

Release Version 73 [Archive]

Last Modified on 04/09/2026 4:39 am PDT



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

Expand All Sections

Collapse All Sections

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	Not Started, In Progress		TASK STATUS	Not Started, In Progress, Coi		RECYCLE		
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	
<ul style="list-style-type: none"> • Documentation/Recording Review (30 min) • Pre-Training DB Prep/Post-Training FLUs Script (180) • Recurring Implementation Team Check-In (30 min) 				

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										
DIVISION		PRIORITY	TASKS	USER	TYPE		SHOW CLOSED (30 DAYS)			
QAWASTE		All	User Tasks	All	All		PAST DUE	0	COUNT	0
PRIORITY	STATUS	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.

DOCUMENT TYPE SETUP

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-noPreAuth/Auto 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 Sd					
48	Chg Sd					
60	Chg Sd					
78	Chg Sd					
79	Chg Sd					
80	Chg Sd					
81	Chg Sd					
82	Chg Sd					
83	Chg Sd					
84	Chg Sd					
85	Chg Sd					
86	Chg Sd					
87	End Sd					
88	A-Cha					
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-PI 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

EDIT SERVICE

SITE: Encanto Restaurant (Active) 2121 Hillhurst Ave

QTY: 3, EQUIPMENT: 2 Yard FL, SERVICE CODE: 2 Yard Trash Service, FREQUENCY: 1x per week, PER UNIT: 94.0000, SERVICE FEES: 282.00 month

Rate is discounted 6% from the default rate of \$ 300.00. Your discount limit is 5%, this may require authorization.

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.

AR HISTORY

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

Limit to open items | STATEMENT | INVOICE | AUTO APPLY | BALANCE WRITE OFF | PAYMENT METHODS (2) | 1111 RECENTLY EXPIRED 4444 EXPIRES WITHIN 90 DAYS

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

RECORD CHARGEBACK

POSTING DATE: [Calendar icon]

AMOUNT: 45.00

NOTE: [Text area]

SAVE

Pathway: Accounts > AR History

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

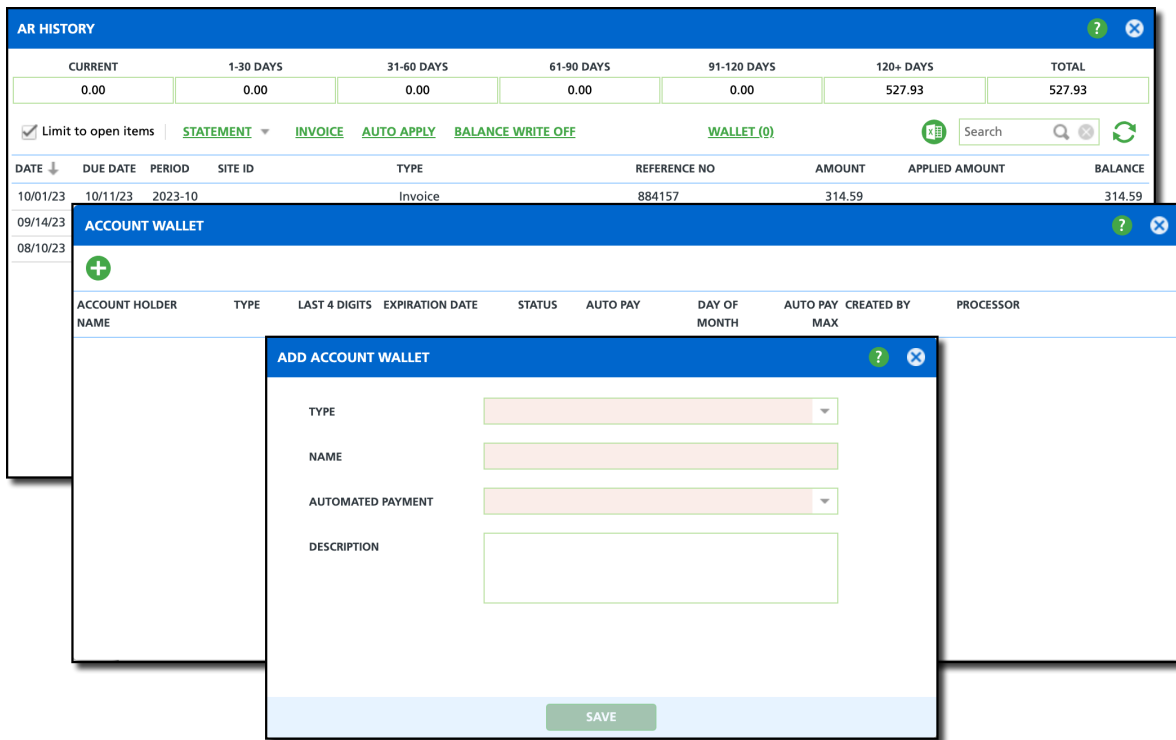
The following changes have been applied to the Create Invoice screen and the permission it includes:

- 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.'

SITE ID	START DATE	END DATE	GROSS QTY	NO CHARGE QTY	NAME	PO #	AMOUNT	SURCHARGES	TAXES	TOTAL	
							Total	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00

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

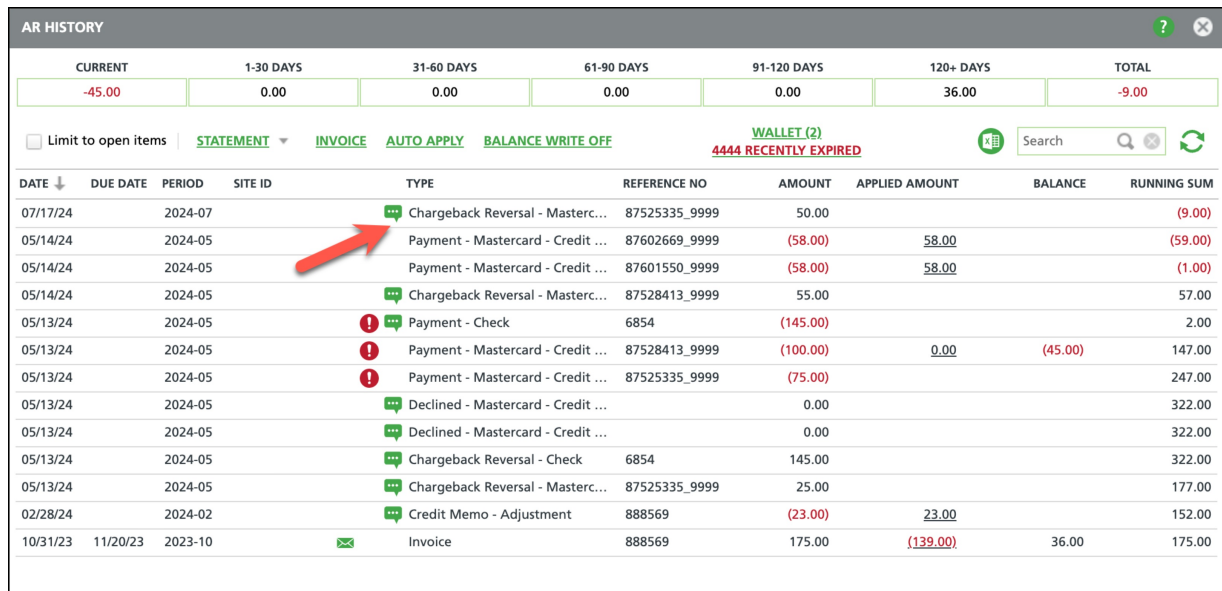
The "Payment Methods" section within an account's AR History screen has been renamed to "Wallet." This change has been reflected across all subsequent screens, including the Customer Portal.



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.



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
? X

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

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

49033001 Encanto Restaurant

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

ACTIVE

DIVISION QAWASTE
ACCOUNT MGR Aliena Somers
CLASS COMMERCIAL
BILL GROUP QA Billing Cycle

ADVANCE - MONTHLY Billed Thru Date Apr 30, 2024

HIGHLIGHTS

REF	DESCRIPTION	BY	DATE	REASON
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	0DDC	1x per week	M	\$ 120.00	\$ 120.00 per month		02/01/24	

CALENDAR May, 2024

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	(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		

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]

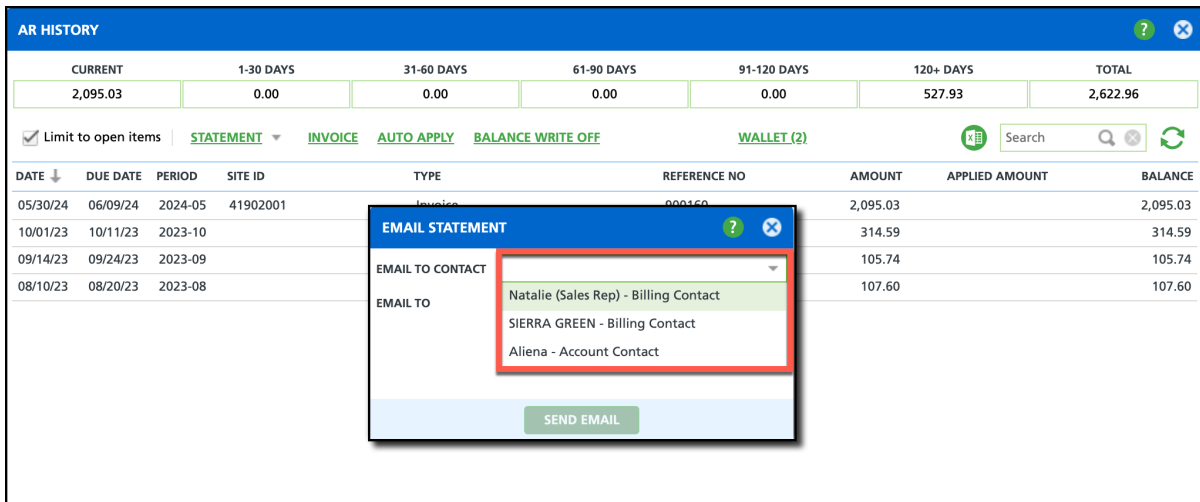
An enhancement has been made for accounts set to 'Email With Link' or 'Email with Attachment.' If a billing contact's email is on the email blocklist, a red exclamation point icon will appear on both the account screen and the contacts screen. When users hover over the icon, a tooltip will display the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

TYPE	BILLING CONTACT	NAME	TITLE	EMAIL	PHONE	SERVICE NOTIFICATION	REQUEST NOTIFICATION	PORTAL USER
Account	Billing Contact 1	DOCTORS SQU...	(Sales Rep)	loris@navusoft...		Email	None	Yes
Account	None	DOCTOR SQUARE				No	None	No
Account	None	Tim	(Driver)	timothy@navus...		Attachment	None	No

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.

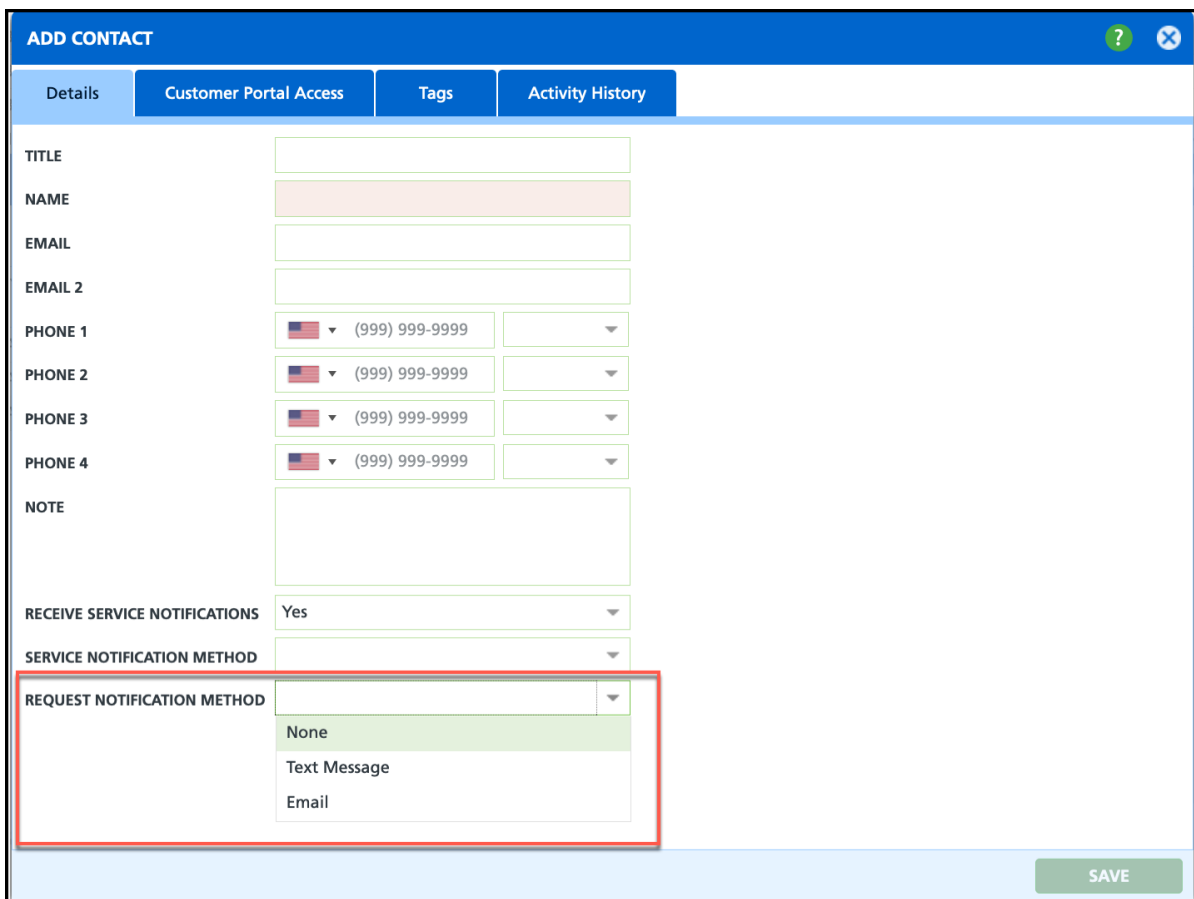


Pathway: Accounts > Search > Accounts

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:

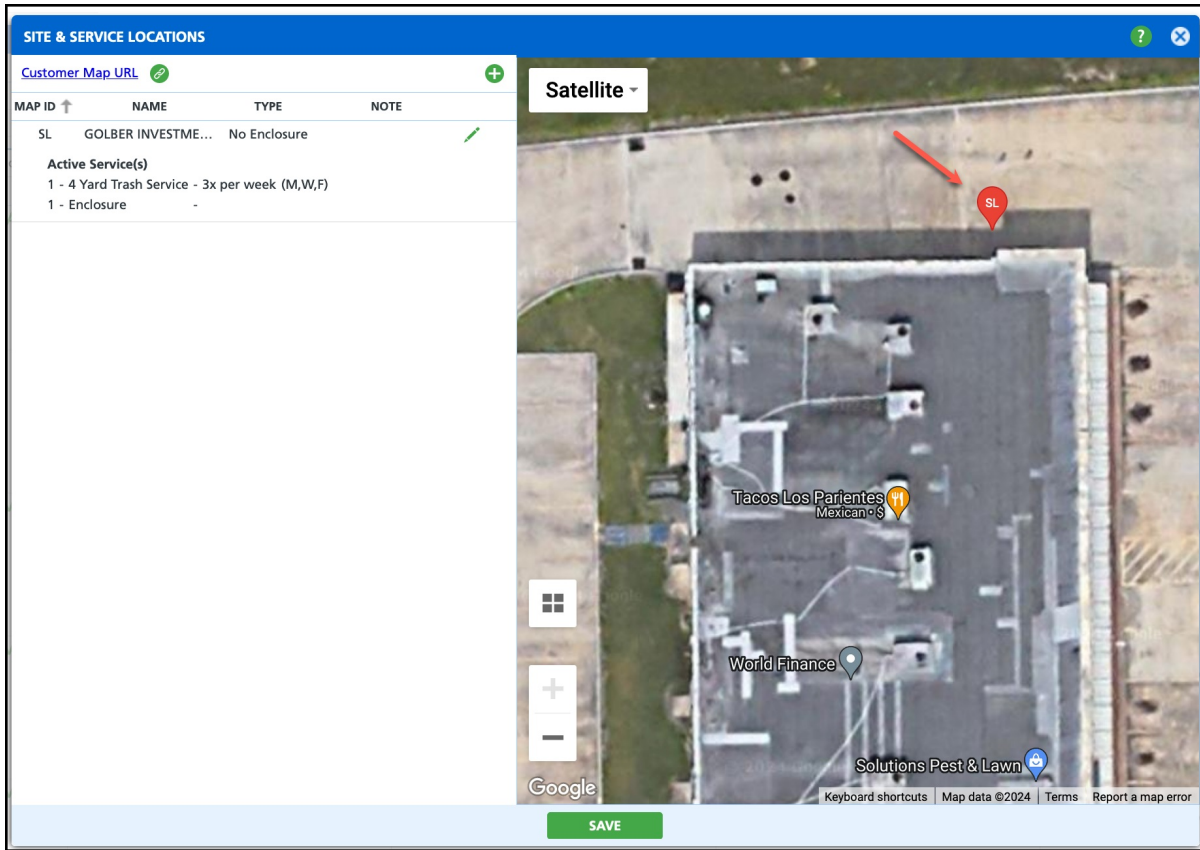
- None: Contact will not receive request notifications in text or email. Customer must check the portal for request updates.
- Text Message: Contact will receive request notifications as a text only.
- Email: Contact will receive request notifications as email only.



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

Customer Service Screen (Accounts) - Geocoded Stops Resetting 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.

LEED REPORTABLE NO

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

<p>Account Status</p> <ul style="list-style-type: none"> ■ Active ■ Bad Debt ■ Credit Hold ■ Inactive ■ Prospect 	<p>Site Status</p> <ul style="list-style-type: none"> ■ Active ■ Exempt ■ Inactive ■ Prospect ■ Site Credit Hold ■ Vacant ■ Vacation Hold 	<p>Work Order Status</p> <ul style="list-style-type: none"> ■ Cancelled ■ Do Not Service ■ In Progress ■ Not Serviced ■ Pending Payment or Approval <input type="checkbox"/> Scheduled ■ Service Completed
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May 29			
Jun 5			
Jun 12	Jun 13	Jun 14	Jun 15
		<div style="border: 1px solid gray; padding: 2px; display: inline-block;"> \$1 10 Yard Open Top Service, ADD-Add Svc - New Ser 👁 (1 views) - Aliena Somers </div>	

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 1 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

EXTERNAL ID

DISPLAY IN CUSTOMER PORTAL

AVAILABLE IN NAVUNAV

INCLUDE WITH INVOICE

Select Print Format

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
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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

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		1
1011	MISC		1
1012	SCALE_OUT		1

Available Actions

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

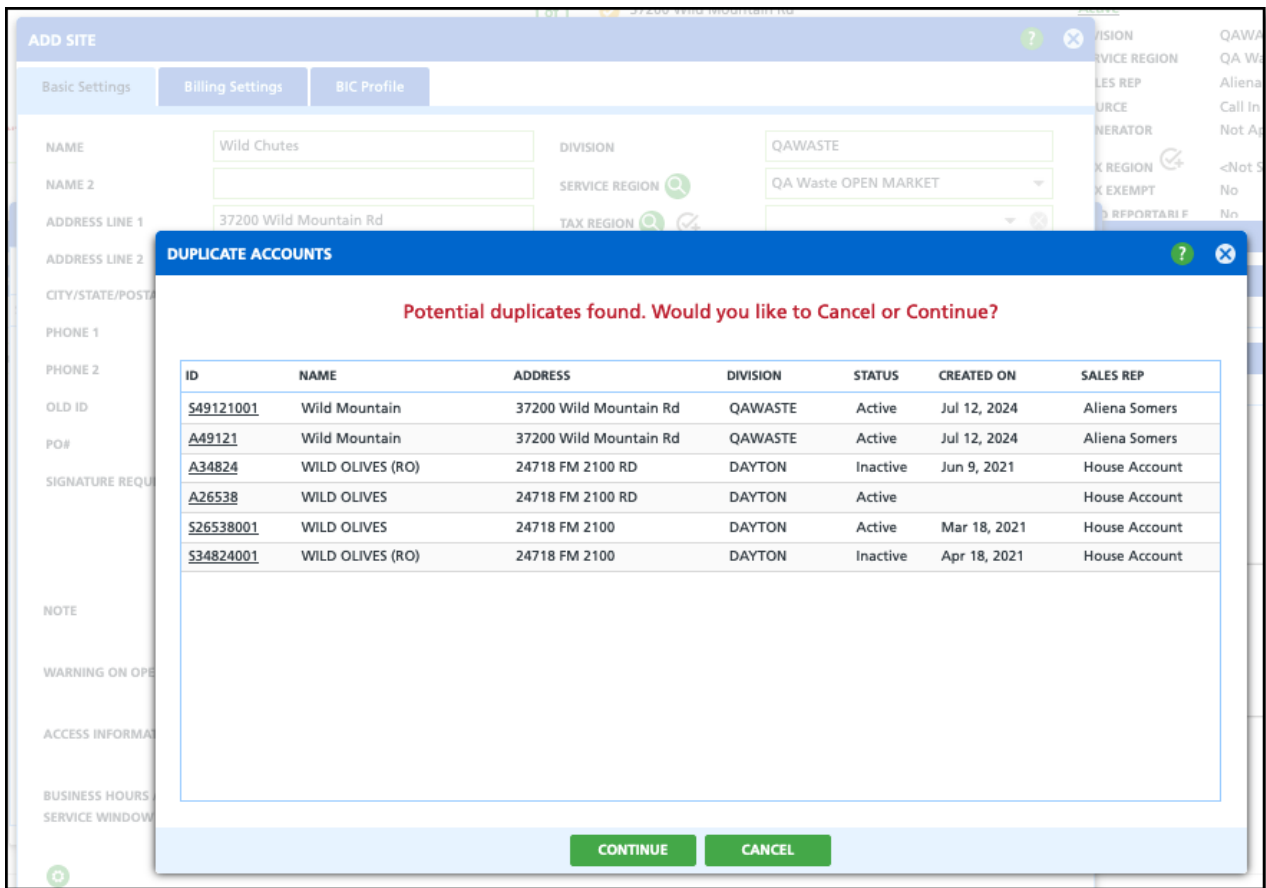
NOTE:

EVENT CLASS	EVENT TYPE	ALLOW SWITCH TO WORK TYPE	NOTE
Roll off Services	On Call		
Roll off Services	On Call		
Roll off Services	Scheduled Service		
Roll off Services	On Call	RO Swap	No
Roll off Services	Add Service	RO Delivery	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

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.



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.

49121001 Wild Mountain

Mountain Rd, MN 55084

37200 Wild Mountain Rd
Taylors Falls, MN 55084
Chisago County
US

Active

Active

1 of 1

QAWASTE

QAWASTE

QA Waste OPEN MARKET

Account MGR: Aliena Somers

SALES REP: Aliena Somers

CLASS: COMMERCIAL

SALES STAGE: Call In

BILL GROUP: QA Billing Cycle

SOURCE: Not Applicable

OPERATOR: <Not Set>

REGION: No

EXEMPT: No

REPORTABLE: No

NOTES

FRI Jul 5 SAT

Jul 12
Aliena Somers

Jul 19

Jul 26


ACTIVE

SITE STATUS HISTORY

SITE STATUS	SALES STAGE	EFFECTIVE DATE	UPDATED BY	NOTE
Active		Jul 12, 2024	Aliena Somers Jul 12, 2024	

NEW STATUS: Active

SALES STAGE:

EFFECTIVE DATE: 

NOTE:

SAVE

TODAY

JULY 2024

S	M	T	W	T	F	S
30	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

Pathway: Accounts > Site Status

Add Menu (Accounts) - 'Add Menu' Reorganized and Option Added (16936)

The Add Menu for accounts and sites has been reorganized and 'Account Request' has been added to the list of available options.

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

Active
 DIVISION QAWASTE
 ACCOUNT MGR House Account
 CLASS COMMERCIAL
 BILL GROUP Annual Billing
 ADVANCE - ANNUALLY Billed Thru Date Jan 31, 2025

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

PENDING

\$ 60587	Roll Off Delivery
\$ 60590	Roll Off Delivery

TOTAL RECURRING \$ 35.00

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			EFFECTIVE DATE			
Standard		NET VARIANCE \$29.70	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: Extended 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 RECUR 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	occurri. Months at R	Billed thru D	Contract Exp	Account Clas	Bill Group	Next Invoice	Service Regi	Sales Rep	ID	Postal Code
DAYTON	77535	1	2	4	undefined	undefined	COMMERCIA DAY-Q1-JAN	03/13/2023E	DAYTON OPI House Acct n	384		384	77535
DAYTON	77535	1	3	5	undefined	undefined	COMMERCIA DAY-COMM	10/01/2023E	DAYTON OPI House Acct n	371		371	77535
DAYTON	77535	1	4	9	undefined	undefined	COMMERCIA DAY-COMM	10/01/2023E	QA Waste O House Accou	401		401	77521-7608
DAYTON	77535	1	5	9	undefined	undefined	COMMERCIA DAY-COMM	10/01/2023E	DAYTON OPI House Accou	359		359	77535
DAYTON	77535	1	6	9	undefined	undefined	COMMERCIA DAY-COMM	10/01/2023E	DAYTON OPI House Accou	368		368	77535
DAYTON	77535	1	7	9	undefined	undefined	COMMERCIA DAY-COMM	10/01/2023E	DAYTON OPI House Acct n	371		371	77535
DAYTON	77535	1	8	9	undefined	undefined	RESIDENTIAL DAY-RESI MC	02/01/2023E	DAYTON OPI House Accou	352		352	77535
DAYTON	77535	1	9	9	undefined	undefined	RESIDENTIAL DAY-RESI MC	02/01/2023E	DAYTON OPI House Accou	369		369	77535
DAYTON	77535	1	10	9	undefined	undefined	COMMERCIA DAY-COMM MONTHLY	CU DAYTON OPI House Accou	397			397	77575
DAYTON	77535	1	11	5	undefined	undefined	COMMERCIA DAY-COMM	10/01/2023E	DAYTON OPI House Accou	371		371	77535
DAYTON	77535	1	12	4	undefined	undefined	COMMERCIA DAY-COMM MONTHLY	CU DAYTON OPI House Acct n	384			384	77535
DAYTON	77535	1	13	4	undefined	undefined	COMMERCIA DAY-COMM MONTHLY	CU DAYTON OPI House Accou	384			384	77535
DAYTON	77535	1	14	4	undefined	undefined	COMMERCIA DAY-COMM MONTHLY	CU DAYTON OPI House Accou	353			353	77535
DAYTON	77535	1	15	7	undefined	undefined	COMMERCIA DAY-COMM	10/01/2023E	DAYTON OPI House Accou	400		400	77535
DAYTON	77535	1	16	4	undefined	undefined	COMMERCIA DAY-COMM MONTHLY	CU DAYTON OPI House Accou	356			356	77535
DAYTON	77535	1	17	9	undefined	undefined	COMMERCIA DAY-COMM	10/01/2023E	DAYTON OPI House Acct n	386		386	77535
DAYTON	77535	1	18	5	undefined	undefined	COMMERCIA DAY-COMM	10/01/2023E	DAYTON OPI House Accou	396		396	77535
DAYTON	77535	1	19	9	undefined	undefined	COMMERCIA DAY-COMM	10/01/2023E	DAYTON OPI House Accou	418		418	77535
DAYTON	77535	1	20	9	undefined	undefined	COMMERCIA DAY-COMM	10/01/2023E	DAYTON OPI House Acct n	386		386	77575-9247
DAYTON	77535	1	21	9	undefined	undefined	COMMERCIA DAY-COMM	10/01/2023E	DAYTON OPI House Accou	359		359	77582
DAYTON	77535	1	22	9	undefined	undefined	COMMERCIA DAY-COMM	10/01/2023E	DAYTON OPI House Accou	359		359	77538
DAYTON	77535	1	23	9	undefined	undefined	COMMERCIA DAY-COMM	10/01/2023E	DAYTON OPI House Accou	363		363	77535
DAYTON	77535	1	24	9	undefined	undefined	COMMERCIA DAY-COMM	10/01/2023E	DAYTON OPI House Accou	359		359	77582
DAYTON	77535	1	25	9	undefined	undefined	COMMERCIA DAY-COMM	10/01/2023E	DAYTON OPI House Acct n	370		370	77336
DAYTON	77535	1	26	3	undefined	undefined	COMMERCIA DAY-COMM MONTHLY	CU DAYTON OPI House Accou	414			414	77575
DAYTON	77535	1	27	3	undefined	undefined	RESIDENTIAL DAY-COMM	10/01/2023E	DAYTON OPI House Accou	403		403	77582
DAYTON	77535	1	28	4	undefined	undefined	COMMERCIA DAY-COMM MONTHLY	CU DAYTON OPI House Acct n	384			384	77535
DAYTON	77535	1	29	5	undefined	undefined	COMMERCIA DAY-RESI MC	02/01/2023E	DAYTON OPI House Acct n	352		352	77535
DAYTON	77535	1	30	7	undefined	undefined	RESIDENTIAL DAY-RESI MC	02/01/2023E	DAYTON OPI House Accou	370		370	77575
DAYTON	77535	1	31	3	undefined	undefined	COMMERCIA DAY-COMM	10/01/2023E	DAYTON OPI House Acct n	401		401	77582
DAYTON	77535	1	32	4	undefined	undefined	COMMERCIA DAY-COMM MONTHLY	CU DAYTON OPI House Acct n	384			384	77580
DAYTON	77535	1	33	4	undefined	undefined	COMMERCIA DAY-ROLF MONTHLY	DAYTON OPI House Accou	358			358	77535

EXPORT

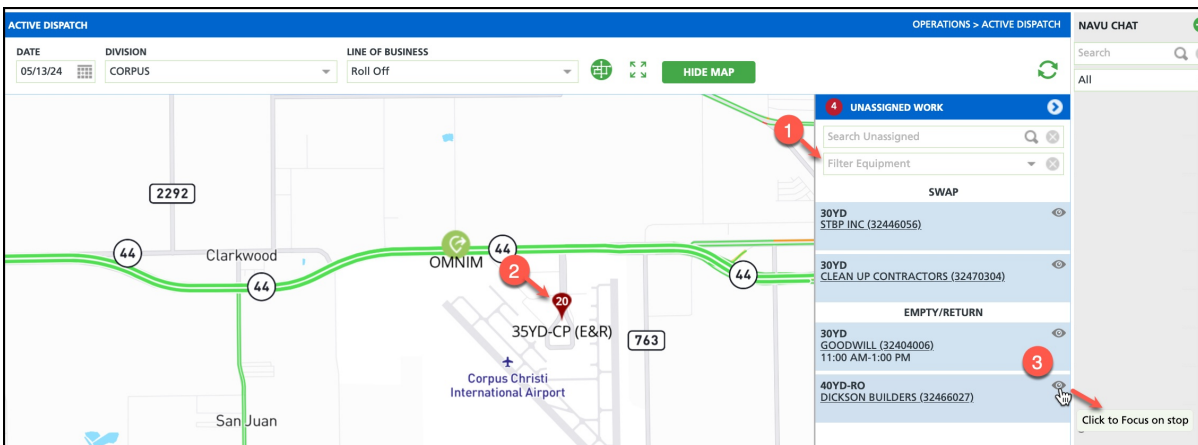
Pathway: Sales > Rate Update Batch

Operations

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

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

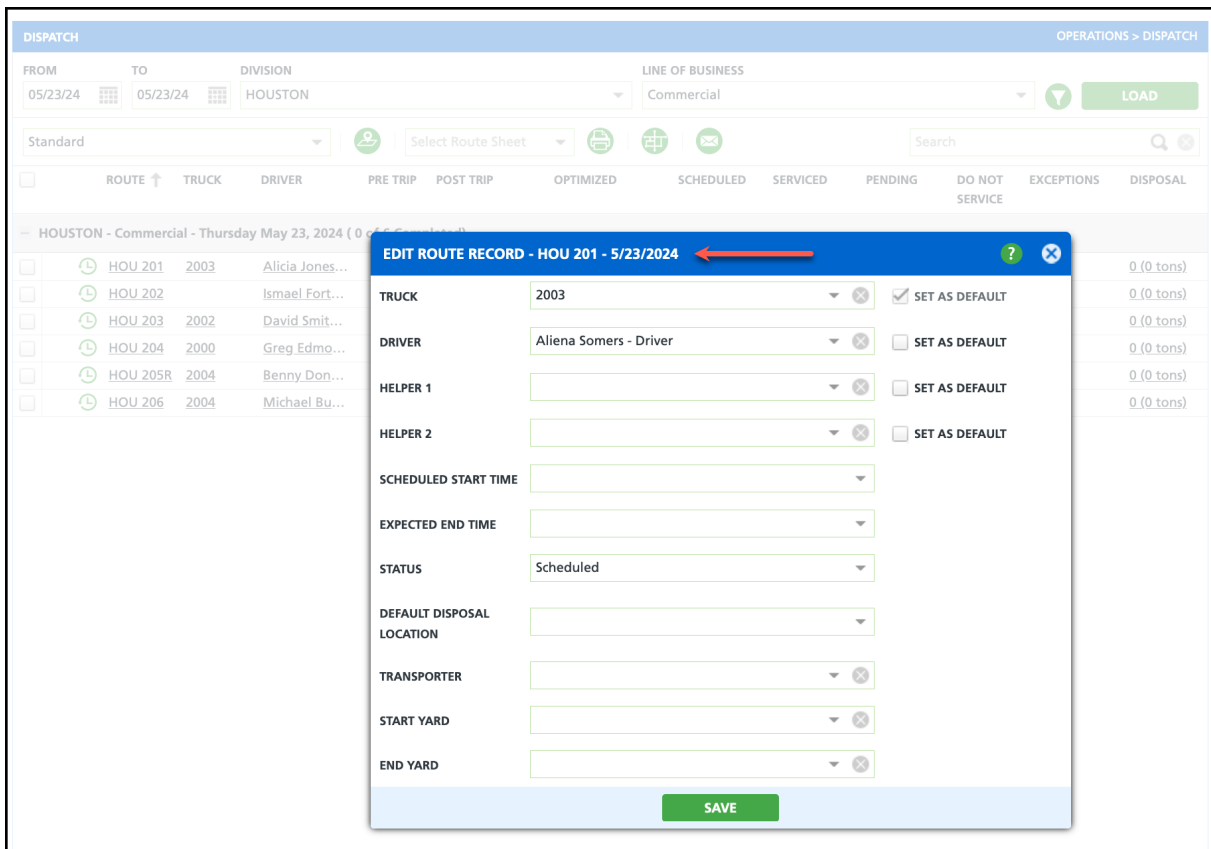
1. A Filter Equipment option has been added to further filter the Unassigned Work column.
2. The stop's sequence number displays inside the location pin (only for route assigned stops).
3. A toggle button has been added allow the user to "focus" on a specific unassigned stop. When selected, all other 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 COMPLETED 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: 7622691 | QTY: 1 | SERVICE CODE: 2 Yard Trash Service | EQUIPMENT: 2YD | WORK TYPE: FL_SERVICE | ORDER TYPE: Scheduled Service | MATERIAL: MSW

ORDER NOTES: [Empty]

PO NUMBER: [Empty] | EXTERNAL ID: [Empty]

SCHEDULED DATE: 05/09/24 Thursday | ROUTE: COR DUMPSTER DEL/REM | SEQUENCE: 0 | DESTINATION / ORIGIN: [Empty]

WORK STATUS: **Service Completed** | EXCEPTION REASON: [Empty] | POSTING STATUS: Pending

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

Lab Tests | Attachments | Labels | Photos | Timeline

WO MINIMUM: [Empty] | **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**

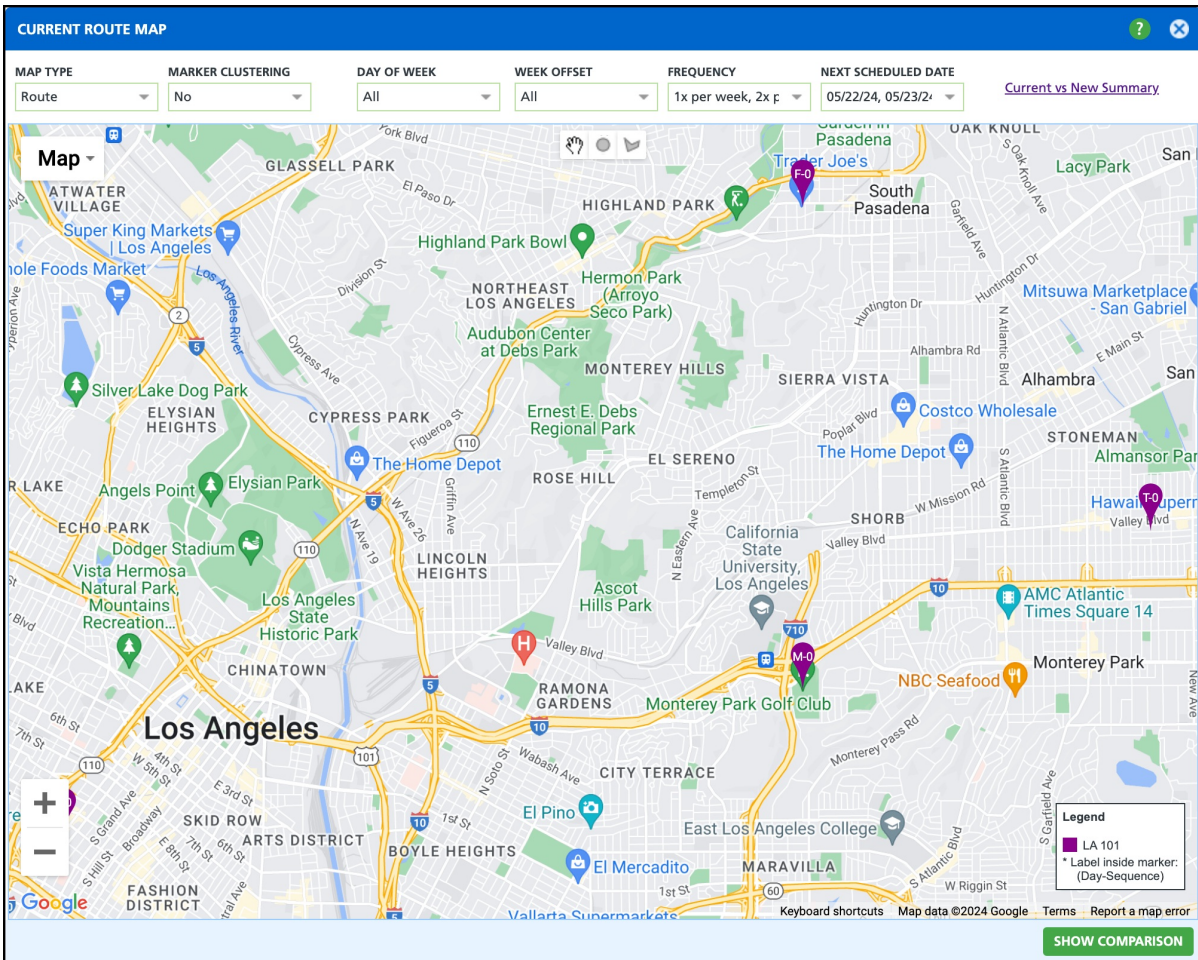
8 records | Search

LOCATION	ADDRESS	QTY	SERVICE CODE	FREQUENCY	START DATE ↓	ROUTE	SEQUENCE	WEEK OF MONTH	POST
49017001 Prospect test 3	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
4891800001 QA Waste Processing	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
49015001 Test Prospect	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
48980001 Roll Off Service Mini...	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.
 - o The Account Information view will retain the information that was previously displayed before these views were added.
 - o 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		TYPE		ACCOUNT CLASS		TERM		BILL GROUP													
QAWASTE		AR Aging By Past Due Date		COMMERCIAL		All		All		LOAD											
ACCOUNT MANAGER		ACCOUNT STATUS		AUDITOR		MIN. PAST DUE BALANCE															
		Active, Bad Debt, C																			
Contact Information																					
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											
DATE		BANK ACCOUNT		STATUS							
03/21/2024		COMERICA - FWS		Open							
NOTE		CREATED BY:		POSTED BY:							
		Matthew Van Doren - 03/21/2024 9:48 am									
+ SORT		DEFAULT PAYMENT TYPE		COUNT							
Entry Order ↓		ACH		2							
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"/>	Apply	<input type="checkbox"/>
30622	PIZZA HUT	Active	\$ 3,368.25	ACH	999	274.76	0.00	<input type="checkbox"/>	<input type="checkbox"/>	Apply	<input type="checkbox"/>

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

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	<input type="checkbox"/>	<input type="checkbox"/>	Apply <input type="button" value="✎"/> <input type="button" value="🖨️"/>

SEARCH ACCOUNTS / SITES

Double click on search result to add payment

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

 Amount \$ 5.00

Pathway: Accounting > AR Payment Batch

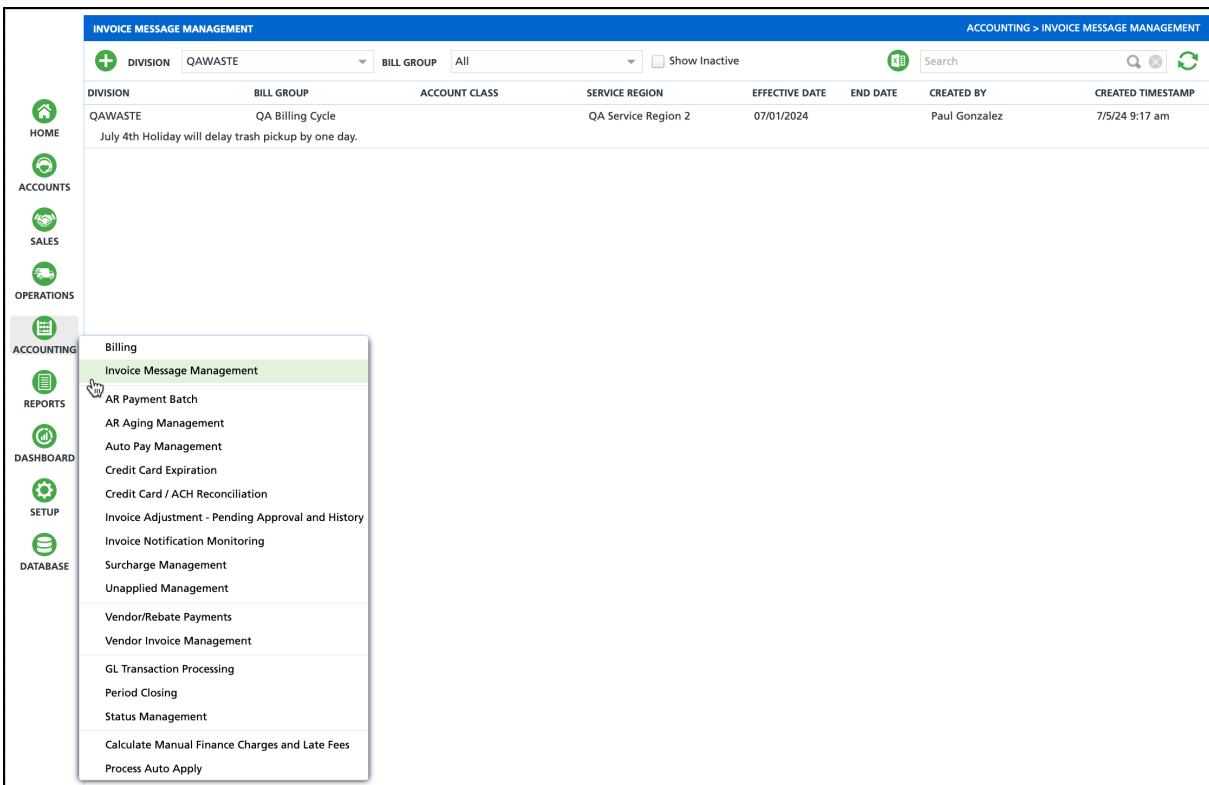
Invoice Message Management (Accounting) - New Screen Available (16963, 16972)[New Feature]

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.



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.

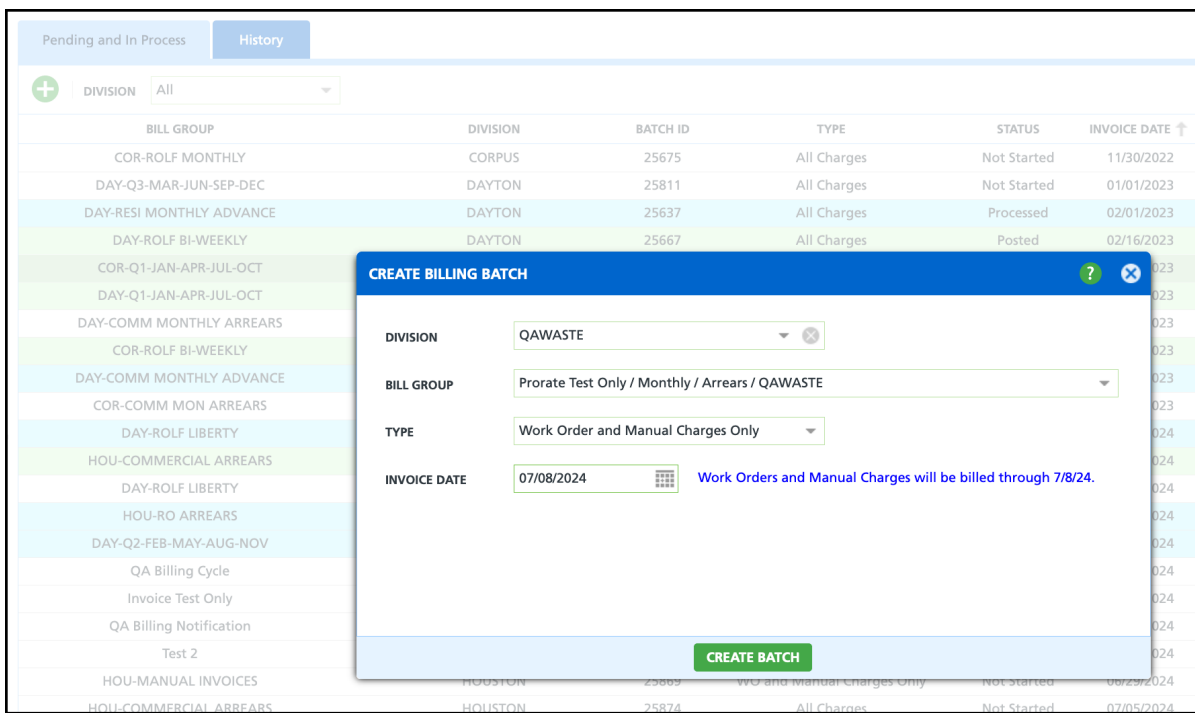
BATCH ID	TYPE	BILL GROUP	PRINTED	EMAILED	ED NOT PAID	NOT VIEWED NOT PAID
25537	All Charges	COR-Q1-JAN-APR-JUL-OCT	1751	0		1738
25556	Single Invoice	DAY-RESI MONTHLY ADVANCE	1	0		1
25557	Single Invoice	COR-Q1-JAN-APR-JUL-OCT	1	0		1
25558	WO and Manual Charg...	HOU-MANUAL INVOICES	1	0	0	1
25559	WO and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



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
							68
							3

Hover mouse over warning icon to display omitted divisions in a tooltip

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"/>

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

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		
Period	Apr 2024	Effective Date	All	All							
GROUP BY: Sales Rep											
	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:

- o Previously, this tab was called 'Finance Charges \ Late Fees' and was renamed to 'Finance Charges and Other Fees'
- o 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.

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:

- o Insufficient Funds Fee must include a value greater than '0'.
- o 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.

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 account management interface for 'Cabra Los Angeles'. It includes account details, a 'Credit Hold' status, and a 'PENDING' highlight for a credit hold placement fee of \$18.00 on 05/17/2024. The 'ACTIVE SERVICES' table shows two services: '3 Yard Trash Service' and '30 Yard Open Top Service - MSW'. The 'CALENDAR' view shows a 'Credit Hold Placement Fee' event on May 17, 2024.

QTY	SERVICE CODE	SERVICE ID	FREQUENCY	SCHEDULE	PER UNIT RATE	RATE	WO 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
? X

NAME

TYPE

ACTIVE

ALLOW SELF-SERVICE ORDERING

1 **ASSIGN USER BY DEFAULT**

2 **DEPARTMENT**

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				Search	
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 by 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 NAME ACTIVE Yes

Em **Account Request Notification**

DEFAUI Account Statement CONTENT TYPE text/html

DEFAUI Automatic Payment Change

DEFAUI Contact Form [PREVIEW](#) KEY PATHS Search

Credit Card Expiration

Credit Memo

Customer Portal Notification

Future Services Calendar

Invoice

NavuSales iOS

New On Call Order

Online Order

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	<div style="border: 1px solid #ccc; height: 50px;"></div>	

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							
API GRAVITY LAB TEST ID							
SPECIFIC GRAVITY LAB TEST ID							
ENABLE SITE BILLING ADDRESS	Yes						
ENABLE SITE BILL GROUP	Yes						
ENABLE AGING BY SITE	No						
SERVICES GRID DEFAULT VIEW	Standard						
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						
CREDIT HOLD NOTIFICATION TEMPLATE							
ENABLE ONLINE SIGNATURE MESSAGING	No						
LIMIT PAYMENT BATCH TO SINGLE DIVISION	No						
LIMIT BILL GROUP TO SINGLE DIVISION	No						
ACCOUNT AND SITE DIVISION MUST MATCH	Yes						
SMS DEFAULT TASK TYPE	Customer Support						
SMS UNKNOWN USER RESPONSE							

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 | Feb 12 9:00 am test | 4:48 pm

ACCOUNTS | Wed 05/22/24 | 3:15 am

SALES | Tue 05/21/24 | 11:40 am

OPERATIONS | 11:23 am

ACCOUNTING | 3:53 am

REPORTS | 3:51 am

DASHBOARD | 3:50 am

SETUP | 3:50 am

DATABASE | 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

Database Menu:

- 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

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](#).

The screenshot displays the software's main interface with a sidebar on the left containing navigation icons for HOME, ACCOUNTS, SALES, OPERATIONS, ACCOUNTING, REPORTS, DASHBOARD, SETUP, and DATABASE. The DATABASE menu is expanded, showing options like 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, and User Data Transfer. The 'Import' option is further expanded to show sub-options: Import Account/Site Info, Import Credit Card Accounts, Import Fuel Record, Import Manual Charges (highlighted), Import Paycom Payroll Import, Import Services, and Import User. In the background, a table lists items under the 'QUOTES/CONTRACTS' tab, including 'Encanto Restaurant A-New Business-Acquisition \$ 300.00', 'Starstruck New Business - Required Below Max \$ 300.00', and 'The Perk A-New Customer \$ 0.00'. A modal window titled 'IMPORT MANUAL CHARGES' is open, featuring a 'SELECT FILE' section with a 'Select File...' input and a 'BROWSE...' button, an 'IMPORT NOTE' text area, and an 'IMPORT' button. A message at the bottom of the modal states: 'Charges will be imported and included on the next Invoice'.

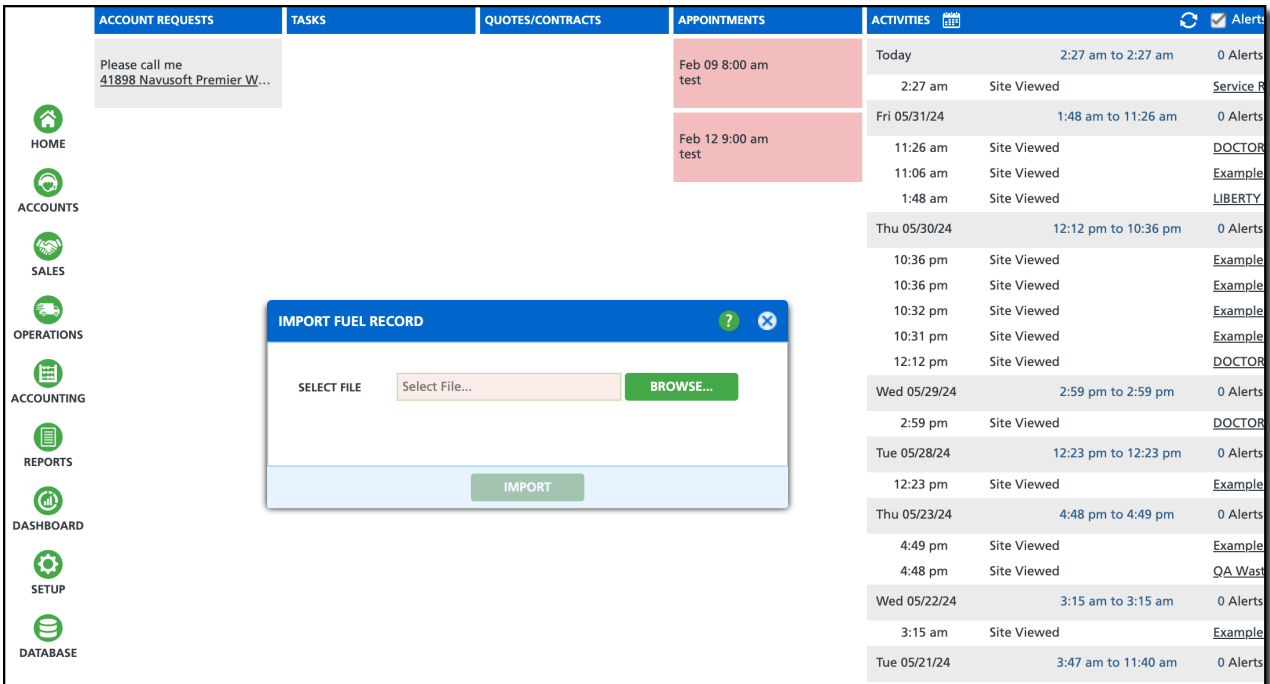
Pathway: Database > Import > Import Manual Charges

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

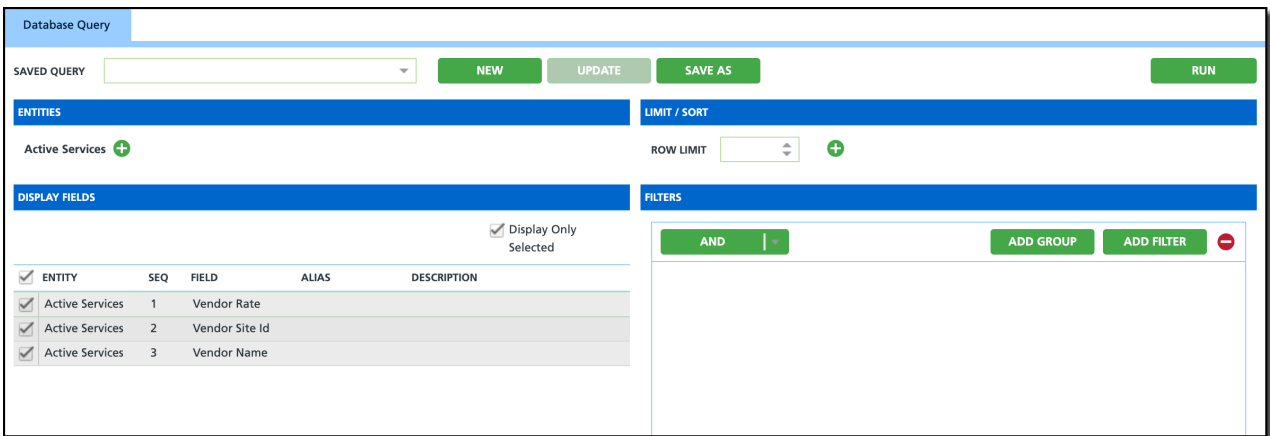
Modifications to the import logic have resolved an error where the system falsely indicated a successful import even though no records were actually imported.



Pathway: Database > Import > Fuel Records

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

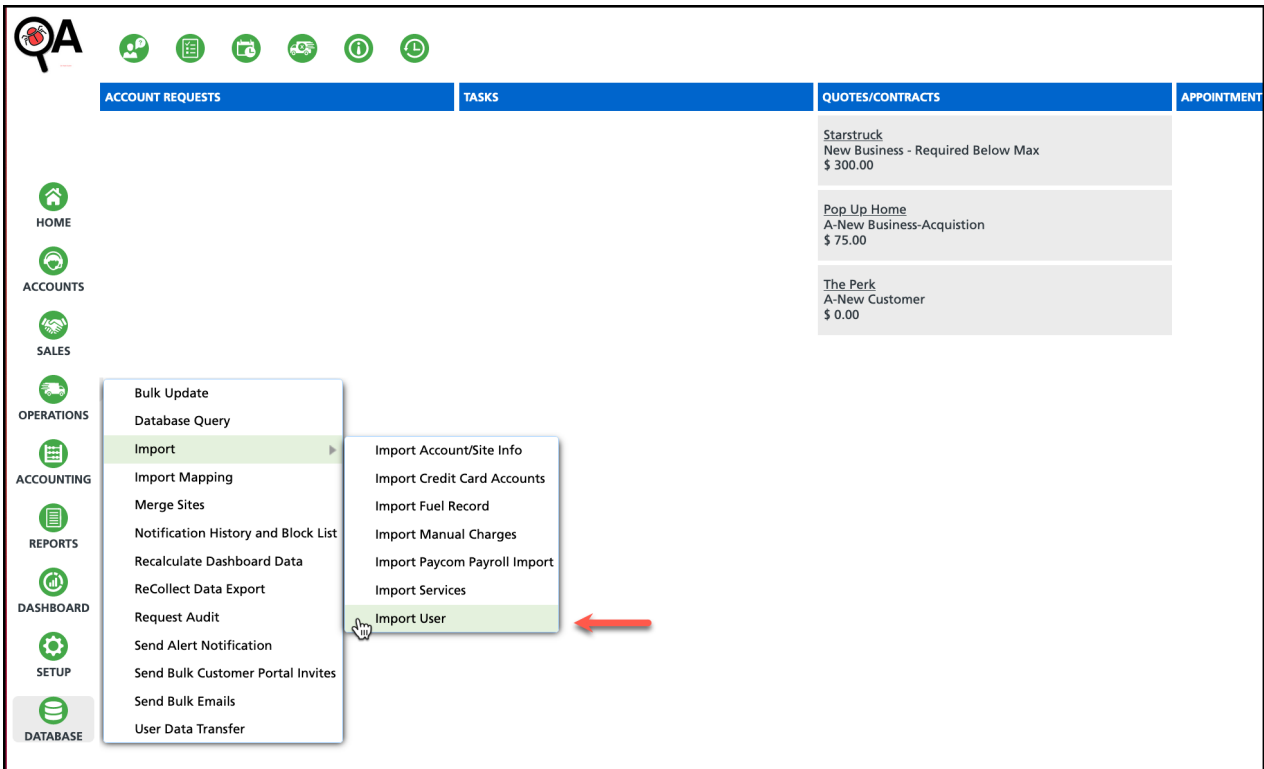
An enhancement has been made to add new fields to the Active Services Query selections. The following fields were added: Vendor Name, Vendor Rate, and Vendor Site ID.



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.

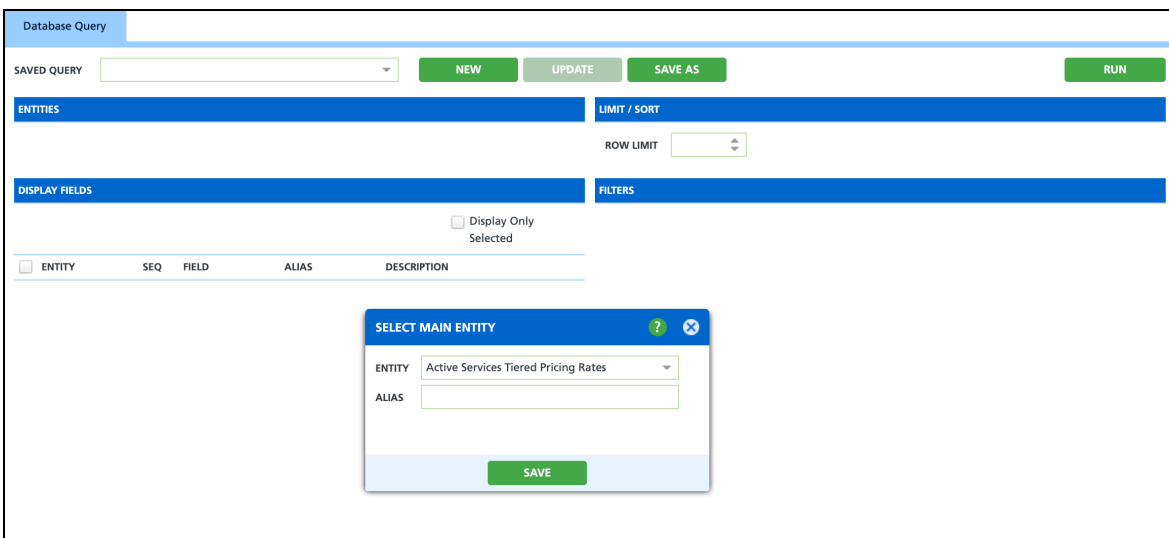


Pathway: Database > Import > Import User

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:

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

ID	DATE	TYPE	DESCRIPTION	RESOLUTION	NAME	ADDRESS
1551	05/14/2024	me...	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

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.

The screenshot shows the 'Service Exceptions' tab selected in the navigation menu. The main content area displays a table of service records. One record is highlighted, and an 'EDIT SERVICE RECORD' modal is open, showing details for a 'Not Serviced' work order.

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

WORK ORDER	QTY	SERVICE CODE	EQUIPMENT	WORK TYPE	ORDER TYPE	MATERIAL
8066085	1	18 Gal Recycle	18GAL-REC	RS_EXTRAPU	On Call	REC

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

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:

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

The screenshot shows the 'CONTACTS' screen with a table of contact information. A new column, 'REQUEST NOTIFICATION', has been added, and its value 'Email' is highlighted for the contact 'Aliena'.

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.

The screenshot shows the 'EDIT CONTACT' interface with a modal window for 'EDIT PORTAL USER'. The main form has tabs for 'Details', 'Customer Portal Access', 'Tags', and 'History (1)'. The 'ENABLE PORTAL ACCESS' checkbox is checked and highlighted with a red box and a '1'. The modal window has tabs for 'Details' and 'Login History'. The 'LOGIN ENABLED' checkbox in the modal is checked and highlighted with a red box and a '2'. A red arrow points from the 'ENABLE PORTAL ACCESS' checkbox to the 'LOGIN ENABLED' checkbox. The modal also shows fields for ID, LAST LOGIN, PHONE, and MOBILE, and a 'SAVE' button.

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.

The screenshot shows the 'SELECT ACCOUNT' screen with a dropdown menu for 'SELECT SERVICE LOCATION'. Below the dropdown is a 'TEST MESSAGE TESTING' section. An error dialog box is displayed in the center, with the text 'Error' and 'You do not have access to any accounts.' and an 'OK' button.

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.

The screenshot displays the Customer Portal interface. At the top, there are two dropdown menus: "SELECT ACCOUNT" (1 of 28) showing "46536 ROADRUNNER RECYCLING" and "SELECT SERVICE LOCATION" (1 of 1) showing "46536001 WS COATINGS INC 5233 Schurmier Road, Houston TX".

On the left, under "TEST MESSAGE TESTING", there are two buttons: a green one for "\$ 4,382.11 TOTAL DUE" and a red one for "\$ 4,382.11 PAST DUE". Below these are navigation buttons: "Make a Payment" (with a sub-note "Last Payment: 11-14-2022 - ACH 11142022 \$ 190.52"), "Invoice History", "Manage Auto Pay", and "Wallet".

On the right, there are two tables. The "CURRENT SERVICES" table has columns "CURRENT SERVICES", "FREQUENCY", and "NEXT SCHEDULED". It lists three services: "1 - 8 Yard Trash Service" (2x per week, Thu June 27th), "1 - 8 Yard Trash Service" (2x per week, Thu June 27th), and "1 - 2 YD No Work Class" (1x per week, Thu June 27th). A "PRINT CALENDAR" link is below it.

The "RECENT SERVICES" table has columns "RECENT SERVICES", "ID", and "SERVICE". It lists several services with their IDs and statuses: "Wed Jun 26, 2..." (ID: 8065404, Service: 8 Yard Trash Service), "Thu Apr 18, 2..." (ID: 7522879, Status: In Progress, Service: 8 Yard Trash Service), "73766 (In Progress)", "74543 (Completed)", and "40932 (Completed)". A "VIEW PREVIOUS AND FUTURE SERVICES" link is at the bottom right.

A "Success" popup is centered over the interface, displaying the message "Order 6929518 has been created." with an "OK" button.

Pathway: Customer Portal > Create Work Order