

Shared Services (Accounts)

Last Modified on 07/07/2025 11:32 am PDT

Pathway: *Accounts > Active Services*

Shared services enable a single service to be split among multiple sites at the same location, such as businesses within a commercial building. Each site is billed individually for its share, using either a fixed amount or percentage. The setup uses a parent site to anchor the service, with child sites linked to it for flexible and efficient billing.

HIGHLIGHTS

PENDING

ACTIVE SERVICES (3)

Standard

TOTAL RECURRING \$ 48.00

QTY	SERVICE CODE	SERVICE ID	LAST ACTIVITY	FREQUENCY	SCHEDULE	PER UNIT RATE	RATE	WO MIN.	START DATE	END DATE	CONTRACT ...	LEGEND
1	Trash Svc - 96 Gallon Cart	38760		1x per week	T	\$ 25.00	\$ 25.00 per month		03/03/25			
1	Scale Inbound Services	38911				\$ 0.00	\$ 0.00 per service		04/21/25			
1	2 Yard Trash Service	38994		1x per week	H	\$ 23.00	\$ 23.00 per month		06/23/25			

CALENDAR

June, 2025

EVENTS

Appointment, AR, Cancellation, Complaint, Er

LEGEND

SUN

MON

TUE

WED

THU

FRI

SAT

ADD SERVICE SHARE - 38995 - QTY: 1 - 3X PER WEEK - 2 YARD TRASH SERVICE

MAP ID	SITE ID	SITE NAME	ADDRESS	STATUS	AMOUNT	PERCENTAGE	NOTE
0	49432001	Osceolas Guac N Roll	444 N Cascade St Osceola, WI 54020	Active		50 %	
P	49433001	Subway	402 N Cascade St Osceola, WI 54020 Polk County US	Active		50 %	

SELECT A SITE ICON BELOW TO SHARE THIS SERVICE

Satellite

Osceolas Guac N Roll (49432001) Sales Rep Aliena Somers
444 N Cascade St
Osceola, WI 54020
Polk County

404
Osceolas Guac N Roll

SAVE

Permissions

The following permissions are necessary for setup and creating a shared service:

Permission ID	Permission Name
73	Add Active Service
118	Setup \ Services

Setup Requirements

For the Share icon to display with a site's service, **Enable Share** must be set to **Yes** on the service code.

ADD SERVICE CODE

?

✕

Service Code

SERVICE CODE		ACTIVE	Yes
NAME		ENABLE ROUTING	No
LINE OF BUSINESS		REQUIRE FREQUENCY	Yes
EQUIPMENT TYPE		ENABLE DRIVER UPDATE	No
MATERIAL TYPE		ENABLE ACCOUNT SIGNATURE	No
UOM		ENABLE DRIVER SIGNATURE	No
TAXABLE	No	ENABLE WORK ORDER MINIMUM	No
CLASS		ENABLE RENTAL FEE	No
GL ACCOUNT		ENABLE DEFAULT DESTINATION	No
TEMPORARY SERVICE GL ACCOUNT		ENABLE NEGATIVE AMOUNT	No
PRORATION METHOD	Calendar Days - Start and End	ENABLE ESTIMATES TRACKING	No
VACATION HOLD PRORATION METHOD	Do Not Prorate	ENABLE EQUIPMENT OWNERSHIP	No
BILL WHILE ON CREDIT HOLD	Yes	ENABLE SHARE	Yes
IS AP TRANSACTION	No	ENABLE VENDOR	No
EST MONTHLY VOL UOM			

Add/Remove a Shared Service

In the **Active Services** section of a site, select the **share** icon to open the **Add Service Share** popup. Nearby sites will display with a **green pin**, while the **parent site** is marked with a **red icon** labeled "P."

Add a Shared Service

1. Open the Customer Service screen of the parent site the service will be shared from.
2. In the **Active Services** section, select the **Share** icon for the service you want to share. This opens the **Add Service Share** screen, zoomed in on the parent site (red pin) and nearby sites (green pins).
3. Click the green pin of the desired share location to display a popup with the site's details. In the popup, select the green **Share** icon. This will add the site to the upper grid that is displayed above the map.
 - In the upper grid, enter either an **Amount** or **Percentage** to define how the service rate will be split.
 - Click **Save** when finished and the service will be shared to the child site.

Remove a Shared Service

1. Open the parent site of the shared service. Edits to a shared service can only be made through the parent site.
2. Open the shared service by clicking on the **Share** icon. This will open the **Add Service Share** screen.
3. Click within either the **Amount** or **Percentage** columns (dependent on how the share was set up) of the child site and enter "0." Upon **save**, the child site will be removed.

Parent Site of a Shared Service

When viewing the parent site of a shared service, the share icon appears next to the service along with a count of the sites it is shared with. Selecting the icon reopens the Add Service Share screen, where the shared amount or percentage can be adjusted.

Changes to the service and work order requests can only be made from the parent site of the shared



<div><div><div><div><div><div></div><div>+</div></div></div><div><div></div><div>49433</div></div><div><div>Subway</div></div></div></div></div>		<div><div><div><div><div><div></div><div>Active</div></div></div><div><div></div><div>402 N Cascade St</div><div>Osceola, WI 54020</div><div>US</div></div></div><div><div><div><div><div><div></div><div>100</div></div></div><div><div></div><div>TERMS</div></div><div><div></div><div>INVOICE DELIVERY</div></div><div><div></div><div>Net 20</div></div><div><div></div><div>Printed</div></div></div></div></div></div></div>		<div><div><div><div><div><div></div><div>DIVISION</div></div><div><div></div><div>ACCOUNT MGR</div></div><div><div></div><div>CLASS</div></div><div><div></div><div>BILL GROUP</div></div><div><div></div><div>ADVANCE - MONTHLY</div></div><div><div></div><div>Billed Thru Date None</div></div></div></div></div></div>		<div><div><div><div><div><div></div><div>QAWASTE</div></div><div><div></div><div>Aliena Somers - Admin-NS (Sales)</div></div><div><div></div><div>COMMERCIAL</div></div><div><div></div><div>QA Billing Cycle</div></div></div></div></div></div>		<div><div><div><div><div><div></div><div>1 of 1</div></div></div><div><div></div><div>402 N Cascade St</div><div>Osceola, WI 54020</div><div>Polk County</div><div>US</div></div></div><div><div><div><div><div><div></div><div>Active</div></div></div><div><div></div><div>DIVISION</div></div><div><div></div><div>SERVICE REGION</div></div><div><div></div><div>SALES REP</div></div><div><div></div><div>SOURCE</div></div><div><div></div><div>GENERATOR</div></div><div><div></div><div>SITE CLASS</div></div><div><div></div><div>SURCHARGE GRP</div></div><div><div></div><div>TAX REGION</div></div></div></div></div></div></div>			
<div><div><div><div><div><div></div><div>CURRENT</div></div><div><div></div><div>1-30</div></div><div><div></div><div>31-60</div></div><div><div></div><div>61-90</div></div><div><div></div><div>91-120</div></div><div><div></div><div>120+</div></div><div><div></div><div>TOTAL</div></div></div></div></div></div>		<div><div><div><div><div><div></div><div>0.00</div></div><div><div></div><div>0.00</div></div><div><div></div><div>0.00</div></div><div><div></div><div>0.00</div></div><div><div></div><div>0.00</div></div><div><div></div><div>0.00</div></div></div></div></div></div>		<div><div><div><div><div><div></div><div>Auto Pay Not Enabled</div></div></div></div></div></div>		<div><div><div><div><div><div></div><div>+</div></div></div><div><div></div><div>+</div></div></div></div></div>					
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<div><div><div><div><div><div></div><div>QTY</div></div><div><div></div><div>SERVICE CODE</div></div><div><div></div><div>SERVICE ID</div></div><div><div></div><div>LAST ACTIVITY</div></div><div><div></div><div>FREQUENCY</div></div><div><div></div><div>SCHEDULE</div></div><div><div></div><div>PER UNIT RATE</div></div><div><div></div><div>RATE</div></div><div><div></div><div>↑</div></div><div><div></div><div>WO MIN.</div></div><div><div></div><div>START DATE</div></div></div></div></div></div>		<div><div><div><div><div><div></div><div>1</div></div></div></div></div></div>									
<div><div><div><div><div><div></div><div>+</div></div></div><div><div></div><div>1</div></div><div><div></div><div>2 Yard Trash Service</div></div><div><div></div><div>38995</div></div><div><div></div><div>3x per week</div></div><div><div></div><div>T,H,S</div></div><div><div></div><div>\$ 65.00</div></div><div><div></div><div>\$ 65.00 per month</div></div><div><div></div><div>06/26/25</div></div></div></div></div>		<div><div><div><div><div><div></div><div>1</div></div></div></div></div></div>									
<div><div><div><div><div><div></div><div>CALENDAR</div></div></div><div><div><div><div><div><div></div><div>June, 2025</div></div></div></div></div></div></div></div></div>		<div><div><div><div><div><div></div><div>EVENTS</div></div></div><div><div><div><div><div><div></div><div>Appointment, AR, Cancellation, Complaint, Er</div></div></div></div></div></div></div></div></div>		<div><div><div><div><div><div></div><div>+</div></div></div><div><div></div><div>+</div></div></div></div></div>							
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<div><div><div><div><div><div></div><div>Jun 1</div></div></div></div></div></div>		<div><div><div><div><div><div></div><div>Jun 2</div></div></div></div></div></div>		<div><div><div><div><div><div></div><div>Jun 3</div></div></div></div></div></div>		<div><div><div><div><div><div></div><div>Jun 4</div></div></div></div></div></div>		<div><div><div><div><div><div></div><div>Jun 5</div></div></div></div></div></div>		<div><div><div><div><div><div></div><div>Jun 6</div></div></div></div></div></div>	

Child Site of a Shared Service

When viewing the child site of a shared service, the service will be highlighted. Expanding it displays the parent site the service is shared from, along with the expected shared rate.



Servicing a child site:

1. Shared services in a child site cannot be edited, and service requests cannot be created. All changes and requests must be made from the parent site of the shared service.
2. The child site can access **View Billing**, **View Routing**, and **View Service History** by right-clicking anywhere on the shared service.

49432

Osceolas Guac N Roll

100

444 N Cascade St
Osceola, WI 54020
US

TERMS

Net 20

INVOICE DELIVERY

Printed

CURRENT

1-30

31-60

61-90

91-120

120+

TOTAL

0.00

0.00

0.00

0.00

0.00

0.00

0.00

0.00

Auto Pay Not Enabled

Active

DIVISION

ACCOUNT MGR

CLASS

BILL GROUP

ADVANCE - MONTHLY

Billed Thru Date None

QAWASTE

Aliena Somers - Admin-NS (Sales)

COMMERCIAL

QA Billing Cycle

49432001

Osceolas Guac N Roll

1 of 1

444 N Cascade St
Osceola, WI 54020
Polk County
US

Active

DIVISION

SERVICE REGION

SALES REP

SOURCE

GENERATOR

SITE CLASS

SURCHARGE GRP

TAX REGION

QAWASTE

QA Waste OPEN MARKET

Aliena Somers - Admin-NS (Sales)

Call In

Small Quantity Generator

COM

Fuel Surcharge - Residential

<Not Set>

HIGHLIGHTS

PENDING

ACTIVE SERVICES (1)

Standard

Billing Example

Single invoices must be generated from the parent site of a shared service. When an invoice is created for the parent site, a corresponding invoice is automatically generated for the child site. The service **Rate** will display the full amount, while the **Total** will reflect the shared portion or percentage the child site is responsible for.

49432

Osceolas Guac N Roll

444 N Cascade St
Osceola, WI 54020
US

Active

100

100

100

100

TERMS

Net 20

Printed

INVOICE DELIVERY

48.72

0.00

0.00

0.00

0.00

0.00

48.72

DIVISION

QA/WASTE

ACCOUNT MGR

Aliena Somers - Admin-NS (Sales)

CLASS

COMMERCIAL

BILL GROUP

QA Billing Cycle

ADVANCE - MONTHLY

Billed Thru Date Jul 31, 2025

Auto Pay Not Enabled

49432001

Osceolas Guac N Roll

444 N Cascade St
Osceola, WI 54020
Polk County
US

Active

1 of 1

100

100

100

DIVISION

QA/WASTE

SERVICE REGION

QA Waste OPEN MARKET

SALES REP

Aliena Somers - Admin-NS (Sales)

SOURCE

Call In

GENERATOR

Small Quantity Generator

SITE CLASS

COM

SURCHARGE GRP

Fuel Surcharge - Residential

TAX REGION

<Not Set>

HIGHLIGHTS

PENDING

ACTIVE SERVICES (1)

Standard

TOTAL RECURRING \$ 65.00

LEGEND

QTY	SERVICE CODE	SERVICE ID	LAST ACTIVITY	FREQUENCY	SCHEDULE	PER UNIT RATE	RATE	WO MIN.	START DATE	END DATE	CONTRACT ...
1	2 Yard Trash Service	38995		3x per week	T,H,S	\$ 32.50	\$ 32.50 per month		06/26/25		

Shared From: Subway (49433001)
402 N Cascade St
Osceola, WI - 54020

Reason: CHG-Price Increase

NavuSoft, Inc
200 Santa Monica Pier
Santa Monica, CA 90401-3126

INVOICE # 915842
ACCOUNT # 49432
AMOUNT \$ 48.72
DATE Jun 27, 2025
DUE DATE Jul 17, 2025

Pay Online
navuga-customerportal.navusoft.net login or
use QUICK PAY CODE 7796E

Pay By Check 347 N Rodeo Dr
Beverly Hills, CA 90210

Enclosed Check #
Amount

Osceolas Guac N Roll
444 N Cascade St
Osceola, WI 54020

For proper credit return this portion

DATE	DESCRIPTION	PO #	QTY	RATE	TOTAL
06/26/25 - 06/30/25	2 Yard Trash Service		1	\$ 65.00 per month	5.42
07/01/25 - 07/31/25	2 Yard Trash Service		1	\$ 65.00 per month	32.50
06/27/25	Paper Bill Fee - Commercial - 915842		1		7.00
	Fuel Surcharge-Commercial				1.90
	Fuel Surcharge-Residential				0.00
	Pearland Franchise Fee				1.90
	Site Total				\$ 48.72

INVOICE TOTAL \$ 48.72

Current 48.72

1-30 Days 0.00

31-60 Days 0.00

61-90 Days 0.00

Over 90 Days 0.00

Total Due 48.72

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

Thank You for your business!

LEGEND

THU	FRI	SAT
Jul 2	Jul 3	Jul 4
Jul 9	Jul 10	Jul 11
Jul 16	Jul 17	Jul 18
Jul 23	Jul 24	Jul 25
		Jul 5
		Jul 12
		Jul 19
		Jul 26