

# Release Version 72 [Archive]

Last Modified on 04/09/2026 7:39 am PDT



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

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

Expand All Sections

Collapse All Sections

## 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:

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


The screenshot displays the QA Login interface. At the top, there is a logo consisting of a magnifying glass with a red bug inside, next to a large black letter 'A'. Below the logo, the text 'QA Login' is displayed in red. The login form includes an email input field with the placeholder 'email@fakeEmail.com', a password input field with masked characters '\*\*\*\*\*', and a 'SHOW MY PASSWORD' checkbox. A red arrow points to the checkbox. Below the form 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:

- a. Core URL link added to display below the logo.  
b. Addition of a 'Show My Password' check box.  
c. The Save button has been renamed to 'Save and Login.'  
d. 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.
  - a. Addition of a 'Show My Password' check box.
  - b. Password requirements added as bulleted text.
  - c. The Submit button has been renamed to 'Save and Login.'

**RESET PASSWORD**
?
✕

ENTER RESET CODE

ENTER NEW PASSWORD

CONFIRM PASSWORD

1 SHOW MY PASSWORD

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

- Opt + Shift + S = Search
  - Opt + Shift + C = Create Account
  - Opt + Shift + O = Order Processing
  - Opt + Shift + B = Billing
  - Opt + Shift + M = Sales Management
  - Opt + Shift + D = Dispatch
  - Opt + Shift + Z = Back

## PC for Reference

- Alt + Shift + S = Search
  - Alt + Shift + C = Create Account
  - Alt + Shift + O = Order Processing
  - Alt + Shift + B = Billing
  - Alt + Shift + M = Sales Management
  - Alt + Shift + D = Dispatch
  - 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	CREATED BY	FILE NAME	DESCRIPTION
2024-04-17 9:56 am	Paul	NAVU-16356 Completing RO WO.jpg	<a href="#">View</a>

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
PROJECT ID	PROJECT NAME	TYPE	PROJ... MAN...	STATUS	START DATE	CO	ATTACHMENT COUNT	PERCENT COMPLETION	TASKS		
									OPEN	IN PROGRESS	COMPLETED
1030	Implemen... Template	New Customer Implemen...	Hol... Pate	In Progress	06/01/2023	06	0	0%	10	0	0
1131	Test Project	Internal Project	Nik... Rai...	Not Started	09/01/2023	05	1	0	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.

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

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: Proposal | DOCUMENT TYPE: A-New Business-From Compe | STATUS: Open | SOURCE: Employee

SALES REP: House Acct non System

TITLE:

EFFECTIVE DATE: 01/17/2024 | DELIVERY DATE: 01/17/2024

TERM: 24 Months

PRINT EST. SURCHARGE: No

NOTE:

DELIVERY INSTRUCTION:

PAYMENT REQUIRED AT CUR: 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 <a href="#">View History</a> 
QA Card	1111	Visa	04-30-2026	No			Inactive		Pineapple <a href="#">View History</a>
Test Navusoft	5123	Visa	05-31-2026	No			Active	Matthew Van Dor...	Pineapple <a href="#">View History</a> 

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

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 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

Scale Ticket Format 1

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: HARRIS COUNTY-HOUSTON MTA-  
 ADDRESS LINE 2:      TAX REGION: [checked]      TAX REGION: [checked]  
 CITY/ST:      ORIGIN: [checked]

**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

NOTE: [Text Area]

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      TICKET NUMBER: 41017      WORK ORDER: 6536138      QTY: 1      SERVICE CODE: Scale Inbound Services      WORK TYPE: SCALE\_POST      ORDER TYPE: Inbound / Receiving  
 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: [Text Area]

ORDER NOTES: [Text Area]

TRUCK: [Text Area]      VEHICLE INFO: [Text Area]      PO NUMBER: [Text Area]      EXTERNAL ID: [Text Area]

MATERIAL: MSW      RECEIVING LOCATION: HOMEBASE      TANK: [Text Area]

TRANSPORTER: [Text Area]      TRANSPORT METHOD: [Text Area]      BILL OF LADING: [Text Area]

WORK STATUS: **Received - Completed**      EXCEPTION REASON: [Text Area]      POSTING STATUS: **Posted**

Gross Weight: [Text Area] lbs      START: 08/15/23 Tue 11:08 AM  
 Tare/Out Weight: [Text Area] lbs      END: 01/22/24 Mon 11:51 AM  
 NET WEIGHT: [Text Area] 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: [Text Area]

GROSS QTY	LABELS	NO CHARGE QTY	CHARGE QTY	UOM	CHARGE CODE	PER UNIT	VENDOR RATE	MINIMUM TYPE	MINIMUM	TOTAL
0			0	ton	Trash	\$ 50.00		None		\$ 0.00

Select Print Format [Icon]      **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.

49031 Cascade Nutrition (T4 Cafe)

1234 Balboa Blvd  
Los Angeles, CA 91325-5814

Active

TERMS Due upon receipt

INVOICE DELIVERY Email with Attachment

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.

49031001 Cascade Nutrition (T4 Cafe)

1 of 4

1234 Balboa Blvd  
Los Angeles, CA 91325-5814  
US

Active

NOTE Site Note

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>

Collapsed View of Site

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.



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.

START DATE	START REASON	END DATE	END REASON	QTY	SERVICE CODE	SERVICE ID	PER UNIT	RATE	CONTRACT EXP.
02/02/24 Aliena Somers 01/15/24 6:10 pm	CHG-Contract Renewal Rate Update Batch: 1040 Note: Inflation		CHG-Contract Renewal Created By: Aliena Somers on 01/15/2024 Posted By: Aliena Somers on 01/15/2024 Rate Update Batch: 1040 Rate Update Batch Note: Inflation	1	3 Yard Trash Service 2x per week	EB6E	\$ 103.50	\$ 103.50 each \$/CY: 3.98	
02/02/24 Aliena Somers 01/15/24 6:10 pm	CHG-Price Increase Rate Update Batch: 1040 Note: Inflation		Rate Update Batch Note: Inflation	1	10 Yard Open Top Service On Call	53ED	\$ 93.15	\$ 93.15 each	
02/02/24 Aliena Somers 01/15/24 6:10 pm	CHG-Price Increase Rate Update Batch: 1040 Note: Inflation			1	10 Yard Open Top Service 1x per week	0147	\$ 87.98	\$ 87.98 each \$/CY: 2.03	
02/02/24 Aliena Somers 01/15/24 6:10 pm	CHG-Price Increase Rate Update Batch: 1040 Note: Inflation			1	10 Yard Open Top Service On Call	53ED	\$ 77.63	\$ 77.63 each	

### 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.

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: [ ]

SALES REP: House Acct non System (Hous) | **SOLD BY:** [Open dropdown menu] | FORM CONTACT: [ ] | [Linked Leads \(0\)](#)

TITLE: [ ]

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 | START DATES: [ ] | PRINT EST. WO CHARGES: [ ]

NOTE: [ ]

DELIVERY INSTRUCTION: [ ]

PAYMENT REQUIRED AT CUSTOMER SIGNATURE: Not Required

CUSTOM FIELD1 TEXT: [ ] [ - ]

[ ]

**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

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 SERVICE CODE FREQUENCY PER UNIT SERVICE FEES

Choose one 0.0000 0.00

REQUESTED BY

SERVICE NOTES



Map

Glendale

Los Angeles

Central LA

Keyboard shortcuts

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)**

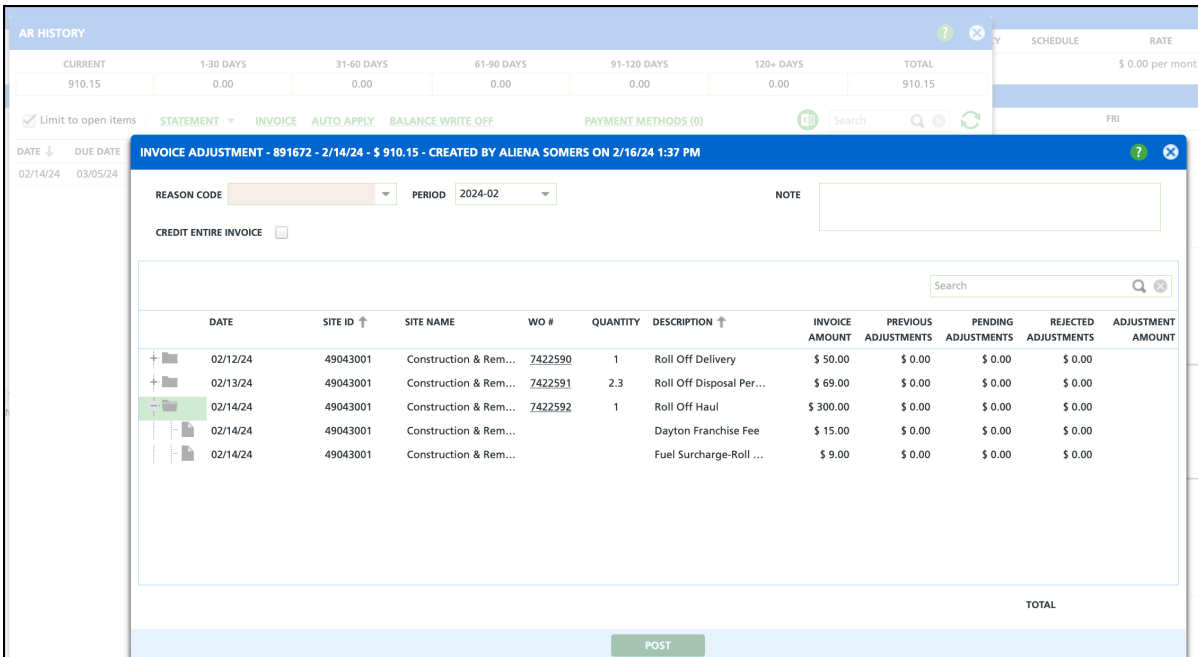
The Reason Code field in the View Change History and Service Additional Fields screens now allows users with permission 392 (Edit Reason Code in Sales Results and History) to edit the code to another of the same type.

The screenshot displays the 'PENDING' section of the Accounts interface. It lists various items with details such as user, date, and time. Below this, the 'ACTIVE SERVICES (5)' section is visible, showing a table of services with columns for QTY, SERVICE CODE, SERVICE ID, FREQUENCY, SCHEDULE, RATE, WO MIN, START DATE, END DATE, and CONTRACT EXP. A right-click menu is open over the '10 Yard Open Top Service' row, with a red arrow pointing to the 'View Change History' option. Another red arrow points to the 'REASON CODE' field in the 'SERVICE ADDITIONAL FIELDS' dialog box, which currently shows 'ADD-Change in LOB/Equip'.

Pathway: Accounts > Customer Service Screen

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

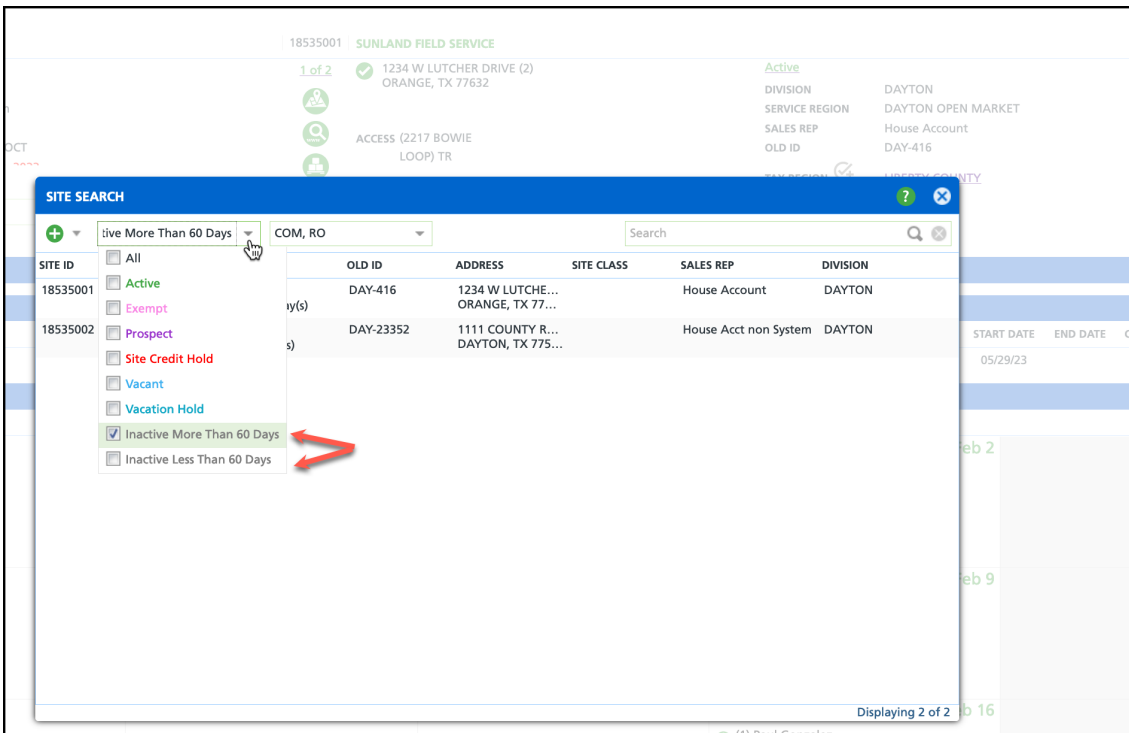
The Invoice Adjustment screen has been updated to order surcharges and taxes by the service or charge code they are attached to.



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.



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)

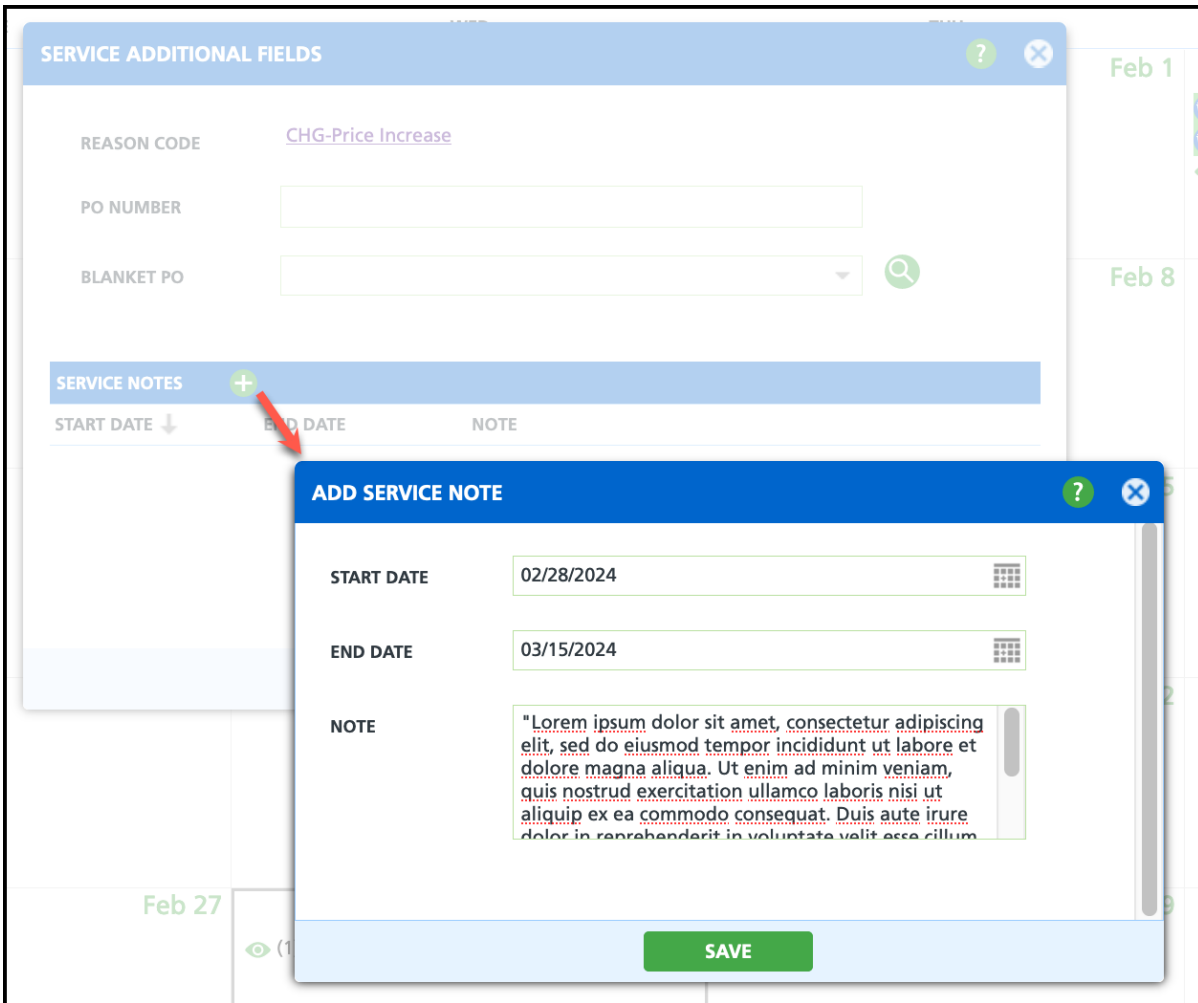
### Active Services (Accounts) - 'Per Unit Rate' Column Added (16392)

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

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

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

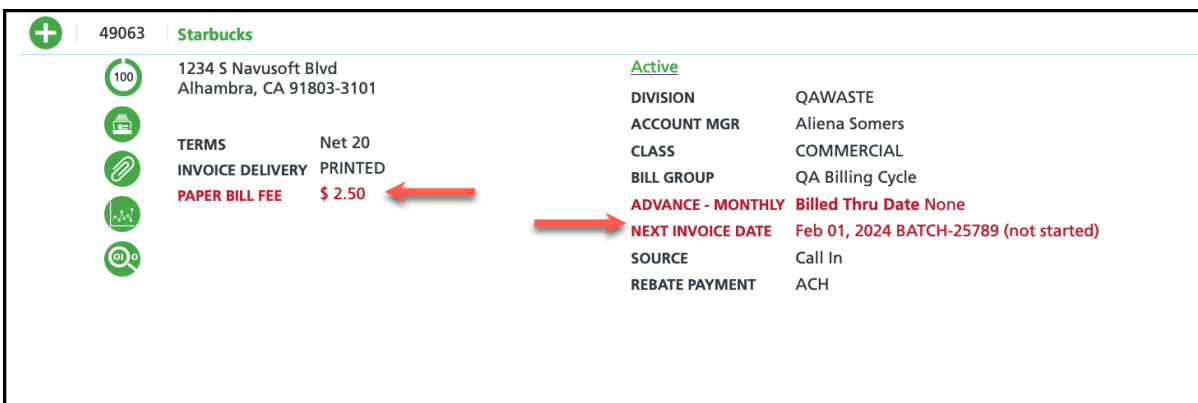
The Services Notes section of the Service Additional Fields screen has been enhanced to open a new, separate 'Add Service Note' editor, which improves the process of adding service notes.



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.



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.

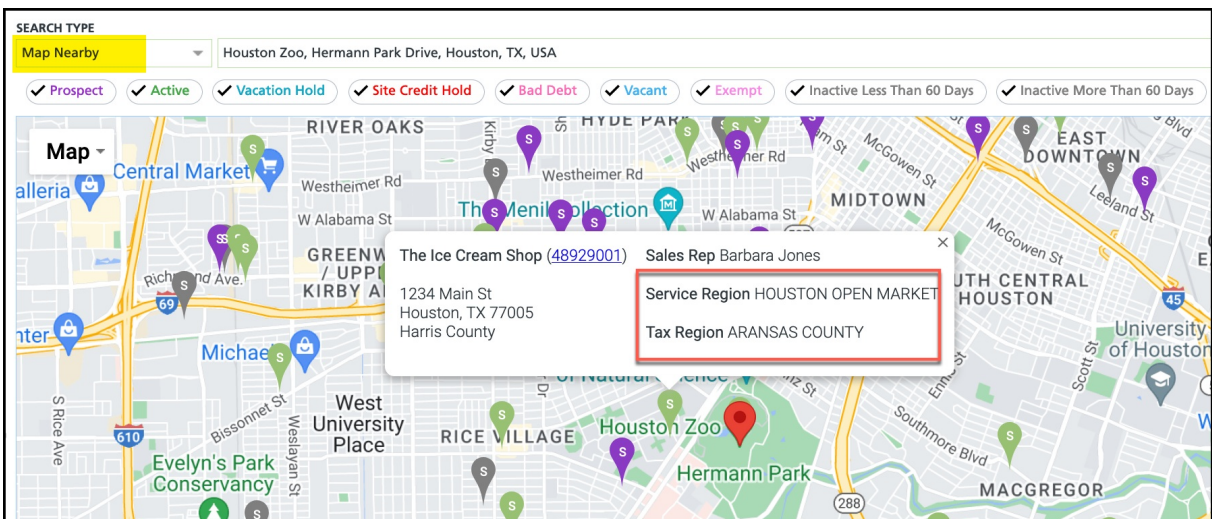
2. The Account / Site column has been improved to include a ' / ' between the account and site.
3. A "Completion Note" column has been added, visible when the Status filter is set to any of the completed options. Additionally, a "Status" column will also be shown after the "Note" column when the Status filter is set to "Not Completed."
4. "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										
DIVISION	ASSIGNED TO	TYPE	STATUS							
All	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

Active

DIVISION DAYTON

ACCOUNT MGR

CLASS COMMERCIAL

BILL GROUP DAY-COMM MONTHLY ADVANCE

ADVANCE - MONTHLY Billed Thru Date Sep 30, 2023

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

1 of 1

TERMS Net 20

INVOICE DELIVERY Printed

CURRENT	1-30	31-60	61-90	91-120	120+	TOTAL
0.00	0.00	0.00	0.00	0.00	508.42	508.42

Auto Pay Not Enabled

HIGHLIGHTS PENDING

Account is significantly past due

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	C73B	On Call		\$ 65.00

CALENDAR March, Fe, M, 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

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
-----------	---------------	------------	-----	-------------	----------	-------------	--------------	---------	-------

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		
<input checked="" type="checkbox"/> 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

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			
Appointment, AR, Cancellation, Complaint, Er							
SUN	MON	TUE	WED				
Feb 25	Feb 26	Feb 27	Feb 28				
Mar 3	Mar 4	Mar 5	Mar 6				
Mar 10	Mar 11	Mar 12	Mar 13 (1 views) - Paul Jones				
Mar 17	Mar 18 1, FL_DELIVER, 2YD, MSW 1, FL_DELIVER, 3YD, MSW 2 Yard Trash Service, ADD-New Business 3 Yard Trash Service, ADD-New Business +23 Events...	Mar 19 (3 views) - 3 Users David Navarro - Last viewed at 9:54 AM Nikita Raiyani - Last viewed at 9:51 AM Paul - Last viewed at 10:25 AM	Mar 20 (1 views) - Paul Jones				
Mar 24	Mar 25	Mar 26	Mar 27				

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.

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](#)

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

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	SEARCH					
Accounts	Example	CORPUS, DAYTON, HILL	COMMERCIAL	Annual Billing	SEARCH				
<input checked="" type="checkbox"/> Prospect	<input checked="" type="checkbox"/> Active	<input checked="" type="checkbox"/> Credit Hold	<input checked="" type="checkbox"/> Bad Debt	<input checked="" type="checkbox"/> 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.

**SERVICE CODE DEFAULT RATE SETUP** SETUP > SERVICES > DEFAULT PRICING > SERVICE CODE

+ LOB **Commercial** EQUIPMENT **2 Yard FL** DIVISION **QAWASTE** SERVICE REGION **QA Service Region 2** **LOAD** HIDE EXPIRED PRICING

SERVICE CODE	DESCRIPTION	SERVICE REGION	EQUIPMENT TYPE	MATERIAL TYPE	FREQUENCY	FIRST ITEM	ADDITIONAL QUANTITY	RATE UOM	EFFECTIVE DATE
FL02T	2 Yard Trash Service	QA Service Regi...	2 Yard FL	MSW	1x per week	126.00	62.00	month	03/01/24
FL02T	2 Yard Trash Service	QA Service Regi...	2 Yard FL	MSW	1x per week	131.00	67.00	month	04/01/24

**EDIT SERVICE CODE DEFAULT RATE**

SERVICE CODE: **2 Yard Trash Service**

DIVISION: **QAWASTE**

SERVICE REGION: **QA Service Region 2**

FREQUENCY: **1x per week**

FIRST ITEM RATE: **126.00**

ADDITIONAL QUANTITY RATE: **62.00**

EFFECTIVE DATE: **03/01/2024**

**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 month

SERVICE DAYS:  Mon  Tue  Wed  Thu  Fri  Sat  Sun

REQUESTED BY:

SERVICE NOTES:

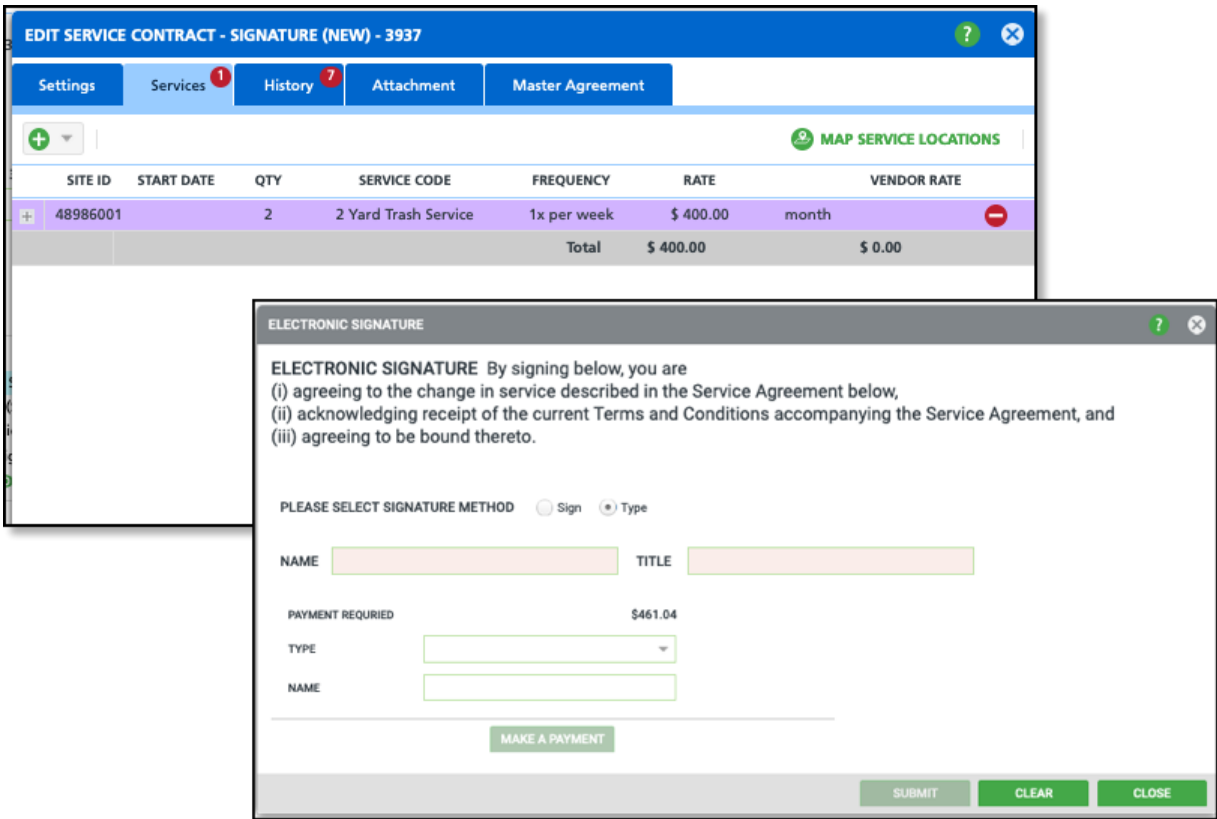
FL Delivery ROUTE:  DATE: **03/27/24 Wednesda**

WORK ORDER NOTES:

Pathway: Setup > Services > Default Pricing > Service Code

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

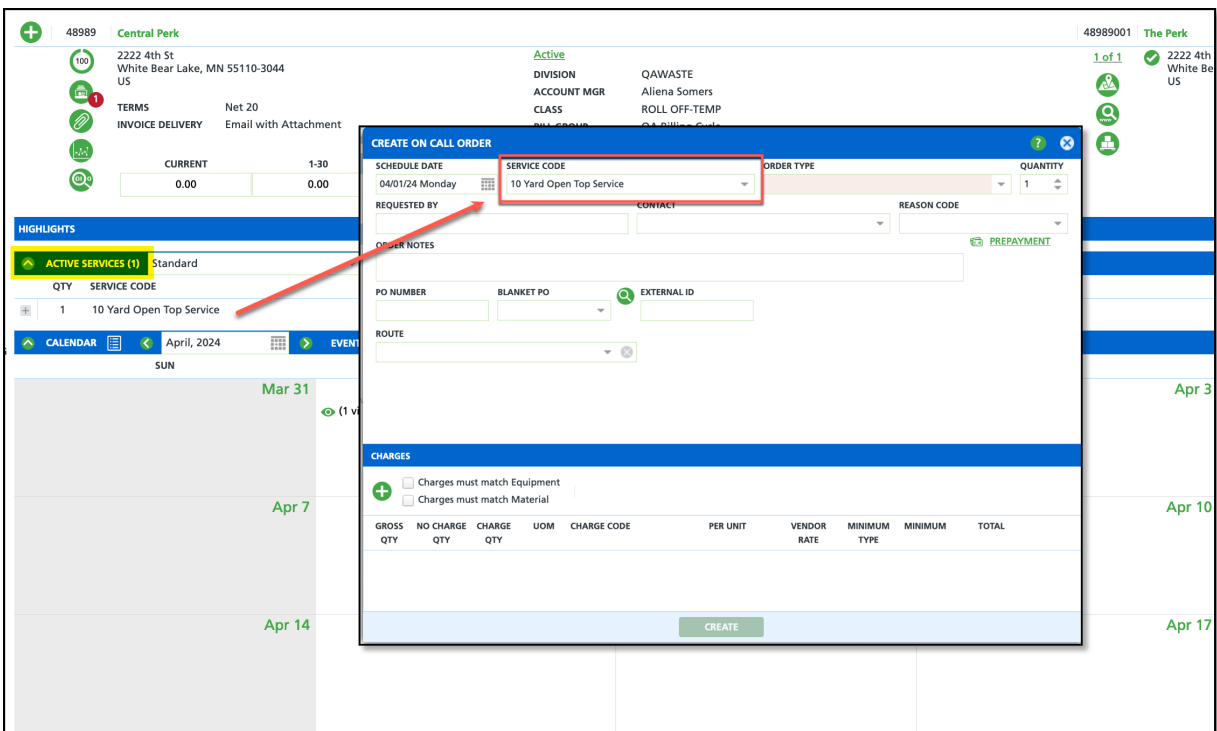
The logic for the "Payment Required" calculation in the Electronic Signature screen has been updated for both scenarios: calculating recurring services without taxes and surcharges, and calculating recurring services with taxes and surcharges. In both cases, the calculation will utilize the rate rather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



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.



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	527.93

**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>							527.93

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

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' field is set to 'Aliena Somers'. A modal window titled 'PERMISSION SETUP' is open, showing a list of permissions for the 'Accounts' module. The permissions are as follows:

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 several filter buttons: 'Prospect', 'Active', 'Credit Hold', 'Bad Debt', and 'Inactive'. The search results table is currently empty.

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: | PREPAYMENT

ORDER NOTES:

PO NUMBER: | BLANKET PO: | EXTERNAL ID: | 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	EQUIPMENT	SERVICE CODE	FREQUENCY	PER UNIT	SERVICE FEES
1	30 Yard Open Top	Yard Open Top Service - C&D		0.0000	0.00 month

EQUIPMENT OWNERSHIP: Choose one

REQUESTED BY: | SERVICE NOTES: | ROUTE: | DATE: 04/22/24 Monday

WORK ORDER NOTES: | DEFAULT DESTINATION: LALANDFILL - 18 miles (32m)

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

Map: Los Angeles area with various locations marked.

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.

**SALES RESULTS NET NEW**

RANGE: Period | PERIOD: Jan 2024 | BASED ON: Effective Date | DIVISION: All | LINE OF BUSINESS: All

GROUP BY: Sales Rep

SALES REP	NEW
Aliena Somers	\$ 0.00 0 (0 Sites)
Chris Fairchild	\$ 325.00 1 (1 Sites)
Dave Pike	\$ 100.00 1 (1 Sites)
House Account	\$ 320.00 4 (3 Sites)
House Acct non System	\$ 0.00 1 (1 Sites)

**SALES RESULT DETAILS**

Aliena Somers - New

DIVISION	LINE OF BUSINESS	SOURCE	REASON CODE	RATE UPDATE BATCH	SERVICE REGION	ACCOUNT CLASS	EQUIPMENT TYPE	SITE ID	SITE	START DATE	POSTED DATE	RATE	1085
CORPUS	Document Destruct...	Call In	ADD-Add Svc - New Service		CORPUS OPEN MARKET	RESIDE...		490...	NR- 21719	01/0...	01/0...	\$ 0.00	N/A
QAWASTE	Comme...		ADD-Add Svc - New Service		QA Service Region 2	COMME...	2 Yard FL	431...	BJ'S Restaur...	01/0...	01/2...	\$ 18...	N/A

## Rate History

Pathway: Accounts > Customer Service Screen > Active Services Section

Start/End Reason columns have been added to the Rate History screen in replacement of the Reason Code column. If the user has permission 392 (Edit Reason Code in Sales Results Net New and Rate History), the reason code can be edited to another reason code of the same type.

49031 Cascade Nutrition (T4 Cafe) | 49031001 Cascade Nutrition (T4 Cafe)

1234 Balboa Blvd Los Angeles, CA 91325-5814 | 1234 Balboa Blvd Los Angeles, CA 91325-5814 US

TERMS: Due upon receipt | INVOICE DELIVERY: Email with Attachment

ADVANCE - MONTHLY Billed Thru Date Jan 31, 2024

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

**HIGHLIGHTS** | **PENDING**

ACTIVE SERVICES (2) | Standard | TOTAL RECURRING \$ 120.00

QTY	SERVICE CODE	SERVICE ID	FREQUENCY	SCHEDULE
1			week	M
1			week	T

**RATE HISTORY**

START DATE	START REASON	END DATE	END REASON	QTY	SERVICE CODE	SERVICE ID	PER UNIT	RATE	CONTRACT EXP.	THU
01/26/24	ADD-New Business			1	2 Yard Recycle Service	7613	\$ 20.00	\$ 20.00 each \$/CY: 2.31		
01/27/24 12:03 am										
01/25/24	ADD-New Business							\$ 100.00 each \$/CY: 11.55		
01/25/24 7:29 pm										

**CHOOSE NEW ADD REASON CODE**

- ADD-Add Svc - New Service
- ADD-Add Svc by System
- ADD-Change in LOB/Equip
- ADD-New Bus-Acquisition
- ADD-New Bus-From Competitor
- ADD-New Bus-New Owner
- ADD-New Bus-SEO Wed Inquiry
- ADD-New Business
- ADD-New Business-Temp
- ADD-Reinstate-Bad Debt Cust

## Rate Update Batch (Sales) - Screen Updates (16332)

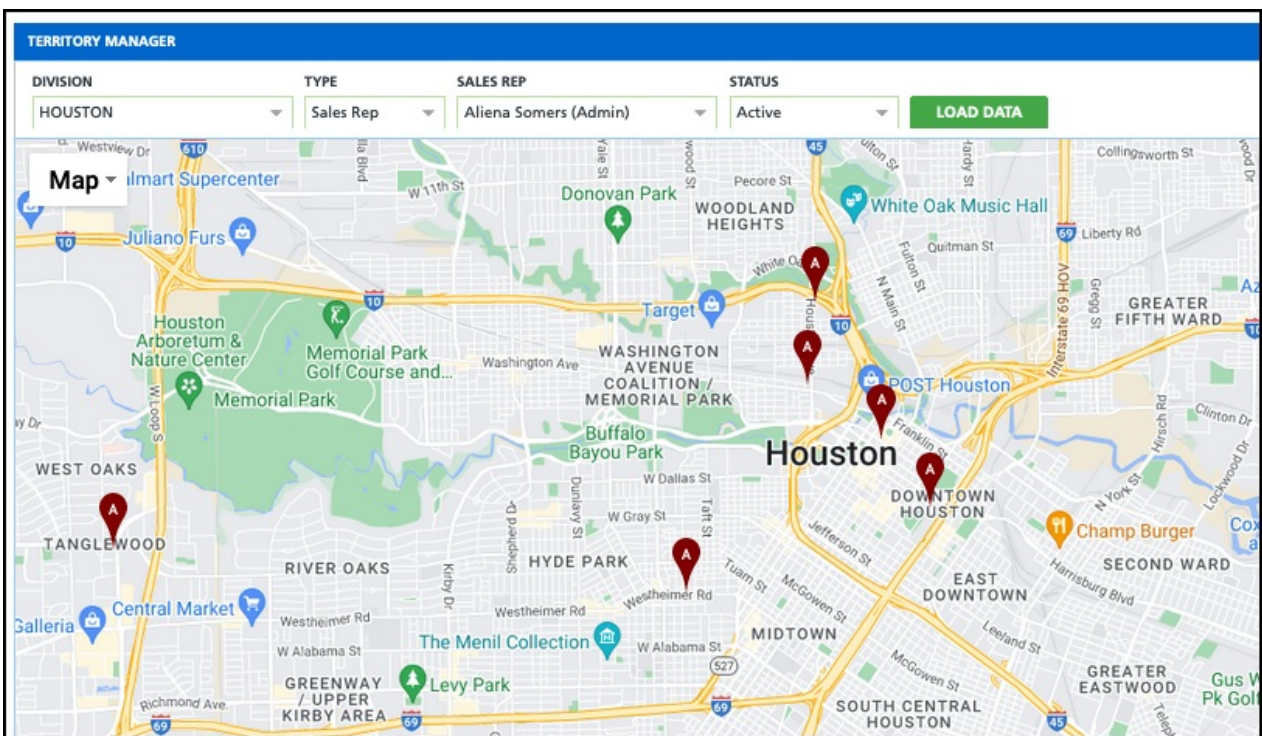
The Site Service Rate Update Batch screen has been enhanced to now include a Quantity (QTY) field and a Service Frequency field within the Extended Grid View.

SITE SERVICE RATE UPDATE BATCH: 1045									
GRID VIEW	CHANGE TYPE	AMOUNT			APPLY	NET VARIANCE	AMOUNT	EFFECTIVE DATE	SEARCH
Extended	Amount	10.00				\$0.00		02/23/2024	
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** 😊 ⏪ ⏩

**S**  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 message

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

EXPORT 298 records / 285 selected / 298 visible CLOSE

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		LOB		
HOUSTON	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									
LOCATION		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	Method: Truck	HOMEBASE	Method: Truck	Manifest Consolidation Transfer	MSW	Outbound Gross: 2.3 tons Outbound Tare: 1.3 tons Outbound 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.

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 1234 WAGON TRAIL, PEARLAND	Thu 2/29/24	1/15/24 3:55am	7286341	Scheduled Service COMPLETED 10:46 am	FL Service	2	8 Yard FL	

	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

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.

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.

Houston Open Market - Commercial - Monday, Tuesday, Wednesday									
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		Post Posted 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		Post 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		Post
							206	0	Posted
							HOU 202	0	Posted
							OTHERS	0	Posted
							HOU 201	0	Posted
							HOU 203	0	Posted
							HOU 204	0	Posted
							HOU 205R	0	Posted
							HOU 206	0	Posted
							HOU DUMPSTER DEL/REM	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					Post
46536001	1234 Washington Road	1	2 YD No Work Class	1x per week					Post

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	TO	DIVISION	LINE OF BUSINESS						
03/12/24	03/12/24	QAWASTE	Commercial						
Standard   Select Route Sheet									
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				1	0	1 (100%)	<a href="#">View Optimization Res...</a>
		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: 03/01/24 TO: 03/14/24 DIVISION: QAWASTE, HOUSTON, DAYTON, CORPUS LINE OF BUSINESS: Commercial, Roll Off, Miscellaneous

Route Productivity

ROUTE	DRIVER	PAYROLL CLOCK IN	LOG IN	PRE TRIP	FIRST SERVICE TIME	LUNCH START	LUNCH END	LAST SERVICE TIME	TRUCK / ODOMETER	FUEL	POST TRIP	LOG OUT	PAYROLL CLOCK OUT
ALVARO	Dave Pike - Support Analyst (Not Available)	?							Alvaro / 0	0		?	
CORPUS - Roll Off - Monday Mar 11, 2024 ( 0 of 1 Completed)													
ALVARO	Dave Pike - Support Analyst (Not Available)	?							Alvaro / 0	0		?	
CORPUS - Roll Off - Tuesday Mar 12, 2024 ( 0 of 1 Completed)													
ALVARO	Dave Pike - Support Analyst (Not Available)	?							Alvaro / 0	0		?	
CORPUS - Roll Off - Wednesday Mar 13, 2024 ( 0 of 1 Completed)													
ALVARO	Dave Pike - Support Analyst (Not Available)	?							Alvaro / 0	0		?	
CORPUS - Roll Off - Thursday Mar 14, 2024 ( 0 of 1 Completed)													
ALVARO	Dave Pike - Support Analyst (Not Available)	?							Alvaro / 0	0		?	
DAYTON - Commercial - Friday Mar 1, 2024 ( 0 of 6 Completed)													
DAY CO SUB OUT													
DAY 205													
DAY 204													
DAY 203													
DAY 202													
DAY 201													
DAYTON - Commercial - Saturday Mar 2, 2024 ( 0 of 3 Completed)													
DAY CO SUB OUT													
DAY 202													
DAY 201													
DAYTON - Commercial - Sunday Mar 3, 2024 ( 0 of 1 Completed)													
DAY CO SUB OUT													
DAYTON - Commercial - Monday Mar 4, 2024 ( 0 of 4 Completed)													

**FUEL RECORD**

TRUCK	FUEL SOURCE	FUEL TYPE	VOLUME	UOM	COST	ATTACHMENT	NOTE	DATE	CREATED BY	CREATED ON	View
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

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, Wed    **LOAD**

51 records

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	Home Goods 1132 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	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:

**Legend**

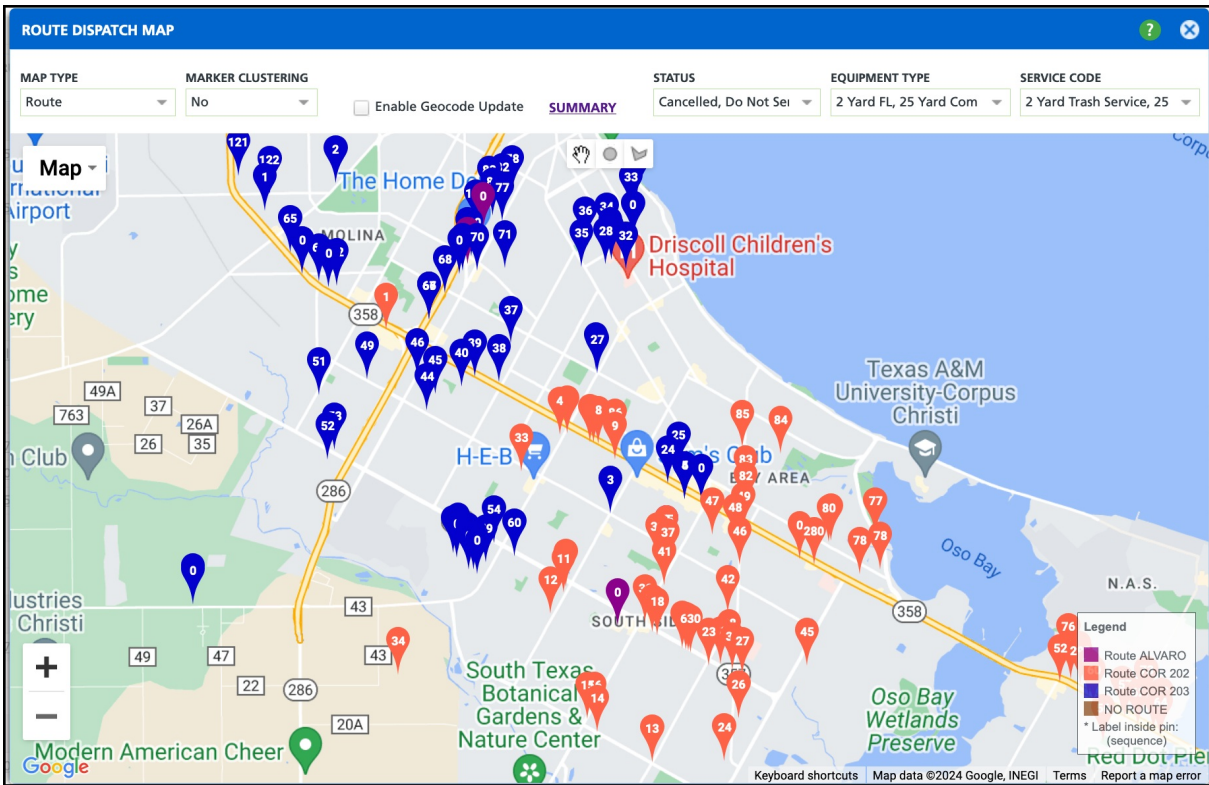
- Route HOU 204 - Wed 96
- Route HOU 204 - Fri 102
- Route HOU 204 - Thu 87
- Route HOU 204 - Tue 100
- Route HOU 205R - Thu 17
- Route HOU 203 - Thu 84
- Route HOU 203 - Wed 95
- Route HOU 203 - Tue 97
- Route HOU 203 - Fri 97
- Route HOU 202 - Thu 6
- Route HOU 202 - Tue 1
- Route HOU 202 - Wed 5
-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

\* Label inside pin: (Sequence)

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 to 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		CORPUS, DAYTON, HILLSBORO, HOUSTON, QAWASTE		SUMMARY BY		GROUP BY		FROM		TO		
				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												
NAVU_HOU_MRF												
Total												

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		ACCOUNT CLASS		BILL GROUP		AUDITOR		Search					
All		All		All		All							
<input checked="" type="checkbox"/>	Payment	\$ -227,691.97		<input checked="" type="checkbox"/>	Deposit	\$ -668.99		<input checked="" type="checkbox"/>	Adjustments	\$ -1,176.26			
								Total Count:	1,141	Unapplied:	\$ -229,537.22		
DATE	TYPE	ACCOUNT	AM...	APPL...	UNA...	DEPOSIT	CURRENT	1-30	31-60	61-90	91-120	OVER 120	TOTAL
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)

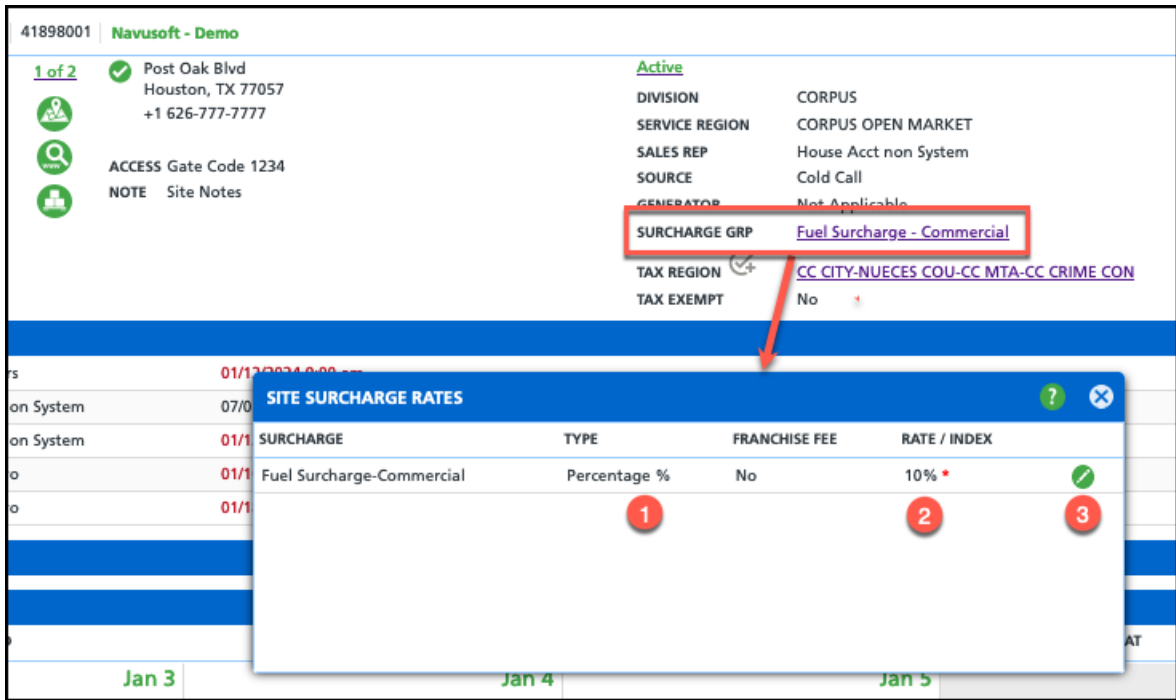
#### Site Surcharge

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.

- Upon hovering the mouse over the rate, a tooltip with information on the base rate and override information will display.
- c. An action button has been added that will open the Site Surcharge Rates.
- This button is only visible if the user has permission 451 (Add or Edit - Override Account of Site Surcharge Rates).



### \*New\* Surcharge Management

**Pathway:** Accounting > Surcharge Management

A new Surcharge Management screen has been created and is available in the Accounting module. This screen is used to oversee and regulate surcharges applied to accounts and their sites. Within this screen, 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.

The Surcharge Management screen requires the user to have the following permissions:

- 452 - Surcharge Rate Management

For more information on how to use the screen, review the [Surcharge Management](#) article.

SURCHARGE MANAGEMENT										ACCOUNTING > SURCHARGE MANAGEMENT				
DIVISION	SERVICE REGION	SURCHARGE GROUP		SURCHARGE						ESTIMATED REVENUE				
QAWASTE	QA Service Region 2, QA Was	All	All							RECURRING	BASE RATE	CURRENT RATE	VARIANCE	
<input checked="" type="checkbox"/> Has Active Services <input checked="" type="checkbox"/> Surcharge Rate Overridden <input type="button" value="LOAD"/> <input type="text" value="Search"/>														
ACCOUNT	SITE	SITE STATUS	SALES REP	SURCHARGE GROUP	SURCHARGE	TYPE	BASE RATE	CURRENT RATE	EFFECTIVE DATE	TOTALS				
										8	\$ 825.00	\$ 59.00	\$ 52.05	\$ (6.95)
AJ's RESTAUR...	AJ's Restaurant	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...	Cafe 5	Active	House Account	MULTIPLE FEES	Fuel Surcharge	Percentage %	10%	12/31/2023		\$ 120.00	\$ 12.00	\$ 4.80	\$ (7.20)	
Encanto Restá...	Encanto Resta...	Active	Aliena Somers	MULTIPLE FEES	Fuel Surcharge	Percentage %	10%	12/31/2023		\$ 100.00	\$ 10.00	\$ 8.00	\$ (2.00)	
Encanto Restá...	Encanto Resta...	Active	Aliena Somers	MULTIPLE FEES	Environmental Surcharge	Percentage %	5%	12/31/2023		\$ 100.00	\$ 5.00	\$ 3.00	\$ (2.00)	
Jack in the Box	Jack in the Box	Active	House Account	Fuel Surcharge	Fuel Surcharge	Percentage %	10%	12/31/2023		\$ 100.00	\$ 0.00	\$ 0.00	\$ 0.00	
Bubble Tea (T...	Bubble Tea (T...	Active	House Account	MULTIPLE FEES	Fuel Surcharge	Percentage %	10%	12/31/2023		\$ 120.00	\$ 12.00	\$ 3.60	\$ (8.40)	
Holiday Cafe ...	Holiday Cafe ...	Active	House Account	MULTIPLE FEES	Fuel Surcharge	Percentage %	10%	12/31/2023		\$ 100.00	\$ 10.00	\$ 8.00	\$ (2.00)	
Cascade Nutri...	Cascade Nutri...	Active	House Account	MULTIPLE FEES	Fuel Surcharge	Percentage %	10%	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.

Account: 49046 Subway Fountain Valley (Active) | 49046001 Subway Fountain Valley (1 of 1)

Address: 1234 Brookhurst St, Fountain Valley, CA 92708-6750

Account MGR: Paul | Division: QAWASTE | Class: COMMERCIAL | Bill Group: OA Billino Cycle

Terms: Due upon receipt | Invoice Delivery: PRINTED

Auto Pay Not Enabled

	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

HIGHLIGHTS: Account is significantly past due | PENDING

AR AGING MANAGEMENT FILTERS: DIVISION: QAWASTE, TYPE: AR Aging By Past Due Date, ACCOUNT CLASS: COMMERCIAL, TERM: All, BILL GROUP: QA Billing Cycle

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

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.

AR PAYMENT BATCH

PERIOD: Feb 2024 | DIVISION: Select Division | BANK ACCOUNT: All

BATCH # | DIVISION

CREATE PAYMENT BATCH

DIVISION: Select Division

DATE: [Calendar Icon]

PERIOD: [Calendar Icon]

BANK ACCOUNT: Select Bank Account

NOTE: [Text Area]

SAVE

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

TYPE	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** ACCOUNTING > CREDIT CARD EXPIRATION

DIVISION: All | BILL GROUP: All | AUTO PAY: All | HAS ACTIVE SERVICES: All | EXPIRATION: 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: Feb 2024 | DIVISION: HOUSTON | BANK ACCOUNT: All Open 1 \$ 0.00 | Voided 0 \$ 0.00

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.

The screenshot displays the 'BATCH - 11242 DIVISION - HOUSTON' interface. At the top, it shows the date (03/05/2024), bank account (COMERICA - FWS), amount (\$ 4,308.65), count (2), and status (Posted). A note is visible: 'This note was added to the payment record'. Below this is a search bar and a 'DEFAULT PAYMENT TYPE' dropdown. The main table lists accounts with columns for ACCOUNT ID, STATUS, BALANCE, ACCOUNT NAME, SITE ID, SITE NAME, and PREVIOUS ID. A 'SORT' dropdown menu is open, showing options like 'Entry Order ↓', 'Account # ↓', 'Name ↓', 'Status ↓', 'Balance ↓', and 'Type ↓'. A dialog box titled 'NOTE' is open, containing the text 'Notes added here will export to Excel' and a 'SAVE' button. A red arrow points from the dialog box to the 'Apply' button in the table row for account 43200. At the bottom, there are buttons for 'UN-POST', 'PRINT REPORT', 'VOID', and '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>		

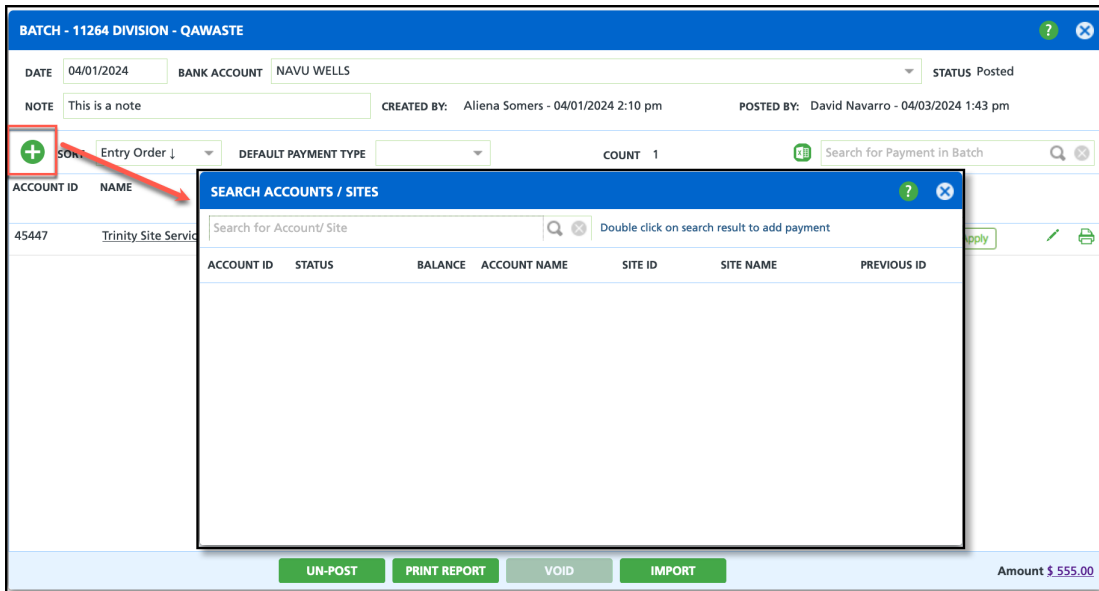
Pathway: Setup > System > Notification Template > Credit Card Expiration (Type)

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

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

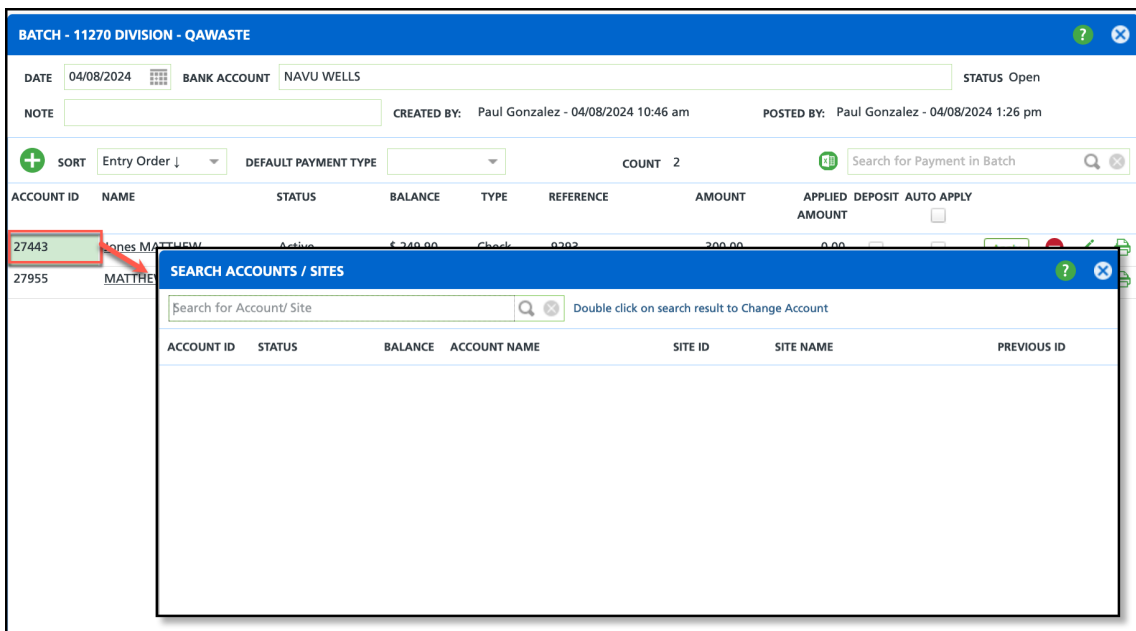
#### Search and Add Accounts/Sites

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.



### 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.



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.

**GL SETUP ERRORS**

RECORD ID	NAME	AR ACTIVITY COUNT	SETUP WARNING
HAZ	Hazardous Material	1	*** Line of business is missing gl segment
MEDICAL	Medical Waste	1	*** Line of business is missing gl segment
SCALE	Scale	1	*** Line of business is missing gl segment

**UPDATE LINE OF BUSINESS**

LOB ID: HAZ  
 NAME: Hazardous Material ACTIVE: Yes

Settings | Mobile | Optimization | Self-Service Ordering | Profitability

SCREEN TYPE	1	ENABLE USED OIL COLLECTION	No
GL SEGMENT		ENABLE PROACTIVE ROUTE STATUS DRIVER CHECK	No
UNEARNED REVENUE GL ACCOUNT	Unearned Revenue	ENABLE MANIFEST PROCESSING	No
WORK ORDER MINIMUM CHARGE CODE		ENABLE MANIFEST GROUP WEIGHT ROUNDING	Yes
OVER MAX WEIGHT CHARGE CODE		ENABLE ACTIVE DISPATCH	No
RENTAL CHARGE CODE		ENABLE CHARGE CODE WASTE CODES	Yes
RECURRING MINIMUM CHARGE CODE		ENABLE WORK TYPE DEFAULT CHARGE CODES	No
LIMIT CHARGE CODE TO MATCHING EQUIPMENT	No	ENABLE BIC REPORTING	No
LIMIT CHARGE CODE TO MATCHING MATERIAL	No	ENABLE LABOR TRACKING	No
INVOICE SUMMARY DESCRIPTION			
PRODUCTIVITY UNIT NAME			

Pathway: Accounting > GL Transaction Processing

### Invoice Adjustment Pending Approval and History - Logic Updated to the Recalculation of Taxes and Surcharges (16550)

An enhancement has been made to the Invoice Adjustment screen to recalculate the taxes and surcharges and when a credit is applied to the parent charge.

**INVOICE ADJUSTMENT - 856406 - 12/1/22 - \$ 120.46 - CREATED BY DAVID NAVARRO ON 10/4/23 12:42 PM**

REASON CODE: Incorrect Price PERIOD: 2023-10 NOTE: test 3

CREDIT ENTIRE INVOICE

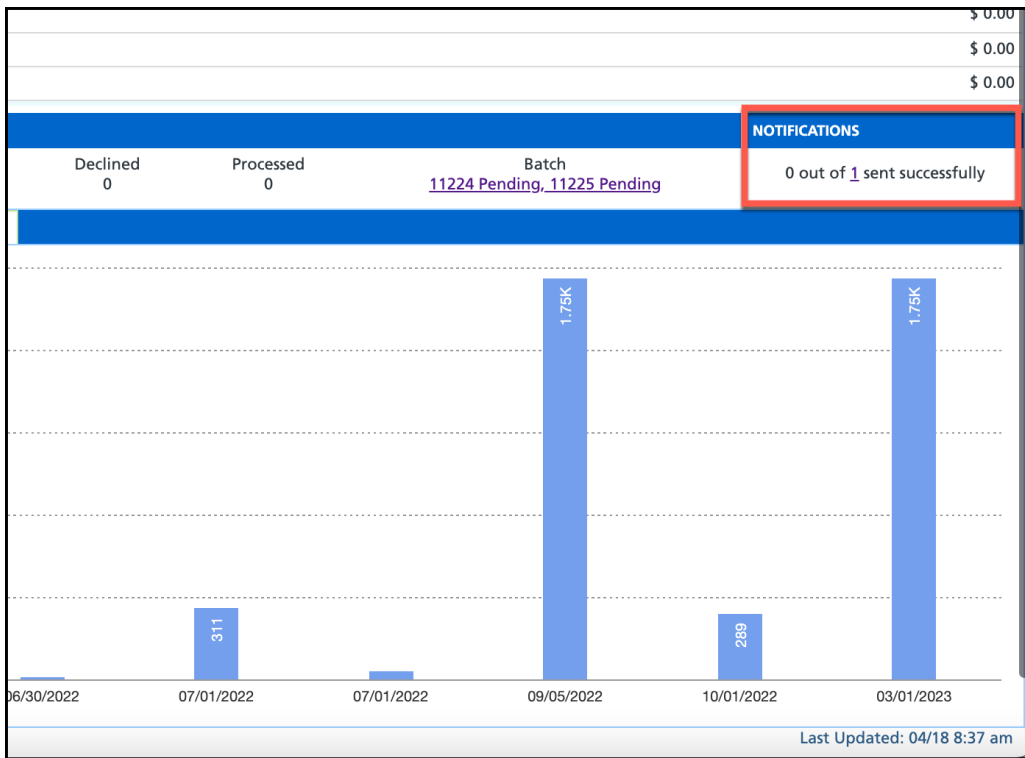
DATE	SITE ID ↑	SITE NAME	WO #	QUANTITY	DESCRIPTION ↑	INVOICE AMOUNT	PREVIOUS ADJUSTMENTS	PENDING ADJUSTMENTS	REJECTED ADJUSTMENT	ADJUSTMENT AMOUNT
12/01/22 - 12/31/22	47452001	Charlie Castenada		1	2 Yard Trash Service	\$ 95.00	\$(2.50)	\$ 0.00	\$ 0.00	-\$3
12/01/22	47452001	Charlie Castenada			Fuel Surcharge-Resi...	\$ 17.30	\$(1.18)	\$ 0.00	\$ 0.00	\$(6.28)
12/01/22	47452001	Charlie Castenada			ARANSAS CO HEALT...	\$ 0.48	\$(0.24)	\$ 0.00	\$ 0.00	\$(0.24)
12/01/22	47452001	Charlie Castenada			ARANSAS COUNTY	\$ 0.48	\$ 0.00	\$ 0.00	\$ 0.00	\$(0.16)
12/01/22	47452001	Charlie Castenada			TEXAS STATE	\$ 5.94	\$(0.06)	\$ 0.00	\$ 0.00	\$(2.04)
<b>TOTAL</b>										<b>\$(41.72)</b>

**POST**

Pathway: Accounting > Invoice Adjustment Pending Approval and History

### 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.

The screenshot shows the AR Analysis interface. The top section is a summary table with columns for months (JAN to DEC) and a TOTAL column. The bottom section is a detailed view titled 'AR ANALYSIS DETAILS - RECURRING SERVICES - MAR', which lists individual invoices with columns for DIVISION, ACCOUNT ID, ACCOUNT NAME, SITE ID, SITE NAME, TYPE, INVOICE #, DATE, AMOUNT, and CODE.

	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	5,619.27										
Taxes	7,620.70	18,037.07	12,847.24										
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										
<b>Total</b>	<b>1,727,649.54</b>	<b>2,003,235.23</b>	<b>2,226,959.94</b>										

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.

The screenshot shows a Service History report for Account ID 49020. The table lists work orders with columns for SCHEDULED WO #, TYPE, WORKFLOW, WO CHARGES, GROSS QTY, NO CHARGE QTY, QTY, RATE, and AMOUNT. A red box highlights the GROSS QTY and NO CHARGE QTY columns.

SCHEDULED WO #	TYPE	WORKFLOW	WO CHARGES	GROSS QTY	NO CHARGE QTY	QTY	RATE	AMOUNT
<b>Account Id 49020 Friendly Inn</b>								
<b>49020001 2146 San Gabriel Blvd Rosemead, CA91770-3642</b>								
12/22/23	7140640	On Call	RO_SWAP	ROHAUL	1.00	0.00	1.00	0.00
12/22/23	7140640	On Call	RO_SWAP	ROLFTONS	3.50	1.20	2.30	35.00
<b>Total</b>				<b>4.50</b>	<b>1.20</b>	<b>3.30</b>	<b>\$ 35.00</b>	<b>\$ 80.50</b>
<b>Grand Total</b>				<b>4.50</b>	<b>1.20</b>	<b>3.30</b>	<b>\$ 35.00</b>	<b>\$ 80.50</b>

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	<input type="text" value=""/>
Period To *	<input type="checkbox"/> All
Tax	<input checked="" type="checkbox"/> Example <input type="checkbox"/> -- DAYTON <input type="checkbox"/> -- QAWASTE <input type="checkbox"/> CORPUS <input type="checkbox"/> HILLSBORO <input type="checkbox"/> 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					SALES RESULT DETAILS		SALES RESULT	
Period	Apr 2024	Effective Date		All	All								
GROUP BY: Sales Rep													
	NEW	INCREASES	GROSS TOTAL	CONTROLLABLE	NON-CONTROLLABLE	DECREASES	NET TOTAL	TEMP / SEASONAL	1085				
	\$ 90.00 1 (1 Sites)	\$ 0.00 0 (0 Sites)	\$ 90.00	\$ (90.00) 1	\$ 0.00 0	\$ 0.00 0 (0 Sites)	\$ 0.00	\$ 0.00 0 (0 Sites)	0%				
David Norman	\$ 0.00 1 (1 Sites)	\$ 0.00 0 (0 Sites)	\$ 0.00	\$ 0.00 0	\$ 0.00 0	\$ 0.00 0 (0 Sites)	\$ 0.00	\$ 0.00 0 (0 Sites)	N/A				
Allena Santos	\$ 0.00 0 (0 Sites)	\$ 0.00 0 (0 Sites)	\$ 0.00	\$ 0.00 0	\$ 0.00 0	\$ 0.00 0 (0 Sites)	\$ 0.00	\$ 0.00 1 (1 Sites)	N/A				
Dave Peters	\$ 50.00 1 (1 Sites)	\$ 0.00 0 (0 Sites)	\$ 50.00	\$ 0.00 0	\$ (450.00) 1	\$ 0.00 0 (0 Sites)	\$ (400.00)	\$ 0.00 0 (0 Sites)	0%				
House Account	\$ 0.00 2 (1 Sites)	\$ 37.61 8 (3 Sites)	\$ 37.61	\$ 0.00 0	\$ 0.00 0	\$ 0.00 0 (0 Sites)	\$ 37.61	\$ 0.00 0 (0 Sites)	7.7014%				
House Acct non System	\$ 0.00 1 (1 Sites)	\$ 85.00	\$ 85.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 85.00	\$ 0.00	N/A				
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)												
<b>Total</b>	\$ 140.00 6												

SALES RESULT DETAILS													
House Account - New													
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**

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**

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 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	

PERMISSION NAME	PERMISSION ID	AUTHORIZATION STATUS
Accounting		
Accounts		
Dashboard		
Database		
Help		
Operations		
Active Dispatch	389	Authorized
Add charge code to work order	334	New
Add manual label to work order	299	Authorized
Add/Edit account Safety Profile	408	Not Authorized
Adjust Site Inventory	222	Authorized
Adjust Tank Inventory	172	Not Authorized
Adjust Yard Inventory	220	Authorized
Approve work order label exception	317	Not Authorized
Assignable as a Mechanic	237	Not Authorized
Assignable as a route Driver	305	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	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%	

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							
ID	NAME	LINE OF BUSINESS	EQUIPMENT TYPE	MATERIAL TYPE	UOM	IS TAXABLE	TAXABLE CLASS
FL10R	10 Yard Recycle Service43	Commercial	10 Yard FL (Ser)	Recycle	month	Yes	Service
FL10T							
FL02R							
FL02T							

CHARGE CODE SETUP							
ID	NAME	LINE OF BUSINESS	EQUIPMENT TYPE	MATERIAL TYPE	RATE UOM	IS TAXABLE	TAXABLE CLASS
ADJ-RO	Adjustment-Roll Off	Roll Off			each	Yes	
CCMSWTON	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** SETUP > SERVICES > SURCHARGE GROUP

1 2

Search

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

3

Surcharges

+

4

NAME ↑	
Dayton Franchise Fee	-
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. a. i. An Excel Export button was added.
- ii. A Search option has been added.

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

1. a. i. 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.

- ii. The Tax Rate ID and Tax Region columns have been removed.

TAX REGION SETUP					SETUP > ACCOUNTING > TAX REGION																																																																												
<div style="display: flex; justify-content: space-between; align-items: center;"> <span>+</span> <span>1</span> <span>2</span> <span>3</span> </div> <div style="text-align: right; margin-bottom: 5px;"> <input type="text" value="Search"/> <span>Q</span> <span>X</span> <span>↺</span> </div> <table border="1"> <thead> <tr> <th>TAX REGION ID</th> <th>NAME</th> <th>MAP AREA</th> <th>ERP LABEL</th> <th>ACTIVE</th> </tr> </thead> <tbody> <tr><td>1000</td><td>AUSTIN CITY-MTA-ETGW</td><td></td><td>12345</td><td>Yes</td></tr> <tr><td>1001</td><td>BLANCO ESD 1 BSLD</td><td></td><td>12345</td><td>Yes</td></tr> <tr><td>1002</td><td>BLANCO CO ESD 2 BSLD</td><td></td><td></td><td>Yes</td></tr> <tr><td>1003</td><td>COMAL CO ESD 7</td><td></td><td></td><td>Yes</td></tr> <tr><td>1004</td><td>CALDWELL COUNTY</td><td></td><td></td><td>Yes</td></tr> <tr><td>1005</td><td>CALDWELL CO ESD 1-A</td><td></td><td></td><td>Yes</td></tr> <tr><td>1006</td><td>CALDWELL CO ESD 2</td><td></td><td></td><td>Yes</td></tr> <tr><td>1007</td><td>CALDWELL-HAYS ESD 1A</td><td></td><td></td><td>Yes</td></tr> <tr><td>1008</td><td>COMAL CO ESD 6</td><td></td><td></td><td>Yes</td></tr> <tr><td>1009</td><td>AUS-COMAL ESD 3 CLLD</td><td></td><td></td><td>Yes</td></tr> <tr><td>1010</td><td>COMAL CO ESD 4 CLLD</td><td></td><td></td><td>Yes</td></tr> <tr><td>1011</td><td>DRIPPING SPRNGS CITY</td><td></td><td></td><td>Yes</td></tr> <tr><td>1012</td><td>FAYETTE COUNTY</td><td></td><td></td><td>Yes</td></tr> <tr><td>1013</td><td>GONZALES COUNTY</td><td></td><td></td><td>Yes</td></tr> </tbody> </table>							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
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## Tax Setup

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

1. a. An Excel Export button was added.
- b. A Search option has been added.

TAX SETUP									SETUP > ACCOUNTING > TAX																																																																																																																						
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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	<input type="text" value="QA Waste Transfer"/>	ACTIVE	Active								
ABBREVIATION	<input type="text" value="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	<input type="text" value="1234 Meeting St"/>	VOLUME UOM	cubic yard								
ADDRESS LINE 2	<input type="text"/>	DEFAULT TRANSPORTATION METHOD	Truck								
CITY	<input type="text" value="Houston"/>	DEFAULT SCALE TICKET FORMAT									
STATE	<input type="text" value="TX"/>	ONLINE ICON	Select Icon... <span style="background-color: #0070C0; color: white; padding: 2px 5px;">BROWSE...</span>								
POSTAL CODE	<input type="text" value="45069"/>	SIGNATURE	Select Signature <span style="background-color: #0070C0; color: white; padding: 2px 5px;">BROWSE...</span>								
PHONE	<input type="text" value="(513) 555-6565"/>	<a href="#">View Signature</a>									
CONTACT NAME	<input type="text" value="Stan Man"/>	MANIFEST SIGNATURE NAME	<input type="text" value="Stan Manny"/>								
EPA ID	<input type="text" value="D_EPA234"/>	LINK SITE									
STATE ID	<input type="text" value="D_ST234"/>	<div style="border: 1px solid #0070C0; padding: 5px; margin-top: 5px;"> <div style="background-color: #0070C0; color: white; padding: 2px 5px; display: flex; justify-content: space-between; align-items: center;"> <span>Automatic Transfer Work Order</span> <span style="font-size: 1.2em;">?</span> </div> <table style="width: 100%; border-collapse: collapse; margin-top: 5px;"> <tr> <td style="width: 35%; padding: 5px;">SITE ID</td> <td style="width: 65%; padding: 5px;"><input type="text" value="4891700001"/></td> </tr> <tr> <td style="padding: 5px;">SITE NAME</td> <td style="padding: 5px;"><input type="text" value="QA Waste Transfer"/></td> </tr> <tr> <td style="padding: 5px;">SERVICE CODE</td> <td style="padding: 5px;"><input type="text" value="Manifest Consolidation"/></td> </tr> <tr> <td style="padding: 5px;">EVENT TYPE</td> <td style="padding: 5px;"><input type="text" value="Outbound / Shipping"/></td> </tr> </table> </div>		SITE ID	<input type="text" value="4891700001"/>	SITE NAME	<input type="text" value="QA Waste Transfer"/>	SERVICE CODE	<input type="text" value="Manifest Consolidation"/>	EVENT TYPE	<input type="text" value="Outbound / Shipping"/>
SITE ID	<input type="text" value="4891700001"/>										
SITE NAME	<input type="text" value="QA Waste Transfer"/>										
SERVICE CODE	<input type="text" value="Manifest Consolidation"/>										
EVENT TYPE	<input type="text" value="Outbound / Shipping"/>										
GEOFENCE RADIUS (METERS)	<input type="text" value="31"/>										
AVERAGE DURATION (MINS)	<input type="text" value="0"/>										
INTER-COMPANY BILL FROM ACCOUNT	<input type="text"/>										
INTER-COMPANY CHARGE CODE	<input type="text"/>										

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

TAX **2**

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			
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...				

Pathway: Setup > Operations > Disposal/Ship Location

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

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

1. 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.
2. The Surcharge Rate tab includes multiple updates:
  - o 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.
  - o 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.
  - o The Rate column has been updated to match the surcharge rate type.
  - o 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.
  - o 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.
3. Changes to Add/Update Surcharge Rate popup editor:
  - o End Date and Note fields have been added.
  - o 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** SETUP > SERVICES > SURCHARGE

ID ↑	NAME	TYPE	RATE INDEX	ASS	EXCLUDE FROM REVENUE CALCULATION	FRANCHISE FEE
1004	Dayton Franchise Fee	Percentage %			Yes	Yes
1005	Liberty Franchise Fee	Percentage %			Yes	Yes
1007	CCMSW Fee - Yardage	Per Cubic Yard			Yes	Yes
1008	Pearland Franchise Fee	Percentage %			Yes	Yes
1009	Fuel Surcharge-Commercial	Percentage %			No	No
1010	Fuel Surcharge-Residential	Percentage %			No	No
1011	Fuel Surcharge-Roll Off	Percentage %			No	No
1012	Fuel Surcharge 10%	Percentage %			No	No
1013	Fuel Surcharge 15%	Percentage %			No	No
1014	Fuel Surcharge 9%	Percentage %			No	No
1015	Fuel Surcharge-Rate Index	Rate Index %	DOE Fuel In		No	No
1016	Environmental Surcharge	Percentage %			No	No

**UPDATE SURCHARGE RATE**

SURCHARGE: Fuel Surcharge 15% 3

DIVISION: HOUSTON

SERVICE REGION: [Dropdown]

RATE: 15

EFFECTIVE DATE: 01/01/2000

END DATE: [Calendar]

NOTE: [Text Area]

**SAVE**

**Surcharge Rate** 1

Show Rate History

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: [Dropdown]

ASSIGNED TO: Isabel Navarro - Intern

PRIORITY: Low

DUE DATE: [Calendar]

REPEAT: None

NOTE: [Text Area]

COMPLETION NOTE: [Text Area]

COMPLETE?

USER: [Dropdown]

DATE: [Calendar]

NOTE: [Text Area]

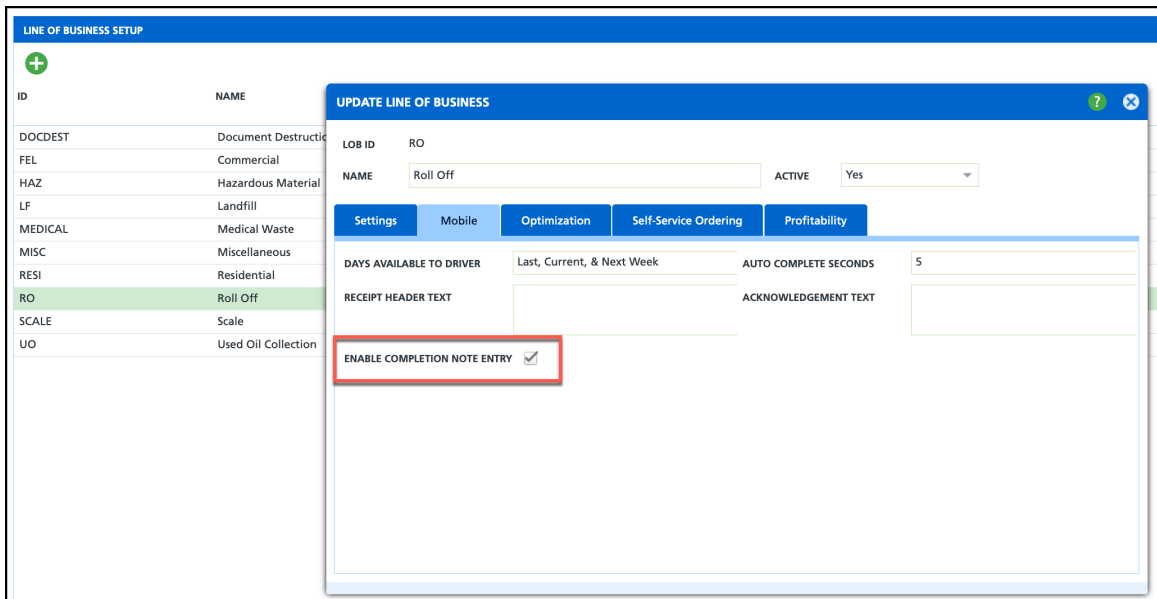
NOTIFY CONTACT: [Dropdown]

**SAVE** **CANCEL**

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

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

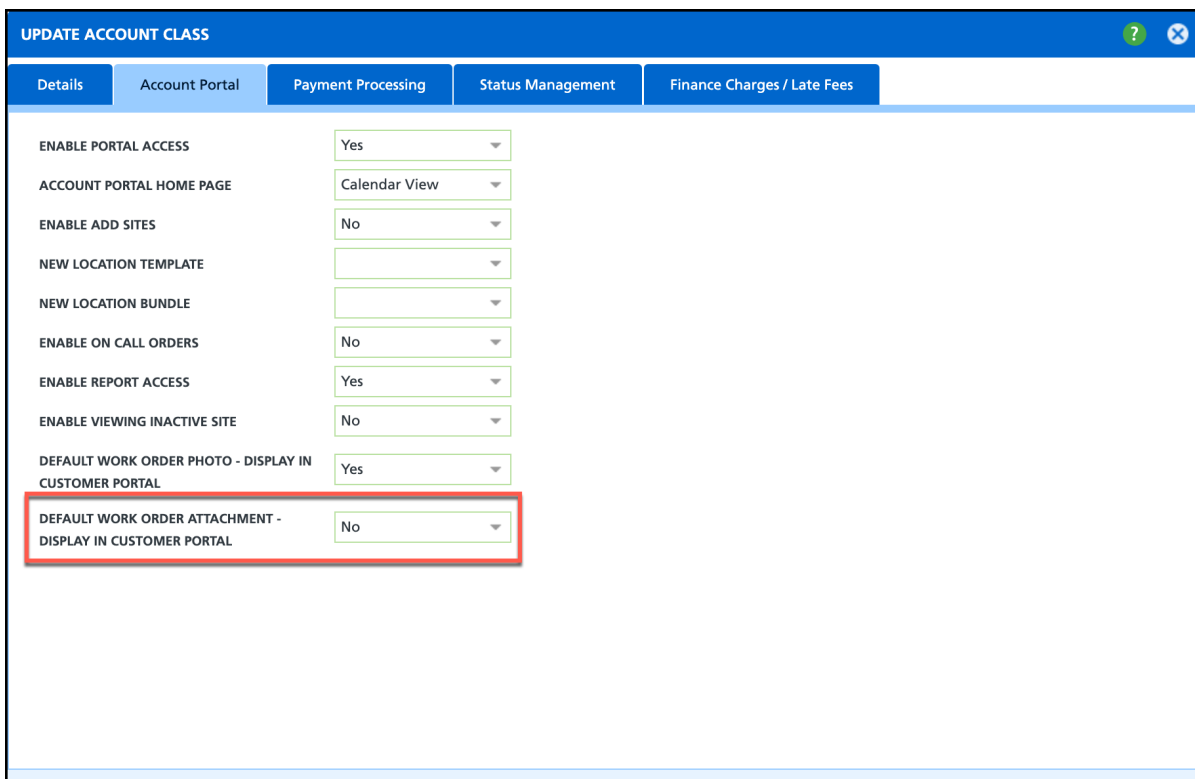
An 'Enable Completion Note Entry' check box has been added to the Mobile tab of the Add/Update Line of Business screen. By selecting this option, drivers will be able to include a completion note along with the service record.



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.



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



## 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		
<span style="float: left;">+ LINE OF BUSINESS: Commercial</span> <span style="float: left;">EQUIPMENT TYPE: All</span> <span style="float: left;">MATERIAL TYPE: All</span> <span style="float: right;">Hide Inactive</span>													<span style="float: right;">Search</span>		
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			
FLO2CDSE	2 YD FL Calendar Days Start and End		No	None	No	Front Load Ser...	No	Yes	Yes	Yes	No	No			
FLO2VCSO	2 YD FL Services Start Only		No	None	No	Front Load Ser...	No	Yes	Yes	Yes	No	No			
FLO2NWK	2 YD No Work Class		No	None	No		No	Yes	Yes	Yes	No	No			
FLO2PEOC	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

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

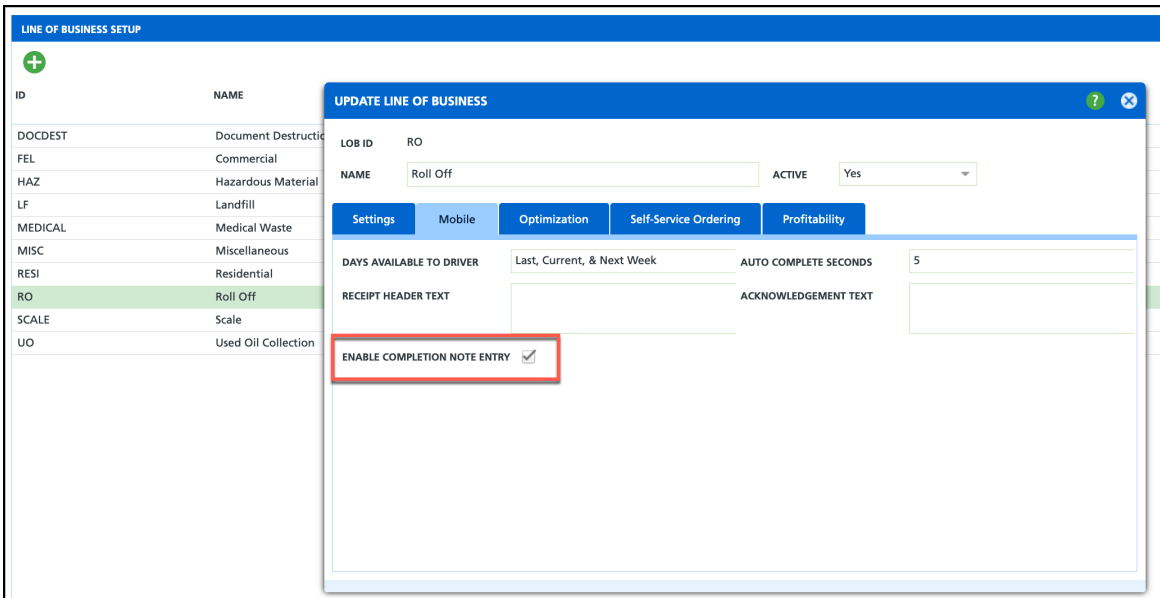
<b>TYPE</b>	<b>ASSIGNED TO</b>	<b>PRIORITY</b>	<b>DUE DATE</b>
<input type="text"/>	<div style="border: 1px solid #ccc; padding: 2px;">             Isabel Navarro - Intern              Dave Pike - Support Analyst              David Navarro - Admin-NS (Admin)              Deara Nikolouzos - Sales Rep (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           </div>	<input type="text"/>	<input type="text"/>
<b>REPEAT</b>	<b>NOTE</b>		
<input type="text"/>			
<b>COMPLETION NOTE</b>	<b>COMPLETE?</b> <input type="checkbox"/>		
<b>USER</b>	<b>DATE</b>	<b>NOTE</b>	<b>NOTIFY CONTACT</b>

SAVE
CANCEL

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

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

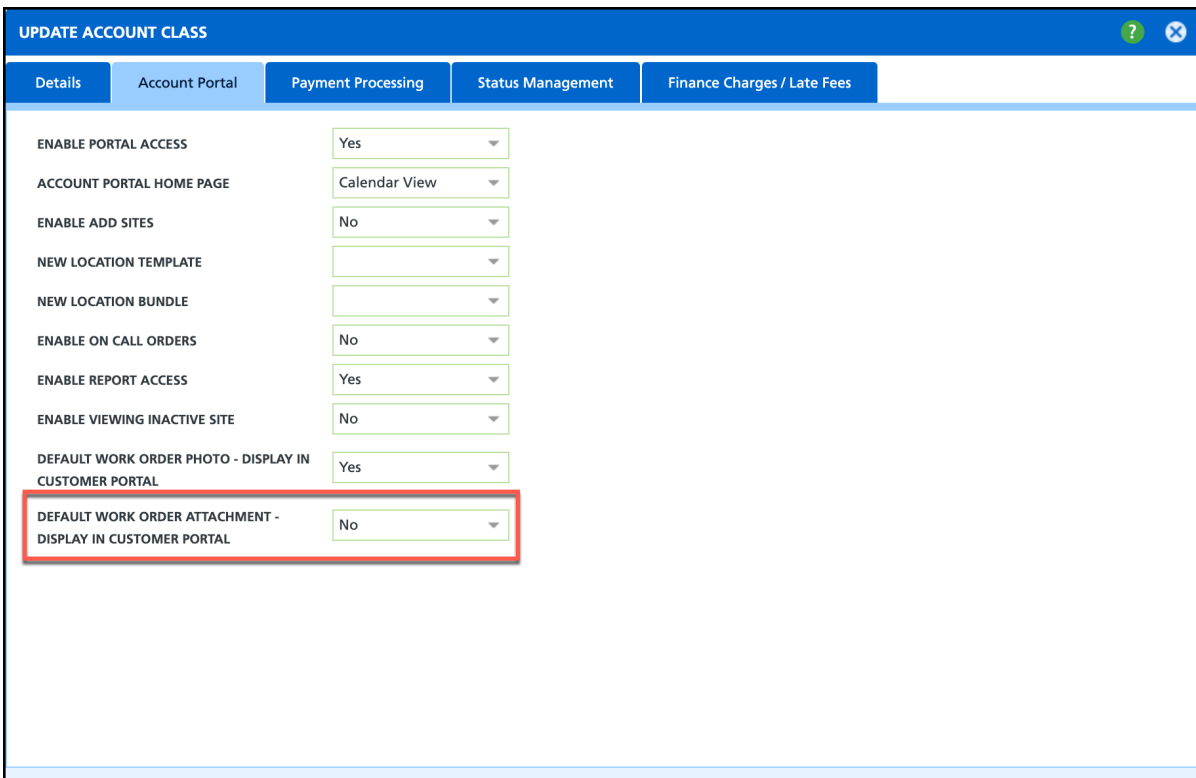
An 'Enable Completion Note Entry' check box has been added to the Mobile tab of the Add/Update Line of Business screen. By selecting this option, drivers will be able to include a completion note along with the service record.



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.



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.*

The screenshot shows the 'UPDATE BILL GROUP' interface with the 'Notifications' tab selected. The 'ONE INVOICE PER' dropdown menu is highlighted with a red box and set to 'Disabled'. Other settings include ID (QABILL), ACTIVE (Yes), NAME (QA Billing Cycle), DIVISION (QAWASTE), TYPE (Advance), FREQUENCY (Monthly), INVOICE FORMAT (Ryse Invoice 1), BILLING EXPORT FORMAT, CUSTOMER PORTAL URL, INVOICE MESSAGE, MESSAGE DUE IN PAST 1-30 DAYS, MESSAGE DUE IN PAST 30-60 DAYS, MESSAGE DUE IN PAST 61-90 DAYS, MESSAGE DUE IN PAST 91 DAYS, CUSTOM 1, CUSTOM 2, INVOICE EMAIL FROM (admin@navusoft.com), PRINT SEQUENCE (Invoice Number), INVOICE LOGO, UPLOADED INVOICE LOGO, INVOICE LOGO 2, UPLOADED INVOICE LOGO 2, WORK ORDER HEADER TEXT, SURCHARGE HEADER TEXT, FINANCE CHARGES TEXT (Finance Charges), BILLING AUTO PAY PROCESS DATE, SCHEDULED AUTO PAY TIME (12:00 AM, Central Standard Time), PAPER BILL FEE CHARGE CODE (Paper Bill Fee), PAPER BILL FEE (PER INVOICE) (2.50), MINIMUM INVOICE AMOUNT TO BE NOTIFIED (0.00), MINIMUM ACCOUNT BALANCE TO BE NOTIFIED (0.00), and 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, ADDRESS LINE 1, ADDRESS LINE 2, CITY/STATE/POSTAL CODE, PHONE, WEBSITE, POB, EPA, SIGNATURE REQUIRED

Billing Address:  Same as service address | NAME, ADDRESS LINE 1, ADDRESS LINE 2, CITY/STATE/POSTAL CODE, PHONE

CONTACT NAME, CONTACT PHONE, TITLE, PHONE TYPE, CONTACT EMAIL, BILLING CONTACT

Billing: BILL GROUP: QA Billing Cycle | INVOICE BY EMAIL, TERM: Net 20, CREDIT LIMIT: 500

SURCHARGE GROUP, AUTO STATUS UPDATE, APPLY FINANCE CHARGES, EXCLUDE FROM PAST DUE NOTIFICATION

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

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

EXPAND ALL | COLLAPSE ALL

RULE ID: 1004, 1007, 1008, 1009

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:
  - o Total shown on the Charges tab
  - o WO Minimum field
  - o Vendor Rate
  - o Per Unit column
  - o Minimum Type column
  - o Minimum column
  - o 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.

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: [Dropdown]

DIVISION: HOUSTON FUEL TYPE: Other

LINE OF BUSINESS: Commercial VEHICLE INSPECTION TYPE: DVIR

OWNERSHIP: Internal LICENSE PLATE: [Input]

ODOMETER UOM: [Dropdown] VIN: [Input]

SPEED UOM: [Dropdown]

Capacity Onboard Scale Camera System Maintenance Plan Attributes

VOLUME CAPACITY: 28.00 UOM: cubic yard

COMPACTION RATIO: [Input]

WEIGHT CAPACITY: 54900.00 UOM: pound

TARE WEIGHT: [Input] UOM: [Dropdown]

**MARK INACTIVE**

**CONFIRMATION**

Are you sure you want to deactivate 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	HAZARD REPORTABLE	COMPOSITION MATERIAL CLASS	DEFAULT UOM	RECYCLABLE
BRICK	Brick				1	C&D		Yes		ton	No
BRUSH	Brush				1	RECYCLE		No	RECYCLE		No
C&D	C&D				1	C&D		No			No
CHEMO	Chemo			C	1			No			No
CLEARGLS	Clear Glass				1	GLASS		Yes	GLASS	pound	Yes
COLORGLS	Colored Glass				1	GLASS		Yes	GLASS	pound	Yes
CONCRETE	Concrete	1234567890123...			1	C&D		Yes			No
DIESELFUEL	Flammable Liquids ...				1	HAZARDOUS	UN1993	No			No
DIRT	Dirt & Clean Fill				1	C&D		No			No
HAZCHEM	Hazardous Chemicals		Haz Chemicals	X	1	HAZARDOUS		No			No
METAL	Metal				1	RECYCLE		Yes	RECYCLE		Yes
MSW	MSW				1	MSW		No	MSW	pound	No
OCC	Cardboard				1	RECYCLE		Yes	RECYCLE	pound	Yes
OCCBALE600	OCC Bale 600 lbs				600	RECYCLE		No		pound	Yes

Material Type Value Conversions

DIVISION	FACILITY	PROCESSING STATUS	EFFECTIVE DATE	VALUE	UOM
----------	----------	-------------------	----------------	-------	-----

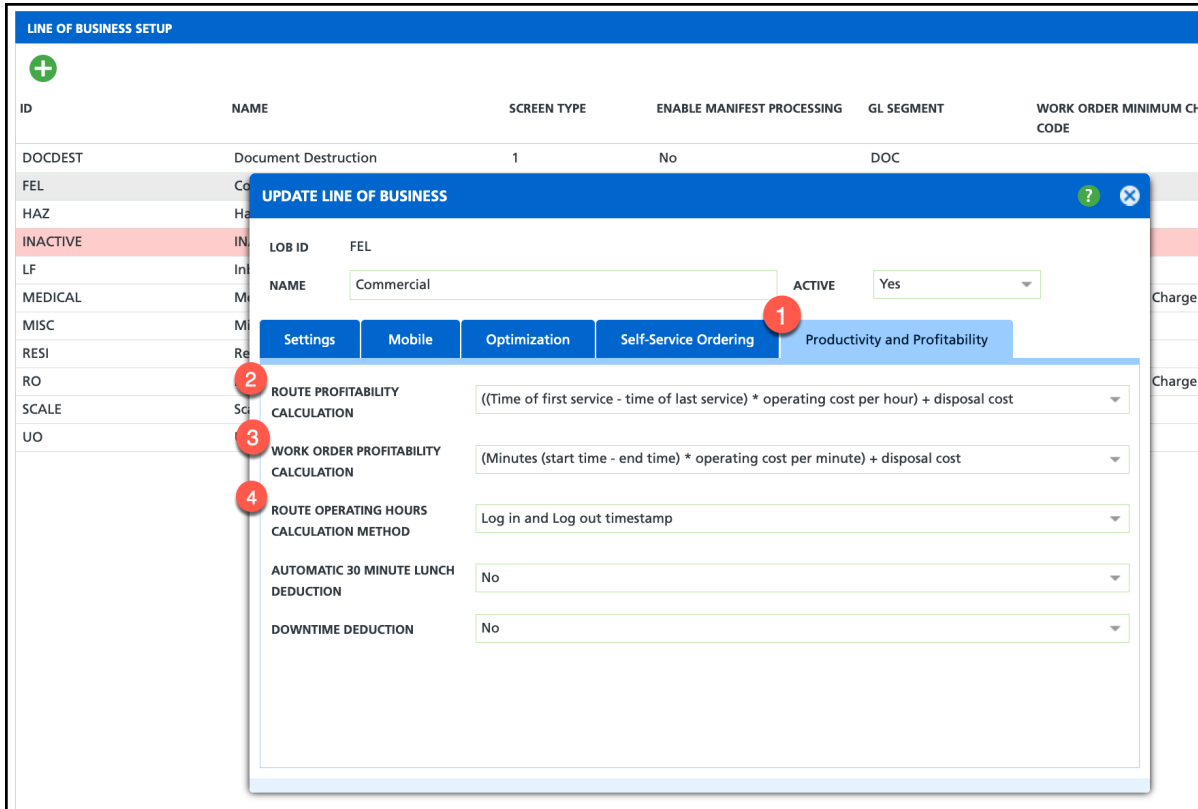
Pathway: Setup > Operations > Material Type/UN Hazardous Material

### 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:
  - o Route Operating Hours Calculation Method
  - o Automatic 30 Minute Lunch Deduction
  - o Downtime Deduction



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:
  - o Service Reminder - On Call Services - 1 business day prior at 7am
  - o Service Reminder - All Services - 1 business day prior at 7am

WORK TYPE SETUP													
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...		None			0	No	Yes	No	No	1	No
new1	new1	Com...		None			0	No	No	No	No	1	No

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

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					
STATUS	TARGET TABLE	TARGET FIELD	SEARCH		
Pending	All	All	Search		
DESCRIPTION	STATUS	CREATED BY	PROCESSED BY	TARGET TABLE	
Bill Group Update	Pending	Isabel Navarro	(Inactive)	Account	[-]
Site Bill Group Update	Pending			Site	[-]
Bill Group Update	Pending			Account	[-]
Test	Pending			Site	[-]
Bill Group Update	Pending			Account	[-]
Bill Group Update	Pending			Account	[-]
PG Bill Group Update	Pending			Account	[-]
mvd_test	Pending			Site	[-]

**ADD BULK UPDATE BATCH**

DESCRIPTION:

TARGET TABLE:

TARGET FIELD:

UPLOAD SOURCE FILE:

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	Q	X
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:

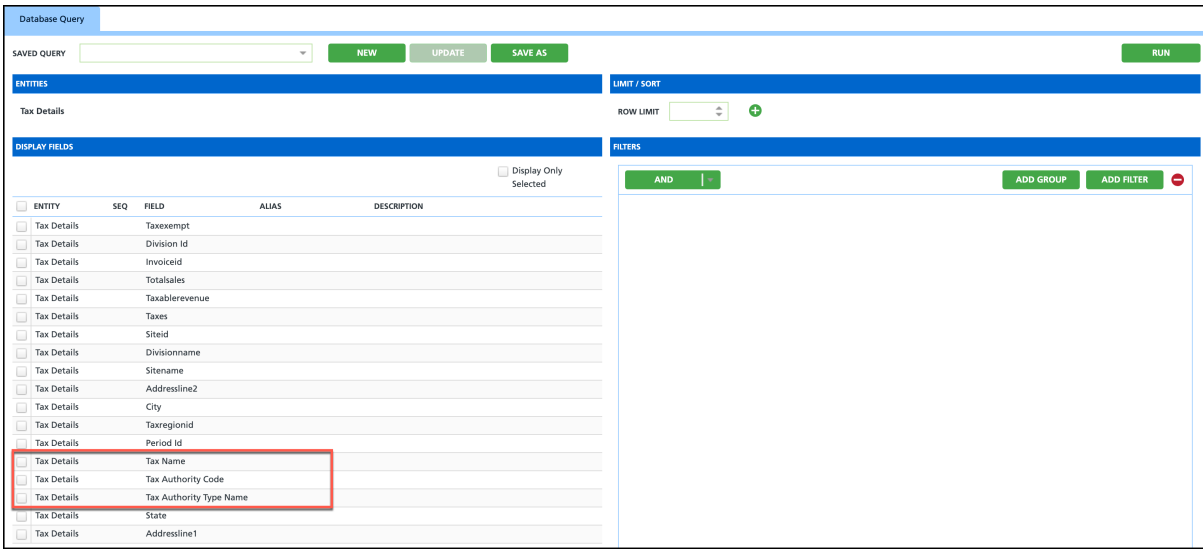
- Site Name
- Site Address Line 2
- Site City
- Site Zip
- Site State
- Site Address Line 1

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
30R 302	MSW	MSW	John Doe	RO	ton	GOODWILL		CORPUS CHRISTI	78415-5314	TX	1234 Cascade ST
30R 302	MSW	MSW	John Doe	RO	ton	GOODWILL		CORPUS CHRISTI	78415-5314	TX	1234 Cascade ST
30R 302	MSW	MSW	John Doe	RO	ton	GOODWILL		CORPUS CHRISTI	78415-5314	TX	1234 Cascade ST
30R 302	MSW	MSW	John Doe	RO	ton	GOODWILL		CORPUS CHRISTI	78415-5314	TX	1234 Cascade ST
30R 302	MSW	MSW	John Doe	RO	ton	GOODWILL		CORPUS CHRISTI	78415-5314	TX	1234 Cascade ST
30R 301	MSW	MSW	John Doe	RO	ton	GOODWILL		CORPUS CHRISTI	78415-5314	TX	1234 Cascade ST
30R 301	MSW	MSW	John Doe	RO	ton	GOODWILL		CORPUS CHRISTI	78415-5314	TX	1234 Cascade ST
30R 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)

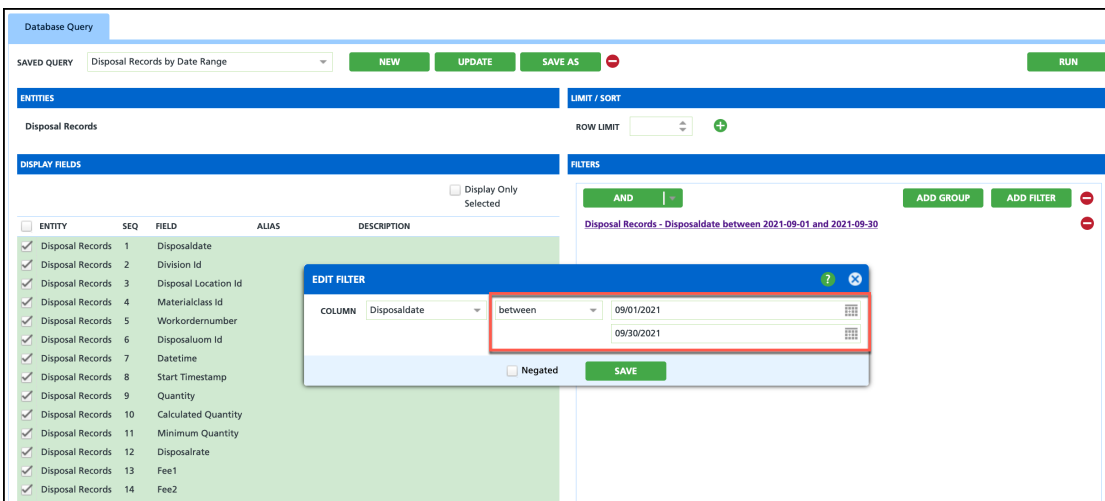
The following new fields have been added to the 'Tax Details' entity: Tax Name, Tax Authority Code, and Tax Authority Type Name.



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.



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 <span style="float: right;">✕</span>							
From Period		Oct 2023	thru	Jan 2024	Print Selected		
<input type="checkbox"/>	SCHEDULED DATE ↓	ID	SERVICE	QTY	EQUIPMENT	SVC QTY	WORK STATUS
<input checked="" type="checkbox"/>	Fri 01/12/24	<a href="#">7261044</a>	FL Delivery	1	2 Yard FL		Service Completed
<input checked="" 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 checked="" type="checkbox"/>	Wed 10/11/23	<a href="#">6805040</a>	RO Dump/Return	1	30 Yard Co...		Service Completed

Close

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.

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.

DIVISION	ASSIGNED TO	TYPE	STATUS
All	All	Customer Request	Not Completed

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		

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

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 screenshot shows the 'SYSTEM OPTIONS SETUP' interface with the 'Customer Portal' tab selected. The 'ENABLE AUTO PAY MAX AMOUNT' field is highlighted with a red box and set to 'No'. An inset window shows the 'Manage Automatic Payments' dialog box, also with 'Enable Automatic Payments' 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 screenshot shows the Customer Portal interface for account 21638 BIG STATE. It displays a 'PAST DUE' status of \$0.00 and a table of current services. A red box highlights a service entry with the ID 7259940, which has a status of '(Not Serviced - Bin Blocked)'. The table also shows other services like '4 Yard Trash Service' and '4 Yard Roll Off Rental Monthly'.

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 | 49037001 | testing - ti

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

**Prospect**

DIVISION: CORPUS  
ACCOUNT MGR: Aliena Somers  
CLASS: COMMERCIAL  
SOURCE: Cold Call  
REBATE PAYMENT: ACH

1 of 1 | 7500 E  
Houst  
Harris  
US  
(O) +1

**SELECT ACCOUNT** 1 of 10

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

Last Payment: 10-12-2023 - Bank Account 72675390... \$0.00

**SELECT SERVICE LOCATION** 1 of 3

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**

Pathway: Customer Portal