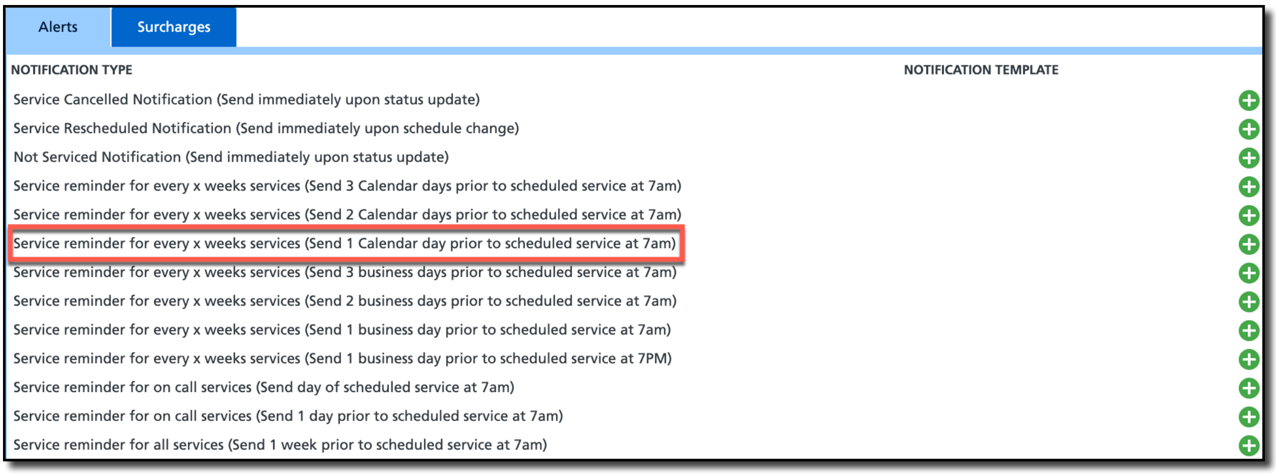
- None
- Delivery
- Exchange
- Removal



Pathway: *Setup > Operations > Work Type*

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

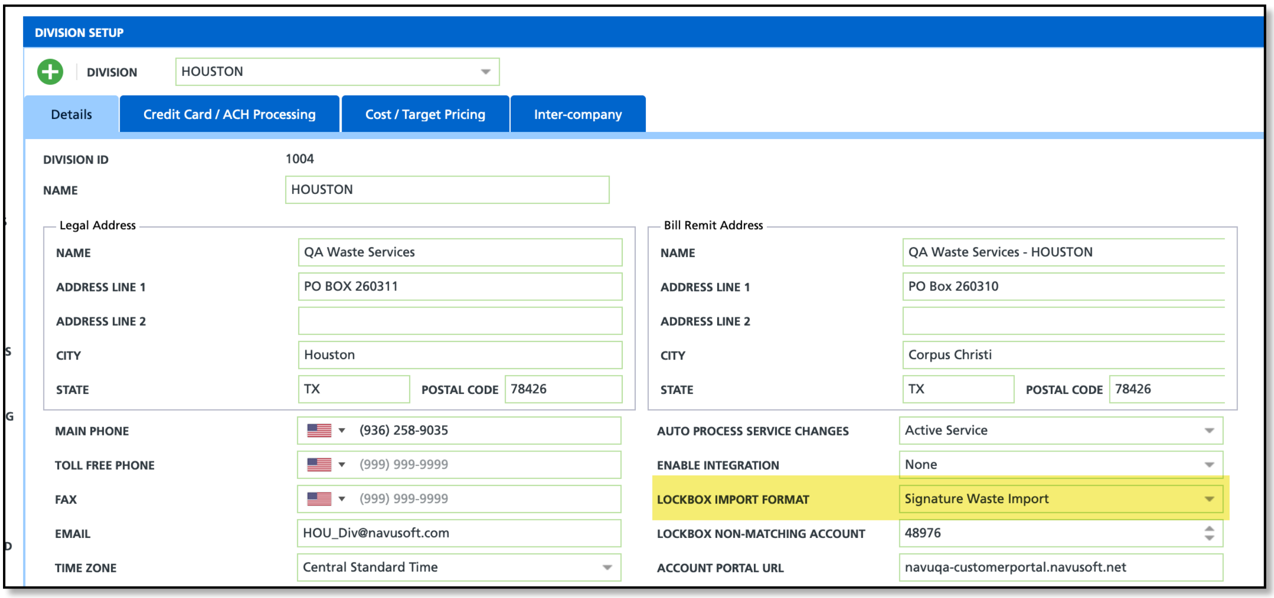
Within the Work Type setup screen, a new alert option, "*Service Reminder For Every x Weeks Services (Send 1 Calendar Day Prior To Scheduled Service At 7 AM),*" has been added to the Notification Types in the Alerts tab.



Pathway: *Setup > Operations > Work Type*
Article: Work Type

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

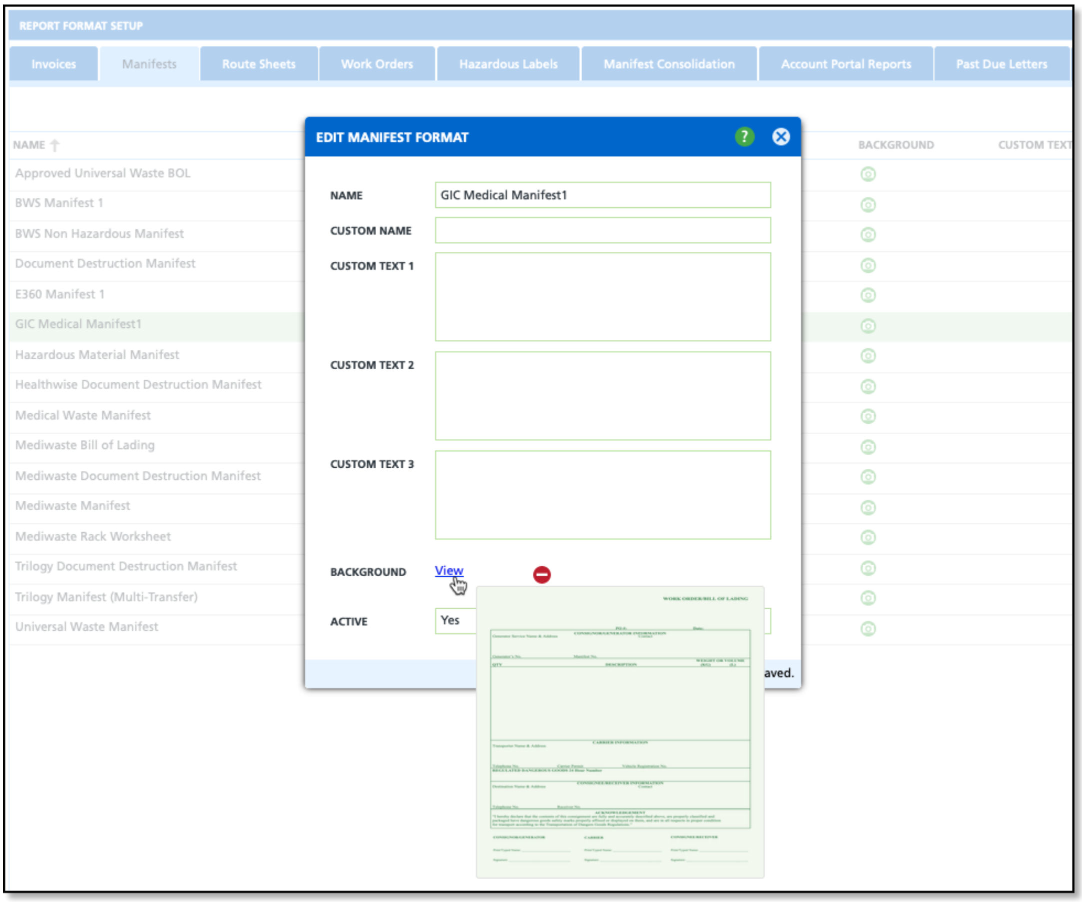
A new "Signature Waste Import" format has been added as an option in the "Lockbox Import Format" dropdown menu.



Pathway: *Setup > System > Division*

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

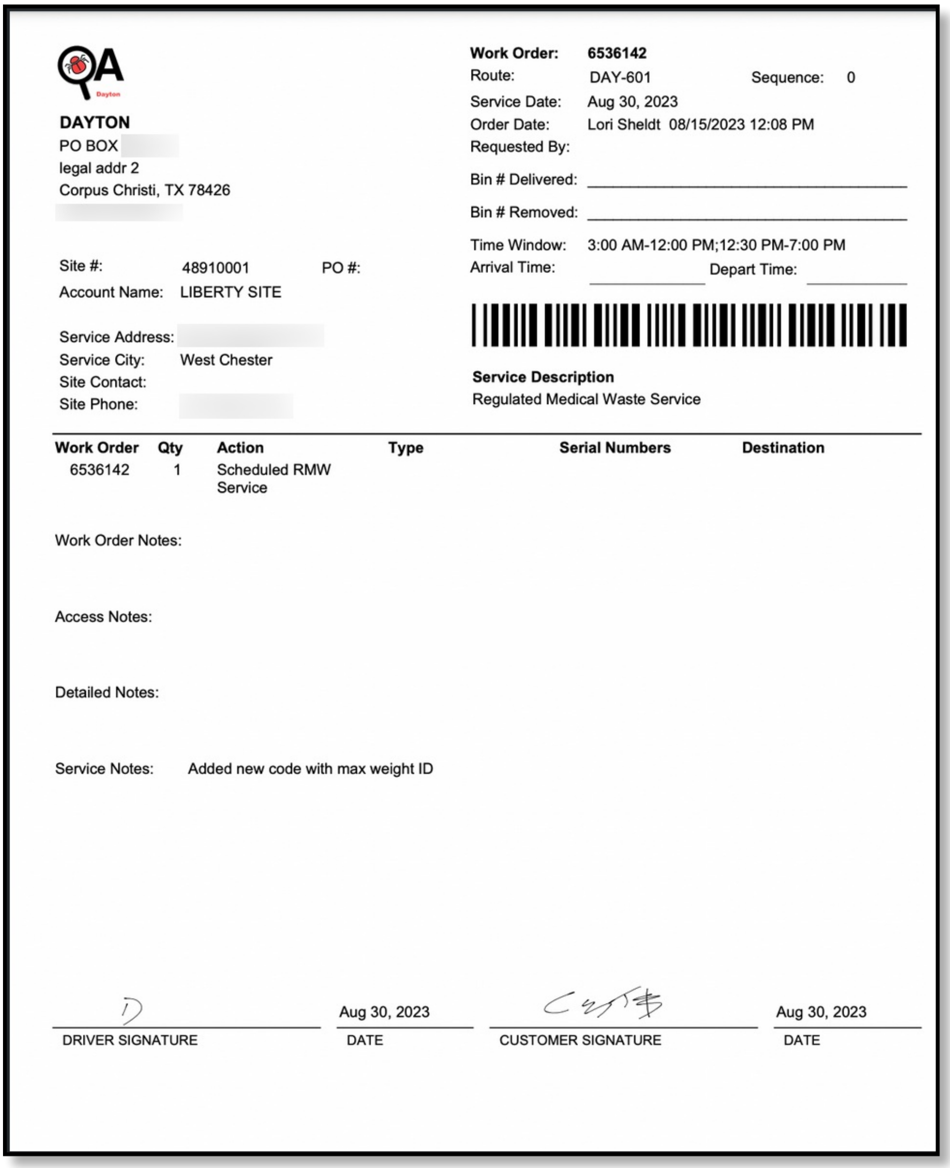
The logic has been modified to 'View' with regard to which file types appear upon hovering. When a user hovers their mouse over 'View,' only a preview for image file types will be shown.



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).



DAYTON
PO BOX
legal addr 2
Corpus Christi, TX 78426

Work Order: **6536142**
Route: DAY-601 Sequence: 0
Service Date: Aug 30, 2023
Order Date: Lori Sheldt 08/15/2023 12:08 PM
Requested By:
Bin # Delivered: ____________
Bin # Removed: ____________

Site #: 48910001 PO #:
Account Name: LIBERTY SITE

Time Window: 3:00 AM-12:00 PM;12:30 PM-7:00 PM
Arrival Time: ________ Depart Time: ________

Service Address:
Service City: West Chester
Site Contact:
Site Phone:

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

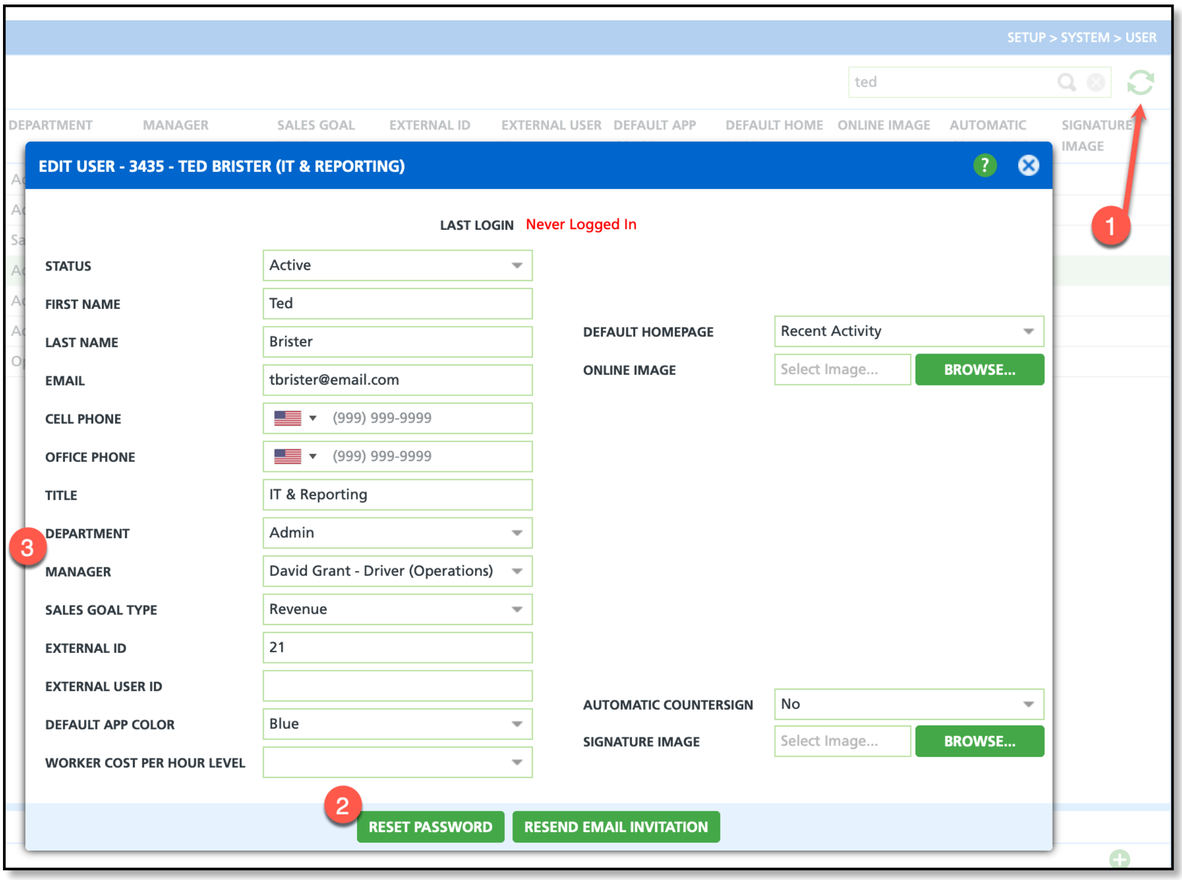
DRIVER SIGNATURE	DATE	CUSTOMER SIGNATURE	DATE
	Aug 30, 2023		Aug 30, 2023

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:

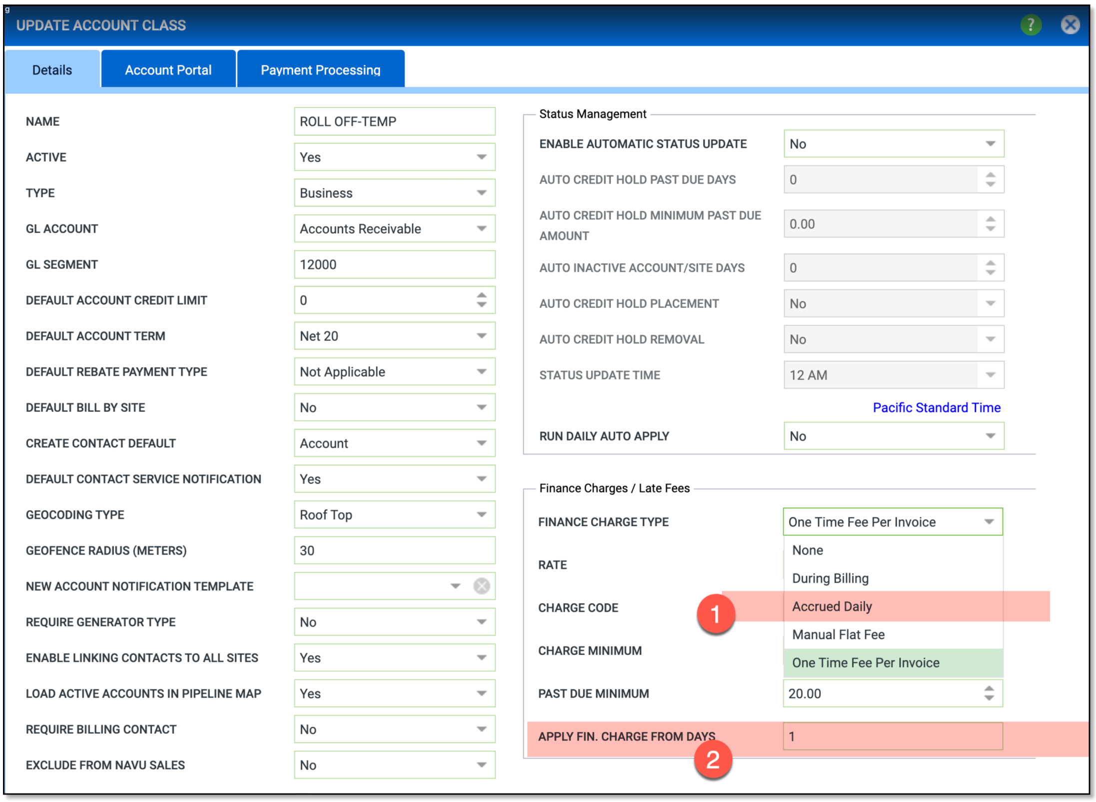
1. A refresh page option added.
2. Reset Password has been moved to the bottom of the Edit User tool.
3. Manager ID has been changed to Manager.



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.

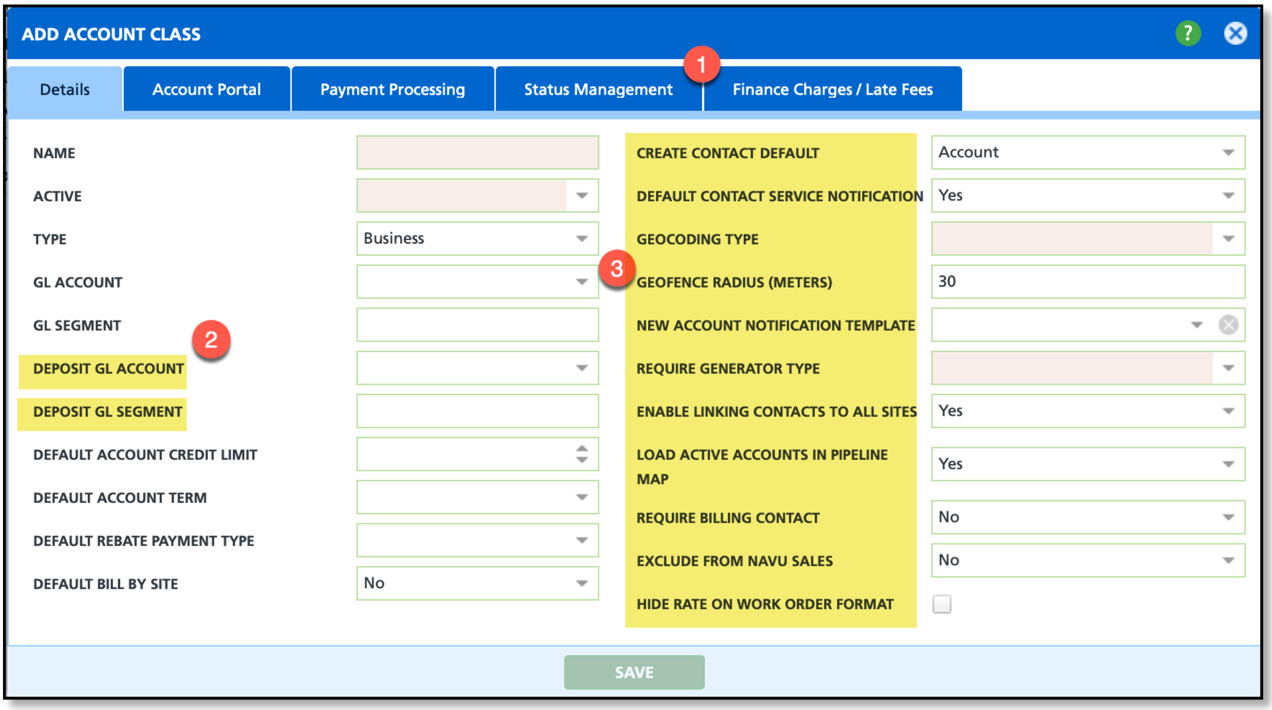


Pathway: *Setup > Account > Account Class*

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

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

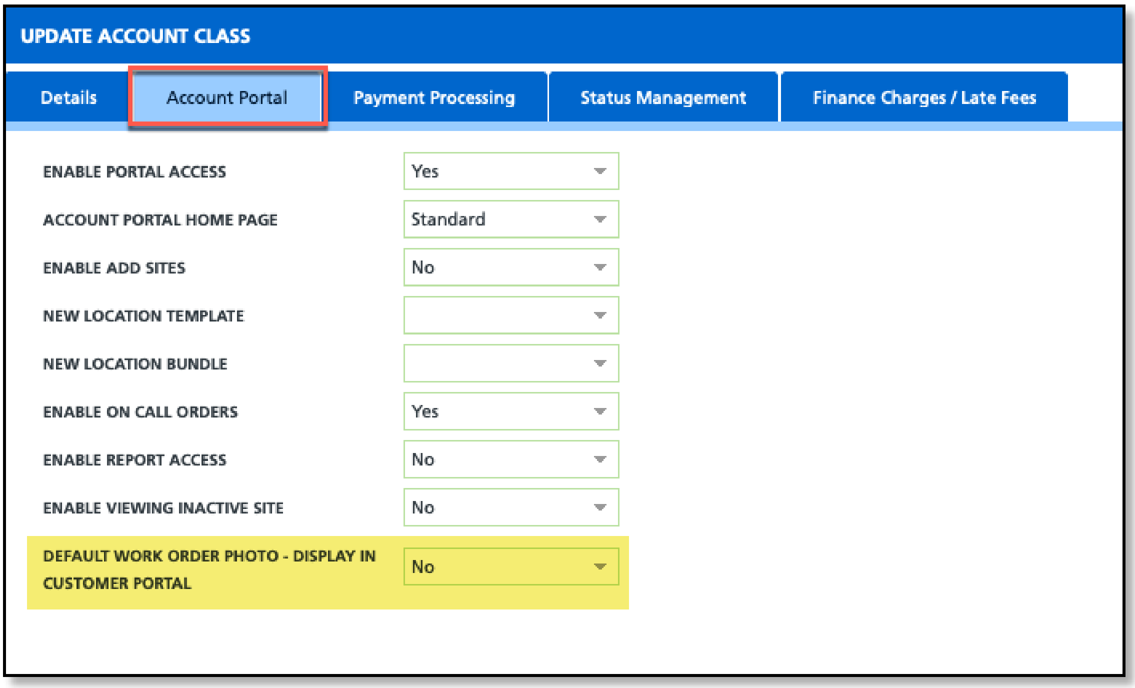
1. The 'Status Management' and 'Finance Charge / Late Fees' sections have been relocated to their own tabs.
2. Two new fields "Deposit GL Account" and "Deposit GL Segment" have been added.
3. Fields "Create Contact Default" through "Hide Rate On Work Order Format" have been relocated from the left column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



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.



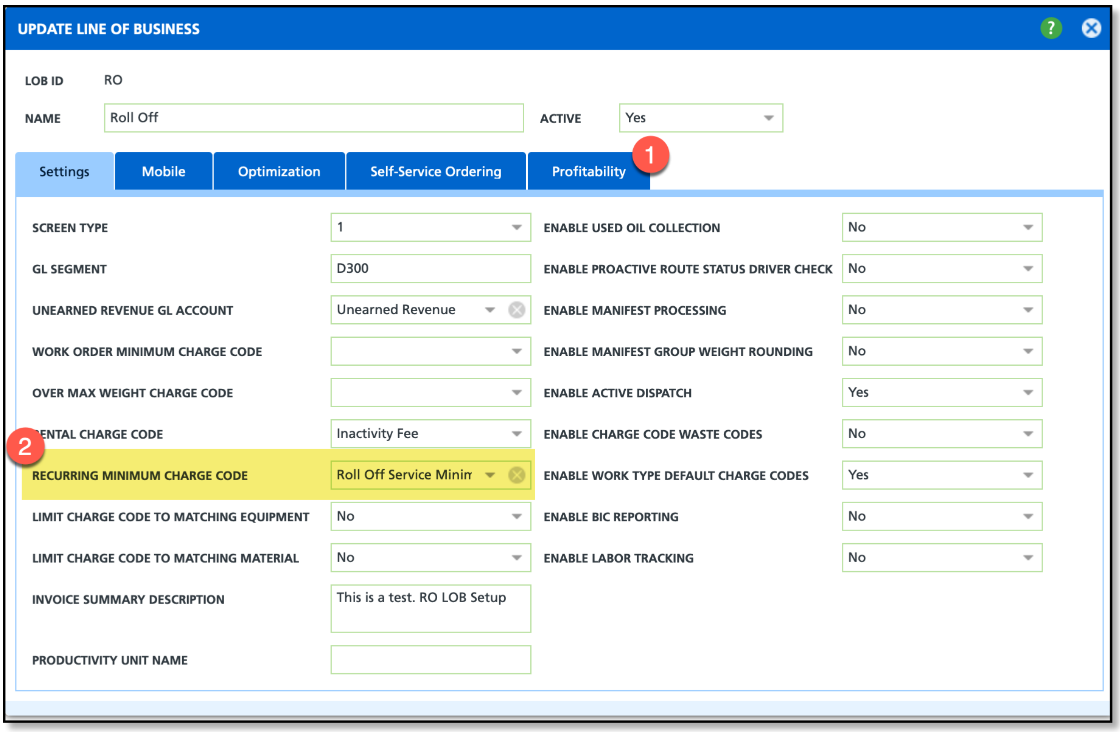
Pathway: *Setup > Account > Account Class*

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

Line of Business

Pathway: *Setup > Services > Line of Business*

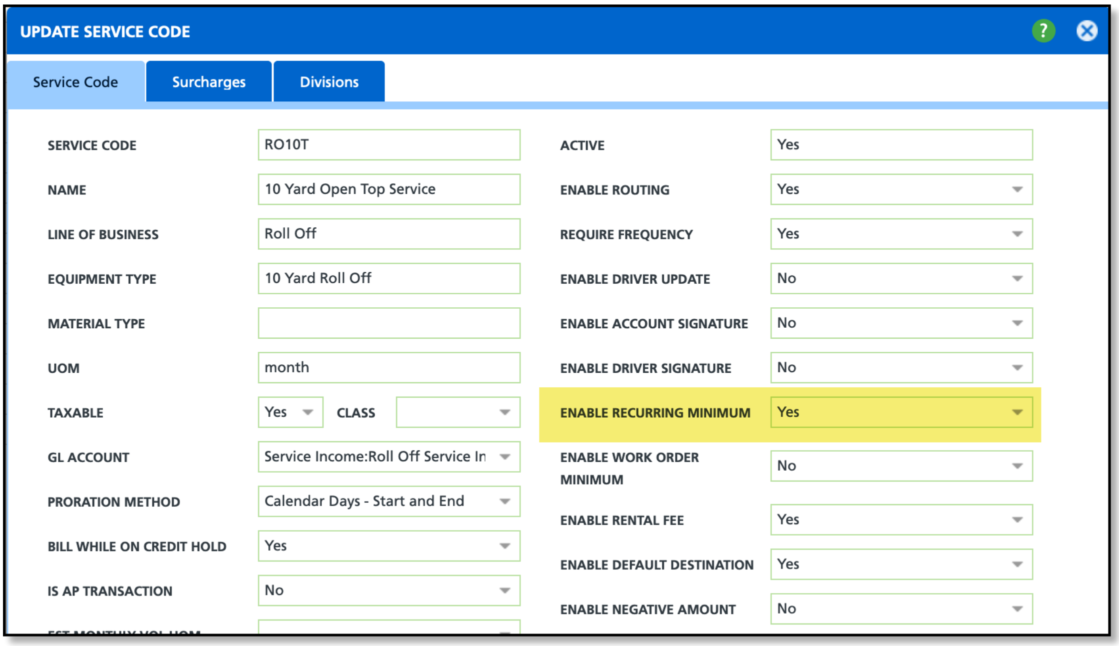
1. The Profitability section has been relocated to its own tab.
2. A new field "Recurring Minimum Charge Code" has been added and is limited to charge codes of the same Line of Business.



Service Code

Pathway: *Setup > Services > Service Code*

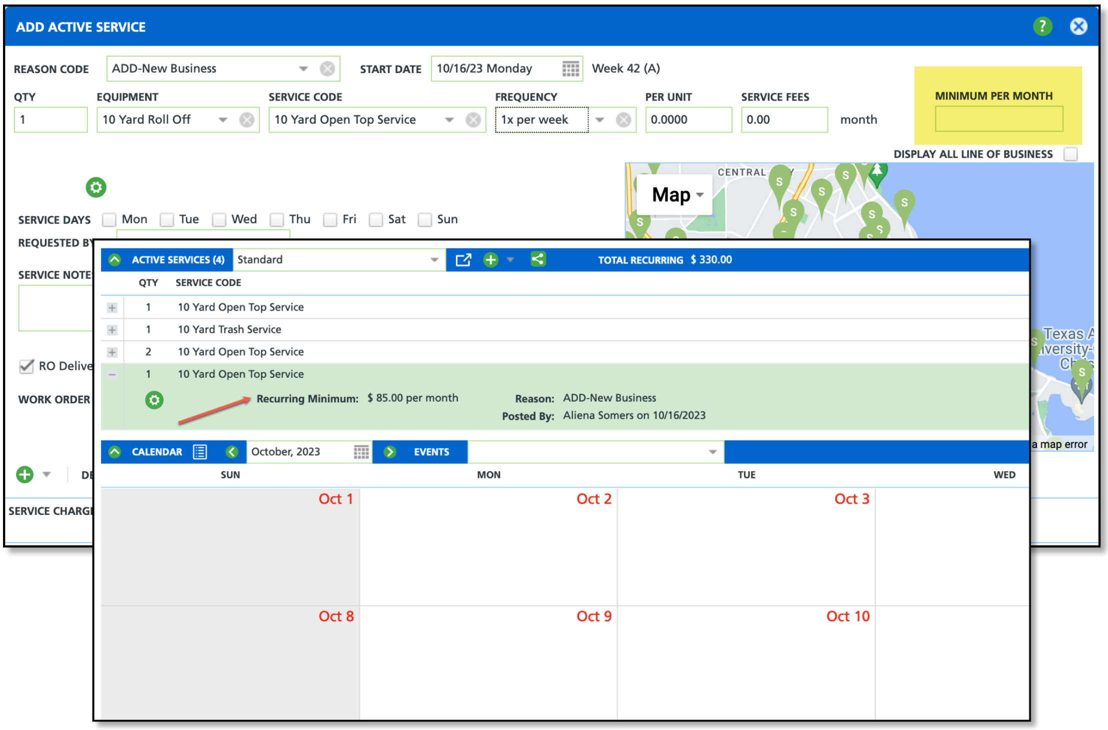
- A new field "Enable Recurring Minimum" has been added to the Service Code tab and will only display if the Recurring Minimum Charge Code field in the line of business is populated.



Add/Edit Active Service

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

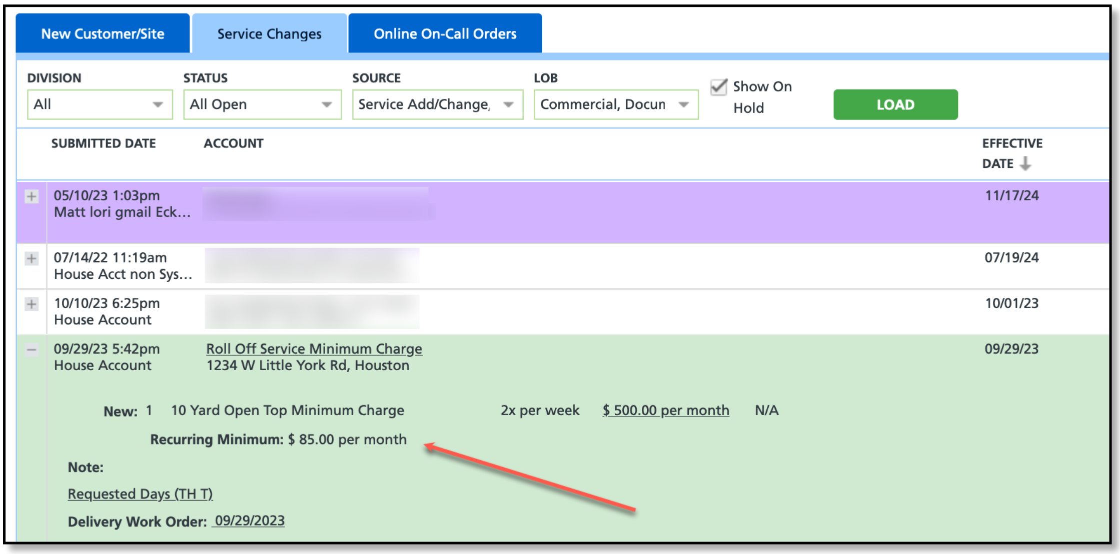
- If the selected Service Code has the "Enable Recurring Minimum" option enabled, a "Minimum Per Month" field will appear on the Add/Edit Active Service screen.
- When a Minimum Per Month is applied to an active service, it will be visible when expanding the service code.



Order Processing

Pathway: *Accounts > Order Processing*

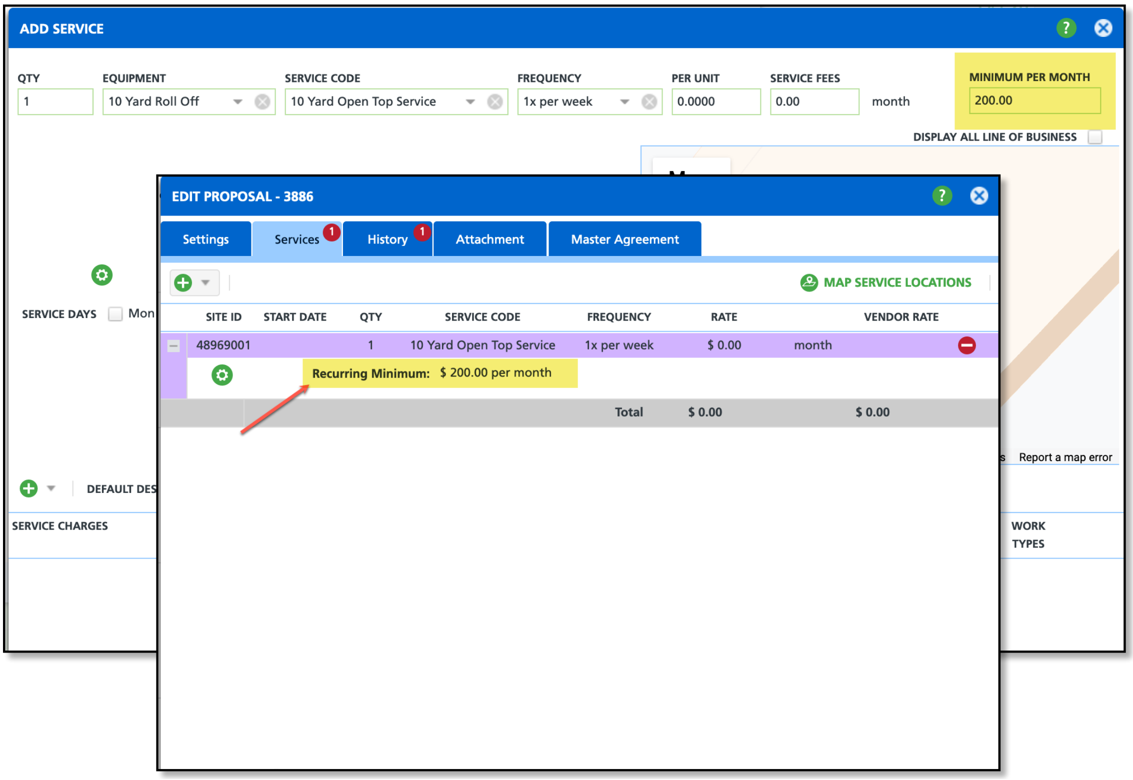
- When a Recurring Minimum is applied to an active service, it will be visible when expanding the service changes for the account in Order Processing.



Proposals/Contracts

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

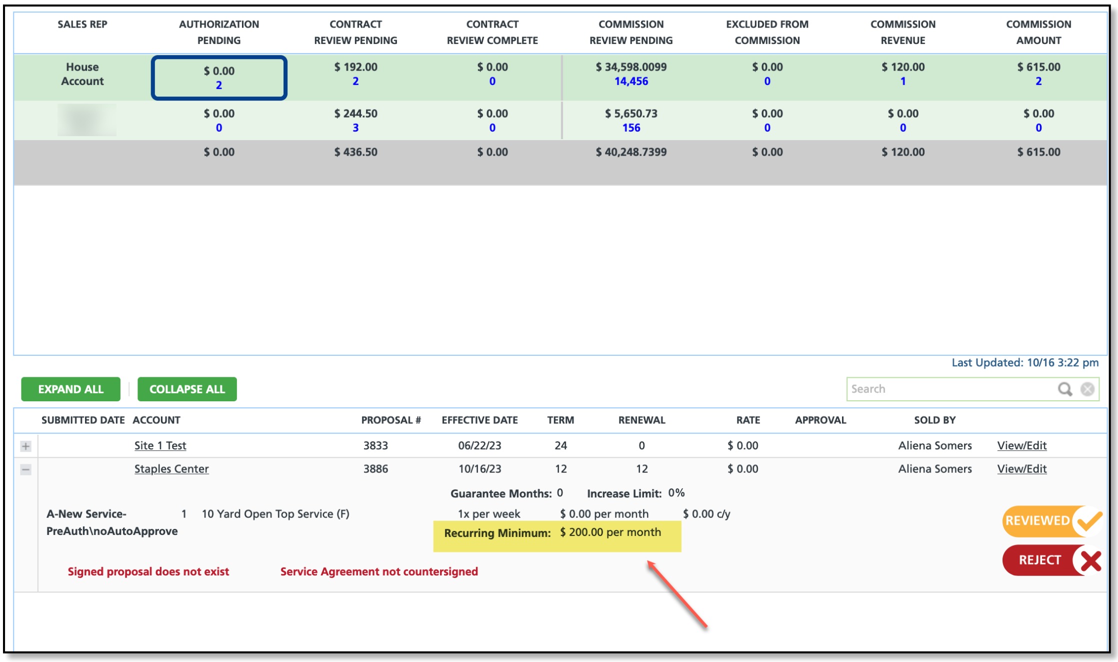
- If the selected Service Code has the "Enable Recurring Minimum" option enabled, a "Minimum Per Month" field will appear on the Add/Edit Service screen for the proposal/contract.
- When a Minimum Per Month is added, it will be visible upon expanding the service code for the proposal/contract.



Sales Management

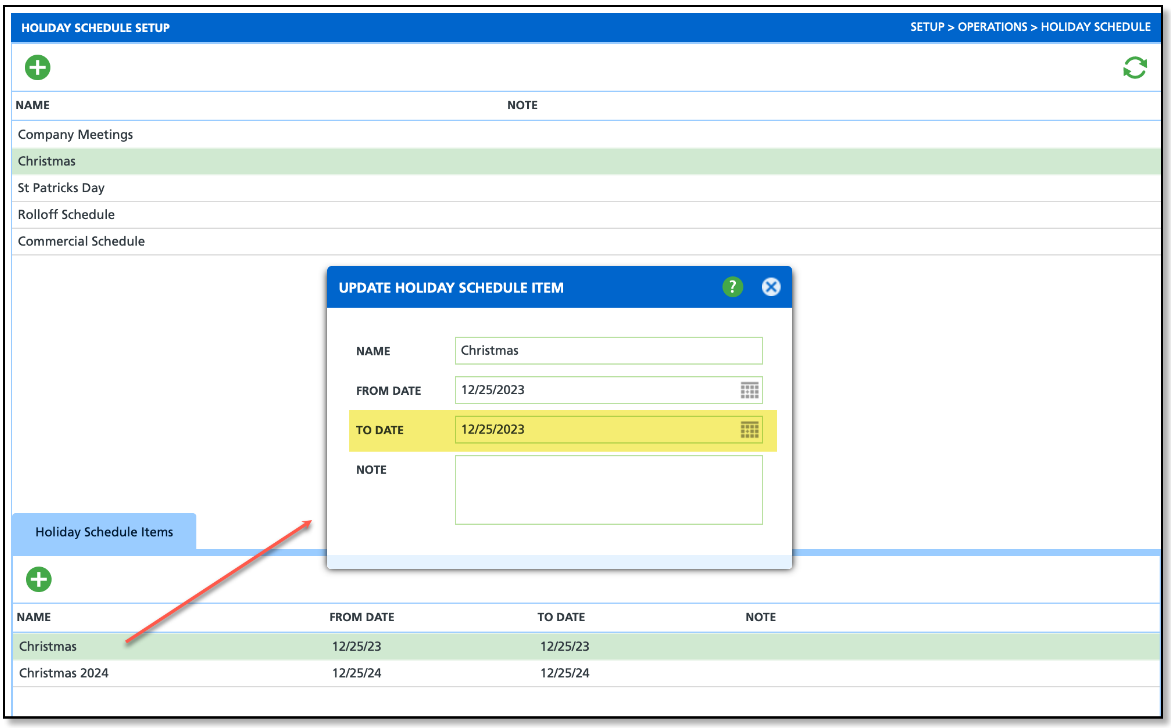
Pathway: *Sales > Sales Management*

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



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.

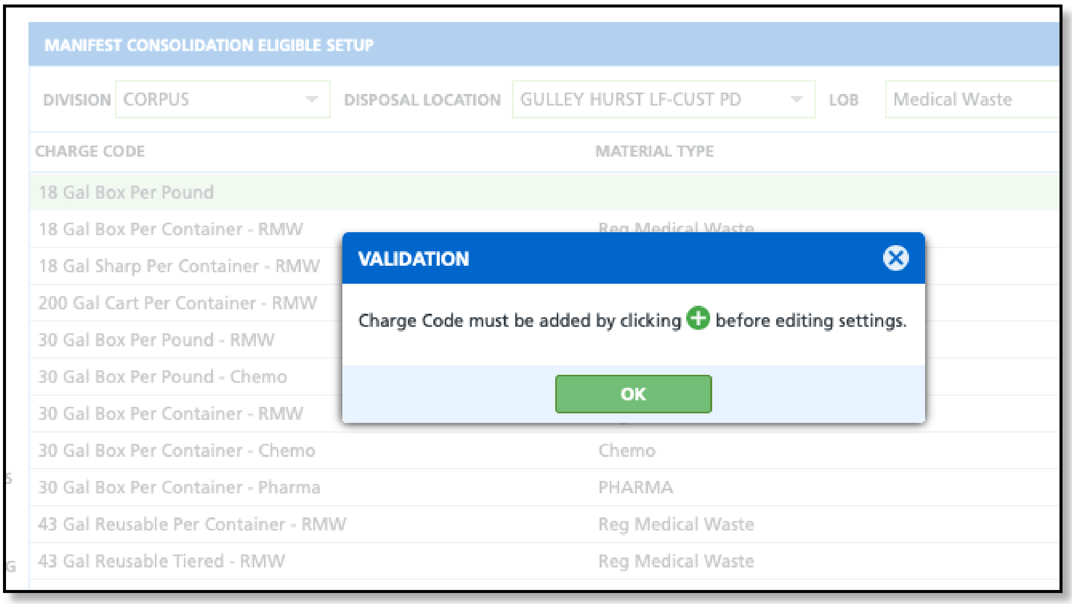


Pathway: *Setup > Operations > Holiday Schedule*

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.

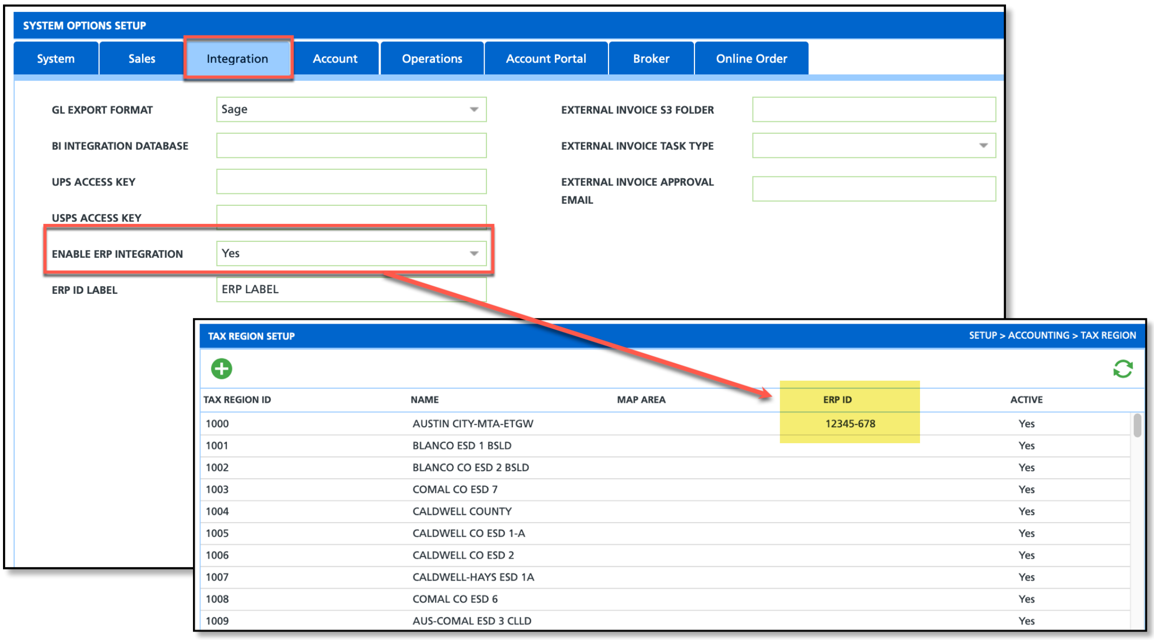
- **Previous**: First add selected Charge Code by clicking Plus (+) sign.
- **New:** Charge Code must be added by clicking (+) before editing settings.



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.

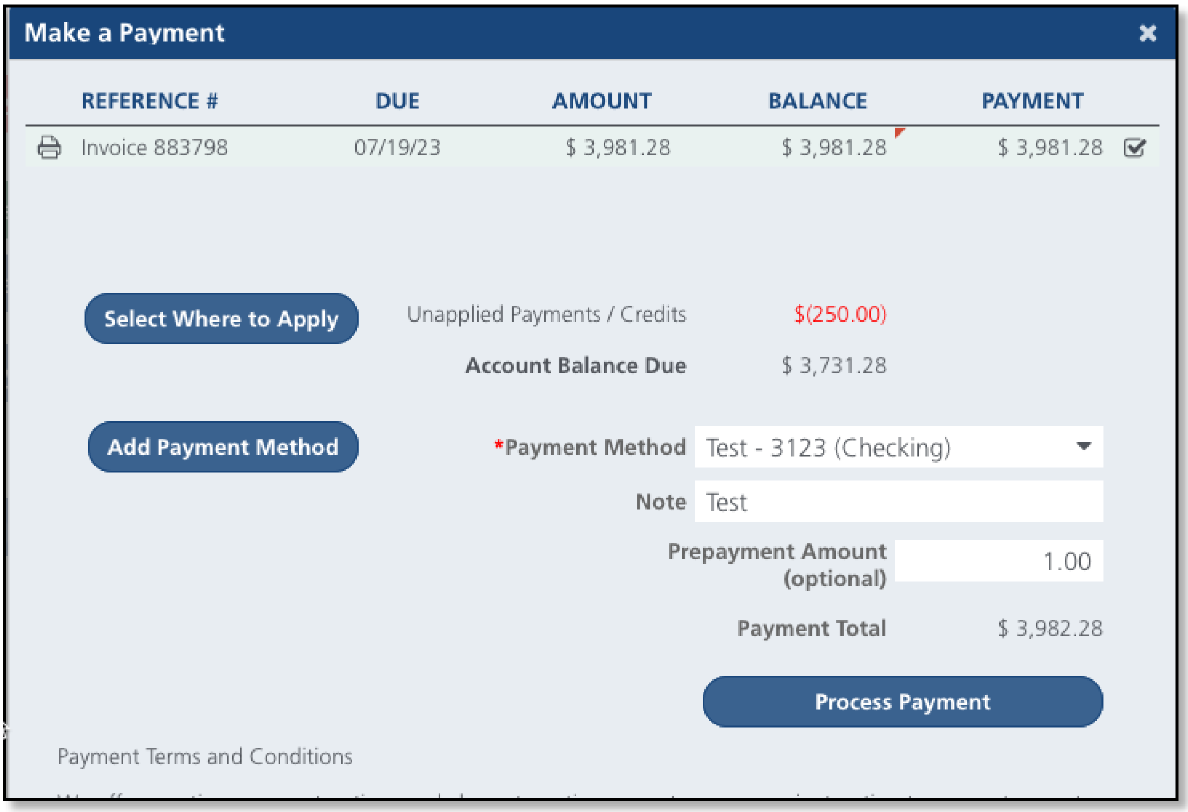


Pathway: *Setup > System > System Options; Setup > Accounting > Tax Region*

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.

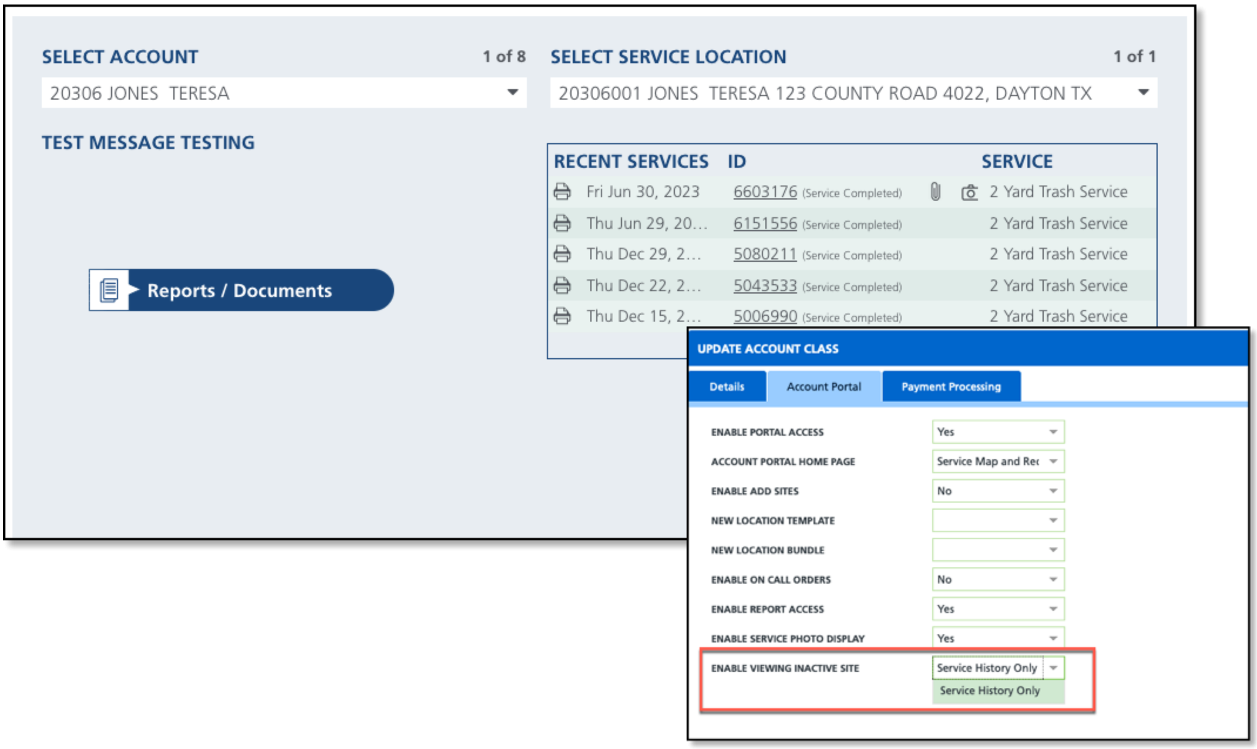


Pathway: *Portal > Make a Payment*

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.

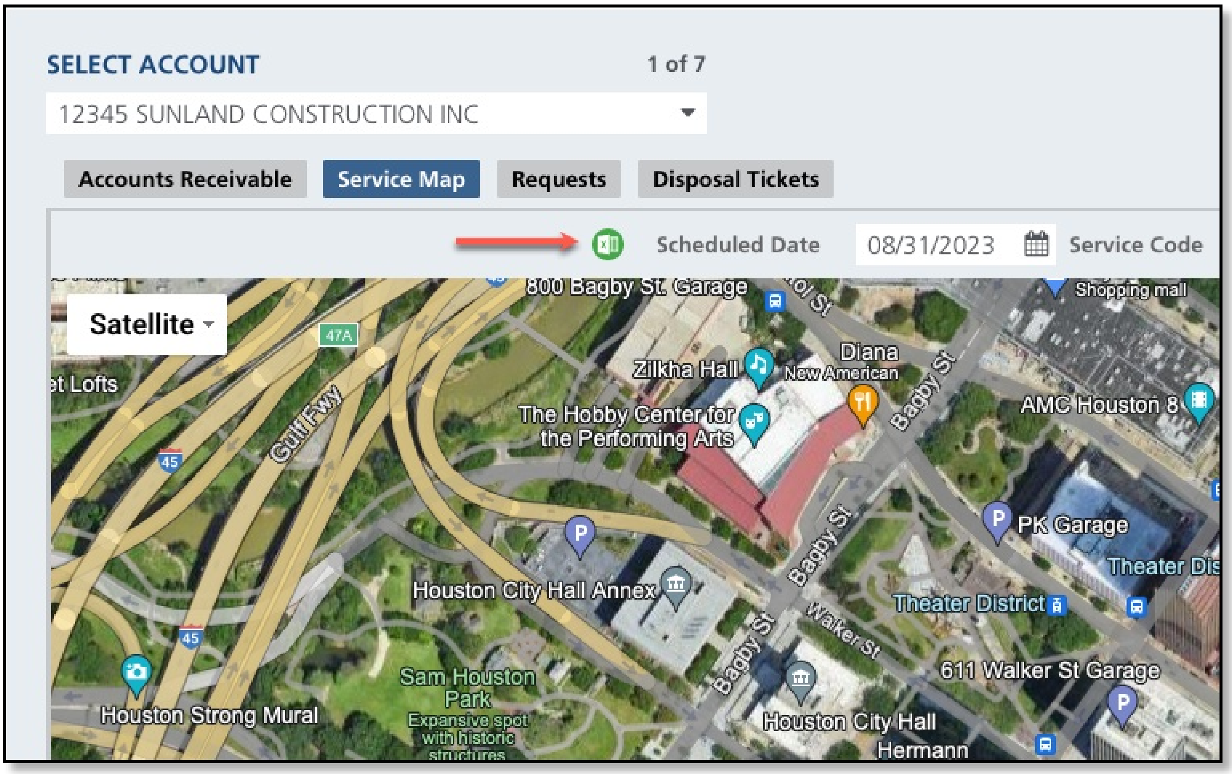
Access to inactive sites is determined by the account class to which the site belongs. When the 'Enable Viewing Inactive Site' field in the Account Portal tab is set to "Service History Only," portal users will have restricted access upon logging in.



Pathway: *Portal; Setup > Account > Account Class*
Articles: *Account Class Setup*

Customer Portal - Inventory Added to Service Map Export (15578)[Enhancement]

The export feature within the Customer Portal's Service Map has been improved to include site inventory for equipment that corresponds to the items listed on a service record.



Pathway: *Customer Portal > Service Map > Export Icon*