

# Release Version 73 [Archive]

Last Modified on 08/08/2025 8:25 am PDT



The release notes in this article correspond to version 73. Screens and logic may have changed in newer versions.

## Home Screen

### NavuProject - Screen Changes Made To Navu Projects (16734)[New Feature]

The Navu Projects screen has been updated with the following enhancements, organized into two tabs: Projects and Tasks, and Recent Activity:

#### Projects and Tasks Tab

- 1. The Navu Projects screen has been organized into two tabs: 'Projects and Tasks' and 'Recent Activity.'
- 2. A *Last Activity* column was added and will also display in both project and task grids (use expand/collapse) to view.
- 3. A *Note* column was added. Select the green 'plus' icon to add a note.
- 4. An *Attachment Count* column was added and displays as a link with a total count of attachments for both projects and tasks. Select the link to open the Attachments popup window to review and add attachments.

NAVU PROJECTS												
Projects and Tasks		Recent Activity										
EXPAND ALL		COLLAPSE ALL		PROJECT STATUS			TASK STATUS					
				Not Started, In Progress			Not Started, In Progress, Cor					
PROJECT ID	PROJECT NAME	TYPE	PROJECT MANAGER	STATUS	START DATE	TARGET COMPLETION	LAST ACTIVITY	ATTACHMENT COUNT	PERCENT COMPLETION	TASKS		
										OPEN	IN PROGRESS	COMPLETED
1030	Implementation Template	New Customer Implementation	Holley Pate	In Progress	06/01/2023	06/30/2023		0	0%	10	0	0
1131	Test Project	Internal Project	Nikita Raiyani	Not Started	09/01/2023	05/15/2024	05/16/2024	1		0	0	0

#### Recent Activity Tab

A Recent Activity tab was added to improve activity visibility and organizes projects and tasks using date range filters.

NAVU PROJECTS

Projects and Tasks

Recent Activity

CREATED WITHIN

Last 24 Hours

ACTION	ID #	NAME	CREATED ON	REPLY
Project Task Time Entry Note	TASK-2494	06/03/2024 - Daily Implementation Tasks	Jun 03, 24 1:48pm	
<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><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></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><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></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><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></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><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></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><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></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><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></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><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></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><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></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><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></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><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></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><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></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><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></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><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></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><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></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><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></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><div></div><div></div><div></div><div></div><div></div><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Pathway: Home > NavuProjects

### Assigned Tasks - Name Changed To Task Management and Other Enhancements Made - (16961)

The following changes have have been applied to the Task Management screen that was previously called "Assigned Tasks:"

- 1. Division and Priority filters have been added as available filtering options.
- 2. Columns 'Division' and 'Type' were added.
- 3. Display counts were added alongside the filter options to show the Count of total tasks and the amount of tasks that are Past Due.

TASK MANAGEMENT

1

DIVISION

QAWASTE

PRIORITY

All

TASKS

User Tasks

USER

All

TYPE

All

SHOW CLOSED (30 DAYS)

3

PAST DUE

0

COUNT

0

PRIORITY

STATUS

2

DIVISION

NAME

TYPE

DUE DATE

CREATED BY

ASSIGNED TO

NOTE

ATTACHMENT

Pathway: Task Management

## Accounts

### Create On Call Order (Accounts) - Update to Route Selection Drop Down (16535)[New Feature]

An enhancement has been implemented in the Route selection drop down menu when creating an on-call order or editing a service record. Now, it displays the name of the default driver for the route alongside the route name.

Pathway: Accounts > Search > Accounts

## Accounts - Logic Updated to 'Bill To Selection' Field in Add Site's Billing Settings (16704)[New Feature]

In the Billings Settings section of Add Site, for accounts with 'Bill By Site' enabled, the 'Bill to Selection' field will automatically default to 'Invoice Mailed to Account Address.'

Pathway: Accounts > Add/Edit Site

## Orders, Quotes and Contracts (Accounts) - Map Not Loading if Change to Site Selection (16546)

The issue that prevented the map from loading the location when the site selection was changed on the Add Service screen for quotes and proposals has been resolved.

Pathway: Accounts > Orders, Quotes and Contracts

## Orders, Quotes and Contracts (Accounts) - Logic Updated for Validation of Discounted Rates (16793)

The logic for discount calculation has been corrected for proposals/contracts with 'Pre-Authorization' set to "Required for Rates Below Max. Discount" in the Add/Edit Document Type setup. Validation is also based on the what was entered in the Max Default Rate Discount field defined within the user's role.

ID	NAME	FORM TYPE	REASON CODE	IS RENEWAL TYPE	IS TEMP	PRE-AUTHORIZATION
1	A-New Service	Proposal	ADD-Add Svc - New Service	No	No	Not Required
11	A-New Service-noPreAuthAuto approve	Service Contract	ADD-Add Svc - New Service	No	No	Not Required
21	A-New		ADD-Add Svc - New Service	No	No	Not Required
36	Chg Svc					
48	Chg Svc					
60	Chg Svc					
78	Chg Svc					
79	Chg Svc					
80	Chg Svc					
81	Chg Svc					
82	Chg Svc					
83	Chg Svc					
84	Chg Svc					
85	Chg Svc					
86	Chg Svc					
87	End Svc					
88	A-Chg					
89	A-New					
90	A-New					
91	A-New					
92	A-New Business-temp	Proposal				
93	A-New Customer	Proposal				
94	A-Reinstate-Bad Debt Cust	Proposal				
95	Chg-Contract Renewal	Proposal				
96	Chg-Pt Roll Back	Proposal				
97	Chg-Price Match	Proposal				
98	Chg-Temp Decrease In Svc	Proposal				
99	Chg-Temp Increase In Svc	Proposal				
100	A-Change in LOB/Equipment	Service Contract	ADD-Change in LOB/Equip	No	No	Not Required
101	A-New Business-Acquisition	Service Contract	ADD-New Bus-Acquisition	No	No	Not Required

Pathway: Accounts > Orders, Quotes and Contracts; Setup > Document Formats > Type

## AR History (Accounts) - Logic Updated to Chargebacks (16658)[New Feature]

An "Amount" field has been added to the Record Chargeback screen, allowing users to enter partial amounts as needed. By default, the field will be pre-filled with the payment amount.

CURRENT	1-30 DAYS	31-60 DAYS	61-90 DAYS	91-120 DAYS	120+ DAYS
-95.00	0.00	0.00	0.00	0.00	36.00

DATE	DUE DATE	PERIOD	SITE ID	TYPE	REFERENCE NO	AMOUNT
05/13/24		2024-05		Payment - Mastercard - Credit Card	87528413_9999	(100.00)
05/13/24		2024-05		Payment - Mastercard - Credit Card	87525335_9999	(75.00)
10/31/23	11/20/23	2023-10		Invoice	888560	175.00

POSTING DATE

AMOUNT 45.00

NOTE

SAVE

Pathway: Accounts > AR History



## AR History (Accounts) - Authorization Logic Updated to Generate Single Invoices (16829)[New Feature]

The following changes have been applied to the Create Invoice screen and the permission it includes:

- The 'Create Invoice' screen has been renamed to 'Preview Invoice.'
- The permission logic for the 'Generate Invoice' button has been updated. If a user does not have permission 262, 'Generate Single Invoice,' the button will be inactive, and the following message will be displayed: "User not authorized to generate a single invoice."
- Permission 262 has been renamed from 'Add Single Invoice' to 'Generate Single Invoice.'

PREVIEW INVOICE

This Site | BILL TO DATE | INVOICE DATE

Arrears - Monthly  
Billed Thru Date Oct 31, 2022  
Next Invoice Date Jan 31, 2024 BATCH-25689 (in progress) - Not included on batch

<input type="checkbox"/>	SITE ID	START DATE	END DATE	GROSS QTY	NO CHARGE QTY	QTY	NAME	PO #	AMOUNT	SURCHARGES	TAXES	TOTAL	
									Total	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00

GENERATE INVOICE User not authorized to generate a single invoice.

## AR History (Accounts) - Payment Methods Renamed To 'Wallet' (16837)[New Feature]

The "Payment Methods" section within an account's AR History screen has been renamed to "Wallet." This change has been reflected across all subsequent screens, including the Customer Portal.

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	527.93	527.93

☒ Limit to open items
 STATEMENT INVOICE AUTO APPLY BALANCE WRITE OFF WALLET (0)
  Search

DATE	DUE DATE	PERIOD	SITE ID	TYPE	REFERENCE NO	AMOUNT	APPLIED AMOUNT	BALANCE
10/01/23	10/11/23	2023-10		Invoice	884157	314.59		314.59

ACCOUNT WALLET

ACCOUNT HOLDER NAME	TYPE	LAST 4 DIGITS	EXPIRATION DATE	STATUS	AUTO PAY	DAY OF MONTH	AUTO PAY MAX	CREATED BY	PROCESSOR
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ADD ACCOUNT WALLET

TYPE

NAME

AUTOMATED PAYMENT

DESCRIPTION

SAVE

Pathway: Customer Service Screen > AR History

## AR History (Accounts) - Chargebacks Not Showing in AR History (17066)

A fix has been deployed to resolve the issue where chargebacks were not showing on the AR History screen after a payment reversal.

AR HISTORY									
CURRENT		1-30 DAYS	31-60 DAYS	61-90 DAYS	91-120 DAYS	120+ DAYS	TOTAL		
-45.00		0.00	0.00	0.00	0.00	36.00	-9.00		
<input type="checkbox"/> Limit to open items		STATEMENT	INVOICE	AUTO APPLY	BALANCE WRITE OFF	WALLET (2)	4444 RECENTLY EXPIRED		
DATE	DUE DATE	PERIOD	SITE ID	TYPE	REFERENCE NO	AMOUNT	APPLIED AMOUNT	BALANCE	RUNNING SUM
07/17/24	2024-07			Chargeback Reversal - Masterc...	87525335_9999	50.00			(9.00)
05/14/24	2024-05			Payment - Mastercard - Credit ...	87602669_9999	(58.00)	58.00		(59.00)
05/14/24	2024-05			Payment - Mastercard - Credit ...	87601550_9999	(58.00)	58.00		(1.00)
05/14/24	2024-05			Chargeback Reversal - Masterc...	87528413_9999	55.00			57.00
05/13/24	2024-05			Payment - Check	6854	(145.00)			2.00
05/13/24	2024-05			Payment - Mastercard - Credit ...	87528413_9999	(100.00)	0.00	(45.00)	147.00
05/13/24	2024-05			Payment - Mastercard - Credit ...	87525335_9999	(75.00)			247.00
05/13/24	2024-05			Declined - Mastercard - Credit ...		0.00			322.00
05/13/24	2024-05			Declined - Mastercard - Credit ...		0.00			322.00
05/13/24	2024-05			Chargeback Reversal - Check	6854	145.00			322.00
05/13/24	2024-05			Chargeback Reversal - Masterc...	87525335_9999	25.00			177.00
02/28/24	2024-02			Credit Memo - Adjustment	888569	(23.00)	23.00		152.00
10/31/23	11/20/23	2023-10		Invoice	888569	175.00	(139.00)	36.00	175.00

Pathway: Accounts > AR History

## Account Request Management (Accounts) - User and Timestamp Added to Closed Requests (16817) [New Feature]

An enhancement has been implemented on the Account Request screen to show the name of the user who completed the request and the timestamp of completion.

ACCOUNT REQUEST

Details

Photos

Linked Items

CREATED ON

10/26/23 10:32 am

CREATED BY

user@fakeEmail.com

TYPE

Customer Request

STATUS

Closed

By Aliena Somers on 05/14/24 3:27 pm

ASSIGNED TO

Aliena Somers - Admin-NS (Admin)

CONTACT

Paul G

REASON CODE

Pathway: Accounts > Account Request Management

## Customer Service Screen (Accounts) - Calendar to Display Rejected Credit Memos (16625)[New Feature]

An enhancement has been made to the Calendar on the Customer Service screen to display Rejected Credit Memos on the date they were rejected. When hovered over, a tooltip will show the reference number, amount, notes, and the rejection reason.

49033

Encanto Restaurant

2121 Hillhurst Ave  
Los Angeles, CA 90027-2003  
US  
(O) +1 323-741-7777

TERMS

Net 20

INVOICE DELIVERY

Printed

Active

DIVISION

QAWASTE

ACCOUNT MGR

Aliena Somers

CLASS

COMMERCIAL

BILL GROUP

QA Billing Cycle

ADVANCE - MONTHLY

Billed Thru Date Apr 30, 2024

1 of 2

2121 Hillhurst Ave  
Los Angeles, CA 90027-2003  
US  
(O) +1 323-741-7777

Active

DIVISION

SERVICE REGION

SALES REP

SOURCE

GENERATOR

SURCHARGE GRP

TAX REGION

TAX EXEMPT

CURRENT

1-30

31-60

61-90

91-120

120+

TOTAL

0.00

0.00

370.44

118.25

0.00

0.00

488.69

Auto Pay Not Enabled

HIGHLIGHTS

PENDING

3955

Service Contract

Aliena

05/06/2024

3961

Service Contract

Aliena

05/10/2024

11295

Courtesy Credit

Paul

05/07/2024

Loyalty Discount

ACTIVE SERVICES (2)

Standard

TOTAL RECURRING \$ 220.00

QTY	SERVICE CODE	SERVICE ID	FREQUENCY	SCHEDULE	PER UNIT RATE	RATE	WO MIN.	START DATE	END DATE
1	2 Yard Trash Service	D0E4	1x per week	M	\$ 100.00	\$ 100.00 per month		01/25/24	
1	2 Yard Trash Service	ODDC	1x per week	M	\$ 120.00	\$ 120.00 per month		02/01/24	

CALENDAR

May, 2024

EVENTS

Appointment, AR, Cancellation, Complaint, Ei

SUN	MON	TUE	WED	THU	FRI
Apr 28	Apr 29	Apr 30	May 1	May 2	May 3
		(1 views) - Paul			
May 5	May 6	May 7	May 8	May 9	May 10
1, FL_RELOCAT, 2YD, MSW (1 views) - Paul		Credit Memo 895465 Rejected Credit Memo - 1125 (1 views) - Paul	(1 views) - Paul	(1 views) - Paul	
May 12	May 13	May 14	May 15	May 16	May 17
(1 views) - Aliena Somers	(1 views) - Isabel Navarro	(1 views) - Isabel Navarro	(1 views) - Isabel Navarro		

Reference: 891596

Amount: -\$ 6.92

Note: Adjustment Test Paul

Rejection Reason: Incorrect Amount

Pathway: Accounts > Search > Accounts

## Create Account (Accounts) - Service Region Clearing When Address Is Added (16755)

Previously, an issue occurred when using an account template to create a new account: when an address was

added, the Service Region field would unexpectedly clear. This has been resolved.

Pathway: Accounts > Add Account

## Contacts (Accounts) - Warning For Blocked Email Addresses (16666)[New Feature]

An enhancement has been made for accounts set to 'Email With Link' or 'Email with Attachment.' If a billing contact's email is on the email blocklist, a red exclamation point icon will appear on both the account screen and the contacts screen. When users hover over the icon, a tooltip will display the warning.

Pathway: Accounts > Search > Accounts

## (Contacts) Accounts - 'Email to Contact' to Include Contact's Title and Label (16804, 16818)

When emailing out things such as statements and invoices, the 'Email to Contact' field has been updated to include the contact's title (if one exists) and their billing contact label if they are a billing contact.

AR HISTORY

CURRENT

1-30 DAYS

31-60 DAYS

61-90 DAYS

91-120 DAYS

120+ DAYS

TOTAL

2,095.03

0.00

0.00

0.00

0.00

527.93

2,622.96

Limit to open items

STATEMENT

INVOICE

AUTO APPLY

BALANCE WRITE OFF

WALLET (2)

Search

DATE

DUE DATE

PERIOD

SITE ID

TYPE

REFERENCE NO

AMOUNT

APPLIED AMOUNT

BALANCE

05/30/24

06/09/24

2024-05

41902001

Invoice

000160

2,095.03

2,095.03

10/01/23

10/11/23

2023-10

314.59

314.59

09/14/23

09/24/23

2023-09

105.74

105.74

08/10/23

08/20/23

2023-08

107.60

107.60

EMAIL STATEMENT

EMAIL TO CONTACT

EMAIL TO

Natalie (Sales Rep) - Billing Contact

SIERRA GREEN - Billing Contact

Aliena - Account Contact

SEND EMAIL

Pathway: Accounts > Search > Accounts

Add/Edit Contact (Accounts) - New Request Notification Field Added (16819)[New Feature]

A new 'Request Notification Method' field has been added to the Add/Edit Contact screen. The following options are available:

- None: Contact will not receive request notifications in text or email. Customer must check the portal for request updates.
- Text Message: Contact will receive request notifications as a text only.
- Email: Contact will receive request notifications as email only.

ADD CONTACT

Details

Customer Portal Access

Tags

Activity History

TITLE

NAME

EMAIL

EMAIL 2

PHONE 1

PHONE 2

PHONE 3

PHONE 4

NOTE

RECEIVE SERVICE NOTIFICATIONS

SERVICE NOTIFICATION METHOD

REQUEST NOTIFICATION METHOD

(999) 999-9999

(999) 999-9999

(999) 999-9999

(999) 999-9999

Yes

None

Text Message

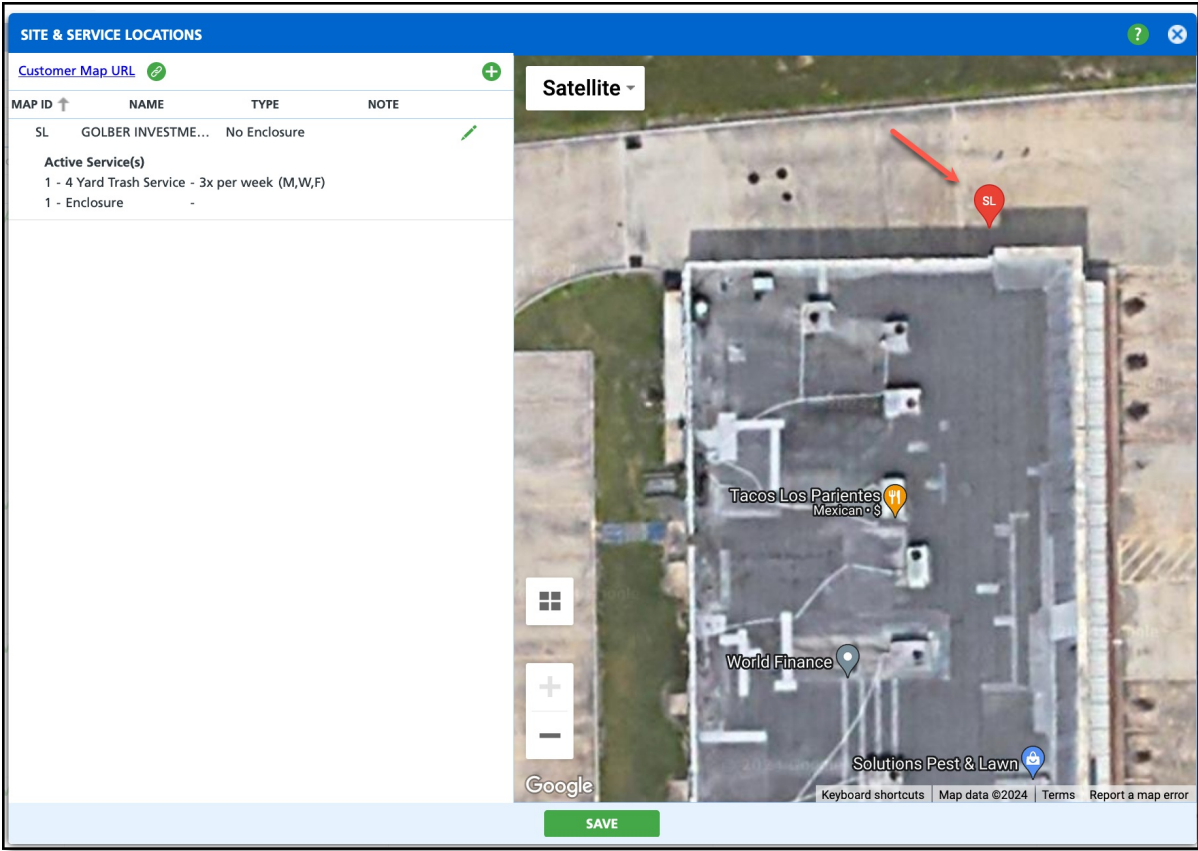
Email

SAVE

Pathway: Accounts > Customer Service Screen > Add/Edit Contact

Customer Service Screen (Accounts) - Geocoded Stops Reseting to Default Location (16800)

In scenarios where a service location pin was moved and saved, any updates made to the site would cause the service location to revert back to the default location. This has been resolved.



Pathway: Accounts > Customer Service Screen > Geocode Site (Site Details)

Customer Service Screen (Accounts) - Legend Added to Screen (16926)[New Feature]

An enhancement has been made to the account and site customer service screen to include a status Legend that will display upon hover.

04/26/2024

Amount: \$ 500.00 , Note:

02/26/2024

Amount: \$ 500.00 , Note:

SERVICE ID	FREQUENCY	SCHEDULE	PER UNIT RATE	RATE	WO MIN.	START DATE	END DATE	CONTRACT EXP.
84FA	Every 2 weeks	W	\$ 0.00	\$ 0.00 per month		03/27/24		...
5730			\$ 35.00	\$ 35.00 per month		03/27/24		...
20E8	On Call		\$ 0.00	\$ 0.00 per month		06/14/24		...

LEGEND

Account Status

Active

Bad Debt

Credit Hold

Inactive

Prospect

Site Status

Active

Exempt

Inactive

Prospect

Site Credit Hold

Vacant

Vacation Hold

Work Order Status

Cancelled

Do Not Service

In Progress

Not Serviced

Pending Payment or Approval

Scheduled

Service Completed

May 29

Jun 1

Jun 5

Jun 8

Jun 12

Jun 13

Jun 14

Jun 15

10 Yard Open Top Service, ADD-Add Svc - New Ser

(1 views) - Aliena Somers

Pathway: Customer Service Screen > Legend (Calendar)

Service Records (Accounts) - Allow Attachments To Display In NavuNav (16941)New Feature

An enhancement has been made to the Attachments tab in Edit Service Record to include an 'Available in NavuNav' checkbox option.

EDIT SERVICE RECORD

MON 101

SECTIONS 1-4

3519 Liberty Dr  
Pearland, TX 77581

CREATED BY  
Ferlin Justice on 5/10/24 3:55 am

ORDER REASON

SVC NOTE    SECTION 4 OF 4

WORK ORDER  
7833818

QTY  
712

SERVICE CODE  
RS BULK SERVICE

WORK TYPE  
RS\_SERVICE

ORDER TYPE  
Scheduled Service

ORDER NOTES

PO NUMBER

EXTERNAL ID

SCHEDULED DATE  
06/24/24 Monday

ROUTE  
HOU 101 - Aliena Somers

SEQUENCE  
0

DESTINATION / ORIGIN

WORK STATUS  
Scheduled

EXCEPTION REASON

POSTING STATUS  
Pending

Charges

Payments

Completion

Attachments <sup>1</sup>

Labels

Photos

ATTACHMENT ID	EXTERNAL ID	NAME	UPLOADED DATE	DISPLAY IN CUSTOMER PORTAL	AVAILABLE IN NAVUNAV	INCLUDE WITH INVOICE	DELETE
1082	Constructio...	Sample Construction Waste Pl...	06/24/24 12:24pm	Yes	Yes	Yes	

ADD ATTACHMENT TO SERVICE RECORD

ATTACH FILE

BROWSE..

EXTERNAL ID

DISPLAY IN CUSTOMER PORTAL

AVAILABLE IN NAVUNAV

INCLUDE WITH INVOICE

UPLOAD

Pathway: Service Record > Attachments (tab)

## Edit Service Record (Accounts) - Switch Work Type on Service Records Option Available (16833) [New Feature]

### Switch Work Type on Service Record

A green 'switch' button has been added to the Service Record screen, allowing users to switch work types for 'Scheduled' and 'On Call' services. This option is only available to work types that have 'Allow Switch to Work Type' enabled. Further information on setup is outlined in the section below.



EDIT SERVICE RECORD

T.D.C.J. - HIGHTOWER UNIT

902 FM 686

DAYTON, TX 77535

WORK ORDER

7696325

QTY

1

SERVICE CODE

40 Yard Open Top Service

EQUIPMENT

40YD-RO

WORK TYPE

RO\_DUMPRET

ORDER TYPE

Scheduled Service

ORDER NOTES

CREATED BY

David Navarro on 4/9/24 3:55 am

ORDER REASON

ACCESS

\*\*\*WHEN ARRIVING AT GATE FOR THE COMPACTOR, CALL 936-258-8013, EXT. 7277 SAY YOU NEED AN ESCORT IF TAKING TOO LONG TO ENTER\*\*\*

PO NUMBER

EXTERNAL ID

SCHEDULED DATE

05/24/24 Friday

ROUTE

DAY 301 - George Garza

SEQUENCE

0

DESTINATION / ORIGIN

WORK STATUS

Scheduled

EXCEPTION REASON

POSTING STATUS

Pending

Charges \$ 480.00

Source Location

Disposal / Ship

Payments

Completion

Attachments

Labels

Photos

Find existing source location

LOCATION ID	NAME	ADDRESS	ADDRESS2	CITY, STATE, ZIP	PHONE	STATE ID	NOTE	LINKED CHARGES
-------------	------	---------	----------	------------------	-------	----------	------	----------------

## Enable 'Allow Switch to Work Type' in Work Type Event Class Setup

The Update Work Type Event Class Item popup editor now includes an "Allow Switch to Work Type" field, which appears when "On Call" or "Scheduled Services" is selected in the Event Type field. Enabling this field by selecting an option will display the Switch icon for the corresponding work type.

WORK TYPE EVENT CLASS SETUP

SETUP > OPERATIONS > WORK TYPE EVENT CLASS

ID	NAME	LINE OF BUSINESS	LINKED SERVICE CODES
1000	Roll off Services	Roll Off	24
1001	Front Load Services	Commercial	26
1002	Residential Services	Residential	16
1004	Residential - Hand Throw	Residential	2
1005	Landfill	Inbound and Outbound	0
1006	Medical Waste	Medical Waste	2
1007	Transfer	Medical Waste	1
1008	Scale IN	Scale	1
1009	Document Destruction	Document Destruction	2
1010	Hazardous Waste Ser	Document Destruction	1
1011	MISC		1
1012	SCALE_OUT		1

Available Actions

EVENT CLASS	EVENT TYPE	WORK TYPE	ALLOW SWITCH TO WORK TYPE	ALLOW SELF-SERVICE ORDERING	NOTE
Roll off Services	On Call				
Roll off Services	On Call				
Roll off Services	Scheduled Service				
Roll off Services	On Call				
Roll off Services	Add Service	RO Swap	No		
Roll off Services	Quantity Increase	RO Delivery	No		
Roll off Services	Quantity Decrease	RO Removal	No		
Roll off Services	End Service	RO Removal	No		
Roll off Services	On Call	RO Delivery	No		
Roll off Services	On Call	RO/Packer Repair	No		
Roll off Services	Split Order	Dump Yard Box	No		

UPDATE WORK TYPE EVENT CLASS ITEM

EVENT

Roll off Services

EVENT TYPE

Scheduled Service

WORK TYPE

RO Dump/Return

ALLOW SWITCH TO WORK TYPE

RO Swap

ALLOW SELF-SERVICE ORDERING

No

NOTE

Pathway: Accounts > Search > Accounts; Setup > Operations > Work Type Event Class

## Add Site (Accounts) - Users Assigned Single Division Unable to Create Sites (17043)

An issue has been resolved where users with access to only one division were stuck in a loop between the "Duplicate Accounts" and "Add Site" windows. Selecting "Continue" from the Duplicates Accounts window will create the new site.

ADD SITE

Basic Settings

Billing Settings

BIC Profile

NAME

Wild Chutes

DIVISION

QAWASTE

NAME 2

SERVICE REGION

QA Waste OPEN MARKET

ADDRESS LINE 1

37200 Wild Mountain Rd

TAX REGION

ADDRESS LINE 2

CITY/STATE/POSTAL

PHONE 1

PHONE 2

OLD ID

PO#

SIGNATURE REQUIRED

NOTE

WARNING ON OPEN

ACCESS INFORMATION

BUSINESS HOURS

SERVICE WINDOW

DUPLICATE ACCOUNTS

Potential duplicates found. Would you like to Cancel or Continue?

ID	NAME	ADDRESS	DIVISION	STATUS	CREATED ON	SALES REP
<u>S49121001</u>	Wild Mountain	37200 Wild Mountain Rd	QAWASTE	Active	Jul 12, 2024	Aliena Somers
<u>A49121</u>	Wild Mountain	37200 Wild Mountain Rd	QAWASTE	Active	Jul 12, 2024	Aliena Somers
<u>A34824</u>	WILD OLIVES (RO)	24718 FM 2100 RD	DAYTON	Inactive	Jun 9, 2021	House Account
<u>A26538</u>	WILD OLIVES	24718 FM 2100 RD	DAYTON	Active		House Account
<u>S26538001</u>	WILD OLIVES	24718 FM 2100	DAYTON	Active	Mar 18, 2021	House Account
<u>S34824001</u>	WILD OLIVES (RO)	24718 FM 2100	DAYTON	Inactive	Apr 18, 2021	House Account

CONTINUE

CANCEL

Pathway: Accounts > Add Account

## Site Status History (Accounts) - Logic Updated to Effective Date Field (17067)

The logic for the Effective Date field in Site Status History has been updated, allowing a site to be made active, inactive, or placed on a vacation hold using the current date.



+

48990

Example Account 1

Active Service

Proposal and Contract

Site

Clone Site and Services

Account Request

ACH Credit

Appointment

Attachment

Cancellation Request

Contact

External Account

Lead

Manual Charge

Note

On Call Order

Rebate Check Prepayment

Safety Profile

Task

Available Products

Default Rates

Next Invoice Message

Send Email

Vendor Invoice

Export Vendor Invoice

by Blvd

CA 91776-3760

Net 20

VERY Printed

Active

DIVISION QAWASTE

ACCOUNT MGR House Account

CLASS COMMERCIAL

BILL GROUP Annual Billing

ADVANCE - ANNUALLY Billed Thru Date Jan 31, 2025

RENT	1-30	31-60	61-90	91-120	120+
00	0.00	0.00	0.00	0.00	0.00

PENDING

\$ 60587 Roll Off Delivery

\$ 60590 Roll Off Delivery

ard

+

+

+

TOTAL RECURRING \$ 35.00

Service

ed with service 84FA)

Service

ne, 2024

EVENTS

Appointment, AR, Cancellation, Complaint, Er

MON	TUE
May 26	May 27
May 28	
Jun 2	Jun 3
Jun 4	

Pathway: Customer Service Screen > '+' Menu

## Sales

### Rate Update Batch (Sales) - 'Next Invoice Date' Column Added To Rate Update Batch (16835)[New Feature]

An enhancement has been made to the Site Service Charge Rate Update Batch and Site Service Rate Update Batch to add a 'Next Invoice Date' column, displaying the date, batch number, and status.

SITE SERVICE CHARGE RATE UPDATE BATCH: 1014

GRID VIEW

Standard

NET VARIANCE \$29.70

EFFECTIVE DATE

10/01/2022

Search

NEW WO MINIMUM	CONTRACT EXPIRATION	ACCOUNT CLASS	BILL GROUP	NEXT INVOICE DATE	SERVICE REGION	SALES REP
		ROLL OFF-TEMP	HOU-RO ARREARS	03/01/2024 Batch # 25724 Batch Status # Processed	PEARLAND MUNICIPAL	Jeff Cecil
		ROLL OFF-TEMP	HOU-RO ARREARS	03/01/2024 Batch # 25724 Batch Status # Processed	PEARLAND MUNICIPAL	Janet Bettcher
		MUNICIPAL	HOU-RO ARREARS	03/01/2024 Batch # 25724 Batch Status # Processed	PEARLAND MUNICIPAL	Janet Bettcher
		ROLL OFF-TEMP	HOU-RO ARREARS	03/01/2024 Batch # 25724 Batch Status # Processed	PEARLAND MUNICIPAL	Michaela Moorman
		ROLL OFF-TEMP	HOU-RO ARREARS	03/01/2024 Batch # 25724 Batch Status # Processed	PEARLAND MUNICIPAL	Janet Bettcher
		ROLL OFF-TEMP	HOU-RO ARREARS	03/01/2024 Batch # 25724 Batch Status # Processed	PEARLAND MUNICIPAL	Janet Bettcher
		ROLL OFF-TEMP	HOU-RO ARREARS	03/01/2024 Batch # 25724 Batch Status # Processed	PEARLAND MUNICIPAL	John Briggs
		ROLL OFF-TEMP	HOU-RO ARREARS	03/01/2024 Batch # 25724	PEARLAND MUNICIPAL	Janet Bettcher

EXPORT

512 records / 2 selected / 512 visible

CLOSE

Pathway: Sales > Rate Update Batch

## Rate Update Batch (Sales) - Postal Code Added To Extended View and Export (16919)

Rate Update Batch has been updated to include a Postal Code column in the extended view for both the Service Charge Rate and Service Rate Update Batch screens, as well as in the export.

SITE SERVICE RATE UPDATE BATCH: 1003										
GRID VIEW		NET VARIANCE \$2,000.44		EFFECTIVE DATE		01/01/2022				
CITY	POSTAL CODE	QTY	SERVICE CODE	SERVICE FREQUENCY	CURRENT RATE	NEW RATE	VARIANCE	CURRENT WO MINIMUM	NEW WO MINIMUM	CUR RECUP MINI
DAYTON	77535	1	2 Yard Trash Service	1x per week	\$ 99.09					
DAYTON	77535	1	4 Yard Trash Service	1x per week	\$ 135.00					
BAYTOWN	77521-7608	1	2 Yard Trash Service	1x per week	\$ 74.00					
DAYTON	77535	1	1	2	3	4	5	6	7	8
DAYTON	77535	1	1	2	3	4	5	6	7	8
Dayton	77535	1	1	2	3	4	5	6	7	8
DAYTON	77535	1	1	2	3	4	5	6	7	8
DAYTON	77535	1	1	2	3	4	5	6	7	8
LIBERTY	77575	1	1	2	3	4	5	6	7	8
EXPORT										

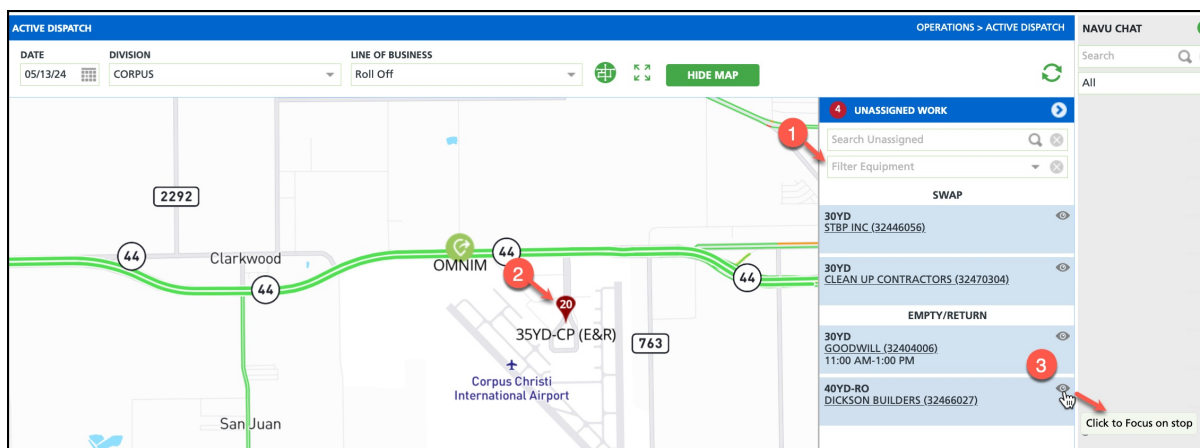
Pathway: Sales > Rate Update Batch

## Operations

### Active Dispatch (Operations) - Screen Enhancements (16188, 16621)[New Feature]

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

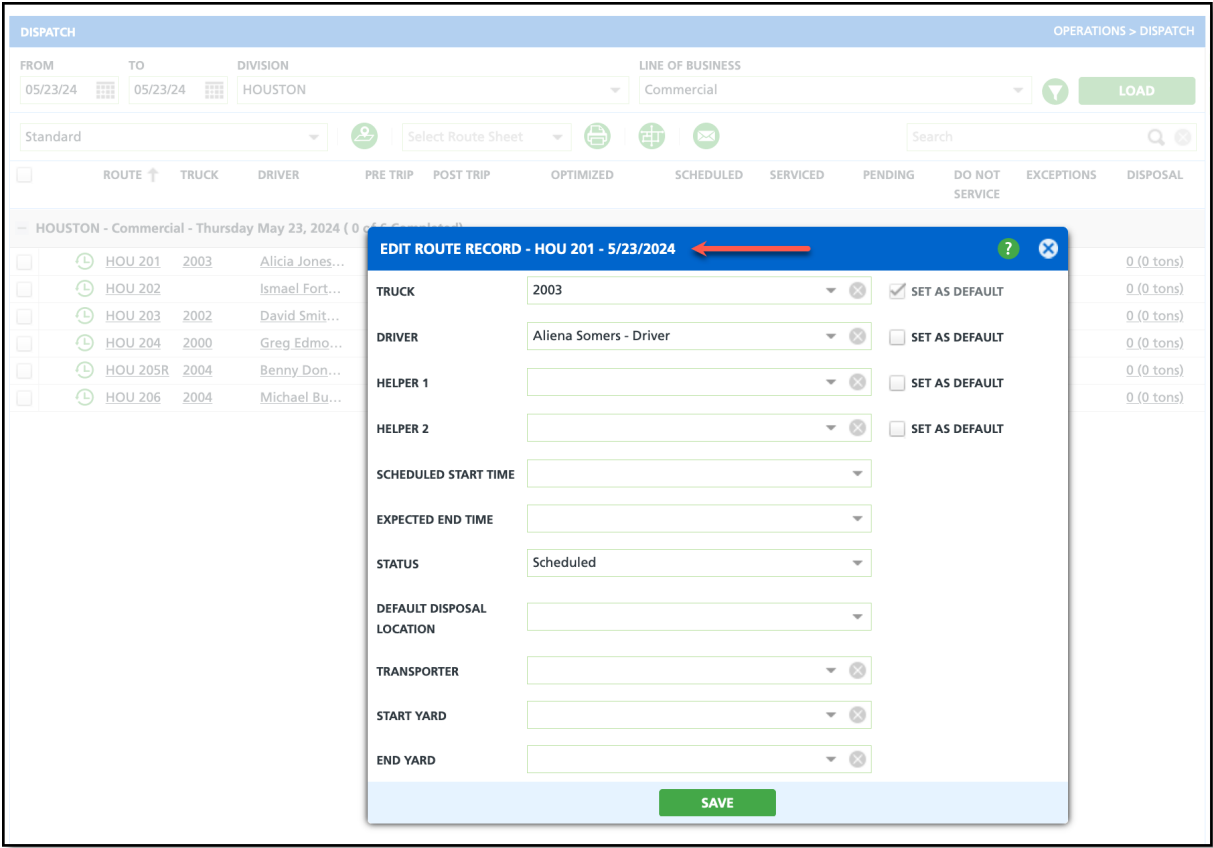
1. A Filter Equipment option has been added to further filter the Unassigned Work column.
2. The stop's sequence number displays inside the location pin (only for route assigned stops).
3. A toggle button has been added allow the user to "focus" on a specific unassigned stop. When selected, all other stops (assigned and unassigned) are hidden.



Pathway: Operations > Active Dispatch

Dispatch (Operations) - Edit Route Record Title Bar Updated (16851)[New Feature]

The title bar in the Edit Route Record popup editor has been updated to include the route name and date.



Pathway: Operations > Dispatch

Services List (Operations) - Logic Updated for Timestamp Discrepancy (16803)

The timestamp discrepancy between the timestamp on the Edit Service Record screen and the timestamp on the Services List screen has been resolved.

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
COR DU...	9:56 am		33623001 * VICTOR M GONZALEZ INSURANCE AGENCY 4137 GOLLIHAR ROAD, CORPUS CHRISTI	Thu 5/9/24	3/25/24 3:55am	7622691	Scheduled Service <b>COMPLETED</b> 9:56 am	FL Service	1	2 Yard FL	
COR DU...			32838001 * HAZMAC TRANSPORTATION 6707 JURICA ROAD	Thu 5/9/24	3/25/24 3:55am	7622692	Scheduled Service	FL Service	1	8 Yard FL	

WORK ORDER

QTY

SERVICE CODE

EQUIPMENT

WORK TYPE

ORDER TYPE

MATERIAL

7622691

1

2 Yard Trash Service

2YD

FL\_SERVICE

Scheduled Service

MSW

ORDER NOTES

PO NUMBER

EXTERNAL ID

SCHEDULED DATE

ROUTE

SEQUENCE

DESTINATION / ORIGIN

05/09/24 Thursday

COR DUMPSTER DEL/REM

0

WORK STATUS

EXCEPTION REASON

POSTING STATUS

Service Completed

Pending

Update History

Isabel Navarro on 6/3/24 9:56 am

ion

Lab Tests

Attachments

Labels

Photos

Timeline

WO MINIMUM

CALCULATE LAB QTY AND DISCOUNT

Pathway: Operations > Dispatch

## Route Management (Operations) - Sort Functionality Added to Start Date (16795)[New Feature]

Sorting logic has been implemented for the Start Date column in the Pending tab of the Route Management screen.

Pending

Current

Re-Number

HOUSTON

HOUSTON OPEN MARKET, LOS AI

Roll Off

Monday, Tuesday, Wed

LOAD

8 records

Search

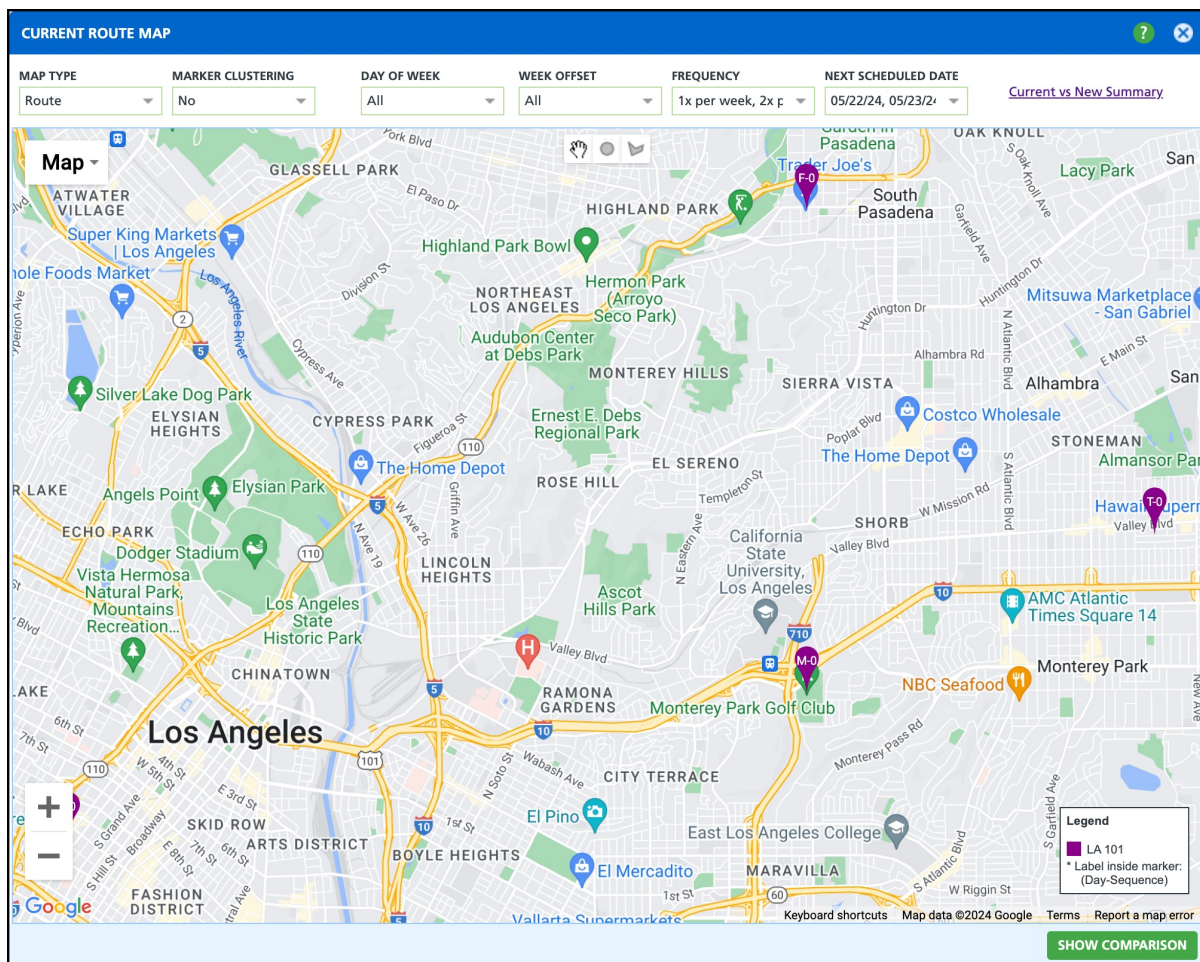
LOCATION	ADDRESS	QTY	SERVICE CODE	FREQUENCY	START DATE	ROUTE	SEQUENCE	WEEK OF MONTH	
<div>49017001</div> <div>Prospect test 3</div>	7620 Katy Fwy Houston, TX 77024-20...	2	10 Yard Ope... 10 Yard Ope... Recycle	1x per week W	Wed 03/06/24		0		POST
<div>4891800001</div> <div>QA Waste Processing</div>	6947 Yankee Rd Liberty Twp, OH 45044	1	20 Yard Ope... 20 Yard Roll ...	1x per week S	Sat 03/30/24 Sat 03/02/24		0 0		POST
<div>49015001</div> <div>Test Prospect</div>	9875 Long Point Rd Houston, TX 77055	1	10 Yard Ope... 10 Yard Ope... Recycle	1x per week S	Sat 02/03/24		0		POST
<div>48980001</div> <div>Roll Off Service Mini...</div>	6509 W Little York Rd Houston, TX 77040-48...	1	30 YD Open ... 30 Yard Roll ...	2x per week T,H	Tue 02/06/24 Thu 02/01/24		0 0		POST

Pathway: Operations > Route Management

## Route Management (Operations) - Map Marker Colors Enhanced (16790)

An enhancement has been made the Route Management Map to change the colors of the map markers to better stand out against the map background.





Pathway: Operations > Route Management

## Accounting

### AR Aging Management (Accounting) - Multiple Screen Enhancements (16657)[New Feature]

The following changes have been made to the AR Aging Management screen:

1. A drop down selection box has been added, offering two screen view options: Account Information or Contact Information.
  - The Account Information view will retain the information that was previously displayed before these views were added.
  - The Contact Information view will introduce additional columns: Has Active Service, Contact 1, and Contact 2. Meanwhile, the Account Manager, Auditor, and Bill Group columns are removed in this view.
2. The Export and Print buttons have been moved to the left of the Quick Filter drop down.
3. A Record count has also been added next to the AR Aging buckets.
4. AR Aging buckets have been moved inside the grey bar right above the grid.

AR AGING MANAGEMENT

ACCOUNTING > AR AGING MANAGEMENT

DIVISION

QAWASTE

TYPE

AR Aging By Past Due Date

ACCOUNT CLASS

COMMERCIAL

TERM

All

BILL GROUP

All

LOAD

ACCOUNT MANAGER

ACCOUNT STATUS

AUDITOR

MIN. PAST DUE BALANCE

Active, Bad Debt, C

Contact Information

2

Select Quick Filter

Search

ACT ID	ACCOUNT NAME	CONTACT 1	CONTACT 2	STATUS	HAS ACTIVE SERVICE	AVG DAYS TO PAY	LAST PAYMENT	LAST COLLECTIO... ACTIVITY	CURRENT	1-30	31-60	61-90	91-120	OVER 120	TOTAL	
RECORD COUNT: 29									TOTALS	-346.31	0.00	9,216.96	76,950.67	1,291.91	6,298.03	93,411.26
<input type="checkbox"/>	48982	Example Account 3		Credit H...	Yes	0			0.00	0.00	0.00	0.00	755.00	5,197.93	5,952.93	
<input type="checkbox"/>	49031	Li Cha Tea (T4 Cafe)	PG pg@FakeEmail.com	Active	Yes	0			0.00	0.00	0.00	302.50	295.79	0.00	598.29	
<input type="checkbox"/>	49032	San Marino Cafe & ...		Active	Yes	0			0.00	0.00	117.50	158.50	0.00	0.00	276.00	
<input type="checkbox"/>	49033	Encanto Restaurant		Active	Yes	0			0.00	0.00	370.44	118.25	0.00	0.00	488.69	
<input type="checkbox"/>	49034	Walgreens		Active	Yes	0			0.00	0.00	767.50	611.64	0.00	0.00	1,379.14	
<input type="checkbox"/>	49050	Nothing Bundt Cakes	Contact 1 Name contact1@FakeEmi: +1 888-555-1234	Active	Yes	0			0.00	0.00	167.50	23.18	0.00	0.00	190.68	
<input type="checkbox"/>	49065	Chloe Store		Active	Yes	0			0.00	0.00	1,064.50	0.00	0.00	0.00	1,064.50	
<input type="checkbox"/>	18535	Example Account 4	Lori S loris@FakeEmail.cc	Credit H...	Yes	32	07/19/23		-50.00	0.00	0.00	0.00	0.00	0.00	-50.00	
<input type="checkbox"/>	48969	Staples Center		Active	Yes	0	12/20/23		-25.00	0.00	0.00	0.00	0.00	0.00	-25.00	

Pathway: Accounting > AR Aging Management

## AR Payment Batch (Accounting) - Import Logic Updated to Use Default Payment Type (16809)[New Feature]

When importing payment batches, import logic has been updated to use the 'Default Payment Type' selection to populate the 'Type' field for each payment line.

BATCH - 11253 DIVISION - CORPUS

DATE03/21/2024

BANK ACCOUNTCOMERICA - FWS

STATUSOpen

NOTE

CREATED BY: Matthew Van Doren - 03/21/2024 9:48 am

POSTED BY:

+

SORT

Entry Order ↓

DEFAULT PAYMENT TYPE

ACH

COUNT2

Search for Payment in Batch

ACCOUNT ID	NAME	STATUS	BALANCE	TYPE	REFERENCE	AMOUNT	APPLIED AMOUNT	DEPOSIT	AUTO APPLY	
19017	BOND BRENDA & MA...	Active	\$ 202.16	ACH	9999	100.00	0.00	<input type="checkbox"/>	<input type="checkbox"/>	<div>Apply</div> <div></div> <div></div> <div></div>
30622	PIZZA HUT	Active	\$ 3,368.25	ACH	999	274.76	0.00	<input type="checkbox"/>	<input type="checkbox"/>	<div>Apply</div> <div></div> <div></div> <div></div>

POST

PRINT REPORT

VOID

IMPORT

Amount \$ 374.76

Pathway: Accounting > AR Payment Batch

## AR Payment Batch (Accounting) - F5 Refreshing Screen For Windows Users (16930)

Previously, when using the F5 shortcut to open the Search Accounts/Sites in the AR Payment Batch screen on a Windows system, the F5 key would also refresh the page. This issue has been resolved so that the page no longer refreshes when the F5 shortcut is used.

BATCH - 11361 DIVISION - QAWASTE

DATE 06/06/2024

BANK ACCOUNT BANK OF NAVU

STATUS Posted

NOTE

CREATED BY: Matthew Van Doren - 06/06/2024 6:06 am

POSTED BY:

+

SORT Entry Order ↓

DEFAULT PAYMENT TYPE

COUNT 1

Search for Payment in Batch

Q

ACCOUNT ID	NAME	STATUS	BALANCE	TYPE	REFERENCE	AMOUNT	APPLIED AMOUNT	DEPOSIT	AUTO APPLY	
48989	Central Perk WO# 7965630	Active	\$ 105.35	Credit Card	89253031_9999	5.00	0.00			<div>Apply</div> <div></div> <div></div>

SEARCH ACCOUNTS / SITES

Search for Account/ Site

Q

Double click on search result to add payment

ACCOUNT ID	STATUS	BALANCE	ACCOUNT NAME	SITE ID	SITE NAME	PREVIOUS ID
------------	--------	---------	--------------	---------	-----------	-------------

UN-POST

PRINT REPORT

VOID

IMPORT

Amount \$ 5.00

Pathway: Accounting > AR Payment Batch

## Invoice Message Management (Accounting) - New Screen Available (16963, 16972)[New Feature]

A new "Invoice Message Management" screen has been added to the Accounting module. This screen allows users to create and edit messages specific to a Division, Bill Group, Account Class, and Service Region, which will be displayed on customer invoices until the specified end date. Access to this screen is restricted to users with permission 461 (Invoice Message Management).

With the release of the Invoice Message Management screen, the 'Add/Edit Message' option for a billing batch has been removed.



Review the article linked at the bottom of this page for additional information on the Invoice Message Management screen.

ACCOUNTING > INVOICE MESSAGE MANAGEMENT

+

DIVISION

QAWASTE

BILL GROUP

All

☐ Show Inactive

Search

Q

↺

DIVISION	BILL GROUP	ACCOUNT CLASS	SERVICE REGION	EFFECTIVE DATE	END DATE	CREATED BY	CREATED TIMESTAMP
QAWASTE	QA Billing Cycle		QA Service Region 2	07/01/2024		Paul Gonzalez	7/5/24 9:17 am
July 4th Holiday will delay trash pickup by one day.							

HOME

ACCOUNTS

SALES

OPERATIONS

ACCOUNTING

REPORTS

DASHBOARD

SETUP

DATABASE

Billing

Invoice Message Management

AR Payment Batch

AR Aging Management

Auto Pay Management

Credit Card Expiration

Credit Card / ACH Reconciliation

Invoice Adjustment - Pending Approval and History

Invoice Notification Monitoring

Surcharge Management

Unapplied Management

Vendor/Rebate Payments

Vendor Invoice Management

GL Transaction Processing

Period Closing

Status Management

Calculate Manual Finance Charges and Late Fees

Process Auto Apply

Pathway: Accounting > Invoice Message Management

Article: [Invoice Message Management](#)

## Invoice Notification Monitoring (Accounting) - Screen Enhancements (16921)[New Feature]

An enhancement has been made to the Invoice Notification Monitoring screen to include a Type column and Type filter.

INVOICE NOTIFICATION MONITORING										ACCOUNTING > INVOICE NOTIFICATION MONITORING	
DIVISION	All	BILL GROUP	All	PERIOD	Mar 2023	TYPE	All	LOAD			
BATCH ID	TYPE	BILL GROUP	PRINTED	EMAILED				ED NOT PAID	NOT VIEWED	NOT PAID	
25537	All Charges	COR-Q1-JAN-APR-JUL-OCT	1751	0					1738		
25556	Single Invoice	DAY-RESI MONTHLY ADVANCE	1	0					1		
25557	Single Invoice	COR-Q1-JAN-APR-JUL-OCT	1	0					1		
25558	WO and Manual Charg...	HOU-MANUAL INVOICES	1	0			0	0	1		
25559	WO and Manual Charg...	HOU-MANUAL INVOICES	1	0			0	0	1		
25561	Single Invoice	HOU-COMMERCIAL ARREARS	1	0			0	0	1		
25562	Single Invoice	HOU-COMMERCIAL ARREARS	1	0			0	0	1		
25563	Single Invoice	HOU-COMMERCIAL ARREARS	1	0			0	0	1		
25564	Single Invoice	HOU-COMMERCIAL ARREARS	1	0			0	0	1		
25566	Single Invoice	DAY-COMM MONTHLY CURRENT	1	0			0	0	1		
25568	Single Invoice	DAY-COMM MONTHLY ARREARS	0	0			0	0	1		
25569	All Charges	DAY-COMM MONTHLY ARREARS	1	2			0	0	1		
25570	Single Invoice	DAY-COMM MONTHLY CURRENT	1	0			0	0	1		
25572	Single Invoice	DAY-Q1-JAN-APR-JUL-OCT	1	0			0	0	0		
25579	WO and Manual Charg...	VENDORS	1	0			0	0	1		
25580	WO and Manual Charg...	VENDORS	1	0			0	0	1		
25581	WO and Manual Charg...	VENDORS	1	0			0	0	1		
25600	All Charges	HOU-COMMERCIAL ARREARS	150	0			0	0	150		
25601	Single Invoice	DAY-Q3-MAR-JUN-SEP-DEC	1	0			0	0	0		
25604	Single Invoice	DAY-ROLF BI-WEEKLY	0	0			0	0	1		
25647	All Charges	DAY-Q1-JAN-APR-JUL-OCT	6965	0			0	0	6946		
25706	Single Invoice	HOU-COMMERCIAL ARREARS	1	0			0	0	1		
25739	Single Invoice	HOU-COMMERCIAL ARREARS	0	0			0	0	1		

Pathway: Accounting > Invoice Notification Monitoring

## Billing (Accounting) - Updates to 'Create Billing Batch' (16994)[New Feature]

When creating a billing batch, users will notice that the **Type** field has been updated to display the following selection options: 'All Charges' and 'Work Order and Manual Charges Only.' Additionally, the '**Bill From Date**' field

has been removed, and the logic for displaying the 'Bill To Date' field has been updated. When 'All Charges' is selected from the Type drop-down menu, the 'Bill To Date' field is displayed.

Pending and In ProcessHistory

DIVISIONAll

BILL GROUP	DIVISION	BATCH ID	TYPE	STATUS	INVOICE DATE
COR-ROLF MONTHLY	CORPUS	25675	All Charges	Not Started	11/30/2022
DAY-Q3-MAR-JUN-SEP-DEC	DAYTON	25811	All Charges	Not Started	01/01/2023
DAY-RESI MONTHLY ADVANCE	DAYTON	25637	All Charges	Processed	02/01/2023
DAY-ROLF BI-WEEKLY	DAYTON	25667	All Charges	Posted	02/16/2023
COR-Q1-JAN-APR-JUL-OCT					023
DAY-Q1-JAN-APR-JUL-OCT					023
DAY-COMM MONTHLY ARREARS					023
COR-ROLF BI-WEEKLY					023
DAY-COMM MONTHLY ADVANCE					023
COR-COMM MON ARREARS					023
DAY-ROLF LIBERTY					024
HOU-COMMERCIAL ARREARS					024
DAY-ROLF LIBERTY					024
HOU-RO ARREARS					024
DAY-Q2-FEB-MAY-AUG-NOV					024
QA Billing Cycle					024
Invoice Test Only					024
QA Billing Notification					024
Test 2					024
HOU-MANUAL INVOICES					024
HOU-COMMERCIAL ARREARS	HOUSTON	25809	WO and Manual Charges Only	Not Started	06/29/2024
	HOUSTON	25874	All Charges	Not Started	07/05/2024

CREATE BILLING BATCH

DIVISIONQAWASTE

BILL GROUPProrate Test Only / Monthly / Arrears / QAWASTE

TYPEWork Order and Manual Charges Only

INVOICE DATE07/08/2024

Work Orders and Manual Charges will be billed through 7/8/24.

CREATE BATCH

**Billing (Accounting) - Enhancement to Allow Omitting One or More Divisions from a Billing Batch (16882) [New Feature]**

Functionality has been added to exclude specific divisions from a billing batch when the batch includes more than one division. On the Billing screen, if a batch is in the 'Not Started' status and the Bill Group is not limited to a single division (see pathway for this setting below), the 'Omit Divisions from Billing Batch' option is available in the right-click menu. Upon selection, the 'Omit Division From Billing Batch' popup window is displayed with toggle switches to omit divisions.

**System Setting Pathway:** Setup > System > System Options > Account (tab)

Pending and In Process

History

+

DIVISION

All

BILL GROUP	DIVISION	BATCH ID	TYPE	STATUS	INVOICE DATE	TO DATE	INVOICE COUNT
HOU-COMMERCIAL ARREARS	HOUSTON	25875	WO and Manual Charg...	Not Started	07/09/2024		
DAY-RESI MONTHLY ADVANCE	DAYTON	25637	All Charges	Processed	02/01/2023	02/28/2023	988
DAY-Q2-FEB-MAY-AUG-NOV	DAYTON	25816	All Charges	Processed	03/05/2024	06/01/2024	1,720
Annual Billing	QAWASTE	25841	All Charges	Processed	01/15/2025	01/31/2025	1
DAY-COMM MONTHLY ADVAN...	DAYTON	25848	All Charges	Processed	10/01/2023	10/31/2023	260
COR-Q1-JAN-APR-JUL-OCT			All Charges	Posted	03/01/2023	03/01/2023	1,751
HOU-COMMERCIAL ARREARS			All Charges	Posted	01/31/2024	01/31/2024	1,191
DAY-ROLF LIBERTY			All Charges	Posted	01/15/2024	12/31/2023	8
DAY-ROLF LIBERTY			nd Manual Charg...	Not Started	02/28/2024	02/29/2024	
DAY-Q3-MAR-JUN-SEP-DEC			All Charges	Not Started			
COR-ROLF MONTHLY	CORPUS	25675	All Charges	Processed			21
QA Billing Cycle	QAWASTE	25878	All Charges	Processed			37
Test 2		25879	All Charges	Processed			7
QA Billing Notification	QAWASTE	25854	All Charges	Not Started			
DAY-COMM MONTHLY ARREARS	DAYTON	25683	All Charges	Processed			10
DAY...					02/16/2023		68
HOU...					06/01/2024		3

!

?

×

OMIT DIVISION FROM BILLING BATCH

DIVISION #	DIVISION NAME	ACCOUNTS IN BILLING	BATCH BILL GROUP
1001	QAWASTE	0	<input type="checkbox"/>
1002	CORPUS	0	<input checked="" type="checkbox"/>
1003	DAYTON	9	<input type="checkbox"/>
1004	HOUSTON	0	<input checked="" type="checkbox"/>
1005	HILLSBORO	0	<input type="checkbox"/>
1006	HEARNE	0	<input type="checkbox"/>
1007	TEST	0	<input type="checkbox"/>

Edit Batch

Pre-Billing

Process Billing

Void

Omit Divisions from Billing Batch

## GL Transaction Processing (Accounting) - Support for Individual GL Batch Creation (16732) [New Feature]

A new 'Create Individual GL Batches' button has been added to the GL Transaction Processing screen. When selected, the user will be prompted to add a note that will be copied onto each created GL Batch.



If the user has selected multiple batches and clicks 'Create Individual GL Batches,' one GL Batch will be created for each selected batch row.

GL TRANSACTION PROCESSING

ACCOUNTING > GL TRANSACTION PROCESSING

AR PERIOD

Jan 2023

LOAD

Pending

In Progress 20

Posted

Summary

TYPE

All

No Found Setup Errors

Search

	TYPE	REFERENCE #	AR PERIOD	DATE	COUNT	ERRORS	AMOUNT	DIVISIONS	POSTED BY
	TOTALS	26			7,862	11,425	\$ 160,568.13		
<input type="checkbox"/>	Billing Batch	25503	2023-01	01/31/2023	95	190 Fix Errors	\$ 11,448.84	CORPUS	Lori Sheldt 02/28/2023 10:13 am
<input type="checkbox"/>	Billing Batch	25505	2023-01	01/24/2023	6	12 Fix Errors	\$ 10.83	HOUSTON	David Navarro 01/24/2023 4:13 pm
<input type="checkbox"/>	Billing Batch	25506	2023-01	01/30/2023	1	2 Fix Errors	\$ 125.00	CORPUS	David Navarro 01/30/2023 7:24 am
<input type="checkbox"/>	Billing Batch	25507	2023-01	01/30/2023	1	2 Fix Errors	\$ 225.00	CORPUS	David Navarro 01/30/2023 11:40 am
<input type="checkbox"/>	Billing Batch	25512	2023-01	01/01/2023	5,425	6,732 Fix Errors	\$ 50,287.14	DAYTON	Lori Sheldt 05/18/2023 11:02 am
<input type="checkbox"/>	Billing Batch	25522	2023-01	01/06/2023	5	10 Fix Errors	\$ 108.26	CORPUS	David Navarro 02/06/2023 9:34 am
<input type="checkbox"/>	Billing Batch	25531	2023-01	01/01/2023	762	1,423 Fix Errors	\$ 21,166.41	DAYTON, HOUSTON	Lori Sheldt 02/28/2023 9:59 am
<input type="checkbox"/>	Billing Batch	25540	2023-01	01/01/2023	1,065	2,130 Fix Errors	\$ 53,041.76	HOUSTON	Lori Sheldt 03/30/2023 7:20 am
<input type="checkbox"/>	Billing Batch	25574	2023-01	01/31/2023	411	766 Fix Errors	\$ 9,022.89	DAYTON	Lori Sheldt 04/12/2023 11:01 am
<input type="checkbox"/>	Billing Batch	25576	2023-01	01/01/2023	8	9 Fix Errors	\$ 152.39	DAYTON	David Navarro 03/30/2023 1:00 pm
<input type="checkbox"/>	Billing Batch	25636	2023-01	01/31/2023	16	30 Fix Errors	\$ 532.82	DAYTON	David Navarro 05/18/2023 2:23 pm
<input type="checkbox"/>	Billing Batch	25712	2023-01	01/01/2023	53	106 Fix Errors	\$ 7,711.03	QAWASTE	Paul Gonzalez 10/13/2023 2:26 pm
<input type="checkbox"/>	Payment	10798	2023-01	01/16/2023	1	1 Fix Errors	\$ 750.00	CORPUS	Isabel Navarro 01/19/2023 10:54 pm
<input type="checkbox"/>	Adjustment	10801	2023-01	01/30/2023	1		\$ (250.00)	DAYTON	Matthew Van Doren 01/30/2023 10:11 am
<input type="checkbox"/>	Payment Transfer	10848	2023-01	01/11/2023	1	1 Fix Errors	\$ 880.77	DAYTON	Lori Sheldt 03/09/2023 12:24 pm

FIX SELECTED ERRORS

CREATE GL BATCH

CREATE INDIVIDUAL GL BATCHES

Last Updated: 05/13 3:02 pm

Pathway: Accounting > GL Transaction Processing

# Reports

## Sales Results Net New (Reports) - Site Counts Added to the Controllable and Non Controllable Columns (16706) [New Feature]

An enhancement has been made to add total site counts under the Controllable and Non Controllable column in the Sales Result Net New screen.

SALES RESULTS NET NEW

REPORTS > ANALYSIS > SALES RESULTS NET NEW

RANGE

PERIOD

BASED ON

DIVISION

LINE OF BUSINESS

SALES RESULT DETAILS

SALES RESULT

GROUP BY

	NEW	INCREASES	GROSS TOTAL	CONTROLLABLE	NON-CONTROLLABLE	DECREASES	NET TOTAL	TEMP / SEASONAL	1085
	\$ 414.14 3 (3 Sites)	\$ 0.00 0 (0 Sites)	\$ 414.14	\$(90.00) 1(1 Sites)	\$(324.14) 2(2 Sites)	\$ 0.00 0 (0 Sites)	\$ 0.00	\$ 0.00 0 (0 Sites)	0%
David Jones	\$ 0.00 1 (1 Sites)	\$ 0.00 0 (0 Sites)	\$ 0.00	\$ 0.00 0(0 Sites)	\$ 0.00 0(0 Sites)	\$ 0.00 0 (0 Sites)	\$ 0.00	\$ 0.00 0 (0 Sites)	N/A
Alex Summers	\$ 183.42 4 (4 Sites)	\$ 0.00 0 (0 Sites)	\$ 183.42	\$ 0.00 0(0 Sites)	\$ 0.00 0(0 Sites)	\$ 0.00 0 (0 Sites)	\$ 183.42	\$ 0.00 1 (1 Sites)	N/A
Dave Brown	\$ 50.00 1 (1 Sites)	\$ 0.00 0 (0 Sites)	\$ 50.00	\$ 0.00 0(0 Sites)	\$(450.00) 1(1 Sites)	\$ 0.00 0 (0 Sites)	\$(400.00)	\$ 0.00 0 (0 Sites)	0%
Paul Green	\$ 0.00 1 (1 Sites)	\$ 0.00 0 (0 Sites)	\$ 0.00	\$ 0.00 0(0 Sites)	\$ 0.00 0(0 Sites)	\$ 0.00 0 (0 Sites)	\$ 0.00	\$ 0.00 0 (0 Sites)	N/A
House Account	\$ 365.23 5 (4 Sites)	\$ 37.61 8 (3 Sites)	\$ 402.84	\$ 0.00 0(0 Sites)	\$ 0.00 0(0 Sites)	\$ 0.00 0 (0 Sites)	\$ 402.84	\$ 0.00 0 (0 Sites)	7.7014%
House Acct non System	\$ 25.00 3 (3 Sites)	\$ 85.00 4 (4 Sites)	\$ 110.00	\$ 0.00 0(0 Sites)	\$ 0.00 0(0 Sites)	\$ 0.00 1 (1 Sites)	\$ 110.00	\$ 0.00 0 (0 Sites)	N/A
Sierra Gordon	\$ 0.00 0 (0 Sites)	\$ 5.00 1 (1 Sites)	\$ 5.00	\$ 0.00 0(0 Sites)	\$ 0.00 0(0 Sites)	\$ 0.00 0 (0 Sites)	\$ 5.00	\$ 0.00 0 (0 Sites)	N/A
Natalia Peters	\$ 0.00 0 (0 Sites)	\$ 15.00 3 (3 Sites)	\$ 15.00	\$ 0.00 0(0 Sites)	\$ 0.00 0(0 Sites)	\$ 0.00 0 (0 Sites)	\$ 15.00	\$ 0.00 0 (0 Sites)	N/A
Megan Nathan	\$ 0.00 0 (0 Sites)	\$ 5.00 1 (1 Sites)	\$ 5.00	\$ 0.00 0(0 Sites)	\$ 0.00 0(0 Sites)	\$ 0.00 0 (0 Sites)	\$ 5.00	\$ 0.00 0 (0 Sites)	N/A
Matt Lori	\$ 0.00 0 (0 Sites)	\$ 50.00 1 (1 Sites)	\$ 50.00	\$ 0.00 0(0 Sites)	\$ 0.00 0(0 Sites)	\$ 0.00 0 (0 Sites)	\$ 50.00	\$ 0.00 0 (0 Sites)	N/A
Total	\$ 1,037.79 18	\$ 197.61 18	\$ 1,235.40 0%	\$(90.00) 1	\$(774.14) 3	\$ 0.00 1	\$ 371.26 0%	\$ 0.00 1	2.1609%

Pathway: Reports > Analysis > Sales Results Net New

# Setup

## Account Class (Setup) - New 'Enable Duplicate Account and Site Check' Field Added (16529)[New Feature]

A new setting field 'Enable Duplicate Account and Site Check' has been added to the Details tab in Account Class Setup. The following logic applies to the selection options:

- Yes: Enables the account/site creation duplication check. This is also the default setting for the field.
- No: Disables the account/site creation duplication check.



UPDATE ACCOUNT CLASS			
Details	Customer Portal	Payment Processing	Finance Charges / Late Fees
NAME	COMMERCIAL	CREATE CONTACT DEFAULT	Account
ACTIVE	Yes	DEFAULT CONTACT SERVICE NOTIFICATION	Yes
TYPE	Business	GEOCODING TYPE	Roof Top
GL ACCOUNT	Accounts Receivable	GEOFENCE RADIUS (METERS)	30
GL SEGMENT	12000	NEW ACCOUNT NOTIFICATION TEMPLATE	116
DEPOSIT GL ACCOUNT	CNB Bank Account	REQUIRE GENERATOR TYPE	No
DEPOSIT GL SEGMENT	14000	ENABLE LINKING CONTACTS TO ALL SITES	Yes
DEFAULT ACCOUNT CREDIT LIMIT	500	LOAD ACTIVE ACCOUNTS IN PIPELINE MAP	Yes
DEFAULT ACCOUNT TERM	Net 20	REQUIRE BILLING CONTACT	No
DEFAULT REBATE PAYMENT TYPE	ACH	EXCLUDE FROM NAVU SALES	No
DEFAULT BILL BY SITE	No	ENABLE DUPLICATE ACCOUNT AND SITE CHECK	Yes
GENERATE NEW SAP ACCOUNT ID	No	HIDE RATE ON WORK ORDER FORMAT	<input type="checkbox"/>

Pathway: Setup > Account > Account Class

## Account Class (Setup) - Updates to Finance Charges / Late Fees (16821, 16831, 16823)[New Feature]

### Setup of Insufficient Fund Fee and Credit Hold Placement Fee

Pathway: Setup > Account > Account Class

The following changes have been applied to the Finance Charges and Other Fees tab in Add/Edit Account Class:

- Previously, this tab was called 'Finance Charges \ Late Fees' and was renamed to 'Finance Charges and Other Fees'
- 4 new fields have been added:
  - Insufficient Funds Fee
    - Default setting is '0'.
  - Insufficient Funds Fee Charge Code
    - Becomes a required field if a value greater than '0' is entered in the Insufficient Funds Fee field.
  - Credit Hold Placement Fee
    - Default setting is '0'.
  - Credit Hold Placement Fee Charge Code
    - Becomes a required field if a value greater than '0' is entered in the Credit Hold Placement Fee Charge Code.



ACCOUNT CLASS SETUP							
ID	NAME	DEFAULT ACCOUNT CREDIT LIMIT	DEFAULT ACCOUNT TERM	DEFAULT REBATE PAYMENT TYPE	DEFAULT BILL BY SITE	GL SEGMENT	GL ACCOUNT
1000	RESIDENTIAL						
1001	COMMERCIAL						
1002	ROLL OFF-TEMP						
1003	ROLL OFF-PERM						
1004	BROKER						
1005	GOVERNMENT						
1006	MUNICIPAL						
1007	HOA						
1008	VENDOR						
1009	TRANSFER WO						
1010	SCALE						
1011	FINANCELATEFEE						
1012	FINTTEST						
1013	MEDICAL						
1014	TEMP						
1015	test						
1016	test2						
1017	AUTOCH						

ADD ACCOUNT CLASS

Details

Customer Portal

Payment Processing

Status Management

Finance Charges and Other Fees

FINANCE CHARGE TYPE

ANNUAL RATE

CHARGE CODE

CHARGE MINIMUM

PAST DUE MINIMUM

INSUFFICIENT FUNDS FEE

INSUFFICIENT FUNDS FEE CHARGE CODE

CREDIT HOLD PLACEMENT FEE

CREDIT HOLD PLACEMENT FEE CHARGE CODE

During Billing

0.00

0.00

10.00

0.00

0.00

SAVE

## Application of Insufficient Funds Fee in AR History

**(Only applies to Payment Reversals and Charge Backs. Transfers and Split Payments are Excluded.)**

**Pathway:** Customer Service Screen > AR History

If a payment reversal, or charge back is recorded for a payment, and the account class includes a insufficient funds fee and charge code settings, a manual charge is created for the account. For this, the following logic is used:

- Insufficient Funds Fee must include a value greater than '0'.
- Insufficient Funds Fee Charge Code must exist.

By default, the 'Apply Insufficient Funds Fee' check box is checked. The full fee is applied regardless if the reversal or charge back was for a partial amount.

PAYMENT REVERSAL / TRANSFER / SPLIT

05/03/2022

43358 - 888 CHINESE RESTAURANT

Check # 11858967

\$ 595.51

REVERSAL TYPE

Reverse Payment

REVERSAL DATE

05/03/2022

☒

APPLY INSUFFICIENT FUNDS FEE

\$ 15.00

NOTE

Reverse Payment

POST

## Application of Credit Hold Placement Fee in Customer Service

(Only applies to automated credit holds)

Pathway: Setup > Account > Account Class

If an account qualifies for an automated credit hold, and the account class includes a credit hold placement fee and charge code, a manual charge will be created when the account is placed on "Credit Hold." For this, the following logic is used:

- Credit Hold Placement Fee must include a value be greater than '0'
- Credit Hold Placement Fee Charge Code must exist.
- The account class to which the account belongs must have the necessary auto credit hold settings enabled and defined in the Status Management tab.

The screenshot displays the 'Cabra Los Angeles' account (49044) and its details. The account is currently on 'Credit Hold'. The 'PENDING' section shows a credit hold placement fee of \$18.00, dated 05/17/2024. The 'ACTIVE SERVICES' table lists two services: '3 Yard Trash Service' (C3F0) and '30 Yard Open Top Service - MSW' (99D4). The 'CALENDAR' view shows the month of May 2024, with a red arrow pointing to the 'Credit Hold Placement Fee' entry on May 17.

QTY	SERVICE CODE	SERVICE ID	FREQUENCY	SCHEDULE	PER UNIT RATE	RATE	W/O MIN.	START DATE	END DATE	CONTRACT EXP.
2	3 Yard Trash Service	C3F0	1x per week		\$ 100.00	\$ 200.00 per month		02/13/24		
1	30 Yard Open Top Service - MSW	99D4	5x per week	M,T,W,H,F	\$ 0.00	\$ 0.00 per month		04/01/24		

## Account Request Type/Account Request Management - Department Field Added and Field Name Change (16681) [Enhancement]

The following changes have been applied to the Account Request Type Setup screen and Account Request Management screen:

### Account Request Type

The following changes have been applied in Account Request Type Setup screen:

1. 'Assign to Default' has been renamed to 'Assign User By Default'
2. A 'Department' field has been added

EDIT ACCOUNT REQUEST TYPE

NAME

Please call me

TYPE

Other

ACTIVE

Yes

ALLOW SELF-SERVICE ORDERING

No

1

ASSIGN USER BY DEFAULT

Account Manager

2

DEPARTMENT

Admin

Pathway: Setup > Accounts > Account Request Type

## Account Request Management

Within the Account Request Management screen, a Department filter option has been added to further limit what requests a user would like to see displayed on the screen.

ACCOUNT REQUEST MANAGEMENT								
ACCOUNTS > ACCOUNT REQUEST MANAGEMENT								
DIVISION	DEPARTMENT	ASSIGNED TO	TYPE	STATUS				
All	All	All	All	Not Completed				
ID	TYPE	ASSIGNED TO	DATE	ACCOUNT/ SITE	CONTACT	NOTE	STATUS	
1501	Missed Pick Up	Lori Sheldt	Wed 04/23/25 01:04 pm	26521 LIBERTY COUNTY PRECINCT #3 / 26521001 LIBERTY COUNTY PRECINCT #3	LIBERTY COUNTY PRECINCT #3	reassigned b y Lori	Hold	
1502	Customer Request	Lori Sheldt	Thu 05/04/23 06:05 am	48910 Liberty Hospital / 48910001 Liberty Site	Lori	added on portal	Open	
1503	Customer Request	Lori Sheldt	Thu 05/04/23 06:05 am	48910 Liberty Hospital / 48910001 Liberty Site	Lori	added on portal	Open	
1504	Customer Request	Lori Sheldt	Thu 05/04/23 06:05 am	48910 Liberty Hospital / 48910001 Liberty Site	Lori	on portal - 3rd time	Open	
1505	Customer Request	Lori Sheldt	Thu 05/04/23 06:05 am	48910 Liberty Hospital / 48910001 Liberty Site	Lori	adding with me as salesperson	Open	

Pathway: Accounts > Account Request Manager

## Notification Template (Setup)- New Template Added (16820)[New Feature]

A new notification template 'Account Request Notification' has been added as an option to the Type drop down. The Account Request Notification is sent to contacts who have their Account Request Notification setting set to 'Email' or 'Text Message' when a customer request is entered either in Navusoft or the Customer Portal.

ADD NOTIFICATION TEMPLATE

TYPE

Account Notification

Account Request Notification

Account Statement

Automatic Payment Change

Contact Form

Credit Card Expiration

Credit Memo

Customer Portal Notification

Future Services Calendar

Invoice

NavuSales iOS

New On Call Order

Online Order

NAME

ACTIVE

Yes

Em

CONTENT TYPE

text/html

DEFAUI

DEFAUI

PREVIEW

KEY PATHS

Search

SAVE

Pathway: Setup > System > Notification Template

### Bill Group Setup - Logic Changed To Minimum Invoice Amount Field (16843)

The logic for the Minimum Invoice Amount field has been updated to trigger a past due notification if an individual invoice is past due by the specified amount. Previously, the system considered the total Accounts Receivable (AR) Aging for a site to determine when to send a past due notification.

UPDATE BILL GROUP

Settings

Notifications

NOTIFICATION TEMPLATE (INVOICE AS LINK)	Invoice Link (All Divisions)	
NOTIFICATION TEMPLATE (INVOICE AS ATTACHMENT)	Invoice-Attmnt (All Divisions)	
INVOICE DUE REMINDER TEMPLATE	Invoice Due Reminder	DAYS 5
UNREAD INVOICE REMINDER TEMPLATE	Unread Invoice Reminder	DAYS 7
STATEMENT NOTIFICATION TEMPLATE	Statement	
PAST DUE EMAIL FROM	pastdue@navusoft.com	MINIMUM INVOICE AMOUNT 500
PAST DUE NOTICE 1 NOTIFICATION TEMPLATE	Past Due 1	DAYS 30
PAST DUE NOTICE 2 NOTIFICATION TEMPLATE	Past Due 2	DAYS 60
PAST DUE NOTICE 3 NOTIFICATION TEMPLATE	Past Due 3	DAYS 90
PAST DUE NOTICE 4 NOTIFICATION TEMPLATE		DAYS 120
PAST DUE NOTIFICATION MESSAGE		

Saved.

Pathway: Setup > Accounting > Bill Group

### System Options Setup (Setup) - New Setting Added to Account Tab (16911)[New Feature]

A new setting option 'Account and Site Division Must Match' was added in System Options Setup and when enabled, will require newly created accounts and sites to have the same division.

SYSTEM OPTIONS SETUP
SETUP > SYSTEM > SYSTEM OPTIONS

System
Sales
Integration
Account
Operations
Customer Portal
Broker
Online Order

THRESHOLD DISCOUNT LAB TEST ID		CREDIT HOLD NOTIFICATION TEMPLATE	
API GRAVITY LAB TEST ID		ENABLE ONLINE SIGNATURE MESSAGING	No
SPECIFIC GRAVITY LAB TEST ID		LIMIT PAYMENT BATCH TO SINGLE DIVISION	No
ENABLE SITE BILLING ADDRESS	Yes	LIMIT BILL GROUP TO SINGLE DIVISION	No
ENABLE SITE BILL GROUP	Yes	ACCOUNT AND SITE DIVISION MUST MATCH	Yes
ENABLE AGING BY SITE	No	SMS DEFAULT TASK TYPE	Customer Support
SERVICES GRID DEFAULT VIEW	Standard	SMS UNKNOWN USER RESPONSE	
DEFAULT GENERATOR TYPE	Not Applicable		
CREDIT HOLD REASON CODE	Credit Hold		
VACATION HOLD REASON CODE	Vacation Hold		
AUDITOR ACCOUNT LABEL	Collection Agent		
WRITE OFF CHARGE CODE			
REQUIRE SITE SOURCE	No		

Pathway: Setup > System > System Options > Account (Tab)

## Division Setup (Setup) - New Field Added for Invoice Adjustments (16834)[New Feature]

In Division Setup, an optional setting field 'Adjustment Amount Requiring Two Approvals' has been added. If a value is entered for this setting, a secondary approval will be required for invoice adjustments that exceed that amount. Approvals are completed on the Invoice Adjustment - Pending Approval and History screen.

DIVISION SETUP

SETUP > SYSTEM > DIVISION

+

DIVISION

Select Division

Details

Credit Card / ACH Processing

Cost / Target Pricing

Inter-company

DIVISION ID

NAME

Legal Address

NAME

ADDRESS LINE 1

ADDRESS LINE 2

CITY

STATE

POSTAL CODE

MAIN PHONE

TOLL FREE PHONE

FAX

EMAIL

TIME ZONE

SERVICE NOTIFICATION FROM EMAIL

DIVISION GROUP

EPA ID

GL SEGMENT

EXTERNAL DB ID

ERP LABEL

DEFAULT ERP ACCOUNT ID

NOTE

LOGO URL

Bill Remit Address

NAME

ADDRESS LINE 1

ADDRESS LINE 2

CITY

STATE

POSTAL CODE

AUTO PROCESS SERVICE CHANGES

ENABLE INTEGRATION

LOCK BOX IMPORT FORMAT

LOCK BOX NON-MATCHING ACCOUNT

CUSTOMER PORTAL URL

CUSTOMER PORTAL PAST DUE TEXT

MAILCHIMP API KEY

MAILCHIMP LIST ID

SMS TASK DEFAULT USER

RO DISPOSAL REV %

CAMERA EXTERNAL ID

ACCOUNT CUSTOM SETTINGS CLASS

SITE CUSTOM SETTINGS CLASS

EXCLUDE FROM NAVU SALES

ADJUSTMENT AMOUNT REQUIRING 2 APPROVALS

Pathway: Setup > System > Division

## Database

### Notification History and Block List (Database) - Label Renamed (16867)

The Notification History screen has been renamed to 'Notification History and Block List.'

HOME

ACCOUNTS

SALES

OPERATIONS

ACCOUNTING

REPORTS

DASHBOARD

SETUP

DATABASE

Bulk Update

Database Query

Import

Merge Sites

Notification History and Block List

ReCollect Data Export

Request Audit

Send Alert Notification

Send Bulk Customer Portal Invites

Send Bulk Emails

User Data Transfer

Feb 12 9:00 am test

4:48 pm

Wed 05/22/24

3:15 am

Tue 05/21/24

11:40 am

11:23 am

3:53 am

3:51 am

3:50 am

3:50 am

3:48 am

3:48 am

3:47 am

3:47 am

Mon 05/20/24

12:13 pm

Wed 05/15/24

12:20 pm

9:49 am

Tue 05/14/24

3:05 pm

Mon 05/13/24

2:19 am

Fri 05/10/24

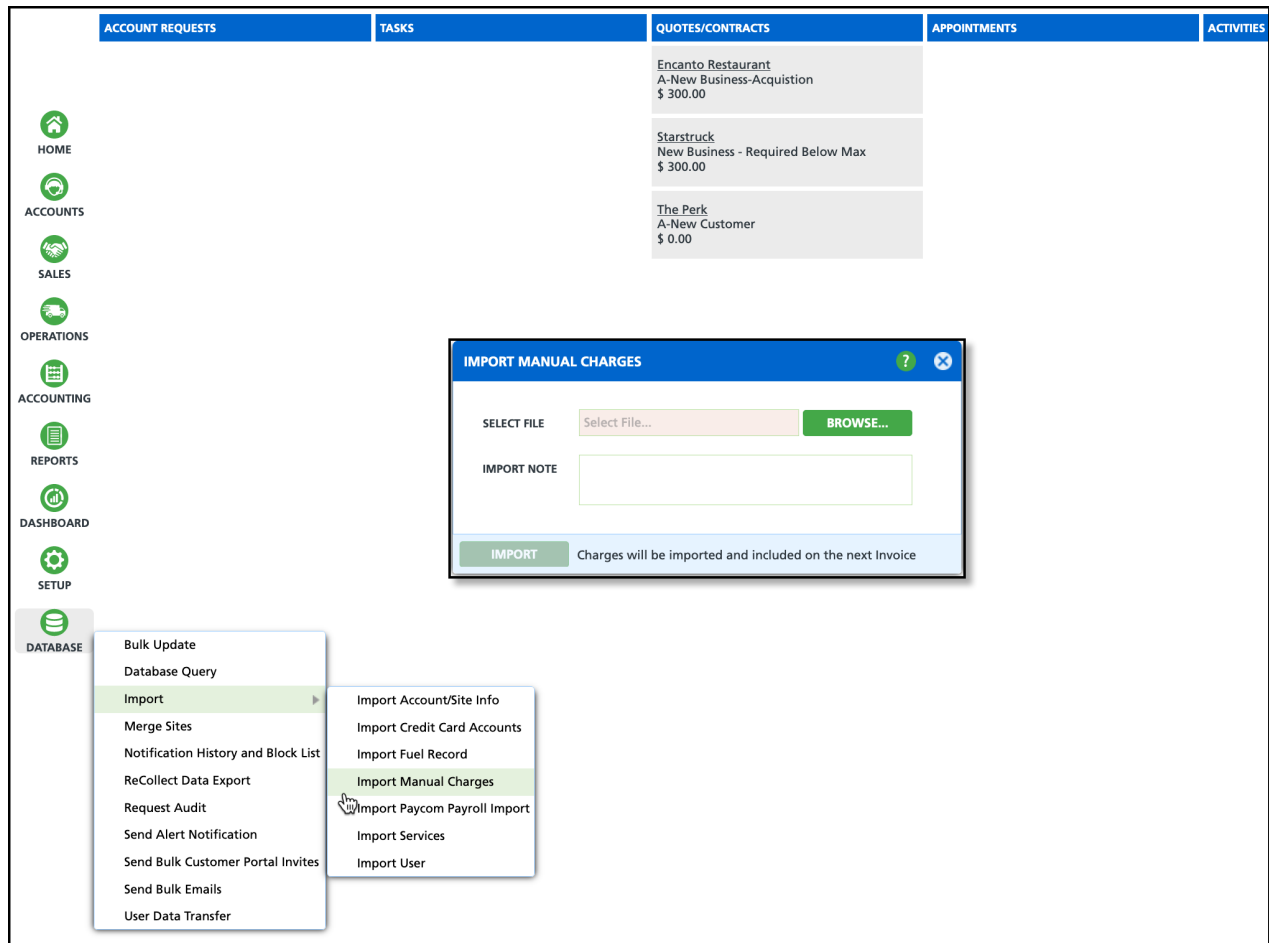
10:34 am

10:34 am

Pathway: Database > Notification History And Block List

## Import Manual Charges (Database) - New Menu Option Added to Import (16825)[New Feature]

A new import feature 'Import Manual Charges' has been added to the Import menu in the Database module. The Import Manual Charges feature provides users a method of importing a large amount of manual charges across multiple sites. Once imported, charges are included on the next invoice. For further information including file format requirements, review the Import Manual Charges article [here](#).



Pathway: Database > Import > Import Manual Charges

## Import Fuel Record (Database) - File Format Logic Updated to 'Import Fuel Record' (16871)

The following modifications have been applied to the Import Fuel Record file format requirements:

- **Truck Name** or **Truck ID** are supported in the first column
- Three formats of **Date** are supported in the second column- YYYY-MM-DD / MM/DD/YY / MM/DD/YYYY
- Added ability to view import results in case of any failures

Modifications to the import logic have resolved an error where the system falsely indicated a successful import even though no records were actually imported.



**IMPORT FUEL RECORD**

SELECT FILE

**APPOINTMENTS**

Date	Time	Location	Alerts
Today	2:27 am to 2:27 am	0 Alerts	
Fri 05/31/24	1:48 am to 11:26 am	0 Alerts	
11:26 am	Site Viewed	DOCTOR	
11:06 am	Site Viewed	Example	
1:48 am	Site Viewed	LIBERTY	
Thu 05/30/24	12:12 pm to 10:36 pm	0 Alerts	
10:36 pm	Site Viewed	Example	
10:36 pm	Site Viewed	Example	
10:32 pm	Site Viewed	Example	
10:31 pm	Site Viewed	Example	
12:12 pm	Site Viewed	DOCTOR	
Wed 05/29/24	2:59 pm to 2:59 pm	0 Alerts	
2:59 pm	Site Viewed	DOCTOR	
Tue 05/28/24	12:23 pm to 12:23 pm	0 Alerts	
12:23 pm	Site Viewed	Example	
Thu 05/23/24	4:48 pm to 4:49 pm	0 Alerts	
4:49 pm	Site Viewed	Example	
4:48 pm	Site Viewed	QA Wast	
Wed 05/22/24	3:15 am to 3:15 am	0 Alerts	
3:15 am	Site Viewed	Example	
Tue 05/21/24	3:47 am to 11:40 am	0 Alerts	

Pathway: Database > Import > Fuel Records

## Database Query (Database) - Fields Added To Display Fields List (16927)

An enhancement has been made to add new fields to the Active Services Query selections. The following fields were added: Vendor Name, Vendor Rate, and Vendor Site ID.

**Database Query**

SAVED QUERY

**ENTITIES**

Active Services  **LIMIT / SORT**

ROW LIMIT   **DISPLAY FIELDS**

☒ Display Only Selected

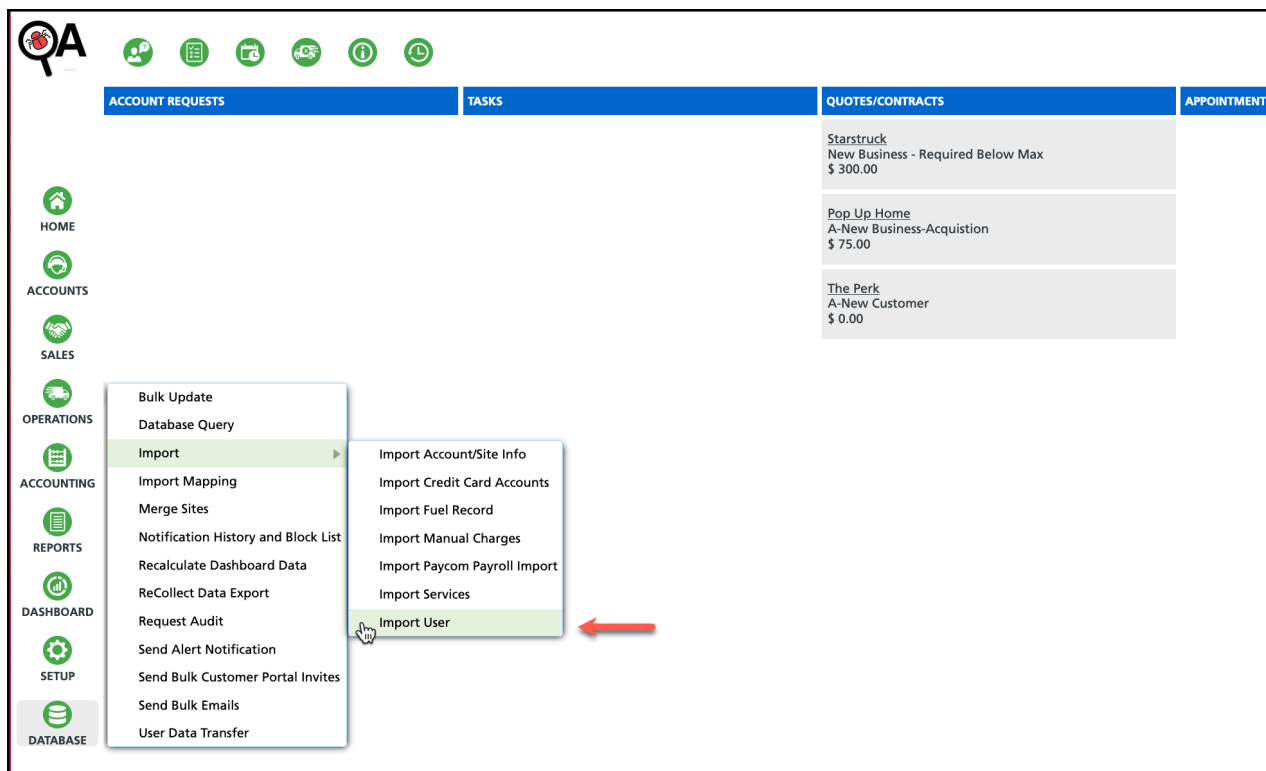
ENTITY	SEQ	FIELD	ALIAS	DESCRIPTION
<input checked="" type="checkbox"/> Active Services	1	Vendor Rate		
<input checked="" type="checkbox"/> Active Services	2	Vendor Site Id		
<input checked="" type="checkbox"/> Active Services	3	Vendor Name		

**FILTERS**

Pathway: Database > Database Query

## Import User (Database) - New Import Feature Available (16879)[New Feature]

A new Import User option has been added to the Import tool in the Database module. Review the documentation linked to this article for file format requirements and other logic.

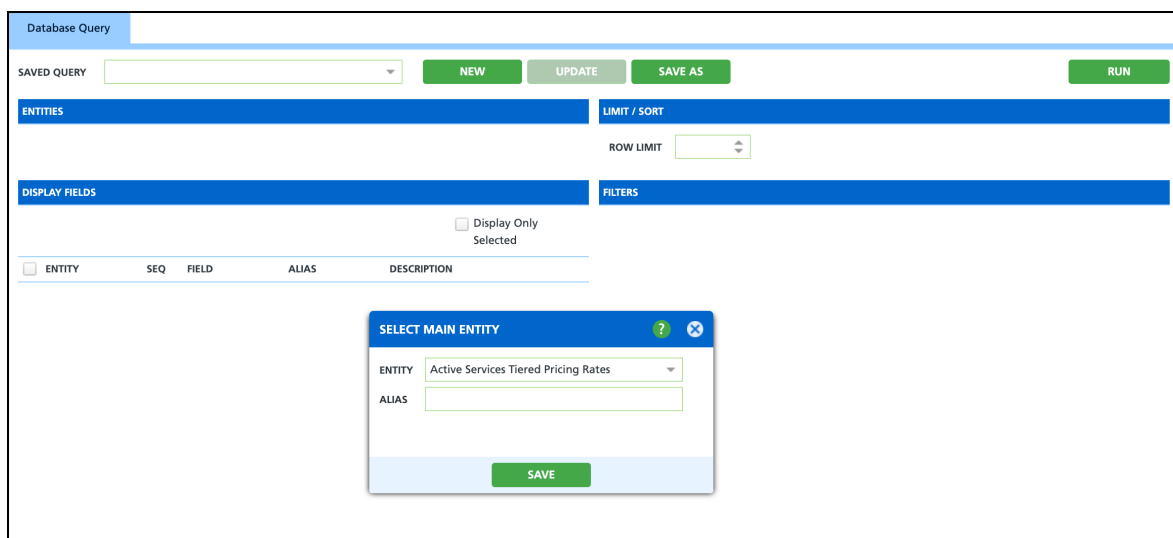


Pathway: Database > Import > Import User

Article: [Import User](#)

## Database Query (Database) - New Entity Added to Main Entity Options (16957)

In Database Query, 'Active Services Tiered Pricing Rates' has been added as an option in the Entity drop down.



Pathway: Database > Database Query

## Customer Portal

### Customer Portal - 'Closed' Status Updated in Request History (16601)

When a system user in Navusoft closes a request, the status on the Customer Request History screen in the customer portal is updated to show "Closed." Previously, it displayed as "Closed - Not Chargeable."

Customer Request History						
ID	DATE	TYPE	DESCRIPTION	STATUS	RESOLUTION TIME	
1535	02/19/2024 3:19 pm	Customer Request	Test	Closed	04/26/2024	

Pathway: Customer Portal

## Customer Portal - Updates to Requests Tab (16816)[New Feature]

The following screen improvements have been applied to the Customer Portal:

- Requests Tab Changes:**
  - (1) Add icon relocated to the left of the Completion filter
  - (2) Completion filter options have been improved to match the filter options in the Account Request Management tool in Navusoft.
- Service Map Tab Changes:**
  - (3) Scheduled Date and Service Code fields have been relocated to the left of the screen.
  - (4) The Excel icon has been relocated to the right side of the screen and a Refresh icon has been added.
- Disposal Tickets Tab Changes (picture not shown):**
  - Excel and Refresh icon have been resized

SELECT ACCOUNT 1 of 15

21638 BIG STATE

Accounts Receivable

Service Map

Service Exceptions

Requests

Disposal Tickets

1 Filter

2

Completed in Last 7 Days

Not Completed

Completed in Last 7 Days

Completed in Last 30 Days

Completed in Last 90 Days

Completed in Date Range

ID	DATE	TYPE	DESCRIPTION	RESOLUTION	NAME	ADDRESS
1551	05/14/2024	Customer Request	Testing NAVU-1...	05/14/2024	21638001 BIG STATE	12911 Farm to Market ...

SELECT ACCOUNT 1 of 15

21638 BIG STATE

Accounts Receivable

Service Map

Service Exceptions

Requests

Disposal Tickets

Scheduled Date

05/15/2024

Service Code

All

3

4

Map

Jersey Village

ACRES HOME

HOUSTON HEIGHTS

HOUSTON

SHeldon

Barrett

Highlands

Lynchburg

## Customer Portal - Service Exceptions Tab Added to Services Map and Requests View (16815)[New Feature]

Customer Portal accounts with their homepage set to the Services Map and Requests view have been updated to include a Service Exceptions tab. This tab will only display service records with a 'Not Serviced' work status.

**SELECT ACCOUNT** 1 of 16

18557 CITY OF LIBERTY

**Accounts Receivable** **Service Map** **Service Exceptions** **Requests** **Disposal Tickets**

Scheduled Date: 06/26/2024 Service Code: All

DATE	WO#	NAME	ADDRESS	SERVICE CODE	EXCEPTION RE...	EXCEPTION	PHOTOS
06/26/24	8066085	CITY OF LIBERTY	423 COUNTY ROA...	18 Gal Recycle	No Trash Out		0

**EDIT SERVICE RECORD**

CITY OF LIBERTY  
ATTN: ACCOUNTS PAYABLE  
123 COUNTY ROAD 6763  
DAYTON, TX 77535

WORK ORDER: 8066085 QTY: 1 SERVICE CODE: 18 Gal Recycle EQUIPMENT: 18GAL-REC WORK TYPE: RS\_EXTRAPU ORDER TYPE: On Call MATERIAL: REC

ORDER NOTES

CREATED BY: Aliena Somers on 6/26/24 8:44 am  
ORDER REASON:

PO NUMBER: EXTERNAL ID:

SCHEDULED DATE: 06/26/24 Wednesday ROUTE: DAY 108 SEQUENCE: 0 DESTINATION / ORIGIN:

WORK STATUS: Not Serviced EXCEPTION REASON: No Trash Out POSTING STATUS: Pending

Charges Payments Completion Attachments Labels Photos Timeline

☐ 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
-----------	--------	---------------	------------	-----	-------------	----------	-------------	--------------	---------	-------

Pathway: Customer Portal

## Customer Portal (User Security) - Disabling/Restricting Access to Customer Portal For Inactive Contacts (16861)

Multiple enhancements have been applied to the Contacts screen, Edit Contact and Edit Portal User screens, and Customer Portal access.

### Contacts Screen

The following enhancement has been made to the Contacts screen:

- A Request Notification column has been added to display the contact's preferred notification method.

CONTACTS								
TYPE	BILLING CONTACT	NAME	TITLE	EMAIL	PHONE	SERVICE NOTIFICATION	REQUEST NOTIFICATION	PORTAL USER
Site	None	Aliena		aliena@fa...		Email	Email	No

### Edit Contact Screen

The following change was made to the Edit Contacts screen:

- 1. 'Enable Portal Access' was added as a checkbox option.
- 2. In the Edit Portal User popup window, the Active checkbox was renamed to 'Login Enabled.'
- 3. Not pictured: 'Notify By Email' and 'Notify By Text Message' boxes were removed from the Edit Portal User popup window.

EDIT CONTACT

Details

Customer Portal Access

Tags

History (1)

TITLE

NAME

EMAIL

EMAIL 2

PHONE 1

PHONE 2

PHONE 3

PHONE 4

NOTE

RECEIVE SERVICE NOTIFICATIONS

SERVICE NOTIFICATION METHOD

REQUEST NOTIFICATION METHOD

MOBILE OPT OUT?

ENABLE PORTAL ACCESS

PORTAL USER

Aliena

aliena@FakeEmail.com

(999) 999-9999

(999) 999-9999

(999) 999-9999

(999) 999-9999

Yes

Email

Email

Portal UserId 16746, Last Login Jun 26,2024 08:45 am

EDIT PORTAL USER

Details

Login History

ID

16746 aliena@FakeEmail.com

Created Mar 21,2023 11:02 am

LAST LOGIN

Jun 26,2024 08:45 am

LOGIN ENABLED

PHONE

MOBILE

SAVE

### Customer Portal

Logic for user portal access has been improved. Users will be denied access to accounts and sites unless both 'Enable Portal Access' on the Contacts screen and 'Login Enabled' on the Edit Portal User popup window are checked.

SELECT ACCOUNT

SELECT SERVICE LOCATION

TEST MESSAGE TESTING

Error

You do not have access to any accounts.

OK

## Customer Portal - Success Message Updated (16901)

In the Customer Portal, after a work order has been successfully created, the Success popup has been updated to display the Work Order number.

SELECT ACCOUNT1 of 28

46536 ROADRUNNER RECYCLING

TEST MESSAGE TESTING

\$ 4,382.11

TOTAL DUE

\$ 4,382.11

PAST DUE

DAY Portal Div Past Due Text

\$

Make a Payment

Last Payment: 11-14-2022 - ACH 11142022 \$ 190.52

Invoice History

Manage Auto Pay

\$

Wallet

SELECT SERVICE LOCATION1 of 1

46536001 WS COATINGS INC 5233 Schurmier Road, Houston TX

CURRENT SERVICES	FREQUENCY	NEXT SCHEDULED
1 - 8 Yard Trash Service	2x per week	Thu June 27th
1 - 8 Yard Trash Service	2x per week	Thu June 27th
1 - 2 YD No Work Class	1x per week	Thu June 27th

PRINT CALENDAR

RECENT SERVICES	ID	SERVICE
Wed Jun 26, 2...	8065404	8 Yard Trash Service
Thu Apr 18, 2...	7522879 (In Progress)	8 Yard Trash Service
	73766 (In Progress)	8 Yard Trash Service
	74543 (Completed)	8 Yard Trash Service
	40932 (Completed)	8 Yard Trash Service

VIEW PREVIOUS AND FUTURE SERVICES

Success

Order 6929518 has been created.

OK

Pathway: Customer Portal > Create Work Order