

Release Version 71 [Archive]

Last Modified on 08/06/2025 7:59 am PDT



The release notes in this article correspond to version 71. Screens and logic may have changed in newer versions.

Accounts

AR History - Logic Updated to Single Invoices if Account has a Billing Batch in Progress (15911) [Enhancement]

The logic has been revised to restrict the generation of a single invoice when a billing batch is currently in progress for the account. In the image below, 'Generate Invoice' is unavailable and the billing batch is referenced in red text at the top of the screen.

Pathway: Accounts (Customer Service screen) > AR History > Invoice

AR History - Grand Total Added to 'Create Invoice' Screen (15905)[Enhancement]

The Create Invoice screen has been updated to include a Grand Total at the bottom.

AR HISTORY

CURRENT	1-30 DAYS	31-60 DAYS	61-90 DAYS	91-120 DAYS	120+ DAYS	TOTAL
0.00	0.00	0.00	0.00	0.00	16,395.45	16,395.45

Limit to open items **STATEMENT** **INVOICE** **AUTO APPLY** **BALANCE WRITE OFF** **PAYMENT METHODS (4)** Search

CREATE INVOICE

This Site **BILL TO DATE** 12/29/2023 **INVOICE DATE** 10/24/2023 **Arrears - Monthly**
Billed Thru Date Nov 30, 2022
Next Invoice Date Apr 30, 2023 BATCH-25689 (not started)

SITE ID	START DATE	END DATE	GROSS QTY	NO CHARGE QTY	QTY	NAME	PO #	AMOUNT	SURCHARGES	TAXES	TOTAL
45170020	05/01/23	05/31/23			1	8 Yard Recycle Service		\$ 221.00	\$ 0.00	\$ 18.24	\$ 239.24
45170020	06/01/23	06/30/23			1	8 Yard Recycle Service		\$ 221.00	\$ 0.00	\$ 18.24	\$ 239.24
45170020	07/01/23	07/31/23			1	8 Yard Recycle Service		\$ 221.00	\$ 0.00	\$ 18.24	\$ 239.24
45170020	08/01/23	08/31/23			1	8 Yard Recycle Service		\$ 221.00	\$ 0.00	\$ 18.24	\$ 239.24
45170020	09/01/23	09/30/23			1	8 Yard Recycle Service		\$ 221.00	\$ 0.00	\$ 18.24	\$ 239.24
45170020	10/01/23	10/31/23			1	8 Yard Recycle Service		\$ 221.00	\$ 0.00	\$ 18.24	\$ 239.24
45170020	11/01/23	11/30/23			1	8 Yard Recycle Service		\$ 221.00	\$ 0.00	\$ 18.24	\$ 239.24
Recurring Service 127447 - Enclosure											
45170020	12/01/22	12/31/22			1	Enclosure		\$ 41.07	\$ 0.00	\$ 3.40	\$ 44.47
45170020	01/01/23	01/31/23			1	Enclosure		\$ 41.07	\$ 0.00	\$ 3.40	\$ 44.47
45170020	02/01/23	02/28/23			1	Enclosure		\$ 41.07	\$ 0.00	\$ 3.40	\$ 44.47
45170020	03/01/23	03/31/23			1	Enclosure		\$ 41.07	\$ 0.00	\$ 3.40	\$ 44.47
45170020	04/01/23	04/30/23			1	Enclosure		\$ 41.07	\$ 0.00	\$ 3.40	\$ 44.47
45170020	05/01/23	05/31/23			1	Enclosure		\$ 41.07	\$ 0.00	\$ 3.40	\$ 44.47
45170020	06/01/23	06/30/23			1	Enclosure		\$ 41.07	\$ 0.00	\$ 3.40	\$ 44.47
45170020	07/01/23	07/31/23			1	Enclosure		\$ 41.07	\$ 0.00	\$ 3.40	\$ 44.47
Total								\$ 6,510.03	\$ 0.00	\$ 537.27	\$ 7,047.30

GENERATE INVOICE

Pathway: Accounts (Customer Service Screen) > AR History

AR History - Functionality For Payment Deposits (15883)[Enhancement]

Functionality has been improved to enable the transfer of a deposit that has been converted into a payment to another account.

AR HISTORY

CURRENT	1-30 DAYS	31-60 DAYS	61-90 DAYS	91-120 DAYS	120+ DAYS	TOTAL
-149.30	0.00	0.00	0.00	0.00	398.29	248.99

DEPOSIT AMOUNT -50.00

Limit to open items **STATEMENT** **INVOICE** **AUTO APPLY** **BALANCE WRITE OFF** **PAYMENT METHODS (1)** Search

DATE	DUE DATE	PERIOD	SITE ID	TYPE	REFERENCE NO	AMOUNT	APPLIED AMOUNT	BALANCE
10/20/23	2023-10			Deposit - Check	3225	(50.00)	0.00	(50.00)
03/01/23	03/21/23	2023-03		Invoice	883304			119.66
02/15/23	2023-02			Payment - Check	162		0.00	(99.99)
02/01/23	02/21/23	2023-02		Invoice	869628		(10.00)	109.66
01/01/23	01/21/23	2023-01		Invoice	860416			119.66
11/15/22	12/05/22	2022-11		Invoice	834917	284.50	(235.19)	49.31
10/07/22	2022-10			Payment - Bank Account - eCheck	53152083_AUTH N...	(393.63)	344.32	(49.31)

Context menu for Deposit - Check (3225):

- Email
- Print Receipt
- Reverse / Transfer / Split
- Convert to Payment

Pathway: Accounts (Customer Service Screen) > AR History

Labels (Hazardous Waste) - New Generic Label Created (15922)[Enhancement]

A new '4x6 Hazardous Waste Label - With Background' option has been included in the Print Work Order Labels list on the Edit Service Record screen.

EDIT SERVICE RECORD

LouLou Doctor Service

West Chester, OH 45069-1010
EPA: EPA_234324 / State: ST_878
PHONE +1 513-555-6565

CREATED BY
Lori Sheldt on 9/8/23 12:55 am

ORDER REASON

WORK ORDER 6645000 QTY 1 SERVICE CODE Hazardous Waste Services WORK TYPE SCVC_HAZ ORDER TYPE Scheduled Service MATERIAL HAZCHEM

ORDER NOTES

PO NUMBER EXTERNAL ID

SCHEDULED DATE 10/23/23 Monday ROUTE DAY 701

WORK STATUS Scheduled EXCEPTION REASON

Charges **2** Payments Completion Attachments Labels Photos

☐ Charges must match Equipment
☐ Charges must match Material

WO MINIMUM

PRINT WORK ORDER LABELS

4x6 Hazardous Waste Label - With Background

Format 1
Format 2
Format 3
Format 4
WO Labels-Universal

HAZARDOUS WASTE

FEDERAL AND/OR STATE LAWS PROHIBIT IMPROPER DISPOSAL.
IF FOUND, CONTACT THE NEAREST POLICE OR PUBLIC SAFETY AUTHORITY, THE U.S. ENVIRONMENTAL PROTECTION AGENCY
OR THE DEPARTMENT OF ENVIRONMENTAL PROTECTION.

GENERATOR INFORMATION:

NAME: LouLou Doctor Service PHONE: (513) 555-6565

ADDRESS West Chester OH - 45069-1010


MANIFEST TRACKING NUMBER: 6645000 ACCUMULATION START DATE: 2023-10-23

EPA ID NUMBER: EPA_234324 EPA WASTE CODES: D001.F003

UN1993, WASTE FLAMMABLE LIQUID, N.O.S. (ACETONE, METHANOL) 3, PG II

D.O.T. PROPER SHIPPING NAME AND UN OR NA NUMBER WITH PREFIX


HANDLE WITH CARE!



Pathway: Work Order (search) > Charges (tab)

Invoice Display - Screen Updates (15955)[Enhancement]

Improvements have been applied to the format and display of the 'Account Balance Due' and 'Past Due' fields, along with the 'Make a Payment' button for invoices. Additionally, a "Login to Portal" link has also been added.



Account Balance Due
\$ 14,649.05

Past Due
\$ 13,597.17

Make a payment

[Login](#)

888844

Site 43178002 - CVS
10908 - 7110
MAGNOLIA RD
PEARLAND, TX 77584

QA Waste Services
PO BOX 260311
Houston, TX 78426

PO BOX 778
DES MOINES, IA 50303-0778

INVOICE # 888844
ACCOUNT # 44670
AMOUNT \$ 1,051.88
DATE Nov 8, 2023
DUE DATE Dec 8, 2023

Pay Online
<https://navuga-customerportal.navusoft.net/>
login or use **QUICK PAY CODE** C97CC

Pay By Check PO Box 260310
Corpus Christi TX 78426

Enclosed Check #
Amount

For proper credit return this portion

Site 43178002 - CVS 10908 - 7110 MAGNOLIA RD PEARLAND, TX 77584

DATE	DESCRIPTION	WO #	PO #	QTY	RATE	TOTAL
09/27/23 - 09/30/23	10 Yard Open Top Service			1	\$ 0.00 per month	0.00
10/01/23 - 10/31/23	10 Yard Open Top Service			1	\$ 0.00 per month	0.00
11/01/23 - 11/30/23	10 Yard Open Top Service			1	\$ 0.00 per month	0.00
11/01/23 - 11/30/23	4 Yard Trash Service			1	\$ 101.25 per month	101.25
11/01/23 - 11/30/23	6 Yard Recycle Service			1	\$ 108.19 per month	108.19
11/01/23 - 11/30/23	6 Yard Trash Service			1	\$ 206.83 per month	206.83
11/01/23 - 11/30/23	Enclosure			1	\$ 13.69 per month	13.69
11/01/23 - 11/30/23	Enclosure			1	\$ 27.38 per month	27.38
12/01/23 - 12/31/23	10 Yard Open Top Service			1	\$ 0.00 per month	0.00
12/01/23 - 12/31/23	4 Yard Trash Service			1	\$ 101.25 per month	101.25
12/01/23 - 12/31/23	6 Yard Recycle Service			1	\$ 108.19 per month	108.19
12/01/23 - 12/31/23	6 Yard Trash Service			1	\$ 206.83 per month	206.83
12/01/23 - 12/31/23	Enclosure			1	\$ 27.38 per month	27.38
12/01/23 - 12/31/23	Enclosure			1	\$ 13.69 per month	13.69
	Pearland Franchise Fee					137.20
	Site Total					\$ 1,051.88

INVOICE TOTAL \$ 1,051.88

This is the default invoice message at the billgroup level.


Invoice Inquiries contact us by email HOU_Div@navusoft.com or call us at (936) 258-9035

Page 1 of 1

Pathway: Accounts (Customer Service Screen) > AR History > Print Invoice

Invoice Format Improvements for Format 12 (16059)

The position and placement of the recipient address for invoice Format 12 has been improved to display within an envelope's window dimensions.

 PO BOX 260310 legal addr 2 Corpus Christi, TX 78426 PHONE: [REDACTED] https://navuqa-customerportal.navusoft.net/	INVOICE # 228838 AMOUNT 144.12 ACCOUNT # 21198 DATE Nov 5, 2021 QUICK PAY CODE 2B1AD DUE DATE Nov 25, 2021					
SUPER 90 ADAM'S QUICK STOP [REDACTED] RAYWOOD, TX 77582-0098	MAKE ALL CHECKS PAYABLE TO: QA Waste Services PO BOX [REDACTED] remit addr 2 Dayton, OH 45134 PHONE: [REDACTED]					
For proper credit return this portion						
Site 21198001 - SUPER 90 ADAM'S QUICK STOP - 13768 HWY 90 RAYWOOD, TX 77582 - Continued...						
DATE	DESCRIPTION	WO #	PO #	QTY	UNIT RATE	TOTAL
12/01/21 - 12/31/21	4 Yard Trash Service			1.00	\$ 135.00 per month	135.00
					Tax	\$ 9.12
					Site Total	\$ 144.12
INVOICE TOTAL						\$ 144.12
	2021-11-08	eCheck 4500	40231313_AUTH NUM 24			-144.12
INVOICE BALANCE						0.00
Current	1-30 Days	31-60 Days	61-90 Days	Over 90 Days	Total Due	
144.12	0.00	0.00	0.00	0.00	144.12	
Total balance due includes current charges, however it may not reflect recent payments in transit.						

Pathway: Search - Invoice

Invoices - Linked Items Now Display with 'Email Invoice with PDF Attachment' (16070) [Enhancement]

"Email Invoice with PDF Attachment" has been improved to included linked items such as tickets and images.

invoice_888905[75].pdf
Page 1 of 4

invoice_888905[75].pdf

1

2

3

QA Waste Services
Liberty Township, OH 45011-9077
PHONE: [REDACTED]

California Grill & Bar
6751 Painter Ave
Whittier, CA 90601-4409

INVOICE # 888905
AMOUNT \$ 712.00
ACCOUNT # 49018
DATE Dec 7, 2023
QUICK PAY CODE 4B82C
DUE DATE Dec 27, 2023

MAKE ALL CHECKS PAYABLE TO:
QA Waste Services
Liberty Township OH 45011-9077

0049018000088905000712002

Site 49018001 - California Grill & Bar - 6751 Painter Ave Whittier, CA 90601

DATE	DESCRIPTION	WO #	PO #	QTY		TOTAL
12/07/23	Roll Off Delivery	7073768		1	\$ 50.00 each	50.00
12/07/23	Roll Off Disposal Per Ton	7073769		2.3	\$ 30.00 per ton	69.00
12/07/23	Roll Off Haul	7073769		1	\$ 250.00 each	250.00
12/07/23	Roll Off Disposal Per Ton	7073770		3.1	\$ 30.00 per ton	93.00
12/07/23	Roll Off Haul	7073770		1	\$ 250.00 each	250.00
	Surcharge					\$ 0.00
	Tax					\$ 0.00
	Site Total					\$ 712.00

INVOICE TOTAL \$ 712.00

Current	1-30 Days	31-60 Days	61-90 Days	Over 90 Days	Total Due
712.00	0.00	0.00	0.00	0.00	712.00

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

NOTICE TO CUSTOMERS—The maximum rate that may be charged by your trade waste removal business is regulated by the New York City Business Integrity Commission. If you should have a question or complaint concerning waste-removal, contact the New York City Business Integrity Commission.

The Business Integrity Commission (BIC) sets the maximum rates that private carters can charge for certain types of putrescible and recyclable waste removal services. A customer cannot be charged above the maximum rate, but the customer and carter can negotiate a rate below the maximum rate.

Effective as of October 31, 2022, the maximum rates allowed to be charged by the private carters are:

\$24.21 per cubic yard of loose refuse (volume), or
\$15.89 per 100 pounds of refuse (weight)

The customer and carter can negotiate whether the customer will be charged by volume or by weight.

NOTES AND COMMENTS

Pathway: Accounts > Search > Accounts

Service Records - Update to Decimal Logic for Charge Gross Qty and Charge Qty (16009) [Enhancement]

Service Record logic has been updated to **prevent** the rounding of the Gross Qty and Charge Qty fields to 2 decimal places.

EDIT SERVICE RECORD

Navu BUILDING SUPPLY #112
1234 TEXAS 146
DAYTON, TX 77535
PHONE (555) 555-1234
CREATED BY David Navarro on 9/29/23 12:55 am
ORDER REASON

WORK ORDER 6743235 QTY 1 SERVICE CODE 30 Yard Open Top Service EQUIPMENT 30YD WORK TYPE RO_DUMPRET ORDER TYPE Scheduled Service

ORDER NOTES

PO NUMBER EXTERNAL ID

SCHEDULED DATE 11/13/23 Monday ROUTE DAY 302 SEQUENCE 0 DESTINATION / ORIGIN

WORK STATUS Scheduled EXCEPTION REASON POSTING STATUS Pending

Charges \$ 408.49 Source Location Disposal / Ship Payments Completion Attachments Labels Photos

☐ Charges must match Equipment
☐ Charges must match Material

WO MINIMUM

GROSS QTY	LABELS	NO CHARGE QTY	CHARGE QTY	UOM	CHARGE CODE	PER UNIT	VENDOR RATE	MINIMUM TYPE	MINIMUM	TOTAL
1			1	each	Roll Off Haul	\$ 315.51		Amount	\$ 0.00	\$ 315.51
2.3245			2.3245	ton	Roll Off Disposal Per Ton	\$ 40.00		Amount	\$ 0.00	\$ 92.98

Pathway: Accounts (Customer Service Screen) > Service Record - Charges tab

Edit Account/Site - Option to Change The Division for Accounts and Sites (16011)(16010)

[Enhancement]

Accounts

An enhancement has been applied to allow editing of the Division field for accounts. Previously, attempting to edit this field when an Accounts Receivable (AR) record existed would result in an error message.

For this enhancement, a new permission has been added:

- 450 - Edit Account Division

Logic:

- Users must have permission 450 to edit account divisions.
 - **IF** the account is in a Prospect status, users can change the division without permission 450.
- Upon selecting a new division, the Bill Group field is cleared and a new one must be selected (Settings tab).

Site

An enhancement has been applied to allow editing of the Division field for sites. For this enhancement, a new permissions has been added:

- 338 - Edit Site Division

Logic:

- Users must have permission 338 to edit site divisions.
 - **IF** the site is in a Prospect status, users can change the division without permission 338.
- If a division is changed on a site with active site service(s) schedule, a popup will display advising the user to assign the site's active service(s) to a new route. The existing route will be ended upon a division change.
- Upon selecting a new division, the Service Region field for the site will be cleared and a new one must be selected.
- Upon selecting a new division, if 'Site Bill Groups' is enabled, the Bill Group field is cleared and a new one must be selected.

EDIT SITE

Basic Settings

Billing Settings

BIC Profile

Required Capabilities

NAME

Example Site 1

NAME 2

ADDRESS LINE 1

2222 Navu Cir

ADDRESS LINE 2

CITY/STATE/POSTAL CODE

Corpus Christi TX 78411

PHONE 1

(361) 854-7777 Office

PHONE 2

(999) 999-9999

OLD ID

PO#

123456

SIGNATURE REQUIRED

☒

LEED REPORTABLE

☐

NOTE

delete

WARNING ON OPEN

ACCESS INFORMATION

BUSINESS HOURS / SERVICE WINDOW

Weekdays

Open 6:00 AM Close 4:00 PM

DIVISION

CORPUS

SERVICE REGION

CORPUS OPEN MARKET

TAX REGION

NUECES COUNTY-CORPUS CHRIST

ORIGIN

SOURCE

Cold Call

SALES REP

House Account (Invalid)

SITE CLASS

GENERATOR

Not Applicable

EPA

STATE ID

ADDITIONAL SERVICE MINUTES

SAVE

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

Accounts (Proposals) - Service Agreement to Display Required Payment Information (15020) [Enhancement]

Red text with payment requirements has been added to the Service Agreement if a deposit is required and the amount is greater than \$0.00. With this change, proposals can only be marked 'Sold' if both the signature and deposit are received.

QA

FORMAT 1 - PAGE 1

FORMAT 1 - PAGE 2

FORMAT 1 - PAGE 3

SEND MESSAGE

Payment in the amount of \$ 200.00 is required for processing of this order / agreement.

SIGN & ACCEPT

SERVICE LOCATION MAP

1 of 3

QA Waste

Exclusive contract made effective Dec 7, 2023 , by business is located at Houston, TX and the below gen

Generator Information:

888 RESTAURANT

Billing Name

1325 BROADWAY ST

Billing Address Line 1

Billing Address Line 2

Pathway: Search > Accounts > Orders, Quotes, and Contracts (section)

Accounts - Transfer Service Option Relocated and Logic Updates (16063)[Enhancement]

A modification has been implemented to move the "Transfer Service" option from the customer service menu's list of choices to the "Active Services" section. To initiate a transfer, right-click on the relevant service and choose 'Transfer Service' from the menu.

Additionally, the following logic has been changed:

- The Transfer Service window will only load the service that was clicked on.
- The Transfer Service window will disable the 'Create Work Order', Route, Date and Work Order Notes fields of the service being transferred if Add/End is not available for the Work Type Event Class' work flow.
- In the Transfer Service window, the top 'Create Work Order' check box has been renamed to "Create Removal WO."
- In the Transfer Service window, the bottom 'Create Work Order' check box has been renamed to "Create Delivery WO."

Pathway: Accounts > Search > Accounts

Accounts - Default Logic Updated for Accounts When Status Changes from Prospect to Active (15936) [Enhancement]

The following default setting logic has been updated to accounts when the status changes from Prospect to Active:

1. In Account Class Setup, values found in the *Default Account Term*, *Default Account Credit Limit*, and *Default Rebate Payment Type* fields will auto-populate for the account.
2. By default, 'Auto Status Update' and 'Apply Finance Charges' check box fields in Edit Account (Settings) will default to being checked.

EDIT ACCOUNT

Account Settings

Billing

BILL GROUP: DAY-BAD DEBT \ INACTIVE

Arrears - Monthly Billed Thru Date Oct 31, 2023 Next Invoice Date

INVOICE BY EMAIL: Email With Link

TERM: Net 20

CREDIT LIMIT: 160

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

Pathway: Accounts > Search > Accounts; Setup > Account > Account Class

Accounts - Scale Ticket Modifications (16094)[Enhancement]


The following changes have been made to the Scale Ticket:

1. The placement of the site address and division addresses have been flipped.
2. A Driver Signature line has been added.
3. A Weighmaster Signature line will populate with the user's stored signature.



1

QA Waste Services
PO BOX 260311
Houston, TX 78426



Scale Test
8100 Washington Ave
Houston, TX 77007

VEHICLE BLUETRUCK

TRANSPORTER

PO #

REQUESTED BY

NOTES lkjklkjklj

SCALE TICKET 40955

DATE May 2, 2023

SITE ID 48921001

TIME IN 12:40 PM

TIME OUT

MATERIAL MSW

WEIGHT IN lbs

WEIGHT OUT 2,300 lbs

NET lbs

Description	Gross Qty	No Charge Qty	Charge Qty
Trash	14	0	14 tons
Tires	2	0	2 ea
Stryofoam	2	0	2 cuyds


Payments

Description	Reference	Amount	Notes
Cash	one	\$ 1.00	cash one
Check	two	\$ 2.00	check two
Debit Card	four	\$ 4.00	Debit four
Money Order	five	\$ 5.00	Money Order five
Credit Card	71984265_9999	\$ 200.00	
Total Payment		\$ 212.00	

2

Driver Signature _____

3

Weighmaster Signature  _____

Pathway: [Accounts](#) > [Search](#) > [Accounts](#)

Accounts - Service Record Weight Added to Multiple Screens (16102)[Enhancement]

An enhancement has been made to display the Service Record Weight detail in the following locations:

1. As a link in the Completion tab of the Service Record. Select the link to open the Service Record Weight window.
2. In the Services List screen under the 'Completion Data' view.
3. In the Customer Analysis & Reports screen for the 'Work Order Weights' Type.

PTC BUILDING 1000 (10T)

7746110-005

8100 Washington Ave

Pearland, TX 77584-9785

PHONE (555) 555-5555

CREATED BY

Lori Sheldt on 10/29/23 3:55 am

ORDER REASON

WORK ORDER

6890662

QTY

1

SERVICE CODE

42 Yard Compactor Service

EQUIPMENT

42YD-CP

WORK TYPE

RO_DUMPRET

ORDER TYPE

Scheduled Service

ORDER NOTES

PO NUMBER

EXTERNAL ID

SCHEDULED DATE

12/13/23 Wednesday

ROUTE

HOU 302

SEQUENCE

15

DESTINATION / ORIGIN

WORK STATUS

Scheduled

EXCEPTION REASON

POSTING STATUS

Pending

Charges

Source Location

Disposal / Ship

Payments

Completion

Attachments

Labels

Composition

Photos

1

WEIGHT 5,000.00 lbs

FEEDBACK ★★★★★

DISPOSAL ARRIVAL 12/13/23 10:17 am to HOMEBASE

SERVICES LIST

Completion Data Select Print Format SET POSTING EDIT PRINT COMPLETED Search

	ROUTE	SEQ	LOCATION	WO TYPE	QTY	PHOTOS	WEIGHT	REVENUE	DISPOSAL COST	OPERATION COST	PROFIT	MINUTES	DISTANCE
<input type="checkbox"/>	HOU 302	15	44766001 PTC BUILDING 1000 (10T) 11200 Broadway St, Houston	Scheduled Service	1	2	5,000.00 lbs						
<input type="checkbox"/>	HOU 302	1082	44928001 * Cole's Flea Market 8100 Washington Ave, Houston	Scheduled Service	1		0.00						
<input type="checkbox"/>	HOU 302	1083	44928001 * Cole's Flea Market 8100 Washington Ave, Ho	Scheduled Service	1		0.00						
<input type="checkbox"/>	HOU 302	1084	44928001 * Cole's Flea Market 8100 Washington Ave, Ho	Scheduled Service	1								

CUSTOMER ANALYSIS & REPORTS

TYPE Work Order Weights SITE 44766001 - RWS Facility Services (3 Dickinson Drive Brandywin Search

WORK ORDER #	DATE	ROUTE	TRUCK	DRIVER	TIMESTAMP	WEIGHT	MANUAL WEIGHT
6890662	12/12/2023	HOU 302		Alicia Bias	10/11/2023 5:54 pm	5000.0000 lbs	Yes

Pathway: Load Account > Select Work Order; Operations > Dispatch

Accounting

AR Payment Batch - Display Changes and Option to 'Change Account' on a Non-Posted Batch (16023, 16006) [Enhancement]

The following enhancements have been applied to the AR Payment Batch screen:

1. The 'Bank Cleared Date' column has been relocated to display next to the 'Date' column.
2. A "Change Account" option (available by right clicking within the row of the account) has been added to the Batch Details screen. After reviewing LockBox uploads, if the payment record is found to be associated with the wrong account, it can be quickly corrected using this method.

AR PAYMENT BATCH ACCOUNTING > AR PAYMENT BATCH

PERIOD: Nov 2023 DIVISION: All BANK ACCOUNT: All

Open 3 \$ 20,800.00 Voided 1 \$ 0.00 Posted 10 \$ 3,038,225.12

BATCH # **DIVISION** **TYPE** **IS MERCHANT** **STATUS** **DATE** **BANK ACCOUNT** **COUNT** **TOTAL** **CREATED ON** **GL BATCH**

11107	HOUSTON	Payment		Open	11/10/23	BANK OF NAVU	1	\$ 20,000.00	11/10/23 1:04 pm	
11112	DAYTON	Payment		Open	11/14/23	COMERICA - FWS	1	\$ 500.00	11/14/23 11:29 am	
11113	HOUSTON	Payment		Open	11/14/23	TBD	2	\$ 300.00	11/14/23 6:02 pm	
11105	HOUSTON	Payment	Pineapple Scheduled Auto Pay	Posted	11/5/23	COMERICA - FWS	1	\$ 0.00	11/5/23 3:17 pm	
11106	HOUSTON								11/6/23 4:01 pm	
11109	DAYTON								11/10/23 3:28 pm	
11110	HOUSTON								11/10/23 3:28 pm	
11111	DAYTON								11/13/23 6:02 pm	
11115	HOUSTON								11/15/23 10:45 am	
11116	CORPUS								11/15/23 3:29 pm	
11117	HOUSTON								11/15/23 3:29 pm	
11118	DAYTON								11/16/23 3:12 pm	
11119	HOUSTON								11/16/23 4:10 pm	
11114	HOUSTON								11/15/23 10:41 am	

BATCH - 11113 DIVISION - HOUSTON

DATE: 11/14/2023 BANK ACCOUNT: TBD AMOUNT: \$ 300.00 COUNT: 2 STATUS: Open

NOTE: NAVU-16006 Test CREATED BY: Paul Gonzalez - 11/14/2023 6:02 pm 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
43850	Active	\$ 315.67	SILVER PE...	3695		
43259	Active	\$ 485.78	SALVATIO...	2531		

Change Account

POST PRINT REPORT VOID IMPORT

Pathway: Accounting > AR Payment Batch

Articles: AR Payment Batch

Autopay Management - 'Day of Month' Added to Export File View (16033)[Enhancement]

The Export file from the Autopay Management screen has been corrected to include the 'Day of Month' column.

	A	B	C	D	E	F	G	H	I	J	K	L
1	Type	Last Paymen	Account Id	Account Nam	Current	30-Jan	31-60	61-90	91-120	120+	Total	Day Of Month
2	Visa (5555)E	12/01/23 \$9	44151	Arnold High	0	0	0	0	0	93.82	93.82	1st
3	Visa (5555)Exp:	10/25	48359	Arnold Smith	-7.12	0	0	0	0	0	-7.12	1st
4	Mastercard (	09/03/23 \$6	46103	MORGAN	0	0	0	0	0	61.44	61.44	2nd
5	Bank Accoun	12/03/23 \$9	32326	Marisa Jones	0	0	0	0	0	93.38	93.38	3rd
6	Mastercard (	12/03/23 \$2	33428	Henry Jones	0	0	0	0	0	228.97	228.97	3rd
7	Bank Accoun	12/05/23 \$7	31936	PENNY WISE	0	0	0	0	0	79.94	79.94	5th
8	Mastercard (	12/05/23 \$9	45901	RILEY SMITH	0	0	0	0	0	93.38	93.38	5th
9	Visa (1111)Exp:	08/24	45837	Shirley Temp	0	0	0	0	0	91.25	91.25	5th
10	Mastercard (	10/24/22 \$1	48567	PATRICIA PA	-39.32	0	0	0	0	0	-39.32	5th
11	Mastercard (	10/07/22 \$0	46934	Gil Jones	0	0	0	0	0	93.38	93.38	6th
12	Visa (9999)Exp:	04/24	48337	Jennifer Mcd	-20.72	0	0	0	0	0	-20.72	6th
13	Mastercard (	10/09/22 \$1	32107	Wayne Smith	0	0	0	0	0	75.36	75.36	8th
14	Bank Account (5555)		32963	Ellen Jones	0	0	0	0	0	92.94	92.94	8th

Pathway: Accounting > Autopay Management

Payment Batch Listing - Excludes Payment Batches With a Null Posted Time Stamp (16086)

The discrepancy between the total amount in the Payment Batch Listing and other AR analysis tools has been resolved. Previously, if a payment batch did not have a posted timestamp, it was excluded from the total calculation in the Payment Batch Listing, leading to the discrepancy.

Pathway: Accounting > AR Payment Batch

Billing Batch - Tooltip Added to 'Autopay Enrolled Column' (16178)[Enhancement]

The Billing Batch screen's Auto Pay Enrolled column has been enhanced to display details of the values listed in the column with a tool tip. Hover over the value and the details will be displayed.

Operations

Route Management - Navusoft File Format Export Option Updated (15938)[Enhancement]

The following columns have been added to the Navusoft File Format export:

- Location Postal Code
- Location Full Postal Code
- Location Phone
- Business Hours
- Service Days
- Service Day Hours
- Service Code
- Service Code Name
- Equipment Type
- Equipment Type Name
- Material Type
- Material Type Name
- Line of Business
- Bin Size
- Estimated Service Time
- Estimated Volume
- Frequency
- Schedule Started
- Next Service Date
- Next Service Week
- A/B Week
- Week of Month

The following columns have been removed:

- Service Code - previously, this column included the service code, equipment type and material combined together. This column will now exist as its own data set.
- Frequency/Next Service - previously, these two data sets displayed together in the same column. These columns now exist separately.

	G	H	I	J	K	L	M	N	O	P	Q	R	S
1	Location Star	Location Postal	Location Full Postal	Location Phone	Business Hours	Service Days	Service Day Hours	Qty	Service Code	Service Code	Equipment T	Equipment T	Material Typ
2	TX	77056	77056-4401	(555) 555-3346		H			1	CP30T	30 Yard Com	30YD-CP	30 Yard Compactor
3	TX	77584	77584	(555) 555-2182		M			1	CP35T	35 Yard Com	35YD-CP	35 Yard Compactor
4	TX	77581	77581-2208	(555) 555-2277	Weekdays 6:00 AM to 9:30	W	6:00 AM to 9:30 AM		1	RO30T	30 Yard Opei	30YD	30 Yard Roll Off
5	TX	77581	77581-2208	(555) 555-2277	Weekdays 6:00 AM to 9:30	W	6:00 AM to 9:30 AM		1	RO30T	30 Yard Opei	30YD	30 Yard Roll Off
6	TX	77584	77584-9785	(555) 555-0088		W			1	CP42T	42 Yard Com	42YD-CP	42 Yard Receiver (Ser)
7	TX	77581	77581-2208	(555) 555-2277	Weekdays 6:00 AM to 9:30	W	6:00 AM to 9:30 AM		1	RO30T	30 Yard Opei	30YD	30 Yard Roll Off
8	TX	77584	77584-1895	(555) 555-7839		T,F			1	CP30T	30 Yard Com	30YD-CP	30 Yard Compactor
9	TX	77584	77584-1895	(555) 555-7839		T,F			1	CP30T	30 Yard Com	30YD-CP	30 Yard Compactor
10	TX	77584	77584-1609	(555) 555-8308		H			2	RO40RT	40 Yard Rece	40YD-CP	40 Yard Receiver
11	TX	77581	77581-3405	(555) 555-1900		W			1	RO40T	40 Yard Opei	40YD-RO	40 Yard Roll Off
12	TX	77581	77581	(555) 555-0000		W			1	RO30T	30 Yard Opei	30YD	30 Yard Roll Off
13	TX	77584	77584-8853	(555) 555-5777		W			1	CP30T	30 Yard Com	30YD-CP	30 Yard Compactor
14	TX	77584	77584-6023	(555) 555-8483	Weekdays 7:00 AM to 6:00	T	7:00 AM to 6:00 PM		1	RO30T	30 Yard Opei	30YD	30 Yard Roll Off
15	TX	77581	77581-2308	(555) 555-9035		T			1	RO40T	40 Yard Opei	40YD-RO	40 Yard Roll Off
16	TX	77581	77581-7677	(555) 555-3500		M (A Week)			1	RO40T	40 Yard Opei	40YD-RO	40 Yard Roll Off
17	TX	77584	77584-1359	(555) 555-2400	Weekdays 12:00 PM to 2:00	F (A Week)	12:00 PM to 2:00 PM		1	CP30T	30 Yard Com	30YD-CP	30 Yard Compactor
18	TX	77584	77584-2154	(555) 555-2400		F (A Week)			1	CP30T	30 Yard Com	30YD-CP	30 Yard Compactor
19	TX	77584	77584-7347	(555) 555-2345		M,H			1	CP30T	30 Yard Com	30YD-CP	30 Yard Compactor
20	TX	77584	77584-7347	(555) 555-2345		M,H			1	CP30T	30 Yard Com	30YD-CP	30 Yard Compactor
21	TX	77584	77584-4158	(555) 555-2795		W			1	CP40T	40 Yard Com	40YD-CP	40 Yard Receiver
22	TX	77584	77584-7286	(555) 555-1893		H (A Week)			1	RO40RT	40 Yard Rece	40YD-CP	40 Yard Receiver
23	TX	77581	77581	(555) 555-3100		F			1	CP30T	30 Yard Com	30YD-CP	30 Yard Compactor
24	TX	77581	77581-3405	(555) 555-1900		W			1	RO40T	40 Yard Opei	40YD-RO	40 Yard Roll Off

Route Management - New Fields Added to Navusoft Export File (15969)[Enhancement]

Two new fields, "Location Latitude" and "Location Longitude" have been added to the Navusoft File Formart export.

	A	B	I	J	K	L	M	N	O	P
1	Record Id	Location Id	Location Full Postal Code	Location Phone	Location Latitude	Location Longitude	Business Hox	Service Days	Service Day I	Qty
2	292575	46198076	77047-4211	(346) 773-6954	29.614	-95.3997		W		1
3	292576	46198077	77053-4820	(281) 236-0570	29.5852	-95.4441		W		1
4	298171	43890002	77584-7458	(281) 652-1604	29.581074	-95.42114		W		1
5	299473	47066001	77047-2832	(888) 871-7623	29.62831	-95.3914		W		1
6	308160	47995001	77583	(346) 347-6432	29.540602	-95.39839		W		1
7	309701	48246001	77584	(713) 340-2300	29.5762	-95.403		M,W,F,S		6
8	309702	48246001	77584	(713) 340-2300	29.5762	-95.403		M,W,F,S		6
9	309794	43383001	77584	(713) 623-6944	29.567446	-95.38786		M,T,W,H,F,S		2
10	309796	43383001	77584	(713) 623-6944	29.567446	-95.38786		M,T,W,H,F,S		2
11	309945	46209001	77584		29.577	-95.4195		W,F		4
12	309946	46209001	77584		29.577	-95.4195		W,F		4
13	310007	43473001	77584-7297	(281) 245-3210	29.578632	-95.397064		M,T,W,H,F		2
14	310011	43473001	77584-7297	(281) 245-3210	29.578632	-95.397064		M,T,W,H,F		2
15	310016	43473007	77584	(832) 294-7770	29.556746	-95.41992		M,T,W,H,F		2
16	310194	45392001	77584-7298	(877) 792-7838	29.5817	-95.3978		M,T,W,H,F,S		1
17	310196	45392001	77584-7298	(877) 792-7838	29.5817	-95.3978		M,T,W,H,F,S		1
18	310306	43473005	77584-3930	(281) 652-1603	29.560856	-95.41866		M,T,W,H,F		1
19	310311	43473006	77584	(281) 245-3226	29.556719	-95.40846		M,T,W,H,F		1
20	310316	43473003	77584-5701	(281) 245-3243	29.57637	-95.3969		M,T,W,H,F		1
21	310321	43473004	77584-3750	(281) 388-1130	29.571474	-95.41694		M,T,W,H,F		1
22	310449	43178057	77584-2189	(888) 437-4494	29.557129	-95.394775		M,H,F,S		1
23	310587	46127001	77584-3779	(713) 363-8020	29.5562	-95.3987		M,W,F		1
24	310588	46127001	77584-3779	(713) 363-8020	29.5562	-95.3987		M,W,F		1
25	310645	43615001	77584-2474	(770) 720-0088	29.55517	-95.39294		M,W,F		1
26	310646	43615001	77584-2474	(770) 720-0088	29.55517	-95.39294		M,W,F		1
27	310683	43270001	77047-2589	(832) 710-4728	29.588451	-95.40355		M,W,F		1
28	310684	43270001	77047-2589	(832) 710-4728	29.588451	-95.40355		M,W,F		1
29	310853	43204001	77584-3376	(713) 340-3140	29.554907	-95.39766		M,W,F		1
30	310854	43204001	77584-3376	(713) 340-3140	29.554907	-95.39766		M,W,F		1

Pathway: Operations > Route Management > Current (Tab) > Export (Navusoft File Format)

Route Management - New Sequence Numbers Not Applied Upon Import (15932)

An issue has been resolved that was preventing new sequence numbers from being imported back into Route Management. In addition, the following improvements have been made:

- The logic for CSV header handling in the import file has been enhanced to support case insensitivity.
- While the import is running, the user will not be able to use the Current tab in Route Management.

Pending

Current

Re-Number

HOUSTON

HOUSTON OPEN MARKET

Roll Off

HOU 301, HOU 302, 1

Wednesday

LOAD

EXPORT

IMPORT

Standard

EDIT

MAP

Route Summary

SERVICE CODE FILTER

Search

LOCATION	QTY	SERVICE CODE	FREQ / NEXT SVC	ROUTE	SEQ	DOW	NEW ROUTE	NEW SEQ	NEW START DATE	NEW WEEK
----------	-----	--------------	-----------------	-------	-----	-----	-----------	---------	----------------	----------

Pathway: Operations > Route Management > Current (tab)

Route Management - Route Count Added To Pending Tab (16136)[Enhancement]

An enhancement has been made to the Pending tab in the Route Management screen to display a Count at the top of the screen.

Pending	Current	Re-Number						
HOUSTON	HOUSTON OPEN MARKET, LOS A	Commercial, Landfill, R	Monday, Tuesday, Wed	LOAD				
					COUNT 71	Search		
LOCATION	ADDRESS	QTY	SERVICE CODE	FREQUENCY	START DATE	NEW ROUTE	SEQUENCE	WEEK OF MONTH
43890007 COP - PUBLIC WORKS SERVI...	2010 OLD ALVIN RD PEARLAND, TX 77581-...	1	3 Yard Trash Serv... 3 Yard FL MSW	3x per week M,W,F	Mon 11/06/23 Week 46 (B)		34	Post
43520001 GARTNER COATINGS	2433 MAX RD PEARLAND, TX 77581-...	1	40 Yard Open To... 40 Yard Roll Off	Every 14 days S	Sat 09/16/23 Week 38 (B)		111	Post
46600001 WESTSIDE SC PEARLAND LTD	5040 BROADWAY PEARLAND, TX 77581	1	4 Yard Trash Serv... 4 Yard FL MSW	4x per week M,W,F,S	Mon 11/06/23 Week 46 (B)		32	Post
46600001 WESTSIDE SC PEARLAND LTD	5040 BROADWAY PEARLAND, TX 77581	1	8 Yard Trash Serv... 8 Yard FL MSW	6x per week M,T,W,H,F,S	Mon 11/06/23 Week 46 (B)		33	Post
47494001 Larkspur at Shadow Creek	12635 Shadow Creek P... Pearland, TX 77584	1	35 Yard Compact... 35 Yard Compactor	1x per week S	Sat 09/16/23 Week 38 (B)		101	Post
47649001 TORRES COLLISION CENTER	11915 Almeda-Genoa ... Houston, TX 77034-4527	1	8 Yard Trash Serv... 8 Yard FL MSW	1x per week F	Fri 08/19/22 Week 34 (B)		0	Post
43473007 ALVIN ISD JR HIGH 7-MCNAL...	2950 KINGSLEY PEARLAND, TX 77584	2	6 Yard Trash Serv... 6 Yard FL	5x per week M,T,W,H,F	Mon 10/30/23 Week 45 (A)		52	Post

Pathway: Operations > Route Management

Route Management (Pending) - Upon "Post" Screen Continues to Display as "Updating" (16172)

Previously, in the Route Management Pending tab, when a new route was set and the 'Post' button was clicked, the route would post successfully, but the screen would persistently show "updating." This has been resolved.

Pending	Current	Re-Number						
CORPUS	CORPUS OPEN MARKET	Roll Off	Monday, Tuesday, Wed	LOAD				
					COUNT 7	Search		
LOCATION	ADDRESS	QTY	SERVICE CODE	FREQUENCY	START DATE	NEW ROUTE	SEQUENCE	WEEK OF MONTH
43028001 ARROW DISPLAY SIGNS	kjhl Corpus, PA 78404-3121	1	10 Yard Open Top Service 10 Yard Roll Off	1x per week H	Thu 04/27/23 Week 18 (B)	COR 301	0	Post
41273001 VERTEX ROOFING	1234 Ninterstate 35 Denton, TX 76210	1	10 Yard Open Top Service 10 Yard Roll Off	1x per week F	Fri 04/28/23 Week 18 (B)	COR 302	0	Post
41389001 HUBER CUSTOM HOMES	1111 RIDGE RD ROCKPORT, TX 78382	1	10 Yard Open Top Service 10 Yard Roll Off	1x per week F	Fri 04/28/23 Week 18 (B)		0	Post
45847021 AMIGO OFF ROAD	2222 Cascade Rd unit E5 Corpus Christi, TX 78417-9760	1	10 Yard Open Top Service 10 Yard Roll Off	1x per week W	Wed 06/21/23 Week 26 (B)		0	Post
32404001 GOODWILL	3333 E PORT AVE CORPUS CHRISTI, TX 78405	1	15 Yard Open Top Service 15 Yard Roll Off	1x per week H	Thu 08/17/23 Week 34 (B)		0	Post
32016001 THOMAS KENNETH	4444 BALDWIN LAKE CITY, TX 78368-9223	1	15 Yard Open Top Service 15 Yard Roll Off	1x per week H	Thu 08/24/23 Week 35 (A)		0	Post
32016001 THOMAS KENNETH	4444 BALDWIN LAKE CITY, TX 78368-9223	1	10 Yard Open Top Service 10 Yard Roll Off	1x per week T	Tue 08/29/23 Week 36 (B)		0	Post

Pathway: Operations > Route Management

Active Dispatch - Count Tally Added to Unassigned Work Column (16122) [Enhancement]

The Unassigned Work column in the Active Dispatch screen has been updated to include a count tally in the banner.

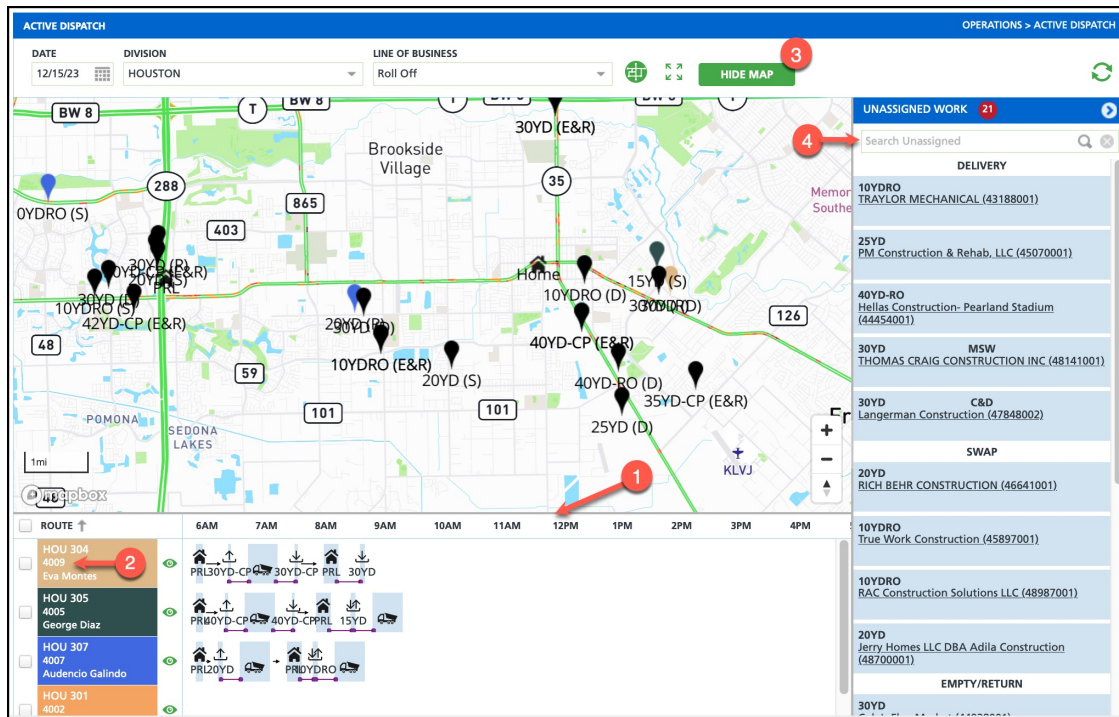
The screenshot shows the 'ACTIVE DISPATCH' screen. At the top, there's a header with 'OPERATIONS > ACTIVE DISPATCH'. Below it, a map of Houston is displayed. On the right side, there's a panel titled 'UNASSIGNED WORK 20'. This panel has a search bar labeled 'Search Unassigned' and a list of work items. The list is divided into two sections: 'DELIVERY' and 'SWAP'. Under 'DELIVERY', there are three items: '18YDRO TRAYLOR MECHANICAL (43188001)', '25YD PM Construction & Rehab, LLC (45070001)', and '40YD-RO Grains- Pearland Stadium (44454001)'. Under 'SWAP', there are two items: '20YD Grains BEHR CONSTRUCTION (46641001)' and '10YDRO Honest Construction Construction (45897001)'.

Pathway: Operations > Active Dispatch

Active Dispatch - Screen Updates (16077)[Enhancement]

The following screen improvements have been applied to the Active Dispatch screen:

1. User adjusted sizing of the split screen (Map vs Route List) will save when the user exits and re-enters Active Dispatch.
2. Truck name has been added to display below the route name in the Route List.
3. A new "Hide Map" button has been added. When selected, only the route and the Unassigned Work column display on the screen.
4. A Search field has been added to the Unassigned Work column.



Pathway: Operations > Active Dispatch

Dispatch - Unassigned Stops Are Grouped Together Regardless of the Line of Business (15987)

The issue of unassigned routes across different lines of business being grouped together in the Services List has been resolved.

DISPATCH

FROM

TO

DIVISION

LINE OF BUSINESS

11/06/23

11/06/23

CORPUS, DAYTON, HILLSBORO, HOUSTON, QAWASTE

Roll Off, Commercial

Standard

Select Route Sheet

Search

ROUTE

TRUCK

DRIVER

PRE TRIP

POST TRIP

OPTIMIZED

SCHEDULED

SERVICED

PENDING

DO NOT SERVICE

EXCEPTIONS

DISPOSAL

+ CORPUS - Commercial - Monday Nov 6, 2023 (0 of 5 Completed)

+ CORPUS - Roll Off - Monday Nov 6, 2023 (0 of 1 Completed)

+ DAYTON - Commercial - Monday Nov 6, 2023 (0 of 5 Completed)

+ DAYTON - Roll Off - Monday Nov 6, 2023 (0 of 3 Completed)

- HOUSTON - Commercial - Monday Nov 6, 2023 (0 of 7 Completed)

<

Pathway: *Operations > Dispatch*

Dispatch - Screen Grouping Logic Updated (15990)[Enhancement]

The Dispatch screen has been updated to group routes by Division, Line of Business and Date.

DISPATCH

FROM01/17/23TO01/18/23DIVISIONHOUSTONLINE OF BUSINESSCommercial, Roll Off, ResidentialLOAD

StandardSelect Route SheetSearch

ROUTE

TRUCK

DRIVER

PRIE TRIP

POST TRIP

OPTIMIZED

SCHEDULED

SERVICED

PENDING

DO NOT SERVICE

EXCEPTIONS

DISPOSAL

Pathway: *Operations > Dispatch*

Dispatch - Vehicle Inspections Failing to Post if Driver Note is Too Long (15944)

The Notes field on the Vehicle Inspection Results screen has been enhanced to accommodate 500 characters, resolving the issue where vehicle inspections were not being posted when drivers entered lengthy notes.

TRUCK 2003 - 11/14/2023 VEHICLE INSPECTION RESULTS			
INSPECTION ITEM ↑	PRE TRIP RESULT	POST TRIP RESULT	NOTES
Backup Camera Functional	Fail		
Instruments and Gauges	Pass		
License Plate(s) and Registration	Pass		
Lights and Reflectors	Pass		
Tires, Wheels, and Rims	Fail (Flat, Loose Lug ...)		I am going to type a very long note to test t
Vehicle Damage	Fail (PTO Leaks, Hoi		I am going to type a very long note to test the 500 character limit. it's going to take a very long note in order to get to the 500 character limit. I am also trying not to accidentally click below the space bar since it will close the note screen without saving the long note that it took me over 5 minutes to type. I am typing really slow. I still need about 200 characters. it looks like the 500 character limit is going to work. I am getting close. 50 characters to go and I'm very careful not to
Windshield Wipers	Pass		

PRE TRIP	Test2 Dispatcher User	11/14/2023 9:50 am
POST TRIP		

ORDER ID	TYPE	SOURCE	TARGET DATE	STATUS	ASSIGNED TO	NOTES

Pathway: *Operations > Dispatch*

Dispatch - Division Selection Now Allows Selection of Division Groups (15947)[Enhancement]

An enhancement has been made within the Division drop down selection to include the selection of Division Groups. When a group is available, the group name is displayed in bold, and the divisions within the group are indented with dashes.

DISPATCH		DIVISION	LINE OF BUSINESS
FROM 12/08/23	TO 12/08/23	DAYTON, QAWASTE, Example	Commercial, Document Destruction
Standard		<input type="checkbox"/> All <input checked="" type="checkbox"/> Example ← Group Name <input checked="" type="checkbox"/> -- DAYTON <input checked="" type="checkbox"/> -- QAWASTE	
ROUTE ↑		<input type="checkbox"/> CORPUS <input type="checkbox"/> HILLSBORO <input type="checkbox"/> HOUSTON	
+ CORPUS - Commercial - Friday Dec 8, 2023 (0 of 1 Completed)			
+ CORPUS - Residential - Friday Dec 8, 2023 (0 of 6 Completed)			
+ CORPUS - Roll Off - Friday Dec 8, 2023 (0 of 1 Completed)			
+ DAYTON - Commercial - Friday Dec 8, 2023 (0 of 6 Completed)			
+ DAYTON - Residential - Friday Dec 8, 2023 (0 of 15 Completed)			

Pathway: *Operations > Dispatch*

Dispatch - Map Routes Button Not Loading Stops With NULL Route ID (16088, 16089)

Previously, if the route ID was null (blank) in Dispatch, the following issues occurred:

1. The Map Route button did not load stops that didn't have a route assigned to them. This has been fixed.
2. In the Weekly by Route view, clicking on the count to open the Services List did not return any stop records for null/blank routes. This has been fixed.

DISPATCH

OPERATIONS > DISPATCH

FROM

TO

DIVISION

LINE OF BUSINESS

12/08/23

12/08/23

CORPUS, DAYTON, HEARNE, HILLSBORO, HOUSTON

Landfill, Roll Off, Commercial, Document Destruction, Ha

Standard

Select Route Sheet

Search

ROUTE

TRUCK

DRIVER

PRE TRIP

POST TRIP

OPTIMIZED

SCHEDULED

SERVICED

PENDING

DO NOT SERVICE

EXCEPTIONS

DISPOSAL

CORPUS - Commercial - Friday Dec 8, 2023 (0 of 6 Completed)

Pathway: *Operations > Dispatch*

Work Type - New Field Added (15958)[Enhancement]

A new "Self-Service Label" field has been added to the Add and Edit Work Type Setup screen. Field entry is optional and is related to self service ordering allowing users to apply a specific label for site service actions. If a label is not entered (field is empty/null) the work type's name is used.

WORK TYPE SETUP			
ID	NAME	LOB	ACTION CATEGORY
DDSV			
DEL_HAZ			
DUMPONLY			
FL_DELIVER			
FL_EXCHANGE			
FL_EXTRAPU			
FL_MISSED			
FL_MOVE			
FL_RELOCAT			
FL_REMOVE			
FL_REPAIR			
FL_SERVICE			
INBOUNDLD			
new1			
ONCALL_HAZ			
REM_HAZ			
RETURNBOX			
RMW_DEL			
RMW_FINAL			
RMW_ONCALL			
RMW_Setup			
RMW_SVC			
RMW_XTRAPU			
RO_DELIVER			

ADD WORK TYPE	
Details	NavuNav Settings
ID	
NAME	
LINE OF BUSINESS	
INVENTORY MOVE TYPE	None
ACTION CATEGORY	
MANIFEST NOTIFICATION TEMPLATE	
CREATE ONE SERVICE RECORD PER QUANTITY	No
ENABLE DISPOSAL OR MATERIAL ENTRY	None
ENABLE CONSOLIDATION BATCH LINK	No
(INBOUND) REQUIRE SOURCE LOCATION	No
PRODUCTIVITY UNITS	1.00
SELF-SERVICE LABEL	
DESTRUCTION DATE TRACKING	Disabled
Route Optimization	
ORDER BASELINE SECONDS	
DEFAULT SECONDS PER UNIT	

INVENTORY MOVE TYPE	MANIFEST NOTIFICATION TEMPLATE
None	
None	
None	
Delivery	
Exchange	
None	
None	
None	
Removal	
None	
None	Service Report-Work Order @...
None	
None	
None	
None	
None	Service Report-Manifest @@w...
None	Service Report-Manifest @@w...
None	Service Report-Manifest @@w...
None	Service Report-Manifest @@w...
None	Service Report-Manifest @@w...
None	Service Report-Manifest @@w...
Delivery	

Pathway: *Setup > Operations > Work Type*

Inbound/Outbound (Operations) - Edit Disposal/Shipment Screen Includes Internal Ticket Number

(16103) [Enhancement]

A change has been made to Edit/Disposal Shipment to display the Internal Ticket number at the top of the screen.

EDIT DISPOSAL / SHIPMENT

WO Disposal - 6271559

INTERNAL TICKET# 41016

START DATE	START TIME	END DATE	END TIME	DESTINATION / ORIGIN	TANK				
08/10/23 Thu	10:19 AM			HOMEBASE					
TRANSPORT METHOD	TRUCK	VEHICLE INFO/ LICENSE PLATE		EXTERNAL TICKET #	STATUS				
Truck					In Progress				
MATERIAL	GROSS WEIGHT	TARE/OUT WEIGHT	UOM	QTY	MIN QTY	DISPOSAL RATE	FEE 1	FEE 2	TOTAL COST
MSW			pound	13500					
NOTES									

Ticket Image

+

☐ Include Ticket Image With Invoice and make available in customer portal

SAVE

Pathway: *Operations > Inbound/Outbound > Select Service Record*

Reports

Revenue Analysis (Analysis Reports) - Logic Updated to Service Region Filter (15915)

Logic to Service Region has been updated to default to 'All' when the Division is changed.

REVENUE ANALYSIS

REPORTS > ANALYSIS > REVENUE ANALYSIS

TYPE

Billed by Account Class

YEAR

2023

DIVISION

HOUSTON

SERVICE REGION

All

LOAD

Search

Pathway: Reports > Analysis > Revenue Analysis

Analysis Reports - Sales Results Net New (16034)

Previously, if a site name included special characters, the exported document would exclude all data for the month the site was included in. This issue has been addressed to accommodate sites with special characters.

SALES RESULTS NET NEW									
REPORTS > ANALYSIS > SALES RESULTS NET NEW									
TYPE	Period	Oct 2023	DIVISION	All	LINE OF BUSINESS	All		SALES RESULT DETAILS	
GROUP BY	Sales Rep								
	NEW	INCREASES	GROSS TOTAL	CONTROLLABLE	NON-CONTROLL...	DECREASES	NET TOTAL	TEMP / SEASONAL	1085
	\$ 0.00 1 (1 Sites)	\$ 0.00 0 (0 Sites)	\$ 0.00	\$ 0.00 0	\$ 0.00 1	\$ 0.00 0 (0 Sites)	\$ 0.00	\$ 0.00 0 (0 Sites)	N/A
<u>Aliena Somers</u>	\$ 0.00 1 (1 Sites)	\$ 0.00 0 (0 Sites)	\$ 0.00	\$ 0.00 0	\$ 0.00 0	\$ 0.00 0 (0 Sites)	\$ 0.00	\$ 65.00 1 (1 Sites)	N/A
<u>House Account</u>	\$ 480.00 7 (6 Sites)	\$ 56.00 4 (4 Sites)	\$ 536.00	\$ 0.00 0	\$ 0.00 0	\$ 366.24 7 (7 Sites)	\$ 902.24	\$ 0.00 0 (0 Sites)	4.935%
<u>House Acct non System</u>	\$ 285.89 7 (6 Sites)	\$ 580.19 1 (1 Sites)	\$ 866.08	\$ 0.00 0	\$ (2,188.20) 5	\$ 470.88 9 (9 Sites)	\$ (851.24)	\$ 0.00 0 (0 Sites)	151.9496%
<u>Rob Tellez</u>	\$ 0.00 0 (0 Sites)	\$ 730.20 4 (3 Sites)	\$ 730.20	\$ 0.00 0	\$ 0.00 0	\$ (126.50) 1 (1 Sites)	\$ 603.70	\$ 0.00 0 (0 Sites)	(-14.375%)
<u>Janet Bettcher</u>	\$ 65.00 1 (1 Sites)	\$ 0.00 0 (0 Sites)	\$ 65.00	\$ 0.00 0	\$ 0.00 0	\$ 52.32 1 (1 Sites)	\$ 117.32	\$ 0.00 0 (0 Sites)	N/A
Total	\$ 830.89 17	\$ 1,366.39 9	\$ 2,197.28 0%	\$ 0.00 0	\$ (2,188.20) 5	\$ 762.94 18	\$ 772.02 0%	\$ 65.00 1	57.7539%

Pathway: Reports > Analysis > Sales Results Net New

Sales

Sales Results Net New (Analysis) - Screen Enhancements (15875)

The following changes have been applied the the Sales Results Net New screen:

1. Filter labels have been relocated to display above the filter they are associated with.
2. A new 'Based On' filter has been added with 'Effective Date' and 'Posted Date' filter options.
3. The 'Type' filter has been renamed to 'Range,' and can now be filtered by Month and Year with the Period filter.
4. A 'Period' label has been added above the Period filter, and the former drop-down option was replaced with a calendar picker.

Additional changes:

1. In Setup > System > System Options > Sales (tab), the 'Results Based On' field has been removed.

SALES RESULTS NET NEW									
REPORTS > ANALYSIS > SALES RESULTS NET NEW									
RANGE	PERIOD	BASSED ON	DIVISION	LINE OF BUSINESS				SALES RESULT DETAILS	SALES RESULT
Period	Dec 2023	Effective Date	All	All					
GROUP BY	Sales Rep								
	NEW	INCREASES	GROSS TOTAL	CONTROLLABLE	NON-CONTROLLABLE	DECREASES	NET TOTAL	TEMP / SEASONAL	1085
<u>Ken Smith</u>	\$ 100.00 3 (2 Sites)	\$ 0.00 0 (0 Sites)	\$ 100.00	\$ 0.00 0	\$ 0.00 0	\$ 0.00 0 (0 Sites)	\$ 100.00	\$ 0.00 0 (0 Sites)	N/A
<u>Dana Pate</u>	\$ 0.00 1 (1 Sites)	\$ 0.00 0 (0 Sites)	\$ 0.00	\$ 0.00 0	\$ 0.00 0	\$ 0.00 0 (0 Sites)	\$ 0.00	\$ 0.00 0 (0 Sites)	N/A
<u>Dave Peters</u>	\$ 1,899.00 4 (3 Sites)	\$ 783.00 2 (2 Sites)	\$ 2,682.00	\$ 0.00 0	\$ 0.00 1	\$ 0.00 0 (0 Sites)	\$ 2,682.00	\$ 0.00 0 (0 Sites)	(-42.6096%)
<u>House Account</u>	\$ 0.00 1 (1 Sites)	\$ 0.00 0 (0 Sites)	\$ 0.00	\$ 0.00 0	\$ (230.20) 2	\$ 0.00 0 (0 Sites)	\$ (230.20)	\$ 0.00 0 (0 Sites)	0%
<u>Natalia Jones</u>	\$ 0.00 0 (0 Sites)	\$ 7.00 1 (1 Sites)	\$ 7.00	\$ 0.00 0	\$ 0.00 0	\$ 0.00 0 (0 Sites)	\$ 7.00	\$ 0.00 0 (0 Sites)	N/A
<u>Alice Watters</u>	\$ 0.00 0 (0 Sites)	\$ 10.00 2 (1 Sites)	\$ 10.00	\$ 0.00 0	\$ (200.00) 2	\$ 0.00 0 (0 Sites)	\$ (190.00)	\$ 0.00 0 (0 Sites)	3.5842%
<u>Jeff Johnson</u>	\$ 3,000.00 1 (1 Sites)	\$ 0.00 0 (0 Sites)	\$ 3,000.00	\$ 0.00 0	\$ 0.00 0	\$ 0.00 0 (0 Sites)	\$ 3,000.00	\$ 0.00 0 (0 Sites)	N/A

Setup

Services - NavuNav Available Charge Codes in Line Of Business and Charge Code Setup (15895) [Enhancement]

In the NavuNav Settings of a charge code, if 'Hide In NavuNav' is set to "Yes," the charge code **will not** display in the NavuNav Available Extra Charges section on the Line of Business Setup screen.

Charge Code Setting

UPDATE CHARGE CODE

Charge Code

Surcharges

Default for Work Types

Divisions

CHARGE CODE

RORENTDAY

NAME

Roll Off Daily Rental

DOT DESCRIPTION

LINE OF BUSINESS

Roll Off

EQUIPMENT TYPE

MATERIAL TYPE

RATE UOM

each

TAXABLE

Yes

CLASS

GL ACCOUNT

Service Income:Roll Off Service Income

TYPE

Service

WEIGHT CHARGE

No

ENABLE WASTE PROFILE

No

Accounts Payable Settings

IS AP TRANSACTION

No

RATE INDEX

THRESHOLD DIS. RATE

ENABLE THRESHOLD

No

ACTIVE

Yes

ENABLE NO CHARGE QUANTITY

No

ENABLE NEGATIVE AMOUNT

No

ENABLE MAX. WEIGHT CHARGE

No

UOM

ESTIMATED AVERAGE WEIGHT

ENABLE MANUAL CHARGE

No

ENABLE MINIMUM

No

ENABLE VENDOR

No

ENABLE EST. CHARGE QUANTITY

No

PRICING MODEL

None

BILL ZERO AMOUNT CHARGE

No

DEFAULT QUANTITY

0.00

NavuNav Settings

HIDE IN NAVUNAV

Yes

REQUIRE COLLECTION TEST

No

PRINT LABEL

No

Effect in Line of Business

LINE OF BUSINESS SETUP

SETUP > SERVICES > LINE OF BUSINESS

ID	NAME	SCREEN TYPE	ENABLE MANIFEST PROCESSING	GL SEGMENT	WORK ORDER MINIMUM CHARGE CODE	OVER MAX-WEIGHT CHARGE CODE	UNEARNED REVENUE GL ACCOUNT	ENABLE USED OIL COLLECTION	AUTO COMPLETE SECONDS	DAYS AVAILABLE TO DRIVER	RECEIPT HEADER TEXT	ACKNOWLEDG... TEXT	ACTIVE
DOCDEST	Document Destruc...	1	No					No	5	Today Only			Yes
FEL	Commercial	1	No	D100			Unearned Rev...	Yes	5	Yesterday...			Yes
HAZ	Hazardous Material	1	Yes					No	5	Today Only			Yes
LF	Landfill	1	No	80			Account Payab...	No	5	Yesterday...			Yes
MEDICAL	Medical Waste	1	Yes		Minimum Ser...	Over Weight ...		No	5	Yesterday...	Receipt head...	This is LOB ac...	Yes
MISC	Miscellaneous	1	No	D200			Unearned Rev...	No	5	Yesterday...			Yes
RESI	Residential	1	No	D200			Unearned Rev...	No	5	Yesterday...			Yes
RO	Roll Off	1	No	D300			Unearned Rev...	No	5	Today Only			Yes
SCALE	Scale	1	No					No	5	Today Only			Yes

1. site.division.logoURL
2. salesRep.photoURL

DOCUMENT FORMAT SETUP

SETUP > DOCUMENT FORMATS > FORMAT

Measurements are in points, with 72 points per inch. Page Size = Letter (612 x 792). Left-top of page = (X=0, Y=0).

FORM TYPE	DESCRIPTION	NUM OF PAGES	ACTIVE	EMAIL SIGNATURE LINK
Proposal	Proposal - Not Corpus	1	Active	Yes
Service Contract	Service Agreement - Not Corpus	2	Active	Yes
Services Change Form	Order Form - Not Corpus	1	Active	Yes
Proposal	Corpus Proposal	1	Active	Yes
Service Contract	Corpus Agreement	1	Active	Yes
Proposal	clone_Proposal - Not Corpus	1	Active	Yes
Service Contract	clone_Corpus Agreement	1	Active	Yes
Services Change Form	Order Form - No WO - Change Order Form	1	Active	Yes

Division

LOB

Images

Fields

Terms

Signatures

KEY PATH

All Key Paths

PAGE NO

URL

PAGE NUM	KEY PATH	PREFIX	X COORDINATE	Y COORDINATE	WIDTH	HEIGHT	PRINT IF ZERO	FORMAT	COLOR	FONT	SIZE	
1	site.division.logoUrl		0	0			Yes	Text	Black		12	+
1	salesRep.photoUrl		0	0			Yes	Text	Black		12	+

Pathway: Setup > Document Formats