

# Release Version 72 [Archive]

Last Modified on 08/08/2025 8:11 am PDT



The release notes in this article correspond to release version 72. Screens and logic may have changed in newer versions.

## Home

### Login Screen - Updates to Login, New User Login and Reset Password Screens (16196)

The following changes have been made to the login, new user login and reset password screens.

#### Login Screen Updates:

The following enhancements have been made to the Login screen:

1. Addition of a 'Show My Password' check box.


The screenshot displays the QA Login interface. At the top, there is a logo featuring a magnifying glass over a red bug, with the text 'QA Login' in red to its right. Below the logo, there are two input fields: the first contains the email address 'email@fakeEmail.com' and the second contains a masked password '\*\*\*\*\*'. Under the password field, there is a label 'SHOW MY PASSWORD' followed by an unchecked checkbox. A red arrow points to this checkbox. Below the input fields is a green 'LOGIN' button. At the bottom, there are two links: 'Forgot or Reset Password' and 'Review License Agreement'.

#### New User Login Screen Changes

The following changes have been applied to the new user login screen:

1. Core URL link added to display below the logo.
2. Addition of a 'Show My Password' check box.
3. The Save button has been renamed to 'Save and Login.'
4. Password requirements added as bulleted text.

**Welcome to Navusoft**



QA Login

1 <https://navusoft.net>

Please update your preferences and password below to access your account.

FIRST NAME	<input type="text" value="P"/>
LAST NAME	<input type="text" value="G"/>
CELL PHONE	<input type="text" value="US"/>
DEFAULT HOMEPAGE	<input type="text" value="Recent Activity"/>
DEFAULT PORTAL COLOR	<input type="text" value="Dark Gray"/>
ONLINE IMAGE	<input type="text" value="Select Image..."/> <input type="button" value="BROWSE..."/>
PASSWORD	<input type="password"/>
CONFIRM PASSWORD	<input type="password"/>

2 SHOW MY PASSWORD ☐

3

4

- Password minimum length is 8 characters
- Password must include at least 1 each of a number, letter, and symbol

## Reset Password Screen

The following changes were applied to the Reset Password screen:

1. Addition of a 'Show My Password' check box.
2. Password requirements added as bulleted text.
3. The Submit button has been renamed to 'Save and Login.'

RESET PASSWORD
?
X

ENTER RESET CODE

ENTER NEW PASSWORD

CONFIRM PASSWORD

SHOW MY PASSWORD
☐
1

2

- Password minimum length is 8 characters
- Password must include at least 1 each of a number, letter, and symbol

3

Pathway: Login Screen

## Keyboard Shortcuts - Keyboard Shortcuts for Mac and PC (16466)

The following keyboard shortcuts that previously used the Command (Cmd) key in Mac have been updated to use the Option (Opt) key:

## Mac

1. Opt + Shift + S = Search
2. Opt + Shift + C = Create Account
3. Opt + Shift + O = Order Processing
4. Opt + Shift + B = Billing
5. Opt + Shift + M = Sales Management
6. Opt + Shift + D = Dispatch
7. Opt + Shift + Z = Back

## PC for Reference

1. Alt + Shift + S = Search
2. Alt + Shift + C = Create Account
3. Alt + Shift + O = Order Processing
4. Alt + Shift + B = Billing
5. Alt + Shift + M = Sales Management
6. Alt + Shift + D = Dispatch
7. Alt + Shift + Z = Back

## Admin Requests - Logic Updated to Improve Handling of Larger Requests (15623)

The Navu Requests issue causing errors during save and performance problems has been resolved.

NAVU REQUEST 24651 - PAUL GONZALEZ ON APR 17, 2024 9:54 AM - PENDING APPROVAL

REQUEST TYPE

Question

USER

Paul (QA Expert)

PRODUCTS

Core

MODULES

Dashboard

SCREEN / REPORT

Dashboard

SUMMARY

Testing Navu-15623

Description

Details

Attachments

Drop New Attachment

CREATED ON

2024-04-17 9:56 am

CREATED BY

Paul

FILE NAME

NAVU-16356 Completing RO WO.jpg

DESCRIPTION

SUBMIT TO NAVUSOFT

CLOSE REQUEST

## Navu Projects (Home Screen) - Completed and Hold Task Status Options Added (16864)

An enhancement has been made to Navu Projects to add 'Completed' and 'Hold' filter options to the Task Status filter.

NAVU PROJECTS										
Projects and Tasks					Recent Activity					
EXPAND ALL		COLLAPSE ALL		PROJECT STATUS		Not Started, In Progress		TASK STATUS		
								Not Started, In Progress, Cor		
								<input checked="" type="checkbox"/> All <input checked="" type="checkbox"/> Not Started <input checked="" type="checkbox"/> In Progress <input checked="" type="checkbox"/> Completed <input checked="" type="checkbox"/> Voided <input checked="" type="checkbox"/> Hold <input checked="" type="checkbox"/> Waiting For Customer <input checked="" type="checkbox"/> In Development		
PROJECT ID	PROJECT NAME	TYPE	PROJ... MAN...	STATUS	START DATE	CO	ACHMENT COUNT	PERCENT COMPLETION	TASKS	
									OPEN	IN PROGRESS
1030	Implemen... Template	New Customer Implemen...	Hol... Pate	In Progress	06/01/2023	06	0	0%	10	0
1131	Test Project	Internal Project	Nik... Rai...	Not Started	09/01/2023	05	1		0	0

Pathway: Home > Navu Projects

## Accounts

### Accounts - Logic Updated to Per Unit Rate Field (16170, 16286)

Logic has been updated to the Per Unit Rate field for Manual Charges and Active Services to allow users to enter a 7 digit rate. Previously, anything over 999,999 was not supported and an error message would display.

Jan 2

Jan 3

Jan 4

?

✕

ADD/EDIT MANUAL CHARGE

CHARGE CODE

18 Gal Box Per Container - RMW

QUANTITY

1.00

PER UNIT RATE

1000000.0000

AMOUNT

1000000.00

PO NUMBER

BLANKET PO

DATE

01/18/2024

Jan 11

Jan 18

Pathway: Accounts > Search > Accounts

### Proposals and Service Agreements - Unwanted PDF Copies of Forms Included in Email (16160)

When emailing proposals and service agreements from the Navusoft application, if the user selected forms to attach with the email, a PDF copy of the proposal/agreement was also attached even if the 'Include Attachment?' check box wasn't checked. This has been resolved.

EDIT PROPOSAL - 3915

Settings

Services 1

History 4

Attachment

Master Agreement

ACCOUNT 43696 / JUICE IT UP

DOCUMENT FORMAT

DOCUMENT TYPE

STATUS

SOURCE

Proposal

A-New Business-From Compe

Open

Employee

SALES REP

House Acct non System

TITLE

EFFECTIVE DATE

DELIV

01/17/2024

01/7

TERM

24 Months

PRINT EST. SURCHARGE

No

NOTE

DELIVERY INSTRUCTION

PAYMENT REQUIRED AT CU

Not Required

CUSTOM FIELD1 TEXT

Pre-Authorized by Aliena

EMAIL PROPOSAL

SEND TO (EMAIL)

aliena@fakeEmail.com

EMAIL TO CONTACTS

SUBJECT

Proposal / Agreement

FORMS

INCLUDE ATTACHMENT?

CC SALES REP

CC SENDER

Dear

Thank you for discussing your needs with me so I could offer you a solution that should not only meet your needs, but my goal is to exceed your expectations. Please review the attached proposal I built for you by [clicking here to review your service proposal](#).

Please contact me directly if you have any questions or need additional information. I look forward to working together.

Have a great day!

House Acct non System - House Account

SEND

Pathway: Accounts (Customer Service Screen) > Orders, Quotes, and Contracts (section)

## Accounts - Processing Payments With Inactive Cards (16106)

The issue of inactive credit cards still being available for payment processing has been resolved. Additionally, the 'Post Payment' icon will now be hidden for inactive payment methods.

ACCOUNT PAYMENT METHODS									
ACCOUNT HOLDER NAME	LAST 4 DIGITS	TYPE	EXPIRATION DATE	AUTO PAY	DAY OF MONTH	AUTO PAY MAX	STATUS	CREATED BY	PROCESSOR
Testing Test - ACH Account	5309	Bank Account		No			Active	Matthew Van Dor...	Pineapple
QA Card	1111	Visa	04-30-2026	No			Inactive		Pineapple
Test Navusoft	5123	Visa	05-31-2026	No			Active	Matthew Van Dor...	Pineapple

Pathway: Accounts > Search > Accounts

## Accounts - Credit Card Receipt Includes Link To Invoice (16145)

An enhancement has been made to credit card receipts to now include a hyperlink to paid invoice(s).

# Payment Receipt for QA Waste Services

Date: Jan 22, 2024

Transaction ID: 178855

## Billing Information

Account: 43358 - 888 CHINESE RESTAURANT

Account Holder Name: John Wick

Payment Method: Visa \*\*\*\*1111

Authorization: 9999

Payment Date: Jan 22, 2024

Amount Paid: 105.00

Invoices Paid: [835066,891587](#)

Pathway: Accounts > Search > Accounts

## Scale Ticket Format 1 - '0' Gross Quantity Logic Update (16249)

Logic has been updated to Scale Ticket Format 1 to exclude service record charges that have a Gross Qty of '0.'

**EDIT SERVICE RECORD**

Scale Cash Customer  
1234 Red Rock Rd  
Cresson, TX 76035

Cash on Delivery - Payment Required

CREATED BY  
Lori Jones on 6/13/23 10:27 am

ORDER REASON

TICKET NUMBER 40984 WORK ORDER 6185469 QTY 1 SERVICE CODE Scale Inbound Services WORK TYPE SCALE\_POST ORDER TYPE Inbound / Receiving

ORDER NOTES

TRUCK 9638

MATERIAL MSW

TRANSPORTER

WORK STATUS Received - Completed

Update History David Navar

Gross Weight

Tare/Out Weight

NET WEIGHT

VEHICLE INFO

VEHICLE 9638 Info

TRANSPORTER

PO #

MANIFEST # ext

REQUESTED BY

NOTES

QA Waste Services  
PO BOX 260311  
Houston, TX 78426  
State ID: ST234 EPA ID: EPA234

Scale Cash Customer  
Red Rock Rd  
Cresson, TX 76035

SCALE TICKET 40984

DATE Jun 13, 2023

SITE ID 48947001

TIME IN 10:27 AM

TIME OUT 7:25 AM

MATERIAL MSW

WEIGHT IN 2,462 g

WEIGHT OUT 2,100 g

NET 362 g

Description	Gross Qty	No Charge Qty	Charge Qty	Unit Rate	Minimum	Total
Trash	362	0	362 tons	\$ 50.00	\$ 0.00	\$ 18,100.00
CHARGES						\$ 18,100.00
SURCHARGES						\$ 0.00
TAXES						\$ 0.00
TOTAL						\$ 18,100.00

Charges \$ 18,100.00

Payments

Completion

Attachm

Charges must match Equipment

Charges must match Material

WO MINIMUM

GROSS QTY	LABELS	NO CHARGE QTY	CHARGE QTY	UOM	CHARGE CODE
0		0	0	each	Tires
0		0	0	ton	Construction and Demolition
362		362	362	ton	Trash

Scale Ticket Format 1

SAVE

Pathway: Accounts > Service Record

## Accounts - 0% Recognized As Exact Match By Tax Verification (16232)

Previously, the tax verification process did not acknowledge taxes with a 0% tax rate and showed them as missing in the Tax Results screen. Logic has been updated to recognize the 0% tax rate as an "Exact" match.

EDIT SITE

Basic Settings

Billing Settings

BIC Profile

Required Capabilities

NAME

RAC Construction Solutions LLC

DIVISION

HOUSTON

NAME 2

SERVICE REGION

HOUSTON OPEN MARKET

ADDRESS LINE 1

9738 Misty Vine Ct

TAX REGION

HOUSTON OPEN MARKET

ADDRESS LINE 2

ORIGIN

CITY/ST

PHONE

PHONE

OLD ID

PO#

SIGNATURE

NOTE

TAX RESULTS

MATCH TYPE

A

MATCHING ADDRESS

Post Oak Blvd Houston, TX 77057 Harris County US

TAX	TAX AUTHORITY	RATE	EXPECTED TAX	EXPECTED TAX AUTHORITY	EXPECTED RATE	
HARRIS CO ESD 20	5101874	1%	HARRIS CO ESD 20	5101874	1%	EXACT
HOUSTON MTA	3101990	1%	HOUSTON MTA	3101990	1%	EXACT
TEXAS STATE	48	6.25%	TEXAS	48	6.25%	EXACT
HARRIS COUNTY		0%				EXACT

Pathway: Accounts > Search > Accounts

## Accounts - Inbound/Outbound Work Order Status Not Updating Posting Status (16241)

The logic for the Work Status of Inbound/Outbound work orders has been enhanced to automatically update the Posting Status to "Posted" when the Work Status is set to "Received - Completed" and saved.

EDIT SERVICE RECORD

Scale 2 testing

8104 Washington Ave

Houston, TX 77007

Cash on Delivery - Payment Required

CREATED BY

Matthew Van Doren on 8/15/23 11:08 am

ORDER REASON

TICKET NUMBER

41017

WORK ORDER

6536138

QTY

1

SERVICE CODE

Scale Inbound Services

WORK TYPE

SCALE\_POST

ORDER TYPE

Inbound / Receiving

ORDER NOTES

TRUCK

VEHICLE INFO

PO NUMBER

EXTERNAL ID

MATERIAL

MSW

RECEIVING LOCATION

HOMEBASE

TANK

TRANSPORTER

TRANSPORT METHOD

BILL OF LADING

WORK STATUS

Received - Completed

EXCEPTION REASON

POSTING STATUS

Posted

Gross Weight

lbs

START

08/15/23 Tue

11:08 AM

Tare/Out Weight

lbs

END

01/22/24 Mon

11:51 AM

NET WEIGHT

lbs

CHARGES

SURCHARGES

TAXES

TOTAL

Charges 1

Payments \$ 55.00 1

Completion

Attachments

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
0		0	0	ton	Trash	\$ 50.00		None		\$ 0.00

Select Print Format

SAVE

Pathway: Accounts > Search > Accounts

## Customer Service Screen - Auto Pay and Site Details Improvements (16285)

### Auto Pay Improvements

Auto-Pay requirements have been updated on the customer service screen. Enhancements include additional information about the payment type for both At Billing and Scheduled Day auto-pay methods, as well as red text expiration notices when the credit card being used for auto-pay is expiring soon, or has expired.

100

1

49031 Cascade Nutrition (T4 Cafe)

1234 Balboa Blvd  
Los Angeles, CA 91325-5814

TERMS Due upon receipt  
INVOICE DELIVERY Email with Attachment

Active

DIVISION QAWASTE  
ACCOUNT MGR House Account  
CLASS COMMERCIAL  
BILL GROUP QA Billing Cycle  
ADVANCE - MONTHLY Billed Thru Date Jan 31, 2024  
NEXT INVOICE DATE Jan 31, 2024 BATCH-25778 (in progress)  
SOURCE Acquisition  
REBATE PAYMENT ACH

CURRENT	1-30	31-60	61-90	91-120	120+	TOTAL
26.00	0.00	0.00	0.00	0.00	0.00	26.00

Auto Pay 5th of each month - Visa 1111 Exp: 01/24 Expiring Soon

### Site Details Improvements

The following changes have been applied to Site Details:

- Access and Note labels are hidden if the values are blank.
- Details such as Surcharge Group and Tax Region will display even when Site Details is collapsed.

1 of 4

49031001 Cascade Nutrition (T4 Cafe)

1234 Balboa Blvd  
Los Angeles, CA 91325-5814  
US

NOTE Site Note

Collapsed View of Site

Active

DIVISION QAWASTE  
SERVICE REGION QA Service Region 2  
SALES REP House Account  
SOURCE Acquisition  
GENERATOR Conditionally Exempt  
SITE CLASS COM  
SURCHARGE GRP MULTIPLE FEES  
TAX REGION <Not Set>

Pathway: Accounts > Customer Service screen

## Accounts - Update to 'Default Payment Method' Field in Edit Account (16280)

A 'Not Applicable' option has been added to the list of options for the Default Payment Method field. This is the default selection for imported accounts that have a blank/null AP Default Payment Method.

EDIT ACCOUNT

Account

Settings

Billing

BILL GROUP

DAY-BAD DEBT \ INACTIVE

Arrears - Monthly

Billed Thru Date Dec 19, 2023

Next Invoice Date

INVOICE BY EMAIL

No

TERM

Net 20

CREDIT LIMIT

BILL BY SITE

AUTO STATUS UPDATE

APPLY FINANCE CHARGES

EXCLUDE FROM PAYMENT PROCESSING FEE

EXCLUDE FROM PAST DUE NOTIFICATION

HIDE WORK ORDER FORMAT RATE

INBOUND ORDER AUTO PRINT

AP

DEFAULT PAYMENT METHOD

Not Applicable

ACH

Account Payment Portal

Auto Pay

Credit Card Payment

Mail Check Account

Mail Check Site

Not Applicable

Onsite Debit Card

Wait on Account Invoice

PAYEE NAME

1099

INSTRUCTIONS

WARNING ON OPEN

SAVE

Pathway: Accounts > Account Details (Edit)

## Inbound/Outbound - Destination Options For Outbound WO's Limited Based On Division (16245)

The logic for the Destination field in Outbound work orders has been enhanced to restrict options according to the division linked with the Disposal/Ship Location and Site.

CREATE ON CALL ORDER

SCHEDULE DATE

01/09/24 Tuesday

SERVICE CODE

Manifest Consolidation

ORDER TYPE

Outbound / Shipping - Transfer

QUANTITY

1

REQUESTED BY

CONTACT

REASON CODE

ORDER NOTES

PO NUMBER

BLANKET PO

EXTERNAL ID

SHIPPING LOCATION

DESTINATION

CHAMBERS COUNTY LF

CHAMBERS COUNTY LF-CUST PD

CITY OF BEAUMONT LF

COAST PLAINS LF

DIRT CHEAP MULCH

FCC HOUSTON MRF

HOMEBASE

ITR MRF

OMNI METAL

QA waste Processing

QA Waste Transfer

Republic

REG. MAT. & RECYCLING

TRANSPORTER

CHARGES

Charges must match Equipment

Charges must match Material

GROSS QTY

NO CHARGE QTY

CHARGE QTY

UOM

CHARGE CODE

MINIMUM TYPE

MINIMUM

TOTAL

CREATE

Pathway: Operations > Inbound/Outbound > Outbound (tab) > Select Work Order

## Accounts - Calendar and Rate History Updates in Relation to Rate Update Batch (14835)

Calendar and Rate History in the Customer Service screen have been updated to display the Rate Update Batch and the Rate Update Batch Note upon hover.

The screenshot shows a calendar view for February. A tooltip for Feb 8 displays service details: "Submitted On: 1/15/2024 6:10 PM by Aliena Somers", "Processed On: 1/15/2024 6:10 PM by Aliena Somers", "Reason: CHG-Price Increase", "Previous: 10 Yard Open Top Service \$ 75.00 month", "New: 10 Yard Open Top Service \$ 77.63 month", "Rate Update Batch: 1040", and "Rate Update Batch Note: Inflation".

The Rate History pop-up window shows the following table:

START DATE	START REASON	END DATE	END REASON	QTY	SERVICE CODE	SERVICE ID	PER UNIT	RATE	CONTRACT EXP.
02/02/24	CHG-Contract Renewal			1	3 Yard Trash Service	EB6E	\$ 103.50	\$ 103.50 each	
01/15/24 6:10 pm	Rate Update Batch: 1040				2x per week			\$/CY: 3.98	
02/02/24	CHG-Price Increase			1	10 Yard Open Top Service	53ED	\$ 93.15	\$ 93.15 each	
01/15/24 6:10 pm	Rate Update Batch: 1040				On Call				
02/02/24	CHG-Price Increase			1	10 Yard Open Top Service	0147	\$ 87.98	\$ 87.98 each	
01/15/24 6:10 pm	Rate Update Batch: 1040				1x per week			\$/CY: 2.03	
02/02/24	CHG-Price Increase			1	10 Yard Open Top Service	53ED	\$ 77.63	\$ 77.63 each	
01/15/24 6:10 pm	Rate Update Batch: 1040				On Call				

CHARGE CODES

## Accounts - Clone Site Functionality Available (16270)

The option 'Clone Site and Services' has been added to the account menu drop down. To use this feature, users must have permission 453 (Clone Site and Services). Review the Clone Site and Services article to learn more about how to use this feature.

The screenshot shows the Navusoft Premier Waste And Recycling account screen. The left sidebar menu includes "Clone Site and Services". The main area displays account details for "41898 Navusoft Premier Waste And Recycling". The "CLONE SITE" pop-up window is open, showing the "CLONING METHOD" section with "Clone Site" selected. The "EFFECTIVE DATE" is set to 01/15/24, and the "CLONE NOTE" field is empty. The "SAVE" button is visible at the bottom.

Pathway: Accounts > Customer Service Screen > + Menu > Clone Site and Services

### Accounts (Contracts) - Logic Updated to 'Sold By' Field (16317)

Logic has been updated to the 'Sold By' field in service contracts to display a list of all active users who do not have permission 305 (Assignable as Driver) and permission 328 (Assignable as Helper) associated to their user account.

**EDIT SERVICE CONTRACT - SIGNATURE (NEW) - 1020**

Settings Services <sup>1</sup> History <sup>5</sup> Attachment Master Agreement

ACCOUNT 41898 / Navusoft Premier Waste And Recycling

DOCUMENT FORMAT: Service Contract - signature (l) DOCUMENT TYPE: A-New Service-noPreAuth\Au STATUS: Void SOURCE: [X]

SALES REP: House Acct non System (Hous) SOLD BY: [Dropdown Menu Open]

FORM CONTACT: [Dropdown Menu]

Linked Leads (0)

TITLE: [Text Field]

EFFECTIVE DATE: 06/11/2021 DELIVERY DATE: 06/11/2021

TERM: 60 Months RENEWAL TERM: 60 Months

PRINT EST. SURCHARGE: No PRINT EST. TAX: No

NOTE: [Text Area]

DELIVERY INSTRUCTION: [Text Area]

PAYMENT REQUIRED AT CUSTOMER SIGNATURE: Not Required

CUSTOM FIELD1 TEXT: [Text Field] -

SAVE PRINT

Pathway: Accounts > Search > Accounts

### Accounts (Site Details) - Override Logic Updated if Franchise Fee is 'Yes' (16331)

In both the Site Surcharge Rates and Surcharge Management screens, the override option is disabled when the Franchise Fee is set to 'Yes.' In the Site Surcharge Rate screen, the action icon is hidden, while in Surcharge Management, the hyperlink for the Current Rate is disabled.

43178001
MACYS 208

1 of 64

1234 BROADWAY  
PEARLAND, TX 77584-9785  
US  
(555) 555-5555

Active

DIVISION  
HOUSTON

SERVICE REGION  
PEARLAND MUNICIPAL

SALES REP  
John Doe (Inactive)

SURCHARGE GRP  
Pearland Franchise Fee

TAX REGION  
PEARLAND CITY

TAX EXEMPT  
Yes ()

LEED REPORTABLE  
No

SITE SURCHARGE RATES

SURCHARGE	TYPE	FRANCHISE FEE	RATE / INDEX
Pearland Franchise Fee	Percentage %	Yes	0%

8DAB

On Call

\$ 60.00 per month

02/01/24

Pathway: Accounts > Customer Service Screen (Site Details) > Surcharge Grp; Accounting > Surcharge Management

## Add/Edit Services - Addition of 'Current Competitor' Field (16335)

A 'Current Competitor' field has been added to the Add Active Service screen for reason codes that have the 'Capture Competitor' option enabled.

ADD ACTIVE SERVICE

REASON CODE
ADD-New Bus-From Competitor
COMPETITOR

START DATE

QTY
EQUIPMENT
Choose one
SERVICE CODE
FREQUENCY
PER UNIT
0.0000
SERVICE FEES
0.00

REQUESTED BY

SERVICE NOTES

Map

+

SERVICE CHARGES
RATE
UOM
NO CHARGE
QTY
EST QTY
MINIMUM TYPE
MINIMUM
MAX WEIGHT

Pathway: Accounts > Customer Service Screen > Add Service

## Order Processing (Accounts) - Screen Updates to Online On-Call Orders Tab (16040)

The following columns have been added to the Online On-Call Orders screen:

- Term

- Estimated Charges
- Payments
- Approve
  - Hover over the Approve button to display the 'Approve Release to Dispatch' tool tip.
  - Upon selecting the Approve button for a site, the service record's Work Status will be changed to 'Scheduled' and the site will be removed from the Online On-Call Orders grid.

#### Other Changes:

- Double click within the row of a site to open the Service Record.

New Customer/Site		Service Changes	Online On-Call Orders							
DIVISION	All	LOAD								
SITE ID	SITE NAME	ADDRESS	STATUS	TERM	WO#	ESTIMATED CHARGES	PAYMENTS	CONTACT	SCHEDULED DATE	APPROVE
24770002	Navu CONCRETE CONSTRUCTION	1111 FM 2830 LIBERTY, TX	Active	Net 20	3667106	\$ 25.29	\$ 25.00		Wed 4/20/22	✓
32953023	CITY OF CORPUS CHRISTI	2222 LEOPARD STREET CORPUS CHRISTI, TX	Active	Net 20	4292258	\$ 0.00	\$ 0.00		Tue 7/5/22	✓
41902001	Example Site 1	2222 Navu Cir Corpus Christi, TX	Active	Due upon r...	6838116	\$ 0.00	\$ 0.00	Allena	Wed 10/18/23	✓
46604001	Jeff Johnson	3333 Manor Tree Ct Houston, TX	Active	Net 20	4140702	\$ 0.00	\$ 0.00		Sat 7/9/22	✓
32010001	Linda Jones	4444 DRY FORK ROAD GEORGE WEST, TX	Inactive	Net 20	2710270	\$ 0.00	\$ 0.00		Fri 11/26/21	✓

Pathway: Accounts > Order Processing

### Accounts - Logic Updated to Reason Codes in View Change History and Service Additional Fields Screens (16333)

The Reason Code field in the View Change History and Service Additional Fields screens now allows users with permission 392 (Edit Reason Code in Sales Results and History) to edit the code to another of the same type.

**HIGHLIGHTS**  
 Account is significantly past due

**PENDING**

1298	test	Isabel Navarro	02/09/2024 8:00 am
1297	Introduction	Allena Somers	02/09/2024 10:00 am
1299	test	Isabel Navarro	02/12/2024 9:00 am
1511	Customer Request	House Acct non System	07/05/2023 11:06 am test
1529	Customer Request	House Acct non System	01/12/2024 7:16 am Customer Request from Portal.
15114	Document Approved	House Acct non System	02/01/2024 12:54 pm Proposal or Service agreement 3578 - Approved. Site: Navusoft - Demo at address Post Oak Blvd, Houston
15115	Document Approved	House Acct non System	02/01/2024 1:34 pm Proposal or Service agreement 1521 - Approved. Site: Navusoft - Demo at address Post Oak Blvd, Houston
59334	Adjustment-Commercial	Isabel Navarro	01/16/2024 Amount: \$ 0.00, Note:
59337	Adjustment-Residential	Isabel Navarro	01/18/2024 Amount: \$ 0.00, Note:

**ACTIVE SERVICES (5)** Standard

**TOTAL RECURRING \$ 125.55**

QTY	SERVICE CODE	SERVICE ID	FREQUENCY	SCHEDULE	RATE	WO MIN.	START DATE	END DATE	CONTRACT EXP.
1	10 Yard Open Top Service	D2FC	On Call		\$ 0.00 per month		10/27/21	10/27/27	
1	30 Yard Compactor Service	801A	On Call		\$ 0.00 per month		04/01/23	10/27/27	
1	2 Yard Trash Service	E52C	1x per week	M	\$ 125.55 per month		10/01/23	10/27/27	
15	15 Yard Open Top Service							10/27/27	

**RIGHT CLICK**  
 Edit  
 Reverse  
 Create On Call Order  
 Add Site Service Discount  
 Transfer Service  
 View Billing History  
 View Change History  
 View Routing History  
 View Service History

**SERVICE ADDITIONAL FIELDS**  
 REASON CODE: ADD-Change in LOB/Equip  
 PO NUMBER  
 BLANKET PO  
 DESTINATION/ORIGIN

Pathway: Accounts > Customer Service Screen

### AR History (Invoice Adjustment) - Screen Changes for Surcharges and Taxes (16330)

The Invoice Adjustment screen has been updated to order surcharges and taxes by the service or charge code they are attached to.

AR HISTORY

CURRENT	1-30 DAYS	31-60 DAYS	61-90 DAYS	91-120 DAYS	120+ DAYS	TOTAL
910.15	0.00	0.00	0.00	0.00	0.00	910.15

Limit to open items

STATEMENT INVOICE AUTO APPLY BALANCE WRITE OFF PAYMENT METHODS (0)

DATE 02/14/24 DUE DATE 03/05/24

INVOICE ADJUSTMENT - 891672 - 2/14/24 - \$ 910.15 - CREATED BY ALIENA SOMERS ON 2/16/24 1:37 PM

REASON CODE PERIOD 2024-02 NOTE

CREDIT ENTIRE INVOICE

DATE	SITE ID	SITE NAME	WO #	QUANTITY	DESCRIPTION	INVOICE AMOUNT	PREVIOUS ADJUSTMENTS	PENDING ADJUSTMENTS	REJECTED ADJUSTMENTS	ADJUSTMENT AMOUNT
02/12/24	49043001	Construction & Rem...	7422590	1	Roll Off Delivery	\$ 50.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
02/13/24	49043001	Construction & Rem...	7422591	2.3	Roll Off Disposal Per...	\$ 69.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
02/14/24	49043001	Construction & Rem...	7422592	1	Roll Off Haul	\$ 300.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
02/14/24	49043001	Construction & Rem...			Dayton Franchise Fee	\$ 15.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
02/14/24	49043001	Construction & Rem...			Fuel Surcharge-Roll ...	\$ 9.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00

TOTAL

POST

Pathway: Accounts > Customer Service Screen > AR History > (right click on invoice) View Details / Adjust Invoice

## Accounts - Updates to Site Search (16272)

Two new filter options, "Inactive More Than 60 Days" and "Inactive Less Than 60 Days," have been included in the Status drop down menu on the Site Search screen. This filter is not applied if both options are selected at the same time.

18535001 SUNLAND FIELD SERVICE

1 of 2 1234 W LUTCHER DRIVE (2) ORANGE, TX 77632

ACCESS (2217 BOWIE LOOP) TR

Active

DIVISION DAYTON

SERVICE REGION DAYTON OPEN MARKET

SALES REP House Account

OLD ID DAY-416

DAYTON COUNTY

SITE SEARCH

+ Inactive More Than 60 Days COM, RO

SITE ID

18535001

18535002

All

Active

Exempt

Prospect

Site Credit Hold

Vacant

Vacation Hold

Inactive More Than 60 Days

Inactive Less Than 60 Days

OLD ID	ADDRESS	SITE CLASS	SALES REP	DIVISION
DAY-416	1234 W LUTCHER... ORANGE, TX 77...		House Account	DAYTON
DAY-23352	1111 COUNTY R... DAYTON, TX 775...		House Acct non System	DAYTON

START DATE END DATE CO

05/29/23

Feb 2

Feb 9

Feb 16

Displaying 2 of 2

Pathway: Account > Customer Service Screen > Site (link); Accounts > Search (Site)

## Service Record - Display Signature Omit Reason (16355)

In NavuNav, if the driver has chosen a reason code for not capturing the customer's signature, the reason code will be displayed in the Completion tab of the Service Record.

**EDIT SERVICE RECORD**

Example Site INC  
1234 Navu Way  
Pearland, TX 77584  
PHONE (555) 555-1234  
CREATED BY Paul Jones on 2/20/24 9:19 am  
ORDER REASON

WORK ORDER 7462302 QTY 1 SERVICE CODE 30 Yard Open Top Service EQUIPMENT 30YD

ORDER NOTES

PO NUMBER EXTERNAL ID

SCHEDULED DATE 02/20/24 Tuesday ROUTE HOU 301 SEQUENCE 0

WORK STATUS Service Completed EXCEPTION REASON

[Update History](#) Test2 Dispatcher User on 2/20/24 12:2

Charges \$ 237.15 Source Location Disposal / Ship Payments **Completion** Attachments Labels

START 02/20/24 12:28 pm Test2 Dispatcher User - Dispatch setting status to IN PROGRESS  
END 02/20/24 12:29 pm Test2 Dispatcher User - Dispatch setting status to SERVICE COMPLETED  
DISPOSAL ARRIVAL 02/20/24 12:29 pm to HOMEBASE

No Driver Signature / No Customer Signature - Omit Reason: Unable to Sign

COMPLETION/EXCEPTION NOTES

Pathway: Service Record > Completion (tab)

## Active Services (Accounts) - 'Per Unit Rate' Column Added (16392)

A 'Per Unit Rate' column has been added to the Active Services section of the Customer Service screen when the Standard view is used.

48987

Navu Waste Solutions

70

NavuNav Ct

Houston, TX 77088-2256

TERMS

Net 20

INVOICE DELIVERY

PRINTED

Active

DIVISION

HOUSTON

ACCOUNT MGR

House Account

CLASS

ROLL OFF-TEMP

BILL GROUP

HOU-RO ARREARS

1 of 1

✓

NavuNav Ct

Houston, TX 77088-2256

Harris County Parkland Place

US

Active

DIVISION

SERVICE REGION

SALES REP

SOURCE

GENERATOR

SURCHARGE GRP

TAX REGION

✓

CURRENT

1-30

31-60

61-90

91-120

120+

TOTAL

0.00

0.00

0.00

0.00

819.85

0.00

819.85

Auto Pay Not Enabled

HIGHLIGHTS

PENDING

!

Account is significantly past due

!

On call service no activity since 10/17/2023 12:00 AM (127 days ago)

!

On call service no activity since 10/17/2023 12:00 AM (127 days ago)

Active Services (2)

Standard

TOTAL RECURRING \$ 660.00

QTY

SERVICE CODE

SERVICE ID

FREQUENCY

SCHEDULE

PER UNIT RATE

RATE

WO MIN.

START DATE

1

10 Yard Open Top Service

E255

On Call

\$ 60.00

\$ 60.00 per month

02/01/24

3

30 YD Open Top Minimum Charge

BBA1

On Call

\$ 200.00

\$ 600.00 per month

\$ 500.00

02/01/24

CALENDAR

February, 2024

EVENTS

Text Message

SUN

MON

TUE

WED

THU

FRI

Jan 28

Jan 29

Jan 30

Jan 31

Feb 1

## Accounts Screen - Improvement to 'Add Service Note' in Service Additional Fields Screen (16346)

The Services Notes section of the Service Additional Fields screen has been enhanced to open a new, separate 'Add Service Note' editor, which improves the process of adding service notes.

**SERVICE ADDITIONAL FIELDS**

REASON CODE: CHG-Price Increase

PO NUMBER:

BLANKET PO:

**SERVICE NOTES** +

START DATE ↓	END DATE	NOTE

**ADD SERVICE NOTE**

START DATE: 02/28/2024

END DATE: 03/15/2024

NOTE: "Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum

**SAVE**

Pathway: Customer Service Screen > Active Services (Section) > Service Additional Fields

## Account Details - Screen Improvement (16441)

In the Account Details section of the Customer Service screen, Paper Bill Fee has been relocated to display under Invoice Delivery. Additionally, the red font has been enhanced.

**49063 Starbucks**

1234 S Navusoft Blvd  
Alhambra, CA 91803-3101

**TERMS** Net 20

**INVOICE DELIVERY** PRINTED

**PAPER BILL FEE** \$ 2.50

**Active**

**DIVISION** QAWASTE

**ACCOUNT MGR** Aliena Somers

**CLASS** COMMERCIAL

**BILL GROUP** QA Billing Cycle

**ADVANCE - MONTHLY** Billed Thru Date None

**NEXT INVOICE DATE** Feb 01, 2024 BATCH-25789 (not started)

**SOURCE** Call In

**REBATE PAYMENT** ACH

Pathway: Accounts > Customer Service Screen

## Account Request Management - Screen Enhancements (16476)

The following updates have been applied to the Account Request Management screen:

1. Date formatting has been updated to display the first three characters of the day of the week. This also applies

to the 'Completed On' date.

- The Account / Site column has been improved to include a ' / ' between the account and site.
- A "Completion Note" column has been added, visible when the Status filter is set to any of the completed options. Additionally, a "Status" column will also be shown after the "Note" column when the Status filter is set to "Not Completed."
- "Completed By" and "Completed On" columns have been updated to display when the Status filter is set to any of the completed options.

ACCOUNT REQUEST MANAGEMENT

ACCOUNTS > ACCOUNT REQUEST MANAGEMENT

DIVISION

ASSIGNED TO

TYPE

STATUS

All

All

Completed in Last 90 Days

Search

ID

TYPE

ASSIGNED TO

DATE

ACCOUNT/ SITE

CONTACT

NOTE

COMPLETION NOTE

COMPLETED BY

COMPLETED ON

1480

Customer Request

John Doe

Mon 10/21/24 02:10 pm

48530 Lorene Jones / 48530001 Lorene Jones

Lorene Jones

how do i change my pass...

John Doe

Mon 10/21/24 10:10 am

1482

Customer Request

John Doe

Tue 10/22/24 12:10 am

31021 Patrick Mark / 31021001 Patrick Mark

Mark PATRICK

Account and service to en...

CALLED AND LVM REGAR...

John Doe

Thu 10/24/24 08:10 am

1481

Customer Request

John Doe

Mon 10/21/24 11:10 pm

26517 Ashley Gates & Robert Smith / 26517001 Ashley Gates & Robert Smith

Ashley Gates & Robert Smith

Hello my trash hasn't bee...

John Doe

Thu 10/24/24 10:10 am

1483

Customer Request

John Doe

Thu 10/24/24 04:10 pm

42240 Waldock, LTD / 42240001 Waldock, LTD

Waldock, LTD

Please resume service for ...

John Doe

Thu 10/24/24 01:10 pm

1484

Customer Request

John Doe

Fri 10/25/24 09:10 am

47776 CITY OF BROOKSIDE VILLAGE / 47776001 CITY OF BROOKSIDE VILLAGE

CLEO RODRIGUEZ

We DID NOT get a trash ...

John Doe

Fri 10/25/24 07:10 am

1485

Customer Request

John Doe

Sat 10/26/24 01:10 am

39855 The Cleaners / 39855006 Stream Co.

The Cleaners

Call 3619061468 so i can ...

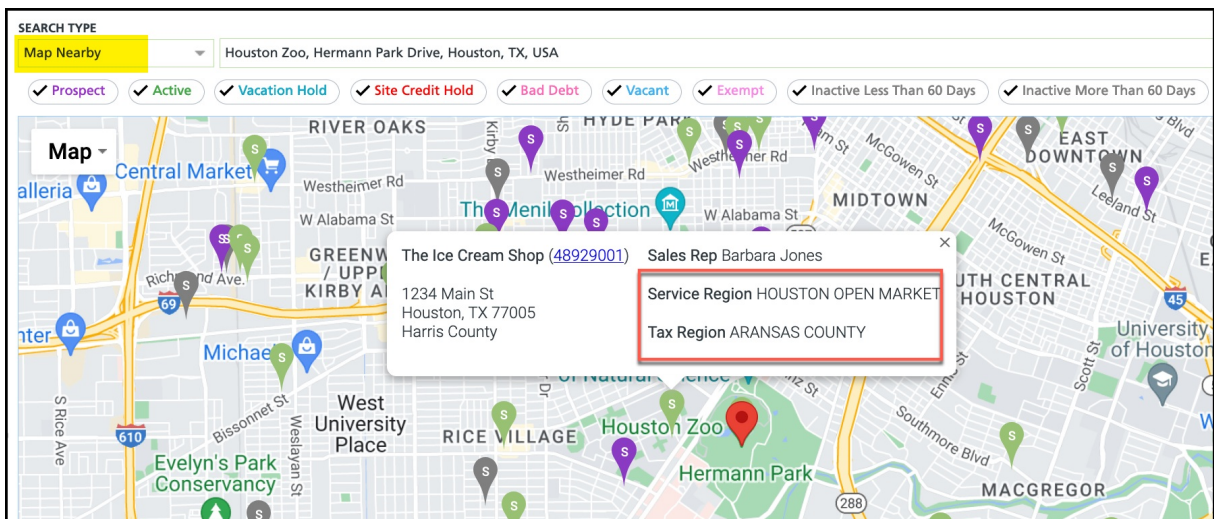
John Doe

Sat 10/26/24 07:10 am

Pathway: Accounts > Account Request Management

## Map Nearby (Search) - Tooltip Updated (16484)

The tooltip that displays for nearby service locations to a searched location has been updated to include its Service Region and Tax Region information.



Pathway: Accounts > Search

## Create On Call Order - Update to Quantity Field (16552)

The logic governing the Quantity field in 'Create On Call Order' has been updated to display either null or '1' depending on the service quantity.

- Null/blank is displayed if the service quantity is greater than "1."
- "1" is displayed if the service quantity is equal to "1."

**48903 Example Account 1**  
 1234 Cincinnati Dayton Rd  
 West Chester, OH 45069-3841  
 US  
 TERMS: Net 20  
 INVOICE DELIVERY: Printed  
 DIVISION: DAYTON  
 ACCOUNT MGR:  
 CLASS: COMMERCIAL  
 BILL GROUP: DAY-COMM MONTHLY ADVANCE  
 ADVANCE - MONTHLY Billed Thru Date Sep 30, 2023  
 CURRENT: 0.00  
 1-30: 0.00  
 31-60: 0.00  
 61-90: 0.00  
 91-120: 0.00  
 120+: 508.42  
 TOTAL: 508.42  
 Auto Pay Not Enabled

**48903001 Example Account 1**  
 1234 Cincinnati Dayton Rd  
 West Chester, OH 45069-3841  
 Butler County  
 US

**HIGHLIGHTS**  
 Account is significantly past due

**PENDING**

**ACTIVE SERVICES (2)** Standard TOTAL RECURRING \$ 182.50

QTY	SERVICE CODE	SERVICE ID	FREQUENCY	SCHEDULE	PER UNIT RATE
1	2 Yard Trash Service	743F	1x per week	F	\$ 52.50
2	20 Yard Compactor Service	C738	On Call		\$ 65.00

**CALENDAR** March, Fe, Me

**CREATE ON CALL ORDER**

SCHEDULE DATE: 03/22/24 Friday  
 SERVICE CODE: 20 Yard Compactor Service  
 ORDER TYPE:  
 QUANTITY:  
 REQUESTED BY:  
 CONTACT:  
 REASON CODE:  
 ORDER NOTES:  
 PO NUMBER:  
 BLANKET PO:  
 EXTERNAL ID:  
 ROUTE:  
 CHARGES:  
 Charges must match Equipment  
 Charges must match Material  
 GROSS QTY: NO CHARGE QTY: CHARGE QTY: UOM: CHARGE CODE: PER UNIT: VENDOR RATE: MINIMUM TYPE: MINIMUM: TOTAL:

Pathway: Accounts > Customer Service Screen > Create On Call Work Order

## AR History - Logic Updated to 'Viewed Notification' Status Icon (16537)

The logic for the notification icon indicating when a customer has viewed the invoice has been updated. The email icon will turn green (indicating the invoice has been read) under the following circumstances once the invoice is viewed from:

- The original notification link
- The invoice reminder email link
- The past due reminder email link
- Manually emailing the invoice
- Customer Portal

The email icon **will not** display green for the following reasons:

- Viewing the email PDF attachment (if the account is set to include the attachment).
- Viewing the invoice from a URL that was copied in Navusoft and emailed to the customer.

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

508.42

508.42

☑ Limit to open items

STATEMENT

INVOICE

AUTO APPLY

BALANCE WRITE OFF

PAYMENT METHODS (0)

🔍

Search

🔍

✕

🔄

DATE

↓

DUE DATE

PERIOD

SITE ID

TYPE

REFERENCE NO

AMOUNT

APPLIED AMOUNT

BALANCE

09/01/23

09/21/23

2023-09

Invoice

884490

497.97

497.97

12/01/22

12/21/22

2022-12

Invoice

850046

10.45

10.45

Viewed by 03/22/2024 1:55 pm

Pathway: Accounts > Customer Service Screen > AR History

## Account Calendar - Logic Updated to Event Sorting in Calendar (16489)

Calendar visibility has been enhanced for days with multiple events and user views at a site. Key improvements include:

- **User views**
  - If more than one user has viewed the site, a total count of user views will display. Hovering over the count will display the list of users and their last viewed time. Previously, these were individually logged.
- **Additional Events**
  - Additional events are displayed using event type icons. Hover over the icon to reveal a tooltip containing the event details. Otherwise, single-click on the +23 Events (for example) or one of the icons to open a dialog with the full list of events for the day.

CALENDAR					EVENTS				
March, 2024					Appointment, AR, Cancellation, Complaint, Er				
SUN	MON	TUE	WED	THUR	FRI	SAT	SUN	MON	TUE
Feb 25	Feb 26	Feb 27	Feb 28	Feb 29	Mar 1	Mar 2	Mar 3	Mar 4	Mar 5
Mar 6	Mar 7	Mar 8	Mar 9	Mar 10	Mar 11	Mar 12	Mar 13	Mar 14	Mar 15
Mar 16	Mar 17	Mar 18	Mar 19	Mar 20	Mar 21	Mar 22	Mar 23	Mar 24	Mar 25
Mar 26	Mar 27	Mar 28	Mar 29	Mar 30	Mar 31	Apr 1	Apr 2	Apr 3	Apr 4

Pathway: Accounts > Customer Service Screen > Account Calendar

## Site Status - "Bad Debt" No Longer Available as a Site Status (16541)

When an account with a single site is updated to a "Bad Debt" status, the logic has been updated to prevent the Site

status from being changed to "Bad Debt." Furthermore, "Bad Debt" is no longer an available status in Site Status History.

SITE STATUS HISTORY

SITE STATUS	SALE STAGE	UPDATED ON	EFFECTIVE DATE	USER ID	NOTE
Active		Oct 19, 2023	Oct 19, 2023	Aliena Somers	

STATUS

Active

Inactive (Requires no active services)

Prospect (Requires no active services)

Active

Vacation Hold

Site Credit Hold

Vacant (Requires no active services)

Exempt (Requires no active services)

SALES STAGE

EFFECTIVE DATE

NOTE

SAVE

Pathway: Accounts > Customer Service Screen

### Active Services (Accounts) - Functionality Added to Link Site Services (16502)

Functionality has been added to enable the linking of site services. When an active service is added to, or already exists on an account, supplementary services like a "locking bar" can be included and associated with it. Upon linking services, a parent/child hierarchy is formed, with the "child" service code referencing the Service ID of the corresponding "parent" service code.



Further documentation, including setup requirements and logic can be found here: [Site Service Linking](#)

Auto Pay Not Enabled

HIGHLIGHTS

PENDING

ACTIVE SERVICES (2)

Standard

TOTAL RECURRING \$ 1,977.00

QTY	SERVICE CODE	SERVICE ID	FREQUENCY	SCHEDULE	PER UNIT RATE	RATE
3	3 Yard Trash Service	440E	1x per week	T	\$ 584.00	\$ 1,752.00 per month
3	Locking Bar (Linked with service 440E)	F174			\$ 75.00	\$ 225.00 per month

CALENDAR

March, 2024

EVENTS

Appointment, AR, Cancellation, Complaint, Er

SUN

MON

TUE

WED

THU

Feb 25

Feb 26

Feb 27

Feb 28

Feb 29

Mar 2

Mar 4

Mar 5

Mar 6

Mar 7

Pathway: Accounts > Customer Service Screen > Active Services; Setup > Services > Service Code

## Search Accounts - Improvements Made to Search Screen (16466)

The following enhancements have been applied to the Search screen:

1. Keyboard-friendly:

- Each search field on the Search screen supports keyboard entry and responds to the tab key. Upon typing in a search field, the system will generate a list of matching options. Navigate down the list using the arrow keys, and press "Enter/Return" to select the desired option. Users can then utilize the Tab key to move to the next field.
- Search results allow for user to navigate the list with arrow buttons and make a selection using "Return/Enter" key.
- Keyboard shortcut to open the Search screen:
  - Mac: Opt + Shift + S
  - PC: Alt + Shift + S

2. Work Orders, Invoices, References, and Purchase Orders have been separated into individual searchable options.

3. Status filters have been added and are displayed below the Search Type and Search field. By default, all filters are applied. To make selections, use either the Tab and Enter/Return keys or your mouse, then click "Search" to filter the results.

4. Tooltip summary added to returned results and display upon hover.

5. Search results will display inactive accounts/sites at the bottom of the list.



An overview of the enhanced Search screen can be viewed here: [Search Screen](#)

SEARCH TYPE		DIVISION		ACCOUNT CLASS		BILL GROUP			
Accounts		CORPUS, DAYTON, HILL		COMMERCIAL		Annual Billing		SEARCH	
✓ Prospect		✓ Active		✓ Credit Hold		✓ Bad Debt		✓ Inactive	
								4 records	
ACCOUNT ID	NAME	STATUS	OLD ID	ADDRESS	ACCOUNT CLASS	SALES REP	BILL GROUP	TERM	DIVISION
18535	Example Account 4 2 sites	Credit Hold 6 days	DAY-416	1234 COUNTY ROAD 6481 DAYTON, TX 77535-4468	COMMERCIAL	Aliena Somers	Annual Billing	Net 20	QAWASTE
48982	Example Account 3 1 site	Credit Hold 6 days		1111 W Main St Alhambra, CA 91801-3514	COMMERCIAL	House Account	Annual Billing	Net 20	QAWASTE
48983	Example Account 2 1 site	Active 167 days		2222 S Lake Ave Pasadena, CA 91101-3002	COMMERCIAL	House Account	Annual Billing	Net 20	QAWASTE
48990	Example Account 1 1 site	Active 156 days		3333 W Valley Blvd San Gabriel, CA 91776-3760	COMMERCIAL	House Account	Annual Billing	Net 20	QAWASTE

Pathway: Accounts > Search

## Contracts/Proposals (Document Type) - Contracts Not Being Automatically Approved (16531)

An issue has been resolved that prevented proposals and contracts from automatic approval, even when the "Automatic" option was selected in the Document Type Setup. Additionally, in "Update Document Type," the "Automatic" approval selection option has been renamed to "Automatic - Every 5 Minutes".

DOCUMENT TYPE SETUP

+

ID	NAME	FORM TYPE	REASON CODE	IS RENEWAL TYPE
1	A-New Service	Proposal	ADD-Add Svc - New Service	No
11	A-New Service-noPreAuth\Auto an	Service Contract	ADD-Add Svc - New Service	No
21	A-New Service			No
36	Chg Svc-Price Decrease			Yes
48	Chg Svc-Price Decrease			Yes
60	Chg Svc-Price Decrease			Yes
78	Chg Svc-Price Increase			Yes
79	Chg Svc-Price Increase			Yes
80	Chg Svc-Price Increase			Yes
81	Chg Svc-Service Decrease			Yes
82	Chg Svc-Service Increase			Yes
83	Chg Svc-Service Increase			Yes
84	Chg Svc-Service Decrease			Yes
85	Chg Svc-Service Decrease			Yes
86	Chg Svc-Service Increase			Yes
87	End Svc-End Svc			No
88	A-Change in LOB/Equipment			No
89	A-New Business-Acquistion			No
90	A-New Business-From Compe			No

UPDATE DOCUMENT TYPE

?

✕

NAME

Chg Svc-Price Decrease

FORM TYPE

Service Contract

REASON CODE

CHG-Price Decrease

IS RENEWAL TYPE

Yes

IS TEMP

No

PRE-AUTHORIZATION

Not Required

APPROVAL

Automatic - Every 5 Mins

CHECK LIST TYPE

ACTIVE

Yes

Pathway: Setup > Document Formats > Type

## Active Services (Accounts) - Default Rates not Considering Effective Date (16564)

An issue has been resolved where default rates were not considering the effective date.

ADD ACTIVE SERVICE

REASON CODE

ADD-New Business

START DATE

03/27/24 Wednesday

Week 13 (B)

QTY	EQUIPMENT	SERVICE CODE	FREQUENCY	PER UNIT	SERVICE FEES
1	2 Yard FL	2 Yard Trash Service	1x per week	126.0000	126.00 months

SERVICE DAYS

☐ Mon
 ☐ Tue
 ☐ Wed
 ☐ Thu
 ☐ Fri
 ☐ Sat
 ☐ Sun

REQUESTED BY

SERVICE NOTES

☒ FL Delivery

ROUTE

DATE

03/27/24 Wednesday

WORK ORDER NOTES

Map

The A

**Pathway:** Setup > Services > Default Pricing > Service Code

## Contracts (Accounts) - Logic Updated to 'Payment Required' Calculation for Electronic Signatures (16536)

The logic for the "Payment Required" calculation in the Electronic Signature screen has been updated for both scenarios: calculating recurring services without taxes and surcharges, and calculating recurring services with taxes and surcharges. In both cases, the calculation will utilize the rate rather than the per unit rate.

EDIT SERVICE CONTRACT - SIGNATURE (NEW) - 3937

Settings

Services 1

History 7

Attachment

Master Agreement

MAP SERVICE LOCATIONS

SITE ID	START DATE	QTY	SERVICE CODE	FREQUENCY	RATE	VENDOR RATE
48986001		2	2 Yard Trash Service	1x per week	\$ 400.00	month
Total					\$ 400.00	\$ 0.00

ELECTRONIC SIGNATURE

ELECTRONIC SIGNATURE By signing below, you are

(i) agreeing to the change in service described in the Service Agreement below,

(ii) acknowledging receipt of the current Terms and Conditions accompanying the Service Agreement, and

(iii) agreeing to be bound thereto.

PLEASE SELECT SIGNATURE METHOD

☐ Sign
 ☒ Type

NAME

TITLE

PAYMENT REQUIRED

\$461.04

TYPE

NAME

MAKE A PAYMENT

SUBMIT

CLEAR

CLOSE

Pathway: Customer Service Screen > Orders, Quotes and Contracts

## Accounts - Logic Updated to Service Code Field For On Call Work Orders (16611)

Logic has been updated to the creation of on call work orders to auto-populate the Service Code field if the site has only one active service. Otherwise, if there is more than one active service, the Service Code field remains null requiring the user to make a manual selection.

48989

Central Perk

2222 4th St  
White Bear Lake, MN 55110-3044  
US

Active

DIVISION

QAWASTE

ACCOUNT MGR

Alliena Somers

CLASS

ROLL OFF-TEMP

ROLL GROUP

QA Billing Only

TERMS

Net 20

INVOICE DELIVERY

Email with Attachment

CURRENT

0.00

1-30

0.00

HIGHLIGHTS

ACTIVE SERVICES (1)

Standard

QTY	SERVICE CODE
1	10 Yard Open Top Service

CALENDAR

April, 2024

EVENT

SUN

Mar 31

Apr 7

Apr 14

48989001

The Perk

2222 4th  
White Be  
US

1 of 1

PREPAYMENT

PO NUMBER

BLANKET PO

EXTERNAL ID

ROUTE

CHARGES

☐ Charges must match Equipment
 ☐ Charges must match Material

GROSS QTY	NO CHARGE QTY	CHARGE QTY	UOM	CHARGE CODE	PER UNIT	VENDOR RATE	MINIMUM TYPE	MINIMUM	TOTAL

CREATE

Pathway: Accounts > Search > Accounts

## AR History (Accounts) -Default 'Save As' for Invoice Downloads Changed

An enhancement has been applied when downloading invoice files: the default 'Save As' title will now start with the division name, followed by the invoice ID.

**CORPUS**  
6541 Willow Dale Ct  
Liberty Township, OH 45011-9077  
Phone: (777) 777-7777  
JohnDoe@Navusoft.com

**Example Account 6**  
1234 Navu Way  
Corpus Christi, TX 78411

**Statement**

41902	Current	1-30 days	31-60 days	61-90 days	91-120 days	Over 120 days	Total
Example Account 6	0.00	0.00	0.00	0.00	0.00	527.93	<b>527.93</b>

**Limit to Open Items**

Date	Type	Reference	Location	Site Name	Amount	Applied	Balance
10/1/23	Invoice	884157			314.59	0.00	314.59
9/14/23	Invoice	883844			105.74	0.00	105.74
8/10/23	Invoice	883842			107.60	0.00	107.60
					<b>Total</b>		<b>527.93</b>

Pathway: *Accounts > Search > Accounts*

## AR History (Accounts) - Applications To Invoice Screen Updates (16626)

The following enhancements have been applied to the *Applications To Invoice* screen:

- An 'Applied Date' column has been added to show the date of the AR application.
- A 'Running Balance' column has been added and will sort in ascending order.

**AR HISTORY**

CURRENT	1-30 DAYS	31-60 DAYS	61-90 DAYS	91-120 DAYS	120+ DAYS	TOTAL
0.00	1,434.02	0.00	0.00	0.00	308.01	1,742.03

☒ Limit to open items | **STATEMENT** | **INVOICE** | **AUTO APPLY** | **BALANCE WRITE OFF** | **PAYMENT METHODS (0)** | Search | ? | X

DATE ↓	DUE DATE	PERIOD	SITE ID	TYPE	REFERENCE NO	AMOUNT	APPLIED AMOUNT	BALANCE
03/01/24	03/21/24	2024-03		Invoice	895458	1,434.02		1,434.02
01/31/23	02/20/23	2023-01		Invoice	867023	107.67		107.67
01/01/23	01/21/23	2023-01		Invoice	853634	215.34	(15.00)	200.34

**APPLICATIONS TO INVOICE: 853634 - ORIGINAL AMOUNT \$ 215.34**

TYPE	BATCH ID	REFERENCE	BATCH DATE	APPLIED DATE ↑	APPLIED AMOUNT	RUNNING BALANCE
Payment	11276	1224	01/02/2024	04/17/2024	\$ 10.00	\$ 205.34
Payment	11277	1824	01/08/2024	04/17/2024	\$ 5.00	\$ 200.34

Pathway: *Accounts > Search > Accounts > AR History*

## Cancellation Requests (Accounts) - Logic Updated to 'Assigned To' Field (16680)

The 'Assigned To' field in the Create Cancellation Request has been updated to only display a list of users with permissions **162** (Add Cancellation Request) or **163** (Edit/Delete Cancellation Request).

The screenshot shows the 'CREATE CANCELLATION REQUEST' form. The 'ASSIGNED TO' dropdown is highlighted with a red arrow, pointing to the 'PERMISSION SETUP' modal. The modal lists permissions for the 'Accounts' module. Permissions 162 and 163 are highlighted in yellow.

PERMISSION ID	NAME
150	Add Service Audit
151	Edit Service Audit
162	Add Cancellation Request
163	Edit/Delete Cancellation Request
174	Add Rebate Check Prepayment
178	Edit Credit limit
181	Add/Edit Vendor Invoice
182	Add/Edit Expected Vendor Invoice
201	Export Vendor Invoice

Pathway: Accounts > Cancellation Request (menu icon)

## Search (Accounts) - New Search Type Added (16638)

A new Search Type 'Account ID' has been added to Accounts Search and will perform an exact search on Account ID or Old ID.

The screenshot shows the 'SEARCH TYPE' dropdown menu. The 'Account ID' option is selected. Below the dropdown are five buttons: 'Prospect', 'Active', 'Credit Hold', 'Bad Debt', and 'Inactive'. The 'ACCOUNT ID' and 'NAME' columns are visible in the search results table.

ACCOUNT ID	NAME	STATUS
------------	------	--------

Pathway: Accounts > Search > Account ID

## On Call Orders (Accounts) - Destinations Limited Based on Material Information (16605)

The Destination Facility field for On Call work orders and Add/Edit Active Service has been improved to limit what is displayed based on the site's division and type of material being hauled.

CREATE ON CALL ORDER

SCHEDULE DATE

04/22/24 Monday

SERVICE CODE

30 Yard Open Top Service

ORDER TYPE

On Call - RO Swap

QUANTITY

1

REQUESTED BY

CONTACT

REASON CODE

ORDER NOTES

PREPAYMENT

PO NUMBER

BLANKET PO

EXTERNAL ID

ROUTE

MATERIAL

DESTINATION FACILITY

LA TRANSFER STATION

LALANDFILL

QA waste Processing

CHARGES

Charges must match Equipment

Charges must match Material

GROSS QTY	NO CHARGE QTY	CHARGE QTY	UO...
0	0	0	td
1	1	1	ea

ADD ACTIVE SERVICE

REASON CODE

ADD-Add Svc - New Service

START DATE

04/22/24 Monday

Week 17 (B)

QTY

1

EQUIPMENT

30 Yard Open Top

SERVICE CODE

Yard Open Top Service - C&D

FREQUENCY

PER UNIT

0.0000

SERVICE FEES

0.00

month

EQUIPMENT OWNERSHIP

Choose one

REQUESTED BY

SERVICE NOTES

ROUTE

DATE

04/22/24 Monday

WORK ORDER NOTES

RO Delivery

DEFAULT DESTINATION

LALANDFILL - 18 miles (32m)

MAP

Los Angeles

SERVICE CHAR...	RATE	UO...	QTY	MINIMUM	MAX WEIGHT	OVER MAX WEIGHT RATE	WORK TYPES

SAVE

## Sales

### Reports/Accounts - 'Sales Results Net New' Report and Rate History Screen Reason Code Updates (16310)

#### Sales Results Net New

**Pathway:** Reports > Analysis > Sales Results Net New

The Sales Results Net New screen has been updated to include a Reason Code column. If the user has permission 392 (Edit Reason Code in Sales Results and History), the reason code can be edited to another reason code of the same type.

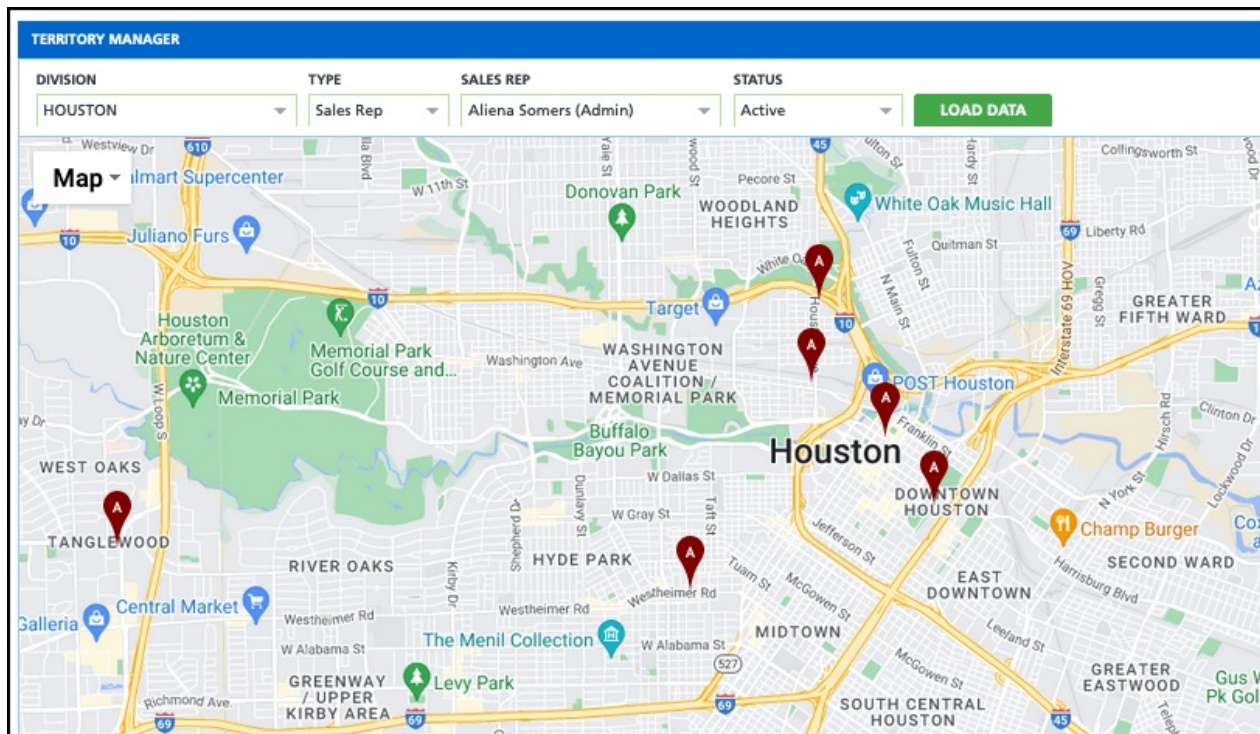


SITE SERVICE RATE UPDATE BATCH: 1045									
GRID VIEW		CHANGE TYPE		AMOUNT		EFFECTIVE DATE			
Extended		Amount		10.00		02/23/2024			
		APPLY		NET VARIANCE		\$0.00			
ACCOUNT ID	ACCOUNT NAME	SITE ID	NAME	CITY	QTY	SERVICE CODE	SERVICE FREQUENCY	CURRENT RATE	
✓ 49030	H K Cafe	49030001	H K Cafe	San Gabriel	1	4 Yard Trash Service	1x per week	\$ 99,999,	
✓ 49030	H K Cafe	49030001	H K Cafe	San Gabriel	1	6 Yard Trash Service	1x per week	\$ 9,999,9	
✓ 49030	H K Cafe	49030001	H K Cafe	San Gabriel	1	8 Yard Trash Service	7x per week	\$ 1,000,0	
✓ 48982	Panda Express	48982001	Panda Express	Alhambra	2	2 Yard Trash Service	2x per week	\$ 43,	
✓ 48982	Panda Express	48982001	Panda Express	Alhambra	1	6 Yard Trash Service	1x per week	\$ 32,	
✓ 48973	Crypto.com Arena	48973001	Crypto.com Arena	Los Angeles	1	4 Yard Trash Service	2x per week	\$ 22,	
✓ 48973	Crypto.com Arena	48973002	Cloned Site	Los Angeles	1	4 Yard Trash Service	2x per week	\$ 22,	
✓ 48981	Tasty Donuts	48981001	Tasty Donuts	Pasadena	1	4 Yard Trash Service	1x per week	\$ 21,	
✓ 49035	Clone Test 2	49035002	Clone Test Site 2	Los Angeles	1	2 Yard Trash Service	2x per week	\$ 20,	
✓ 49035	Clone Test 2	49035001	Clone Test 2	Los Angeles	1	2 Yard Trash Service	2x per week	\$ 20,	

Pathway: Sales > Rate Update Batches > (open) Service Batches

### Sales (Maps) - Territory Manager Not Loading Data (16409)

Previously, when a user filled out the filter fields in the Territory Manager map and selected 'Load Data,' nothing would load. This has been resolved.



Pathway: Sales > Maps > Territory Manager

### Service Agreement (Sales) - Email Notification Updated For Signed Service Agreements (16526)

The formatting of the email notification that a user receives when a service agreement has been signed has been enhanced.

## TONCHIN LA (S49068001) Service Agreement signed

😊 ↶ ↷ ↵



○ SetupSignProposal@navusoft.com <SetupSignProposal@navusoft.com>

Today at 12:00 PM

To: Paul G

John Jones,

3928 was signed by PG on Mar 18, 2024.

Here is a link to the Signed Agreement:

<http://navu-qa.navusoft.net:80/esign/proposal/view/3928/2525B04E-9706-4707-CF2D-CDBF21AC2929>

Signer IP Address: 24.180.57.73

\*Note: This is an automated messaged

Pathway: Sales

## Rate Update Batch (Sales) - Variance Column Sorting Corrected (16648)

An issue has been resolved that prevented the Variance column in the Site Service Rate Update Batch screen from being sorted in ascending or descending order.

SITE SERVICE RATE UPDATE BATCH: 1017											
GRID VIEW		EFFECTIVE DATE									
Standard		NET VARIANCE \$2,175.89		06/01/2023		Search					
<input type="checkbox"/>	SITE ID	NAME	CITY	SERVICE CODE	CURRENT RATE	NEW RATE	VARIANCE	CURRENT WO MINIMUM	NEW WO MINIMUM	CURRENT RECURRING MINIMUM	RECU MIN
<input checked="" type="checkbox"/>	19642001	SHIP OUR STUFF	Dayton	4 Yard Trash Service	\$ 135.00	\$ 141.75	\$ 6.75				
<input checked="" type="checkbox"/>	20582001	OLD RIVER ASSEMBLY	DAYTON	Locking Bar	\$ 10.00	\$ 10.50	\$ 0.50				
<input checked="" type="checkbox"/>	20618001	BETHEL ASSEMBLY OF GOD	Liberty	2 Yard Trash Service	\$ 95.00	\$ 99.75	\$ 4.75				
<input checked="" type="checkbox"/>	20742001	BJ & ZEF GALLEGOS	DAYTON	2 Yard Trash Service	\$ 95.00	\$ 99.75	\$ 4.75				
<input checked="" type="checkbox"/>	20878001	RAYWOOD LIVESTOCK MARKET	RAYWOOD	6 Yard Trash Service	\$ 195.00	\$ 204.75	\$ 9.75				
<input checked="" type="checkbox"/>	20879001	AMERICAN RICE GROWERS CO-OP	RAYWOOD	6 Yard Trash Service	\$ 195.00	\$ 204.75	\$ 9.75				
<input checked="" type="checkbox"/>	21052001	MEMORIAL BAPTIST CHURCH	DAYTON	8 Yard Trash Service	\$ 175.00	\$ 183.75	\$ 8.75				
<input checked="" type="checkbox"/>	21198001	SUPER 90 ADAM'S QUICK STOP	RAYWOOD	4 Yard Trash Service	\$ 135.00	\$ 141.75	\$ 6.75				
<input checked="" type="checkbox"/>	21537001	DAYTON HUFFMAN HORSE CENTER	DAYTON	4 Yard Trash Service	\$ 145.00	\$ 152.25	\$ 7.25				
<input checked="" type="checkbox"/>	21732001	R&T ELLIS EXCAVATING	CLEVELAND	6 Yard Trash Service	\$ 235.00	\$ 246.75	\$ 11.75				
<input checked="" type="checkbox"/>	21747001	SEABERG AGRI SERVICE	DAYTON	4 Yard Trash Service	\$ 135.00	\$ 141.75	\$ 6.75				
<input checked="" type="checkbox"/>	21754001	SUNBELT RENTALS INC	DEVERS	8 Yard Trash Service	\$ 250.00	\$ 262.50	\$ 12.50				
<input checked="" type="checkbox"/>	21796001	IJOE LOCAL 450 APPRENTICESHIP	DAYTON	2 Yard Trash Service	\$ 95.00	\$ 99.75	\$ 4.75				
<input checked="" type="checkbox"/>	21805001	TOPS	HUFFMAN	6 Yard Trash Service	\$ 185.00	\$ 194.25	\$ 9.25				
<input checked="" type="checkbox"/>	21814001	GIPSON JOJANNA	RAYWOOD	2 Yard Trash Service	\$ 95.00	\$ 99.75	\$ 4.75				
<input checked="" type="checkbox"/>	21944001	THE PALMS	DAYTON	2 Yard Trash Service	\$ 70.00	\$ 73.50	\$ 3.50				
<input checked="" type="checkbox"/>	22788001	RANGER ROOFING AND CONSTRUCTION	DAYTON	4 Yard Trash Service	\$ 135.00	\$ 141.75	\$ 6.75				
<input checked="" type="checkbox"/>	23269001	PICKETT FRNIF	LIBERTY	4 Yard Trash Service	\$ 115.00	\$ 120.75	\$ 5.75				
298 records / 285 selected / 298 visible											

Pathway: Sales > Rate Update Batches

## Contract Expiration - Type Column Was Not Populating (16675)

Previously, the Contract Expiration screen was not displaying the contract type in the Type column. This has been resolved.

DIVISION	HOUSTON	LOB	Commercial, Document Destructi	LOAD
		MONTHLY REVENUE		UNDER CONTRACT
Alek Orloff (CFO)			\$ 102.50	\$ 0.00 (0)
Alexis Garza (CSR)			\$ 629.32	\$ 0.00 (0)
Alice Cuevas (CSR)			\$ 376.00	\$ 0.00 (0)
Aliena Somers (Admin-NS)			\$ 4,459.59	\$ 120.00 (1)
Andi Gilmore (CSR)			\$ 426.22	\$ 142.45 (1)
Carolyn McNeil (CSR)			\$ 69.56	\$ 0.00 (0)
Charisma Reyna (CSR)			\$ 198.00	\$ 0.00 (0)
Charlie Weller (Ops Supervisor)			\$ 1,171.58	\$ 0.00 (0)
Chris Fairchild			\$ 333.13	\$ 0.00 (0)
Dave Pike (Support Analyst)			\$ 476.34	\$ 0.00 (0)
David Navarro (Admin-NS)			\$ 160.50	\$ 0.00 (0)
Deara Nikolouzos (Sales Rep)			\$ 60.00	\$ 0.00 (0)
Emilio Natarén (Admin-NS)			\$ 60.00	\$ 0.00 (0)
House Account (House Account)			\$ 49,089.79	\$ 0.00 (0)
House Acct non System (House Account)			\$ 514,336.54	\$ 4,219.30 (7)

SITE ID	EXT ID	TYPE	STATUS	NAME	CITY	MONTHLY REV.	TERM	EXPIRATION DATE ↑
43194001	PRLD25-119	Service Contract - signature... Chg Svc-Service Increase	Active	TEXAS LONESTAR CUT STONE LLC	PEARLAND	\$ 213.79	36	11/02/2025
43734001	PRLD622-902	Service Contract - signature... A-New Service-noPreAuth...	Active	ENERGY RENTAL SOLUTIONS	PEARLAND	\$ 307.64	60	11/03/2026

Pathway: Sales > Contract Expiration

## Operations

### Inbound/Outbound - Auto Print Scale Ticket for Outbound Orders (16244)

The logic for outbound work orders has been updated so that the scale ticket will automatically print when the work status is set to 'Shipped - Completed.'

INBOUND / OUTBOUND

OPERATIONS > INBOUND / OUTBOUND

LOCATION

Republic

In Progress

Search

Inbound

Outbound

History

ORDER #	DATE ↑	VEHICLE	DESTINATION	TRANSPORT INFO	SERVICE INFO	MATERIALS / ADJUSTMENTS	WEIGHT	ADDITIONAL INFO	NOTES
41153 Outbound Order: 7361885 Completed	01/30/24 Start: 8:55 ... End: 3:20 pm	Method: Truck	HOMEBASE	Method: Truck	Manifest Consolidation Transfer	MSW	Outbund Gross: 2.3 tons Outbund Tare: 1.3 tons Outbund Net: 1 tons Gross: 2,500 lbs Tare: 5,200 lbs Net: -2,700 lbs	LOB: Medical Waste	

Pathway: Operations > Inbound / Outbound

### Dispatch - Excel Export Format Update for Completed Stops (16414)

'Sequence' and 'Completion Time' have been separated into two separate columns in the Completion Report export.



Columns have been manually hidden in the screenshot for purposes of capturing the change.

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	
HOU 201	1		43180001 Example Account 1 1234 WAGON TRAIL, PEARLAND	Thu 2/29/24	1/15/24 3:55am	7286330	Scheduled Service COMPLETED 10:46 am	FL Service	1	2 Yard FL		
HOU 201	2		43473007 * Example Account 2 1111 KINGSLEY, PEARLAND	Thu 2/29/24	1/15/24 3:55am	7286354	Scheduled Service COMPLETED 10:46 am	FL Service	2	6 Yard FL		
HOU 201	3		43383001 * Example Account 3 Example Account 3	Thu 2/29/24	1/15/24 3:55am	7286341	Scheduled Service COMPLETED 10:46 am	FL Service	2	8 Yard FL		

D23												
	A	C	D	E	I	K	N	O	P	Q	R	
1	Route	Scheduled Date	Created On	WO#	Equipment	siteid	city	state	postalcode	seq	completiontime	
2	HOU 201	Thu 2/29/24	1/15/24 3:55am	7286330	2 Yard FL	43180001	PEARLAND	TX	77584-9090	1	10:46 AM	
3	HOU 201	Thu 2/29/24	1/15/24 3:55am	7286354	6 Yard FL	43473007	PEARLAND	TX	77584	2	10:46 AM	
4	HOU 201	Thu 2/29/24	1/15/24 3:55am	7286341	8 Yard FL	43383001	PEARLAND	TX	77584	3	10:46 AM	
5												
6												
7												
8												
9												
10												
11												
12												
13												

Pathway: Operations > Dispatch > Services List (Serviced)

## Dispatch (Services List) - 'Frequency' Column Added (16462)

A 'Frequency' column has been added to the Dispatch 2 view of the Services List screen.

SERVICES LIST												
Dispatch 2		Select Print Format		SET POSTING		EDIT		PRINT COMPLETED		Search		
ROUTE	SEQ	LOCATION	ADDRESS	SERVICE REGION	ORIGINAL DATE	SCHEDULED DATE	WO TYPE	SERVICE TYPE	MATERIAL TYPE	QTY	FREQUENCY	EQUIPMENT
HOU 202		45275001	Pearland	PEARLAND MUNICIPAL		Wed 3/6/24	Scheduled Service	FL Service	MSW	2	6x per week	8 Yard FL
HOU 202		43277001	STE A, PEARLAND	PEARLAND MUNICIPAL		Wed 3/6/24	Scheduled Service	FL Service	MSW	2	4x per week	8 Yard FL
HOU 202		43883001	PEARLAND	HOUSTON OPEN MARKET		Wed 3/6/24	Scheduled Service	FL Service	MSW	1	6x per week	8 Yard FL
HOU 202		44530001	Pearland	HOUSTON OPEN MARKET		Wed 3/6/24	Scheduled Service	FL Service	MSW	1	6x per week	8 Yard FL
HOU 202		43585001	HOUSTON PKWY E, PEARLAND	PEARLAND MUNICIPAL		Wed 3/6/24	Scheduled Service	FL Service	MSW	2	3x per week	8 Yard FL

Pathway: Operations > Dispatch > Services List

## Route Management - Updates to Pending Tab (16342)

The Pending tab in Route Management has been enhanced to handle stops with servicing spanning multiple days. In this scenario, the service location is listed once on the screen, and the schedule records are grouped. As each schedule record is individually posted to a route, "Posted" will display in its row and the record can no longer be edited from the Pending screen. Once all schedule records for a location have been posted to a route, the service location will no longer display on the Pending screen.

When assigning a route to a servicing date, a "Suggested" route is provided by identifying the nearest active site service schedule for the same line of business and day of the week as the selected record, based on geographic distance. If no matching schedule is found, no suggestion is provided.

<div> <div>Pending</div> <div>Current</div> <div>Re-Number</div> </div>									
HOUSTON		HOUSTON OPEN MARKET		Commercial	Monday, Tuesday, Wed	LOAD		COUNT 35	
LOCATION	ADDRESS	QTY	SERVICE CODE	FREQUENCY	START DATE	ROUTE	SEQUENCE	WEEK OF MONTH	
48532001 Navu Recycling	1234 Kingsbrook Rd Houston, TX 77024	13	4 Yard Trash Service 4 Yard FL MSW	3x per week M,W,F	Mon 02/05/24 Wed 02/07/24 Fri 02/02/24	HOU 206 HOU 206 HOU 206	0 0 0	Posted	
48644001 Navu Sanitation	1234 San Felipe St Houston, TX 77057-3064	1	6 Yard Trash Service 6 Yard FL MSW	2x per week T,F	Tue 02/06/24 Fri 02/02/24	HOU 206 HOU 206	0 0	Posted	
48806001 Central Perk	1234 Kirby Houston, TX 77098	1	3 Yard Trash Service 3 Yard FL MSW	5x per week M,T,W,H,F			0	Posted	
							0	Posted	
							0	Posted	
							0	Posted	
							0	Posted	
48843001 Delta Tire Service	1234 Wilson St Houston, TX 77023-3540	1	4 Yard Trash Service 4 Yard FL MSW	1x per week F	HOU 201 HOU 203 HOU 204 HOU 205R HOU 206 HOU DUMPSTER DEL/REM			Posted	
46536001	1234 Washington Road	1	2 YD No Work Class	1x per week			0	Posted	

Pathway: [Operations > Route Management](#)

Related Articles: [Pending \(Tab\) - Review and Assign Stops to a Route](#)

## Dispatch - Enhancement to Screen for Unassigned Routes (16501)

On the Dispatch screen, if a route is not assigned to a record, 'No Route Assigned' will be displayed in red text, and the background color of the row will be highlighted in red.

DISPATCH

FROM

03/12/24

TO

03/12/24

DIVISION

QAWASTE

LINE OF BUSINESS

Commercial

Standard

Select Route Sheet

Search

ROUTE ↑

TRUCK

DRIVER

PRE TRIP

POST TRIP

OPTIMIZED

SCHEDULED

SERVICED

PENDING

QAWASTE - Commercial - Tuesday Mar 12, 2024 ( 0 of 2 Completed)

LA 101

Test2 Dispatcher User - Dispatch

View Optimization Res...

1

0

1 (100%)

NO ROUTE ASSIGNED

2

0

2 (100%)

Pathway: [Operations > Dispatch](#)

## Dispatch - Enhancements to Fuel Record Screen (16430)

The Fuel Record screen in Dispatch has been updated with the following enhancements:

1. An attachments icon now displays next to the attachments column, enabling users to upload attachments to the fuel record.
2. Users have access to a view/download feature, allowing them to both view photos and download attached files.

DISPATCH

FROM

TO

03/01/24

03/14/24

DIVISION

QAWASTE, HOUSTON, DAYTON, CORPUS

LINE OF BUSINESS

Commercial, Roll Off, Miscellaneous

Route Productivity

Select Route Sheet

ROUTE

DRIVER

PAYROLL

LOG IN

PRE TRIP

FIRST

LUNCH

LUNCH

LAST

TRUCK / ODOMETER

FUEL

POST TRIP

LOG OUT

PAYROLL

ALVARO

Dave Pike - Support Analyst (Not Available)

?

Alvaro / 0

0

?

CORPUS - Roll Off - Monday Mar 11, 2024 ( 0 of 1 Completed)

?

0

?

ALVARO

Dave Pike - Support Analyst (Not Available)

?

Alvaro / 0

0

?

CORPUS - Roll Off - Tuesday Mar 12, 2024 ( 0 of 1 Completed)

?

0

?

ALVARO

Dave Pike - Support Analyst (Not Available)

?

Alvaro / 0

0

?

CORPUS - Roll Off - Wednesday Mar 13, 2024 ( 0 of 1 Completed)

?

0

?

ALVARO

Dave Pike - Support Analyst (Not Available)

?

Alvaro / 0

0

?

CORPUS - Roll Off - Thursday Mar 14, 2024 ( 0 of 1 Completed)

?

0

?

ALVARO

Dave Pike - Support Analyst (Not Available)

?

Alvaro / 0

0

?

DAYTON - Commercial - Friday Mar 1, 2024 ( 0 of 6 Completed)

?

0

?

DAY CO SUB OUT

?

0

?

DAY 205

?

0

?

DAY 204

?

0

?

DAY 203

?

0

?

DAY 202

?

0

?

DAY 201

?

0

?

DAYTON - Commercial - Saturday Mar 2, 2024 ( 0 of 3 Completed)

?

0

?

DAY CO SUB OUT

?

0

?

DAY 202

?

0

?

DAY 201

?

0

?

DAYTON - Commercial - Sunday Mar 3, 2024 ( 0 of 1 Completed)

?

0

?

DAY CO SUB OUT

?

0

?

DAYTON - Commercial - Monday Mar 4, 2024 ( 0 of 4 Completed)

?

0

?

FUEL RECORD

+

?

×

TRUCK	FUEL SOURCE	FUEL TYPE	VOLUME	UOM	COST	ATTACHMENT	NOTE	DATE	CREATED BY	CREATED ON	
774	new fuel	Electric	92.00	gallon	0.00	6D1E9878-EAD4-...		03/01/2024	Olivia Paige	03/01/2024 9:53 am	View
774	Mobil	Diesel	88.00	gallon		BigDumpster.png...	Testing N...	03/01/2024	Paul Gonz...	03/06/2024 2:57 pm	View

1

2

SAVE

Pathway: Operations > Dispatch > Fuel Record (Route Productivity view > Fuel Column)

## Route Management - Performance Improvement to Pending Routes Map (16488)

Loading performance has been enhanced for the Pending Routes Map, which is displayed when a site is selected from the upper grid in the Route Management Pending screen.



The Route Management Pending screen includes additional changes that will be released with version 72. More information can be found here: [Service Schedule Groupings](#)

Pending

Current

Re-Number

HOUSTON

HOUSTON OPEN MARKET, LOS AI

Commercial, Roll Off

Monday, Tuesday, Wedi

LOAD

51 records

Search

LOCATION	ADDRESS	QTY	SERVICE CODE	FREQUENCY	START DATE	ROUTE	SEQUENCE	WEEK OF MONTH
					Mon 10/03/22	HOU 204	0	Posted
					Tue 10/04/22	HOU 204	0	Posted
					Wed 10/05/22	HOU 204	0	Posted
					Thu 10/06/22	HOU 204	0	Posted
					Fri 10/07/22	HOU 204	0	Posted
					Sat 10/01/22	HOU 204	0	Posted
					Thu 11/02/23		12	
					Thu 11/09/23	HOU 204	2	Posted
48461001	2650 Pearland Pkw... Pearland, TX 77581...	2	8 Yard Tras... 8 Yard FL MSW	5x per week T,W,H,F				
					Mon 11/21/22	HOU 204	0	Posted
					Tue 11/22/22	HOU 204	0	Posted
					Wed 11/23/22	HOU 204	0	Posted
					Thu 11/24/22	HOU 204	0	Posted
					Fri 11/18/22	HOU 204	0	Posted
					Thu 11/02/23		24	
					Thu 11/09/23	HOU 204	12	Posted
48954002	3333 University Av...	1	15 Yard Ob...	1x per week				POST

MAP TYPE

Route Day of Week

DAY OF WEEK

Tue, Wed, Thu, Fri

DISPLAY ALL LINES OF BUSINESS

Satellite

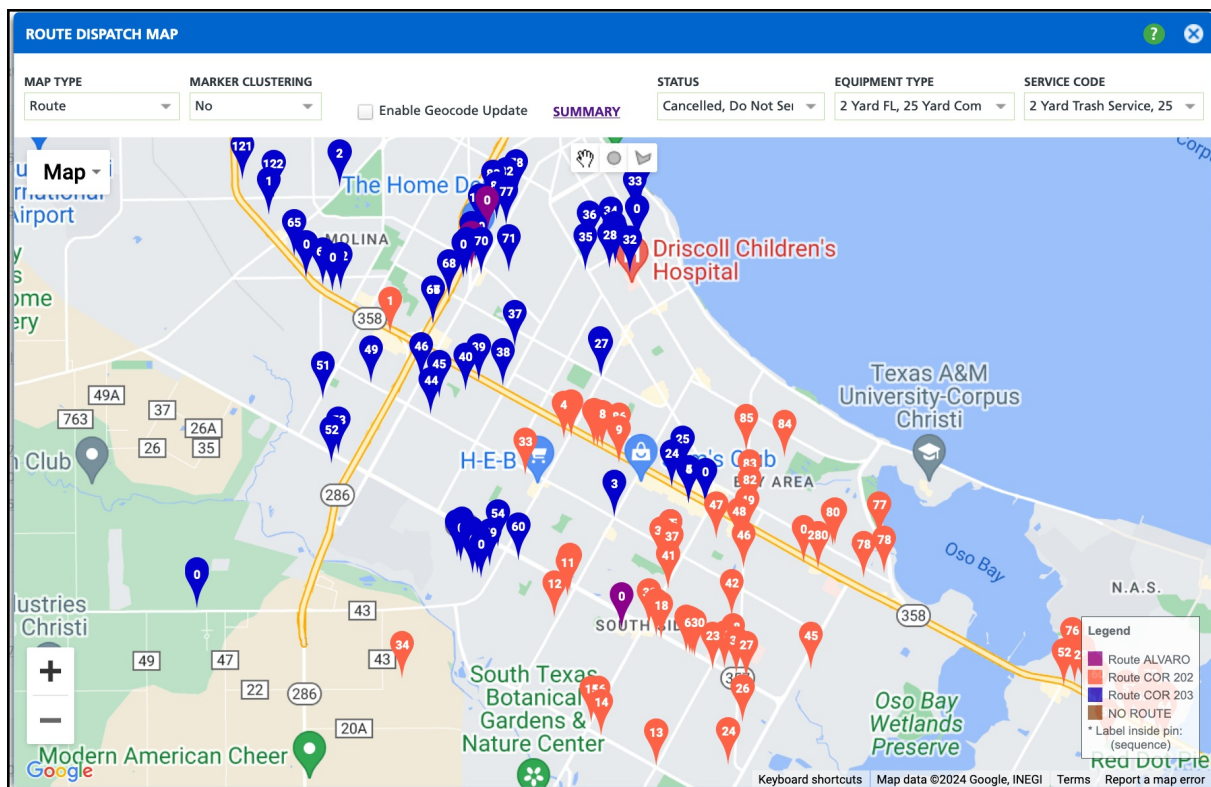
Legend

- Route HOU 204 - Wed 96
- Route HOU 204 - Fri 102
- Route HOU 204 - Thu 87
- Route HOU 204 - Tue 100
- Route HOU 205R - Thu 17
- Route HOU 203 - Thu 84
- Route HOU 203 - Wed 95
- Route HOU 203 - Tue 95
- Route HOU 203 - Fri 97
- Route HOU 202 - Thu 6
- Route HOU 202 - Tue 1
- Route HOU 202 - Wed 5
- Route HOU 201 - Wed 3
- Route HOU 201 - Fri 1
- Not Routed - Thu 6
- Not Routed - Tue 4
- Not Routed - Wed 1

Pathway: Operations > Route Management > Pending (tab)

## Dispatch - Improvement to Display of Map Pins (16487)

The colors of pins on maps have been enhanced to provide better contrast.



Pathway: Operations > Dispatch

## Disposal Records - Add/Edit Allow Up To 4 Decimals in the Gross/Tare Fields (16480)

An enhancement has been made the the Weight In and Weight Out fields to allow up to 4 decimals for the UOM.

Pathway: Operations > Dispatch

## Disposal Activity (Operations) - Rename Screen and Tabs & Duplicated Records Fix (16363, 16683)

The Disposal Location Usage Screen in Operations has been renamed to 'Disposal Activity' and the Usage History tab was changed to 'Activity.' In addition, a fix has been applied to prevent the duplication of disposal locations in Disposal Activity Details.

DISPOSAL ACTIVITY												
Activity		Targets										
DIVISION				SUMMARY BY		GROUP BY		FROM		TO		
CORPUS, DAYTON, HILLSBORO, HOUSTON, QAWASTE				Daily		Disposal Location		04/01/2024		04/19/2024		
DISPOSAL LOCATION	4/1/2024	4/2/2024	4/3/2024	4/4/2024	4/5/2024	4/6/2024	4/7/2024	4/8/2024	4/9/2024	4/10/2024	4/11/2024	4/12/2024
CEFE LF												
CITY OF KINGSVILLE LF												
HOMEBASE												
LONE STAR TS	1 load 276.207 tons \$ 13,810.35											
NAVU_HOU_MRF	4 loads 21.219 tons \$ 0.00											
Total	5 loads 297.426 tons \$ 13,810.35											

DISPOSAL ACTIVITY - NAVU_HOU_MRF - 4/1/24 - 4/1/24												
MATERIAL TYPE	All	CLEARED	All	Search								
START DATE/TIME	END DATE/TIME	ROUTE	WO #	VEHICLE INFO	TANK	TICKET #	QUANTITY	MATERIAL	TOTAL C...	CLEARED		
04/01/2024 7:59 am			7657120				7,540.00 tons	Cardboard		<input type="checkbox"/>		
04/01/2024 7:54 am			7657119				9,567.00 tons	Cardboard		<input type="checkbox"/>		
04/01/2024 6:49 am			7657117				8,330.00 tons	Cardboard		<input type="checkbox"/>		
04/01/2024 6:13 am		HOU 201		2003			8,5005 tons	MSW		<input type="checkbox"/>		
TOTAL:				4		0.00 yd <sup>3</sup>	21.21 tons		\$ 0.00			

Pathway: Operations > Disposal Activity

## Accounting

### Unapplied Management - Unapplied Total Incorrectly Calculated Unapplied Amounts

An issue has been resolved that caused the Unapplied Total from correctly calculating the selected unapplied amounts (Payment, Deposit and Adjustments).

UNAPPLIED MANAGEMENT

ACCOUNTING > UNAPPLIED MANAGEMENT

DIVISION

All

ACCOUNT CLASS

All

BILL GROUP

All

AUDITOR

All

Search

Search

🔍

🗕

🔄

☒ Payment

\$ -227,691.97

☒ Deposit

\$ -668.99

☒ Adjustments

\$ -1,176.26

Total Count: 1,141

Unapplied: \$ -229,537.22

DATE	TYPE	ACCOUNT	AM...	APPL...	UNA...	AGING							TOTAL
						DEPOSIT	CURRENT	1-30	31-60	61-90	91-120	OVER 120	
02/08/2023	Adjus...	BERAN...	41.36	0.00	41.36	0.00	41.36	0.00	0.00	0.00	0.00	-41.36	0.00
09/23/2022	Paym...	REBECC...	-11...	109...	-0.20	0.00	-0.20	0.00	0.00	0.00	0.00	0.00	-0.20
11/07/2022	Paym...	SMITH P...	-10...	10.00	-90.00	0.00	-90.00	0.00	0.00	0.00	0.00	0.00	-90.00
08/12/2022	Paym...	SMITH J...	-45...	0.00	-45.70	0.00	-45.70	0.00	0.00	0.00	0.00	0.00	-45.70
10/06/2022	Paym...	SHANKS...	-12...	119...	-0.20	0.00	-0.20	0.00	0.00	0.00	0.00	0.00	-0.20
01/31/2022	Paym...	JANA & ...	-12...	69.97	-51.66	0.00	-51.66	0.00	0.00	0.00	0.00	0.00	-51.66
08/11/2021	Paym...	BELL GA...	-10...	71.38	-32.17	0.00	-32.17	0.00	0.00	0.00	0.00	0.00	-32.17

Pathway: Accounting > Unapplied Management

### \*New\* Surcharge Management Screen and Updated Site Surcharge Window in Customer Service Screen (16223)

#### Site Surcharge

Pathway: Accounts > (Site section) > Select Surcharge Group (Note - a surcharge group must be assigned to display)

The following changes have been applied to the Site Surcharge Rates window:

- The Type column has been relocated to display before the Franchise Fee and Rate columns.
- If the rate is a percentage:
  - A red asterisk has been added to display with the rate when the rate is overridden at the account or site level.

3. An action button has been added that will open the Site Surcharge Rates.

SITE SURCHARGE RATES			
SURCHARGE	TYPE	FRANCHISE FEE	RATE / INDEX
Fuel Surcharge-Commercial	Percentage %	No	10% *

### Pathway: Accounting > Surcharge Management

users can compare the base rate (the surcharge rate applied to the division) with the current rate (the surcharge override applied at the account or site level) and can also apply a new surcharge rate override.

- 452 - Surcharge Rate Management

Downloaded from <http://ajph.org/> on November 10, 2015

SURCHARGE MANAGEMENT

ACCOUNTING > SURCHARGE MANAGEMENT

DIVISION

QAWASTE

SERVICE REGION

QA Service Region 2, QA Was

SURCHARGE GROUP

All

SURCHARGE

All

LOAD

Search

☒ Has Active Services

☒ Surcharge Rate Overridden

ACCOUNT	SITE	SITE STATUS	SALES REP	SURCHARGE GROUP	SURCHARGE	TYPE	BASE RATE	CURRENT RATE	EFFECTIVE DATE	ESTIMATED REVENUE				
										RECURRING	BASE RATE	CURRENT RATE	VARIANCE	
TOTALS										8	\$ 825.00	\$ 59.00	\$ 52.05	(\$6.95)
Al's RESTAUR... 43199	Al's Restaurant 43199002	Active	Aliena Somers	Pearland Franchise Fee	Pearland Franchise Fee	Percentage %		9%	12/24/2023	\$ 185.00	\$ 0.00	\$ 16.65	\$ 16.65	
Bubble Tea (T... 49031	Cafe 5 49031004	Active	House Account	MULTIPLE FEES	Fuel Surcharge 10%	Percentage %	10%	4%	12/31/2023	\$ 120.00	\$ 12.00	\$ 4.80	\$ (7.20)	
Encanto Resta... 49033	Encanto Resta... 49033001	Active	Aliena Somers	MULTIPLE FEES	Fuel Surcharge 10%	Percentage %	10%	8%	12/31/2023	\$ 100.00	\$ 10.00	\$ 8.00	\$ (2.00)	
Encanto Resta... 49033	Encanto Resta... 49033001	Active	Aliena Somers	MULTIPLE FEES	Environmental Surcharge	Percentage %	5%	3%	12/31/2023	\$ 100.00	\$ 5.00	\$ 3.00	\$ (2.00)	
Jack in the Box 48977	Jack in the Box 48977001	Active	House Account	Fuel Surcharge 10%	Fuel Surcharge 10%	Percentage %	10%	5%	12/31/2023		\$ 0.00	\$ 0.00	\$ 0.00	
Bubble Tea (T... 49031	Bubble Tea (T... 49031001	Active	House Account	MULTIPLE FEES	Fuel Surcharge 10%	Percentage %	10%	3%	12/31/2023	\$ 120.00	\$ 12.00	\$ 3.60	\$ (8.40)	
Holiday Cafe... 49032	Holiday Cafe... 49032001	Active	House Account	MULTIPLE FEES	Fuel Surcharge 10%	Percentage %	10%	8%	12/31/2023	\$ 100.00	\$ 10.00	\$ 8.00	\$ (2.00)	
Cascade Nutri... 49029	Cascade Nutri... 49029001	Active	House Account	MULTIPLE FEES	Fuel Surcharge 10%	Percentage %	10%	8%	01/24/2024	\$ 100.00	\$ 10.00	\$ 8.00	\$ (2.00)	

## AR Aging Management - 'Total' Calculation Not Rounding Correctly (16379)

The rounding logic in the Total column of the AR Aging Management screen has been corrected to align with the AR Aging Buckets displayed in the Customer Service screen.

The screenshot displays the AR Aging Management interface for account 49046, Subway Fountain Valley. The account details include address, terms, and invoice delivery status. The aging buckets table shows the following values:

	CURRENT	1-30	31-60	61-90	91-120	120+	TOTAL
	54.79	100.99	62.99	34.99	26.49	47.69	327.94

A red arrow points to the 'TOTAL' value of 327.94. Below the aging buckets, a table shows the account details for the selected record:

ACT ID	ACCOUNT NAME	STATUS	AVG DAYS TO PAY	LAST PAYMENT	LAST COLLECTIONS ACTIVITY	CURRENT	1-30	31-60	61-90	91-120	OVER 120	TOTAL	ACCOUNT MANAGER	AUDITOR	BILL GROUP
49046	Subway Fountain Valley	Active	0			54.79	100.99	62.99	34.99	26.49	47.69	327.94	Paul	(Inactive)	QA Billing Cycle

## AR Payment Batch (Accounting) - Logic Update to Bank Account Selection (16261)

The Bank Account drop down option in Create AR Payment Batch has been revised to restrict accounts to those linked to divisions accessible by the user.

The screenshot displays the AR Payment Batch interface. The 'CREATE PAYMENT BATCH' dialog box is open, showing the following fields:

- DIVISION:** Select Division (highlighted with a red box)
- DATE:** [Date field]
- PERIOD:** [Period field]
- BANK ACCOUNT:** Select Bank Account
- NOTE:** [Text area]

A 'SAVE' button is located at the bottom of the dialog box.

Pathway: Accounting > AR Payment Batch

## Billing Analysis (Billing) - Reports Not Exporting to Excel (15690)

The issue preventing the generation of any Billing Analysis reports in Excel has been resolved.

BILLING ANALYSIS WINDOW									
TYPE	Bill Batch Summary			Search					
	SITE NAME	ACCOUNT ID	ACCOUNT NAME	INVOICE ID	PO NUMBER	WORK ORDER NUMBER	DATE	DESCRIPTION	QTY
33922001	TERRY Smith	33922	TERRY Smith	806456			11-03-22 - 11-30-22	2 Yard Trash Service	1.0000
33922001	TERRY Smith	33922	TERRY Smith	806456			11-04-22 - 11-30-22	2 Yard Trash Service	1.0000
46593002	Staple, LLC	46593	Staple, LLC	806458		4975653	2022-10-24	Roll Off Haul	1.0000
46593002	Staple, LLC	46593	Staple, LLC	806458		4975653	2022-10-24	Roll Off Disposal Per Ton	5.0200

Pathway: Accounting > Billing > (right-click) on a batch > Billing Analysis

## Credit Card Expiration - Expiration Filter Added (16290)

The following enhancements have been applied to the Credit Card Expiration screen:

- A new 'Expiration' filter has been added. Filter options include: *Expired, In 1 Month, In 3 Months and In 6 Months.*
- Export to Excel added.
- Addition of bread-crum pathway.
- Refresh button added.

CREDIT CARD EXPIRATION							
DIVISION	BILL GROUP	AUTO PAY	HAS ACTIVE SERVICES	EXPIRATION	ACCOUNTING > CREDIT CARD EXPIRATION		
All	All	All	All	In 6 months	Search		
EXPIRATION DATE	AUTO PAY	LAST FOUR	TYPE	LAST TRANSACTION	ACCOUNT	ACCOUNT STATUS	HAS ACTIVE SERVICES
07/31/2024	At Billing	1111	Visa		48982 Panda Express	Active	Yes
05/31/2024	At Billing	1111	Visa		48983 Mendocino Farms	Active	No
02/29/2024	At Billing	1111	Visa		49012 Dollar Tree	Active	Yes
05/31/2024	At Billing	3065	Visa	Approved \$0.00 on 02/19/2024	31875 Jones DANIEL	Active	Yes
02/29/2024	At Billing	1562	Visa	Approved \$0.00 on 02/19/2024	31879 SmithKEVIN / MERCY	Active	Yes
02/29/2024	At Billing	5189	Mastercard	Approved \$46.69 on 10/31/2022	31910 Johnson , MARIA L	Active	Yes
07/31/2024	At Billing	0462	Mastercard	Approved \$0.00 on 02/19/2024	31919 McAllister DEBORAH	Active	Yes
02/29/2024	At Billing	0907	Visa	Approved \$0.00 on 02/19/2024	31955 Jonas RALPH	Active	Yes
03/31/2024	At Billing	0773	Mastercard	Approved \$0.00 on 02/19/2024	32273 Ericson JOSEPH	Active	Yes

Pathway: Accounting > Credit Card Expiration

## AR Payment Batch - Update to 'Bank Cleared Date' Field (16400)

The "Bank Cleared Date" field has been updated to enable deletion of the date using the keyboard's delete button.

AR PAYMENT BATCH								
PERIOD		DIVISION	BANK ACCOUNT		Open 1 \$ 0.00		Voided 0 \$ 0.00	
Feb 2024		HOUSTON	All					
BATCH #	DIVISION	TYPE	IS MERCHANT	STATUS	DATE	BANK CLEARED DATE	BANK ACCOUNT	
11235 Note Testing NAVU-16400	HOUSTON	Payment		Open	2/27/24		TBD	
11209	HOUSTON	Payment	Pineapple Scheduled Auto Pay	Posted	2/5/24	02/02/2024	COMERICA - FWS	
11215	HOUSTON	Payment	Pineapple Scheduled Auto Pay	Posted	2/10/24		COMERICA - FWS	
11219 Note Testing NAVU-16368	HOUSTON	Payment		Posted	2/15/24		TBD	
11222	HOUSTON	Payment	Pineapple eCheck Scheduled ...	Posted	2/15/24		COMERICA - FWS	
11228	HOUSTON	Payment	Pineapple eCheck Scheduled ...	Posted	2/20/24		COMERICA - FWS	
11230	HOUSTON	Payment	None	Posted	2/22/24		COMERICA - FWS	
11232	HOUSTON	Payment	Pineapple Applied Payment	Posted	2/23/24		COMERICA - FWS	

Pathway: Accounting > AR Payment Batch

## AR Payment Batch - Enhancements to Batch Details Screen (16493, 16490)

The following changes have been applied to the Batch Details screen (in AR Payment Batch, select a batch to view its details):

1. Sorting has been enhanced to include: Balance, Status, Entry Order and Account #.
2. Notes that are added to the payment record will now export to Excel. Additionally, when a batch is exported to Excel, the Batch # and Note fields are separated.
3. When importing a batch, the batch Amount and Count totals will auto-refresh.

**BATCH - 11242 DIVISION - HOUSTON**

DATE: 03/05/2024 BANK ACCOUNT: COMERICA - FWS AMOUNT: \$ 4,308.65 COUNT: 2 STATUS: Posted

NOTE: This note was added to the payment record CREATED BY: Navusoft System (Inactive) - 03/05/2024 1:06 pm POSTED BY: Aliena Somers - 03/14/2024 8:01 am

Search for Account/ Site Double click on search result to add payment DEFAULT PAYMENT TYPE

ACCOUNT ID	STATUS	BALANCE	ACCOUNT NAME	SITE ID	SITE NAME	PREVIOUS ID
45398	Active	\$ 12,181.26	Credit Card	82227558_9999	100.00	0.00
43200	Active		Credit Card	123456_DEM...	4,208.65	0.00

UN-POST PRINT REPORT VOID IMPORT

Pathway: Accounting > AR Payment Batch > Open Batch Details

## Billing - Site Name Added to Location Column in Pre Billing Report (16518)

In the Pre-Billing Analysis screen, the site name has been added to the location column.

PRE-BILLING ANALYSIS										
Work Orders		Service Changes		Manual Charges		Pending Approval Adjustments				
FILTER		WO Completed - Not Posted		COUNT	4586	REVENUE	316,773.26	Search		
ROUTE	LOCATION	SCHEDULED DATE	WO#	SERVICE TYPE	QTY	EQUIPMENT	REVENUE	COST	POSTING STATUS	PHOTOS
HOU 302	43734001 Example Account 1 4300 RICE DRIER RD, PE...	Fri 4/22/22	* 4019965	RO_DUMPRET	1	40 Yard R...	351.75	51.73	Ready to post	
HOU 201	43383001 Example Account 2 15818 HWY 288, PEARL...	Mon 5/23/22	4129472	FL_SERVICE	2	8 Yard FL	75	0	Pending	
HOU 201	43383001 Example Account 2 15818 HWY 288, PEARL...	Tue 5/24/22	4129479	FL_SERVICE	2	8 Yard FL	75	0	Pending	
HOU 201	43383001 Example Account 2 15818 HWY 288, PEARL...	Wed 5/25/22	4129261	FL_SERVICE	2	8 Yard FL	75	0	Pending	
HOU 201	43383001 Example Account 2 15818 HWY 288, PEARL...	Thu 5/26/22	4129486	FL_SERVICE	2	8 Yard FL	75	0	Pending	
HOU 202	43855001 Example Account 3 9002 BROADWAY, PEAR...	Thu 5/26/22	4141125	FL_SERVICE	1	4 Yard FL	55	0	Pending	
HOU 203	46841001 Example Account 4 3525 S Main St, Pearland	Thu 5/26/22	4141349	FL_SERVICE	1	6 Yard FL	60	0	Pending	

Pathway: Accounting > Billing > Pre-Billing (right click on a batch)

## Credit Card Expiration - Logic Updated (16415)

The logic for Credit Card Expiration notifications has been updated to issue notifications in scenarios where a customer was previously on auto-pay with their expired card, but the new active card **is not set to auto-pay**. Previously, credit card expiration notifications **were not issued** in situations where a customer was on auto-pay with their expired card, but the new card wasn't set to auto-pay.

NOTIFICATION TEMPLATE SETUP										SETUP > SYSTEM > NOTIFICATION TEMPLATE
+ TYPE		Credit Card Expiration								
ID	NAME	DEFAULT SUBJECT	TYPE	CONTENT TYPE	CREATED BY	SURVEY TYPE	RESPONSE REQUEST	ACTIVE	PREVIEW EMAIL	PREVIEW TEXT
75	Credit Card Expiration N...	Credit Card Expiration N...	Credit Card Expir...	text/html	Lori Jones			Yes	<a href="#">Preview</a>	<a href="#">Preview</a>
107	Credit card second	Credit Card second	Credit Card Expir...	text/html	Lori Jones			No	<a href="#">Preview</a>	

Pathway: Setup > System > Notification Template > Credit Card Expiration (Type)

## AR Payment Batch (Accounting) - Search Updates Including Addition of Shortcut Key (16523)

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

### Search and Add Accounts/Sites

To search and add accounts and sites to the batch, an 'Add' icon has been introduced. Additionally, the search can also be initiated by selecting the F5 key on your keyboard.

**BATCH - 11264 DIVISION - QAWASTE**

DATE: 04/01/2024 BANK ACCOUNT: NAVU WELLS STATUS: Posted

NOTE: This is a note CREATED BY: Aliena Somers - 04/01/2024 2:10 pm POSTED BY: David Navarro - 04/03/2024 1:43 pm

**+** SORT Entry Order ↓ DEFAULT PAYMENT TYPE COUNT 1 Search for Payment in Batch

ACCOUNT ID	NAME
45447	Trinity Site Service

**SEARCH ACCOUNTS / SITES**

Search for Account/ Site 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 \$ 555.00

## Change Account

In the event of an error where the wrong account was linked to the payment, the process to change the account has been updated. To do so, either tab to the Account ID field and use the Space Bar to open the Search Accounts / Sites screen, or simply select within the Account ID field to initiate the search.

**BATCH - 11270 DIVISION - QAWASTE**

DATE: 04/08/2024 BANK ACCOUNT: NAVU WELLS STATUS: Open

NOTE: CREATED BY: Paul Gonzalez - 04/08/2024 10:46 am POSTED BY: Paul Gonzalez - 04/08/2024 1:26 pm

**+** SORT Entry Order ↓ DEFAULT PAYMENT TYPE COUNT 2 Search for Payment in Batch

ACCOUNT ID	NAME	STATUS	BALANCE	TYPE	REFERENCE	AMOUNT	APPLIED DEPOSIT AUTO APPLY AMOUNT
27443	Jones MATTHEW	Active	\$ 249.00	Check	0303	200.00	0.00
27955	MATTHEW						

**SEARCH ACCOUNTS / SITES**

Search for Account/ Site Double click on search result to Change Account

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

Pathway: Accounting > AR Payment Batch

## GL Transaction Processing - Logic and Functionality Updated to Record ID in GL Setup Errors Screen (16561)

In the GL Setup Errors screen (within GL Transaction Processing), the Record ID field has been enhanced to display as a clickable link. Clicking on this link will take the user to the screen where the error was found and can be fixed.

## Billing (Accounting) - Logic Updated to Email Notifications (16645, 16659)

An issue has been resolved in Billing Batch that prevented email notifications from being sent to Billing Contact 2 on an account. Performance has also been enhanced when opening the Notification Summary screen for batches containing a high volume of invoice notifications.



Pathway: Accounting > Billing

## Billing (Accounting) - Blocklisted Email Address Logic Added (16663)

Email invoicing in Billing has been updated to ignore/skip blocklisted email addresses.

Pending and In Process History					
+ DIVISION All					
BILL GROUP	DIVISION	BATCH ID	TYPE	STATUS	
DAY-RESI MONTHLY ADVANCE	DAYTON	25637	Scheduled	Not Started	
COR-Q1-JAN-APR-JUL-OCT	CORPUS	25537	Scheduled	Posted	
DAY-Q2-FEB-MAY-AUG-NOV		25816	Scheduled	Not Started	
HOU-COMMERCIAL ARREARS		25689	Scheduled	Processed	
DAY-ROLF LIBERTY		25766	Scheduled	Processed	
Annual Billing		25841	Scheduled	Processed	
DAY-ROLF BI-WEEKLY		25814		Not Started	
DAY-COMM MONTHLY ARREARS		25683	Scheduled	Not Started	
DAY-Q3-MAR-JUN-SEP-DEC		25817		Not Started	
DAY-ROLF BI-WEEKLY		25667	Scheduled	Processed	
COR-ROLF MONTHLY		25675	Scheduled	Not Started	
DAY-ROLF LIBERTY		25810	Off Scheduled	Not Started	
DAY-Q3-MAR-JUN-SEP-DEC		25811	Scheduled	Not Started	
QA Billing Cycle	QAWASTE	25844	Scheduled	Processed	

Pathway: Accounting > Billing

## Reports

## AR Analysis Report - Details Screen Not Loading Large Data Sets (16161)

An issue has been resolved that was preventing the AR Analysis Details screen from loading large sets of data.

AR ANALYSIS

REPORTS > ANALYSIS > AR ANALYSIS

TYPE

AR Analysis

YEAR

2023

DIVISION

All

LOAD

Search

	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	TOTAL
Beginning balance	1,583,079.26	1,727,649.54	2,003,235.23	2,227,237.13	2,224,252.89	2,212,954.92	2,195,410.68	2,197,206.78	2,241,117.58	5,364,320.95	5,363,630.08	5,364,535.38	
Manual Charges	11,397.95	6,521.54	688.30	199.11	366.34	80.30	137.25	39.21	1,574,128.90	227.78	162.70	67,936.21	1,661,885.59
Work order charges	10,548.94	20,466.31	5,325.75	795.25	1,007.70	3,335.95	1,671.55	116.15	6,088.97	1,565.85	788.50	974.15	52,685.07
Recurring services	105,366.06	201,820.09	177,065.14	784.61	653.94	1,681.30	625.29	36,378.94	1,000,739.29	1,159.90	1,413.69	725.82	1,528,404.07
Surcharges	8,263.17	1,877.89	25,902.38	136.58	109.27	467.47	136.21	8.26	43,444.52	100.17	36.12	0.00	80,482.04
Surcharges- Non Revenue	10,650.55	29,561.70	5,619.92										
Taxes	7,620.70	18,037.07	12,847.42										
Payments	-8,392.09	-993.20	-3,933.00										
Adjustments	-885.00	-1,705.71	-102.00										
Payment reversals	0.00	0.00	321.00										
Total	1,727,649.54	2,003,235.23	2,226,959.94										

AR ANALYSIS DETAILS - RECURRING SERVICES - MAR

Search

DIVISION	ACCOUNT ID	ACCOUNT NAME	SITE ID	SITE NAME	TYPE	INVOICE #	DATE	AMOUNT	CODE
CORPUS	31834	EXAMPLE NAME	31834001	EXAMPLE NAME	Recurring service	870864	2023-03-01	37.00	Monthly Trash Svc
CORPUS	31834	EXAMPLE NAME	31834001	EXAMPLE NAME	Recurring service	870864	2023-03-01	37.00	Monthly Trash Svc
CORPUS	31835	EXAMPLE NAME	31835001	EXAMPLE NAME	Recurring service	870865	2023-03-01	37.00	Monthly Trash Svc
CORPUS	31835	EXAMPLE NAME	31835001	EXAMPLE NAME	Recurring service	870865	2023-03-01	37.00	Monthly Trash Svc
CORPUS	31836	EXAMPLE NAME	31836001	EXAMPLE NAME	Recurring service	870866	2023-03-01	33.00	Monthly Trash Svc
CORPUS	31836	EXAMPLE NAME	31836001	EXAMPLE NAME	Recurring service	870866	2023-03-01	33.00	Monthly Trash Svc
CORPUS	31836	EXAMPLE NAME	31836001	EXAMPLE NAME	Recurring service	870866	2023-03-01	15.00	96 Gallon Extra Ca
CORPUS	31836	EXAMPLE NAME	31836001	EXAMPLE NAME	Recurring service	870866	2023-03-01	15.00	96 Gallon Extra Ca
CORPUS	31837	EXAMPLE NAME	31837001	EXAMPLE NAME	Recurring service	870867	2023-03-01	37.00	Monthly Trash Svc
CORPUS	31837	EXAMPLE NAME	31837001	EXAMPLE NAME	Recurring service	870867	2023-03-01	37.00	Monthly Trash Svc
CORPUS	31839	EXAMPLE NAME	31839001	EXAMPLE NAME	Recurring service	870868	2023-03-01	33.00	Monthly Trash Svc
CORPUS	31839	EXAMPLE NAME	31839001	EXAMPLE NAME	Recurring service	870868	2023-03-01	33.00	Monthly Trash Svc
CORPUS	31840	EXAMPLE NAME	31840001	EXAMPLE NAME	Recurring service	870869	2023-03-01	37.00	Monthly Trash Svc

Pathway: Reports > Analysis > AR Analysis

## Service History Report - 'Gross Qty' and 'No Charge Qty' Columns Added (16181)

An enhancement has been made to the Service History report to include a column for the Gross Quantity and the No Charge Quantity totals.

Service History

Account ID: 49020, Start Date: 12/01/2023, End Date: 01/31/2024

SCHDULED DATE

WO #

TYPE

WORKFLOW

WO CHARGES

GROSS QTY

NO CHARGE QTY

QTY

RATE

AMOUNT

Account Id 49020 Friendly Inn

49020001

2146 San Gabriel Blvd

Rosemead, CA91770-3642

12/22/23

7140640

On Call

RO\_SWAP

ROHAUL

1.00

0.00

1.00

0.00

0.00

12/22/23

7140640

On Call

RO\_SWAP

ROLFTONS

3.50

1.20

2.30

35.00

80.50

Total

4.50

1.20

3.30

\$ 35.00

\$ 80.50

Grand Total

4.50

1.20

3.30

\$ 35.00

\$ 80.50

Pathway: Reports > Standard Reports > Account > Service History

## Tax Summary (AR Reports) - Update to Division Filter (16579)

The Division filter in the Tax Summary report has been enhanced to support multiple selections.

TAX SUMMARY

PARAMETER

VALUE

Period From \*

Mar 2024

Division

Period To \*

All

Tax

Example

-- DAYTON

-- QAWASTE

CORPUS

HILLSBORO

HOUSTON

RUN REPORT

RUN AS EXCEL

Pathway: Reports > Standard Reports > AR > Tax Summary

Sales Results Net New - Sales Result Details Screen Fixed to Match Totals Listed (16584)

Previously, an error occurred with the records in Sales Results Details not matching the total listed on the Sales Results Net New screen. This issue has been resolved.

SALES RESULTS NET NEW

REPORTS > ANALYSIS > SALES RESULTS NET NEW

RANGE

PERIOD

BASED ON

DIVISION

LINE OF BUSINESS

Period

Apr 2024

Effective Date

All

All

GROUP BY

Sales Rep

NEW

INCREASES

GROSS TOTAL

CONTROLLABLE

NON-CONTROLLABLE

DECREASES

NET TOTAL

TEMP / SEASONAL

1085

\$ 90.00

\$ 0.00

\$ 90.00

\$ (90.00)

\$ 0.00

\$ 0.00

\$ 0.00

0%

1 (1 Sites)

0 (0 Sites)

1

0

0 (0 Sites)

0 (0 Sites)

David Norman

\$ 0.00

\$ 0.00

\$ 0.00

\$ 0.00

\$ 0.00

\$ 0.00

\$ 0.00

N/A

1 (1 Sites)

0 (0 Sites)

0

0

0 (0 Sites)

0 (0 Sites)

Aliena Santos

\$ 0.00

\$ 0.00

\$ 0.00

\$ 0.00

\$ 0.00

\$ 0.00

\$ 0.00

N/A

0 (0 Sites)

0 (0 Sites)

0

0

0 (0 Sites)

1 (1 Sites)

Dave Peters

\$ 50.00

\$ 0.00

\$ 50.00

\$ 0.00

\$ (450.00)

\$ 0.00

\$ (400.00)

0%

1 (1 Sites)

0 (0 Sites)

0

1

0 (0 Sites)

0 (0 Sites)

House Account

\$ 0.00

\$ 37.61

\$ 37.61

\$ 0.00

\$ 0.00

\$ 0.00

\$ 37.61

7.7014%

2 (1 Sites)

8 (3 Sites)

0

0

0 (0 Sites)

0 (0 Sites)

House Acct non System

\$ 0.00

\$ 85.00

\$ 85.00

\$ 0.00

\$ 0.00

\$ 0.00

\$ 85.00

N/A

1 (1 Sites)

Sierra Green

\$ 0.00

0 (0 Sites)

Natalia Paul

\$ 0.00

0 (0 Sites)

Megan Nancy

\$ 0.00

0 (0 Sites)

Matt Lex gmail Eckstrom

\$ 0.00

0 (0 Sites)

Total

\$ 140.00

6

SALES RESULT DETAILS

House Account - New

SHOW MAP

Search

DIVISION

LINE OF BUSINESS

SOURCE

REASON CODE

RATE UPDATE BATCH

SERVICE REGION

ACCOUNT CLASS

EQUIPMENT TYPE

SITE ID

SITE

START DATE

POSTED DATE

RATE CHANGE

1085

QAWASTE

Commercial

Referral

ADD-New Business

QA Waste OPEN MARKET

COMMERCIAL

4 Yard FL

48983001

Mendocino Farms

04/02/24

04/03/24

\$ 0.00

N/A

QAWASTE

Commercial

Referral

ADD-New Business

QA Waste OPEN MARKET

COMMERCIAL

48983001

Mendocino Farms

04/02/24

04/03/24

\$ 0.00

N/A

Pathway: Reports > Analysis > Sales Results Net New

Setup

Work Type Event Class Setup - Inactivate Option Added (16215)

The Work Type Event Class screen now features an Active field with 'Yes' and 'No' options for each work type event class. If a work type event class has '0' linked service codes, it can be marked as inactive. In cases where a service code is linked, a hyperlink to the service code screen has been included, enabling the update of the Work Type Event Class field for that service code.

**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	Landfill	0
1006	Medical Waste	Medical Waste	2
1007	Transfer	Medical Waste	1
1008	Scale Inbound	Scale	1
1009	Document Destruction	Document Destruction	2
1010	Hazardous Waste Serv	Hazardous Material	1

**UPDATE WORK TYPE EVENT CLASS**

NAME: Landfill  
LOB: Landfill  
ACTIVE: No

**SERVICE CODES - WORKTYPE EVENT CLASS (RESIDENTIAL - HAND THROW)**

ID	NAME	PRICING MODEL	CALCULATE RATE PER YARD	WORK TYPE EVENT CLASS	ACTIVE
RSHAND	Hand Throw	None	No	Residential - H...	Yes
COHAND	Hand Throw - Comm	None	No	Residential - H...	Yes

Pathway: Setup > Operations > Work Type Event Class

## Tax Region Setup - 'Type' Column Added to Tax Rate Tab (16217)

In the Tax Rate tab of the Tax Region Setup screen, a new 'Type' column has been added.

**TAX REGION SETUP** SETUP > ACCOUNTING > TAX REGION

TAX REGION ID	NAME	MAP AREA	ERP LABEL	ACTIVE
1000	AUSTIN CITY-MTA-ETGW		12345	Yes
1001	BLANCO ESD 1 BSLD		12345	Yes
1002	BLANCO CO ESD 2 BSLD			Yes
1003	COMAL CO ESD 7			Yes
1004	CALDWELL COUNTY			Yes
1005	CALDWELL CO ESD 1-A			Yes
1006	CALDWELL CO ESD 2			Yes
1007	CALDWELL-HAYS ESD 1A			Yes
1008	COMAL CO ESD 6			Yes
1009	AUS-COMAL ESD 3 CLLD			Yes
1010	COMAL CO ESD 4 CLLD			Yes
1011	DRIPPING SPRNGS CITY			Yes
1012	FAYETTE COUNTY			Yes
1013	GONZALES COUNTY			Yes

**Tax Rate**

TAX RATE ID	TAX REGION	TAX	LEVEL	TYPE	ERP LABEL	RATE	START DATE
1778	COMAL CO ESD 7	TEXAS STATE	Tax	Percentage %		6.25	01/01/23
1779	COMAL CO ESD 7	COMAL COUNTY	Tax	Percentage %		0.5	01/01/23
1780	COMAL CO ESD 7	COMAL CO ESD 7	Tax	Percentage %		1.5	01/01/23

Pathway: Setup > Accounting > Tax Region

## Role Setup - Enhancements to Role Setup and Permissions Grid (16203)

The following enhancements have been applied to Role Setup and its Permissions grid:

- Columns renamed:
  - The 'Authorized' column was renamed to 'Authorized Permissions.'
  - The 'Not Authorized' column was renamed to 'Not Authorized Permissions.'
  - The 'New' column was renamed to 'New Permissions.'
- The Expand and Collapse feature has been incorporated into each module, with the default setting configured to expand all modules. Additionally, 'Expand All' and 'Collapse All' buttons were added to

facilitate mass expansion or collapse of modules.

3. 'Authorized,' 'Not Authorized' and 'New' icons in the Authorization Status column have been replaced with a drop down selection for each permission.
4. Background colors have been added to identify the authorization status of a permission for the role.
  - o New = Clear
  - o Authorized = Green
  - o Not Authorized = Red
5. The Authorization filter has been updated to include an 'All' option in replacement of the "Clear" button. In addition, the 'Module' filter has been removed.

ROLE SETUP

SETUP > SYSTEM > ROLE

ROLE ID	ROLE NAME	EDIT SERVICE PAST DAYS LIMIT	INVOICE ADJUSTMENT LIMIT	ADJUSTMENT APPROVAL LIMIT	MAX DEFAULT RATE DISCOUNT	AUTHORIZED PERMISSIONS	NOT AUTHORIZED PERMISSIONS	NEW PERMISSIONS	ACTIVE USER COUNT	DOCUMENTATION VIEW SCORE	
1	Navusoft Admin and Support	99	\$ 5.00	\$ 1,000,000.00		348	6	2	0		
2	Sales Manager	7	\$ 100.00	\$ 0.00		176	162	18	2	9%	
3	Sales Representative	7	\$ 4.00	\$ 0.00		90	249	17	10	0%	
4	Driver	0	\$ 0.00	\$ 0.00		11	328	17	92	0%	
5	Controller	0	\$ 0.00	\$ 0.00		98	241	17	3	0%	
1000	Operations Mgr	30	\$ 0.00	\$ 0.00		141	199	16	10	2%	
1014	Administrator	90	\$ 200.00	\$ 99,999.00		335	8	13	10	1%	
1015	Customer Service Rep	30	\$ 15.00	\$ 15.00		110	227	19	10	6%	
1016	Dispatcher	30	\$ 10.00	\$ 0.00		158	182	16	8	12%	
1017	Billing Mgr	90	\$ 1,500.00	\$ 500.00		229	110	17	6	1%	
1018	Customer Service Manager	60	\$ 50.00	\$ 0.00		156	184	16	1	6%	
1019	Crew/Labor/Technician	7	\$ 0.00	\$ 0.00		1	345	10	0		
1020	Driver-Assignment	7	\$ 0.00	\$ 0.00		2	344	10	1		
1021	Helper-Assignment	7	\$ 0.00	\$ 0.00		1	345	10	0		
1022	Technician-Assignment	7	\$ 0.00	\$ 0.00		1	346	9	0		

Permissions

Users

AUTHORIZATION

All

EXPAND ALL

COLLAPSE ALL

PERMISSION NAME

PERMISSION ID

AUTHORIZATION STATUS

Accounting

Accounts

Dashboard

Database

Help

Operations

Active Dispatch

Add charge code to work order

Add manual label to work order

Add/Edit account Safety Profile

Adjust Site Inventory

Adjust Tank Inventory

Adjust Yard Inventory

Approve work order label exception

Assignable as a Mechanic

Assignable as a route Driver

389

334

299

408

222

172

220

317

237

305

Authorized

New

Authorized

Not Authorized

Authorized

Not Authorized

Authorized

Not Authorized

Not Authorized

Authorized

Pathway: Setup > System > Role

## Permission Setup - Enhancements to Role Permission Tab (16197)

The following enhancements have been applied to the Role Permission grid in the Permission Setup screen:

- The 'Authorized,' 'Not Authorized' and 'New' icons in the Authorization Status column have been replaced with a drop down selection for each role permission.
- Background colors have been added to identify the authorization status of a role permission.
  - o New = Clear
  - o Authorized = Green
  - o Not Authorized = Red

PERMISSION SETUP						SETUP > SYSTEM > PERMISSION	
MODULE	Search						
PERMISSION ID	NAME	DESCRIPTION	MODULE	DOCUMENTATION TOPICS	DOCUMENTATION VIEW SCORE		
1	Log In To Navusoft Core		System	124	6%		
2	Create Prospect Accounts And Sites		Accounts	4	1%		
3	Edit Prospect Account		Accounts	1	6%		
4	Edit Prospect Site		Accounts	0			
5	View Account		Accounts	115	1%		
6	View Site		Accounts	40	2%		
7	Update Account Status		Accounts	2	3%		
8	Update Site Status		Accounts	1	3%		
9	Create Appointment		Accounts	1	2%		
10	Edit Appointment For Self		Accounts	0			
11	Delete Appointment For Self		Accounts	0			
12	Edit Appointment For Others		Accounts	0			
13	Delete Appointment For Others		Accounts	0			
14	Create Note		Accounts	2	1%		
15	Edit Note For Self		Accounts	1	4%		
16	Delete Note For Self		Accounts	1	0%		
17	Edit Note For Others		Accounts	1	5%		
18	Delete Note For Others		Accounts	1	0%		
19	Set Note Date And Time When Adding Note		Accounts	0			
20	Update Note Date And Time For Self		Accounts	0			
21	Update Note Date And Time For Others		Accounts	0			
22	Setup \ Accounting		Setup	27	0%		
23	Setup \ Account		Setup	24	1%		

Role Permission					
ID	ROLE	ACTIVE USERS	ROLE NAME		AUTHORIZATION STATUS
1008	1	26	Navusoft Admin and Support		Authorized
1182	2	5	Sales Manager		Authorized
11796	3	17	Sales Representative		Authorized
5982	4	99	Driver		Not Authorized
2104	5	7	Controller		Authorized
1586	1000	20	Operations Mgr		Authorized
10213	1014	14	Administrator		Authorized
10635	1015	12	Customer Service Rep		Not Authorized
11026	1016	10	Dispatcher		Authorized

## Service Code and Charge Code Setup - Option to Hide Inactive Items Added (16216)

A 'Hide Inactive' check box has been added at the top of both the Service Code Setup and Charge Code Setup screens. By default, this box is checked upon the initial loading of the screen to hide inactive codes. To display the codes, uncheck the box.

Service Code Setup

+

Line of Business

Commercial

+

Equipment Type

All

+

Material Type

All

+

Hide Inactive

☒

ID	Name	Line of Business	Equipment Type	Material Type	UOM	Is Taxable	Taxable Class	GL
FL10R	10 Yard Recycle Service43	Commercial	10 Yard FL (Ser)	Recycle	month	Yes		Service
FL10T								
FL02R								
FL02T								
FL02NP								
FL02VIPR								
FL02VIPT								
FL02CDSE								
FL02SVCSO								
FL02NWK								
FL02PEOC								
FL03R								
FL03T								
FL03VIPT								
FL04R								

Charge Code Setup

+

Line of Business

Roll Off

+

Equip Type

All

+

Material Type

All

+

Hide Inactive

☒

ID	Name	Line of Business	Equipment Type	Material Type	Rate UOM	Is Taxable	Taxable Class
ADJ-RO	Adjustment-Roll Off	Roll Off			each	Yes	
CCMSWTN	CCMSW FEE	Roll Off			each	Yes	
DISP_CD	Disposal C&D	Roll Off		C&D	ton	No	
DISP_RECY	Disposal Recycle	Roll Off		Recycle	ton	No	
DISP_TRASH	Disposal Trash	Roll Off		MSW	ton	No	
INACTIVITY	Inactivity Fee	Roll Off			yard	No	
ROMUNI	Municipal Roll Off	Roll Off			each	Yes	
ROPKRHAUL2	Packer Haul 34YD OR LARGER	Roll Off			each	Yes	
ROPKRHAUL1	Packer Haul Less Than 34YD	Roll Off			each	Yes	
ROAFH	Roll Off After Hours	Roll Off			each	Yes	
RORENTDAY	Roll Off Daily Rental	Roll Off			each	Yes	
RODEL	Roll Off Delivery	Roll Off			each	Yes	
ROLETONS	Roll Off Disposal Per Ton	Roll Off			ton	Yes	

Pathways: Setup > Services > Service Code; Setup > Services > Charge Code

## Surcharge Group Setup - Screen Enhancements (16228)

The following enhancements have been made to the Surcharge Group Setup screen:

1. An Export button has been added.

2. A Search bar has been added.
3. Logic for adding surcharges has been changed. To add a surcharge, click the **green +** add icon to open the Add Surcharge window. Within Add Surcharge, click the **green +** for each surcharge that should be added to the group.
4. Logic to remove a surcharge has been changed. To remove a surcharge, click the **red -** icon and the surcharge will be removed from the group.

SURCHARGE GROUP SETUP		
<div> <div>1</div> <div>2</div> <div>+</div> <div>Search</div> <div>Q</div> <div>⌵</div> <div>↺</div> </div>		
ID ↑	NAME	ACTIVE
1000	Dayton Franchise Fee	Yes
1001	Liberty Franchise Fee	Yes
1004	CCMSW Commercial	Yes
1010	Pearland Franchise Fee	Yes
1011	CCMSW - Fuel Surcharge - Commercial	Yes
1012	Fuel Surcharge - Commercial	Yes
1013	Fuel Surcharge - Roll Off	Yes
1014	Fuel Surcharge - Residential	Yes
1015	Fuel Surcharge 10%	Yes
1016	Fuel Surcharge \ Environmental	Yes
1017	CCMSW - Fuel Surcharge 10%	Yes
1018	CCMSW - Fuel Surcharge 15%	Yes
1019	CCMSW - Fuel Surcharge 9%	Yes
<div> <div>3</div> <div>+</div> </div>		
NAME ↑		
Dayton Franchise Fee	4	
CCMSW Fee - Yardage	-	
Fuel Surcharge 9%	-	

Pathway: Setup > Services > Surcharge Group

## Tax Region Setup & Tax Rate - Enhancements Made To Screen (16229)

### Tax Region Setup

The following enhancements have been made to the Tax Region Setup screen:

#### Tax Region Setup - Upper Grid

1. An Excel Export button was added.
2. A Search option has been added.

#### Tax Region Setup - Tax Rate (tab)

1. The Type column in the Tax Rate tab has been updated to displays the tax type as a 'Percentage %' or 'Flat.'
  - Percentage % will display for percentage tax rates.
  - Flat displays for Per Unit and Flat rates.
2. The Tax Rate ID and Tax Region columns have been removed.

TAX REGION SETUP					SETUP > ACCOUNTING > TAX REGION	
<div> <div>+</div> <div>1</div> <div>2</div> <div>3</div> <div>Search</div> </div>						
TAX REGION ID	NAME	MAP AREA	ERP LABEL	ACTIVE		
1000	AUSTIN CITY-MTA-ETGW		12345	Yes		
1001	BLANCO ESD 1 BSLD		12345	Yes		
1002	BLANCO CO ESD 2 BSLD			Yes		
1003	COMAL CO ESD 7			Yes		
1004	CALDWELL COUNTY			Yes		
1005	CALDWELL CO ESD 1-A			Yes		
1006	CALDWELL CO ESD 2			Yes		
1007	CALDWELL-HAYS ESD 1A			Yes		
1008	COMAL CO ESD 6			Yes		
1009	AUS-COMAL ESD 3 CLLD			Yes		
1010	COMAL CO ESD 4 CLLD			Yes		
1011	DRIPPING SPRNGS CITY			Yes		
1012	FAYETTE COUNTY			Yes		
1013	GONZALES COUNTY			Yes		
Tax Rate						
<div> <div>+</div> <div>4</div> </div>						
TAX	ERP LABEL	LEVEL	TYPE	RATE	START DATE	
TEXAS STATE		Tax	Percentage %	6.25%	01/01/23	-
CALDWELL COUNTY		Tax	Percentage %	0.5%	01/01/23	-
CALDWELL HAYS ESD 1A		Tax	Percentage %	1.5%	01/01/23	-
FLATTAX		Tax	Flat	\$ 5.00	02/01/24	-
AMES CITY		Tax	Percentage %	3%	02/02/24	-

## Tax Setup

The following enhancements have been made to the Tax Setup screen:

1. An Excel Export button was added.
2. A Search option has been added.

TAX SETUP									SETUP > ACCOUNTING > TAX	
<div> <div>+</div> <div>1</div> <div>2</div> <div>Search</div> </div>										
ID ↑	NAME	TYPE	GL ACCOUNT	LEVEL	TAXABLE	ADMIN AREA	TAX AUTHORITY TYPE	TAX AUTHORITY CODE		
1000	E TRAVIS COUNTY GATEW...	Percentage %	Sales Tax Payable	Tax	Yes			5227579		
1001	BLANCO COUNTY	Percentage %	Sales Tax Payable	Tax	Yes			4016002		
1002	BLANCO CO ESD 1	Percentage %	Sales Tax Payable	Tax	Yes			5016529		
1003	BLANCO CO S LIB DIST	Percentage %	Sales Tax Payable	Tax	Yes			5016501		
1004	BLANCO CO ESD 2	Percentage %	Sales Tax Payable	Tax	Yes			5016538		
1005	BUDA CITY	Percentage %	Sales Tax Payable	Tax	Yes			2105031		
1006	CALDWELL COUNTY	Percentage %	Sales Tax Payable	Tax	Yes			4028008		
1007	CALDWELL HAYS ESD 1A	Percentage %	Sales Tax Payable	Tax	Yes			5028507		
1008	COMAL COUNTY	Percentage %	Sales Tax Payable	Tax	Yes			4046006		
1009	COMAL CO ESD 7	Percentage %	Sales Tax Payable	Tax	Yes			5046587		
1010	COMAL CO ESD 6	Percentage %	Sales Tax Payable	Tax	Yes			5046532		
1011	COMAL ESD 3 CLLD	Percentage %	Sales Tax Payable	Tax	Yes			5046523		

Pathways: Setup > Accounting > Tax Region; Setup > Accounting > Tax

## Operations (Setup) - Disposal / Ship Location Automatic Transfer Work Order Issue Resolved (16171)

The issue preventing the selected transfer site from loading in the Automatic Transfer Work Order section of the Disposal / Ship Location screen has been resolved.

UPDATE DISPOSAL / SHIP LOCATION

Basic Settings

Label Scale Settings

NAME	QA Waste Transfer	ACTIVE	Active
ABBREVIATION	QA	ENABLE INBOUND ORDER	Yes
TYPE	Transfer Station	ENABLE OUTBOUND ORDER	Yes
OWNERSHIP	Internal	DEFAULT SCALE UOM	ton
DIVISION	DAYTON	WEIGHT UOM	ton
ADDRESS LINE 1	1234 Meeting St	VOLUME UOM	cubic yard
ADDRESS LINE 2		DEFAULT TRANSPORTATION METHOD	Truck
QTY	Houston	DEFAULT SCALE TICKET FORMAT	
STATE	TX	ONLINE ICON	Select Icon... BROWSE...
POSTAL CODE	45069	SIGNATURE	Select Signature BROWSE...
PHONE	+ (513) 555-6565		View Signature
CONTACT NAME	Stan Man	MANIFEST SIGNATURE NAME	Stan Manny
EPA ID	D_EPA234	LINK SITE	
STATE ID	D_ST234		
GEOFENCE RADIUS (METERS)	31		
AVERAGE DURATION (MINS)	0		
INTER-COMPANY BILL FROM ACCOUNT			
INTER-COMPANY CHARGE CODE			

Automatic Transfer Work Order

SITE ID

48917000001

SITE NAME

QA Waste Transfer

SERVICE CODE

Manifest Consolidation

EVENT TYPE

Outbound / Shipping

Saved.

Pathway: Setup > Operations > Disposal / Ship Location

## Tax Region - Add/Edit Tax Rate Enhancements (16234)

The following enhancements have been made to the Add/Edit Tax Rate editor:

1. The name of the editor has changed from 'Tax Region Taxes' to 'Add / Edit Tax Region.'
2. The 'Tax Type' has been added to display at the end of the taxes listed in the drop down menu.
3. The 'Start Date' field has been renamed to 'Effective Date.'

**1** ADD / EDIT TAX RATE

TAX REGION FAYETTE COUNTY

**2** TAX

ERP LABEL

**3** EFFECTIVE DATE

RATE

SAVE

Pathway: Setup > Accounting > Tax Region

### Reason Code Setup - 'Invoice Adjustment' Reason Code Type Updated (16258)

The 'Invoice Adjustment' reason code type has been modified, and the GL Account drop-down field is no longer included.

REASON CODE SETUP

+ TYPE Invoice Adjustment

TYPE ↑	LINE OF BUSINESS	REASON CODE ↑
Invoice Adjust...		123INVADJ
Invoice Adjust...		ADJ-TEST
Invoice Adjust...		BALWRT_OFF
Invoice Adjust...		
Invoice Adjust...		
Invoice Adjust...		
Invoice Adjust...		
Invoice Adjust...		
Invoice Adjust...		

**ADD REASON CODE**

TYPE

ID

NAME

ACTIVE Yes

SAVE

Pathway: Setup > System > Reason Code > Add Reason Code

Related Articles: [Reason Code Setup](#)

### Disposal/Ship Location Setup - Search Filter Added to Material Type Tab (16217)

The Disposal/Ship Location Setup screen has been improved by adding a search filter within the Material Type tab.

DISPOSAL / SHIP LOCATION SETUP

SETUP > OPERATIONS > DISPOSAL / SHIP LOCATION

TYPE

All

DIVISION

All

Search

ID	NAME	ABBREV	DIVISION	TYPE	ACTIVE	ADDRESS LINE 1	CITY	STATE	POSTAL CODE	SCALE UOM	WEIGHT UOM	VOLUME UOM	OWNERS...	SIGNATURE BY	SIGN	ICON
1001	CITY OF ALICE LF	ALICE	CORPUS	Landfill	Act...	3217 N ...	Alice	TX	783...	ton	ton	cubi...	Third P...			<a href="#">View</a>
1002	CEFE LF	CEFE	CORPUS	Landfill	Act...	2397 Co ...	Robstown	TX	783...	ton	pound	cubi...	Third P...			
1003	GULLEY HURST LF	GULH	CORPUS	Landfill	Act...	1435 Co ...	Corpus C...	TX	784...	ton	ton	cubi...	Internal			
1004	RSG-MAT & RECY...	MAT	DAYTON	Recycle...	Act...	3995 FM...	Conroe	TX	773...	ton	ton	cubi...				
1005	WM-BAYTOWN LF	WMBAY	DAYTON	Landfill	Act...	4791 Tri ...	Baytown	TX	775...	ton	ton	cubi...				
1006	WM-ATASCOCITA...	WMATA	DAYTON	Landfill	Act...	3623 Wil...	Humble	TX	773...	ton	ton	cubi...	Third P...			
1007	RSG-EL CENTRO LF	ELCNT	CORPUS	Landfill	Act...	69	Robstown	TX	783...	ton	ton	cubi...				
1008	WM-SECURITY LF	WMSEC	DAYTON	Landfill	Act...	19248 T...	Cleveland	TX	773...	ton	ton	cubi...	Third P...			
1009	WCA-RALSTON R...	WCARA	DAYTON	Landfill	Act...	6632 Joh...	Houston	TX	770...	ton	ton	cubi...	Internal			
1010	CITY OF KINGSVI...	KINGS	CORPUS	Landfill	Act...		Kingsville	TX	783...	ton	ton	cubi...				
1011	WCN-HARDY RO...	WCNHA	DAYTON	Transfe...	Act...	18784 E ...	Houston	TX	770...	ton	ton	cubi...				
1012	CHAMBERS COU...	CHAMB	DAYTON	Landfill	Act...	7245 Vet...	Lanett	AL	368...	ton	ounce	cubi...	Internal			
1013	DOLPHIN RECYCL...	DOLPH	CORPUS	Recycle...	Act...	717 Lest...	Corpus C...	TX	784...	ton	ton	cubi...				

Division

Material Type

Disposal Rate

Target Usage

Business Hours

Areas/Grids

Search

MATERIAL TYPE ID

MATERIAL TYPE

Pathway: Setup > Operations > Disposal/Ship Location

## Services (Setup) - Surcharge Setup Updated (16224)

The following changes have been applied to the Surcharge Rate Setup screen:

- A 'Show Rate History' check box has been added. By default, it is unchecked, allowing for the display of only current and future surcharge rates.
- The Surcharge Rate tab includes multiple updates:
  - A 'Created By User' and timestamp tooltip has been added to the Division, Service Region, and Effective Date columns. To view the tooltip, hover the mouse over the effective date.
  - A 'Ended By User' and timestamp tooltip has been added to the End Date column. To view the tooltip, hover the mouse over the end date.
  - The Rate column has been updated to match the surcharge rate type.
  - A delete option has been added to surcharge rates and will allow for a rate to be deleted if it hasn't been used on an AR record.
  - Background color coding has been applied to the surcharge rows, determined by the effective date and end date.
    - Red = Indicates the surcharge rate has a future end date.
    - White = Indicates the surcharge rate does not have an end date.
    - Purple = Displays for rates with a future dated Effective Date.
- Changes to Add/Update Surcharge Rate popup editor:
  - End Date and Note fields have been added.
  - Edit logic has been applied to only allow the editing of the End Date and Note if the surcharge is associated to a AR record.
    - If the surcharge is linked to an AR record, the end date must fall after the most recent AR record's date.

**SURCHARGE SETUP**

ID ↑	NAME	TYPE	RATE INDEX
1004	Dayton Franchise Fee	Percentage %	
1005	Liberty Franchise Fee	Percentage %	
1007	CCMSW Fee - Yardage	Per Cubic Yard	
1008	Pearland Franchise Fee	Percentage %	
1009	Fuel Surcharge-Commercial	Percentage %	
1010	Fuel Surcharge-Residential	Percentage %	
1011	Fuel Surcharge-Roll Off	Percentage %	
1012	Fuel Surcharge 10%	Percentage %	
1013	Fuel Surcharge 15%	Percentage %	
1014	Fuel Surcharge 9%	Percentage %	
1015	Fuel Surcharge-Rate Index	Rate Index %	DOE Fuel Index
1016	Environmental Surcharge	Percentage %	

**UPDATE SURCHARGE RATE**

SURCHARGE: Fuel Surcharge 15% 3

DIVISION: HOUSTON

SERVICE REGION:

RATE: 15

EFFECTIVE DATE: 01/01/2000

END DATE:

NOTE:

**SAVE**

**Surcharges**

+ ☐ Show Rate History 1

DIVISION ↑	SERVICE REGION ↑	EFFECTIVE DATE ↑	END DATE	RATE	NOTE
CORPUS		01/01/2000		15%	
DAYTON		01/01/2000	01/30/2024	15%	
HOUSTON		01/01/2000		15%	
QAWASTE		01/01/2024	01/31/2024	7%	
QAWASTE		02/01/2024		11%	

**Pathway:** *Setup > Services > Surcharge*

### Accounts - Users Appearing Available For Tasks Without Permission 347 (16314)

Previously, an issue occurred with the "Add Task" feature, where all users were displayed in the drop down list for "Assigned To," contrary to the expected behavior of only displaying users with permission 347 (Assignable to Tasks). This has been resolved.

ADD TASK

?

✕

CREATED BY

Isabel Navarro Monday February 3, 2024 01:50 pm

TYPE

ASSIGNED TO

Isabel Navarro - Intern

Dave Pike - Support Analyst

David Navarro - Admin-NS (Admin)

Deara Nikolouzos - Sales Rep (Sales)

Dereck Curtis - Terminated-NS (Admin)

Ed Sulek

Emilio Natarén - Admin-NS (Admin)

Ferlin Justice - Dispatcher (Operations)

FWS\_Test User - Test (Admin)

Gabriel Paul - Dispatcher (Operations)

Holley Pate - Director of Implementation

House Acct non System - House Account (Sales)

Isabel Navarro - Intern

PRIORITY

Low

DUE DATE

REPEAT

None

NOTE

COMPLETION NOTE

COMPLETE?

☐

USER

DATE

NOTE

NOTIFY CONTACT

SAVE

CANCEL

**Pathway:** Accounts > Customer Service Screen > + Menu > Task; Setup > System > Permission

### Line of Business (Setup/Services) - Field Added to Mobile Tab (16302)

An 'Enable Completion Note Entry' check box has been added to the Mobile tab of the Add/Update Line of Business screen. By selecting this option, drivers will be able to include a completion note along with the service record.

The screenshot shows the 'LINE OF BUSINESS SETUP' interface. On the left is a table of line of business types. The 'UPDATE LINE OF BUSINESS' modal is open, showing the 'Mobile' tab. The 'ENABLE COMPLETION NOTE ENTRY' checkbox is checked and highlighted with a red box.

ID	NAME
DOCDEST	Document Destruction
FEL	Commercial
HAZ	Hazardous Material
LF	Landfill
MEDICAL	Medical Waste
MISC	Miscellaneous
RESI	Residential
RO	Roll Off
SCALE	Scale
UO	Used Oil Collection

**UPDATE LINE OF BUSINESS**

LOB ID: RO  
NAME: Roll Off  
ACTIVE: Yes

Tabs: Settings | **Mobile** | Optimization | Self-Service Ordering | Profitability

DAYS AVAILABLE TO DRIVER: Last, Current, & Next Week  
AUTO COMPLETE SECONDS: 5

RECEIPT HEADER TEXT:   
ACKNOWLEDGEMENT TEXT:

**ENABLE COMPLETION NOTE ENTRY** ☒

Pathway: Setup > Services > Line of Business

### Account Class Setup - Default Work Order Attachment Display in Customer Portal (16260)

The Account Class Setup's Account Portal tab has been enhanced with a new checkbox option: 'Default Work Order Attachment - Display in Customer Portal.' Enabling this option will automatically check the 'Display In Customer Portal' checkbox when adding an attachment to the Service Record.

The screenshot shows the 'UPDATE ACCOUNT CLASS' interface with the 'Account Portal' tab selected. The 'DEFAULT WORK ORDER ATTACHMENT - DISPLAY IN CUSTOMER PORTAL' checkbox is checked and highlighted with a red box.

**UPDATE ACCOUNT CLASS**

Tabs: Details | **Account Portal** | Payment Processing | Status Management | Finance Charges / Late Fees

ENABLE PORTAL ACCESS: Yes  
ACCOUNT PORTAL HOME PAGE: Calendar View  
ENABLE ADD SITES: No  
NEW LOCATION TEMPLATE:   
NEW LOCATION BUNDLE:   
ENABLE ON CALL ORDERS: No  
ENABLE REPORT ACCESS: Yes  
ENABLE VIEWING INACTIVE SITE: No  
DEFAULT WORK ORDER PHOTO - DISPLAY IN CUSTOMER PORTAL: Yes  
**DEFAULT WORK ORDER ATTACHMENT - DISPLAY IN CUSTOMER PORTAL: No**

Pathway: Setup > Accounts > Account Class

### Task Type (Setup) - NavuNav Created Tasks Not Routing to Default User (16313)

The issue of tasks created in NavuNav being incorrectly assigned to the supervisor on the route, rather than the

default user assigned in Task Type Setup, has been resolved.

TASK TYPE SETUP				
+				
TASK ID	NAME	TYPE	ASSIGN TO DEFAULT	ASSIGN TO DEFAULT
1	Proposal Follow Up	Internal Site Level	Account Manager	
2	Send Proposal	Internal Site Level	Account Manager	
3	Send Marketing Material	Internal Site Level	Account Manager	
4	Pick Up Bid Package	Internal Site Level	Account Manager	
5	Complete Proposal	Internal Site Level	Account Manager	
6	Update Proposal	Internal Site Level	Account Manager	
7	Pick Up Check	Internal Site Level	Account Manager	
8	Complaint Follow Up	Internal Site Level	Account Manager	
9	Send Insurance Certificate	Internal Site Level	Account Manager	
10	Confirm appointment	Internal Site Level	Account Manager	
12	Follow Up	Internal Site Level	Account Manager	
13	Driver Note	Navu Nav Site Level	Supervisor	
14	Billing/AR question	Internal Account Level	None	
15	Initial Contact	Internal Site Level	Account Manager	
16	Credit Request	Internal Account Level	Account Auditor	
17	Status Change Request	Internal Account Level	None	
18	Follow-Up Phone Call	Internal Site Level	Account Manager	
19	Send E-Mail	Internal Site Level	Account Manager	
20	CR-Billing Question	Navu Nav Site Level	Account Manager	
21	Send LOC reminder	Internal Site Level	Account Manager	
22	Customer Support	External Site Level	Account Manager	
23	Casters	Navu Nav Site Level	Supervisor	
24	Locks	Navu Nav Site Level	Supervisor	
25	Enclosure	Navu Nav Site Level	Supervisor	
26	Test - NavuNav Inte	Internal Site Level	Account Manager	Aliena Somers
27	Test - Ext Acct Lev	Internal Account Level	None	
28	INACTIVE	Navu Nav Site Level	Account Manager	
29	DAMAGE	Navu Nav Site Level	Account Manager	
30	NavuNav Task	Navu Nav Site Level	Specific User	P G

**Pathway:** *Setup > Account > Task Type*

## Reason Code (Setup) - New 'Capture Competitor' Option Added (16334)

The 'Capture Competitor' field has been made available to Add Service type reason codes when previously this field was limited to only the End Service type reason codes. Once enabled, a 'Current Competitor' field will display on the Add Active Service screen in Accounts.

[illegible]

**Pathway:** *Setup > System > Reason Code*

## Services (Setup) - Service Code and Charge Code Grids Updated to Include Additional Fields (16323)

### Service Code Setup

The following fields have been added to the grid section of the Service Code Setup screen:

- Is Shell
- Bill Zero Amount
- Enable Routing
- Require Frequency
- Enable Driver Update
- Enable Account Signature
- Enable Driver Signature
- Enable Work Order Minimum
- Enable Rental Fee
- Enable Default Destination
- Enable Negative Amount
- Enable Estimates Tracking
- Enable Equipment Ownership
- Enable Share
- Enable Share
- Enable Vendor
- Enable Site Service Class
- Enable Discounts
- Composition Material Class

SERVICE CODE SETUP													SETUP > SERVICES > SERVICE CODE	
+ LINE OF BUSINESS		Commercial	EQUIPMENT TYPE		All	MATERIAL TYPE		All	<input checked="" type="checkbox"/> Hide Inactive	<div><div></div></div> Search	<input type="text"/>	<div><div></div></div>		
ID	NAME ↑	MONTHLY VOL UOM	IS SHELL	PRICING MODEL	CALCULATE RATE PER YARD	WORK TYPE EVENT CLASS	BILL ZERO AMOUNT	ACTIVE	ENABLE ROUTING	REQUIRE FREQUENCY	ENABLE DRIVER UPDATE	ENABLE ACCOUNT SIGNATURE		
FL10R	10 Yard Recycle Service43		No	None	No	Front Load Ser...	No	Yes	Yes	Yes	No	No		
FL10T	10 Yard Trash Service		No	None	Yes	Front Load Ser...	Yes	Yes	Yes	Yes	No	No		
FLO2R	2 Yard Recycle Service		No	None	Yes	Front Load Ser...	Yes	Yes	Yes	Yes	No	No		
FLO2T	2 Yard Trash Service		No	None	No	Front Load Ser...	No	Yes	Yes	Yes	No	No		
FLO2NP	2 Yard Trash Service - No Prorate		No	None	No	Front Load Ser...	No	Yes	Yes	Yes	No	No		
FLO2VIPR	2 Yard VIP Recycle Service		No	None	Yes	Front Load Ser...	No	Yes	Yes	Yes	No	No		
FLO2VIPT	2 Yard VIP Trash Service		No	None	No	Front Load Ser...	No	Yes	Yes	Yes	No	No		
FL02CDSE	2 YD FL Calendar Days Start and End		No	None	No	Front Load Ser...	No	Yes	Yes	Yes	No	No		
FL02SVCSO	2 YD FL Services Start Only		No	None	No	Front Load Ser...	No	Yes	Yes	Yes	No	No		
FL02NWK	2 YD No Work Class		No	None	No		No	Yes	Yes	Yes	No	No		
FL02PEOC	2T Trash - Prorate end only Calendar		No	None	No	Front Load Ser...	No	Yes	Yes	Yes	No	No		

### Charge Code Setup

The following fields have been added to the grid section of the Charge Code Setup screen:

- Is AP Transaction
- Rate Index
- Threshold Dis. Rate
- Enable Threshold
- Active
- Enable No Charge Quantity
- Enable Negative Amount
- Enable Max. Weight Charge
- Max. Weight Charge UOM
- Estimated Average Weight
- Enable Manual Charge
- Enable Minimum
- Enable Vendor
- Enable Est. Charge Quantity
- Pricing Model
- Bill Zero Amount Charge
- Default Quantity
- BIC Reportable
- BIC Waste Type
- Hide in NavuNav
- Require Collection Test
- Print Label

CHARGE CODE SETUP													SETUP > SERVICES > CHARGE CODE		
<div><div></div>LINE OF BUSINESS</div> Commercial		<div><div></div>EQUIP TYPE</div> All		<div><div></div>MATERIAL TYPE</div> All		<div><input checked="" type="checkbox"/> Hide Inactive</div>		<div><div></div>Search</div>					<div><div></div></div>		
ID	NAME ↑	OLD	ACTIVE	ENABLE NO CHARGE QUANTITY	ENABLE NEGATIVE AMOUNT	ENABLE MAX. WEIGHT CHARGE	MAX. WEIGHT CHARGE UOM	ESTIMATED AVERAGE WEIGHT	ENABLE MANUAL CHARGE	ENABLE MINIMUM	ENABLE VENDOR	ENABLE EST. CHARGE QUANTITY	PRICING MODEL	BILL ZERO AMOUNT CHARGE	
ADJ-CO	Adjustment-Commercial		Yes	No	Yes	No			Yes	No	No	No	None	No	
FLBULK	Bulk Pickup		Yes	No	No	No			No	No	No	No	None	Yes	
FL02XP	Front Load 02YD Extra Pickup		Yes	No	No	No			No	No	No	No	None	No	
FL03XP	Front Load 03YD Extra Pickup		Yes	No	No	No			No	No	No	No	None	No	
FL04XP	Front Load 04YD Extra Pickup		Yes	No	No	No			No	No	Yes	No	None	No	
FL06XP	Front Load 06YD Extra Pickup		Yes	No	No	No			No	No	Yes	No	None	No	
FL08XP	Front Load 08YD Extra Pickup		Yes	No	No	No			No	No	No	No	None	No	
FL10XP	Front Load 10YD Extra Pickup		Yes	No	No	Yes - Flat Charge	pound		No	No	No	No	None	No	
FLDEL	Front Load Delivery		Yes	No	No	No			Yes	No	Yes	No	None	Yes	

Pathway: Setup > Services > Service Code; Charge Code

## Accounts - Users Appearing Available For Tasks Without Permission 347 (16314)

Previously, an issue occurred with the "Add Task" feature, where all users were displayed in the drop down list for "Assigned To," contrary to the expected behavior of only displaying users with permission 347 (Assignable to Tasks). This has been resolved.

ADD TASK

CREATED BY

Isabel Navarro Monday February 3, 2024 01:50 pm

TYPE

ASSIGNED TO

Isabel Navarro - Intern

Priority

Operations Supervisor (Operations)

PRIORITY

Low

DUE DATE

REPEAT

None

NOTE

COMPLETION NOTE

COMPLETE?

☐

USER

DATE

NOTE

NOTIFY CONTACT

Isabel Navarro - Intern

SAVE

CANCEL

Pathway: Accounts > Customer Service Screen > + Menu > Task; Setup > System > Permission

## Line of Business (Setup/Services) - Field Added to Mobile Tab (16302)

An 'Enable Completion Note Entry' check box has been added to the Mobile tab of the Add/Update Line of Business screen. By selecting this option, drivers will be able to include a completion note along with the service record.

**LINE OF BUSINESS SETUP**

ID	NAME
DOCDEST	Document Destruction
FEL	Commercial
HAZ	Hazardous Material
LF	Landfill
MEDICAL	Medical Waste
MISC	Miscellaneous
RESI	Residential
RO	Roll Off
SCALE	Scale
UO	Used Oil Collection

**UPDATE LINE OF BUSINESS**

LOB ID

RO

NAME

Roll Off

ACTIVE

Yes

Settings

Mobile

Optimization

Self-Service Ordering

Profitability

DAYS AVAILABLE TO DRIVER

Last, Current, & Next Week

AUTO COMPLETE SECONDS

5

RECEIPT HEADER TEXT

ACKNOWLEDGEMENT TEXT

ENABLE COMPLETION NOTE ENTRY

☒

Pathway: Setup > Services > Line of Business

### Account Class Setup - Default Work Order Attachment Display in Customer Portal (16260)

The Account Class Setup's Account Portal tab has been enhanced with a new checkbox option: 'Default Work Order Attachment - Display in Customer Portal.' Enabling this option will automatically check the 'Display In Customer Portal' checkbox when adding an attachment to the Service Record.

**UPDATE ACCOUNT CLASS**

Details

Account Portal

Payment Processing

Status Management

Finance Charges / Late Fees

ENABLE PORTAL ACCESS

Yes

ACCOUNT PORTAL HOME PAGE

Calendar View

ENABLE ADD SITES

No

NEW LOCATION TEMPLATE

NEW LOCATION BUNDLE

ENABLE ON CALL ORDERS

No

ENABLE REPORT ACCESS

Yes

ENABLE VIEWING INACTIVE SITE

No

DEFAULT WORK ORDER PHOTO - DISPLAY IN CUSTOMER PORTAL

Yes

DEFAULT WORK ORDER ATTACHMENT - DISPLAY IN CUSTOMER PORTAL

No

Pathway: Setup > Accounts > Account Class

### Task Type (Setup) - NavuNav Created Tasks Not Routing to Default User (16313)

The issue of tasks created in NavuNav being incorrectly assigned to the supervisor on the route, rather than the default user assigned in Task Type Setup, has been resolved.



## Accounting (Setup) - Update to 'One Invoice Per PO' Setting Field (16365)

The 'One Invoice Per PO' field in Bill Group setup has been renamed to 'One Invoice Per' and now includes the following setting options: *Disabled*, *PO Number*, and *Work Order Number*.

UPDATE BILL GROUP

Settings

Notifications

ID	QABILL	INVOICE EMAIL FROM	admin@navusoft.com
ACTIVE	Yes	PRINT SEQUENCE	Invoice Number
NAME	QA Billing Cycle	INVOICE LOGO	Select Image BROWSE...
DIVISION	QAWASTE	UPLOADED INVOICE LOGO	Select Image BROWSE...
TYPE	Advance	INVOICE LOGO 2	Select Image BROWSE...
FREQUENCY	Monthly	UPLOADED INVOICE LOGO 2	
INVOICE FORMAT	Ryse Invoice 1	WORK ORDER HEADER TEXT	
BILLING EXPORT FORMAT		SURCHARGE HEADER TEXT	
CUSTOMER PORTAL URL		FINANCE CHARGES TEXT	Finance Charges
INVOICE MESSAGE		BILLING AUTO PAY PROCESS DATE	
		SCHEDULED AUTO PAY TIME	12:00 AM Central Standard Time
MESSAGE DUE IN PAST 1-30 DAYS		PAPER BILL FEE CHARGE CODE	Paper Bill Fee
MESSAGE DUE IN PAST 30-60 DAYS		PAPER BILL FEE (PER INVOICE)	2.50
MESSAGE DUE IN PAST 61-90 DAYS		MINIMUM INVOICE AMOUNT TO BE NOTIFIED	0.00
MESSAGE DUE IN PAST 91 DAYS		MINIMUM ACCOUNT BALANCE TO BE NOTIFIED	0.00
CUSTOM 1		ONE INVOICE PER	Disabled
CUSTOM 2		DISABLE AUTOMATIC BILLING BATCH CREATION	No

Pathway: Setup > Accounting > Bill Group

## Default Bill Group - Setup Not Being Followed For New Added Accounts (16406)

The default bill group established in the Default Bill Group Setup was not being retrieved when adding a new account with matching Account Division and Account Class.

**DEFAULT BILL GROUP SETUP**
SETUP > ACCOUNTING > DEFAULT BILL GROUP

ID	DIVISION	ACCOUNT CLASS	DEFAULT BILL GROUP
1000	CORPUS	COMMERCIAL	COR-COMM MON ADVANCE
1001	QAWASTE	COMMERCIAL	QA Billing Cycle

**CREATE ACCOUNT**
ACCOUNTS > ADD ACCOUNT

STATUS

Active

SOURCE

Acquisition

ACCOUNT DIVISION

QAWASTE

SITE DIVISION

QAWASTE

ACCOUNT CLASS

COMMERCIAL

Service Address

NAME

NAME 2

ADDRESS LINE 1

ADDRESS LINE 2

CITY/STATE/POSTAL CODE

PHONE

WEBSITE

POB

EPA

SIGNATURE REQUIRED

Billing Address

NAME

NAME 2

ATTN

ADDRESS LINE 1

ADDRESS LINE 2

CITY/STATE/POSTAL CODE

PHONE

CONTACT NAME

TITLE

CONTACT EMAIL

CONTACT PHONE

PHONE TYPE

BILLING CONTACT

Billing

BILL GROUP

QA Billing Cycle

INVOICE BY EMAIL

Net 20

TERM

500

CREDIT LIMIT

500

SURCHARGE GROUP

AUTO STATUS UPDATE

EXCLUDE FROM PAST DUE NOTIFICATION

APPLY FINANCE CHARGES

AP

DEFAULT PAYMENT METHOD

ACH

PAYEE

1099

SALES REP

SITE CLASS

SERVICE REGION

TAX REGION

ORIGIN

ACCOUNT CUSTOM PROPERTIES

SITE CUSTOM PROPERTIES

Pathway: Setup > Accounting > Default Bill Group

## Sales (Setup) - Logic Updated to Percentage Paid (16478)

In Commission Plans Setup, the Contract Term Months field has been enhanced to support a maximum value of 72.

**COMMISSION PLANS SETUP**

+

DIVISION

HOUSTON

PLAN ID	NAME	DESCRIPTION	CREATED BY
1002	Houston Commission		Aliena Somers

+

EXPAND ALL

COLLAPSE ALL

RULE ID
1004
1007
1008
1009

**EDIT COMMISSION RULE PARAMETERS**

?

×

RULE

Reason Code %

PARAMETER	VALUE	TYPE
*Reason Code	ADD-New Business	String
*Percentage Paid	10	%
LOB		String
Contract Term Months	72	Integer

SAVE

Pathway: Setup > Sales > Commission Plans

## Permissions (System) - Permission Changes - Action Needed (16530)

The following changes have been applied to permissions:

1. **Permission 92** (Override Work Order Charge Rate) was a duplicate of permission 336 (Edit Charge Code Rate for Work Order) and has been removed.
2. **Permission 326** has been renamed from "Modify Work Order Minimum Amount" to "Edit Work Order Minimum."
3. A new '**View Rates and Pricing for Work Order**' (**455**) permission has been added to restrict what users can see on the work order. If a user does not have permission 455, the following will be hidden from view, and any permissions allowing the editing of these fields will also be restricted:
  - Total shown on the Charges tab
  - WO Minimum field
  - Vendor Rate
  - Per Unit column
  - Minimum Type column
  - Minimum column
  - Total column



### Actions you need to take:

Currently, any role with permission 88 (View Dispatch) has also received permission 455. It is recommended to review your establishment's roles and remove the permission where necessary.

**PERMISSION SETUP** (SETUP > SYSTEM > PERMISSION)

PERMISSION ID	NAME	DESCRIPTION	MODULE	DOCUMENTATION TOPICS	DOCUMENTATION VIEW SCORE
455	View Rates and Pricing for Work Order		Operations	0	

**EDIT SERVICE RECORD**

WORK ORDER: 7393488, QTY: 1, SERVICE CODE: 2 Yard Trash Service, EQUIPMENT: 2YD, WORK TYPE: FL\_SERVICE, ORDER TYPE: Scheduled Service, MATERIAL: MSW

Charges \$ 65.00

WO MINIMUM

GROSS QTY	LABELS	NO CHARGE QTY	CHARGE QTY	UOM	CHARGE CODE	PER UNIT	VENDOR RATE	MINIMUM TYPE	MINIMUM	TOTAL
1			1	each	Front Load Relocate	\$ 65.00		None		\$ 65.00

Pathway: Setup > System > Permission

## Truck Setup (Site Inventory)- Logic Updated to "Mark Inactive" in Edit Truck Screen (16647)

The logic for marking a truck inactive has been updated to consider the truck's usage history and its assignment as a default truck for a route. These factors determine the prompts the user will see after selecting the "Mark Inactive" button. This update also resolves the issue of inactive trucks being removed from Site Inventory > Truck.

EDIT TRUCK

NAME

2001

TRUCK TYPE

DIVISION

HOUSTON

FUEL TYPE

Other

LINE OF BUSINESS

Commercial

VEHICLE INSPECTION TYPE

DVIR

OWNERSHIP

Internal

LICENSE PLATE

ODOMETER UOM

VIN

SPEED UOM

Capacity

Onboard Scale

Camera System

Maintenance Plan

Attributes

VOLUME CAPACITY

28.00

UOM

cubic yard

COMPACTION RATIO

WEIGHT CAPACITY

54900.00

UOM

pound

TARE WEIGHT

UOM

MARK INACTIVE

CONFIRMATION

Are you sure you want to inactivate this truck?

YES

NO

Pathway: Setup > Operations > Truck

## UN Hazardous Material Setup (\*NEW\* Setup > Operations) - New Screen and New Column Added to Material Type Setup Screen (16460)

A new UN Hazardous Material Setup screen has been added under Setup > Operations. The information entered into the UN Hazardous Material Setup screen is utilized to populate the drop down fields in the new UN Hazardous Material column within the Material Type Setup screen.

UN HAZARDOUS MATERIAL SETUP

SETUP > OPERATIONS > UN HAZARDOUS MATERIAL

+

ID

HAZARD CLASS

PACKING GROUP

Test12

3.00

3

UN1993

3.00

3

MATERIAL TYPE SETUP

SETUP > OPERATIONS > MATERIAL TYPE

+

ID

NAME

GL SEGMENT

EXTERNAL ID

IDENTIFIER

PACKAGE SIZE

MATERIAL CLASS

UN HAZARDOUS MATERIAL

NEED REPORTABLE

COMPOSITION MATERIAL CLASS

DEFAULT UOM

RECYCLABLE

BRICK

Brick

1

C&D

ton

No

BRUSH

Brush

1

RECYCLE

RECYCLE

No

C&D

C&D

1

C&D

No

CHEMO

Chemo

C

1

No

CLEARGLS

Clear Glass

1

GLASS

GLASS

pound

Yes

COLORGLS

Colored Glass

1

GLASS

GLASS

pound

Yes

CONCRETE

Concrete

1234567890123...

1

C&D

No

DIESELFUEL

Flammable Liquids ...

1

HAZARDOUS

UN1993

No

DIRT

Dirt & Clean Fill

1

C&D

No

HAZCHEM

Hazardous Chemicals

Haz Chemicals

X

1

HAZARDOUS

No

METAL

Metal

1

RECYCLE

RECYCLE

pound

Yes

MSW

MSW

1

MSW

MSW

pound

No

OCC

Cardboard

1

RECYCLE

RECYCLE

pound

Yes

OCCBALE600

OCC Bale 600 lbs

600

RECYCLE

pound

Yes

Material Type Value

Conversions

+

DIVISION

FACILITY

PROCESSING STATUS

EFFECTIVE DATE

VALUE

UOM

Pathway: Setup > Operations > Material Type/UN Hazardous Material

## Line of Business (Setup) - Updates to Setup Screen (16667)

The following changes have been applied to the Line of Business Setup screen:

1. Profitability tab renamed to 'Productivity and Profitability'

2. Route Calculation field renamed to 'Route Profitability Calculation'
3. Work Order Calculation renamed to 'Work Order Profitability Calculation'
4. Addition of new fields:
  - Route Operating Hours Calculation Method
  - Automatic 30 Minute Lunch Deduction
  - Downtime Deduction

**LINE OF BUSINESS SETUP**

ID	NAME	SCREEN TYPE	ENABLE MANIFEST PROCESSING	GL SEGMENT	WORK ORDER MINIMUM CHARGE CODE
DOCDEST	Document Destruction	1	No	DOC	
FEL	Commercial				
HAZ	Hazardous Waste				
INACTIVE	INACTIVE				
LF	Landfill				
MEDICAL	Medical Waste				
MISC	Miscellaneous				
RESI	Residential				
RO	Recycling				
SCALE	Scale				
UO	Unidentified				

**UPDATE LINE OF BUSINESS**

LOB ID: FEL

NAME: Commercial

ACTIVE: Yes

1. Self-Service Ordering

2. ROUTE PROFITABILITY CALCULATION: ((Time of first service - time of last service) \* operating cost per hour) + disposal cost

3. WORK ORDER PROFITABILITY CALCULATION: (Minutes (start time - end time) \* operating cost per minute) + disposal cost

4. ROUTE OPERATING HOURS CALCULATION METHOD: Log in and Log out timestamp

AUTOMATIC 30 MINUTE LUNCH DEDUCTION: No

DOWNTIME DEDUCTION: No

Pathway: Setup > Services > Line of Business

### Work Type Setup (Setup) - Modification to Alerts Tab and Notifications Added (16654)

The following enhancements have been applied to the Work Type Setup screen in the Alerts tab:

1. Notification Type has been split out into three columns: Notification, Type and Schedule
2. Two new service reminders have been added:
  - Service Reminder - On Call Services - 1 business day prior at 7am
  - Service Reminder - All Services - 1 business day prior at 7am

WORK TYPE SETUP

SETUP > OPERATIONS > WORK TYPE

LINE OF BUSINESS

All

ID	NAME	LOB	ACTION CATEG...	INVE... MOVE TYPE	MANIF... NOTIFI... TEMPL...	ORDER BASELINE SECONDS	DEFAULT SECONDS PER UNIT	CREATE ONE SERVICE RECORD PER QUANTITY	ENABLE DISPOSAL ENTRY	ENABLE DRIVER ENTERED LABEL WEIGHTS	ENABLE DRIVER PHOTO PROMPT	PRODUCTIVITY UNITS	ENABLE DRIVER TO SET IN PROGRESS
DDSV...	Document ...	Docu...	Swap	None			0	No	No	No	Yes	1	No
DEL_...	Deliver HAZ	Hazar...	Delivery	None			0	No	No	No	No	1	No
DUM...	Dump Only	Roll Off		None			0	Yes	Yes	No	No	1	No
FL_DE...	FL Delivery	Com...	Delivery	Deli...			0	No	Yes	No	No	1	No
FL_EX...	FL Exchange	Com...	Swap	Exc...			0	No	No	No	No	1	No
FL_EX...	FL Extra Pic...	Com...	Pick Up	None			0	No	No	No	No	1	No
FL_MI...	FL Missed P...	Com...		None			0	No	No	No	No	1	No
FL_M...	FL Move	Com...		None			0	No	No	No	No	1	No
FL_RE...	FL Relocate	Com...		None			0	No	No	No	No	1	No
FL_RE...	FL Removal	Com...	Remo...	Re...			0	No	No	No	No	1	No
FL_RE...	FL Repair	Com...	Repair	None			0	No	No	No	No	1	No
FL_SE...	FL Service	Com...		None	Servic...		600	No	No	No	No	1	No
INBO...	Inbound Lo...	Inbou...	Inbou...	None			0	No	Yes	No	No	1	No
new1	new1	Com...		None			0	No	No	No	No	1	No

Alerts

Surcharges

NOTIFICATION	TYPE	SCHEDULE	NOTIFICATION TEMPLATE	
Service Status Change	Completion Summary	Same day at 7pm		<input type="checkbox"/>
Service Status Change	Cancelled	Immediate upon status update	Service Notification-Cancelled - WO #@@workor...	<input checked="" type="checkbox"/>
Service Status Change	Not Serviced	Immediate upon status update		<input type="checkbox"/>
Service Reminder	Every x weeks services	3 calendar days prior at 7am	Service Reminder-Calendar - WO #@@workorder...	<input checked="" type="checkbox"/>
Service Reminder	Every x weeks services	2 calendar days prior at 7am	Service Reminder-Calendar - WO #@@workorder...	<input checked="" type="checkbox"/>
Service Reminder	Every x weeks services	1 calendar day prior at 7am	Service Reminder-Calendar - WO #@@workorder...	<input checked="" type="checkbox"/>
Service Reminder	Every x weeks services	3 business days prior at 7am	Service Reminder-Business - WO #@@workorder...	<input checked="" type="checkbox"/>
Service Reminder	Every x weeks services	2 business days prior at 7am	Service Reminder-Business - WO #@@workorder...	<input checked="" type="checkbox"/>
Service Reminder	Every x weeks services	1 business day prior at 7am	Service Reminder-Business - WO #@@workorder...	<input checked="" type="checkbox"/>
Service Reminder	Every x weeks services	1 business day prior at 7pm		<input type="checkbox"/>
Service Reminder	On call services	Same day at 7am		<input type="checkbox"/>
Service Reminder	On call services	1 calendar day prior at 7am		<input type="checkbox"/>
Service Reminder	On call services	1 business day prior at 7am		<input type="checkbox"/>
Service Reminder	All services	1 week prior at 7am		<input type="checkbox"/>
Service Reminder	All services	1 business day prior at 7am		<input type="checkbox"/>

Pathway: Setup > Operations > Work Type

## Database

### Bulk Update - Upload Source File Limited To CSV or XLSX Extensions (16124)

Bulk Update has been updated to only allow .csv or .xlsx file formats to be uploaded in Upload Source File.

BULK UPDATE					DATABASE > BULK UPDATE
<div> <div>+</div> <div>STATUS</div> <div>Pending</div> </div>					
<div> <div>TARGET TABLE</div> <div>All</div> </div>					
<div> <div>TARGET FIELD</div> <div>All</div> </div>					
<div> <div>Search</div> <div></div> </div>					
DESCRIPTION	STATUS	CREATED BY	PROCESSED BY	TARGET TABLE	
Bill Group Update	Pending	Isabel Navarro	(Inactive)	Account	<input type="checkbox"/>
Site Bill Group Update	Pending			Site	<input type="checkbox"/>
Bill Group Update	Pending			Account	<input type="checkbox"/>
Test	Pending			Site	<input type="checkbox"/>
Bill Group Update	Pending			Account	<input type="checkbox"/>
Bill Group Update	Pending			Account	<input type="checkbox"/>
PG Bill Group Update	Pending			Account	<input type="checkbox"/>
mvd_test	Pending			Site	<input type="checkbox"/>

ADD BULK UPDATE BATCH

DESCRIPTION

TARGET TABLE

TARGET FIELD

UPLOAD SOURCE FILE

Select File...

BROWSE...

SAVE

Pathway: Database > Bulk Update

Bulk Update - Status Background Color Added (16225)

An enhancement has been made to the Bulk Update screen to use background color indicators to identify the status of the update.

- **Green** - Processed status
- **Red** - Voided status
- **None** - Pending status

BULK UPDATE					DATABASE > BULK UPDATE	
	STATUS	All	TARGET TABLE	All	TARGET FIELD	All
Search						
DESCRIPTION	STATUS	CREATED BY	PROCESSED BY	TARGET TABLE		
Bill Group Update	Void	Larry Smith 08/07/23 1:46 am	(Inactive) 08/07/23 1:46 am	Account		
Bill Group Update	Void	Larry Smith 08/07/23 1:46 am	(Inactive) 08/07/23 1:46 am	Account		
bill group update	Processed	Larry Smith 08/07/23 9:06 pm	Larry Smith 08/07/23 9:06 pm	Account		
Bill Group Update	Pending	Larry Smith 08/07/23 9:53 pm	(Inactive) 08/07/23 9:53 pm	Account		
Site Surcharge Update	Processed	Larry Smith 08/07/23 11:28 pm	Larry Smith 08/07/23 11:28 pm	Site		
Site Bill Group Update	Pending	Larry Smith 08/07/23 11:29 pm	(Inactive) 08/07/23 11:29 pm	Site		
Bill Group Update	Pending	Larry Smith 08/11/23 8:45 pm	(Inactive) 08/11/23 8:45 pm	Account		

Pathway: Database > Bulk Update

Database Query - Updates to Disposal Records Query (16319)

The Disposal Records Query has been updated to include the disposal records associated with a site. The following fields were added:

- Site Name
- Site Address Line 2
- Site City
- Site Zip
- Site State
- Site Address Line 1

Database Query											Disposal Records by Date Range - 01/31/2024 2:18:50 pm	
1506 records											Search	
ROUTE	MATERIAL TYPE ID	MATERIAL	DRIVER	LINE OF BUSINESS ID	UOM	SITE NAME	SITE ADDRESS LINE 2	SITE CITY	SITE ZIP	SITE STATE	SITE ADDRESS LINE 1	
✚OR 302	MSW	MSW	John Doe	RO	ton	GOODWILL		CORPUS CHRISTI	78415-5314	TX	1234 Cascade ST	
✚OR 302	MSW	MSW	John Doe	RO	ton	GOODWILL		CORPUS CHRISTI	78415-5314	TX	1234 Cascade ST	
✚OR 302	MSW	MSW	John Doe	RO	ton	GOODWILL		CORPUS CHRISTI	78415-5314	TX	1234 Cascade ST	
✚OR 302	MSW	MSW	John Doe	RO	ton	GOODWILL		CORPUS CHRISTI	78415-5314	TX	1234 Cascade ST	
✚OR 302	MSW	MSW	John Doe	RO	ton	GOODWILL		CORPUS CHRISTI	78415-5314	TX	1234 Cascade ST	
✚OR 301	MSW	MSW	John Doe	RO	ton	GOODWILL		CORPUS CHRISTI	78415-5314	TX	1234 Cascade ST	
✚OR 301	MSW	MSW	John Doe	RO	ton	GOODWILL		CORPUS CHRISTI	78415-5314	TX	1234 Cascade ST	
✚OR 301	MSW	MSW	John Doe	RO	ton	GOODWILL		CORPUS CHRISTI	78415-5314	TX	1234 Cascade ST	
✚OR 301	MSW	MSW	John Doe	RO	ton	GOODWILL		CORPUS CHRISTI	78415-5314	TX	1234 Cascade ST	

Pathway: Database > Database Query

Database Query - Tax Details 3 New Fields Added (16321)

The following new fields have been added to the 'Tax Details' entity: Tax Name, Tax Authority Code, and Tax Authority Type Name.

The screenshot shows the 'Database Query' interface. The 'ENTITIES' section lists 'Tax Details'. The 'DISPLAY FIELDS' section shows a list of fields with checkboxes. The fields 'Tax Name', 'Tax Authority Code', and 'Tax Authority Type Name' are highlighted with a red box. The 'FILTERS' section is empty.

ENTITY	SEQ	FIELD	ALIAS	DESCRIPTION
<input type="checkbox"/>		Tax Details		Taxexempt
<input type="checkbox"/>		Tax Details		Division Id
<input type="checkbox"/>		Tax Details		Invoiceid
<input type="checkbox"/>		Tax Details		Totalsales
<input type="checkbox"/>		Tax Details		Taxablerevenue
<input type="checkbox"/>		Tax Details		Taxes
<input type="checkbox"/>		Tax Details		Siteid
<input type="checkbox"/>		Tax Details		Divisionname
<input type="checkbox"/>		Tax Details		Sitename
<input type="checkbox"/>		Tax Details		Addressline2
<input type="checkbox"/>		Tax Details		City
<input type="checkbox"/>		Tax Details		Taxregionid
<input type="checkbox"/>		Tax Details		Period Id
<input type="checkbox"/>		Tax Details		Tax Name
<input type="checkbox"/>		Tax Details		Tax Authority Code
<input type="checkbox"/>		Tax Details		Tax Authority Type Name
<input type="checkbox"/>		Tax Details		State
<input type="checkbox"/>		Tax Details		Addressline1

Pathway: Database > Database Query

## Database Query - 'Between' Operator Not Working for Timestamp Fields (16417)

A fix has been applied to the "Between" operator in Database Query that previously caused an error for time and date fields.

The screenshot shows the 'Database Query' interface. The 'ENTITIES' section lists 'Disposal Records'. The 'DISPLAY FIELDS' section shows a list of fields with checkboxes. The 'Disposaldate' field is highlighted with a red box. An 'EDIT FILTER' dialog is open, showing the 'between' operator and the dates '09/01/2021' and '09/30/2021'.





ENTITY	SEQ	FIELD	ALIAS	DESCRIPTION
<input checked="" type="checkbox"/>	1	Disposaldate		Disposaldate
<input checked="" type="checkbox"/>	2	Division Id		Division Id
<input checked="" type="checkbox"/>	3	Disposal Location Id		Disposal Location Id
<input checked="" type="checkbox"/>	4	Materialclass Id		Materialclass Id
<input checked="" type="checkbox"/>	5	Workordernumber		Workordernumber
<input checked="" type="checkbox"/>	6	Disposaluom Id		Disposaluom Id
<input checked="" type="checkbox"/>	7	Datetime		Datetime
<input checked="" type="checkbox"/>	8	Start Timestamp		Start Timestamp
<input checked="" type="checkbox"/>	9	Quantity		Quantity
<input checked="" type="checkbox"/>	10	Calculated Quantity		Calculated Quantity
<input checked="" type="checkbox"/>	11	Minimum Quantity		Minimum Quantity
<input checked="" type="checkbox"/>	12	Disposalrate		Disposalrate
<input checked="" type="checkbox"/>	13	Fee1		Fee1
<input checked="" type="checkbox"/>	14	Fee2		Fee2

Pathway: Database > Database Query

## Customer Portal

### Customer Portal - Option to Print Multiple Manifest Added (15816)

The Service History screen in the Customer Portal has been enhanced to allow users to select and print manifests for multiple work orders.

Service History						
From Period		Oct 2023	thru	Jan 2024	Print Selected	
<input type="checkbox"/>	SCHEDULED DATE ↓	ID	SERVICE	QTY	EQUIPMENT	WORK STATUS
<input type="checkbox"/>	 Fri 01/12/24	<a href="#">7261044</a>	FL Delivery	1	2 Yard FL	Service Completed
<input type="checkbox"/>	 Wed 11/8/23	<a href="#">7039366</a>	RO Delivery	1	30 Yard Co...	Service Completed
<input type="checkbox"/>	 Wed 10/18/23	<a href="#">6838798</a>	RO Delivery	1	30 Yard Rol...	Scheduled
<input type="checkbox"/>	 Wed 10/11/23	<a href="#">6805040</a>	RO Dump/Return	1	30 Yard Co...	Service Completed

### Pathway: Customer Portal

## Account Portal - Updates to Quick Pay and Add Payment Method Screens (15868)

The Quick Pay and Add Payment Method screens in the Customer Portal have been enhanced to minimize errors during payment entry or when adding a payment method. Notably, an eCheck Helper image has been included for 'Bank Account' transactions to aid users in the process.

Add Payment Method

Type

Bank Account

Name on Account

Account Number

Verify Account Number

Routing Number

Bank Account Type

Your Name

Your Address

Date

1001

Pay to the Order of

\$

Dollars

BANK NAME

Authorized Signature

123456789

0000987654321

1001

9 Digit Routing Number

Your Account Number

Check Number

☐

Accept Payment Terms and Conditions

Save

Cancel

Pathway: Customer Portal > Invoice Quick Pay or Make a Payment

## Account Request - Uploaded Photos Not Displaying (16405)

An issue has been resolved that was preventing an image uploaded in the portal from displaying in the Account Request and Account Request Management screens in Navusoft.

ACCOUNT REQUEST MANAGEMENT

DIVISION

ASSIGNED TO

TYPE

STATUS

All

All

Customer Request

Not Completed

Search

ID	TYPE	ASSIGNED TO	DATE	ACCOUNT/ SITE	CONTACT	NOTE	COMPLETED BY	COMPLETED ON
1502	Customer Request	Lori Jones	Thu May 4, 2023 06:20 ...	48910 QA Hospital 48910001 Q...	Lori	added on portal		
1503	Customer Request	Lori Jones	Thu May 4, 2023 06:22 ...	48910 QA Hospital 48910001 Q...	Lori	added on portal		
1504	Customer Request	Lori Jones	Thu May 4, 2023 06:23 ...	48910 QA Hospital 48910001 Q...	Lori	on portal - 3rd time		
1505	Customer Request	Lori Jones						
1507	Customer Request	House Account						
1508	Customer Request	House Acct non						
1509	Customer Request	House Acct non						
1511	Customer Request	House Acct non						
1514	Customer Request	Nikita Raiyani						
1516	Customer Request	House Account						
1518	Customer Request	Deara Nikolou						
1519	Customer Request	House Account						
1522	Customer Request	House Acct non						
1523	Customer Request	House Account						
1524	Customer Request	Bill Smith						
1525	Customer Request	Bill Smith						
1526	Customer Request	House Acct non						
1528	Customer Request	Matt lori gmail						
1529	Customer Request	House Acct non						
1530	Customer Request	House Account						
1531	Customer Request	House Account						
1535	Customer Request	Dave Pike						
1536	Customer Request	Dave Pike						
1538	Customer Request	Ed Sulek	Wed Feb 21, 2024 11:1...	30622 PIZZA HUT 30622001 PIZ...	Ed	This is a test of the cus...		
1539	Customer Request	House Account	Fri Feb 23, 2024 11:50 ...	30565 DOMINOS PIZZA 305650...	Paul G	Testing NAVU-16405		
1540	Customer Request	House Account	Mon Feb 26, 2024 07:1...	26034 Navu Waste INC 2603400...	Aliena	This is a photo Test		

ACCOUNT REQUEST

Details

Photos

Linked Items

+

DESCRIPTION	CREATED ON	DISPLAY IN CUSTOMER PO...	DELETE
	02/26/2024 9:15 am	Yes	

View

SAVE

DELETE

Pathway (Portal): Customer Portal > Requests

Pathway: Accounts > Account Request Management

## Customer Portal - 'Maximum Payment Amount' Field Displayed When Not Enabled (16420)

Previously, even when the 'Enable Auto Pay Max Amount' setting in System Options Setup was set to 'No,' the option remained visible on the Customer Portal. This issue has been resolved.

The image shows two parts of the software interface. On the left is the 'SYSTEM OPTIONS SETUP' screen with a tabbed interface. The 'Customer Portal' tab is selected and highlighted with a red box. In this tab, the 'ENABLE AUTO PAY MAX AMOUNT' option is set to 'No' and is also highlighted with a red box. On the right is a preview of the Customer Portal. It shows a 'Make a Payment' button, 'Invoice History', 'Manage Auto Pay', and 'Payment Methods' links. A modal window titled 'Manage Automatic Payments' is open, showing the 'Enable Automatic Payments' dropdown set to 'No'.

Pathway: Setup > System > System Options

## Customer Portal - Display Exception Next To Work Order Status (16544)

An enhancement has been made to the display of the work order's status in the Customer Portal, now including the name of the exception reason, if one exists.

The image shows the Customer Portal interface for account 21638 BIG STATE. It displays 'CURRENT SERVICES' with a table of services and their frequencies. Below this is a 'RECENT SERVICES' table. In the 'RECENT SERVICES' table, the entry for 'Mon Feb 26, 2024' with ID '7259940' is highlighted with a red box. The status for this service is '(Not Serviced - Bin Blocked)'. The 'SERVICE' column shows '4 Yard Trash Service'. There are also buttons for 'Make a Payment', 'Manage Auto Pay', 'Payment Methods', and 'Reports / Documents (3)'.

CURRENT SERVICES	FREQUENCY	NEXT SCHEDULED
1 - 10 Yard Trash Service	On Call	
1 - Roll Off Rental Monthly	On Call	
1 - 4 Yard Trash Service	1x per week	Mon April 15th
1 - 2 Yard Recycle Service	On Call	
1 - 35 Yard Compactor Ser...	2x per week	Thu April 11th
1 - 10 Yard Open Top Service	On Call	

RECENT SERVICES	ID	SERVICE
Mon Apr 15, 2...	7503874	4 Yard Trash Service
Mon Mar 25, ...	7403228 (Completed - Recycling Contaminated)	4 Yard Trash Service
Mon Feb 26, 2...	7259940 (Not Serviced - Bin Blocked)	4 Yard Trash Service
Mon Feb 5, 2024	7142482 (Not Serviced - Bin Overloaded)	4 Yard Trash Service
Mon Aug 14, ...	6303866 (Completed)	4 Yard Trash Service

Pathway: Customer Portal

## Customer Portal - Prospect Accounts No Longer Display In Customer Portal (16596)

An enhancement has been made to the Customer Portal, removing the display of 'prospect' accounts.

49037

testing - ticket 21852

7500 Bellaire Blvd  
Houston, TX 77036-5018  
US  
(O) +1 832-767-1856

Prospect

DIVISIONCORPUS  
ACCOUNT MGRAliena Somers  
CLASSCOMMERCIAL  
SOURCECold Call  
REBATE PAYMENTACH

49037001

testing - ti

1 of 1

7500 E  
Houst  
Harris  
US  
(O) +1

HIGHLIGHTS

CALENDAR

SUN

Mar

Ap

SELECT ACCOUNT1 of 10

SELECT SERVICE LOCATION1 of 3

41898 Navusoft Premier Waste And Recycling

21638 BIG STATE

23067 JACK IN THE BOX

24353 LARRY B

26034 CONSTRUCTION INC

28225 JAMES S

32457 T CONSTRUCTION

41898 Navusoft Premier Waste And Recycling

44766 Facility Services

48973 Crypto

49066 Elizabeth J

41898001 Navusoft - Demo Post Oak Blvd, Houston TX

RECENT SERVICES	ID	SERVICE
Wed Feb 28, 2...	7462298 (Completed)	30 Yard Open Top Se...
Fri Jan 12, 2024	7261044 (Completed)	2 Yard Trash Service
Wed Nov 8, 20...	7039366 (Completed)	30 Yard Compactor S...
Wed Oct 11, 2...	6805040 (Completed)	30 Yard Compactor S...
Fri Apr 21, 2023	5915744 (Credit Hold)	30 Yard Compactor S...

VIEW PREVIOUS AND FUTURE SERVICES

Invoice History

Manage Auto Pay

Payment Methods

Reports / Documents

Last Payment: 10-12-2023 - Bank Account 72873390\_ \$ 50.00

Pathway: Customer Portal