

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.

NAVU REQUESTS

USER

(2)

PRODUCT

All

MODULE

All

SCREEN

All

Recent Activity

Submission Pending

Our Response Pending

With Support Team

With Development Team4

Installation Pending

History

CREATED WITHIN

Search

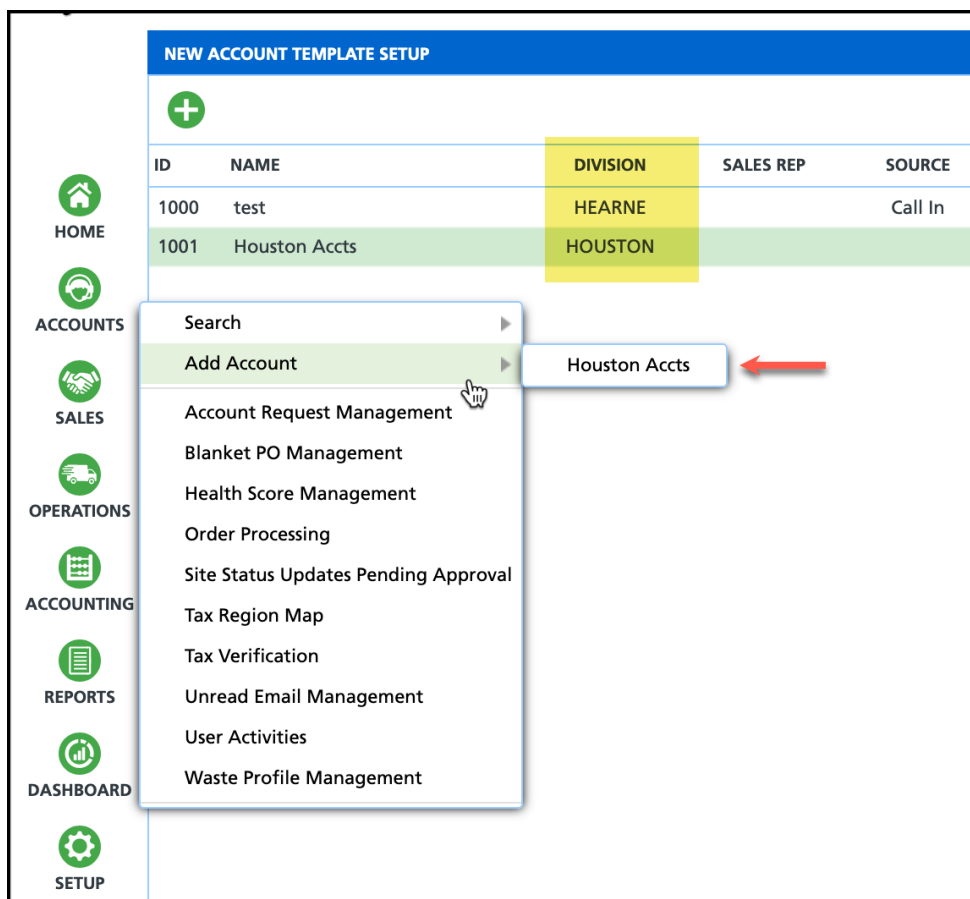
REQUEST ID		CREATED DATE	TYPE	USER	MODULE	SCREEN	SUMMARY
15372	M	06, 23	Documentation	<div></div>	Operations		Material Type
15373	M	14, 23	Documentation	<div></div>	Setup		Material Type
15626	M	06, 23	Documentation	<div></div>	Setup		Charge Code
18541		Aug 16, 23 8:27am	Aug 18, 23	Documentation	Sales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

Pathway: Navu Requests

Accounts

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

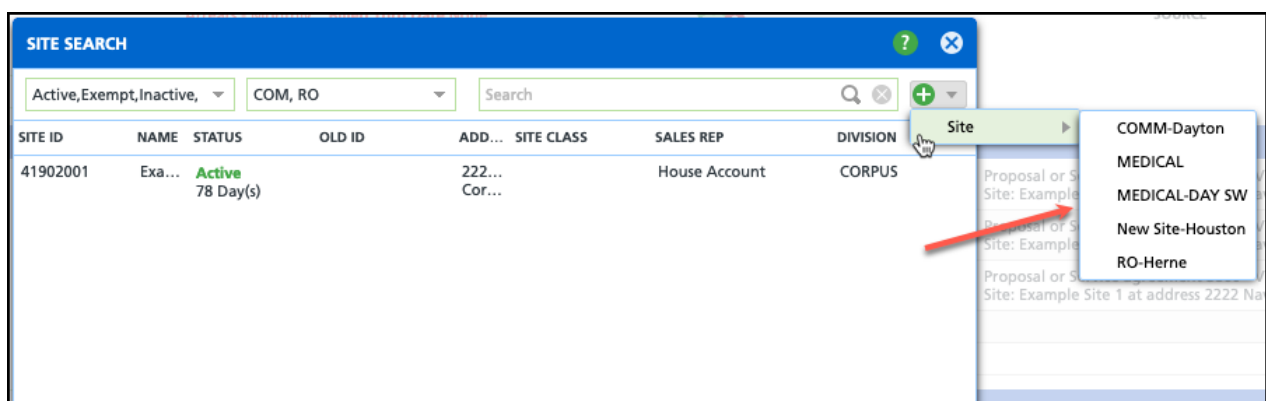
Logic has been updated to the Add Account Templates to restrict access based on the user's division access (assigned on their user account). If the template does not have a division assigned, it will continue to be visible to all users.



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.
-

The screenshot shows the 'ADD PROPOSAL' form with the following fields and sections:

- ACCOUNT:** 41902 / Example Account 1
- DOCUMENT FORMAT:** Proposal
- DOCUMENT TYPE:** [Dropdown]
- STATUS:** Open
- SOURCE:** [Dropdown]
- SALES REP:** House Account (House Accou)
- SOLD BY:** Aliena Somers (Adm)
- TITLE:** [Text Field]
- PO NUMBER:** [Text Field]
- EFFECTIVE DATE:** 08/25/2023
- DELIVERY DATE:** 08/25/2023
- ESTIMATED CLOSE:** 08/25/2023
- TERM:** [Dropdown]
- PRINT EST. SURCHARGE:** No
- PRINT EST. TAX:** No
- GROUP:** Site
- NOTE:** [Text Area]
- DELIVERY INSTRUCTION:** [Text Area]

The **ELECTRONIC SIGNATURE** modal is open, showing the following details:

- PLEASE SELECT SIGNATURE METHOD:** Sign (radio), Type (radio)
- NAME:** [Text Field]
- TITLE:** [Text Field]
- PAYMENT REQUIRED:** \$10.00
- TYPE:** [Dropdown]
- NAME:** [Text Field]
- MAKE A PAYMENT:** [Button]
- SUBMIT, CLEAR, CLOSE:** [Buttons]

The **PAYMENT REQUIRED AT CUSTOMER SIGNATURE** dropdown is highlighted with a red box, showing the following options:

- 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

QTY: 2

EQUIPMENT: 15 Yard Roll Off

SERVICE CODE: 15 Yard Open Top Service

RENT FREE DAYS:

DAILY RATE:

REQUESTED BY:

START DATE: 08/01/23 Tuesday

FREQUENCY: On Call

PER UNIT: 0.0000

SERVICE FEES: 0.00 month

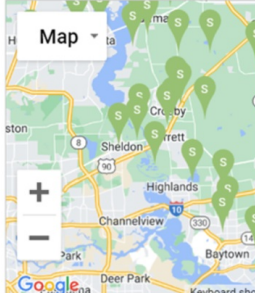
Week 31 (B)

<input checked="" type="checkbox"/> RO Removal	ROUTE: DAY 301	DATE: 04/01/21 Thursday
<input checked="" type="checkbox"/> RO Delivery	ROUTE: DAY 301	DATE: 08/01/23 Tuesday

WORK ORDER NOTES:

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

SITE ID	NAME	STATUS	OLD ID	ADD...	SITE CLASS	SALES REP	DIVISION
41902001	Exa...	Active		222...	Cor...	House Account	CORPUS

Site

- 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.

The screenshot displays the 'Customer Service Screen (Accounts)' for account 45170, Navu GLOBAL. The account address is PO BOX 1234, ATLANTA, GA 30357. The account status is 'Credit Hold'. The account manager is 'House Acct non System', and the class group is 'COMMERCIAL'. The bill group is 'HOU-COMMERCIAL ARREARS', and the billing cycle is 'Arrears - Monthly'. The billed thru date is 'Feb 01, 2023'. The account is significantly past due, as indicated by the 'HIGHLIGHTS' section. A warning message is displayed: 'WARNING: Site: Testing Warning Message'. The account balance is 0.00. The account is active, with 0 active services. The account is in the 'Standard' service code. The account is in the 'September, 2023' calendar. The account is in the 'EVENTS' section, showing 'AR, Service Records, Rental Fee, Service Chang'. The account is in the 'SUN' section, showing 'Aug 27'. The account is in the 'MON' section, showing 'Aug 28'. The account is in the 'TUE' section, showing 'Aug 29'. The account is in the 'WED' section, showing 'Aug 30'.

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.

The screenshot displays the 'EDIT ACCOUNT' screen for account 45170, Navu GLOBAL. The account is in the 'Settings' tab. The 'Billing' section shows the 'BILL GROUP' as 'COR-COMM MON ARREARS'. The 'Arrears - Monthly' billing cycle is selected. The 'Billed Thru Date' is 'Sep 14, 2023', and the 'Next Invoice Date' is 'Sep 14, 2023'. The 'Batch' is '25685 (in progress)'. The 'INVOICE BY EMAIL' is set to 'No'. The 'TERM' is 'Due upon receipt'. The 'CREDIT LIMIT' is set to '1099'. The 'APPLY FINANCE CHARGES' option is highlighted in yellow. The 'EXCLUDE FROM PAYMENT PROCESSING FEE' option is unchecked. The 'EXCLUDE FROM PAST DUE NOTIFICATION' option is unchecked. The 'HIDE WORK ORDER FORMAT RATE' option is unchecked. The 'INBOUND ORDER AUTO PRINT' option is unchecked. A warning message is displayed: 'WARNING: Site: Testing Warning Message'. The account is in the 'SUN' section, showing 'Aug 27'. The account is in the 'MON' section, showing 'Aug 28'. The account is in the 'TUE' section, showing 'Aug 29'. The account is in the 'WED' section, showing 'Aug 30'.

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.'

The screenshot shows the 'ACTIVE SERVICES (3)' section with a table of services. A context menu is open over the 'Reverse' button, showing options: 'Edit', 'Reverse', 'Create On Call Order', 'View Billing History', 'View Change History', 'View Routing History', and 'View Service History'. The service record details include: Rent: \$ 2.25 per day after 14 days, Reason: ADD-New Business, Posted By: Aliena Somers on 09/27/2023.

QTY	SERVICE CODE	SERVICE ID	FREQUENCY	SCHEDULE	RATE	START DATE	END DATE	CONTRACT E
1	10 Yard Open Top Service	4AD6	On Call		\$ 85.00 per month	08/21/23		06/07/28
1	10 Yard Trash Service	FD27	1x per week	M	\$ 75.00 per month	08/31/23		06/07/28
2	10 Yard Open Top Service	2BE6	On Call		\$ 170.00 per month	10/06/23		06/07/28

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.

The screenshot shows the 'ACTIVE SERVICES (3)' section with a table of services. The service record details include: Reason: ADD-New Business, Posted By: Aliena Somers on 09/28/2023. The pricing change history shows a change from \$ 100.00 per month to \$ 90.00 per month on 10/27/23, and then to \$ 75.00 per month on 09/05/23.

QTY	SERVICE CODE	SERVICE ID	FREQUENCY	SCHEDULE	RATE	START DATE	END DATE	CONTRACT EXP.	WO MIN.
1	3 Yard Trash Service	EB6E	2x per week	T,H	\$ 100.00 per month	09/01/23			
1	10 Yard Open Top Service	53ED	On Call		\$ 90.00 per month	10/27/23			
1	10 Yard Open Top Service	53ED	On Call		\$ 75.00 per month	09/05/23	10/26/23		

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 ServicesPO BOX [REDACTED]
Dayton OH 45134First-Class Mail
U.S. Postage Paid
Mailed From Zip Code 45134
Permit # 3

RETURN SERVICE REQUESTED

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****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.

TAX VERIFICATION

DIVISION

HOUSTON

SERVICE REGION

HOUSTON OPEN MARKET

Verified (11)

Not Verified (485)

Failed (2)

Address Not Found (0)

Errors (0)

VERIFY ALL

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							
SETUP > SYSTEM > REASON CODE							
	TYPE	Invoice Adjustment					
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)

Search

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)

Search

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' window with a summary table at the top and a list of transactions below. A context menu is open over the 'Invoice' transaction dated 09/06/22, with the 'Convert to Deposit' option highlighted by a red arrow. A 'CONFIRMATION' dialog box is also visible, asking 'Are you sure you want to convert this Payment to a Deposit?' with 'YES' and 'NO' buttons.

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

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 from QA Waste Services. It includes the company logo, address, and contact information. The invoice details for Wilson Medical are listed, including a table of work orders with dates, descriptions, and rates. A 'Make a Payment' link is visible on the left side of the invoice.

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

Wilson Medical
Site 48956001 - Wilson Medical - 6745 Gilmore Rd Hamilton, OH 45011

DATE	DESCRIPTION	WO #	PO #	QTY	RATE
06/27/23	Minimum Service Charge	6295336		1	
06/30/23	18 Gal Box Per Container - RMW	6295337		1	\$ 33.00
06/30/23	30 Gal Box Per Container - RMW	6295337		1	\$ 10.00
06/30/23	Minimum Service Charge	6295337		1	
07/01/23	18 Gal Box Per Container - RMW	6295344		1	\$ 33.00
07/01/23	30 Gal Box Per Container - Chemo	6295344		1	\$ 42.00
07/01/23	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

Account

Settings

Billing

BILL GROUP

Annual Billing

Advance - Annually

Billed Thru Date Dec 31, 2023

Next Invoice Date Jan 01, 2023

BATCH-25712 (in progress)

INVOICE BY EMAIL

No

INVOICE DETAIL LEVEL

Summary by Site Service

Detail

Summary by Line of business

Summary by Material

Summary by Site Service

TERM

CREDIT LIMIT

BILL BY SITE

☐

AUTO STATUS UPDATE

☒

APPLY FINANCE CHARGES

☒

EXCLUDE FROM PAYMENT PROCESSING FEE

☐

EXCLUDE FROM PAST DUE NOTIFICATION

☐

HIDE WORK ORDER FORMAT RATE

☐

INBOUND ORDER AUTO PRINT

☐

AP

DEFAULT PAYMENT METHOD

Not Applicable

PAYEE NAME

1099

☐

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

Jun 2022

REASON CODE

All

SUBMITTED BY

All

APPROVED BY

All

STATUS

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

1

2

3

PERIODREASON CODESUBMITTED BYAPPROVED/REJECTED BYSTATUSLOADSearch

JanJul<>

FebAug20192024

MarSep20202025

AprOct20212026

MayNov20222027

JunDec20232028

OKCANCEL

SITESITENAMEINVOICEAMOUNTREASON CODEDATESUBMITTED BYAPPROVED 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.

ADJUSTMENT HISTORY AND PENDING APPROVAL

DIVISION

All

Pending Approval

History

DIVISION	ACCOUNT	ACCOUNT NAME	INVOICE	AMOUNT	REASON CODE	DATE	USER		
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

11/15/22

AMOUNT

\$ 1,232.88

CREATED BY

Paul Gonzalez

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	
11/15/22	433080...	G5 PEARLAND PROP...			Surcharge	\$ 134.18	\$(50.00)	\$ 0.00	\$ 0.00	
11/15/22	433080...	G5 PEARLAND PROP...			Surcharge	\$ 14.38	\$ 0.00	\$ 0.00	\$ 0.00	
11/15/22	433080...	G5 PEARLAND PROP...			Tax	\$ 2.01	\$ 0.00	\$ 0.00	\$ 0.00	
11/15/22	433080...	G5 PEARLAND PROP...			Tax	\$ 0.90	\$ 0.00	\$ 0.00	\$ 0.00	
11/15/22	433080...	G5 PEARLAND PROP...			Tax	\$ 0.48	\$ 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

+

Jun 2022

Jul

Aug

Sep

Oct

Nov

Dec

2022

2023

2024

2025

2026

2027

OK

CANCEL

DIVISION

All

BANK ACCOUNT

All

(Partially Closed)

Open 0

\$ 0.00

Voided 2

\$ 0.00

Posted 352

\$ 3,318,041.33

Search

Q

⌕

BATCH #	PERIOD	DIVISION	IS MERCHANT	STATUS	DATE	BANK ACCOUNT	BANK CLEARED DATE	COUNT	TOTAL	CREATED ON	GL BATCH
7717	Jan	Jul	2018	2023	ent	Posted	06/01/2022	COMERICA - FWS	1	\$ 900.00	05/31/2022 4:24 pm
7719	Feb	Aug	2019	2024	ent	Posted	06/01/2022	COMERICA - FWS	182	\$ 15,670.50	05/31/2022 11:49 pm
7720	Mar	Sep	2020	2025	ent	Posted	06/01/2022	COMERICA - FWS	41	\$ 6,629.73	06/01/2022 7:31 am
7721	Apr	Oct	2021	2026	ent	Posted	06/01/2022	COMERICA - FWS	4	\$ 30,115.59	06/01/2022 7:31 am
7722	May	Nov	2022	2027	ent	Posted	06/01/2022	COMERICA - FWS	1	\$ 244.27	06/01/2022 7:56 am
7724	Jun	Dec	2023	2028	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.

BANK ACCOUNT SETUP

SETUP > ACCOUNTING > BANK ACCOUNT

ID	BANK NAME	DESCRIPTION	GL ACCOUNT	ACTIVE
1004	COMERICA - FWS	Corpus/Dayton	Comerica Frontier Bank A...	Yes
1005	TBD			No
1006	BANK OF NAVU		BBVA Bank Account -STX	Yes

Divisions

DIVISION NAME

QAWASTE

CORPUS

DAYTON

HOUSTON

HILLSBORO

HEARNE

AR PAYMENT BATCH

PERIOD

Oct 2023

DIVISION

All

BANK ACCOUNT

All

BATCH #

DIVISION

CREATE PAYMENT BATCH

DIVISION

CORPUS

DATE

10/06/2023

PERIOD

Oct 2023

BANK ACCOUNT

Select Bank Account

NOTE

COMERICA - FWS

SAVE

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

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

Tab: Billing Auto Pay

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

Scheduled Auto Pay		Billing Auto Pay								
DIVISION	All	<input type="checkbox"/> Limit to Expired <input type="checkbox"/> Limit to Last Payment Declined		<div> <div>Search</div> <div>Auto Refresh</div> </div>						
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

	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				IMPORT INVENTORY		Search	
Roll Off							
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.

SITE INVENTORY

Equipment Trucks

+

EQUIPMENT

LAST UPDATED

ADD SITE INVENTORY

EQUIPMENT TYPE

10 Yard FL (Ser)

SERIAL NUMBER

NOTE

SAVE

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

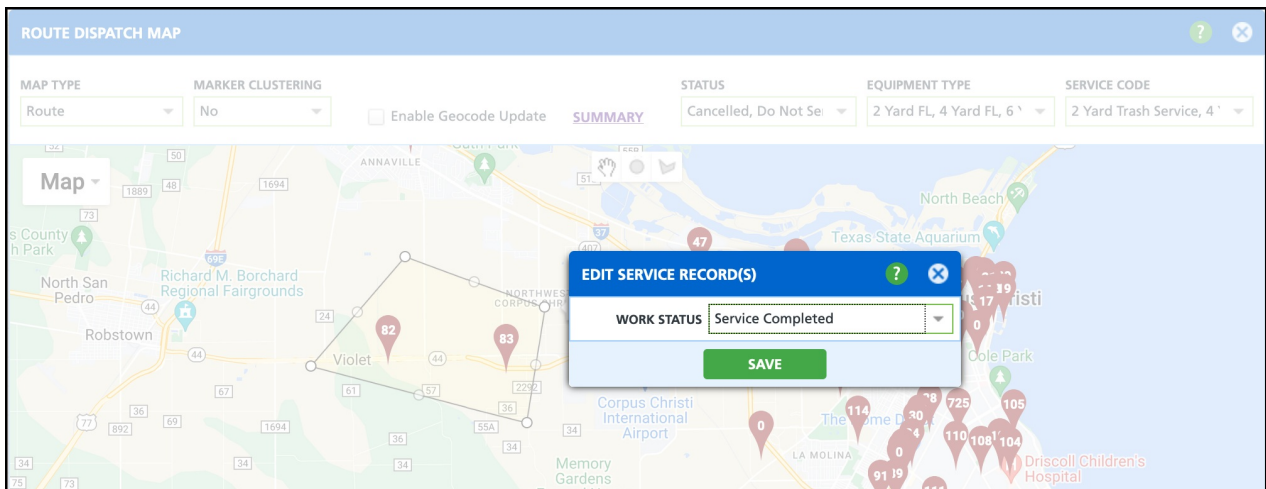
Within the Dispatch screen, the Route Disposal Records now include the option to remove a disposal ticket from the list by selecting the removal icon associated with the ticket.

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)

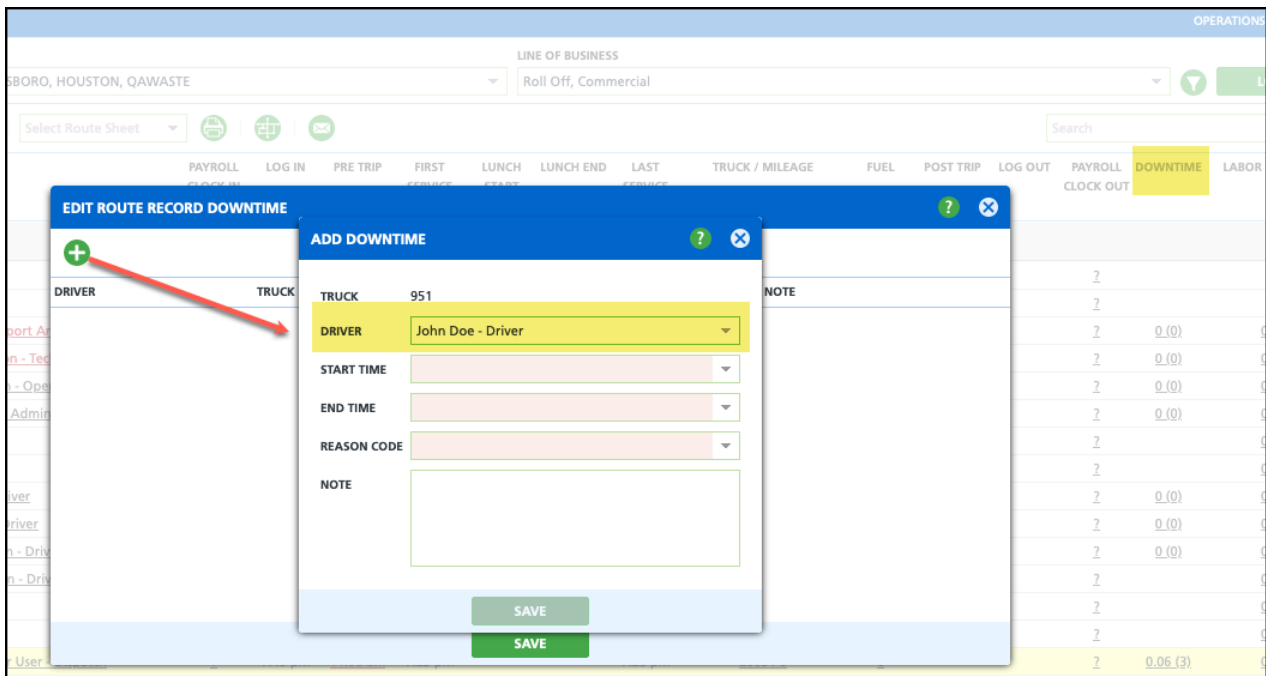
A previous issue with the Route Dispatch Map not allowing users to save a Work Status change when the polygon tool was used has been successfully resolved.



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#		QTY	CHARGE QTY	EQUIPMENT	REVENUE	RECURRING RATE	POSTING STATUS	
<input checked="" type="checkbox"/> HOU 201	44892001 Pearlland CHRISTMAS TREES 1234 Example St. Drive, Pearlland	Tue 10/10/23	6584049	Ready to Post Post	1	0	6 Yard FL		\$ 206.83	Posted	
<input checked="" type="checkbox"/> HOU 201	43890032 - WEST PEARLAND LIBRARY 1111 Learning Way, Pearlland	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	
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									
	LOAD									
	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						
	LOAD						
	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.

SITE SERVICE CHARGE RATE UPDATE BATCH: 1020

GRID VIEW: Standard | CHANGE TYPE: Amount | AMOUNT: -100.0000 | APPLY | EFFECTIVE DATE: 10/02/2023 | Search

<input type="checkbox"/>	SITE ID	NAME	CITY	CHARGE CODE	CURRENT RATE	NO CHARGE QUANTITY	NEW RATE	VAR
<input type="checkbox"/>	48354001		Rockport	Roll Off Haul	\$ 565.00	0	\$ 585.00	
<input type="checkbox"/>	33977003		Odem	Roll Off Haul	\$ 595.00	0		
<input type="checkbox"/>	48788001		Aransas Pass	Roll Off Haul	\$ 550.00	0	\$ 570.00	
<input type="checkbox"/>	32875006		SINTON	Roll Off Haul	\$ 550.00	0	\$ 500.00	
<input type="checkbox"/>	32767047		Beeville	Roll Off Haul	\$ 600.00	0		
<input type="checkbox"/>	32880003		TAFT	Roll Off Haul	\$ 600.00	0		
<input type="checkbox"/>	48781001		Rockport	Roll Off Haul	\$ 620.00	0		
<input type="checkbox"/>	33786002		Port Aransas	Roll Off Haul	\$ 625.00	0		
<input type="checkbox"/>	42546001		ALICE	Roll Off Haul	\$ 625.00	0		
<input type="checkbox"/>	46104001		Alice	Roll Off Haul	\$ 650.00	0		

EXPORT IMPORT | 951 records / 1 selected / 951 visible | POST VOID CLOSE

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.

DIVISION: All | SALES REP: Dave Pike, House Account (Sales), House Acct non S

Estimated Close

	High	Medium
Prior Month	0	\$ 1,159.78
Current Month	0	\$ 844
Next Month	0	0
In 2 Months	0	0
In 3+ Months	0	0

VIEW CONTACT

Details | Account Portal Access | Tags | Activity History

TITLE: | NAME: GLORIA | EMAIL: | EMAIL 2: | PHONE 1: (999) 999-9999 | PHONE 2: (999) 999-9999 | PHONE 3: (999) 999-9999 | PHONE 4: (999) 999-9999 | NOTE: |

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 Acct no
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:
 - Sales Rep
 - Estimated Closing Date
 - Start Date
 - Probability
 - Double click within the row of a proposal to open the Edit Proposal window.

SALES OPPORTUNITIES SALES > PIPELINES > OPPORTUNITIES

DIVISION 2 **SALES REP** Aliena Somers (Adr) **ACCOUNT CLASS** BROKER, COMMER **STATUS** Open, Submitt **FORM TYPE** Proposal, Servi **TEMPORARY / PERMANENT** 1 Permanent, Temporary ☐ LIMIT TO PROSPECTS

Estimated Close **Closing Probability**

3 **GROUP BY** Month ☒ High ☒ Medium ☒ Low

4 ☒ Prior Months ☒ 2023-NOV ☒ 2023-DEC ☒ 2024-JAN ☒ 2024-FEB + Future

	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

5 **PROPOSAL ID** **SITE NAME** **CONTACT** **NEXT STEP** **STATUS** **SALES REP** **MONT...** **ESTIMATED** **START DATE** **PROBA...** **FORMAT** **FORM** **PROPOSAL** **ACCOUNT**
REV. CLOSING DATE **TYPE** **PROPERTIES** **PROPERTIES**

7 **6**

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 (selected)

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

HOUSTON

Details

Credit Card / ACH Processing

Cost / Target Pricing

Inter-company

DIVISION ID

1004

NAME

HOUSTON

Legal Address

NAME

QA Waste Services

ADDRESS LINE 1

PO BOX 260311

ADDRESS LINE 2

CITY

Houston

STATE

TX

POSTAL CODE

78426

Bill Remit Address

NAME

QA Waste Services - HOUSTON

ADDRESS LINE 1

PO Box 260310

ADDRESS LINE 2

CITY

Corpus Christi

STATE

TX

POSTAL CODE

78426

MAIN PHONE

(936) 258-9035

TOLL FREE PHONE

(999) 999-9999

FAX

(999) 999-9999

EMAIL

HOU_Div@navusoft.com

TIME ZONE

Central Standard Time

AUTO PROCESS SERVICE CHANGES

Active Service

ENABLE INTEGRATION

None

LOCKBOX IMPORT FORMAT

Signature Waste Import

LOCKBOX NON-MATCHING ACCOUNT

48976

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 ↑

Approved Universal Waste BOL

BWS Manifest 1

BWS Non Hazardous Manifest

Document Destruction Manifest

E360 Manifest 1

GIC Medical Manifest1

Hazardous Material Manifest

Healthwise Document Destruction Manifest

Medical Waste Manifest

Mediwest Bill of Lading

Mediwest Document Destruction Manifest

Mediwest Manifest

Mediwest 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

BACKGROUND

CUSTOM TEXT




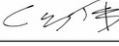
WORK ORDER BILL OF LADING

WORK ORDER BILL OF LADING

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).

 <p>DAYTON PO BOX legal addr 2 Corpus Christi, TX 78426</p>		<p>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: _____ Time Window: 3:00 AM-12:00 PM;12:30 PM-7:00 PM Arrival Time: _____ Depart Time: _____</p>			
<p>Site #: 48910001 PO #: Account Name: LIBERTY SITE Service Address: _____ Service City: West Chester Site Contact: Site Phone: _____</p>		 <p>Service Description Regulated Medical Waste Service</p>			
Work Order	Qty	Action	Type	Serial Numbers	Destination
6536142	1	Scheduled RMW Service			
<p>Work Order Notes:</p> <p>Access Notes:</p> <p>Detailed Notes:</p> <p>Service Notes: Added new code with max weight ID</p>					
		<p>Aug 30, 2023</p>			
DRIVER SIGNATURE		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	DEFAULT HOMEPAGE	Recent Activity
FIRST NAME	Ted	ONLINE IMAGE	Select Image... BROWSE...
LAST NAME	Brister		
EMAIL	tbrister@email.com		
CELL PHONE	(999) 999-9999		
OFFICE PHONE	(999) 999-9999		
TITLE	IT & Reporting		
DEPARTMENT	Admin	AUTOMATIC COUNTERSIGN	No
MANAGER	David Grant - Driver (Operations)	SIGNATURE IMAGE	Select Image... BROWSE...
SALES GOAL TYPE	Revenue		
EXTERNAL ID	21		
EXTERNAL USER ID			
DEFAULT APP COLOR	Blue		
WORKER COST PER HOUR LEVEL			

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	Status Management	
ACTIVE	Yes	ENABLE AUTOMATIC STATUS UPDATE	No
TYPE	Business	AUTO CREDIT HOLD PAST DUE DAYS	0
GL ACCOUNT	Accounts Receivable	AUTO CREDIT HOLD MINIMUM PAST DUE AMOUNT	0.00
GL SEGMENT	12000	AUTO INACTIVE ACCOUNT/SITE DAYS	0
DEFAULT ACCOUNT CREDIT LIMIT	0	AUTO CREDIT HOLD PLACEMENT	No
DEFAULT ACCOUNT TERM	Net 20	AUTO CREDIT HOLD REMOVAL	No
DEFAULT REBATE PAYMENT TYPE	Not Applicable	STATUS UPDATE TIME	12 AM
DEFAULT BILL BY SITE	No		Pacific Standard Time
CREATE CONTACT DEFAULT	Account	RUN DAILY AUTO APPLY	No
DEFAULT CONTACT SERVICE NOTIFICATION	Yes		
GEOCODING TYPE	Roof Top	Finance Charges / Late Fees	
GEOFENCE RADIUS (METERS)	30	FINANCE CHARGE TYPE	One Time Fee Per Invoice
NEW ACCOUNT NOTIFICATION TEMPLATE		RATE	None
REQUIRE GENERATOR TYPE	No		During Billing
ENABLE LINKING CONTACTS TO ALL SITES	Yes	CHARGE CODE	Accrued Daily
LOAD ACTIVE ACCOUNTS IN PIPELINE MAP	Yes	CHARGE MINIMUM	Manual Flat Fee
REQUIRE BILLING CONTACT	No		One Time Fee Per Invoice
EXCLUDE FROM NAVU SALES	No	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 displays the 'ADD ACCOUNT CLASS' interface. At the top, a blue header bar contains the title and a help icon. Below the header, a tabbed interface is shown with five tabs: 'Details', 'Account Portal', 'Payment Processing', 'Status Management', and 'Finance Charges / Late Fees'. The 'Status Management' tab is currently selected, indicated by a red circle with the number '1'. The 'Details' tab is active, showing a list of fields on the left and a list of settings on the right. The left column includes fields for NAME, ACTIVE, TYPE, GL ACCOUNT, GL SEGMENT, DEPOSIT GL ACCOUNT (highlighted with a red circle and number '2'), DEPOSIT GL SEGMENT, DEFAULT ACCOUNT CREDIT LIMIT, DEFAULT ACCOUNT TERM, DEFAULT REBATE PAYMENT TYPE, and DEFAULT BILL BY SITE. The right column includes settings for 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. A red circle with the number '3' is placed over the 'GEOCODING TYPE' field. At the bottom of the screen, there is a 'SAVE' button.

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

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.

The screenshot shows the 'UPDATE SERVICE CODE' window with the 'Service Code' tab selected. The 'ENABLE RECURRING MINIMUM' field is highlighted in yellow and set to 'Yes'. Other fields include SERVICE CODE (RO10T), NAME (10 Yard Open Top Service), LINE OF BUSINESS (Roll Off), EQUIPMENT TYPE (10 Yard Roll Off), MATERIAL TYPE, UOM (month), TAXABLE (Yes), GL ACCOUNT (Service Income:Roll Off Service In), PRORATION METHOD (Calendar Days - Start and End), BILL WHILE ON CREDIT HOLD (Yes), IS AP TRANSACTION (No), ACTIVE (Yes), ENABLE ROUTING (Yes), REQUIRE FREQUENCY (Yes), ENABLE DRIVER UPDATE (No), ENABLE ACCOUNT SIGNATURE (No), ENABLE DRIVER SIGNATURE (No), ENABLE WORK ORDER MINIMUM (No), ENABLE RENTAL FEE (Yes), ENABLE DEFAULT DESTINATION (Yes), and ENABLE NEGATIVE AMOUNT (No).

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.

The screenshot shows the 'ADD ACTIVE SERVICE' window. The 'MINIMUM PER MONTH' field is highlighted in yellow. A pop-up window titled 'ACTIVE SERVICES (4)' is open, showing a list of services. The 'Recurring Minimum: \$ 85.00 per month' is highlighted with a red arrow. The pop-up also shows a 'CALENDAR' view for October 2023, with dates Oct 1, Oct 2, Oct 3, Oct 8, Oct 9, and Oct 10 marked. The background shows the 'ADD ACTIVE SERVICE' form with fields for 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, and a 'Map' button.

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 'Order Processing' interface with tabs for 'New Customer/Site', 'Service Changes', and 'Online On-Call Orders'. The 'Service Changes' tab is active. Below the tabs are filters for 'DIVISION' (All), 'STATUS' (All Open), 'SOURCE' (Service Add/Change), and 'LOB' (Commercial, Docun). There is a 'Show On Hold' checkbox and a 'LOAD' button. The main table lists services with columns for 'SUBMITTED DATE', 'ACCOUNT', and 'EFFECTIVE DATE'. A red arrow points to the 'Recurring Minimum: \$ 85.00 per month' field in the 'Roll Off Service Minimum Charge' row.

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 background window is 'ADD SERVICE' with fields for '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), and 'MINIMUM PER MONTH' (200.00). The foreground window is 'EDIT PROPOSAL - 3886' with tabs for 'Settings', 'Services', 'History', 'Attachment', and 'Master Agreement'. The 'Services' tab is active, showing a table with columns for 'SITE ID', 'START DATE', 'QTY', 'SERVICE CODE', 'FREQUENCY', 'RATE', and 'VENDOR RATE'. A red arrow points to the 'Recurring Minimum: \$ 200.00 per month' field in the table.

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

SITE ID	START DATE	QTY	SERVICE CODE	FREQUENCY	RATE	VENDOR RATE
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

EXPAND ALL

COLLAPSE ALL

Last Updated: 10/16 3:22 pm

Search

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 cly

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

Holiday Schedule Items

+

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' screen. At the top, there are dropdowns 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 list of charge codes is displayed, including '18 Gal Box Per Pound', '18 Gal Box Per Container - RMW', '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', '30 Gal Box Per Container - Pharma', '43 Gal Reusable Per Container - RMW', and '43 Gal Reusable Tiered - RMW'. A blue validation dialog box is overlaid on the screen, stating: 'Charge Code must be added by clicking + before editing settings.' with an 'OK' button.

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 screens. The top screen is 'SYSTEM OPTIONS SETUP' with tabs for System, Sales, Integration, Account, Operations, Account Portal, Broker, and Online Order. The 'Integration' tab is selected. It contains fields for 'GL EXPORT FORMAT' (Sage), 'BI INTEGRATION DATABASE', 'UPS ACCESS KEY', 'USPS ACCESS KEY', 'ENABLE ERP INTEGRATION' (Yes), and 'ERP ID LABEL'. A red box highlights the 'ENABLE ERP INTEGRATION' field. The bottom screen is 'TAX REGION SETUP' with a table of tax regions. A red arrow points from the 'ENABLE ERP INTEGRATION' field to the 'ERP ID' column in the table.

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.

Make a 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

Account Balance Due

\$ (250.00)

\$ 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.

SELECT ACCOUNT

1 of 8

20306 JONES TERESA

SELECT SERVICE LOCATION

1 of 1

20306001 JONES TERESA 123 COUNTY ROAD 4022, DAYTON TX

TEST MESSAGE TESTING

Reports / Documents

RECENT SERVICES

	ID	SERVICE
Fri Jun 30, 2023	6603176 (Service Completed)	2 Yard Trash Service
Thu Jun 29, 20...	6151556 (Service Completed)	2 Yard Trash Service
Thu Dec 29, 2...	5080211 (Service Completed)	2 Yard Trash Service
Thu Dec 22, 2...	5043533 (Service Completed)	2 Yard Trash Service
Thu Dec 15, 2...	5006990 (Service Completed)	2 Yard Trash Service

UPDATE ACCOUNT CLASS

Details

Account Portal

Payment Processing

ENABLE PORTAL ACCESS

Yes

ACCOUNT PORTAL HOME PAGE

Service Map and Re

ENABLE ADD SITES

No

NEW LOCATION TEMPLATE

NEW LOCATION BUNDLE

ENABLE ON CALL ORDERS

No

ENABLE REPORT ACCESS

Yes

ENABLE SERVICE PHOTO DISPLAY

Yes

ENABLE VIEWING INACTIVE SITE

Service History Only

Service History Only

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.

SELECT ACCOUNT

1 of 7

12345 SUNLAND CONSTRUCTION INC

Accounts Receivable

Service Map

Requests

Disposal Tickets

Satellite

Scheduled Date

08/31/2023

Service Code

800 Bagby St. Garage

Zilkha Hall

The Hobby Center for the Performing Arts

Houston City Hall Annex

Sam Houston Park

Houston Strong Mural

Diana New American

611 Walker St Garage

Houston City Hall

Hermann

AMC Houston 8

PK Garage

Theater District

Shopping mall

Pathway: Customer Portal > Service Map > Export Icon

