

# Release Version 71 [Archive]

Last Modified on 04/09/2026 7:34 am PDT



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

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

Expand All Sections

Collapse All Sections

## 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.

SITE ID	START DATE	END DATE	GROSS QTY	NO CHARGE QTY	NAME	PO #	AMOUNT	SURCHARGES	TAXES	TOTAL
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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				

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
<b>Total</b>								<b>\$ 6,510.03</b>	<b>\$ 0.00</b>	<b>\$ 537.27</b>	<b>\$ 7,047.30</b>

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				

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			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)

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

## 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!**

Charges **2** Payments Completion Attachments Labels Photos

Charges must match Equipment  
 Charges must match Material

WO MINIMUM

**PRINT WORK ORDER LABELS** (dropdown menu)  
 4x6 Hazardous Waste Label - With Background  
 Format 1  
 Format 2  
 Format 3  
 Format 4  
 WO Labels-Universal

GROSS QTY	LABELS	NO CHARGE QTY	CHARGE QTY	UOM	CHARGE C
0	+	0	0	each	15 Gal Fla
0	+	0	0	each	5 Gal Fla

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.

888844  
 Site 43178002 - CVS  
 10908 - 7110  
 MAGNOLIA RD  
 PEARLAND, TX 77584

Account Balance Due  
**\$ 14,649.05**

Past Due  
**\$ 13,597.17**

Make a payment

[Login](#)

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

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

**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.

 <p>PO BOX 260310 legal addr 2 Corpus Christi, TX 78426 PHONE: [REDACTED] [REDACTED] <a href="https://navuqa-customerportal.navusoft.net/">https://navuqa-customerportal.navusoft.net/</a></p>	<p><b>INVOICE #</b> 228838 <b>AMOUNT</b> 144.12 <b>ACCOUNT #</b> 21198 <b>DATE</b> Nov 5, 2021 <b>QUICK PAY CODE</b> 2B1AD <b>DUE DATE</b> Nov 25, 2021</p>
	<p><b>SUPER 90 ADAM'S QUICK STOP</b> [REDACTED] RAYWOOD, TX 77582-0098</p>

For proper credit return this portion

<p>Site 21198001 - SUPER 90 ADAM'S QUICK STOP - 13768 HWY 90 RAYWOOD, TX 77582 - Continued...</p>						
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
					<b>Tax</b>	\$ 9.12
					<b>Site Total</b>	\$ 144.12

	<b>INVOICE TOTAL</b>	<b>\$ 144.12</b>
2021-11-08	eCheck 4500	40231313_AUTH NUM 24
		-144.12
	<b>INVOICE BALANCE</b>	<b>0.00</b>

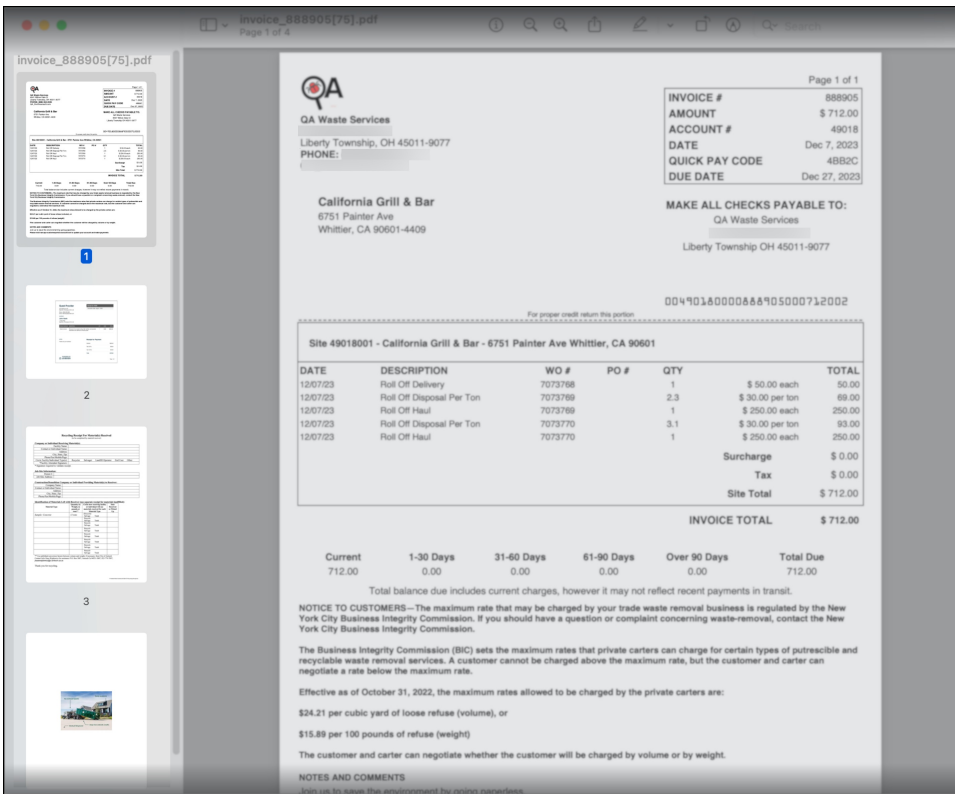
Current	1-30 Days	31-60 Days	61-90 Days	Over 90 Days	Total Due
144.12	0.00	0.00	0.00	0.00	144.12

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.



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

<p>NAME: <input type="text" value="Example Site 1"/></p> <p>NAME 2: <input type="text"/></p> <p>ADDRESS LINE 1: <input type="text" value="2222 Navu Cir"/></p> <p>ADDRESS LINE 2: <input type="text"/></p> <p>CITY/STATE/POSTAL CODE: <input type="text" value="Corpus Christi"/> <input type="text" value="TX"/> <input type="text" value="78411"/></p> <p>PHONE 1: <input type="text" value="(361) 854-7777"/> <input type="text" value="Office"/></p> <p>PHONE 2: <input type="text" value="(999) 999-9999"/> <input type="text"/></p> <p>OLD ID: <input type="text"/></p> <p>PO#: <input type="text" value="123456"/></p> <p>SIGNATURE REQUIRED: <input checked="" type="checkbox"/> LEED REPORTABLE: <input type="checkbox"/></p> <p>NOTE: <input type="text" value="delete"/></p> <p>WARNING ON OPEN: <input type="text"/></p> <p>ACCESS INFORMATION: <input type="text"/></p> <p>BUSINESS HOURS / SERVICE WINDOW: <input type="text" value="Weekdays"/> <input type="text" value="Open 6:00 AM Close 4:00 PM"/></p>	<p><b>DIVISION</b>: <span style="border: 2px solid red; padding: 2px;">CORPUS</span></p> <p>SERVICE REGION: <input type="text" value="CORPUS OPEN MARKET"/></p> <p>TAX REGION: <input type="text" value="NUECES COUNTY-CORPUS CHRIST"/></p> <p>ORIGIN: <input type="text"/></p> <p>SOURCE: <input type="text" value="Cold Call"/></p> <p>SALES REP: <input type="text" value="House Account (Invalid)"/></p> <p>SITE CLASS: <input type="text"/></p> <p>GENERATOR: <input type="text" value="Not Applicable"/></p> <p>EPA: <input type="text"/></p> <p>STATE ID: <input type="text"/></p> <p>ADDITIONAL SERVICE MINUTES: <input type="text"/></p>
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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.

1 of 3

FORMAT 1 - PAGE 1

FORMAT 1 - PAGE 2

FORMAT 1 - PAGE 3

SEND MESSAGE

SIGN & ACCEPT

SERVICE LOCATION MAP

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

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

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.


The screenshot shows the 'EDIT ACCOUNT' interface with the 'Settings' tab selected. The 'Billing' section contains several fields: '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), and 'CREDIT LIMIT' (160). The 'AP' section includes 'DEFAULT PAYMENT METHOD' (Not Applicable), 'PAYEE NAME', and a '1099' checkbox. The 'Settings' section has checkboxes for 'AUTO STATUS UPDATE' (checked), 'APPLY FINANCE CHARGES' (checked), 'EXCLUDE FROM PAYMENT PROCESSING FEE' (unchecked), 'EXCLUDE FROM PAST DUE NOTIFICATION' (checked), 'HIDE WORK ORDER FORMAT RATE' (unchecked), and 'INBOUND ORDER AUTO PRINT' (checked). A 'SAVE' button is located at the bottom center.

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.

 <p>1</p> <p>QA Waste Services PO BOX 260311 Houston, TX 78426</p> <p>Scale Test 8100 Washington Ave Houston, TX 77007</p>	<b>VEHICLE</b> BLUETRUCK	<b>SCALE TICKET</b> 40955
	<b>TRANSPORTER</b>	<b>DATE</b> May 2, 2023
	<b>PO #</b>	<b>SITE ID</b> 48921001
	<b>REQUESTED BY</b>	<b>TIME IN</b> 12:40 PM
	<b>NOTES</b> llkjlkjllkj	<b>TIME OUT</b>
	<b>MATERIAL</b> MSW	<b>WEIGHT IN</b> lbs
		<b>WEIGHT OUT</b> 2,300 lbs
		<b>NET</b> 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		
<b>Total Payment</b>		<b>\$ 212.00</b>		

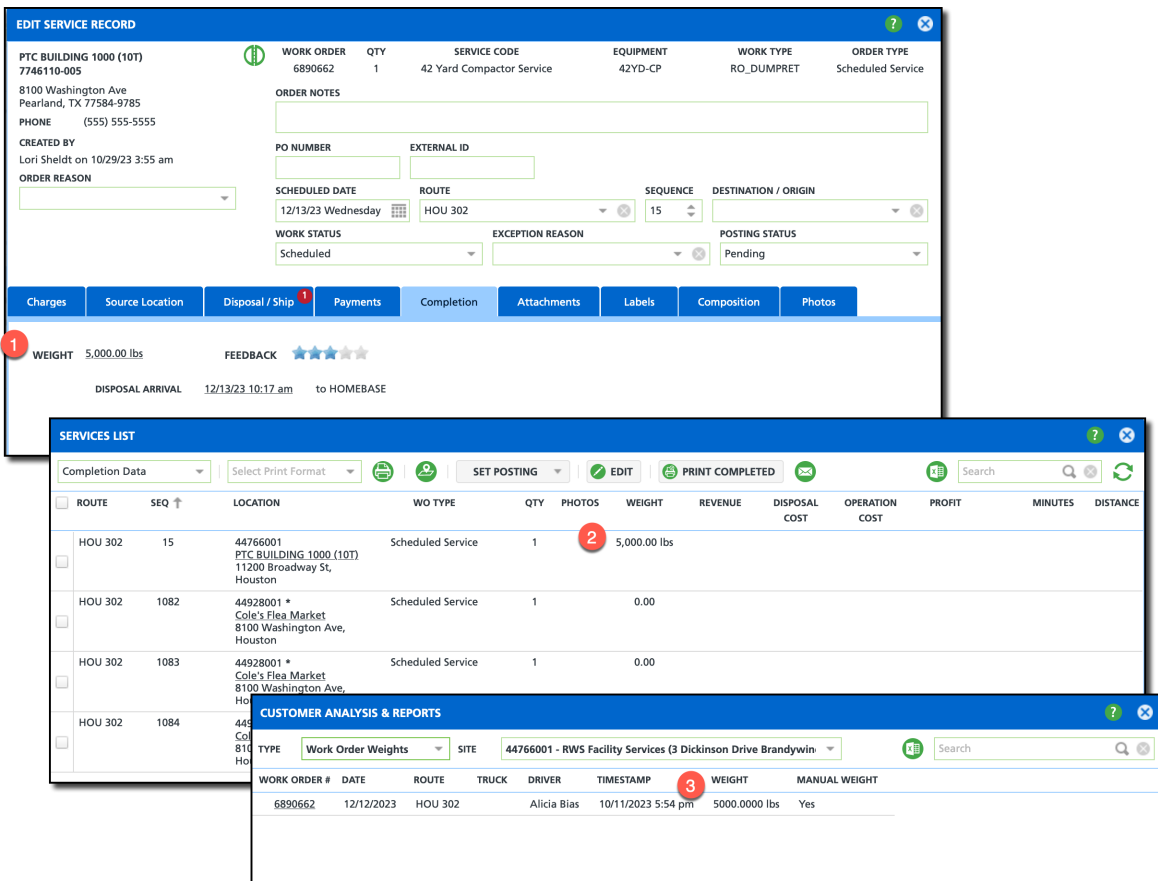
2	Driver Signature _____	3	Weighmaster Signature  _____
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Pathway: Accounts > Search > Accounts

## 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.



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.



# 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 Format export.

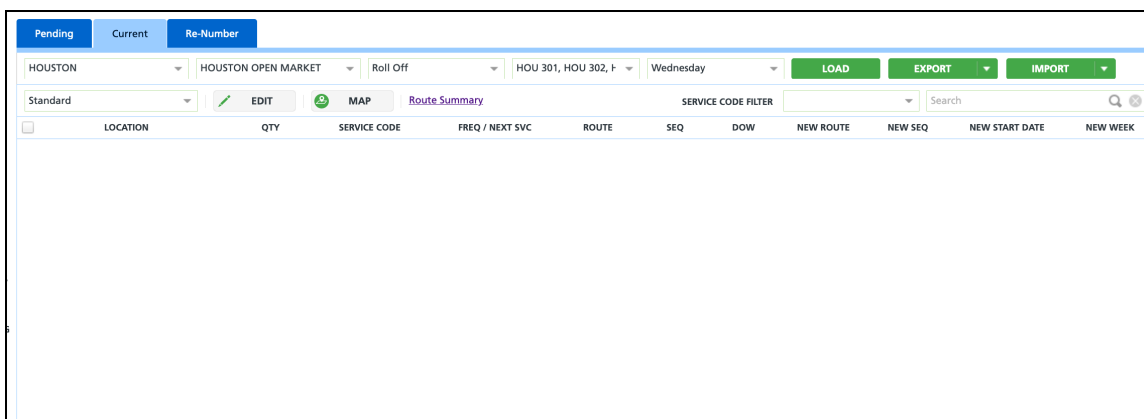
	A	B	I	J	K	L	M	N	O	P	
1	Record Id	Location Id	Location Full	Postal Code	Location Phone	Location Latitude	Location Longitude	Business Hox	Service Days	Service Day F	Qty
2	292575	46198076	77047-4211		(346) 773-6954	29.614	-95.3997		W		1
3	292576	46198077	77053-4820		(281) 236-0570	29.5852	-95.4441		W		1
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.



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 Alameda-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 EES 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.

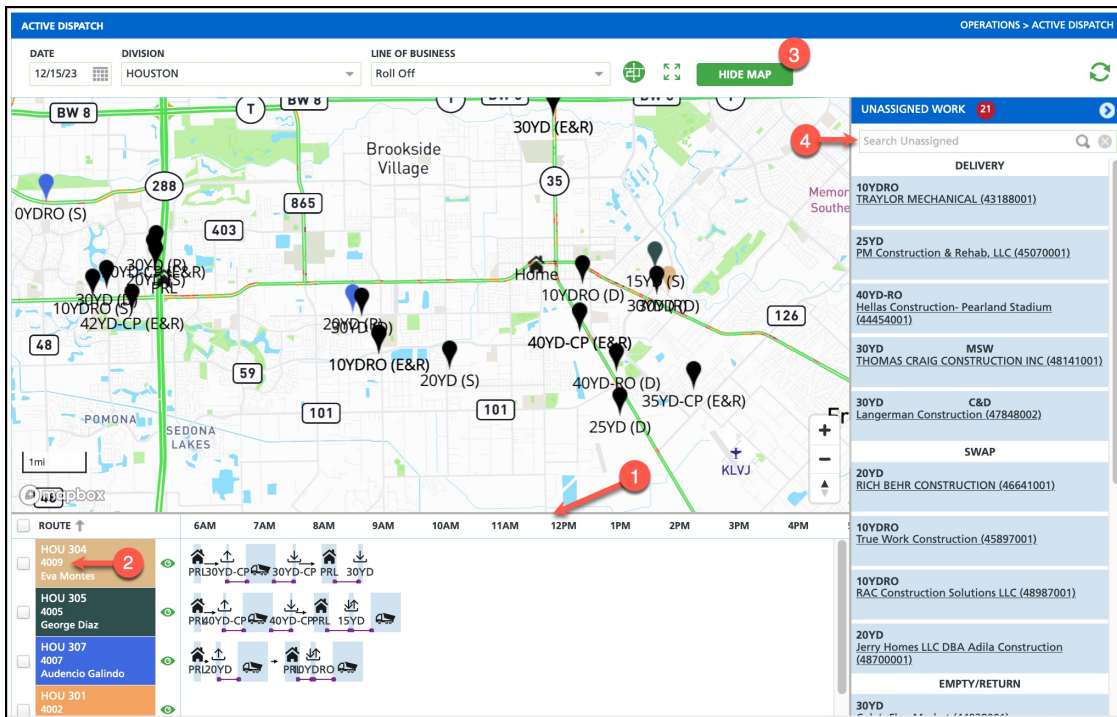
The screenshot shows the 'ACTIVE DISPATCH' interface. At the top, there are filters for DATE (12/18/23), DIVISION (HOUSTON), and LINE OF BUSINESS (Roll Off). A 'HIDE MAP' button is visible. The main area is a map of Houston with various locations marked. On the right side, there is a 'UNASSIGNED WORK' banner with a count of 20. Below the banner is a search bar and a list of unassigned work items, including delivery and swap tasks.

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 OPERATIONS > DISPATCH

FROM: 11/06/23 TO: 11/06/23 DIVISION: CORPUS, DAYTON, HILLSBORO, HOUSTON, QAWASTE LINE OF BUSINESS: 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)											
						3	0	3 (100%)	0	0	0 (0 tons)
<input type="checkbox"/>	HOU 201	2003	Test2 Dispatcher User - Dispatch			95	0	95 (100%)	0	0	0 (0 tons)
<input type="checkbox"/>	HOU 202	2001	Ismael Fuentes - Driver			106	0	106 (100%)	0	0	0 (0 tons)
<input type="checkbox"/>	HOU 203	2002	David Vasquez - Driver			119	0	119 (100%)	0	0	0 (0 tons)
<input type="checkbox"/>	HOU 204	2000	Gyasi Edmond - Driver			103	0	103 (100%)	0	0	0 (0 tons)
<input type="checkbox"/>	HOU 205R	2004	Michael Burrell - Driver			44	0	44 (100%)	0	0	0 (0 tons)
<input type="checkbox"/>	HOU 206	2004	Michael Burrell - Driver			47	0	47 (100%)	0	0	0 (0 tons)
* HOUSTON - Roll Off - Monday Nov 6, 2023 ( 0 of 3 Completed)											
		4002	Tommy Cathey - Driver			4	0	4 (100%)	0	0	0 (0 tons)
<input type="checkbox"/>	HOU 301					1	0	1 (100%)	0	0	0 (0 tons)
<input type="checkbox"/>	HOU 302					3	0	3 (100%)	0	0	0 (0 tons)

SERVICES LIST

Dispatch Select Print Format SET POSTING EDIT PRINT COMPLETED Search

ROUTE	SEQ	ORDER NOTE	LOCATION	SCHEDULED DATE	CREATED ON	WO#	WO TYPE	SERVICE TYPE	QTY	EQUIPMENT	PHOTOS
			PEARLAND	Mon 11/6/23	11/6/23 8:34am	6932415	On Call	FL Extra Pick Up	1	4 Yard FL	
			PEARLAND	Mon 11/6/23	11/6/23 10:54am	6932419	On Call	FL Extra Pick Up	1	8 Yard FL	
			PEARLAND	Mon 11/6/23	11/6/23 11:26am	6932420	Add Service	FL Delivery	1	10 Yard FL (Ser)	

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 OPERATIONS > DISPATCH

FROM: 01/17/23 TO: 01/18/23 DIVISION: HOUSTON LINE OF BUSINESS: Commercial, Roll Off, Residential

Standard Select Route Sheet Search

ROUTE	TRUCK	DRIVER	PRE TRIP	POST TRIP	OPTIMIZED	SCHEDULED	SERVICED	PENDING	DO NOT SERVICE	EXCEPTIONS	DISPOSAL
* HOUSTON - Commercial - Tuesday Jan 17, 2023 ( 0 of 6 Completed)											
* HOUSTON - Commercial - Wednesday Jan 18, 2023 ( 2 of 5 Completed)											
<input type="checkbox"/>	HOU 201	2003				106	15 (20)	61 (58%)	30 (28%)	1 (1%)	0 (0 tons)
<input type="checkbox"/>	HOU 202	2001				83	65 (94)	0	18 (22%)	0	0 (0 tons)
<input type="checkbox"/>	HOU 203	2002				106	0	83 (78%)	23 (22%)	0	0 (0 tons)
<input type="checkbox"/>	HOU 204	2000				106	0	82 (77%)	24 (23%)	0	0 (0 tons)
<input type="checkbox"/>	HOU 206	2004				45	32 (34)	0	13 (29%)	0	0 (0 tons)
* HOUSTON - Residential - Tuesday Jan 17, 2023 ( 0 of 19 Completed)											
* HOUSTON - Residential - Wednesday Jan 18, 2023 ( 12 of 20 Completed)											
<input type="checkbox"/>	HOU 101	3002				8	7 (88%)	0	1 (13%)	0	0 (0 tons)
<input type="checkbox"/>	HOU 102	3001				8	8 (100%)	0	0	0	0 (0 tons)
<input type="checkbox"/>	HOU 103	3000				5	5 (100%)	0	0	0	0 (0 tons)
<input type="checkbox"/>	HOU 401	5014				25	25 (100%)	0	0	0	0 (0 tons)
<input type="checkbox"/>	HOU 402	5002				29	29 (100%)	0	0	0	0 (0 tons)
<input type="checkbox"/>	HOU 403	5018				13	0	12 (92%)	1 (8%)	0	0 (0 tons)
<input type="checkbox"/>	HOU 404	5012				11	11 (100%)	0	0	0	0 (0 tons)

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.

FROM	TO	DIVISION	LINE OF BUSINESS
12/08/23	12/08/23	DAYTON, QAWASTE, Example	Commercial, Document Destructi
Standard		<input type="checkbox"/> All <input checked="" type="checkbox"/> <b>Example</b> ← <b>Group Name</b> <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 De			
+ CORPUS - Residential - Friday De			
+ 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						LOAD	
Standard										Select Route Sheet	
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)											
<input type="checkbox"/>	<input type="checkbox"/>	COR 201	951	Michael Sh...		129	0	129 (100%)	0	0	0 (0 tons)
<input type="checkbox"/>	<input type="checkbox"/>	COR 202		Rudy Espin...		91	0	91 (100%)	0	0	0 (0 tons)
<input type="checkbox"/>	<input type="checkbox"/>	COR 203	953	Marco Hurt...		133	0	133 (100%)	0	0	0 (0 tons)
<input type="checkbox"/>	<input type="checkbox"/>	COR 204				1	0	1 (100%)	0	0	0 (0 tons)
<input type="checkbox"/>	<input type="checkbox"/>	COR 301		Juan Bonill...		1	0	1 (100%)	0	0	0 (0 tons)
<input type="checkbox"/>	<input type="checkbox"/>	COR DU...				1	0	1 (100%)	0	0	0 (0 tons)
CORPUS - Medical Waste - Friday Dec 8, 2023 ( 0 of 1 Completed)											
<input type="checkbox"/>	<input type="checkbox"/>	COR-RM...		Matthew V...		2	0	2 (100%)	0	0	0 (0 tons)
CORPUS - Residential - Friday Dec 8, 2023 ( 0 of 3 Completed)											
<input type="checkbox"/>	<input type="checkbox"/>	COR 101	324	Pedro Hern...		65	0	65 (100%)	0	0	0 (0 tons)
<input type="checkbox"/>	<input type="checkbox"/>	COR 401	5039	Luis Villa -...		380	0	379 (100%)	1 (0%)	0	0 (0 tons)
<input type="checkbox"/>	<input type="checkbox"/>	COR RS ...				1	0	1 (100%)	0	0	0 (0 tons)
CORPUS - Roll Off - Friday Dec 8, 2023 ( 0 of 1 Completed)											
<input type="checkbox"/>	<input type="checkbox"/>	ALVARO	Alvaro	Dave Pike -...		7	0	7 (100%)	0	0	0 (0 tons)
DAYTON - Commercial - Friday Dec 8, 2023 ( 0 of 7 Completed)											
<input type="checkbox"/>	<input type="checkbox"/>					1	0	1 (100%)	0	0	0 (0 tons)
<input type="checkbox"/>	<input type="checkbox"/>	DAY 201	971	Olivia Paig...	11:10 am	104	0	104 (100%)	0	0	0 (0 tons)

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.

ID	NAME	LOB	ACTION CATEGORY	INVENTORY MOVE TYPE	MANIFEST NOTIFICATION TEMPLATE
DDSV				None	
DEL_HAZ				None	
DUMPONLY				None	
FL_DELIVER				Delivery	
FL_EXCHANGE				Exchange	
FL_EXTRAPU				None	
FL_MISSED				None	
FL_MOVE				None	
FL_RELOCAT				None	
FL_REMOVE				Removal	
FL_REPAIR				None	Service Report-Work Order @...
FL_SERVICE				None	
INBOUNDLD				None	
new1				None	
ONCALL_HAZ				None	
REM_HAZ				None	
RETURNBOX				None	
RMW_DEL				None	Service Report-Manifest @w...
RMW_FINAL				None	Service Report-Manifest @w...
RMW_ONCALL				None	Service Report-Manifest @w...
RMW_Setup				None	Service Report-Manifest @w...
RMW_SVC				None	Service Report-Manifest @w...
RMW_XTRAPU				None	Service Report-Manifest @w...
RO_DELIVER				Delivery	

**WORK TYPE SETUP**

LINE OF BUSINESS: All

**ADD WORK TYPE**

Details | NavuNav Settings

ID:

NAME:

LINE OF BUSINESS:

INVENTORY MOVE TYPE:

ACTION CATEGORY:

MANIFEST NOTIFICATION TEMPLATE:

CREATE ONE SERVICE RECORD PER QUANTITY:

ENABLE DISPOSAL OR MATERIAL ENTRY:

ENABLE CONSOLIDATION BATCH LINK:

(INBOUND) REQUIRE SOURCE LOCATION:

PRODUCTIVITY UNITS: 1.00

**SELF-SERVICE LABEL:**

DESTRUCTION DATE TRACKING:

Route Optimization:

ORDER BASELINE SECONDS:

DEFAULT SECONDS PER UNIT:

SAVE

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	DIVISION	SERVICE REGION
2023	HOUSTON	All

**LOAD**

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	
Aliena Somers	\$ 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	
House Account	\$ 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%	
House Acct non System	\$ 285.89 7 (6 Sites)	\$ 580.19 1 (1 Sites)	\$ 866.08	\$ 0.00 0	\$(2,188.20) 2	\$ 470.88 9 (9 Sites)	\$(851.24)	\$ 0.00 0 (0 Sites)	151.9496%	
Rob Tellez	\$ 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%)	
Janet Bettcher	\$ 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) 6	\$ 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	BASED 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	
Ken Smith	\$ 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	
Dana Pate	\$ 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	
Dave Peters	\$ 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%)	
House Account	\$ 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%	
Natalia Jones	\$ 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	
Alice Watters	\$ 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%	
Jeff Johnson	\$ 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	<input type="text" value="RORENTDAY"/>	ACTIVE	<input type="text" value="Yes"/>
NAME	<input type="text" value="Roll Off Daily Rental"/>	ENABLE NO CHARGE QUANTITY	<input type="text" value="No"/>
DOT DESCRIPTION	<input type="text"/>	ENABLE NEGATIVE AMOUNT	<input type="text" value="No"/>
LINE OF BUSINESS	<input type="text" value="Roll Off"/>	ENABLE MAX. WEIGHT CHARGE	<input type="text" value="No"/> UOM <input type="text"/>
EQUIPMENT TYPE	<input type="text"/>	ESTIMATED AVERAGE WEIGHT	<input type="text"/>
MATERIAL TYPE	<input type="text"/>	ENABLE MANUAL CHARGE	<input type="text" value="No"/>
RATE UOM	<input type="text" value="each"/>	ENABLE MINIMUM	<input type="text" value="No"/>
TAXABLE	<input type="text" value="Yes"/> CLASS <input type="text"/>	ENABLE VENDOR	<input type="text" value="No"/>
GL ACCOUNT	<input type="text" value="Service Income:Roll Off Service Income"/>	ENABLE EST. CHARGE QUANTITY	<input type="text" value="No"/>
TYPE	<input type="text" value="Service"/>	PRICING MODEL	<input type="text" value="None"/>
WEIGHT CHARGE	<input type="text" value="No"/>	BILL ZERO AMOUNT CHARGE	<input type="text" value="No"/>
ENABLE WASTE PROFILE	<input type="text" value="No"/>	DEFAULT QUANTITY	<input type="text" value="0.00"/>

Accounts Payable Settings

IS AP TRANSACTION

RATE INDEX

THRESHOLD DIS. RATE  ENABLE THRESHOLD

NavuNav Settings

HIDE IN NAVUNAV

REQUIRE COLLECTION TEST

PRINT LABEL

## 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

Service Frequencies

NavuNav Available Extra Charges

CHARGE CODEID	CHARGE CODE NAME	SEQUENCE
ROMATTRESS	Roll Off Mattress in Load	-
ROLINER	Roll Off Liner / Tarp	-
ROWAIT	Roll Off Wait Fee	-
DISP_TRASH	Disposal Trash	+
ROMINCHG	Roll Off Service Minimum Charge	+

Pathway: Setup > Services > Charge Code Setup; Line of Business

## Document Format - Fields Removed From Proposal Document Fields (16003)

In Document Format Setup, the list of available field options for Proposals has been updated to exclude the following fields:

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