

# Release Version 74 [Archive]

Last Modified on 04/09/2026 7:45 am PDT



The release notes in this article correspond to release version 74. Screens and logic may have changed in newer versions.

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

Expand All Sections

Collapse All Sections

## Home Screen

### Recent Activity and Sales Rep (Homepages) - Account Requests Column Updated (16929)

In the Recent Activity and Sales Rep Homepages, the Account Requests column has been renamed to "Requests" and will display both account requests and cancellation requests.

REQUESTS	TASKS	QUOTES/CONTRACTS	APPOINTMENTS	ACTIVITIES
Please call me Navusoft Premier Waste And ... Open - 145 days old			Feb 09 8:00 am test	Today 12:06 pm Site Viewed 12:05 pm Site Viewed
Cancellation: Service Example Site 1 Received - 0 days old			Feb 12 9:00 am test	Fri 07/05/24 4:40 am Site Viewed 4:40 am Site Viewed
				Wed 07/03/24 12:53 pm Site Viewed 12:50 pm Site Viewed
				Tue 07/02/24 3:55 pm Site Viewed
				Tue 06/25/24 5:22 pm Site Viewed 1:30 am Site Viewed

Pathway: Recent Activity and Sales Rep Homepages

### Recent Activity and Sales Rep (Homepages) - Year Added To Date (16769)

The date format on the Recent Activity and Sales Rep homepages now includes the year.


REQUESTS	TASKS	QUOTES/CONTRACTS	APPOINTMENTS
Please call me Navusoft Premier Waste And Recycling Open - 160 days old			Feb 09 2024 8:00 am test
Cancellation: Service Example Site 1 Received - 15 days old			Feb 12 2024 9:00 am test

Pathway: Homepage

## Accounts

### Customer Service (Account) - Photo in Highlights Section Not Displaying Upon Hover (16968)

Previously, within the Highlights section on the Customer Service screen, images did not display as expected when the user hovered their mouse over the image icon. This has been resolved.

HIGHLIGHTS	PENDING																				
<p>Account is significantly past due</p> <p>Service exception WO# 7871256 scheduled Monday, July 1, 2024 - Bin Overloaded</p>	<p>9310 DAMAGE House Acct non Sys... 03/11/2024 Testing Task</p> <p>1561 Damage Test2 Dispatcher User 06/14/2024 5:13 pm Testing NAVU-16928</p> <p>06/28/2024 5:31 pm This is a request for vacation hold</p> <p>06/26/2024</p> <p>07/01/2024</p> <p>05/20/2024 Amount: \$ 35.00 , Note: Manual Char</p> <p>05/23/2024 Amount: \$ 35.00 , Note: Manual Char</p> <p>06/17/2024</p>																				
<p>ACTIVE SERVICES (4) Notes</p> <table border="1"> <thead> <tr> <th>QTY</th> <th>SERVICE CODE</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>6 Yard Trash Service</td> </tr> <tr> <td>1</td> <td>Enclosure</td> </tr> <tr> <td>1</td> <td>8 Yard Trash Service</td> </tr> <tr> <td>1</td> <td>2 Yard Trash Service (Temporary)</td> </tr> </tbody> </table>	QTY	SERVICE CODE	1	6 Yard Trash Service	1	Enclosure	1	8 Yard Trash Service	1	2 Yard Trash Service (Temporary)	 <table border="1"> <thead> <tr> <th>ACCOUNT</th> <th>RATE</th> </tr> </thead> <tbody> <tr> <td>18 CHINESE RESTAURANT 1325 BROADWAY ST</td> <td>\$ 262.47 per month</td> </tr> <tr> <td>18 CHINESE RESTAURANT 1325 BROADWAY ST</td> <td>\$ 68.46 per month</td> </tr> <tr> <td>888 CHINESE RESTAURANT 1325 BROADWAY ST</td> <td>\$ 349.12 per month</td> </tr> <tr> <td>888 CHINESE RESTAURANT 1325 BROADWAY ST</td> <td>\$ 100.00 per month</td> </tr> </tbody> </table>	ACCOUNT	RATE	18 CHINESE RESTAURANT 1325 BROADWAY ST	\$ 262.47 per month	18 CHINESE RESTAURANT 1325 BROADWAY ST	\$ 68.46 per month	888 CHINESE RESTAURANT 1325 BROADWAY ST	\$ 349.12 per month	888 CHINESE RESTAURANT 1325 BROADWAY ST	\$ 100.00 per month
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<p>CALENDAR July, 2024</p> <p>EVENTS Appointment, AR, Cancellation, Complaint, Ei</p>	<p>\$ 780.05</p>																				

Pathway: Customer Service Screen > Highlights section

### Accounts - Keyboard Functionality Improved Across Multiple Screens (16884, 16885, 16624)

To improve keyboard compatibility, minor changes are being made to various screens. These changes include adjustments to fields with drop-down time entry selections and numeric fields that previously used +/- arrows.

**ADD ACTIVE SERVICE**

REASON CODE: ADD-New Business | START DATE: 07/02/24 Tuesday | Week 27 (B) | 0 per cubic yard (new)

QTY: 22 | EQUIPMENT: 4 Yard FL | SERVICE CODE: 4 Yard Trash Service | FREQUENCY: 2x per week | PER UNIT: 0.0000 | SERVICE FEES: 0.00 month

SERVICE DAYS:  Mon  Tue  Wed  Thu  Fri  Sat  Sun

REQUESTED BY:

SERVICE NOTES:

FL Delivery | ROUTE:  | DATE: 07/02/24 Tuesday

WORK ORDER NOTES:

Map: Driscoll Children's Hospital, Walgreens, etc.

SERVICE CHARGES	RATE	UOM	NO CHARGE QTY	EST QTY	MINIMUM TYPE	MINIMUM	MAX WEIGHT	OVER MAX WEIGHT RATE	WORK TYPES
Front Load 04YD Extra Pickup	0.0000	each	0						1

SAVE

In the image example above, the +/- arrows were removed from the Rate field displayed on the Add Active Service screen.

### Generate Invoice (Accounts) - Performance Improved to Preview Invoice (16906)

The performance of the Preview Invoice screen has been improved. This update resolves an issue where the amount displayed on the Preview screen differed from the amount generated on the generated invoice if it included a prorated service.

**PREVIEW INVOICE**

This Site | BILL TO DATE: 06/24/2024 | INVOICE DATE: 07/24/2024 | Arrears - Monthly | Billed Thru Date Jul 31, 2024 | Next Invoice Date Jul 05, 2024 BATCH-25874 (not started)

SITE ID	START DATE	END DATE	GROSS QTY	NO CHARGE QTY	QTY	NAME	PO #	AMOUNT	SURCHARGES	TAXES	TOTAL
<input checked="" type="checkbox"/>											
<input checked="" type="checkbox"/>	Inactivity Rental Fees 125768 - Inactivity Rental Fees - 2024-02-01 to 2024-03-14										
41898001					43	Inactivity Rental Fees - 2024-02...		\$ 215.00	\$ 0.00	\$ 0.00	\$ 215.00
Total								\$ 215.00	\$ 0.00	\$ 0.00	\$ 215.00

GENERATE INVOICE

Pathway: Accounts > Search > Accounts

## Create Account (Accounts) - Account and Site Custom Properties Moved (17085)

Within the 'Create Account' screen, *Account Custom Properties* and *Site Custom Properties* have been relocated to the bottom left of the screen.

The screenshot displays the 'CREATE ACCOUNT' form with the following sections:

- Header:** CREATE ACCOUNT (left), ACCOUNTS > ADD ACCOUNT (right)
- Form Fields:** STATUS, SOURCE (Call In), ACCOUNT DIVISION (HEARNE), SITE DIVISION (HEARNE), ACCOUNT CLASS (RESIDENTIAL)
- Service Address:** NAME, NAME 2, ADDRESS LINE 1 (Enter a location), ADDRESS LINE 2, CITY/STATE/POSTAL CODE, PHONE ((999) 999-9999)
- Billing Address:**  Same as service address, NAME, NAME 2, ATTN, ADDRESS LINE 1 (Enter a location), ADDRESS LINE 2, CITY/STATE/POSTAL CODE, PHONE ((999) 999-9999)
- Contact Information:** CONTACT NAME, TITLE, CONTACT EMAIL, CONTACT PHONE ((999) 999-9999), PHONE TYPE, BILLING CONTACT (checked)
- Billing:** BILL GROUP, SURCHARGE GROUP (Fuel Surcharge 10%), INVOICE BY EMAIL (No), AUTO STATUS UPDATE (checked), EXCLUDE FROM PAST DUE NOTIFICATION (unchecked), TERM (COD), APPLY FINANCE CHARGES (checked), CREDIT LIMIT (0)
- Regional Settings:** SALES REP (House Account), SITE CLASS, SERVICE REGION (Hearne\_SR), TAX REGION (ALAMO HEIGHTS CITY), ORIGIN
- Custom Properties:** ACCOUNT CUSTOM PROPERTIES, SITE CUSTOM PROPERTIES (highlighted with a red box)
- Buttons:** CREATE ACCOUNT, CLEAR

Pathway: *Accounts > Add Accounts*

## Add/Edit Account (Accounts) - Broker Group Field Added (17084) [New Feature]

A new Broker Group field has been added to the Add/Edit Account screen. To enable this field, the following setup is required:

- In *Setup > System > System Options*, under the Account tab, 'Require Broker Group For Broker Account Class Type' must be set to "Yes."
- In *Setup > Account*, a new 'Broker Group' setup screen has been added.
  - In here, users must search for an existing broker account to create the broker group.
- In Add/Edit Account, the Account Class selected must be "Broker."

EDIT ACCOUNT
?
✕

Account

Settings

NAME

NAME 2

ADDRESS LINE 1

ADDRESS LINE 2

CITY/STATE/POSTAL CODE

PHONE

ATTN

BILLING PHONE

FAX

BILLING CONTACT 1

BILLING CONTACT 2

PARENT ACCOUNT

STATUS

DIVISION

SOURCE

ACCOUNT MANAGER

**ACCOUNT CLASS**

**BROKER GROUP**

COLLECTION AGENT

WEBSITE

LOGO

OLD ID

Pathway: *Accounts > Search > Accounts*

### Account Status (Accounts) - Internal/External Collection Status Options Added (17081) [New Feature]

Two new status options, 'Internal Collections' and 'External Collections,' have been added to the Account Status drop down menu. To apply either status, the following requirements must be met:

- In *Setup > Accounting*, a new 'Collection Group / Agency' setup screen has been added to record the specific collection group or agency the account was sent to. Setup here is used in the *Edit Account Status History* screen.
- To apply either status, the account must not have an active service at any site.

Screen changes general users will see include:

- In *Accounts > Search*, 'Internal Collections' and 'External Collections' filter options were added.
- In Account Details, if a collection status is applied, the name of the collection group or agency will display in orange between the account's Status and Division fields. In addition, orange coloring was also applied to the details of the account including the calendar days and calendar legend.
- In AR Aging Management, the following changes were made:
  - 'External Collections' and 'Internal Collections' have been added to the Account Status drop down filter.
  - A Collection Group / Agency filter option was added.
  - The option to bulk update accounts to Internal Collections or External Collections was added.
  - The option to allow for single updates to 'Internal Collections' or 'External Collections' was added.

The screenshot displays the 'EDIT ACCOUNT' interface. The main form is divided into two tabs: 'Account' and 'Settings'. The 'Account' tab is active, showing various fields for account information. A modal window titled 'EDIT ACCOUNT STATUS HISTORY' is overlaid on the main form, allowing users to change the account status.

**Account Details:**

- NAME: Example Account 6
- NAME 2: [Empty]
- ADDRESS LINE 1: 1234 Navu Way
- ADDRESS LINE 2: [Empty]
- CITY/STATE/POSTAL CODE: Corpus Christi TX 78411
- PHONE: (361) 854-0841
- ATTN: [Empty]
- BILLING PHONE: (999) 999-9999
- FAX: (999) 999-9999
- BILLING CONTACT 1: Aliena
- BILLING CONTACT 2: SIERRA
- PARENT ACCOUNT: [Empty]

**Account Settings:**

- STATUS: Active
- DIVISION: Inactive (Requires a \$ 0.00 account balance and no active sites)
- SOURCE: Prospect (Requires a \$ 0.00 account balance and no active sites)
- ACCOUNT MANAGER: Active
- ACCOUNT CLASS: Bad Debt (Requires a \$ 0.00 account balance (balance write off) and no active sites)
- COLLECTION AGENT: Internal Collections (Requires no active services for Account)
- WEBSITE: [Empty]
- LOGO: Select logo... BROWSE...
- OLD ID: [Empty]

**EDIT ACCOUNT STATUS HISTORY Modal:**

- NEW STATUS: Internal Collections
- EFFECTIVE DATE: 08/07/2024
- COLLECTION GROUP / AGENCY: AGENCY1|
- NOTE: [Empty text area]
- SAVE: [Green button]

Pathway: Accounts > Search > Accounts

### Add/Edit Contact (Accounts) - Additional Contact Option for Invoice & Past Due Notifications (17099) [New Feature]

Edit Contact has been updated to include the option to allow a non-billing contact to receive invoice and past-due notifications. For this, the following requirements must be met:

- This field only displays **IF** 'None' is selected for the Billing Contact field **AND** the contact link type is Account-level (Customer Portal Access tab - Accounts check box is selected).
- For the 'Receive Invoice Notifications' option to work, the primary billing contact on the account must have their delivery option set to email. This setting ensures that additional non-billing contacts can also receive invoice notifications via email.

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✕
EDIT CONTACT

Details
Customer Portal Access
Tags
Activity History

TITLE	<input type="text"/>	
NAME	<input type="text" value="Aliena"/>	
EMAIL	<input type="text" value="Contact@fakeEmail.com"/>	
EMAIL 2	<input type="text"/>	
PHONE 1	<input type="text" value="(999) 999-9999"/>	<input type="text"/>
PHONE 2	<input type="text" value="(999) 999-9999"/>	<input type="text"/>
PHONE 3	<input type="text" value="(999) 999-9999"/>	<input type="text"/>
PHONE 4	<input type="text" value="(999) 999-9999"/>	<input type="text"/>
NOTE	<input style="height: 50px;" type="text"/>	
RECEIVE SERVICE NOTIFICATIONS	<input type="text" value="Yes"/>	
SERVICE NOTIFICATION METHOD	<input type="text" value="Email"/>	
REQUEST NOTIFICATION METHOD	<input type="text" value="None"/>	
BILLING CONTACT	<input type="text" value="None"/>	
RECEIVE INVOICE NOTIFICATIONS	<input type="text" value="Yes"/>	(Notifications are only sent for accounts with invoice delivery set to email)
RECEIVE PASTDUE NOTIFICATION	<input type="text" value="No"/>	
MOBILE OPT OUT?	<input type="checkbox"/>	
ENABLE PORTAL ACCESS	<input checked="" type="checkbox"/>	
PORTAL USER	<a href="#">Portal UserId 16746, Last Login Jul 1, 2024 10:09 am</a>	

SAVE
UNLINK FROM ACCOUNT

## Proposals (Accounts) - Updates to Proposal Pre-Authorization and Support for Terms Addendum and Surcharge Rates (16922, 17060, 17082) [New Feature]

Proposals can now be configured to require either a single pre-authorization or two pre-authorizations before being sent to a customer. Additionally, the Proposal screen has been updated to include settings for Terms Addendum and Surcharge Rates. Below are the setup instructions and requirements for pre-authorizations:



In both scenarios, the Division's *Cost/Target Pricing* must be defined and the Service Code must have 'Target Pricing (Weight Class)' selected for its Pricing Model. Setup Pathways for both can be found here:

- *Setup > System > Division*
- *Setup > Services > Service Code*

**EDIT TERMS CONTRACT - 4000**

Settings Services History **7** Attachment Master Agreement **Term Addendums 1** **Surcharge Rates 2**

ACCOUNT 49157 / Donut Friend

DOCUMENT FORMAT: Terms Contract | DOCUMENT TYPE: A - New Business PreAuth 2 A | STATUS: Open | SOURCE: [ ]

SALES REP: Aliena Somers - Admin-NS (A) | SOLD BY: PG NAVU (Customer Service) | FORM CONTACT: [ ] | [Linked Leads \(0\)](#)

TITLE: [ ] | PO NUMBER: [ ]

EFFECTIVE DATE: 08/12/2024 | DELIVERY DATE: 08/12/2024 | ESTIMATED CLOSE DATE: 08/12/2024 | CLOSE PROBABILITY: Medium

TERM: 24 Months | RENEWAL TERM: 12 Months | ANNUAL PRICE INCREASE LIMIT (%): 0 | RATE GUARANTEE (MONTHS): 0

PRINT EST. SURCHARGE: No | PRINT EST. TAX: No | GROUP METHOD: Site | MULTIPLE START DATES: [ ] | PRINT EST. WO CHARGES: [ ]

NOTE: [ ]

DELIVERY INSTRUCTION: [ ]

PAYMENT REQUIRED AT CUSTOMER SIGNATURE: Not Required

CUSTOM FIELD1 TEXT: [ ]

Pre-Authorized by PG 2 at 08/13/2024 5:53 pm

SAVE PRINT EMAIL ACCOUNT SIGNATURE

### Require 1 Approval

For the system to require a single approval before the proposal can be sent to the customer, the following must be true:

- In Setup > Document Formats > Type, the 'Pre-Authorization' field is set to either "Require Authorization for all Documents" OR "Require one Authorization for Documents with a rate below Max. Discount."

### Require 2 Approvals

For the system to require two approvals before the proposal can be sent to the customer, the following must be true:

- In Setup > Document Formats > Type, the 'Pre-Authorization' field is set to "Require two authorizations for Documents with a rate below Medium Weight Target, Addendum Terms, or a Surcharge Rate Override"

And any two of these are true:

- The Service Fees rate entered by the user is less than the medium weight rate.

- The proposal includes a Terms Addendum. Term Addendums are created in *Setup > Document Formats > Format > Terms Addendums (tab)*.
- The proposal includes a surcharge rate override where the rate is lower than the default rate.

## Approval Logic

**Pathway:** *Setup > System > User*

The system will identify the approver based on the manager listed in the Manager field of the user who drafted the proposal. If a second approval is required, the system will also require approval from the manager of the first approver, as specified in their user profile.

**EDIT USER - 5 - ALIENA SOMERS (ADMIN-NS)**

LAST LOGIN Aug 20, 2024 8:23 am

STATUS	Active	DEFAULT HOMEPAGE	Recent Activity
FIRST NAME	Aliena	ONLINE IMAGE	Select Image... <b>BROWSE...</b>
LAST NAME	Somers	TITLE	Admin-NS
EMAIL	aliena@FakeEmail.com	DEPARTMENT	Admin
CELL PHONE	(999) 999-9999	<b>MANAGER</b>	Scott Smith
OFFICE PHONE	(999) 999-9999	SALES GOAL TYPE	Revenue
EXTERNAL ID		EXTERNAL USER ID	
DEFAULT APP COLOR	Blue	AUTOMATIC COUNTERSIGN	No
WORKER COST PER HOUR LEVEL		SIGNATURE IMAGE	Select Image... <b>BROWSE...</b>

**RESEND EMAIL INVIGATION**

## Cancellation Request (Accounts) - Edit Cancellation Request Updates (17104) [New Feature]

Two new tabs have been added to the Edit Cancellation Request screen:

1. A History tab has been added to track changes to cancellation requests, including updates to the assigned personnel and the current stage of the request.
2. A Linked Items tab has been added to the screen, enabling users to better manage cancellation requests by associating them with appointments, tasks, and notes.

The screenshot displays the 'EDIT CANCELLATION REQUEST' interface. It features a top navigation bar with tabs for 'Details', 'Attachments', 'History', and 'Linked Items'. Below the tabs is a table with columns: ID, NEW ASSIGNED TO, NEW STAGE, CREATED BY, CREATED ON, and NOTE. The table contains two rows of data. A dropdown menu is open, showing options: Add Appointment, Add Note, Add Task, Link Appointment, Link Note, and Link Task. The table below the menu shows two rows of linked items with columns for description, date, user, and note, each with a delete icon.

ID	NEW ASSIGNED TO	NEW STAGE	CREATED BY	CREATED ON	NOTE
1020	Aliena Somers	Received	Isabel Navarro	8/21/24 11:24 am	1234
1019	Isabel Navarro	Received	Isabel Navarro	8/21/24 9:14 am	123

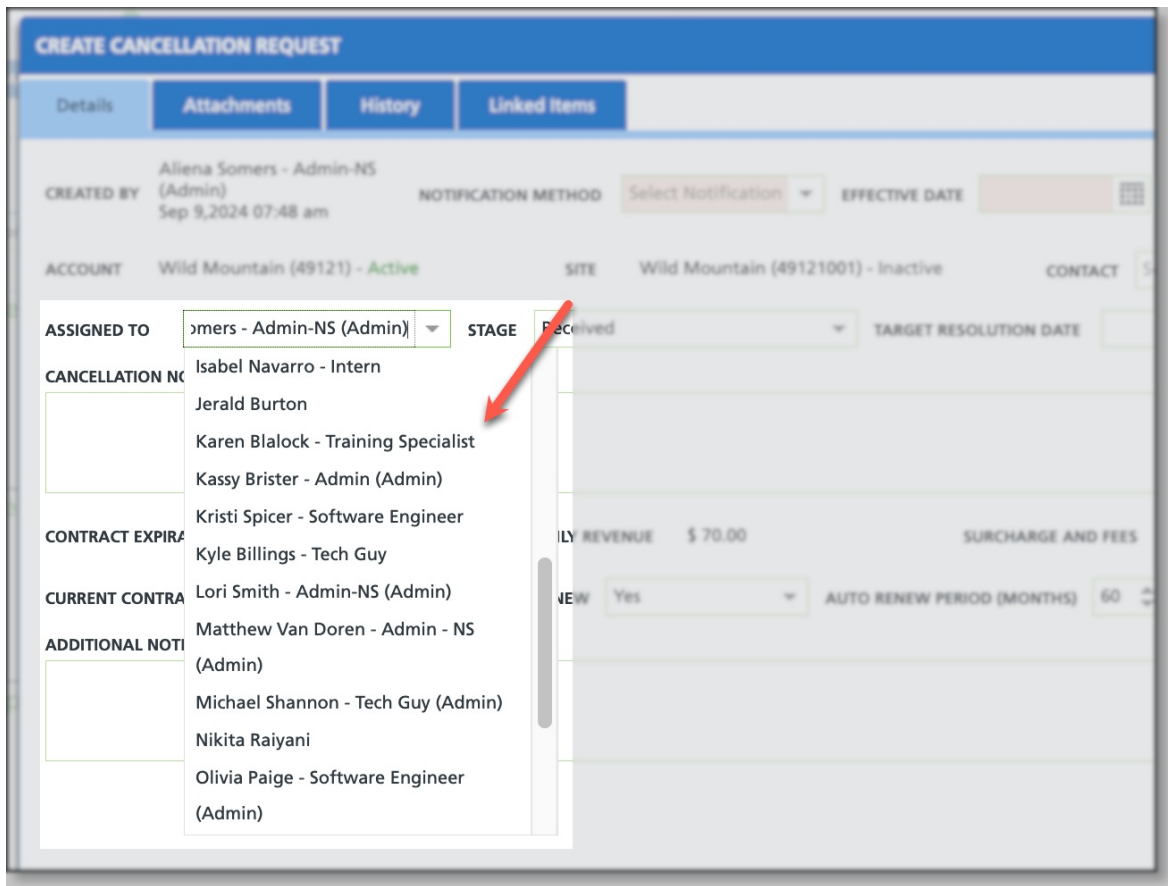
Description	Date	User	Note	Action
Send E-Mail	08/21/2024	Isabel Navarro	send email receipt	[-]
CANCEL NOTE	08/21/2024	Isabel Navarro	Do not send email	[-]

At the bottom of the interface are two buttons: 'SAVE' and 'DELETE'.

Pathway: Accounts > Search > Accounts

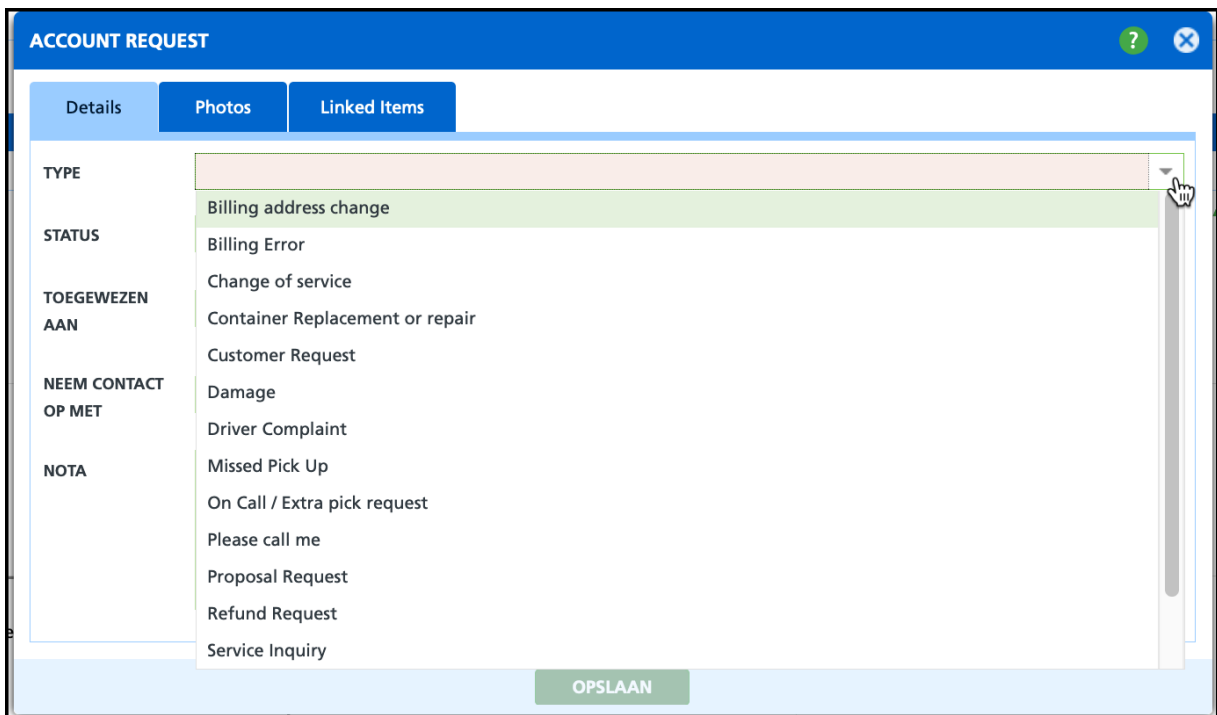
### Accounts - Display Title and Department After User Name - Affects Multiple Screens (17152) [New Feature]

An update has been implemented across multiple screens with user dropdown lists, now showing the user's title and department next to their name.



### Account Request (Accounts) - Inactive Request Types Continue to Display for Selection (17196)

Logic has been corrected to request types to restrict what is available to only active types.



Pathway: Accounts > Search > Accounts

### Customer Service Screen (Accounts) - Label Update for Wallet/Default Payment Method (17197)

Previously, when the 'Payment Methods' label in the Customer Portal and an account's AR History was updated to 'Wallet', the change unintentionally impacted other areas where the label was used. Any unintended changes have now been corrected.

Pathway: Accounts > Search > Accounts

### Transfer Service (Accounts) - Transfer Service Rate/Rate Per Unit Fixed (17203)

Previously, when transferring a service, the Rate and Rate Per Unit were being multiplied together instead of being directly copied, which resulted in incorrect rates for the transferred service. This has been resolved.

Pathway: Accounts > Search > Accounts

### WO Add Disposal / Shipment (Accounts) - Fields in Add Disposal / Shipment Record Rearranged (17296)

An issue has been resolved that was causing the Transport Method to clear out when selecting the Facility. In addition, this fix also included the rearrangement of fields in the Add Disposal / Shipment screen.

**ADD DISPOSAL / SHIPMENT**

FACILITY: [Dropdown] EXTERNAL TICKET #: [Text] STATUS: Completed

TRANSPORT METHOD: [Dropdown] TRUCK: [Dropdown] MATERIAL: [Dropdown]

NOTES: [Text Area]

Weights

WEIGHT IN: [Text] START: 10/04/24 Fri 12:00 AM QTY: 0

WEIGHT OUT: [Text] END: [Text] --:--

NET: [Text]

DISPOSAL RATE: [Text] FEE 1: [Text] FEE 2: [Text] TOTAL COST: [Text]

Ticket Image

Include Ticket Image With Invoice and make available in customer portal

Pathway: Work Order > Disposal / Ship (tab)

### Active Services (Accounts) - Add/Edit Service Frequency Error Message (17268)

In the Add/Edit Active Service screen, if 'Frequency' and 'Days' did not match, the Save button was inactive without an explanation. The logic has been updated to display a message indicating that the Frequency does not align with the number of selected Days. This logic also applies to services added to contracts and proposals.

**ADD ACTIVE SERVICE**

REASON CODE: ADD-Add Svc - New Service START DATE: 10/09/24 Wednesday Week 41 (B)

QTY: 1 EQUIPMENT: 4 Yard FL SERVICE CODE: 4 Yard Recycle Service FREQUENCY: 1x per week PER UNIT: 65.0000 SERVICE FEES: 65.00 month

SERVICE DAYS:  Mon  Tue  Wed  Thu  Fri  Sat  Sun

REQUESTED BY: [Text]

SERVICE NOTES: [Text Area]

FL Delivery ROUTE: [Text] DATE: 10/09/24 Wednesda

WORK ORDER NOTES: [Text Area]

Map

Google Keyboard shortcuts Map data ©2024 Google Te

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

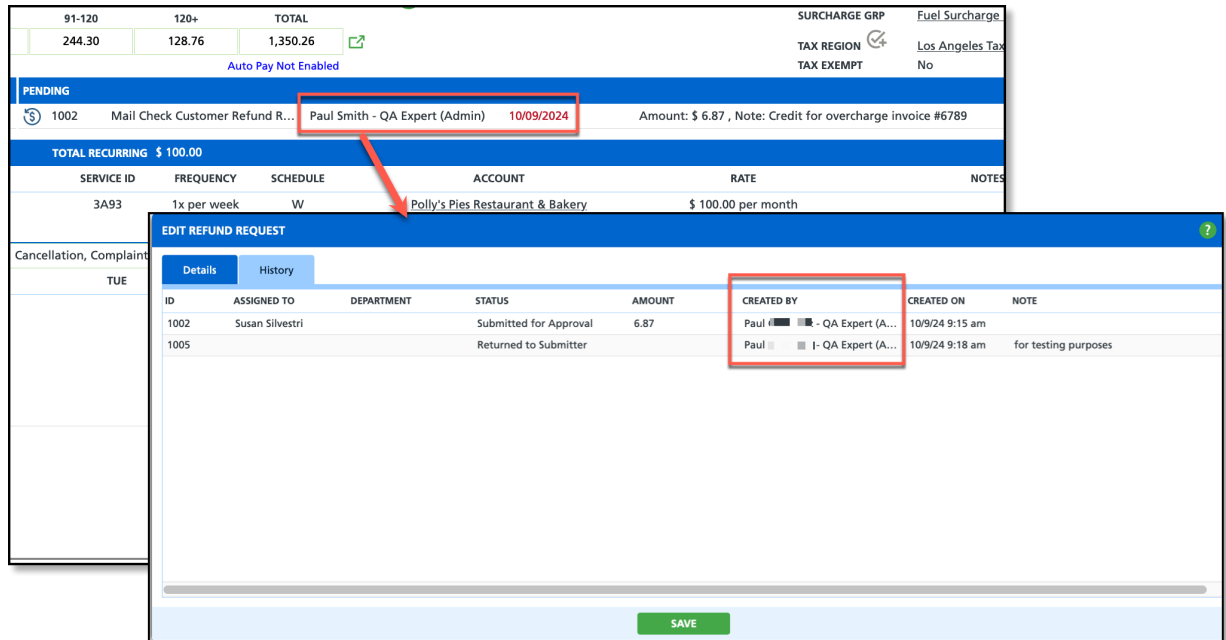
SAVE Service Days selected exceed current Frequency

Pathway: Accounts > Active Services

### Refund Requests (Accounts) - Tracking User Who Created Refund (17350)

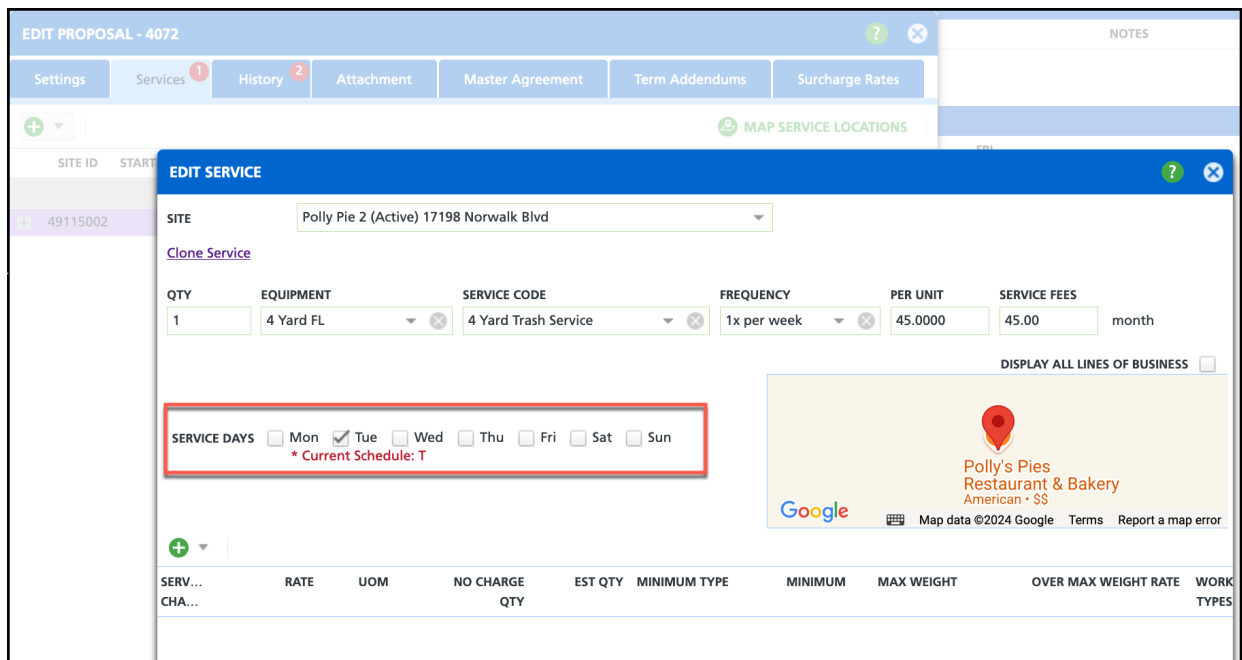
Enhancements have been made to track the user who created a refund request. This information can be viewed in the History tab of the new Edit Refund Request popup window, accessible by double-clicking the refund request in the Customer Service screen or the Refund Request Management screen within the Accounting module.

Related Release Note: [Refund Request Management](#)



### Edit Service (Proposals) - Availability of Service Days Selection (17306)

The Edit Service screen has been updated to always display the Service Days selection boxes, except when the frequency is set to on-call.



Pathway: *Accounts > Contracts and Proposals*

### Add Active Service (Accounts) - Only Allow Active Services to Accounts/Sites with an Active Status (17345)

The option to add an active service to a **site** is restricted if the site's status is:

- Inactive
- Prospect
- Vacant
- Exempt

The option to add an active service to an **account** is restricted if the account's account class is 'Vendor,' or the account's status is:

- Inactive
- Prospect
- Bad Debt

41903 Demo - Sales - Navusoft - Billing

Prospect

DIVISION DAYTON

ACCOUNT MGR House Account - House Account (Sales)

CLASS COMMERCIAL

SOURCE Cold Call

REBATE PAYMENT Not Applicable

PENDING

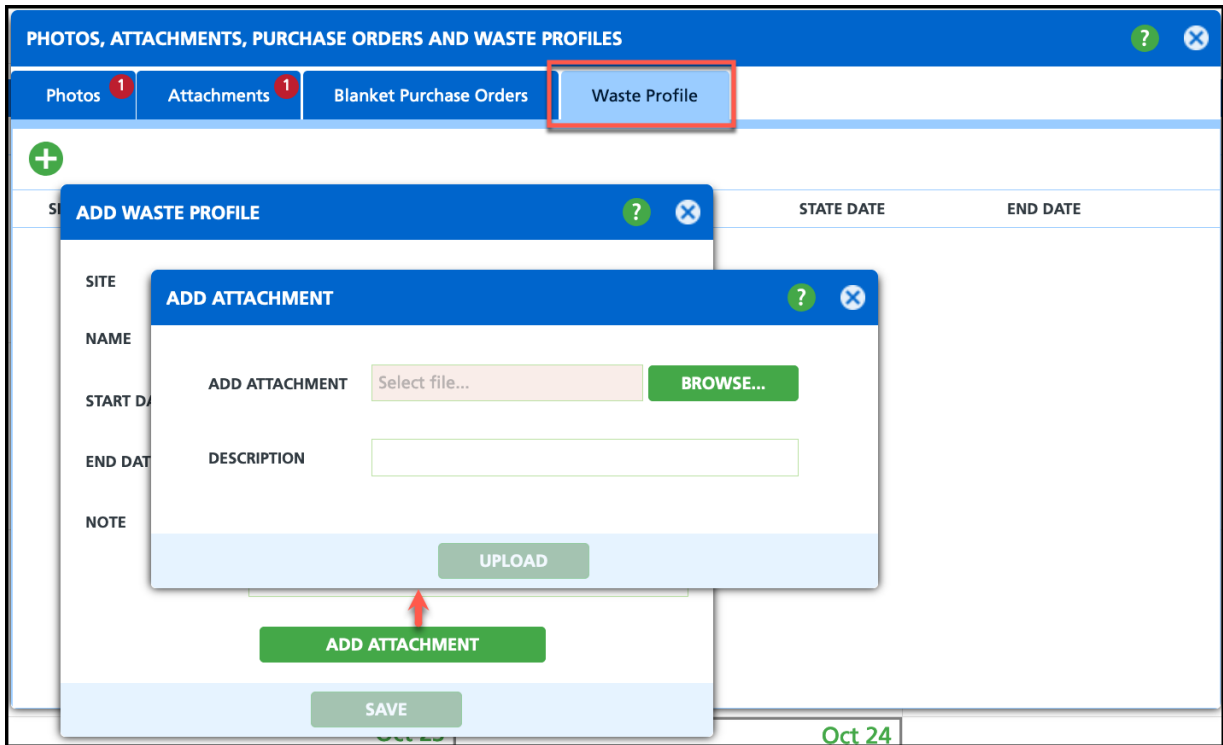
Events: Appointment, AR, Cancellation, Complaint, Er

Calendar: Sep 29, Sep 30, Oct 1, Oct 6, Oct 7, Oct 8, Oct 13, Oct 14, Oct 15

**'Add Active Service' is hidden in all applicable locations if the status does not permit it.**

### Waste Profile (Accounts) - Update to Add Attachment Option (17357)

In an account's Waste Profile, the 'Add Attachment' popup has been updated to remove the 'Type' selection box.



Pathway: Accounts > Photos, Attachments, Purchase Orders and Waste Profiles

### Reversed Invoices (Accounts) Logic Updated to Reminder Emails (17387)

The logic has been updated to exclude reversed invoices from invoice reminder notifications.

AR HISTORY							
CURRENT	1-30 DAYS	31-60 DAYS	61-90 DAYS	91-120 DAYS			
-48.00	0.00	0.00	0.00	0.00			
<input type="checkbox"/> Limit to open items	STATEMENT	INVOICE	AUTO APPLY	BALANCE WRITE OFF	WALLET (2)		
DATE	DUE DATE	PERIOD	SITE ID	TYPE	REFERENCE NO	AMOUNT	APPL
05/17/24		2024-05		Payment Reversal - Check	6685	132.00	
05/17/24		2024-05		Chargeback Reversal - Check	3521	12.00	
05/17/24		2024-05		Chargeback Reversal - Visa - Cr...	77176859_9999	10.00	
05/17/24		2024-05		Payment - Check	6685	(132.00)	
05/17/24	06/06/24	2024-05		Reversed Invoice	898991	0.00	
12/15/23		2023-12		Payment - Visa - Credit Card	77176859_9999	(20.00)	
10/11/23		2023-10		Payment - Check	3521	(50.00)	

Pathway: Accounts > AR History

### Search (Accounts) - Logic Updated to 'Account ID' Search Type (17391)

The 'Account ID' search type has been enhanced to support 'contains' searches by allowing the use of a percentage character (%) before the value.

**SEARCH TYPE**

Account ID

Prospect
  Active
  Credit Hold
  Bad Debt
  Inactive
  Internal Collections

ACCOUNT ID	NAME
18778	<u>BARNES SHEREE &amp; GREGORY</u> 1 site
18780	<u>BURCH MARTHA</u> 1 site
18781	<u>KATHY &amp; KENNETH HAYMAN</u> 1 site
18782	<u>HILL LAURA &amp; R. W..</u> 1 site
18784	<u>SIGLE BRANDON</u> 1 site
18785	<u>MITCHELL DAVID</u> 1 site
18786	<u>COWDEN CHARLES</u> 1 site
18787	<u>MONROE NANCY &amp; JEFF</u> 1 site
18788	<u>COX ALBERT</u> 1 site

Pathway: Accounts > Search

### Anniversary Billing (Accounts) - Logic Updated to 'Anniversary Next Bill Date' Field (17435)

The *Anniversary Next Bill Date* field now supports date editing. This field will only appear if the account is set to "Anniversary Billing" and cannot be cleared once set.

**EDIT SITE**

Basic Settings | **Billing Settings** | BIC Profile | Required Capabilities

TAX EXEMPT?

TAX EXEMPT REASON

SURCHARGE GROUP Fuel Surcharge - Commercial

INVOICE BY EMAIL Account Settings

SITE BILLING CONTACT1

SITE BILLING CONTACT2

PAYEE NAME

**ANNIVERSARY NEXT BILL DATE** 11/30/2024

BILL GROUP HOU-Anniversary 4 week

Advance - Anniversary 4 week  
 Billed Thru Date Nov 22, 2024  
 Next Invoice Date Oct 26, 2024 BATCH-25926 (in progress)

SAVE

Pathway: Accounts > Edit Site > Billing Settings

### Add Active Service (Accounts) - Default Service Days Based on Nearby Sites (17449) [New Feature]

In Add Active Service, the Service Days selection boxes will default to days based on nearby sites within a 5-mile radius. This logic considers service frequency and line of business, with default selections applied for frequencies of 1x and 2x only.

Pathway: *Accounts > Add Active Service*

### Add/Edit Proposal (Accounts) - Updates to Window Title and Selections in Status Field (17470)

The Add/Edit Proposal window has been updated with the following enhancements:

1. Renamed to "Add/Edit Document - Proposal" for clarity.
2. The **Status** drop down now displays options specific to the selected Document Format.

Pathway: *Accounts > Orders, Quotes and Contracts*

### Active Service (Accounts) - Updates to Add/Edit Service (17469, 17535) [New Feature]

The following enhancements have been applied to the Active Service screen:

1. Delivery and removal workflow fields are now hidden when 'Company' is not selected for Equipment Ownership, as the company is not responsible for the delivery or removal of equipment it does not own.
2. Service Days are displayed using single-letter abbreviations, with Sunday abbreviated as 'Su.'

**ADD ACTIVE SERVICE**

REASON CODE: ADD-Add Svc - New Service    START DATE: 12/02/24 Monday    Week 49 (B)

QTY	EQUIPMENT	SERVICE CODE	FREQUENCY	PER UNIT	SERVICE FEES
1	2 Yard FL	2 Yard Trash Service	1x per week	0.0000	0.00

EQUIPMENT OWNERSHIP: Company

SERVICE DAYS:  M  T  W  H  F  S  Su

REQUESTED BY: \_\_\_\_\_

SERVICE NOTES: \_\_\_\_\_

**1**  FL Delivery    ROUTE: \_\_\_\_\_    DATE: 12/02/24 Monday

WORK ORDER NOTES: \_\_\_\_\_

**2** DEFAULT DESTINATION: \_\_\_\_\_

Map: Port Of Christi Bulk Mater, river Rd, M (B Week), Up, Be, eastern Corp, i Airport, Hot, Google, IT (BSW), H, T, \*

Pathway: Accounts > Active Services

### Calendar (Accounts) - Calendar Timestamp to Use Local Time (17445)

The calendar's timestamp has been updated to align with the time zone configured for the division associated with the site.

**48988 The Coffee Shop**  
 22222 1st Ave  
 Houston, TX 55073-9726    **Active**

TERMS: Net 20  
 INVOICE DELIVERY: Email with Link

DIVISION: HOUSTON  
 ACCOUNT MGR: House Account - House Account (Sales)  
 CLASS: ROLL OFF-TEMP  
 BILL GROUP: HOU-COMMERCIAL ARREARS  
 ARREARS - MONTHLY Billed Thru Date None

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

**HIGHLIGHTS**    PENDING

ACTIVE SERVICES (1) Standard    TOTAL RECURRING

QTY	SERVICE CODE
1	10 Yard Open Top Service - Recycle

CALENDAR: December, 2024    EVENTS: Appointment, AR, Cancellation, Complaint, Er

SUN    MON    TUE

Dec 1    Dec 2    Dec 8

1, RO\_DELIVER, 10OT, REC  
 \$1 10 Yard Open Top Service - Recycle, ADD-Add Svc - New S  
 (1 views) - Aliena Somers

Submitted On: 12/2/2024 10:15 AM by Aliena Somers  
 Processed On: 12/2/2024 10:15 AM by Aliena Somers  
 Reason: ADD-Add Svc - New Service  
 New: 10 Yard Open Top Service - Recycle \$ 0.00 ,

Pathway: Accounts > Customer Service Screen

### Add Account (Accounts) - Update to Surcharge Group for Prospect Accounts (17586)

On the 'Create Account' screen, the Surcharge Group is now visible for the Prospect status and automatically

defaults based on the selected Service Region.

Pathway: Accounts > Add Account

### Service Record (Accounts) - Display of Site ID (17623)

The Service Record screen now displays the Site ID above the site name. When the service record is accessed from the Inbound/Outbound screen, the Site ID appears as a hyperlink to the Customer Service screen, with a Return option to navigate back to the Inbound/Outbound screen.

Pathway: Accounts > Calendar > (Select) Service Record | Operations > Inbound/Outbound > (Select) Service Record

### Active Services (Accounts) - Logic Updates to Site Service Charge Rates with Future Rate Increase (17585)

Previously, in the Active Services section of the Customer Service screen, the current pricing displayed in purple if a future site service charge existed, and the future change not shown. With this update, service charge rates with a future increase display in purple, with the Effective Date and future charge amount.

49096 **Food4Less** Active

4910 Huntington Dr S  
Los Angeles, CA 90032-1662  
US

TERMS Net 20  
INVOICE DELIVERY Printed

DIVISION QAWASTE  
ACCOUNT MGR Aliena Somers - Admin-NS (Admin)  
CLASS COMMERCIAL  
BILL GROUP QA Billing Cycle  
**ADVANCE - MONTHLY Billed Thru Date Nov 30, 2024**

CURRENT	1-30	31-60	61-90	91-120	120+	TOTAL
0.00	7,815.00	0.00	0.00	0.00	2,896.05	10,711.05

Auto Pay Not Enabled

**HIGHLIGHTS** | **PENDING**

Account is significantly past due | 11386 Adjustment Test | Aliena Somers

**ACTIVE SERVICES (3)** Standard | **TOTAL RECURRING \$ 1,020.00**

QTY	SERVICE CODE	REASON
1	2 Yard Trash Service	CHG-Temp Decrease In Svc

Equipment Owner:  
Adjustment-Commercial: \$ 0.00 each  
Effective: 12/27/2024  
Adjustment-Commercial: \$ 35.00 each

CALENDAR | December, 2024 | EVENTS | Appointment, AR, Cancellation, Complaint, Er

### Account Request Management (Accounts) - 'Division' and 'Assigned To' Logic Updated (17606)

The logic for the "All" selection in the **Division** and **Assigned To** filters on the Account Request Management screen have been updated to display only results for the divisions the user has access to.

ACCOUNT REQUEST MANAGEMENT						
DIVISION	DEPARTMENT	ASSIGNED TO	TYPE	STATUS		
All	All	All	All	Not Completed		
All		ASSIGNED TO	DATE	ACCOUNT/ SITE		CONTACT
QAWASTE	Service	Paul Gonzalez - QA Expert (Admin)	Fri 03/15/24 10:03 am	49068 TONCHIN LA / 49068001 TONCHIN LA		
+	1557 Customer Request	Test2 Dispatcher User - Dispatch (Operations)	Fri 06/14/24 12:06 pm	49111 Polly's Pies Restaurant & Bakery / 49111001 Polly's Pies Restaurant & Bakery		PG
+	1559 Customer Request	Test2 Dispatcher User - Dispatch (Operations)	Mon 06/17/24 01:06 pm	49111 Polly's Pies Restaurant & Bakery / 49111001 Polly's Pies Restaurant & Bakery		PGA
+	1561 Damage	Test2 Dispatcher User - Dispatch (Operations)	Fri 06/14/24 05:06 pm	43358 CHINESE CORPORATE / 43358001 888 CHINESE RESTAURANT		
+	1563 Vacation Hold Services	Michael Shannon - Tech Guy (Admin)	Fri 06/28/24 05:06 pm	43358 CHINESE CORPORATE / 43358001 888 CHINESE RESTAURANT		
+	1570 Customer Request	Chad Hendricks - Terminated (Operations)	Fri 09/06/24 02:09 pm	49157 Donut Friend / 49157001 Donut Friend		
+	1574 Billing Error	House Account - House Account (Sales)	Fri 10/11/24 09:10 am	48969 Staples Center / 48969001 Staples Center		
+	1575 Damage	Brad Sovich - NS Admin (Admin)	Fri 10/11/24 09:10 am	48969 Staples Center / 48969001 Staples Center		
+	1576 Customer Request	Aliena Somers - Admin-NS (Admin)	Thu 10/24/24 03:10 pm	48977 Jack in the Box / 48977001 Jack in the Box		AS
+	1577 Customer Request	House Account - House Account (Sales)	Thu 10/24/24 03:10 pm	48977 Jack in the Box / 48977001 Jack in the Box		AS

Pathway: Accounts > Account Request Management

### Photos (Accounts) - Updates to Photos in Accounts (17580)

The following updates and fixes have been applied to the Photos tab in Photos, Attachments, Purchase Orders and Waste Profiles:

1. The **Work Order #** column has been renamed to **Source** and now displays the ID of the source associated with the photo.
2. A resolved issue now allows photos from account requests to be viewed.



**EDIT SERVICE RECORD**

Site # 49232001	WORK ORDER	QTY	SERVICE CODE	EQUIPMENT	WORK TYPE	ORDER TYPE
Caribou Coffee 112 Chieftain St Osceola, WI 54020	8938669	1	4 Yard Trash Service (157746)	4YD	FL_EXTRAPU	On Call

ORDER NOTES

CREATED BY: Aliena Somers - Admin-NS (Admin) on 12/23/24 1:28 pm

ORDER REASON

PO NUMBER: 1234

EXTERNAL ID

Charges | **Payments** | C

+ DESCRIPTION

**ADD PAYMENT** ? X

**TYPE** ▼  
Credit Card - Non-Integrated Terminal

**PAYMENT AMOUNT**  
Cash  
Check  
Credit Card

**REFERENCE NUMBER**  
Credit Card - Non-Integrated Terminal

**NOTE**  
Debit Card  
Money Order

SAVE

**Pathways:**

**Accounts** > select Service Record > Payments (tab) | **Operations** > Inbound/Outbound > select Service Record > Add Payment | **Setup** > Division > Credit Card / ACH (tab)

**Active Services (Accounts) - Update to Ensure Unique Service IDs (17599)**

Service IDs have been updated to ensure uniqueness and prevent duplicates.

The screenshot displays a software interface for account management. At the top, account details for 'Jack in the Box' (48977) are shown, including address and contact information. Below this, a table lists active services with columns for quantity, service code, service ID, frequency, schedule, and rate. Two services are listed: '4 Yard Trash Service' and '10 Yard Open Top Service - Recycle'. A red arrow points from the second service row to an 'EDIT SERVICE RECORD' window. This window contains various fields for editing service details, such as 'WORK ORDER', 'SERVICE CODE', 'SCHEDULED DATE', and 'POSTING STATUS'. A legend on the right shows dates from Dec 6 to Dec 14.

QTY	SERVICE CODE	SERVICE ID	FREQUENCY	SCHEDULE	PER UNIT RATE	RATE	WO MIN.	START DATE	END DATE	CONTRACT EXP.
1	4 Yard Trash Service	157217	1x per week	M	\$ 285.00	\$ 285.00 per month		02/12/24	09/18/28	
1	10 Yard Open Top Service - Recycle	157857	1x per week	W	\$ 65.00	\$ 65.00 per month		12/16/24	09/18/28	

Pathway: Customer Service Screen > Active Services

### Statement (Accounts) - Due Date Added to Core Statement (17342)

An update was made to the core statement to include a Due Date column.



**HOUSTON**  
 PO BOX 260310-D  
 Dayton, OH 45134

**Pearland ISD**  
 PO BOX 7  
 PEARLAND, TX 77588-0007

**Statement**

43905	Current	1-30 days	31-60 days	61-90 days	91-120 days	Over 120 days	Total
Pearland ISD	0.00	0.00	0.00	0.00	0.00	473,419.12	<b>473,419.12</b>

**Limit to Open Items**

Date	Type	Due Date	Reference	Location	Site Name	Amount	Applied	Balance
1/31/24	Invoice	2/20/24	895081	43905030	PEARLAND ISD	2,115.96	0.00	2,115.96
1/31/24	Invoice	2/20/24	895080	43905028	PEARLAND ISD BUS BARN	2,068.78	0.00	2,068.78
1/31/24	Invoice	2/20/24	895079	43905027	PEARLAND ISD (AG BARN)	1,057.98	0.00	1,057.98
1/31/24	Invoice	2/20/24	895078	43905026	PEARLAND ISD JR HIGH	1,417.50	0.00	1,417.50
1/31/24	Invoice	2/20/24	895077	43905025	PEARLAND ISD MAGNOLIA ELEMENTA	16,244.90	0.00	16,244.90
1/31/24	Invoice	2/20/24	895076	43905024	PEARLAND ISD 9TH GRADE CENTER	44,162.16	0.00	44,162.16
1/31/24	Invoice	2/20/24	895075	43905023	PEARLAND ISD SPORTS FACILITY	2,168.74	0.00	2,168.74
1/31/24	Invoice	2/20/24	895074	43905022	PEARLAND ISD	14,663.74	0.00	14,663.74
1/31/24	Invoice	2/20/24	895073	43905021	PEARLAND ISD HIGH SCHOOL STADI	71,432.62	0.00	71,432.62

**Active Services (Accounts) - Last Activity Column Added (17668)**

The Active Services section of the Customer Service screen now includes a "Last Activity" column, displaying the date of the most recent service marked as 'Completed' or 'Not Serviced'.

49232 Caribou Coffee  
 112 Chieftain St  
 Osceola, WI 54020  
 US

Active

49232001 Caribou Coffee  
 112 Chieftain St  
 Osceola, WI 54020  
 Polk County  
 US

TERMS Net 20  
 INVOICE DELIVERY Printed

DIVISION QAWASTE  
 ACCOUNT MGR Aliena Somers - Admin-NS (Admin)  
 CLASS COMMERCIAL  
 BILL GROUP QA.Doc.4 Week Anniversary  
 ADVANCE - Billed Thru Date Dec 17, 2024

CURRENT	1-30	31-60	61-90	91-120	120+	TOTAL
30.00	0.00	0.00	0.00	0.00	0.00	30.00

Auto Pay Not Enabled

HIGHLIGHTS

PENDING

9343	Billing/AR question	Aliena Somers - Admin-NS (A...	12/23/2024	This is a test.
9346	Credit Request	Paul Gonzalez - QA Expert (A...	12/31/2024	Testing adding tasks to n
1579	Please call me	Aliena Somers - Admin-NS (A...	12/12/2024 10:25 am	

ACTIVE SERVICES (1) Standard TOTAL RECURRING \$ 103.92

QTY	SERVICE CODE	SERVICE ID	LAST ACTIVITY	FREQUENCY	SCHEDULE	PER UNIT RATE	RATE
1	4 Yard Trash Service	157746	12/12/24	1x per week	H	\$ 103.92	\$ 103.92 per month

Pathway: Accounts > Active Services

**Tiered Pricing (Active Services) - Tiered Pricing Cleared if Service Code was Updated in Site Service Rate Update Batch (16757)**

Previously, tiered pricing for a service code was cleared during a site service rate update batch if the service code

for the site was modified. This issue has been resolved, and tiered pricing will remain visible and unchanged.

The screenshot shows the 'ACTIVE SERVICES (2)' screen with a 'Standard' dropdown and a 'TOTAL RECURRING \$ 0.00' indicator. Below the service list, a 'TIERED PRICING' popup is displayed. The popup contains the following table:

FROM QUANTITY	TO QUANTITY	TYPE	RATE
1.00	5.00	Each	85.00
6.00	11.00	Each	75.00
12.00	1,000.00	Each	65.00

Pathway: Sales > Rate Update Batches > Site Service Batch | Customer Service Screen > Active Services > Tiered Pricing icon

### Invoice Adjustment (Accounts) - Update to Adjustment Period Drop-Down (17799)

The Period drop down in the Invoice Adjustment screen has been updated to show only the current period and the previous period, provided the previous period remains open.

The screenshot shows the 'INVOICE ADJUSTMENT - 900820 - 4/1/24 - \$ 25.00 - CREATED BY ALIENA SOMERS ON 1/27/25 10:16 AM' screen. The 'PERIOD' dropdown menu is open, showing the following options:

- 2025-01
- 2024-12
- 2025-01

The table below shows the invoice details:

DATE	SITE ID ↑	SITE NAME	WO #	QUANTITY	DESCRIPTION ↑	INVOICE AMOUNT	PREVIOUS ADJUSTMENTS	PENDING ADJUSTMENTS
04/01/24	49043001	Construction & Rem...		1	Late Fee Late fee for invoice ...	\$ 25.00	\$ 0.00	\$ 0.00

Pathway: Customer Service screen > AR History > [right-click on] Invoice > [select] View Details / Adjust Invoice

### User Activities (Accounts) - Underlined Values to Clearly Identify Details Available (17178)

The User Activity screen has been updated to better highlight activities with associated details. Clicking on an activity will display its details in the lower grid of the screen.

USER ACTIVITY								ACCOUNTS > USER ACTIVITIES
FROM	TO	DIVISION	DEPARTMENT	USER WITH ONE/MORE ACTIVITIES		VIEW	Search	
12/01/2024	01/27/2025	CORPUS, DAYTON, HEARNE	All	<input checked="" type="checkbox"/>	Standard			
USER	NEW PROPOSALS/CONTRACTS	NEW PROSPECTS	APPOINTMENTS	TASKS	NOTES	EMAILS SENT	SITES VIEWED	
Aliena Somers	8	8	0 / 1	0 / 3	5	19	98	
Aliena Tester	0	0	0 / 0	0 / 0	0	0	4	
Chris Fairchild	1	1	0 / 0	0 / 0	0	2	5	
Ean Smith	0	0	0 / 0	0 / 0	0	0	1	
Dave Pike	0	0	0 / 0	0 / 0	0	0	3	
David Navarro	0	0	0 / 0	0 / 0	0	3	41	
Jamie Hanson	0	1	0 / 0	0 / 0	0	0	0	
Ed Sulek	0	0	0 / 0	0 / 0	0	0	2	
House Acct non System	1	0	0 / 0	0 / 0	0	0	0	
Isabel Navarro	0	0	0 / 0	0 / 0	0	0	9	

CREATED DATE	ID	NAME	TYPE	NOTE	SALES REP
Dec 03 2024 8:22 am	49232002	Java Moose	General	New customer account review.	Aliena Somers
Dec 11 2024 11:30 pm	49232	Caribou Coffee	Collections		Aliena Somers
Dec 12 2024 1:32 am	44671	Melinda Strickland	General	Review invoice 235821	Aliena Somers
Dec 12 2024 3:30 am	49232	Caribou Coffee	Collections	Billing questions.	Aliena Somers
Dec 12 2024 3:30 am	49232	Caribou Coffee	Collections	Billing questions.	Aliena Somers

Pathway: Accounts > User Activities

### Create On Call Order (Accounts) - Update to Information Displayed on 'Create On Call Order' (16496)

The Create On Call Order pop-up editor has been updated to include the following information:

- o Site ID, Name and Address
- o EPA (if one exists)
- o Terms / Payment Required
- o Phone number
- o Contact (account contact, if one exists)
- o Business Hours - also added to the Edit Service Record pop-up editor
- o Site Access Note
- o Site Note

CREATE ON CALL ORDER
?
✕

Site # 49232001  
 Caribou Cafe  
 112 Chieftain St  
 Osceola, WI 54020  
 EPA: EPA Value  
 CONTACT Aliena +1 555-555-7026

**BUSINESS HOURS**  
 Weekdays 8:00 AM to 7:00 PM  
 ACCESS Always use East gate  
 SITE NOTE Collection Times: Before 8 AM to avoid business hours.

SCHEDULE DATE 01/30/25 Thursday SERVICE CODE 4 Yard Trash Service ORDER TYPE QUANTITY 1

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

CREATE

Pathway: Customer Service Screen > Calendar > [right-click] Create On Call Order

### Edit Service Record (Accounts) - Duplicated Site Service Charges (17616)

An issue has been resolved that caused service charges to be duplicated on a service record after a rate change was applied to the active service.

**EDIT SERVICE RECORD** ? X

Site # 49232001 Caribou Cafe 112 Chieftain St Osceola, WI 54020	WORK ORDER 9147306	QTY 1	SERVICE CODE 4 Yard Trash Service	EQUIPMENT 4YD	WORK TYPE FL_EXTRAPU	ORDER TYPE On Call	MATERIAL MSW
--	-----------------------	----------	--------------------------------------	------------------	-------------------------	-----------------------	-----------------

ORDER NOTES

CREATED BY  
Aliena Somers - Admin-NS (Admin) on  
2/4/25 10:06 am

ORDER REASON

PO NUMBER

EXTERNAL ID

SCHEDULED DATE

02/04/25 Tuesday 📅

ROUTE

SEQUENCE

0 ⬇️ ⬆️ ⬇️

DESTINATION / ORIGIN

WORK STATUS

Scheduled ⬇️

EXCEPTION REASON

POSTING STATUS

Pending ⬇️

Charges 1
Payments
Completion
Lab Tests
Attachments
Labels
Photos

Charges must match Equipment

Charges must match Material

WO MINIMUM ⬆️ ⬆️

CALCULATE LAB QTY AND DISCOUNT

GROSS QTY	LABELS	NO CHARGE QTY	CHARGE QTY	UOM	CHARGE CODE	PER UNIT	VENDOR RATE	MINIMUM TYPE	MINIMUM	TOTAL
1			1	each	Adjustment-Commercial	\$ 0.00		None		\$ 0.00

Select Print Format 🖨️

SAVE (F2)

Pathway: Customer Service screen > [open] Service Record

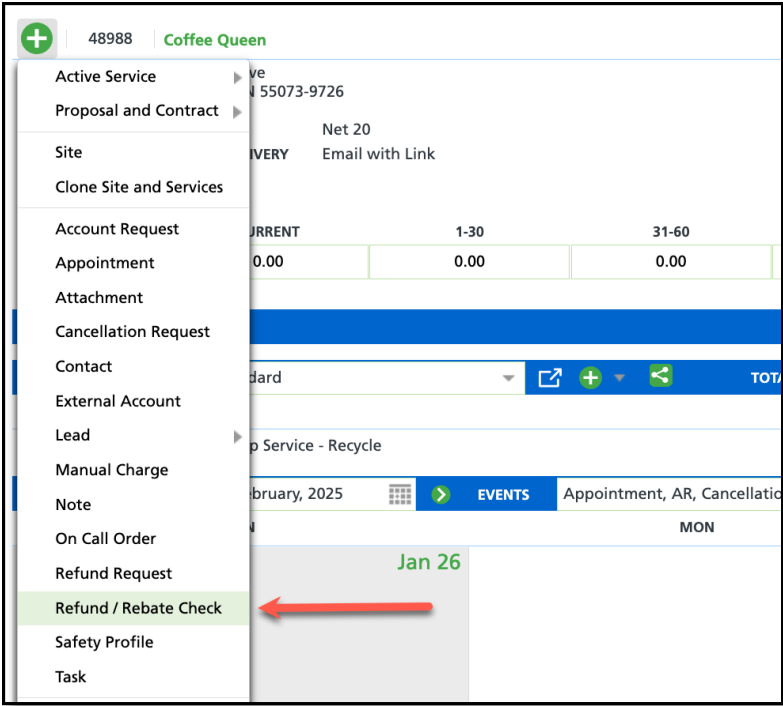
### Refund / Rebate Check (Accounts) - Updates to Rebate Check Prepayment to Better Support Refund Scenarios (17503)

Enhancements have been made to Customer Service, AR History, Permissions, and other areas to expand rebate check prepayment, providing better support for refund scenarios.

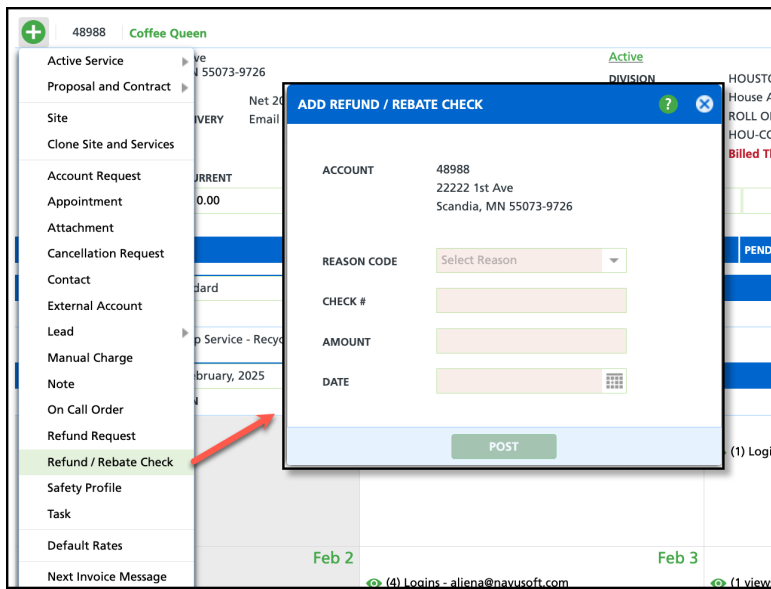
#### Customer Service Screen

In the Menu dropdown, 'Rebate Check Prepayment' has been renamed to 'Refund / Rebate Check.'

Additionally, permission 174 ('Add Rebate Check Prepayment') has been renamed to 'Add Refund / Rebate Check' and now grants access to the 'Refund / Rebate Check' option in the Customer Service screen's menu.



Add Refund / Rebate Check



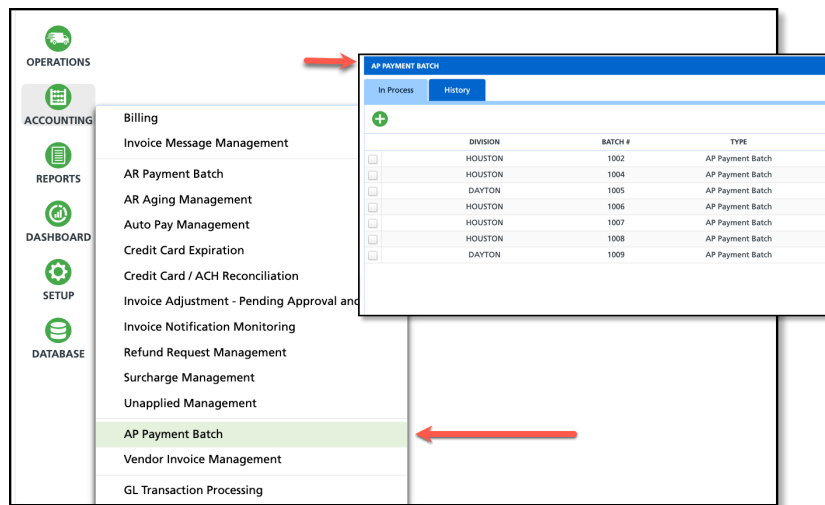
The Add Prepayment window has been updated to '**Add Refund / Rebate Check**' and the following other enhancements have been applied to the screen:

- Account ID is just 'Account'.
- **Addition** of a Reason Code drop down.
- **Removal** of up/down arrows from the Check # and Amount fields.
- **Logic updated** to Amount field to require an entry value greater than '0'.
- **Post logic** has been updated to allow only positive amount values.

## Main Menu - Vendor/Rebate Payments

The 'Vendor/Rebate Payments' main menu option and its corresponding screen have been renamed to 'AP Payment Batch.' In addition to this, the following supporting permissions have been renamed:

- 'View/Add Vendor/Rebate Payments' is now 'View/Add AP Payment Batch'
- 'Post Vendor/Rebate Payment' is now 'Post AP Payment Batch'
- 'Void Vendor/Rebate Payment' is now 'Void AP Payment Batch'



AR HISTORY						
CURRENT	1-30 DAYS	31-60 DAYS	61-90 DAYS	91-120 DAYS		
0.00	0.00	0.00	0.00	0.00		
<input checked="" type="checkbox"/> Limit to open items	STATEMENT	INVOICE	AUTO APPLY	BALANCE WRITE OFF	WALLET (0)	
DATE	DUE DATE	PERIOD	SITE ID	TYPE	REFERENCE NO	
11/05/24		2024-11		Rebate/Refund Check	200	
11/04/24		2024-11		Payment - Credit Card	5845887	

## AR History

In AR History, 'Rebate Prepayment' has been renamed to 'Rebate/Refund Check.'

## Invoices (Accounts>AR History) - Autopay Message Restored to Display on Invoices (17893)

An issue has been resolved that prevented the auto pay message from displaying on printed invoices. Location of the message may vary across invoice formats.

QA Waste Services  
PO BOX 260310  
legal addr 2  
Corpus Christi, TX 78426



INVOICE # 874519  
ACCOUNT # 18943  
AMOUNT \$ 253.44  
DATE Mar 13, 2023  
DUE DATE AUTO PAY

Pay Online  
Use QUICK PAY CODE 8E761

VINSON LAURA  
752 COUNTY ROAD 6512  
DAYTON, TX 77535-6609

Pay By Check PO BOX 260310-D  
remit addr 2  
Dayton, OH 45134

Enclosed Check # \_\_\_\_\_  
Amount \_\_\_\_\_

For proper credit return this portion

Site 18943001 - VINSON LAURA - 752 COUNTY ROAD 6512 DAYTON, TX 77535						
DATE	DESCRIPTION	WO #	PO #	QTY	RATE	TOTAL
01/01/23 - 01/31/23	Trash Svc - 96 Gallon Cart			1	\$ 33.00 per month	33.00
02/01/23 - 02/28/23	Trash Svc - 96 Gallon Cart			1	\$ 33.00 per month	33.00
03/01/23 - 03/31/23	Trash Svc - 96 Gallon Cart			1	\$ 33.00 per month	33.00
04/01/23 - 04/30/23	Trash Svc - 96 Gallon Cart			1	\$ 33.00 per month	33.00
05/01/23 - 05/31/23	Trash Svc - 96 Gallon Cart			1	\$ 33.00 per month	33.00
06/01/23 - 06/30/23	Trash Svc - 96 Gallon Cart			1	\$ 35.81 per month	35.81
	Fuel Surcharge-Residential					36.57
					Tax	\$ 16.06
					Site Total	\$ 253.44

INVOICE TOTAL \$ 253.44

Current	1-30 Days	31-60 Days	61-90 Days	Over 90 Days	Total Due
253.44	0.00	0.00	0.00	0.00	253.44

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

Automatic Payment of \$253.44 from Visa x5136

## Sales

### Rate Update Batch (Sales) - Screen Updates (17024)

In the Rate Update Batch screen, a 'Created User' field has been added to the 'Created Date' column, and a Net Variance column has also been added.

RATE UPDATE BATCH											SALES > RATE UPDATE BATCHES
+	DIVISION	TYPE	STATUS								
	CORPUS, DAYTON, HEARNE, HILLSBORO, H	All	All								
ID	DIVISION	SERVICE REGION	LINE OF BUSINESS	TYPE	CREATED DATE/ CREATED USER	EFFECTIVE DATE	STATUS	POSTED DATE/ POSTED USER	INC. / EXC.	NOTE	NET VARIANCE
1001	DAYTON	OAKS OF ATASCOCITA	Residential	Service	08/06/21 4:57 pm Ted Fred	09/01/21	Posted	08/06/21 4:59 pm Ted Fred	3 / 825		\$ 2.51
1002	HOUSTON	PEARLAND MUNICIPAL	Commercial	Service	10/27/21 8:40 am Ted Fred	10/01/21	Posted	10/27/21 8:44 am Ted Fred	1567 / 0	All City of Pearland services are no charge	\$(7,393.32)
1003	DAYTON		Commercial	Service	12/31/21 7:34 am Bill Miller	01/01/22	Posted	12/31/21 7:52 am Bill Miller	846 / 0	Annual City of Liberty increase, see letter BK	\$ 2,000.44
1004	CORPUS	CORPUS OPEN MARKET	Roll Off	Svc. Charge	01/03/22 8:29 am Bill Miller	01/01/22	Posted	01/03/22 8:36 am Bill Miller	6 / 241	CEFE Valenzuela 1/1/22 rate increase as notified	\$ 24.50
1005	DAYTON			Service	02/28/22 12:58 pm Bill Miller	04/01/22	Voided		13460 / 0	Forgot to add billgroup filter	
1006	DAYTON			Service	02/28/22 1:01 pm Bill Miller	04/01/22	Posted	03/07/22 9:37 am Ted Fred	13417 / 0	PI Effective 4/1/2022	\$ 5,997.33
1007	DAYTON	OAKS OF ATASCOCITA		Service	05/06/22 10:15 am Bill Miller	06/01/22	Posted	05/06/22 10:31 am Bill Miller	803 / 0	Contractually allowed via 2019 agreement signed. BK	\$ 775.71
1008	DAYTON			Service	06/29/22 3:03 pm Sara Fisher	07/01/22	Posted	07/05/22 3:43 pm David Navarro	345 / 0	PRICE DECREASE 25.00 PER NEW CONTRACT	\$(88.28)
1009	DAYTON	KINGWOOD GREENS		Service	07/27/22 7:25 am Ted Fred	07/01/22	Voided		400 / 0	VOIDED-Have to implement by Bill Group	
1010	DAYTON	KINGWOOD GREENS		Service	07/27/22 11:31 am Ted Fred	07/01/22	Posted	07/27/22 11:37 am Ted Fred	400 / 0	Decreased individual rate, billing HOA for the difference.	\$(1,023.13)
1011	DAYTON			Service	08/13/22 7:40 am Ted Fred	07/01/22	Voided		0 / 663	Failed to Exclude Other Cities	
1012	DAYTON			Service	08/13/22 9:58 am Ted Fred	07/01/22	Posted	08/13/22 10:07 am Ted Fred	663 / 0	Dayton PI-10%-Effective 7/1/22	\$ 4,792.07
1013	HOUSTON	PEARLAND MUNICIPAL		Service	10/03/22 1:37 pm Ted Fred	10/01/22	Posted	10/03/22 1:55 pm Ted Fred	1803 / 943	Pearland Contract PI	\$ 19,268.94

Pathway: Sales > Rate Update Batches

## Rate Update Batch (Sales) - Updates to Voiding a Batch (17608)

Previously, the Reason Code and Net Variance fields were displayed when voiding a batch. With this update, those fields are now hidden, leaving only the Notes field visible.

The screenshot shows the 'SITE SERVICE RATE UPDATE BATCH: 1029' interface. A modal window titled 'VOID RATE UPDATE BATCH' is open, displaying a 'NOTES' field and 'VOID' and 'CANCEL' buttons. The background grid lists various sites with columns for SITE ID, NAME, CITY, SERVICE CODE, CURRENT RATE, NEW RATE, VARIANCE, and CURRENT WO MINIMUM. The bottom of the screen shows '53 records / 0 selected / 53 visible' and buttons for EXPORT, IMPORT, POST, VOID, and CLOSE.

Pathway: Sales > Rate Update Batch

## Rate Update Batch (Sales) - New 'Book of Business' Grid View Added (17763)

A new 'Book of Business' grid view option has been added to both the Service and Service Charge rate update batch types.

The screenshot shows the 'RATE UPDATE BATCH' interface. A modal window titled 'SITE SERVICE RATE UPDATE BATCH: 1013' is open, displaying a 'GRID VIEW' dropdown menu with 'Book of Business' selected. The background grid lists various sites with columns for ID, DIVISION, SERVICE REGION, LINE OF BUSINESS, TYPE, and CREATED DATE/CREATED USER. The bottom of the screen shows 'NET VARIANCE \$19,268.94' and 'EFFECTIVE DATE 10/01/2022'.

Pathway: Sales > Rate Update Batches

## Rate Update Batch (Sales) - Charge Code Selection Not Displaying (17801, 18006)

An issue has been resolved that prevented charge codes from populating for selection, and the logic has been corrected to prevent a batch from showing 0 records after creation.

ADD SITE SERVICE CHARGE RATE UPDATE BATCH

DIVISION: QAWASTE  
 SERVICE REGION: Bunn NC, Delete  
 LINE OF BUSINESS: Commercial, Docu  
 ACCOUNT CLASS: AUTOCH, BROKE  
 SITE CLASS: COM, RO  
 BILL GROUP: Anniversary 4 we

CHARGE CODE: Select Charge Code(s)  
 Account Class Fee 2  
 ACH Fee  
 Adjustment  
 Adjustment-Commercial  
 Adjustment-Residential  
 Adjustment-Roll Off  
 Admin charge-bill zero amount  
 AR Adjustment  
 Bad Debt Recovery  
 Bulk Pickup  
 Bulk Pickup  
 Bulk Pickup  
 Cancel Fee

EFFECTIVE DATE:   
 MONTHS AT CURRENT RATE:

SITE ID	NAT	TY	CHARGE CODE	CURRENT RATE	NO CHARGE QUANTITY	ACCOUNT CLASS	BILL GROUP
SITE SERVICE CHARGE RATE UPDATE BATCH: 1080							
GRID VIEW: Standard		CHANGE TYPE: %		AMOUNT: 0.0000	NET VARIANCE: \$0.00		EFFECTIVE DATE: 02/27/2025
<input type="checkbox"/>							
<input checked="" type="checkbox"/>			49046001	Boba Junkie Fountain Valley	Fountain Valley	38209	Adjustment-Roll Off \$ 35.00 0
<input checked="" type="checkbox"/>			49096001	Food4Less	Los Angeles	38382	Adjustment-Commercial \$ 35.00 0
<input checked="" type="checkbox"/>			49096002	Eleven Bakery	Monterey Park	38382	Adjustment-Commercial \$ 35.00 0
<input checked="" type="checkbox"/>			49110001	Amy's Hallmark Shop	Arcadia	38380	Adjustment-Commercial \$ 35.00 0

4 records / 4 selected / 4 visible

Pathway: Sales > Rate Update Batches

## Operations

### Edit Disposal / Shipment (Operations) - Disposal Tickets Entered in NavuNav Not Displaying In Dispatch Disposal Records (16806)

An issue has been resolved where Disposal Records created in NavuNav were not being calculated into the Disposal Rate field when viewed in Navusoft.

EDIT DISPOSAL / SHIPMENT

Route Disposal: HOU 202

INTERNAL TICKET # 41345

TRANSPORT METHOD: Truck  
 TRUCK: 2001

EXTERNAL TICKET #  
 STATUS: Completed

DESTINATION / ORIGIN: HOMEBASE

MATERIAL: MSW

NOTES

Weights  
 WEIGHT IN:  ton  
 WEIGHT OUT:  ton  
 NET:  ton

START: 07/12/24 Fri 07:56:00.000  
 END:

QTY: 10000 ton

DISPOSAL RATE	20.0000
FEE 1 - FLAT	50.00
FEE 2 - FLAT	60.00
<b>TOTAL COST</b>	<b>200000.00</b>

Ticket Image

Include Ticket Image With Invoice and make available in customer portal

## Driver Timeline (Operations/Dispatch) - Modifications Applied to the Driver Timeline Screen (17304) [New Feature]

Review the enhancements made to the Driver Timeline screen in Dispatch, as well as some of the updated views within Dispatch.

The screenshot shows the DISPATCH interface for a driver named RES101 on August 2, 2024. The interface includes a header with filters for FROM (08/02/24), TO (08/02/24), DIVISION (QAWASTE), and LINE OF BUSINESS (Residential). Below this is a table with columns for ROUTE, TRUCK, DRIVER, and DESTINATION. A red arrow points to the driver ID 'RES101' in the driver list. A pop-up window titled 'TEST2 DISPATCHER USER - DISPATCH (OPERATIONS) ON AUG 02, 2024 - RES101' is open, showing a detailed timeline of service events. The timeline includes a log in at 10:58 am, a failure at 10:58 am, and several service completions between 11:29 am and 12:04 pm. A map on the right side of the pop-up shows the service area with various locations marked. The pop-up also includes summary statistics for SCHEDULED, COMPLETED, PENDING, DO NOT SERVICED, and EXCEPTIONS, along with a 'CHECK IN' button and a 'PREVIEW ROUTE SEQUENCE USING COMPLETION ORDER' button.

## Additional Items Added to Menu Options

New selection options include:

- Set Driver Log In / Out
  - Upon selection, the *Worker Daily Productivity* window opens.
- Set Truck Odometer
  - Upon selection, the *Update Truck Odometer* window opens.
- Add Fuel
  - Upon selection, the *Fuel Record* window opens.

The screenshot shows the DISPATCH interface for a driver named RES101 on August 2, 2024. A menu is open over the timeline, listing options: Set Driver Log In / Out, Set Truck Odometer, Add Disposal, Add Downtime, and Add Fuel. The background shows the same driver timeline and map as the previous screenshot.

## Display of Stop Counts

Stop counts have been updated to include the same counts displayed on the Dispatch screen. Similar to the Dispatch screen, clicking the hyperlink for a count will open the Services List.

TEST2 DISPATCHER USER - DISPATCH (OPERATIONS) ON AUG 02, 2024 - RES101

TYPE: Completed Work Order, Downtime

SCHEDULED	COMPLETED	PENDING	DO NOT SERVICED	EXCEPTIONS
16	13	0	3	0

HOURS	DOWNTIME	DISTANCE	FUEL	PRE-TRIP	POST-TRIP
9.5	0.4 (1)	152 mi	50 G	Fail	Incomplete

TIME	SEQ	LOCATION	REFERENCE #	QTY	NOTE
10:58 am			Log In	10500.0	
10:58 am			FAIL		
11:29 am 17 mins	14	8039 Loren Ln 8039 Loren Ln Rosemead, CA 91770-3986	7999456	1	Service Completed
11:33 am 27 mins	16	8027 Loren Ln 8027 Loren Ln	7999453	1	

## Route Data

Route data has been relocated to the top of the screen and has been expanded to include:

- **Downtime**
  - The first value represents the sum of hours and the value in parenthesis represents the number of downtime entries.
- **Pre-Trip**
  - Displays the Pass/Fail results as a hyperlink to the *Vehicle Inspection Results* screen.
- **Post-Trip**
  - Displays the Pass/Fail results as a hyperlink to the *Vehicle Inspection Results* screen.

TEST2 DISPATCHER USER - DISPATCH (OPERATIONS) ON AUG 02, 2024 - RES101

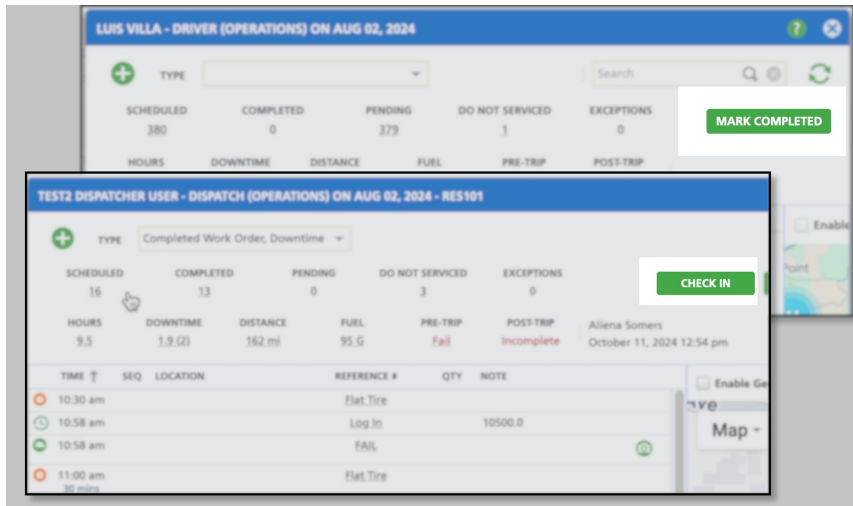
TYPE: Completed Work Order, Downtime

SCHEDULED	COMPLETED	PENDING	DO NOT SERVICED	EXCEPTIONS
16	13	0	3	0

HOURS	DOWNTIME	DISTANCE	FUEL	PRE-TRIP	POST-TRIP
9.5	0.4 (1)	152 mi	50 G	Fail	Incomplete

TIME	SEQ	LOCATION	REFERENCE #	QTY	NOTE
10:58 am			Log In	10500.0	
10:58 am			FAIL		
11:29 am 17 mins	14	8039 Loren Ln 8039 Loren Ln Rosemead, CA 91770-3986	7999456	1	Service Completed
11:33 am 27 mins	16	8027 Loren Ln 8027 Loren Ln	7999453	1	

## Mark Completed/Check In



### Mark Completed

- Only displays if the route record statuses are 'Scheduled' or 'In Progress.'
- When clicked, all associated route record statuses are updated to 'Completed,' and the action button changes to 'Check In.'

### Check In

'Check-In' allows dispatchers to mark routes as reviewed, logging their name and a timestamp to confirm thorough examinations and reinforce accountability.

- Only displays when all route record statuses are marked 'Completed.'
- Upon click, the check-in completion timestamp and user ID are recorded.

## Dispatch Screen Changes

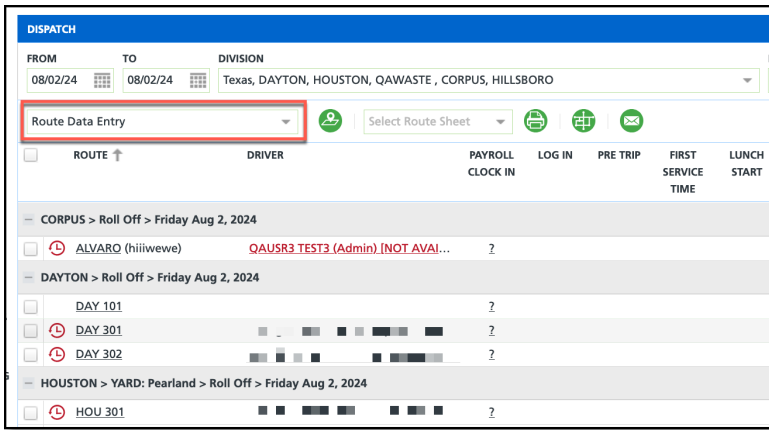
### Timeline Icons

Color Variations:

- **Red:** Route's status is 'In Progress' or 'Completed' but Log In time is missing and the driver check in timestamp is blank.
- **Green:** Driver check in is completed and timestamp is populated.
- **Blue:** Default color
- **Orange:** Route status is completed but the driver check in timestamp is blank.

<input type="checkbox"/>		<u>HOU 412</u>	<u>5019</u>
<input type="checkbox"/>		<u>HOU 501</u>	<u>5017</u>
<input type="checkbox"/>		<u>HOU 502</u>	<u>5010</u>
<input type="checkbox"/>		<u>HOU 503</u>	<u>5011</u>
<input type="checkbox"/>		<u>HOU 505</u>	<u>5011</u>
- QAWASTE > Residential > Friday Aug 2, 2024			
<input type="checkbox"/>		<u>RES101</u>	<u>LA-1</u>

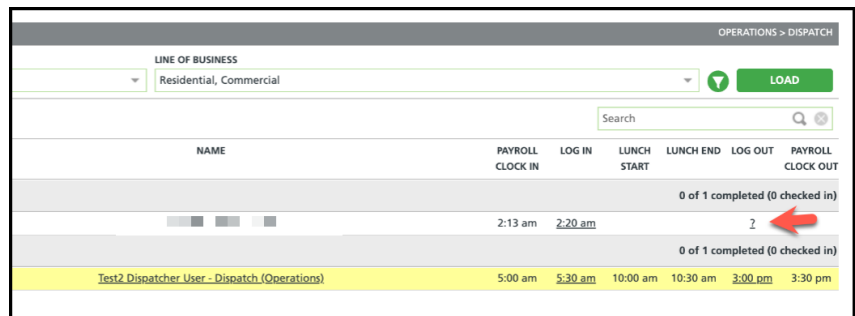
### Route Data Entry



The Route Productivity view has been renamed to 'Route Data Entry'.

### Log In and Log Out

If a route record is missing log-in or log-out times, a '?' link will appear. Clicking the link opens the *Worker Daily Productivity* screen, allowing for the entry of log-in and log-out times.



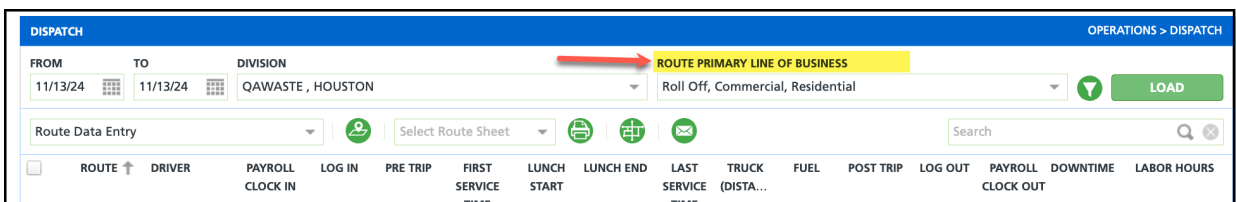
### Truck (Distance)

LUNCH END	LAST SERVICE TIME	TRUCK (DISTANCE)	FUEL	POST TRIP	LOG OUT	PAYROLL CLOCK OUT	DOWNTIME	LABOR HOURS
0 of 1 completed (0 checked in)								
		Alvaro ( 193.1 km)	0		3:00 pm	?	0 (0)	0
0 of 3 completed (0 checked in)								
		771 ( 0 km)	0			?	0 (0)	0
			0			?		0
0 of 2 completed (0 checked in)								
		4002 ( 0 km)	0			?	0 (0)	0
		4000 ( 0 km)	0			?	0 (0)	0
0 of 1 completed (0 checked in)								
		4009 ( 0 km)	0			?	0 (0)	0

In the *Route Data Entry* view, the 'Truck Odometer' column has been renamed to 'Truck (Distance),' with the distance displayed in parentheses using the appropriate unit of measure (UOM).

### Dispatch (Operations) - 'Line of Business' Label Renamed (17531)

In Dispatch, the Line of Business label has been renamed to 'Route Primary Line of Business.'



HOUSTON > YARD: HOMEBASE > Commercial > Wednesday Nov 13, 2024							0 of 5 completed (0 checked in)			
<input type="checkbox"/>		HOU 201		Alicia J...	?	2003...	0	?	0 (0)	0
<input type="checkbox"/>		HOU 202		Ismael...	?		0	?		0
<input type="checkbox"/>		HOU 203		David S...	?	2002...	0	?	0 (0)	0
<input type="checkbox"/>		HOU 204		Greg E...	?	2000...	0	?	0 (0)	0
<input type="checkbox"/>		HOU 206		Michae...	?	2004...	0	?	0 (0)	0
HOUSTON > YARD: HOMEBASE > Residential > Wednesday Nov 13, 2024							0 of 1 completed (0 checked in)			
<input type="checkbox"/>		HOU 504		Jonathan...	?		0	?		0
HOUSTON > YARD: HOMEBASE > Roll Off > Wednesday Nov 13, 2024							0 of 1 completed (0 checked in)			

Pathway: [Operations](#) > [Dispatch](#)

## Route Management (Operations) - Display of Route Number on Map (17537)

The Route Management map now displays the route number alongside the corresponding day of the week for each stop.

44928001 Cole's Flea Market	1014 N Main St Pearland, TX 77581-2208
47567001 The Center at Pearland Parkway	2470 Pearland Pkwy Pearland, TX 77581
46527001 MCDONALDS	2122 N Main St Pearland, TX 77581

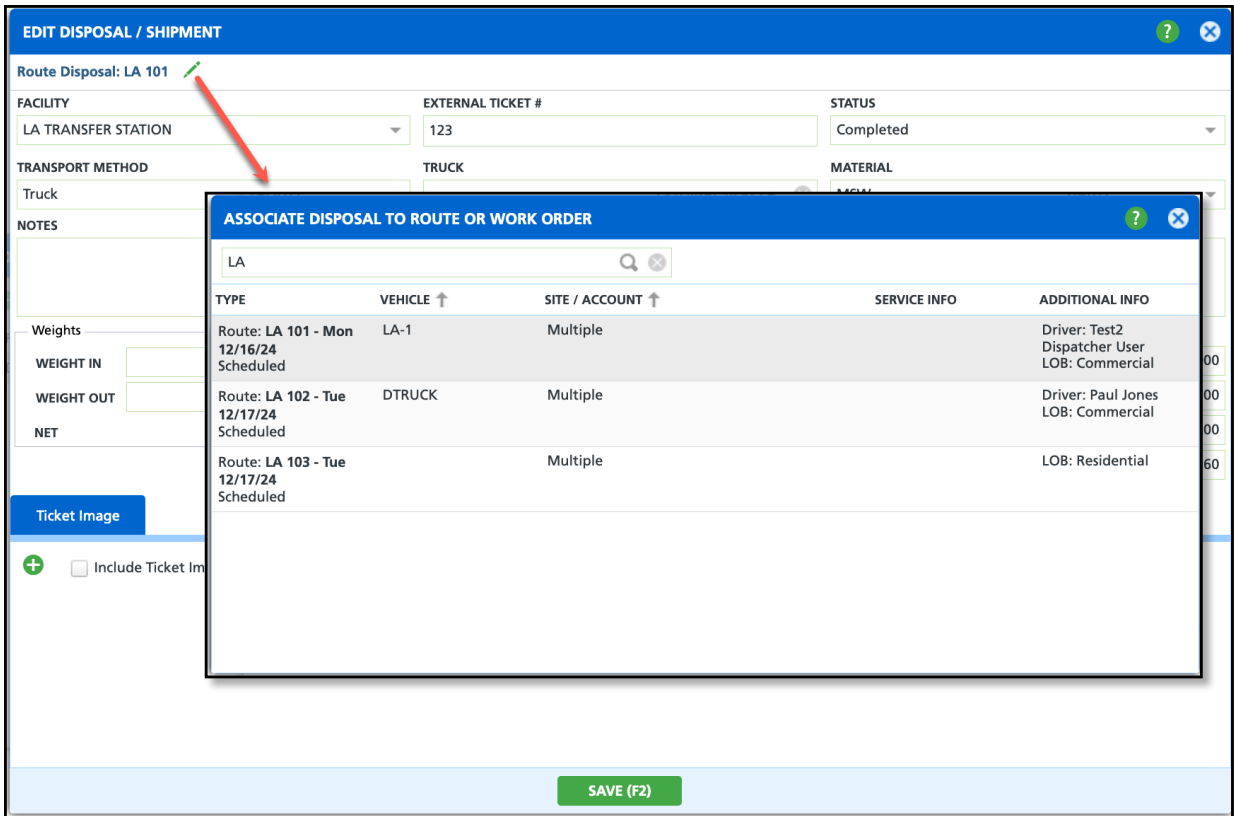
MAP TYPE: Route Day of Week | DAY OF WEEK: Tue, Thu | DISPLAY ALL LINES OF BUSINESS:

Pathway: [Operations](#) > [Route Management](#)

## Dispatch (Operations) - Edit Route Updates for Disposal Records (15174)

The disposal record has been enhanced with the following features:

- **Edit Completed Disposal Tickets:** The ability to edit a disposal ticket for a route with a completed status.
- **Reassign Disposal Tickets:** The ability to reassign a disposal ticket to a different route, as illustrated in the image below.



Pathway: *Operations > Dispatch*

## Dispatch (Operations) - Updates to Context Menu Actions (17440)

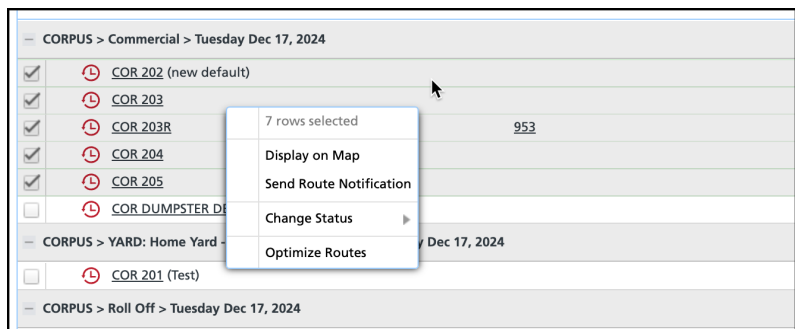
The following enhancements have been applied to the Dispatch screen:

### Left and Right-Click Enhancements

**Left-click** anywhere within a row (that is not a link) and it will cause the selection of the row.

**Right-click** anywhere within a row and the following logic applies:

- If the row is already selected, the context menu is displayed.
- If the row is not already selected, all previous selections will be cleared, and only the right-clicked row will remain selected and the Context Menu displayed.



Select All / Deselect All Checkbox Indicator

	ROUTE ↑	TRUCK
CORPUS > Commercial > Tuesday Dec 17, 2024		
<input checked="" type="checkbox"/>	COR_202 (new default)	
<input checked="" type="checkbox"/>	COR_203	
<input type="checkbox"/>	COR_203R	953
<input checked="" type="checkbox"/>	COR_204	
<input checked="" type="checkbox"/>	COR_205	
<input type="checkbox"/>	COR_DUMPSTER DEL/REM	

An indicator will display based on the selection status of the check boxes:

- **None selected:** The box is empty.
- **Some selected:** A dash indicator is shown.
- **All selected:** A check mark is displayed.

### Context Menu Updates

If multiple rows are selected, the Context Menu will display the number of selected rows along with the following new menu options:

- Display on Map
- Send Route Notification
- Optimize Routes

	ROUTE ↑	TRUCK
CORPUS > Commercial > Tuesday Dec 17, 2024		
<input checked="" type="checkbox"/>	COR_202 (new default)	
<input checked="" type="checkbox"/>	COR_203	
<input type="checkbox"/>	COR_203R	
<input checked="" type="checkbox"/>	COR_204	
<input checked="" type="checkbox"/>	COR_205	
<input type="checkbox"/>	COR_DUMPSTER DEL/REM	
CORPUS > YARD: Home Yard - Corpus > Commercial > Tuesday Dec 17, 2024		

6 rows selected

- Display on Map
- Send Route Notification
- Change Status ▶
- Optimize Routes

### Inbound Orders (Accounts) - Inbound Orders not Calculating Percent Surcharges (18001)

Inbound tickets were previously not calculating the percentage surcharge for charge codes. This has been resolved.

**EDIT SERVICE RECORD**

Site # 48921001	TICKET NUMBER 41584	WORK ORDER 9309046	QTY 1	SERVICE CODE Scale Inbound Services	WORK TYPE SCALE_POST	ORDER TYPE Inbound / Receiving
-----------------	---------------------	--------------------	-------	-------------------------------------	----------------------	--------------------------------

Scale Test  
NAME 2 ✓  
8100 Washington Ave  
Houston, TX 77007  
COD - Payment Required  
CREATED BY Paul Gonzalez - QA Expert (Admin) on 3/5/25 10:55 am  
ORDER REASON

SITE NOTE This is a Site Note  
SVC NOTE Watch for extras hidden behind the seat

TRUCK SCALETRK3	VEHICLE INFO	PO NUMBER	EXTERNAL ID
RECEIVING FACILITY HOMEBASE	MATERIAL MSW		
TRANSPORTER	TRANSPORT METHOD Truck	BILL OF LADING	
WORK STATUS In Progress	EXCEPTION REASON	POSTING STATUS Pending	

Weights				CHARGES \$ 50.00	
GROSS / IN	lbs	START 03/05/25 Wed	10 : 55 : 00 . 000 A	SURCHARGES \$ 9.66	
TARE / OUT	10 lbs	END	-- : -- --	TAXES \$ 3.38	
NET	lbs	Adjust		TOTAL \$ 63.04	

Charges \$ 50.00 3 | Payments | Origins | Diversion / LEED | Completion | Attachments | Photos

Charges must match Equipment |  Charges must match Material | WO MINIMUM

GROSS QTY	LABELS	NO CHARGE QTY	CHARGE QTY	UOM	CHARGE CODE	PER UNIT	VENDOR RATE	MINIMUM TYPE	MINIMUM	TOTAL
0		0	0	each	Tires	\$ 30.00		None		\$ 0.00
0		0	0	ton	Construction and Demolition	\$ 56.00		None		\$ 0.00
1		1	1	ton	Trash	\$ 50.00		None		\$ 50.00

Pathway: Operations > Inbound/Outbound

## Dispatch (Operations) - Site Hyperlink Added to Edit Service Record (17666) [New Feature]

The Site ID hyperlink has been enabled on the *Edit Service Record* screen from the Dispatch Services list. Clicking the hyperlink opens the site in the *Customer Service* screen, which will also include a back button to return to the Services List screen.

**EDIT SERVICE RECORD**

Site # <a href="#">46815001</a> <b>MOORE PLAZA</b> 5425 S Padre Island Dr Corpus Christi, TX 78411  CREATED BY David Navarro - Admin-NS (Admin) on 11/8/24 3:55 am  ORDER REASON <input type="text"/>	<table style="width: 100%; border-collapse: collapse;"> <tr> <td>WORK ORDER</td><td>QTY</td><td>SERVICE CODE</td><td>EQUIPMENT</td><td>WORK TYPE</td><td>ORDER TYPE</td></tr> <tr> <td>8703760</td><td>1</td><td>6 Yard Trash Service (137323)</td><td>6YD</td><td>FL_SERVICE</td><td>Scheduled Service</td></tr> </table> ORDER NOTES <input style="width: 100%;" type="text"/>  PO NUMBER      EXTERNAL ID <input style="width: 50%;" type="text"/> <input style="width: 50%;" type="text"/>  SCHEDULED DATE      ROUTE      SEQUENCE      DESTINATION / ORIGIN 12/23/24 Monday      COR 203 - Marco Hurtado      0 <input style="width: 100%;" type="text"/>  WORK STATUS      EXCEPTION REASON      POSTING STATUS Scheduled <input style="width: 50%;" type="text"/> Pending	WORK ORDER	QTY	SERVICE CODE	EQUIPMENT	WORK TYPE	ORDER TYPE	8703760	1	6 Yard Trash Service (137323)	6YD	FL_SERVICE	Scheduled Service
WORK ORDER	QTY	SERVICE CODE	EQUIPMENT	WORK TYPE	ORDER TYPE								
8703760	1	6 Yard Trash Service (137323)	6YD	FL_SERVICE	Scheduled Service								

Charges
Payments
Completion
Lab Tests
Attachments
Labels
Photos

Charges must match Equipment  
 Charges must match Material

WO MINIMUM

CALCULATE LAB QTY AN

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

## Services List (Operations) - Checkbox Selection and Context Menu Updates (17363)

The following enhancements have been applied to the Services List screen:

### Left and Right-Click Enhancements

**Left-click** anywhere within a row (that is not a link) and it will cause the selection of the row.

**Right-click** anywhere within a row and the following logic applies:

- If the row is already selected, the context menu is displayed.
- If the row is not already selected, all previous selections will be cleared, and only the right-clicked row will remain selected and the Context Menu displayed.

**SERVICES LIST**

Dispatch
Select Print Format
PRINT COMPLETED

ROUTE	SEQ ↑	ORDER NOTE	LOCATION	SCHEDULED DATE ↑	CREATED ON	WO#
<input checked="" type="checkbox"/>	DAY 202		44560001 Kingwood - Freebirds 3112 W Lake Houston Pkwy, Houston	Wed 1/8/25	11/24/24 3:55am	8794323
<input checked="" type="checkbox"/>	DAY 202		46034001 * Veratex Gas Group LLC 18574 Van Rd, Houston	Wed 1/8/25	11/24/24 3:55am	8794327
<input checked="" type="checkbox"/>	DAY 202		46620001 SHIELD WASTE CONSULTANTS 8411 Humble Westfield Road, Humble	Wed 1/8/25	11/24/24 3:55am	8794329
<input checked="" type="checkbox"/>	DAY 202		47760001 Lee Insurance Agency 8727 FM 1960, Humble	Wed 1/8/25	11/24/24 3:55am	8794333
<input checked="" type="checkbox"/>	DAY 202		48202001 Amazing Living HCS 304 Wilson Rd, Humble	Wed 1/8/25	11/24/24 3:55am	8794335
<input type="checkbox"/>	DAY 202		48614001 Honeybee Ham 9638 Farm to Market 1960 Bypass Rd W, Humble	Wed 1/8/25	11/24/24 3:55am	8794337

Select All / Deselect All Checkbox Indicator

ROUTE	SEQ ↑	ORDER NOTE	LOCATION	SCHEDULED DATE ↑	CREATED ON	WO#
DAY 202						
DAY 202						
DAY 202						
DAY 202						
DAY 202						
DAY 202						
DAY 202						
DAY 202						
DAY 202						
DAY 202						

An indicator will display based on the selection status of the check boxes:

- **None selected:** The box is empty.
- **Some selected:** A dash indicator is shown.
- **All selected:** A check mark is displayed.

### Context Menu Updates

If multiple rows are selected, the Context Menu will display the number of selected rows along with the following new menu options:

- Display on Map
- Send Service Notification
- Change Posting Status

ROUTE	SEQ ↑	ORDER NOTE	LOCATION	SCHEDULED DATE ↑	CREATED ON	WO#
COR 203			42556001 * SALVATION ARMY OF THE COASTAL BEND 1804 BUFORD STREET, CORPUS CHRISTI	Wed 1/8/25	11/24/24 3:55am	8794006
COR 203			47987001 * Birdwell A/C and Heating 4410 Dillon Ln, Corpus Christi	Wed 1/8/25	11/24/24 3:55am	8794064
COR 2			48073001 Josy VanZant 2803 FM763, Corpus Christi	Wed 1/8/25	11/24/24 3:55am	8794074
COR 2			46810001 * Corpus Christi Produce 238 N Port Ave, Corpus Christi	Wed 1/8/25	11/24/24 3:55am	8794080
COR 2			48201001 Studio 44, LLC 817 N Carancahua St, Corpus Christi	Wed 1/8/25	11/24/24 3:55am	8794121

ROUTE	SEQ ↑	ORDER NOTE	LOCATION	SCHEDULED DATE ↑	CREATED ON	WO#	WO TYPE	SERVICE TYPE	QTY	EQUIPME	PHOTOS
COR ...			42556001 * SALVATION ARMY OF THE COASTAL BEND 1804 BUFORD STREET, CORPUS CHRISTI	Wed 1/8/25	11/24/24 3:55am	8794006	Scheduled Service	FL Service	1	8 Yard FL	
COR ...			47987001 * Birdwell A/C and Heating 4410 Dillon Ln, Corpus Christi	Wed 1/8/25	11/24/24 3:55am	8794064	Scheduled Service	FL Service	1	7 Yard FL	
COR ...			48073001	Wed 1/8/25	11/24/24 3:55am	8794074	Scheduled	FL	1	4 Yard FL	

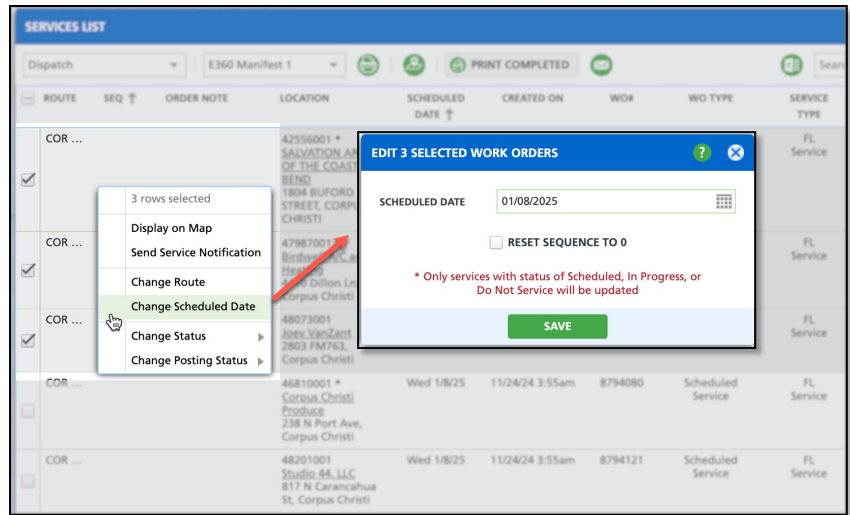
### Toolbar Updates

The following updates have been made to the toolbar:

- The **Set Posting** button has been removed
- The **Edit** button has been removed

### Edit Service Records

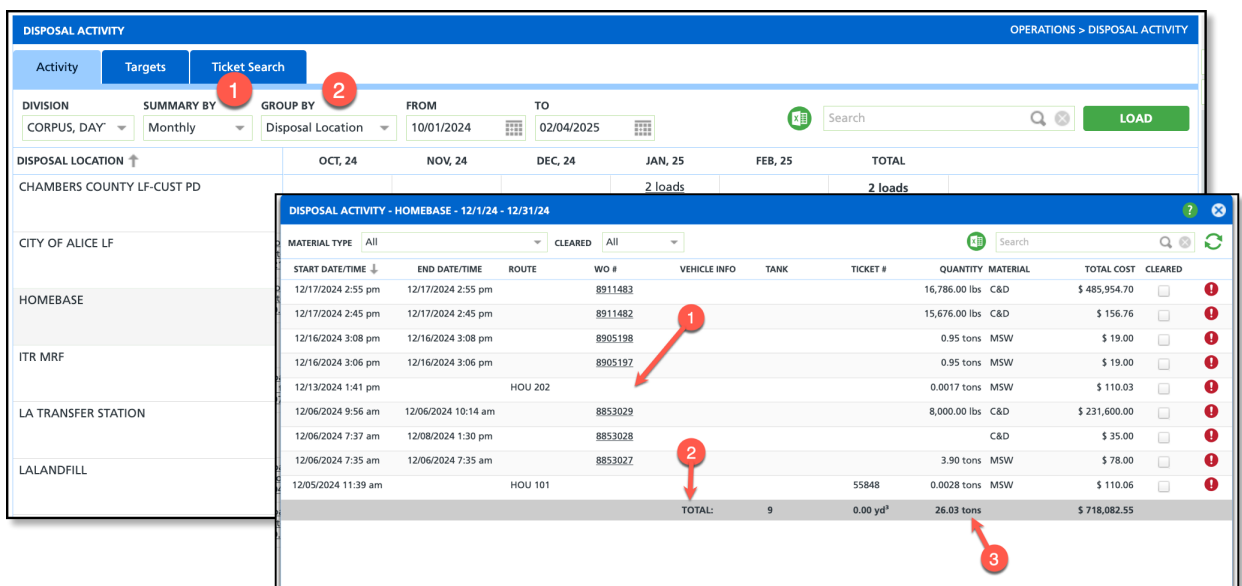
The "Edit Service Record" option has been removed from the context menu. Its functions remain accessible through the "Change Route" and "Change Scheduled Date" options. Additionally, a "Reset Sequence to 0" feature has been added to the popup editor for both options.



### Disposal Activity (Operations) - Updates to the Activity and Details Screens (15934)

The following updates have been applied to the **Activity** tab in Disposal Activity, and the **Details** screen, accessible by clicking on a summary link:

- **Activity** tab updates:
  - The original 'Group By' drop down option has been renamed to "Summary By."
  - A new 'Group By' has been added with options:
    - Disposal Location, Line of Business and Route
- **Details** screen improvements:
  - If a work order does not exist, the column will display blank. Previously, this displayed a 'null' hyperlink value.
  - The Total row has been reformatted to enhance the display of column totals.
  - The weight summary value and its unit of measure are now displayed together in the total column.



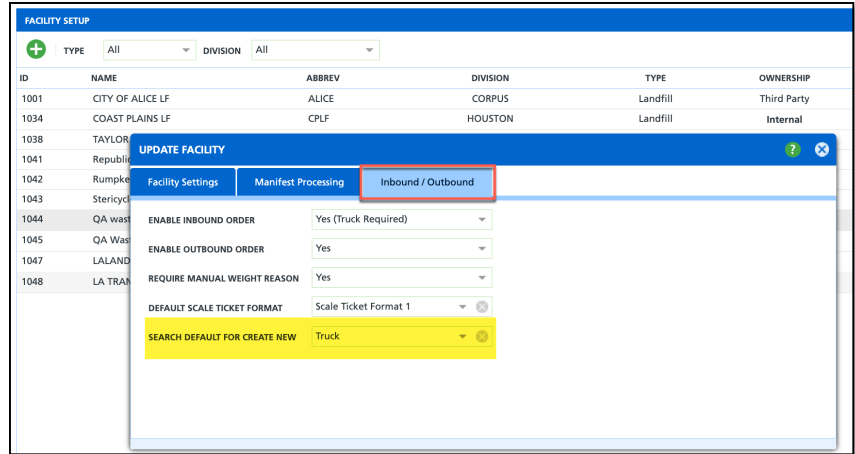
Pathway: Operations > Disposal Activity

### Inbound/Outbound (Operations) - New Search Type Setting and Logic Update (17935)

A setting to default the Search Type has been added to the Facility Setup screen. When this setting is enabled, the search type value is automatically populated for new transactions. If the setting is not enabled, the search type value remains blank.

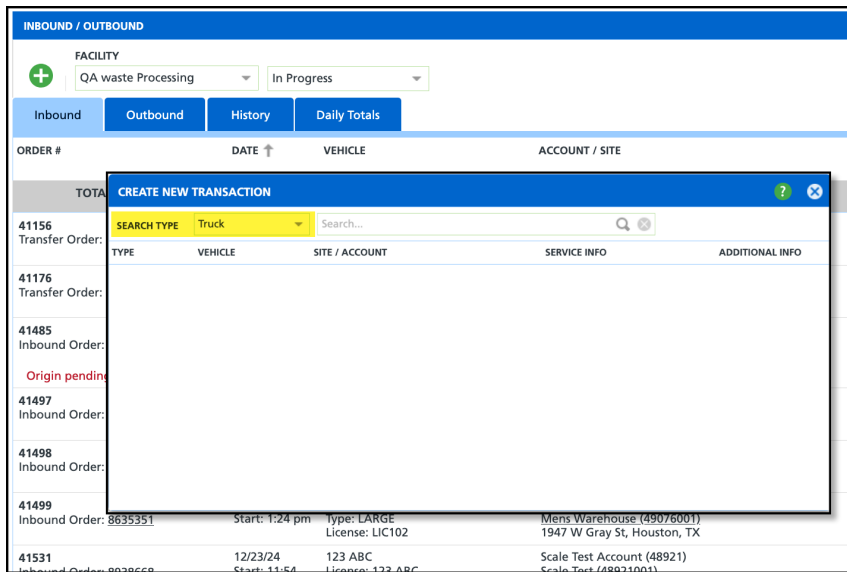
## Facility Setup - Establish Default Setting

The default setting for the Search Type drop down in the Inbound/Outbound screen is configured in Facility Setup.



## Inbound/Outbound - Search Type

If a facility has a default search setting enabled, it will automatically populate when a new transaction is created.



**Pathway:** Setup > Operations > Facility > Inbound/Outbound [tab] | Operations > Inbound/Outbound > Create New Transaction [Add icon]

## Route Management (Operations) - Export and Import Logic Updated (17856)

In the Route Management Current tab, the Import and Export logic for both format options (Navusoft and RouteSmart) has been updated to use Route ID instead of Route Name. To support this, Route ID was added to the Route Setup screen (Setup > Operations > Route) and the following changes were made to the Navusoft Format and RouteSmart Format:

- Navusoft Format
  - Addition of Route ID column to Export file
- RouteSmart Format
  - Addition of three new columns to Export file:
    - New Day, New Route and New Sequence

Pending	Current	Re-Number					
HOUSTON	HOUSTON OPEN MARKET	Commercial	HOU 201, HOU 202, F	Monday, Tuesday, Wed	LOAD	EXPORT	IMPORT
EDIT	MAP	Route Summary	Reset Sequence to 0 on Reroute / Reschedule				
QTY	SITE	SERVICE CODE	FREQ / NEXT SVC	ROUTE	SEQ ↑	DOW	
1	43890002 COP - SHADOW CREEK RANCH SPORT 13050 SHADOW CREEK PKWY PEARLAND, TX 77584-7458	8 Yard Trash Service 8 Yard FL MSW	1x per week 02/19/25 Week 8	HOU 201	0	Wed	
1	44892001 DERRICK'S CHRISTMAS TREES 10904 Memorial Hermann Drive Pearland, TX 77584-2184	6 Yard Trash Service 6 Yard FL MSW	2x per week 02/25/25 Week 9	HOU 201	0	Tue	
1	43890032 COP - WEST PEARLAND LIBRARY 11801 Shadow Creek Parkway Pearland, TX 77584	4 Yard Trash Service 4 Yard FL MSW	2x per week 02/25/25 Week 9	HOU 201	0	Tue	
2	43890001 COP - FIRE STATION #8 12255 SHADOW CREEK PEARLAND, TX 77584	4 Yard Trash Service 4 Yard FL MSW	1x per week 02/19/25 Week 8	HOU 201	0	Wed	

Pathway: Operations > Route Management > Current [tab] | Setup > Operations > Route

### Services List (Operations) - Infrequent Issue Prevented Display of Stops (18024)

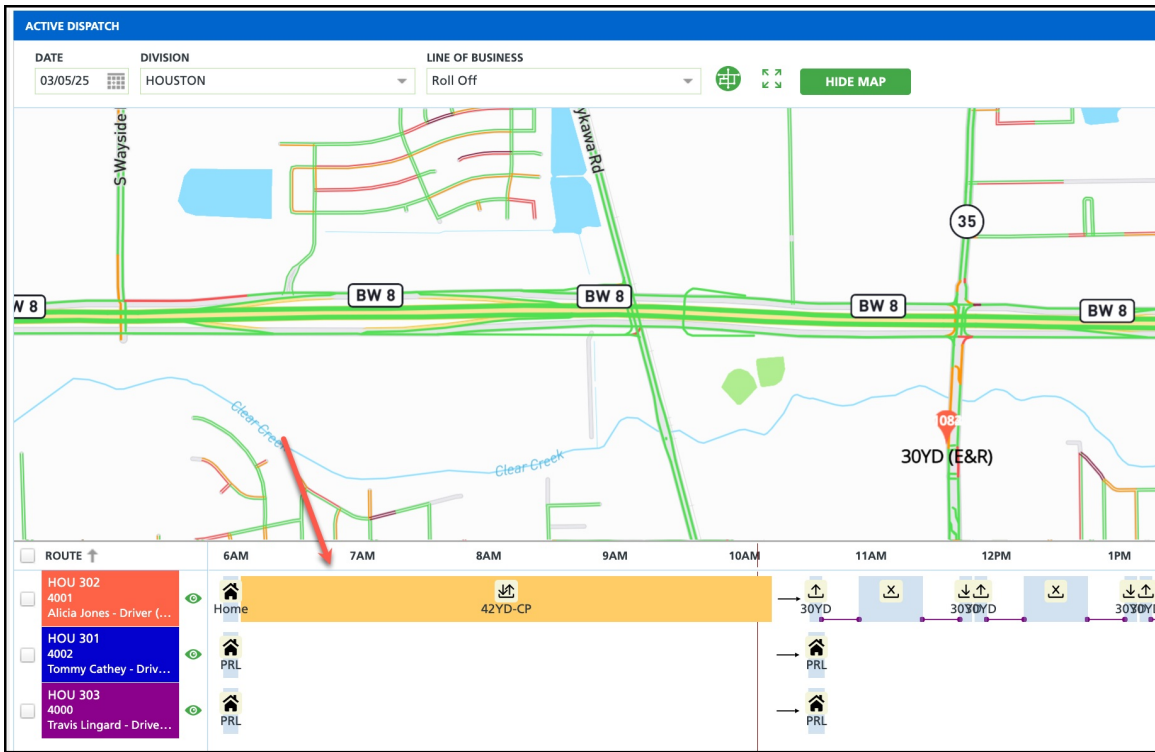
In rare cases, stops did not display when NavuNav provided invalid latitude and longitude values for services marked as completed or with an exception. This issue has been identified and resolved.

SERVICES LIST							
Dispatch	Select Print Format	PRINT COMPLETED					
ROUTE	SEQ ↑	ORDER NOTE	SITE	SCHEDULED DATE ↑	CREATED ON	WO#	WO TYPE
HOU 101			45358013 WED 101 3519 Liberty Dr, Pearland	Wed 3/5/25	1/19/25 3:55am	9062823	Scheduled Service COMPLETED
HOU 101			45358013 WED 101 3519 Liberty Dr, Pearland	Wed 3/5/25	1/19/25 3:55am	9062824 *	Scheduled Service COMPLETED
HOU 101			45358013 WED 101 3519 Liberty Dr, Pearland	Wed 3/5/25	1/19/25 3:55am	9062827 *	Scheduled Service COMPLETED
HOU 101			45358013 WED 101 3519 Liberty Dr, Pearland	Wed 3/5/25	1/19/25 3:55am	9062864 *	Scheduled Service COMPLETED
HOU 101			45358013 WED 101 3519 Liberty Dr, Pearland	Wed 3/5/25	1/19/25 3:55am	9062869 *	Scheduled Service COMPLETED
HOU 101			45358013 WED 101 3519 Liberty Dr, Pearland	Wed 3/5/25	1/19/25 3:55am	9063660 *	Scheduled Service COMPLETED
HOU 101			45358013 WED 101 3519 Liberty Dr, Pearland	Wed 3/5/25	1/19/25 3:55am	9063678 *	Scheduled Service COMPLETED
HOU 101			45358013 WED 101 3519 Liberty Dr, Pearland	Wed 3/5/25	1/19/25 3:55am	9064521 *	Scheduled Service COMPLETED

Pathway: Operations > Dispatch

### Active Dispatch (Operations) - Display of Work Orders with Exceptions (17970)

Screen logic has been updated to display work orders marked with an exception on the left side of the timeline.

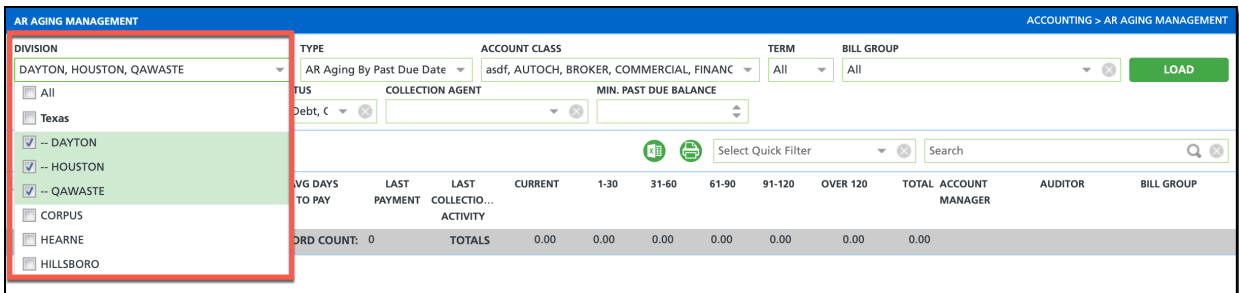


Pathway: *Operations > Active Dispatch*

## Accounting

### AR Aging Management (Accounting) - Multi-Select Added to Division Filter (17018)

In AR Aging Management, the Division filter was enhanced to support the selection of multiple divisions.



Pathway: *Accounting > AR Aging Management*

### AR Aging Management (Accounting)- Ability To Change Account Status Of Multiple Accounts (16999) [New Feature]

An enhancement has been made to AR Aging Management, adding the option to select multiple accounts when changing account statuses.

AR AGING MANAGEMENT														ACCOUNTING > AR AGING MANAGEMENT					
DIVISION		TYPE		ACCOUNT CLASS			TERM		BILL GROUP										
Texas, DAYTON, HOUSTON, QAWASTE		AR Aging By Past Due Date		asdf, AUTOCH, BROKER, CLASSTEST, COMMERC			All		All			LOAD							
ACCOUNT MANAGER		ACCOUNT STATUS		COLLECTION AGENT			MIN. PAST DUE BALANCE												
		Active, Bad Debt, C																	
Account Information														Select Quick Filter			Search		
ACT ID	ACCOUNT NAME	STATUS	AVG DAYS TO PAY	LAST PAYMENT	LAST COLLECTION ACTIVITY	CURRENT	1-30	31-60	61-90	91-120	OVER 120	TOTAL	ACCOUNT MANAGER	AUDITOR	BILL GROUP				
RECORD COUNT: 12754						TOTALS -162,333.23						0.00 1,031,282. 1,014,582. 1,050,182. 14,444,676.0 17,378,390.0							
<input type="checkbox"/>	18827	JANNISE MARTY &...	Active	5	10/27/22	0.00	0.00	0.00	0.00	0.00	149.45	149.45	House Account	(Inactive)	DAY-RESI MON...				
<input checked="" type="checkbox"/>	18829	NORMA PARADA	Active	3	10/27/22	0.00	0.00	0.00	0.00	0.00	219.60	219.60	House Account	(Inactive)	DAY-Q1-JAN-A...				
<input checked="" type="checkbox"/>	18845	THOMPSON LAUR...	Active	3	09/29/22	0.00	0.00	0.00	0.00	0.00	199.32	199.32	House Account	(Inactive)	DAY-Q1-JAN-A...				
<input checked="" type="checkbox"/>	18847	ARSEMENT HALLIS	Active								9.32	9.32	House Account	(Inactive)	DAY-Q1-JAN-A...				
<input checked="" type="checkbox"/>	18854	THEISS KEVIN	Active								9.60	9.60	House Account	(Inactive)	DAY-Q1-JAN-A...				
<input type="checkbox"/>	18861	MARK ANDRESS	Active								0.79	0.79	Alice Cuevas	(Inactive)	DAY-RESI MON...				
<input type="checkbox"/>	18863	ALOUISIRA ELVIRA	Active								9.60	9.60	House Account	(Inactive)	DAY-Q1-JAN-A...				
<input type="checkbox"/>	18870	RASCH CLARA KIL...	Active								9.60	9.60	House Account	(Inactive)	DAY-Q1-JAN-A...				
<input type="checkbox"/>	18872	MORGAN JR WILL...	Active								2.72	2.72	House Account	(Inactive)	DAY-Q1-JAN-A...				
<input type="checkbox"/>	18877	BLANCHE CURTRES...	Active								2.30	2.30	House Account	(Inactive)	DAY-RESI MON...				
<input type="checkbox"/>	18879	GEORGE DELORES	Active								1.46	1.46	House Account	(Inactive)	DAY-Q1-JAN-A...				
<input type="checkbox"/>	18886	KIRSCH MICHAEL	Active								7.82	7.82	House Account	(Inactive)	DAY-Q1-JAN-A...				
<input type="checkbox"/>	18895	RIORDAN SHARON...	Active								2.72	2.72	House Account	(Inactive)	DAY-Q1-JAN-A...				
<input type="checkbox"/>	18897	WOODMAN YVON...	Active								2.72	2.72	House Account	(Inactive)	DAY-Q1-JAN-A...				
<input type="checkbox"/>	18902	PATTERSON CYNT...	Active								3.06	3.06	House Account	(Inactive)	DAY-Q1-JAN-A...				
<input type="checkbox"/>	18904	HOY JUDY	Active	28	10/28/22	0.00	0.00	0.00	0.00	0.00	228.00	228.00	House Account	(Inactive)	DAY-Q1-JAN-A...				
<input type="checkbox"/>	18913	RHAME GENE	Active	-16	09/09/22	0.00	0.00	0.00	0.00	0.00	188.46	188.46	House Account	(Inactive)	DAY-Q1-JAN-A...				

**EDIT ACCOUNT STATUS HISTORY**

NEW STATUS:  EFFECTIVE DATE:

NOTE:

Pathway: Accounting > AR Aging Management

### AR Payment Batch (Accounting) - Total Counts Updated (17198)

A change has been made to the AR Payment Batch Screen to change the Open, Posted, and Voided count from a batch count to a count of payments.

AR PAYMENT BATCH											ACCOUNTING > AR PAYMENT BATCH		
PERIOD	AFDELING	BANK ACCOUNT		<input checked="" type="checkbox"/> Open 4 \$ 687,00			<input checked="" type="checkbox"/> Posted 5 \$ 1,325,36			<input checked="" type="checkbox"/> Voided 0 \$ 0,00			
Aug 2024	All	All								Search			
BATCH #	AFDELING	TYPE	BRON	STATUS	DATUM	BANK CLEARED DATE	BANK ACCOUNT	COUNT	TOTAAL	GEMAAKT OP	GL BATCH		
11392	QAWASTE	Payment	None	Open	8/6/24		BANK OF NAVU	1	\$ 65,00	8/6/24 11:19 am			
11394	QAWASTE	Payment	None	Open	8/7/24		BANK OF NAVU	1	\$ 65,00	8/7/24 1:44 pm			
11395	HOUSTON	Payment	None	Open	8/8/24		COMERICA - FWS	1	\$ 19,50	8/8/24 1:14 pm			
11397	DAYTON	Payment	None External	Posted	8/12/24		COMERICA - FWS	1	\$ 975,35	8/13/24 9:13 am			
11399	HOUSTON	Payment	None External	Posted	8/13/24		COMERICA - FWS	3	\$ 322,71	8/13/24 5:30 pm			
11400	CORPUS	Payment		Open	8/1/24		Comerica Frontier Ban...	0	\$ 0,00	8/19/24 9:05 am			
11401	HOUSTON	Payment	None	Open	8/26/24		COMERICA - FWS	1	\$ 537,50	8/26/24 11:50 am			
11402	QAWASTE	Payment	Pineapple Applied Payment	Posted	8/26/24		BANK OF NAVU	1	\$ 27,30	8/26/24 1:46 pm			

Pathway: Accounting > AR Payment Batch

### AR Payment Batch (Accounting) - Modifications to AR Payment Batch (17209) [New Feature]

The following changes have been implemented in AR Payment Batch:

#### Payment Source Setup

A new Payment Source Setup screen has been added to Setup > Accounting.

PAYMENT SOURCE SETUP		
ID	NAME	ACTIVE
1000	Navu Bank	Yes
1001	Navu Wells	Yes
1002	Navu Union	No

### AR Payment Batch

In the payment batch grid (example shown below), the 'Is Merchant' column has been renamed to 'Source'.

AR PAYMENT BATCH							
BATCH #	DIVISION	TYPE	SOURCE	STATUS	DATE	BANK CLEARED DATE	
11408	PGLTC	Payment	Navu Bank	Open	10/1/24		
11409	QAWASTE	Payment	Navu Bank	Open	10/1/24		
11413	QAWASTE	Payment	Navu Bank	Open	10/4/24		
11410 Note NAVU-17209	QAWASTE	Payment	External Navu Wells	Posted	10/1/24		
11411	QAWASTE	Payment	Pineapple Applied Payment	Posted	10/3/24		
11412 Note Automatic Credit Hol...	QAWASTE	Payment		Posted	10/3/24		

### Create Payment Batch

The Bank Account field now displays the first 50 characters of the bank account description (if available). Additionally, a new Source field has been added to the popup.

AR PAYMENT BATCH							
BATCH #	DIVISION	TYPE	SOURCE	STATUS	DATE		
11408				Open	10/1/24		
11409				Open	10/1/24		
11413				Open	10/4/24		
11410 Note NAVU-17209				Posted	10/1/24		
11411				Posted	10/3/24		
11412 Note Automatic Credit Hol...				Posted	10/3/24		

**CREATE PAYMENT BATCH**

DIVISION:

DATE:

PERIOD:

BANK ACCOUNT:   
Fort Knox

SOURCE:

NOTE:

SAVE

### Payment Batch Details

**BATCH - 11411 DIVISION - QAWASTE**

DATE: 10/03/2024    BANK ACCOUNT: BANK OF NAVU    Fort Knox    SOURCE: Select Source

NOTE:    CREATED BY: Navusoft System (Admin) - 10/03/2024 9:41 am    POSTED BY:    STATUS: Posted

SORT: Entry Order ↓    DEFAULT PAYMENT TYPE:    COUNT: 4    Search for Payment in Batch

ACCOUNT ID	NAME	STATUS	BALANCE	TYPE	REFER...	AMOUNT	APPLIED AMOUNT	DEPOSIT	AUTO APPLY
49209	Michael D...	Prospect	\$ 60.31	Credit Card	1234...	101.00	0.00	<input type="checkbox"/>	<input type="checkbox"/>
49213	Completi...	Prospect	\$ 60.31	Credit Card	1234...	101.00	0.00	<input type="checkbox"/>	<input type="checkbox"/>
49212	Completi...	Prospect	\$ 60.31	Credit Card	1234...	101.00	0.00	<input type="checkbox"/>	<input type="checkbox"/>
49211	Completi...	Prospect	\$ 60.31	Credit Card	1234...	101.00	0.00	<input type="checkbox"/>	<input type="checkbox"/>

UN-POST    PRINT REPORT    VOID    IMPORT    Amount \$ 404.00

The bank account description will now be displayed after the field when selected, limited to the first 50 characters. A Source filter has also been added to the screen for improved filtering.

**AR Payment Batch - Import Popup**

The Import popup has been updated to include a Source drop down field.

**IMPORT**

SELECT FILE: Select file...    **BROWSE...**

SOURCE: Navu Bank

**IMPORT**

**GL TRANSACTION PROCESSING**

AR PERIOD: Oct 2024    **LOAD**

Pending    In Progress <sup>23</sup>    Posted    Summary

TYPE: All

TYPE	REFERENCE #	AR PERIOD	DATE	COUNT	ERRORS	AMOUNT	DIVISIONS
<b>TOTALS</b>		3		7	0	\$ 2,954.00	
Billing Batch	25919	2024-10	10/07/2024	1		\$ 100.00	QAWASTE
Payment	11412	2024-10	10/03/2024	2		\$ 2,450.00	QAWASTE
Credit Card / eChec...	11411	2024-10	10/03/2024	4		\$ 404.00	QAWASTE

**GL Transaction Processing**

When the Type is 'Payment', a "View Details" link will appear, allowing you to open the AR Batch Details upon selection.

**Billing (Accounting) - '2 Week Frequency' Billing Updates (17268)**

An enhancement now supports the 'Every 2 Weeks' billing frequency, automatically creating the next billing cycle batch once the current one is marked 'Completed.'

Pending and In Process    History

DIVISION: All    BILL GROUP: COR-ROLF BI-WEEKLY / Twice    TYPE: All Charges    YEAR: 2023    Search

BATCH ID	DIVISION	TYPE	STATUS	INVOICE DATE	FROM-TO DATE	INVOICE COUNT	AMOUNT	CREATED BY	COMPLETED/VOIDED BY
25764	CORPUS	WO and Manu...	Completed	12/11/2023		1	\$ 2.50	Navusoft System (Admin) 12/...	Navusoft System (Admin) 12/...
25664	CORPUS	WO and Manu...	Completed	08/14/2023		1	\$ 2.50	Matthew Van Doren - Admin ...	Matthew Van Doren - Admin ...

Pathway: Accounting > Billing

## Refund Request Management (Accounting) - New Feature and New Screen Added (17305, 17425, 17499) [New Feature]

A new Refund Request feature has been added to both the Customer Service screen and the Accounting module. Details about this feature, including setup, are outlined below.

REFUND REQUEST MANAGEMENT							ACCOUNTING > REFUND REQUEST MANAGEMENT		
DIVISION		DEPARTMENT		ASSIGNED TO USER		REASON		Search	
All		All		All		All			
Pending		History							
REFUND REQUEST ID	REASON CODE	CREATED BY	DIVISION	ACCOUNT	CONTACT	AMOUNT	NOTE	STATUS	ASSIGNED TO
1002	Customer Refund Request Mail Check	Paul Gonzalez - QA... at 10/9/24 2:15 pm	QAWASTE	49115 Polly's Pies Restaurant &...		\$ 6.87	Credit for overcharge invoice #6789	Returned to Submitter	Susan Silvestri
1005	Customer Refund Request Credit Card	Paul Gonzalez - QA... at 10/9/24 4:17 pm	QAWASTE	49020 Friendly Inn		\$ 12.45	Refund request test 2	Submitted for Approval	Paul Gonzalez - QA... Admin
1008	Customer Refund Request Credit Card	Paul Gonzalez - QA... at 10/10/24 8:51 am	QAWASTE	48969 Staples Center		\$ 9.99	Testing Refund Request	Submitted for Approval	Aliena Somers - Ad... Admin

## New Permissions

**Pathway:** Setup > System > Permission

Three new permissions have been added to support refund requests. Review and assign them to the appropriate roles.

- **465** - Create and Submit Refund Request
- **466** - Refund Request Management Screen
- **467** - Approve or Reject Refund Request

PERMISSION SETUP						SETUP > SYSTEM > PERMISSION	
MODULE					Refund Request		
PERMISSION ID	NAME	DESCRIPTION	MODULE	DOCUMENTATION TOPICS	DOCUMENTATION VIEW SCORE		
465	Create and Submit Refund Requ...		Accounting	0			
466	Refund Request Management S...		Accounting	0			
467	Approve or Reject Refund Request		Accounting	0			

## Reason Code Setup

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

**REASON CODE SETUP**

+ TYPE **Refund Request**

TYPE ↑	LINE OF BUSINESS	REASON CODE ↑	NAME	EXTERNAL ID
Refund Request		RFDREQ	Customer Refund Request	

**ADD REASON CODE** ? X

TYPE **Refund Request**

ID

NAME

EXTERNAL ID

GL ACCOUNT

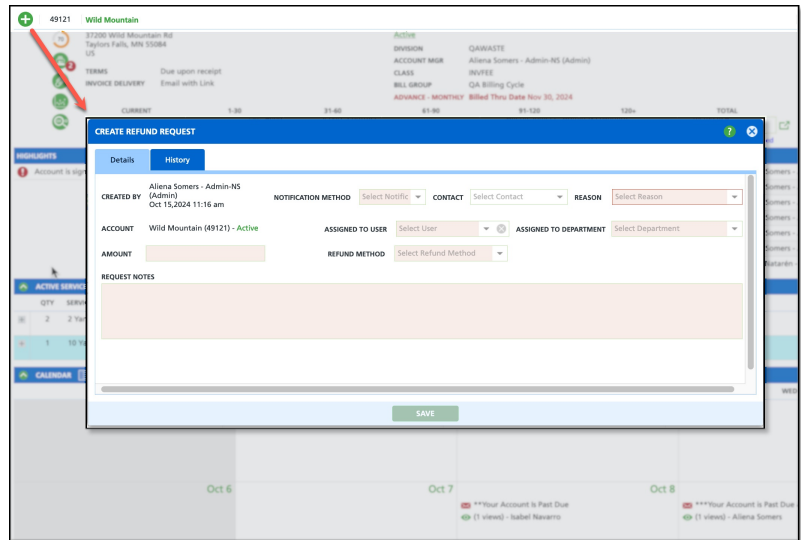
ACTIVE **Yes**

**SAVE**

A new 'Refund Request' type has been added in Reason Code Setup to accurately capture the reason for refunds. This type is used when creating refund requests in the Customer Service screen.

## Customer Service Menu Update

A 'Refund Request' option was added to the Customer Service menu. Upon selection, a new 'Create Refund Request' screen will display.



## Customer Service Screen Updates

PENDING					
1017	Service				
1010	Mail Check Customer Refund Request Aliena Somers - Admin-NS (Admin) 10/15/2024 Amount: \$ 50.00, Note: Refund on a service overcharge.				
TOTAL RECURRING					
SERVICE ID	FREQUENCY	SCHEDULE	ACCOUNT	RATE	
		TUE	WED	THU	FRI
Sep 30		Oct 1	Oct 2	Oct 3	
Oct 7		Oct 8	Oct 9	Oct 10	
Oct 14		Oct 15 Refund Request - Mail Check Customer Ref.	Oct 16	Oct 17	
Oct 21		Oct 22	Oct 23	Oct 24	

After a refund has been requested, it will display on the *Calendar* and in the *Pending* section of the Customer Service screen.

## Refund Request Management

Pathway: Accounting > Refund Request Management

A new Refund Request Management screen has been added to the Accounting module, enabling users to manage refund requests submitted via the Customer Service screen. By double-clicking a request, users can open the Edit Refund Request popup window to approve, reject, void, edit, or return the request to the submitter.

REFUND REQUEST MANAGEMENT									
DIVISION	DEPARTMENT	ASSIGNED TO USER	REASON						
All	All	All	All						
<div style="display: flex; justify-content: space-between;"> <span>Pending</span> <span>History</span> </div>									
REFUND REQUEST ID	REASON CODE	CREATED BY	DIVISION	ACCOUNT	CONTACT	AMOUNT	NOTE	STATUS	ASSIGNED TO
1002	Customer Refund Request Mail Check	Paul Gonzalez - QA Ex... at 10/24/24 2:15 pm	QAWASTE	49115	Polys Plus Restaurant & Bar...	\$ 6.87	Credit for overcharge invoice #6789	Returned to Submitter	Susan Silvestri
1005	Customer Refund Request Credit Card	Paul Gonzalez - QA Ex... at 10/24/24 4:17 pm	QAWASTE	49020	Friendly Inn	\$ 12.45	Refund request test 2	Submitted for Approval	Paul Gonzalez - QA Ex... Admin
1008	Customer Refund Request Credit Card	Paul Gonzalez - QA Ex... at 10/15/24 8:51 am	QAWASTE	48969	Staples Center	\$ 9.99	Testing Refund Request	Submitted for Approval	Allena Somers - Admin... Admin
1010	Customer Refund Request Mail Check	Allena Somers - Admin... at 10/15/24 11:24 am	QAWASTE	49159	Cafe Satorini	\$ 50.00	Refund on a service overcharge.	Submitted for Approval	Allena Somers - Admin...

## 2 Approval Requirement (Optional)

Pathway: Setup > System > Division; Role

Settings in the Division and Role setup screens will include an option to require a second approval for refund requests before they can be processed.

REFUND REQUEST MANAGEMENT									
DIVISION	DEPARTMENT	ASSIGNED TO USER	REASON						
All	All	All	All						
<div style="display: flex; justify-content: space-between;"> <span>Pending</span> <span>History</span> </div>									
REFUND REQUEST ID	REASON CODE	CREATED BY	DIVISION	ACCOUNT	CONTACT	AMOUNT	NOTE	STATUS	ASSIGNED TO
1005	Customer Refund Request Credit Card	Paul Gonzalez - Q... at 10/9/24 4:17 pm	QAWASTE	49020	Friendly Inn	\$ 12.45	Refund request test 2		
1008	Customer Refund Request Credit Card	Paul Gonzalez - Q... at 10/10/24 8:51 am	QAWASTE	48969	Staples Center	\$ 9.99	Testing Refund Request		
1012	Customer Refund Request Mail Check	David Navarro - A... at 11/1/24 2:17 pm	HOUSTON	44442	DSW	\$ 100.00	Billed incorrectly		
1016	Customer Refund Request Credit Card	PG NAVJ (Custom... at 11/4/24 4:37 pm	QAWASTE	49146	Pho-Ga District	\$ 20.00	Testing approval request		
1017	Customer Refund Request Credit Card	PG NAVJ (Custom... at 11/4/24 4:38 pm	QAWASTE	49103	Lowe's Home Improve...	\$ 50.00	Testing two approval request Requires 2 Approvals		

## Bill Group & Service Code (Setup) - Field Options Updated (17458)

In Bill Group Setup, the 'Anniversary 30 Day' option has been removed. In Service Code Setup, the Proration Method field has been updated to display only the options 'Calendar Days - Start and End' and 'Do Not Prorate' when the UOM is set to '4 week.'

**ADD SERVICE CODE**

Service Code

SERVICE CODE	<input type="text"/>	ACTIVE
NAME	<input type="text"/>	ENABLE ROUTING
LINE OF BUSINESS	<input type="text"/>	REQUIRE FREQUENCY
EQUIPMENT TYPE	<input type="text"/>	ENABLE DRIVER UPDATE
MATERIAL TYPE	<input type="text"/>	ENABLE ACCOUNT SIGNATURE
UOM	4 week	ENABLE DRIVER SIGNATURE
TAXABLE	No	ENABLE WORK ORDER MINIMUM
GL ACCOUNT	<input type="text"/>	ENABLE RENTAL FEE
TEMPORARY SERVICE GL ACCOUNT	<input type="text"/>	ENABLE DEFAULT DESTINATION
PRORATION METHOD	Calendar Days - Start and End	ENABLE NEGATIVE AMOUNT
VACATION HOLD PRORATION METHOD	Calendar Days - Start and End	ENABLE ESTIMATES TRACKING
BILL WHILE ON CREDIT HOLD	Yes	ENABLE EQUIPMENT OWNERSHIP

Pathways: *Setup > Services > Service Code* | *Setup > Accounting > Bill Group*

### GL Transaction Processing (Accounting) - Update to Batch Grouping to Separate Merchant Activity from Non-Merchant Activity (16731) [New Feature]

In GL Transaction Processing, merchant activity is now distinguished from non-merchant activity with the introduction of a new 'Credit Card/eCheck Batch' type.

**GL TRANSACTION PROCESSING**

AR PERIOD: Jan 2023 **LOAD**

Pending **In Progress 25** Posted Summary

TYPE: All ! Setup Errors (15)

TYPE	REFERENCE #	AR PERIOD	DATE	COUNT	ERRORS
		<b>23</b>		<b>7,862</b>	<b>15,008</b>
<input type="checkbox"/> Billing	25503	2023-01	01/31/2023	95	
<input type="checkbox"/> Billing	25505	2023-01	01/24/2023	6	
<input type="checkbox"/> Billing	25506	2023-01	01/30/2023	1	
<input type="checkbox"/> Billing	25507	2023-01	01/30/2023	1	
<input type="checkbox"/> Billing	25512	2023-01	01/01/2023	5,425	
<input type="checkbox"/> Billing	25522	2023-01	01/06/2023	5	
<input type="checkbox"/> Billing	25531	2023-01	01/01/2023	762	
<input type="checkbox"/> Billing	25540	2023-01	01/01/2023	1,065	
<input type="checkbox"/> Billing Batch	25574	2023-01	01/31/2023	411	
<input type="checkbox"/> Billing Batch	25576	2023-01	01/01/2023	8	
<input type="checkbox"/> Billing Batch	25636	2023-01	01/31/2023	16	
<input type="checkbox"/> Credit Card / eCheck Batch	<a href="#">View Details</a> 10788	2023-01	01/01/2023	1	
<input type="checkbox"/> Credit Card / eCheck Batch	<a href="#">View Details</a> 10790	2023-01	01/02/2023	2	
<input type="checkbox"/> Credit Card / eCheck Batch	<a href="#">View Details</a> 10792	2023-01	01/03/2023	1	
<input type="checkbox"/> Credit Card / eCheck Batch	<a href="#">View Details</a> 10793	2023-01	01/05/2023	1	
<input type="checkbox"/> Credit Card / eCheck Batch	<a href="#">View Details</a> 10794	2023-01	01/07/2023	2	
<input type="checkbox"/> Credit Card / eCheck Batch	<a href="#">View Details</a> 10795	2023-01	01/10/2023	1	

Pathway: Accounting > GL Transaction Processing

### AR Payment Batch (Accounting) - Improvement of Payment Transfer Handling (17502)

The logic in AR Payment Batch has been updated to prevent un-posting a batch if it includes a payment transfer. If the Un-Post button is disabled, a message will display at the bottom of the screen, indicating one or more payments in the batch include: Payment Reversal, Payment Refund, or Payment Transfer.

**BATCH - 11448 DIVISION - QAWASTE**

DATE: 11/26/2024    BANK ACCOUNT: NAVU WELLS    SOURCE: Navu Bank

NOTE: Test    CREATED BY: Aliena Somers - Admin-NS (Admin) - 11/25/2024 6:44 am    POSTED BY: Aliena Somers - Admin-NS (Admin) - 11/25/2024 6:47 am    STATUS: Posted

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

ACCOUNT ID	NAME	STATUS	BALANCE	TYPE	REFERENCE	AMOUNT	APPLIED DEPOSIT AMOUNT	AUTO APPLY
49232	Caribou Coffee	Active	\$ 300.00	Check	1234	300.00	0.00	<input type="checkbox"/>

'Un-post' batch is not allowed.  
Batch has one or more payments with Payment Reversal, Payment Refund, or Payment Transfer.

UN-POST    PRINT REPORT    VOID    IMPORT    Amount \$ 300.00

Pathway: Accounting > AR Payment Batch

### Billing (Accounting) - Hyperlinks Added to Counts (17475) [New Feature]

In Billing, the counts in the Invoice Count, Print Count, Notification Count, and Auto Pay Enrolled columns are now displayed as hyperlinks. Clicking a hyperlink opens a popup window with detailed information.

Pending and In Process    History

DIVISION: All

BILL GROUP	DIVISION	BATCH ID ↑	TYPE	STATUS	INVOICE DATE	TO DATE	INVOICE COUNT	PRINT COUNT	NOTIFICATION COUNT	AUTO PAY ENROLLED
Annual Billing		25841	All Charges	Processed	01/15/2025	01/31/2025	1	1		1 / 0
COR-Anniversary 4 Week	CORPUS	25925	All Charges	Not Started	10/24/2024					
COR-Anniversary 4 Week	CORPUS	25940	All Charges	Not Started	11/12/2024					
COR-COMM MON ARRE...	CORPUS	25783	All Charges	Not Started	10/01/2023	09/30/2023				

**AUTO PAY INVOICES - BATCH: 25841**

PENDING (1)     PROCESSED (0)     DECLINED (0)     EXPIRED (0)     Search

INVOICE # ↑	ACCOUNT ID	SITE ID	INVOICE AMOUNT	AUTO PAY AMO...	PAYMENT ACCOUNT INFO	AUTO PAY STATUS	RESPONSE
895518	48990		\$ 355.65		Wallet No Longer Valid	Pending	

### AR Aging Management (Accounting) - Min. Past Due Balance Filtering Fix (17582)

The **Min. Past Due Balance** filter on the AR Aging Management screen has been corrected to properly filter by the past due amount instead of the total amount.

AR AGING MANAGEMENT													
DIVISION		TYPE	ACCOUNT CLASS				TERM	BILL GROUP					
HOUSTON, QAWASTE		AR Aging By Past Due Date	asdf, AUTOCH, BROKER, CLASSTEST, COMMERCIAL, FINANCELA				All	All					
ACCOUNT MANAGER		ACCOUNT STATUS	COLLECTION GROUP / AGENCY		COLLECTION AGENT	MIN. PAST DUE BALANCE							
		Active, Bad Debt, C				600.00							
Account Information													
Select Quick Filter Search													
ACCU...	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
RECORD COUNT: 1040			TOTALS			-5,615.66	4,051,785.45	518.27	0.00	1,486.06	11,523,595.54	15,571,769.66	
<input type="checkbox"/>	43179 SHADOW CREEK CENT...	Active	15	10/24/24		0.00	0.00	0.00	0.00	0.00	1,588.38	1,588.38	House Acct non S...
<input type="checkbox"/>	43186 JESUS BANDA	Active	-2	10/31/22		0.00	0.00	0.00	0.00	0.00	3,396.89	3,396.89	House Acct non S...
<input type="checkbox"/>	43188 TRAYLOR MECHANICAL	Active	-17	10/20/23		-149.30	0.00	0.00	0.00	0.00	3,549.60	3,400.30	House Acct non S...
<input type="checkbox"/>	43195 VINEYARD CHRISTIAN...	Active	-19	10/20/23		-50.00	0.00	0.00	0.00	0.00	1,445.72	1,395.72	House Acct non S...
<input type="checkbox"/>	43197 AFFILIATED SPARTAN I...	Active	-9	11/18/22		-50.00	0.00	0.00	0.00	0.00	2,499.64	2,449.64	House Acct non S...
<input type="checkbox"/>	43202 L R WEST MFG	Active	8	11/17/23		0.00	0.00	0.00	0.00	0.00	1,742.80	1,742.80	House Acct non S...
<input type="checkbox"/>	43204 CAVA 10204	Active	7	11/03/22		0.00	0.00	0.00	0.00	0.00	4,983.09	4,983.09	House Acct non S...
<input type="checkbox"/>	43220 TRIGON PRODUCTS	Active	-5	10/25/22		0.00	0.00	0.00	0.00	0.00	3,659.19	3,659.19	House Acct non S...
<input type="checkbox"/>	43222 PRO-LINE TRACKING ...	Active	-18	11/15/22		0.00	0.00	0.00	0.00	0.00	1,942.80	1,942.80	House Acct non S...
<input type="checkbox"/>	43227 GIROUARD_JEFF	Active	12	11/15/22		0.00	0.00	0.00	0.00	0.00	2,244.53	2,244.53	House Acct non S...
<input type="checkbox"/>	43229 SILVERLAKE SHOPPIN...	Active	-14	11/15/22		0.00	0.00	0.00	0.00	0.00	14,384.94	14,384.94	House Acct non S...

Pathway: Accounting > AR Aging Management

## AR Payment Batch (Accounting) - Logic Updated to Division Filter and Import Button (17626, 17634)

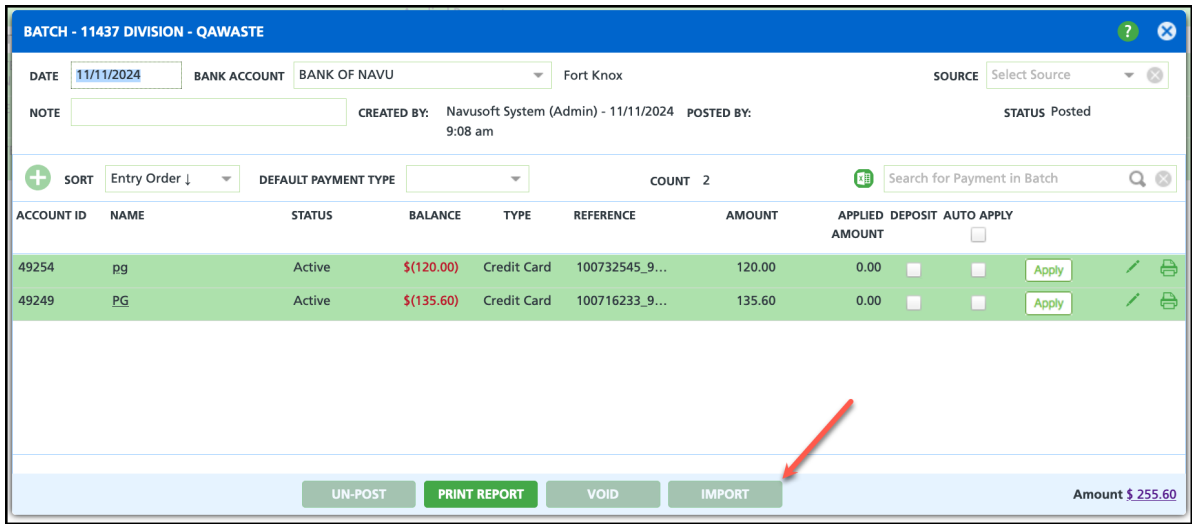
### Division Filter

Previously in AR Payment Batch, selecting "All" in the Division filter loaded payment batches for all divisions, including those outside the user's access permissions. This has been updated to display payment batches only for divisions the user has access to. However, if a batch includes payments for restricted divisions, those divisions remain visible (as shown in the example image) because the user has access to the batch's primary division.

AR PAYMENT BATCH				
PERIOD	DIVISION	BANK ACCOUNT		
Nov 2024	All	All		
BATCH #	All	Primary	DIVISION	TYPE SOURCE
11427	QAWASTE	QAWASTE (7 - \$ 354.99)	Payment	Navu Bank
Note NAVU-17425 Testing	HOUSTON (1 - \$ 100.00)			
11431	QAWASTE (2 - \$ 10.00)		Payment	Pineapple Applied Payment
11437	QAWASTE (2 - \$ 255.60)		Payment	Pineapple Applied Payment
11438	QAWASTE (2 - \$ 75.00)		Payment	
11441	QAWASTE (4 - \$ 121.00)		Payment	
Note NAVU-17502 Test	DAYTON (1 - \$ 101.00)			
11445	QAWASTE (2 - \$ 1,202.53)		Payment	Pineapple Prepayment
11448	QAWASTE (1 - \$ 300.00)		Payment	Navu Bank
Note Test				

### Import Button

The Import button is now disabled for posted and voided batches. Previously, it remained enabled for batches with these statuses.



## Billing (Accounting) - Permission Logic Updated (17670)

The following permissions have been updated:

- **Permission 109:** Renamed from **View Billing** to **View Billing and Process a Billing Batch**.
  - This permission now controls access only to the *Account / Billing* screen.
- **Permission 281:** Renamed from **Edit Account Billing Settings** to **View / Edit Account Billing Settings**.
  - This permission governs the ability to view and edit AR/AP settings on both the *Add Account* and *Edit Account* screens.
- **Permission 282:** Renamed from **Edit Site Billing Settings** to **View / Edit Site Billing Settings**.
  - This permission governs the ability to view and edit AR settings on the *Add Site* and *Edit Site* screens.

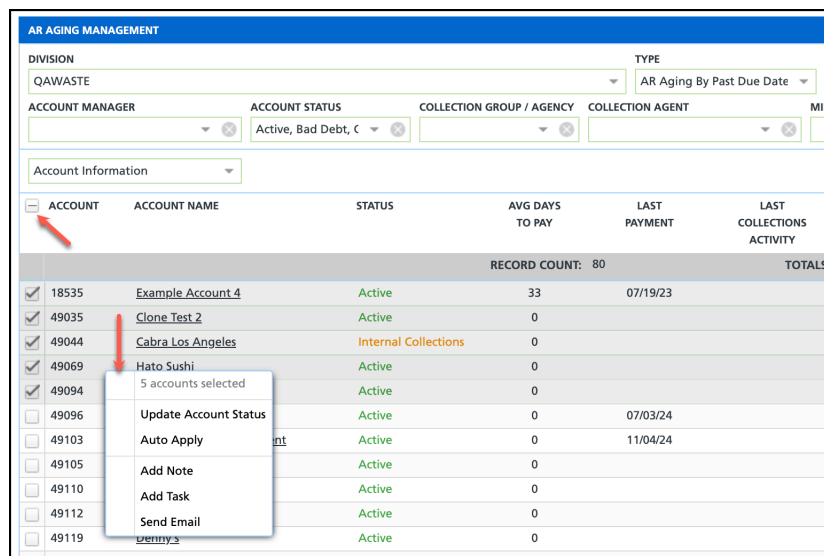
Pathway: Setup > Permissions

## AR Aging Management (Accounting) - Screen Selection Updates and Enhancements to Context Menu Actions (17441)

The following updates have been applied to the AR Aging Management screen:

### Selection Model

1. Left-clicking on row:
  - Left-clicking anywhere within the row will cause the selection of the row.



2. Right-clicking on row:

- If the row is **already selected**, the Context Menu will display.
- If the row is **not already selected**, the following will happen:
  - Removal of all existing selections so only the right-clicked row is selected.
  - Popup of Context Menu

3. Addition of indicator to 'Select All/Deselect All' checkbox

## Context Menu

When the Context Menu displays, it will include the total count of selected accounts. Additionally, the order in which options are displayed was updated.

The screenshot shows the 'AR AGING MANAGEMENT' interface. At the top, there are filters for DIVISION (QAWASTE), TYPE (AR Aging By Past Due Date), ACCOUNT MANAGER, ACCOUNT STATUS (Active, Bad Debt, C), COLLECTION GROUP / AGENCY, and COLLECTION AGENT. Below this is a table with columns: ACCOUNT, ACCOUNT NAME, STATUS, AVG DAYS TO PAY, LAST PAYMENT, and LAST COLLECTIONS ACTIVITY. A context menu is open over the table, showing '5 accounts selected' and options: Update Account Status, Auto Apply, Add Note, Add Task, and Send Email. A red arrow points to the '5 accounts selected' text in the menu.

ACCOUNT	ACCOUNT NAME	STATUS	AVG DAYS TO PAY	LAST PAYMENT	LAST COLLECTIONS ACTIVITY
18535	Example Account 4	Active	33	07/19/23	
49035	Clone Test 2	Active	0		
49044	Cabra Los Angeles	Internal Collections	0		
49069	Hato Sushi	Active	0		
49094		Active	0		
49096		Active	0	07/03/24	
49103		Active	0	11/04/24	
49105		Active	0		
49110		Active	0		
49112		Active	0		
49119		Active	0		
49131	Wild Mountain	Active	0	08/02/24	

## Edit Account Status History

Previously, the 'Update Account Status' option was only available when a single record was selected. With this update, you can now update the status of multiple accounts simultaneously.

The screenshot shows the 'AR AGING MANAGEMENT' interface with a context menu open over a table of accounts. A dialog box titled 'CHANGE STATUS OF 5 SELECTED ACCOUNTS' is displayed, allowing for simultaneous status updates. The dialog has fields for NEW STATUS, EFFECTIVE DATE, and COLLECTION GROUP / AGENCY, and a large text area for a NOTE. A 'SAVE' button is at the bottom. A red arrow points to the '5 accounts selected' text in the context menu.

ACCOUNT	ACCOUNT NAME	CONTACT 1	CONTACT 2	STATUS	HAS ACTIVE SERVICE
18557	CITY OF LIBERTY				
21198	Example Account 3				
39465	OA REGIONAL MEDICAL CENTER				
43190					
43191					
43192					
43193					
43206					
43207					
43208					
43209	LR TRANSPORT				
43223	COMPOSI TECH INC				
43224	PIPE & TUBE SUPPLIES			Active	Yes
43225	DDS SYNERGY SHADOW CREEK LLC	DDS Synergy Shadow Creek LLC		Active	Yes
43226	RELIABLE SIGNAL & LIGHTING	invoices		Active	Yes

### Billing (Accounting) - Billing Comparison Analysis Report Not Generating (17660)

An issue has been resolved that caused an internal server error when running the Billing Comparison Report, which previously resulted in no data being returned.

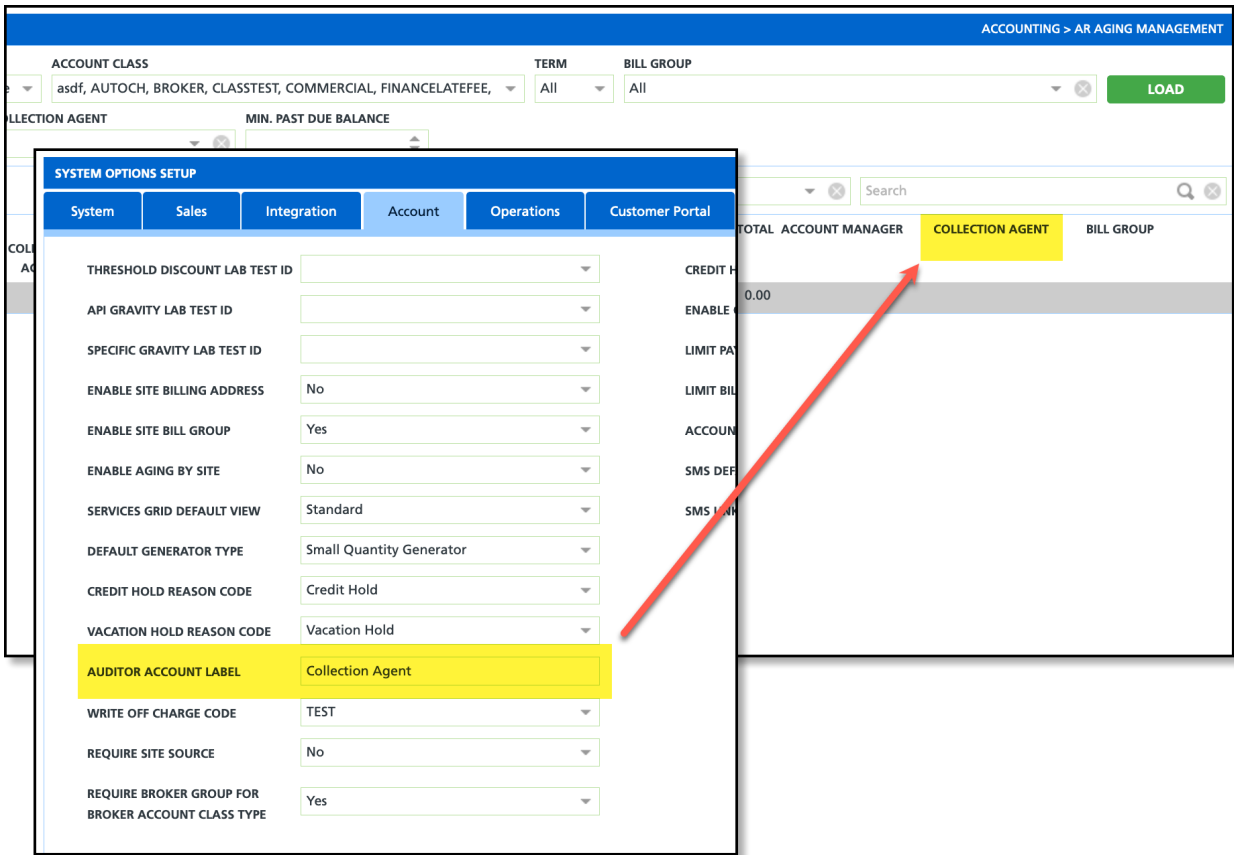
The screenshot shows a software interface with a top navigation bar containing 'Pending and In Process' and 'History' tabs. Below the navigation bar, there are filters for DIVISION (All), BILL GROUP (Residential Monthly), TYPE (All Charges), and YEAR (2024). A table lists a single entry with BATCH ID 25777, DIVISION All Charges, STATUS Completed, INVOICE DATE 01/15/2024, and FROM-TO DATE 01/01/2024 - 01/31/2024. A context menu is open over the 'Billing Analysis' option, listing 'View Details', 'Print Paper Invoices', 'Print All Invoices', and 'Print Emailed Invoices'. A red arrow points from the 'Billing Analysis' option to the 'BILLING ANALYSIS WINDOW' dropdown menu, which is currently set to 'Billing Comparison'. The window displays a table with the following data:

TYPE	*INVOICEID	SITE NAME	2024-01	2023-12	2023-11	2023-10	2023-09	2023-08	2023-07	2023-06
48981001	890095	Tasty Donuts	235.00	0	0	0	0	0	0	0
48982001	890096	Panda Express	755.00	0	0	0	0	0	0	0
48990001	890097	Example Site	0.00	0	0	0.00	0	0	0	0

Pathway: Accounting > Billing

### AR Aging Management (Accounting) - Auditor Column Label Updated (17394)

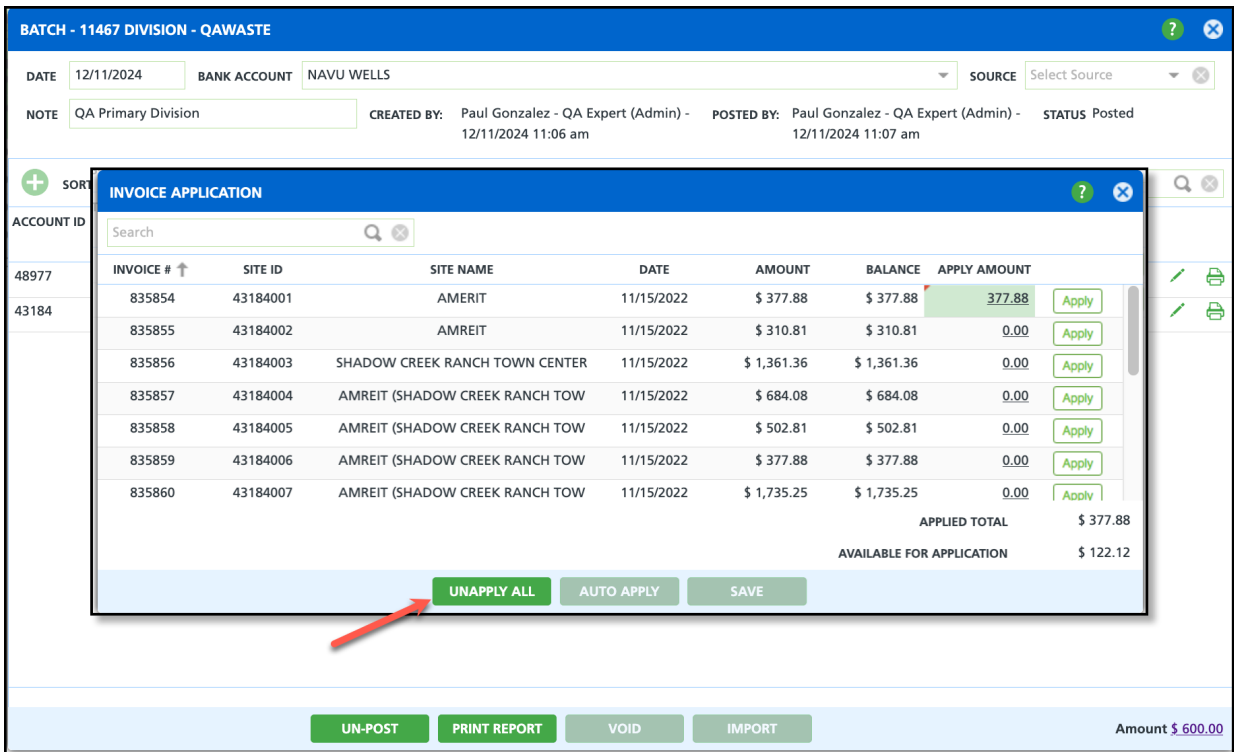
The logic for the Auditor header in AR Aging Management has been updated to first check the Auditor Account Label field in System Options Setup and use the value listed. If the field is empty, the header defaults to 'Auditor'.



Pathway: Setup > System > System Options > Account (tab) | Accounting > AR Aging Management

### Invoice Application (AR Payment Batch) - 'Unapply All' Button Added (17172)

A new "Unapply All" button has been added to the Invoice Application screen for easier management.



Pathway: Accounting > AR Payment Batch

# Reports

## Standard Reports (AR) - Updates to Tax Details and Tax Summary Reports (17994)

The Total Sales column has been removed from the Tax Details and Tax Summary reports.

Tax Details								Page 1 of 1		
Period: Jan 2025, Tax: Alamo Heights City Tax										
Division #	Division	Site #	Site Name	Tax Region	Tax Exempt	Posting Period	Invoice #	TOTAL SALES	TAXABLE REVENUE	TAXES
1001		41770003		Alamo Heights City Tax	0	2025-01	693829	1,236.70	123.67	1.87
1001		108030001		Alamo Heights City Tax	1	2025-01	689427	328.54	0.00	0.00
1001		140420001		Alamo Heights City Tax	0	2025-01	689481	479.42	239.71	3.60
1001		1082540001		Alamo Heights City Tax	0	2025-01	690521	851.61	851.61	12.77
1001		1387140002		Alamo Heights City Tax	0	2025-01	703100	519.12	86.52	1.29
1001		1797620001		Alamo Heights City Tax	0	2025-01	691508	121.00	121.00	1.82
1001		2083740002		Alamo Heights City Tax	0	2025-01	710978	207.00	69.00	1.05
1001		2502340002		Alamo Heights City Tax	0	2025-01	692569	126.47	126.47	1.90
1001		28558100002		Alamo Heights City Tax	0	2025-01	729746	29,761.55	2,289.35	34.34
1001		28558100002		Alamo Heights City Tax	0	2025-01	730533	11,799.28	1,474.91	22.12
1001		29720700008		Alamo Heights City Tax	0	2025-01	594319	-18.54	-18.54	-0.28
1001		29720700008		Alamo Heights City Tax	0	2025-01	684259	-18.54	-18.54	-0.28
1001		29720700008		Alamo Heights City Tax	0	2025-01	693393	584.04	146.01	2.19
1001		29720700008		Alamo Heights City Tax	0	2025-01	693393	-18.54	-18.54	-0.28
1001		29720700013		Alamo Heights City Tax	0	2025-01	693398	602.61	200.87	3.02
<b>Total</b>								<b>\$ 46,561.72</b>	<b>\$ 5,673.50</b>	<b>\$ 85.13</b>

Pathway: Reports > Standard Reports > AR

## AR Analysis Report (AR) - Logic Updated to Taxes and Adjustments (17993)

The logic for Adjustments and Taxes in the AR Analysis report has been updated to separately report any taxes included in an adjustment in the Taxes line. Previously, the taxes for adjustments were being included in the adjustments total line.

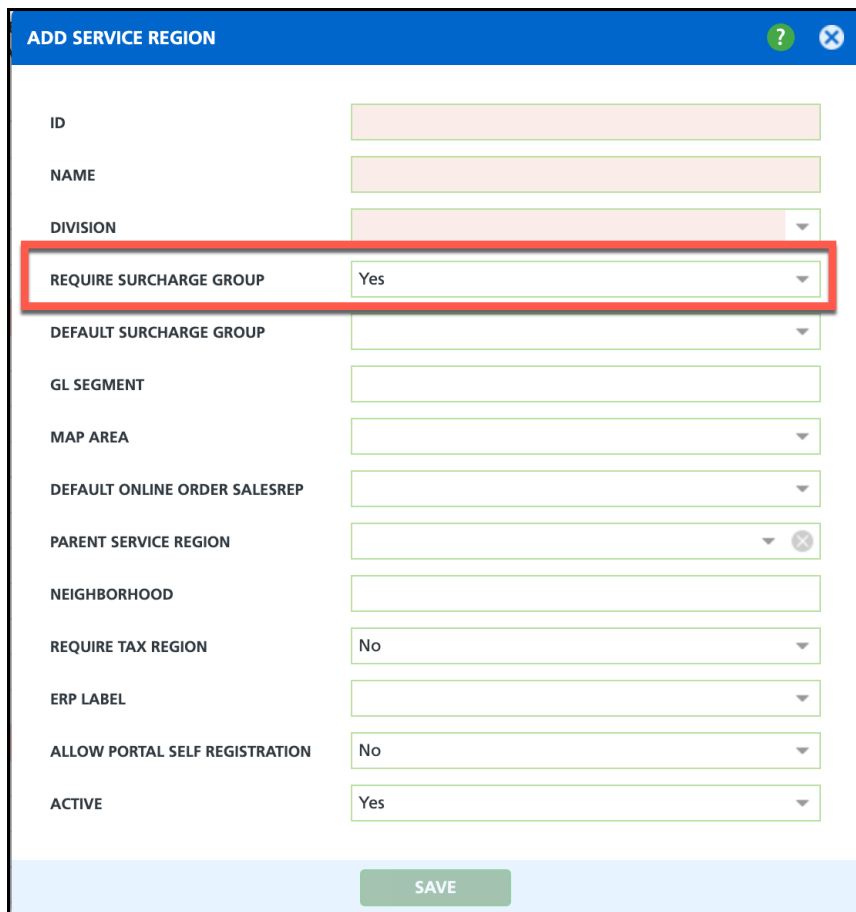
AR ANALYSIS									
TYPE	AR Analysis								
YEAR	2025								
DIVISION	HOUSTON								
	<input type="button" value="LOAD"/>								
	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	
Beginning Balance	10,592,877.02	10,603,990.97	10,603,952.52	10,603,952.52	10,603,952.52	10,603,952.52	10,603,952.52	10,603,952.52	10,603,952.52
Imported AR	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Manual Charges	69.95	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Recurring Services	10,262.06	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Surcharges	11.84	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Taxes	853.28	-3.45	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Adjustments	-83.18	-35.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Total	10,603,990.97	10,603,952.52	10,603,952.52	10,603,952.52	10,603,952.52	10,603,952.52	10,603,952.52	10,603,952.52	10,603,952.52

Pathway: Reports > Analysis > AR Analysis

# Setup

## Service Region Setup (Setup) - 'Require Surcharge Group' Field Added (16966) [New Feature]

Within the Service Region setup screen, a new field 'Require Surcharge Group' has been added. If enabled, the surcharge field will become a required field when adding an account or site, or editing a site.



The screenshot shows the 'ADD SERVICE REGION' form with the following fields:

Field Name	Value
ID	
NAME	
DIVISION	
REQUIRE SURCHARGE GROUP	Yes
DEFAULT SURCHARGE GROUP	
GL SEGMENT	
MAP AREA	
DEFAULT ONLINE ORDER SALESREP	
PARENT SERVICE REGION	
NEIGHBORHOOD	
REQUIRE TAX REGION	No
ERP LABEL	
ALLOW PORTAL SELF REGISTRATION	No
ACTIVE	Yes

A red box highlights the 'REQUIRE SURCHARGE GROUP' field, which is currently set to 'Yes'. A 'SAVE' button is located at the bottom of the form.

Pathway: Setup > Services > Service Region

## Reason Code Setup (Setup) - New 'Enable Temporary Service' Field Added (16950) [New Feature]

An 'Enable Temporary Service' field has been added to the Reason Code Setup screen. When enabled and the reason code is selected for an active service, the 'Duration' field will display with the options 'Permanent' or 'Temporary'. Additionally, to support the availability of temporary services, a "Temporary Service GL Account" field has been added to the following screens:

- o Service Code,
- o Charge Code
- o Line Of Business

**ADD ACTIVE SERVICE**

REASON CODE: **New - Temporary** | START DATE: 07/12/24 Friday | Week 28 (A) | 0 per cubic yard (new)

QTY: 1 | EQUIPMENT: 8 Yard FL | SERVICE CODE: 8 Yard Trash Service | FREQUENCY: 1x per week | PER UNIT: 0.0000 | SERVICE FEES: 0.00

DURATION: Permanent | SERVICE DAYS: Temporary | REQUESTED BY: | SERVICE NOTES: | ROUTE: | FL Delivery:  | WORK ORDER NOTES: | SERVICE CHARGES: |

**EDIT REASON CODE**

TYPE: Add Service | ID: NEW\_TMP | NAME: New - Temporary | EXTERNAL ID: | SALES RESULTS REPORT TYPE: Temp / Seasonal | IS NEW OWNER: No | IS OLD OWNER: No | APPLY 1085 RULE: No | EXCLUDE FROM 1085: No | EXCLUDE FROM COMMISSION: No | **ENABLE TEMPORARY SERVICE: Yes** | ENABLE VENDOR: No | CAPTURE COMPETITOR: No | ACTIVE: Yes

Pathway: Setup > System > Reason Code

**Notification Template (Setup) - Text Message Notifications Include HTML Link (16896)**

Previously, invoice numbers in SMS notifications were sent with HTML markups in the link. This has been resolved to display the invoice number in plain text.

Notification History		Email Block List					
DIVISION	DATE	NOTIFICATION TEMPLATE TYPE	DELIVERY STATUS	SENT BY	TYPE	TO EMAIL	
QAWASTE	/within Last 30 Days	All	All	All	All		<b>LOAD</b>
SENT ON ↓		FROM	TO	DELIVERY STATUS	DIVISION	SUBJECT	MESSAGE
07/08/24 6:09 pm ID: 382584	From: SMS Sent By: House Account	(555) 673-1699 Restaurant Row (49040)	Delivered	QAWASTE	CC or ACH Payment Receipt	Your payment amount of 52.51 has been received on Jul 8, 2024 and applied to invoices: 895469	
07/08/24 6:05 pm ID: 382583	From: SMS Sent By: House Account	(555) 673-1699 Restaurant Row (49040)	Delivered	QAWASTE	CC or ACH Payment Receipt	Your payment has been received.	
07/08/24 2:06 pm ID: 382580	From: DAY_Div_Svc@navusof... Sent By: Isabel Navarro	amy@navusoft.com To: Natalie Example Site 1 (41902001)	Undelivered	QAWASTE	Service Notification- Cancelled - WO #8030520	Your stop on Aug 2, 2024 for 10 Yard Open Top Service at 2222 Navu Cir has been cancelled. Please call the office in any questions.	
07/08/24 2:06 pm ID: 382581	From: DAY_Div_Svc@navusof... Sent By: Isabel Navarro	amy@navusoft.com To: SIERRA GREEN Example Site 1 (41902001)	Undelivered	QAWASTE	Service Notification- Cancelled - WO #8030520	Your stop on Aug 2, 2024 for 10 Yard Open Top Service at 2222 Navu Cir has been cancelled. Please call the office in any questions.	
07/08/24 2:06 pm ID: 382582	From: DAY_Div_Svc@navusof... Sent By: Isabel Navarro	amy@navusoft.com To: Aliena Example Site 1 (41902001)	Delivered	QAWASTE	Service Notification- Cancelled - WO #8030520	Your stop on Aug 2, 2024 for 10 Yard Open Top Service at 2222 Navu Cir has been cancelled. Please call the office in any questions.	
07/07/24 6:00 am ID: 382577	From: admin@navusoft.com Sent By: House Account	amy@navusoft.com To: Aliena Central Perk (48989)	Delivered	QAWASTE	***Your Account is Past Due & Has Been Cancelled	Dear Central Perk - 48989  This is a notice that your account is now canceled due to non-payment. The total due on your account is \$754.85.	

Pathway: Setup > System > Notification Template

## Account Class (Setup) - Addition of Per Invoice Fees (17022, 17027) [New Feature]

A new default setting, 'Per Invoice Fee', is available in the Account Class setup screen that will be visible on the Customer Service screen and in Edit Account when configured.

### Account Class Setup - Finance Charges and Other Fees

New Default Setting Fields:

- Per Invoice Fee 1 (and 2) Charge Code
- Per Invoice Fee 1 (and 2)

Logic:

- If the Per Invoice Fee Charge Code field is blank, the Per Invoice Fee field linked to it can not be edited.

UPDATE ACCOUNT CLASS	
Details	Customer Portal
FINANCE CHARGE TYPE	During Billing
ANNUAL RATE	0.00
CHARGE CODE	
CHARGE MINIMUM	0.00
PAST DUE MINIMUM	10.00
INSUFFICIENT FUNDS FEE	0.00
INSUFFICIENT FUNDS FEE CHARGE CODE	
CREDIT HOLD PLACEMENT FEE	0.00
CREDIT HOLD PLACEMENT FEE CHARGE CODE	
PER INVOICE FEE 1 CHARGE CODE	Paper Bill Fee
PER INVOICE FEE 1	10.00
PER INVOICE FEE 2 CHARGE CODE	
PER INVOICE FEE 2	

Auto Save Suspended - Validation Error

### Customer Service Screen & Edit Account

Customer Service Screen:

- Click within the Account Details section of the Customer Service screen to view the Paper Bill Fee
- If an override exists for the account, it will be displayed first, followed by the default setting configured in the Account Class.

Edit Account:

- In the Settings tab of Edit Account, the Paper Bill Fee displays as a link in the Billing section. Click on the link to open the Override Paper Bill Fee dialog, which allows the user to enter an account-level override.  
**Note:** If an override amount is entered, the user must select 'Done' for the dialog box and then 'Save' for the Edit Account screen.

**49146 Example Account**

3119 N San Gabriel Blvd  
Rosemead, CA 91770-2545  
US

TERMS: COD  
INVOICE DELIVERY: Printed

**Active**

DIVISION: QAWASTE  
ACCOUNT MGR: Paul Gonzalez  
CLASS: INV FEE  
BILL GROUP: QA Billing Cycle  
ADVANCE - MONTHLY: Billed Thru Date None  
NEXT INVOICE DATE: Jul 01, 2024 BATCH-25880 (not started)  
SOURCE: Call In  
REBATE PAYMENT: ACH

PAPER BILL FEE: \$ 8.00 (Default \$ 10.00)

**EDIT ACCOUNT**
?
✕

Account
Settings

**Billing**

BILL GROUP: QA Billing Cycle

Advance - Monthly    Billed Thru Date None    Next Invoice Date Jul 01

INVOICE BY EMAIL: No

TERM: COD

CREDIT LIMIT:

PAPER BILL FEE: \$ 8.00 (Default \$ 10.00) →

**AP**

DEFAULT WALLET: ACH ▼

INSTRUCTIONS:

WARNING ON OPEN:

1099

**SAVE** ←

**OVERRIDE PAPER BILL FEE**
?
✕

DEFAULT AMOUNT: \$ 10.00

Override Amount:

**DONE** ←

### Route Setup (Setup) - Option to Specify Default Truck and Driver to Each Day of Week (16997) [New Feature]

In the Add/Edit Route, users can now specify default trucks and drivers for each day of the week. Additionally, a Default Description field has been added, allowing users to include a label that will appear in parentheses after the route name in Dispatch for the specified day.

**ROUTE SETUP**

DIVISION All  LOB All

NAME ↑	DIVISION	LOB	DEFAULT TRUCK	DEFAULT DRIVER
ALVARO				
COR 101				
COR 102				
COR 102				
COR 201				
COR 202				
COR 203				
COR 203R				
COR 204				
COR 205				
COR 301				
COR 302				
COR 303				
COR 304				
COR 305				
COR 306				
COR 307				
COR 308				
COR 401				
COR 402				
COR DUMPSTER DEL/REM				
COR RS CARTS DEL/REM				
COR TEMP HOLDING				
COR-RMW-1				
DAY 101				
DAY 101				
DAY 102				

**ADD ROUTE**

NAME  ACTIVE Yes

DEFAULT DESCRIPTION  LINE OF BUSINESS

DIVISION  DEFAULT DISPOSAL LOCATION

EXTERNAL ID  DEFAULT TRANSPORTER

DEFAULT TRUCK   SUPERVISOR

DEFAULT DRIVER   HOLIDAY SCHEDULE

DEFAULT HELPER 1   EXCLUDE HEALTH SCORE No

DEFAULT HELPER 2

Monday Tuesday Wednesday Thursday Friday Saturday Sunday

MAP AREA   START YARD   END YARD   START TIME --:-- -- MAXIMUM HOURS

DEFAULT DESCRIPTION  DEFAULT TRUCK   DEFAULT DRIVER

### Service Region Setup (Setup) -Screen Enhancements (17037)

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

1. Addition of a Division filter.
2. A CSV export option was added.
3. Addition of Search.

ID ↑	NAME	DIVISION	REQUIRE SURCHARGE GROUP	DEFAULT SURCHARGE GROUP	GL SEGMENT	MAP AREA	DEFAULT ONLINE ORDER SALESREP	PARENT SERVICE REGION	NEIGHBORHO...	REQUIRE TAX REGION	ALLOW PORTAL SELF REGISTRA...	ACTIVE
1001	WOODCREEK	DAYTON	No	Fuel Surcharge - R...	SVCD1001					Yes	No	Yes
1002	PARKSIDE AT...	DAYTON	No	Fuel Surcharge - R...	SVCD1002					Yes	No	Yes
1003	ATASCA WO...	DAYTON	No	Fuel Surcharge - R...	SVCD1003					Yes	No	Yes
1004	ATASCOCITA ...	DAYTON	No	Fuel Surcharge - R...	SVCD1004					Yes	No	Yes
1005	KINGS LAKE ...	DAYTON	No	Fuel Surcharge - R...	SVCD1005					Yes	No	Yes
1006	HUMBLE - NE...	DAYTON	No	12345678901...						Yes	No	No
1007	ATASCA OAKS	DAYTON	No		SVCD1007					Yes	No	Yes
1008	OAKS OF AT...	DAYTON	No		SVCD1008					Yes	No	Yes
1009	STILLWATER ...	DAYTON	No	Fuel Surcharge - R...	SVCD1009					Yes	No	Yes
1010	KINGWOOD ...	DAYTON	No	Fuel Surcharge - R...	SVCD1010					Yes	No	Yes
1011	LIBERTY COU...	DAYTON	No		SVCD1011					Yes	No	Yes
1012	THE COMMO...	DAYTON	No	Fuel Surcharge - R...	SVCD1012					Yes	No	Yes
1013	PINEY WOODS	DAYTON	No		SVCD1013					Yes	No	Yes
1014	ENCLAVE AT ...	DAYTON	No		SVCD1014					Yes	No	Yes
15	15	DAYTON	No							No	No	Yes
CORPUS	CORPUS OPE...	CORPUS	No	Fuel Surcharge - C...	SVCDCORPUS	Corpus Test 1				Yes	Yes	Yes
DAYTON	DAYTON OPE...	DAYTON	No	Fuel Surcharge - R...	SVCDDAYTON					Yes	No	Yes
DeleteMe	Delete Me	QAWASTE	No							No	No	No
DELT	Delete Me	QAWASTE	No							No	No	Yes
Hearne_SR	Hearne_SR	HEARNE	No		SVCDHEARNE					No	No	Yes
HOUSTON	HOUSTON O...	HOUSTON	No	Fuel Surcharge - C...	SVCDHOUST...	Houston				Yes	No	Yes
LA	LOS ANGELES	HOUSTON	No		SVCDLA					No	No	Yes
OC	Orange County	QAWASTE	Yes							No	No	Yes
PRLD_MUNI	PEARLAND ...	HOUSTON	No	Pearland Franchise...	SVCDPRLD					Yes	No	Yes
QASVCREG	QA Service R...	QAWASTE	Yes		SVCDQAS					No	No	Yes
QAWASTE	QA Waste OP...	QAWASTE	No		SVCDQA					No	No	Yes
SANDIEGO	SD	QAWASTE	No							No	No	Yes

Pathway: Setup > Services > Service Region

### Line Of Business (Setup) - 'Service Description Display' Field Added (17069)

A 'Service Description Display' drop-down field has been added to the Mobile tab of the Line of Business Setup screen.

**UPDATE LINE OF BUSINESS**

LOB ID: FEL

NAME:  ACTIVE:

Settings
Mobile
Optimization
Self-Service Ordering
Productivity and Profitability

DAYS AVAILABLE TO DRIVER:  AUTO COMPLETE SECONDS:

RECEIPT HEADER TEXT:  ACKNOWLEDGEMENT TEXT:

SERVICE DESCRIPTION DISPLAY:

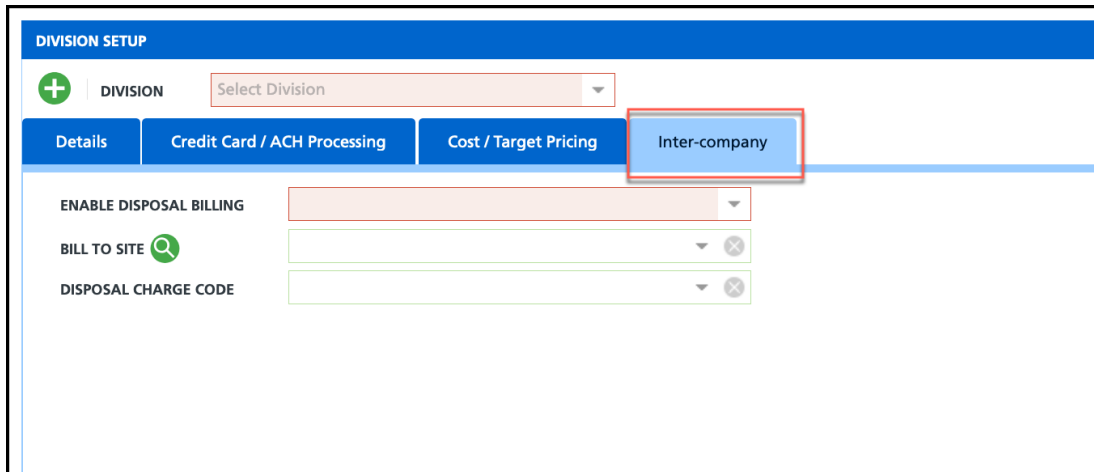
ENABLE COMPLETION NOTE ENTRY:

Pathway: Setup > Services > Line Of Business

### Setup - Settings for Intercompany Billing Added (17053) [New Feature]

#### Division Setup

- Inter-company tab added
  - Enable Disposal Billing field options:
    - No
    - Yes (Bill to Site for each transaction)
    - Yes (Automated GL Batch)
  - Bill to Site
    - Includes a site search to direct billing to.
  - Disposal Charge Code
    - Displays a drop down list of charge codes



## Facility Setup

1. In the Facility Setup screen, an Ownership column was added with 'Internal' bolded for each facility internal is identified for.
2. When Internal is identified for a facility, the Add/Update Disposal Rate for the facility will include a 'Rate for Internal Trucks' field.

**FACILITY SETUP**

+ TYPE All DIVISION All

ID	NAME	ABBREV	DIVISION	TYPE	OWNERSHIP	ACTIVE	ADDRESS LINE 1
1001	CITY OF ALICE LF	ALICE	CORPUS	Landfill	Third Party	Active	3217 N U.S. Hw...
1002	CEFE LF	CEFE	CORPUS	Waste to Energy	Third Party	Active	2397 Co Rd 20
1003	GULLEY HURST LF	GULH	CORPUS	Landfill	Internal	Active	1435 Co Rd 26
1004	RSG-MAT & RECYCLING	MAT	DAYTON	Recycle Center / ...		Active	3995 FM 1485
1005	WILSONVILLE LF	WVIL	DAYTON	Landfill	Third Party	Active	4791 Tri City Be...
1006	WILSONVILLE LF	WVIL	DAYTON	Landfill	Internal	Active	3623 Wilson Rd
1007	WILSONVILLE LF	WVIL	DAYTON	Landfill	Internal	Active	69
1008	WILSONVILLE LF	WVIL	DAYTON	Landfill	Third Party	Active	19248 TX-105
1009	WILSONVILLE LF	WVIL	DAYTON	Landfill	Internal	Active	6632 John Ralst...
1010	WILSONVILLE LF	WVIL	DAYTON	Landfill		Active	
1011	WILSONVILLE LF	WVIL	DAYTON	Transfer Station		Active	18784 E Hardy Rd
1012	WILSONVILLE LF	WVIL	DAYTON	Landfill	Internal	Active	7245 Veterans ...
1013	WILSONVILLE LF	WVIL	DAYTON	Recycle Center / ...		Active	717 Lester St

**ADD DISPOSAL RATE**

DISPOSAL LOCATION: GULLEY HURST LF

MATERIAL TYPE: [ ]

ORIGIN: [ ]

EFFECTIVE DATE: 07/29/2024

RATE: [ ]

RATE UOM: [ ]

**RATE FOR INTERNAL TRUCKS**: [ ]

MINIMUM QUANTITY: [ ]

NOTE: [ ]

FEE 1: [ ]

FEE 1 TYPE: Flat

FEE 1 NAME: [ ]

### Sale Stage Setup - Verbal and Discovery Removed from Sale Stage Options (17086)

Sales stages 'Discovery' and 'Verbal' have been removed as options from the following locations:

1. Sale Stage Setup
2. Sales Rep Map
3. Site Status History

**SALE STAGE SETUP** SETUP > SALES > SALES STAGE

ID ↑	NAME
0	Lead
1	Qualified
2	Opportunity
4	Proposed
6	Closed (Won)
7	Closed (Lost)

Pathway: Setup > Sales > Sales Stages

### Add User (Setup) - Updates to 'Department' and 'Sales Goal Type' Fields (17068)

The following changes have been made to the Add User tool:

1. A clearing option has been added to the Department field.
2. A 'None' option, which is now the default setting, has been added to the Sales Goal Type field.

ADD USER
?
✕

STATUS	Active	DEFAULT HOMEPAGE	
FIRST NAME		ONLINE IMAGE	Select Image... <span style="background-color: #0070c0; color: white; padding: 2px 5px;">BROWSE...</span>
LAST NAME		<p style="font-size: 0.8em; color: green;">Valid email is required. Email with temporary password will be sent to this email.</p>	
EMAIL			
CELL PHONE	<span style="font-size: 0.8em;">🇺🇸</span> (999) 999-9999	TITLE	
OFFICE PHONE	<span style="font-size: 0.8em;">🇺🇸</span> (999) 999-9999	DEPARTMENT	
		MANAGER	
TITLE		SALES GOAL TYPE	None
DEPARTMENT		EXTERNAL ID	
MANAGER		EXTERNAL USER ID	
SALES GOAL TYPE	None	DEFAULT APP COLOR	Dark Gray
EXTERNAL ID		WORKER COST PER HOUR LEVEL	
EXTERNAL USER ID		AUTOMATIC COUNTERSIGN	No
DEFAULT APP COLOR	Dark Gray	SIGNATURE IMAGE	Select Image... <span style="background-color: #0070c0; color: white; padding: 2px 5px;">BROWSE...</span>
WORKER COST PER HOUR LEVEL			

SAVE

Pathway: Setup > System > User

### Account Class Setup (Setup) - "Require Site Class" Field Added (17098)

In the Details tab of the Account Class screen, a new 'Require Site Class' checkbox has been added. This checkbox requires that a site class be selected when creating a new account or site within that account class.

UPDATE ACCOUNT CLASS
?
✕

Details
Customer Portal
Payment Processing
Status Management
Finance Charges and Other Fees

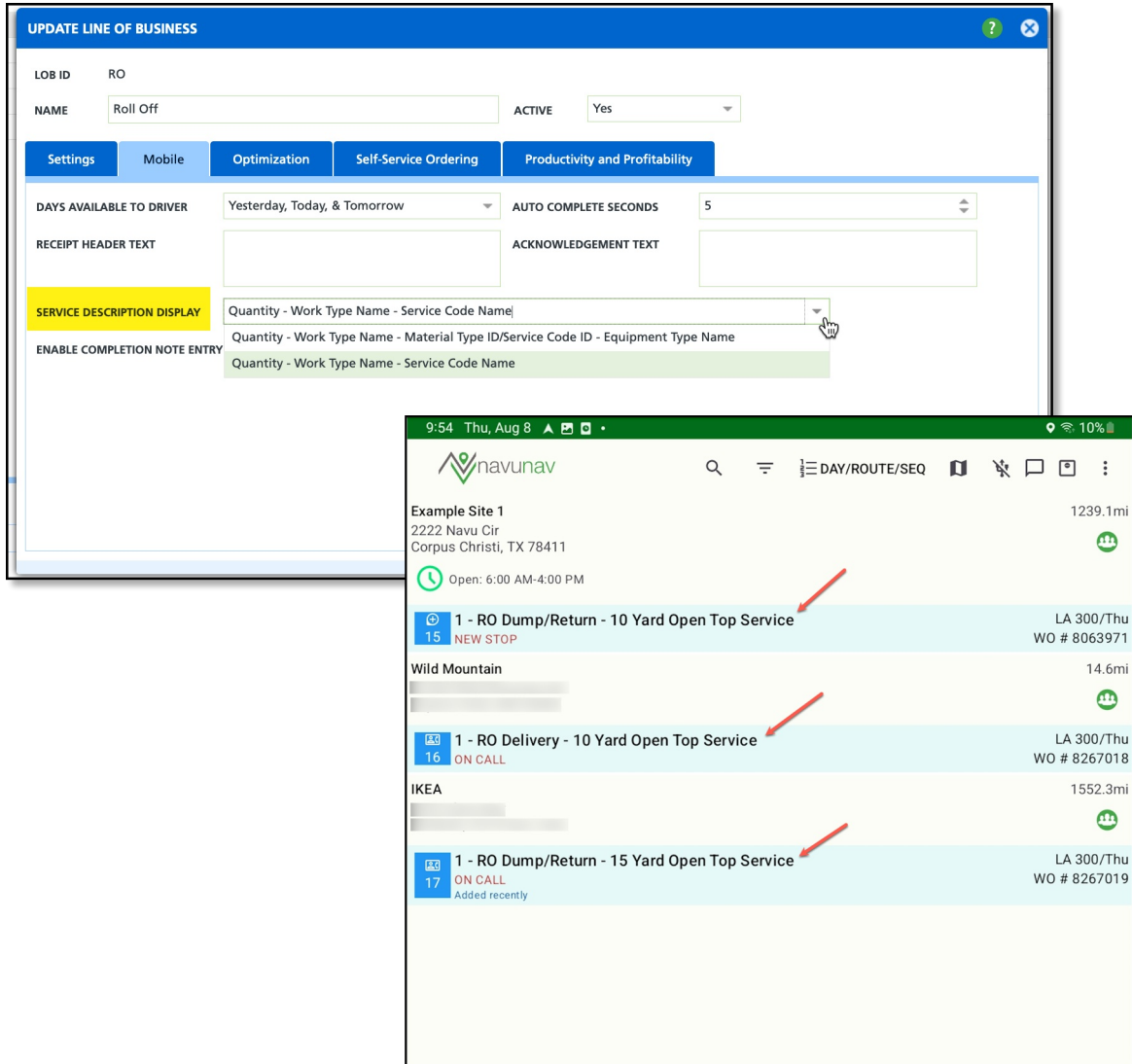
NAME	COMMERCIAL	CREATE CONTACT DEFAULT	Account
ACTIVE	Yes	DEFAULT CONTACT SERVICE NOTIFICATION	Yes
TYPE	Business	GEOCODING TYPE	Roof Top
GL ACCOUNT	Accounts Receivable	GEOFENCE RADIUS (METERS)	30
GL SEGMENT	SEG12	NEW ACCOUNT NOTIFICATION TEMPLATE	116
DEPOSIT GL ACCOUNT	CNB Bank Account	REQUIRE GENERATOR TYPE	No
DEPOSIT GL SEGMENT	14000	ENABLE LINKING CONTACTS TO ALL SITES	Yes
DEFAULT ACCOUNT CREDIT LIMIT	500	LOAD ACTIVE ACCOUNTS IN PIPELINE	Yes
DEFAULT ACCOUNT TERM	Net 20	MAP	
DEFAULT REBATE PAYMENT TYPE	ACH	REQUIRE BILLING CONTACT	No
DEFAULT BILL BY SITE	No	EXCLUDE FROM NAVU SALES	No
		ENABLE DUPLICATE ACCOUNT AND SITE CHECK	Yes
		HIDE RATE ON WORK ORDER FORMAT	<input type="checkbox"/>
		<b>REQUIRE SITE CLASS</b>	<input checked="" type="checkbox"/>

Saved.

Pathway: Setup > Accounts > Account Class

### Line of Business (Setup) - NavuNav (Android) Setting Added (17070) [New Feature]

A new 'Service Description Display' field has been added to the Mobile tab for a Line of Business. This change affects how the service description is displayed to drivers in NavuNav (Android).



Pathway: Setup > Services > Line of Business

### Division (Setup) - Division Setup Screen Updates (17111)

The following changes have been made to the Division Setup screen:

1. A green + was added to the screen to open the Add Division tool.
  - To edit a division, double click within its row.
2. The screen now includes export and refresh buttons and a search bar.

DIVISION SETUP				SETUP > SYSTEM > DIVISION
DIVISION ID	NAME ↑	LEGAL ADDRESS	PHONE	
1002	CORPUS	PO BOX 12345 Corpus Christi, TX	+1 555-555-5588	
1003	DAYTON	PO BOX 11111 legal addr 2 Corpus Christi, TX	+1 555-555-9035	
1006	HEARNE	123 VAUGHN LN HEARNE, TX	+1 555-555-0705	
1005	HILLSBORO	15 HILLSBORO, TX	+1 555-555-0705	
1004	HOUSTON	PO BOX 22222 Houston, TX	+1 555-555-9035	
1008	NAVU	123 Main St Pasadena, CA	+1 555-555-5556	
1011	PGLTC	234 N Rodeo Dr Beverly Hills, CA	+1 555-555-1234	
1001	QAWASTE	567 Santa Monica Pier Santa Monica, CA	+1 555-555-2905	
1007	TEST	123 Main St Absecon, NJ	+1 555-555-1234	
1009	TEST2	345 Hwy 6 Sugar Land, TX	+1 555-555-1234	!
1010	test5	6565 Fannin St Houston, TX	+1 555-555-0953	

Pathway: Setup > System > Division

### Reason Code (Setup) - Logic Updated to Display of Line of Business Field (17146)

Logic has been updated for the Line of Business field in the Add Reason Code screen. When 'Downtime' is selected as the Type, the Line of Business field will no longer be required.

**ADD REASON CODE**
?
✕

**TYPE**

**ID**

**NAME**

**EXTERNAL ID**

**DISPLAY IN MOBILE**

**LINE OF BUSINESS**

**ACTIVE**

Pathway: Setup > System > Reason Code

### System Options (Setup) - Limit Material Type By Line Of Business (17142) [New Feature]

#### Setup Screen Changes

In the System Options Setup screen, a new field called 'Enable Limit Materials to LOB' has been added under the Operations tab. When this option is enabled, a Line of Business tab will display on the Material Type Setup screen (Setup > Operations > Material Type) when selecting a material type.

**SYSTEM OPTIONS SETUP** SETUP > SYSTEM > SYSTEM OPTIONS

System | Sales | Integration | Account | **Operations** | Customer Portal | Broker | Online Order

CREATE SERVICE RECORDS IN ADVANCE (DAYS) 45

DUPLICATE LABEL REASON CODE

INVALID WEIGHT REASON CODE

LABEL NOT FOUND REASON CODE

DEFAULT TRANSPORTATION METHOD Truck

IGNORE ROUTE SETUP RESTRICTIONS No

ENABLE MULTIPLE ROUTE LOBS Yes

ENABLE ROUTE CREW MEMBERS No

REQUIRE APPROVAL FOR MANUAL WEIGHTS No

**ENABLE LIMIT MATERIALS TO LOB Yes**

**Mobile Device Settings**

REFRESH INTERVAL (MINS) 5

USER LOCATION INTERVAL (SECS) 15

VIEW NEXT WEEK ROUTES Yes

VIEW LAST WEEK ROUTES No

DRIVE MODE LOW SPEED 25

DRIVE MODE MEDIUM SPEED 40

DRIVE MODE HIGH SPEED 55

DRIVE MODE LOW ZOOM LEVEL 19

DRIVE MODE MEDIUM ZOOM LEVEL 17

DRIVE MODE HIGH ZOOM LEVEL 15

---

**MATERIAL TYPE SETUP** SETUP > OPERATIONS > MATERIAL TYPE

MATERIAL CLASS MSW

ID	NAME	GL SEGMENT	EXTERNAL ID	IDENTIFIER	PACKAGE SIZE	MATERIAL CLASS	UN HAZARDOUS MATERIAL	LEED REPORTA...	COMPOSITION MATERIAL CLASS	DEFAULT UOM	RECYCLA...
MSW	MSW		1		1	MSW	No		MSW	pound	No
TRASH	Trash				1	MSW	Yes		MSW	ton	No

Material Type Value | Conversions | **Lines of Business**

ID	LINE OF BUSINESS	
FEL	Commercial	<input checked="" type="checkbox"/>
DOCDEST	Document Destruction	<input checked="" type="checkbox"/>
HAZ	Hazardous Material	<input checked="" type="checkbox"/>
LF	Inbound and Outbound	<input checked="" type="checkbox"/>
MEDICAL	Medical Waste	<input checked="" type="checkbox"/>
MISC	Miscellaneous	<input type="checkbox"/>
RESI	Residential	<input type="checkbox"/>
RO	Roll Off	<input type="checkbox"/>
SCALE	Scale	<input type="checkbox"/>

## Service Code and Charge Code Updates

In both Service Code Setup and Charge Code Setup, if the above options are configured, the available material type options when adding or editing a code will be restricted based on the selected Line of Business.

**SERVICE CODE SETUP** ADD SERVICE CODE

LINE OF BUSINESS

ID	NAME	LINE OF BUSINESS	MATERIAL TYPE	UOM	TAXABLE	GL ACCOUNT	TEMPORARY SERVICE GL ACCOUNT	PRORATION METHOD	VACATION HOLD PRORATION METHOD	BILL WHILE ON CREDIT HOLD	ACTIVE	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	
FL10R	10 Ya	Commercial	Brick					MSW	Do Not Prorate	Yes	Yes	No	Yes	No	No	No	No	No	No	No	No	No	No
FL10T	10 Ya																						
FL02R	2 Ya																						
FL02T	2 Ya																						
FL02NP	2 Ya																						
FL02VIPR	2 Ya																						
FL02VIPT	2 Ya																						
FL02CDSE	2 YD																						
FL02VCSO	2 YD																						
FL02NWK	2 YD																						
FL02PEOC	2T Tr																						
FL03R	3 Ya																						
FL03T	3 Ya																						
FL03VIPT	3 Ya																						
FL04R	4 Ya																						
FL04T_ANNV	4 Ya																						

Pathways: Setup > Operations > Material Type | Setup > System > System Options | Setup > Services > Service Code; Charge Code

## New Account Template (Setup) - Logic Updated to Bill Group Field in Add/Edit New Account Template (17188)

A change has been made to the Add/Edit New Account Template, removing the limitation that restricted Bill Group selection based on the Division. In Bill Group Setup, if the Division field is left blank, the bill group will be universally available to all divisions in the New Account Template screen.

The screenshot displays the 'NEW ACCOUNT TEMPLATE SETUP' interface. At the top, there is a blue header with a plus icon. Below the header is a table with the following columns: ID, NAME, DIVISION, SALES REP, and SOURCE. The table contains three rows of data:

ID	NAME	DIVISION	SALES REP	SOURCE
1000	Other	HEARNE	House Account - House Accou...	Call In
1001	Houston Accts	HOUSTON	Aliena Somers - Admin-NS (A...	Call In
1002	QA Accts		Aliena Somers - Admin-NS (A...	Call In

An 'EDIT NEW ACCOUNT TEMPLATE' modal window is open over the table. The modal contains the following fields and options:

- NAME: Other
- DIVISION: HEARNE
- SALES REP: House Account - House Account (
- SOURCE: Call In
- ACCOUNT CLASS: RESIDENTIALa
- BILL GROUP: (highlighted in yellow) with a dropdown menu showing 'Annual Billing', 'DAY-ROLF LIBERTY', 'SCALE CASH', 'Test 2', and 'VENDORS'.
- TERM: (empty)
- REBATE PAYMENT TYPE: SCALE CASH
- SERVICE REGION: VENDORS
- TAX REGION: ALAMO HEIGHTS CITY
- SURCHARGE GROUP: Fuel Surcharge 10%

Pathway: Setup > Accounts > New Account / Site Template

## Service Region (Setup) - Logic Updated to 'Default Online Order Sales Rep' Field (17222)

Enhancements to the Service Region Setup screen to restrict the 'Default Online Sales Rep' selection to users with permission 260, 'Assignable as Sales Rep.'

SERVICE REGION SETUP											SETUP > SERVICES > SERVICE REGION		
ID	NAME	DIVISION	REQUIRE SURCHARGE GROUP	DEFAULT SURCHARGE GROUP	GL SEGMENT	MAP AREA	DEFAULT ONLINE ORDER SALESREP	PARENT SERVICE REGION	NEIGHBORHO...	REQUIRE TAX REGION	ALLOW PORTAL SELF REGISTRA...	ACTIVE	
1001	WOODCREEK	DAYTON	No	Fuel Surcharge - R...	SVCD1001	CP-1				Yes	No	Yes	
1002	PARKSIDE AT...	DAYTON	No	Fuel Surcharge - R...	SVCD1002	CP-1	Aliena Somers - Admin-NS (Admin)			Yes	No	Yes	
1003	ATASCA WO...	DAYTON	No	Fuel Surcharge - R...	SVCD1003	CP-1	Chris Fairchild (Sales)			Yes	No	Yes	
1004	ATASCOCITA...	DAYTON	No	Fuel Surcharge - R...	SVCD1004		Deara Nikolouzos - Sales Rep (Sales)			Yes	No	Yes	
1005	KINGS LAKE ...	DAYTON	No	Fuel Surcharge - R...	SVCD1005		Emilio Natarén - Admin-NS (Admin)			Yes	No	Yes	
1006	HUMBLE - N...	DAYTON	No	1234567890...			House Acct non System - House Account (Sales)			Yes	No	No	
1007	ATASCA OAKS	DAYTON	No		SVCD1007	CP-1	Janet Bettcher - Major Account Coordinator (Sales)			Yes	No	Yes	
1008	OAKS OF AT...	DAYTON	No		SVCD1008		Jeff Cecil - Sales (Sales)			Yes	No	Yes	
1009	STILLWATER ...	DAYTON	No	Fuel Surcharge - R...	SVCD1009		Lori Smith - Admin-NS (Admin)			Yes	No	Yes	
1010	KINGWOOD ...	DAYTON	No	Fuel Surcharge - R...	SVCD1010		QAUSR3 TEST3 (Admin)			Yes	No	Yes	
1011	LIBERTY CO...	DAYTON	No		SVCD1011		Rob Tellez - Sales Rep (Sales)			Yes	No	Yes	
1012	THE COMM...	DAYTON	No	Fuel Surcharge - R...	SVCD1012		Scott Fisher			Yes	No	Yes	
1013	PINEY WOODS	DAYTON	No		SVCD1013		Stevan Silva - Sales Rep (Sales)			Yes	No	Yes	
1014	ENCLAVE AT ...	DAYTON	No		SVCD1014					Yes	No	Yes	
15	15	DAYTON	No							No	No	Yes	
CORPUS	CORPUS OPE...	CORPUS	No	Fuel Surcharge - C...	SVCDCORPUS	Corpus Test 1				Yes	Yes	Yes	
DAYTON	DAYTON OP...	DAYTON	No	Fuel Surcharge - R...	SVCCDDAYTON					Yes	No	Yes	
DeleteMe	Delete Me	QAWASTE	No							No	No	No	
DELT	Delete Me	QAWASTE	No							No	No	Yes	

Pathway: Setup > Services > Service Region

### EPA Waste Code (Setup) - Search Bar Added To Screen (17229) [New Feature]

A search bar has been added to the EPA Waste Code Setup screen.

EPA WASTE CODE SETUP										SETUP > OPERATIONS > EPA WASTE CODE		
ID	NAME	ABBREVIATION	LOB	IGNITABLE	TOXIC	CORROSIVE	REACTIVE	ACTIVE				
1000	F001	F001	Hazardous Material	No	No	No	No	Yes				
1001	F002 Non-Halogenated	F002	Medical Waste	No	No	No	No	Yes				
1002	F003	F003	Hazardous Material	No	No	No	No	Yes				
1003	D001	D001	Hazardous Material	Yes	No	No	No	Yes				
1004	D002	D002	Hazardous Material	No	No	Yes	No	Yes				

Pathway: Setup > Operations > EPA Waste Code

### Document Format (Setup) - Update to Prefix Column for Surcharge Rates and Addendums (17233)

In the setup for contracts and proposals, if the 'Prefix' column for `proposal_addendums` is populated, the prefix will now appear as a bold header above the addendums. Additionally, each addendum will now be listed as a separate line item, instead of being grouped by commas as before.

This update has also been applied to `surcharge_rates` for PDF printing.

**DOCUMENT FORMAT SETUP**


Measurements are in points, with 72 points per inch. Page Size = Letter (612 x 792). Left-top of page = (X=0, Y=0). Search

DESCRIPTION	FORM TYPE	NUM OF PAGES	ACTIVE
Proposal	Proposal	1	Active
Service Contract - signature (NEW)	Service Contract	3	Active
Change Form TEST	Services Change Form	1	Active
Test Service Contract	Service Contract	3	Active
Change Form Dayton	Services Change Form	1	Active
Vendor Contract	Vendor Agreement	1	Active

Division LOB Images Fields Terms Text Terms Addendums Signatures

KEY PATH: All Key Paths    PAGE NO:    56

PAGE NUM	KEY PATH	PREFIX	X
1	authorization_usr_id		0
1	authorization_lastupdated		0
1	authorization_note		0
1	status_sub_type		0
1	deposit_calculation		0
1	external_id		0
1	proposal_addendums	Addendum	20
1	surcharge_rates		0



QA Waste Services - HOUSTON  
Houston TX

### Quote

Thank you for your interest in our services! We are eager to serve our local businesses and provide excellent customer service.

**Service Location:**

**Navusoft - Demo**

Service Location Name  
Post Oak Blvd  
Service Address Line 1  
Service Address Line 2

Houston TX 77057  
Service Address City ST Zip

Based on the information you provided we recommend the following service option/s for the above service location:

Qty	Service	Frequency	Monthly Rate
1	20 Yard Compactor Service	1x per week	\$ 85.00 per month

**Addendum**  
Can cancel if business is sold.

Pathway: Setup > Document Formats > Format

### Available Charge Code (Setup) - Changes Not Saving (17257)

An issue has been resolved that prevented changes to the Available Charge Code screen from saving.

AVAILABLE CHARGE CODE SETUP				SETUP > SERVICES > AVAILABLE CHARGE CODE				
LINE OF BUSINESS	DIVISION	EQUIPMENT TYPE	MATERIAL TYPE					
Commercial	HOUSTON	All	All	<input type="text" value="Search"/> <input type="button" value="Q"/> <input type="button" value="X"/> <input type="button" value="R"/>				
CHARGE CODE ↑	MATERIAL TYPE	EQUIPMENT TYPE	AVAILABILITY	DIVISION DEFAULT RATE	UOM	NO CHARGE QUANTITY	MINIMUM TYPE	MINIMUM
Adjustment-Commercial			Specific Service Re...		each		None	
Bulk Pickup	MSW		All Service Regions	\$ 0.00	each		None	
Credit Hold Placement Fee			All Service Regions	\$ 0.00	each		None	
Front Load 02YD Extra Pickup		2 Yard FL	All Service Regions	\$ 0.00	each		None	
Front Load 03YD Extra Pickup		3 Yard FL	All Service Regic	\$ 0.00	each		None	
Front Load 04YD Extra Pickup		4 Yard FL	All Service Regions	\$ 0.00	each		None	
Front Load 06YD Extra Pickup		6 Yard FL	All Service Regions	\$ 0.00	each		None	
Front Load 08YD Extra Pickup		8 Yard FL	All Service Regions	\$ 0.00	each		None	
Front Load 10YD Extra Pickup		10 Yard FL (Ser)	All Service Regions	\$ 0.00	each		None	
Front Load Delivery			All Service Regions	\$ 0.00	each		None	
Front Load Installation Fee			All Service Regions	\$ 0.00	each		None	
Front Load On Call			All Service Regions	\$ 0.00	each		None	
Front Load Relocate			All Service Regions	\$ 0.00	each		None	
Front Load Removal			All Service Regions	\$ 0.00	each		None	
Service Regions								
SERVICE REGION ↑				SERVICE REGION DEFAULT RATE	NO CHARGE QUANTITY	MINIMUM TYPE	MINIMUM	
HOUSTON OPEN MARKET						None		<input type="checkbox"/>
LOS ANGELES								<input type="checkbox"/>

Pathway: Setup > Services > Available Charge Code

## Bundle Setup - Service Region Logic Updated (17253)

The Edit Bundle tool has been updated to restrict Service Region options based on the selected Division.

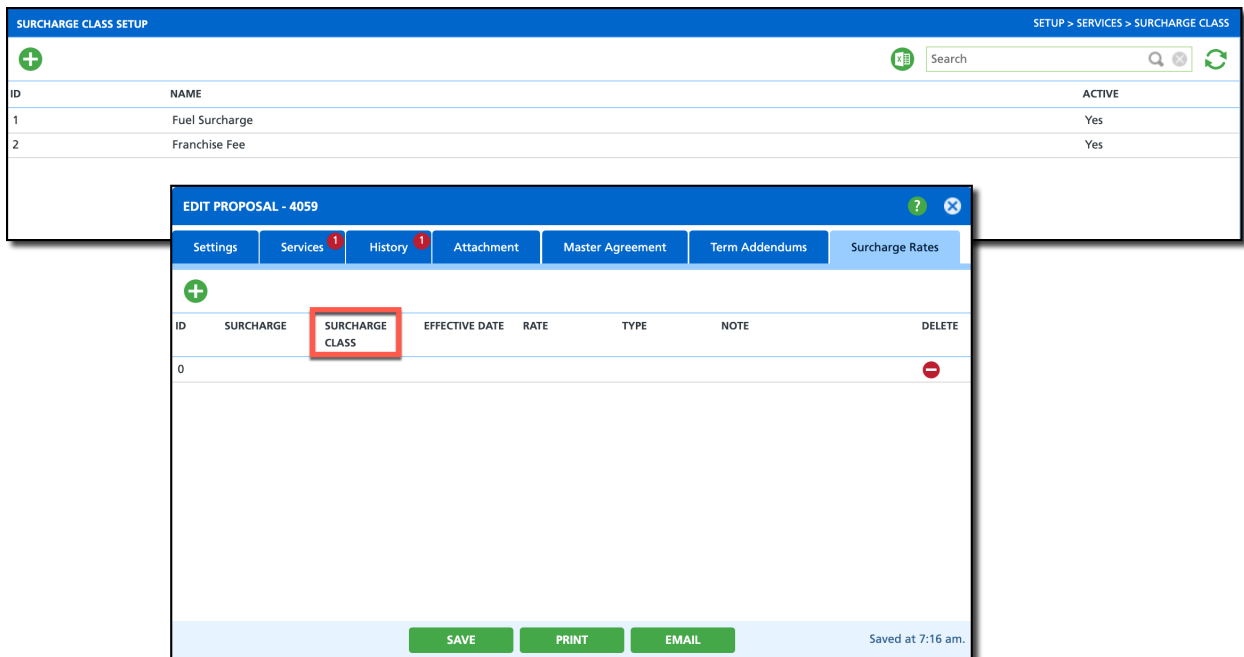
EDIT BUNDLE - 1000			
NAME	<input type="text" value="FCC test online order"/>	ACTIVE	<input type="text" value="Active"/>
DIVISION	<input type="text" value="HOUSTON"/>	SERVICE REGION	<input type="text" value="HOUSTON OPEN MARKET"/>
Bundle Availability			
ONLINE ORDER	<input checked="" type="checkbox"/>	QUICK ORDER	<input type="checkbox"/>
		ADD SERVICE MENU	<input type="checkbox"/>
DOCUMENT FORMAT	<input type="text" value="Change Form Dayton"/>	REQUIRE PREPAYMENT	<input type="text" value="None"/>
DOCUMENT TYPE	<input type="text" value="A-New Customer-1"/>	REQUIRE AUTO PAY ENTROLLMENT	<input type="text" value="Yes"/>
ORDER SOURCE	<input type="text" value="Acquisition"/>	AUTO PAY ENROLLMENT MESSAGE	<input type="text" value="Hello auto pay required"/>
FORCED FUTURE START DATE	<input type="text" value="01/01/2025"/>	Defaults for New Account	
CONTENT IMAGE	<input type="text" value="Select Image..."/> <input type="button" value="BROWSE..."/>	ACCOUNT CLASS	<input type="text" value="RESIDENTIAL"/>
		BILL GROUP	<input type="text" value="HOU-Q1-JAN-APR-JUL-OCT"/>
		TERMS	<input type="text" value="Net 30"/>
<a href="#">COMPLETION MESSAGE</a>		<a href="#">PREVIEW</a>	
<a href="#">SUMMARY</a>		<a href="#">PREVIEW</a>	

Pathway: Setup > Services > Bundle

## Surcharge Class (Setup) - New Surcharge Class Setup Screen Added (17232) [New Feature]

A new Surcharge Class setup screen has been added to help organize surcharges into classes. The Surcharge Class will now appear in the following screens:

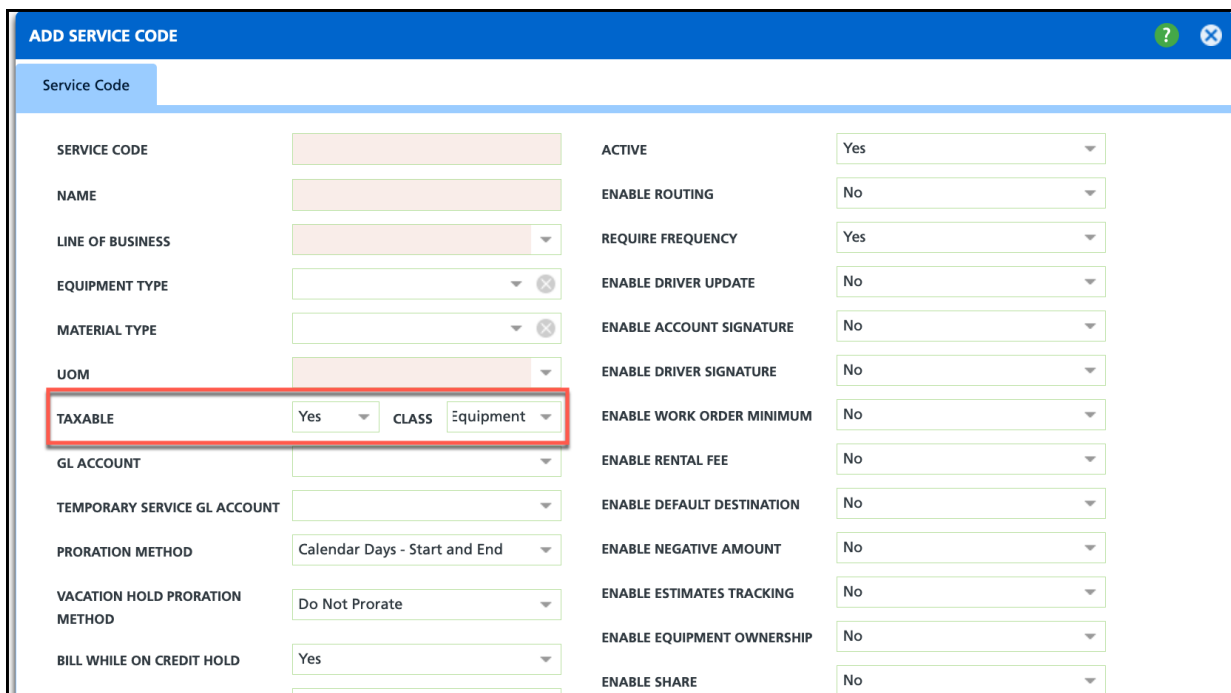
- Add/Edit Surcharge Setup and Surcharge Rates
- Contracts and Proposals Surcharge Rates tab



Pathway: Setup > System > Surcharge Class

### Service Code Setup (Setup) - Unable To Select Tax Class When Field Is Enabled (17217)

Previously, when adding a new service code in the Service Code setup, the list of Tax Class options would not display when the 'Taxable' field was enabled. This has been resolved.



Pathway: Setup > Services > Service Code

### Account Class (Setup) - Credit Hold Removal Process Reverted to Process at Specified Time (17299)

Automatic Credit Hold Removal has been reverted to process only during the hour defined in the Account Class settings.

? X
**UPDATE ACCOUNT CLASS**

Details	Customer Portal	Payment Processing	Status Management	Finance Charges and Other Fees
ENABLE AUTOMATIC STATUS UPDATE	Yes			
AUTO CREDIT HOLD PAST DUE DAYS	99999			
AUTO CREDIT HOLD MINIMUM PAST DUE AMOUNT	99999.00			
AUTO INACTIVE ACCOUNT/SITE DAYS	60			
AUTO CREDIT HOLD PLACEMENT	No			
AUTO CREDIT HOLD REMOVAL	Yes			
STATUS UPDATE TIME	12 PM			
	Central America Standard Time			
RUN DAILY AUTO APPLY	Yes			

Pathway: Setup > Account > Account Class > Status Management (tab)

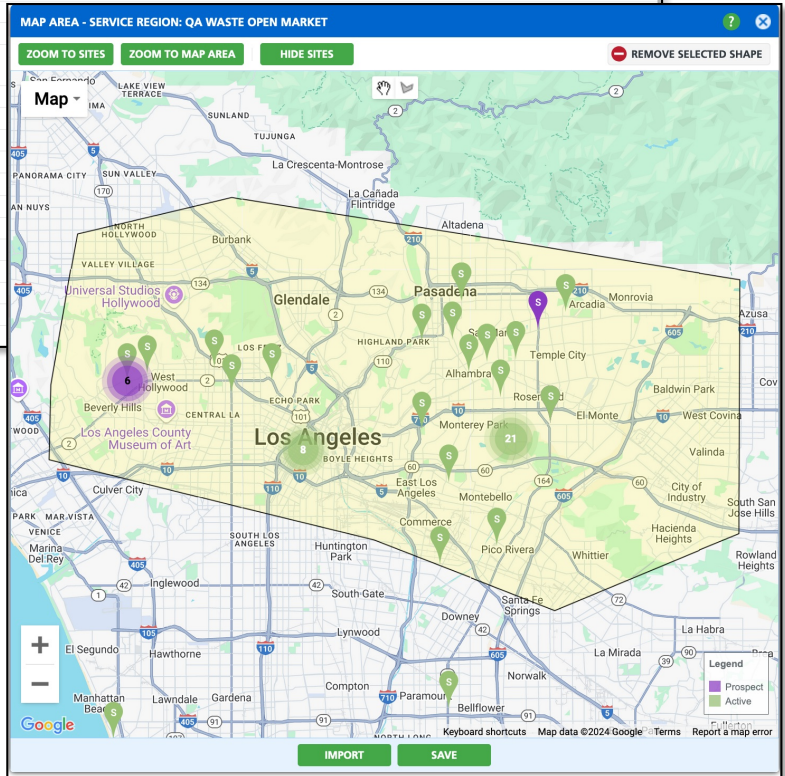
### Service Region (Setup) - Setup for Default Service Region and Tax Region (17446) [New Feature]

Service Region and Tax Region setup screens now include a mapping feature for purposes of creating default settings for new accounts and sites. The following logic applies to support this change:

- o When creating a new account or site without using a 'New Account Template' or 'New Site Template,' the system automatically assigns the 'Service Region' and 'Tax Region' based on defined map areas if the address falls within a specified perimeter. If a template is used, default 'Service Region' and 'Tax Region' values are applied independently of map settings.

Further documentation can be reviewed here: [Service Region Setup](#) and [Tax Setup](#)

ID ↑	NAME	DIVISION	REQUIRE SURCHARGE GROUP	DEFAULT SURCHARGE GROUP	GL SEGMENT
1001	WOODCREEK	DAYTON	Yes	Fuel Surcharge - Residential	SVCD1001
1002	PARKSIDE AT KW GLEN	DAYTON	No	Fuel Surcharge - Residential	SVCD1002
1003	ATASCA WOODS	DAYTON			
1004	ATASCOCITA NORTH	DAYTON			
1005	KINGS LAKE ESTATES	DAYTON			
LA	LOS ANGELES	HOUSTON			
OC	Orange County	QAWASTE			
PRLD_MUNI	PEARLAND MUNICIPAL	HOUSTON			
QASVCREG	QA Service Region 2	QAWASTE			
QAWASTE	QA Waste OPEN MARKET	QAWASTE			
SANDIEGO	SD	QAWASTE			
1012	THE COMMONS	DAYTON			
1013	PINEY WOODS	DAYTON			
1014	ENCLAVE AT OLDE OAKS	DAYTON			
15	15	DAYTON			
BUNN	Bunn NC	QAWASTE			
CORPUS	CORPUS OPEN MARKET	CORPUS			
DAYTON	DAYTON OPEN MARKET	DAYTON			



Pathways: Setup > Accounting > Tax Region | Setup > Services > Service Region

### GL Segmentation (Setup/Accounting) - Franchise Fees Segmentation Added (17448)

The GL Segmentation Setup screen now includes a Franchise Fee segmentation option. Further information on GL Segmentation Setup can be reviewed here: [GL Segmentation Setup](#).

**GL SEGMENTATION SETUP**

ACTIVE Active FILLER '0' SEPARATOR -

Any modifications to segmentation will be applied to new transactions.

**AR**

	LENGTH	SOURCE
SEGMENT 1	15	Account Class
SEGMENT 2	14	Division
SEGMENT 3		None

**Write Off**

	LENGTH	SOURCE
SEGMENT 1	5	Division
SEGMENT 2	7	Transaction GL account
SEGMENT 3	4	Account Class

**Unearned Revenue**

	LENGTH	SOURCE
SEGMENT 1	5	ServiceRegion
SEGMENT 2	5	Transaction GL account
SEGMENT 3	4	Line of Business
SEGMENT 4	8	Division

**Revenue**

	LENGTH	SOURCE
SEGMENT 1	5	Transaction GL account
SEGMENT 2	4	Division
SEGMENT 3	4	Line of Business
SEGMENT 4	3	ServiceRegion

**Surcharge**


	LENGTH	SOURCE
SEGMENT 1	5	Transaction GL account
SEGMENT 2	4	Division
SEGMENT 3	4	Line of Business
SEGMENT 4		

**Tax**

	LENGTH	SOURCE
SEGMENT 1	5	Transaction GL account
SEGMENT 2	6	Division
SEGMENT 3	4	Site Class
SEGMENT 4		
SEGMENT 5		

**Franchise Fees**

	LENGTH	SOURCE
SEGMENT 1	4	Transaction GL account
SEGMENT 2	2	Division
SEGMENT 3	3	Line of Business
SEGMENT 4		
SEGMENT 5		



Pathway: Setup > Accounting > GL Segmentation

### Route Setup (Setup/Operations) - Label Changed for Primary Line of Business (17533) [New Feature]

In Route Setup, the **Line of Business** label in Update Route has been renamed to **Primary Line of Business**. This label now appears in the Line of Business tab to clearly indicate the primary line of business for a route. Additionally, a count of all active site service records (those not ended) is displayed for each line of business with assigned routes.

Pathway: Setup > Operations > Route

### GL Segmentation Setup (Accounting Setup) - Segment Length Increased (17517)

GL Segmentation has been updated to limit the total length, including separators, to a maximum of 30 characters.

Pathway: Setup > Accounting > GL Segmentation

### Tax Setup (Accounting Setup) - Tax Rate to Allow 4 Decimals (17627)

The Rate field in the Tax Rate tab of the Tax Region Setup screen has been updated to support up to four decimal

places.

The screenshot displays the 'TAX REGION SETUP' interface. At the top, there is a blue header with a green plus icon. Below it is a table with two columns: 'TAX REGION ID' and 'NAME'. The table lists six entries with IDs 1000 through 1006 and names such as 'AUSTIN CITY-MTA-ETGW' and 'BLANCO ESD 1 BSLD'. A blue 'Tax Rate' button is located below the table. Below the button is another table with columns 'TAX', 'LEVEL', and 'TYPE'. This table lists 'TEXAS STATE', 'HAYS COUNTY', 'HAYS CO ESD 4', and 'AGUA DULCE CITY', all with 'Tax' as the level and 'Percentage %' as the type. A red arrow points from the 'AGUA DULCE CITY' row to a modal window titled 'ADD / EDIT TAX RATE'. The modal window has a blue header with a green plus icon, a question mark, and a close button. It contains the following fields: 'TAX REGION' (set to 'HAYS ESD 4'), 'TAX' (a dropdown menu), 'EFFECTIVE DATE' (a date picker), and 'RATE' (a spinner set to '1.2345'). A 'SAVE' button is at the bottom of the modal.

TAX REGION ID	NAME
1000	AUSTIN CITY-MTA-ETGW
1001	BLANCO ESD 1 BSLD
1002	BLANCO CO ESD 2 BSLD
1003	COMAL CO ESD 7
1004	CALDWELL COUNTY
1005	CALDWELL CO ESD 1-A
1006	CALDWELL CO ESD 2

TAX	LEVEL	TYPE
TEXAS STATE	Tax	Percentage %
HAYS COUNTY		Percentage %
HAYS CO ESD 4		Percentage %
AGUA DULCE CITY		Percentage %

## Role/Division (Setup) - Logic Updated for Invoice Adjustment Limit and Approval Limit (17607, 17740)

The rules for *Invoice Adjustment Limit*, *Adjustment Approval Limit*, and *Amount Requiring Two Approvals* have been updated to clarify which limit applies where.

### Invoice Adjustment

Pathway: *Customer Service (screen) > AR History > View Details / Adjust Invoice*

AR HISTORY						
CURRENT	1-30 DAYS	31-60 DAYS	61-90 DAYS	91-120 DAYS	120+ DAYS	TOTAL
-146.31	0.00	0.00	0.00	0.00	10,269.69	10,123.38

INVOICE ADJUSTMENT - 903631 - 5/1/24 - \$ 10,265.10 - CREATED BY ALIENA SOMERS ON 1/6/25 12:04 PM										
REASON CODE	PERIOD	NOTE								
Incorrect Price	2025-01									
CREDIT ENTIRE INVOICE <input type="checkbox"/>										
Search										
DATE	SITE ID	SITE NAME	WO #	QUANTITY	DESCRIPTION	INVOICE AMOUNT	PREVIOUS ADJUSTME...	PENDING ADJUSTME...	REJECTED ADJUSTME...	ADJUSTMENT AMOUNT
05/01/24	43358001	888 CHINESE RES...			TEXAS STATE	\$ 4.28	\$ 0.00	\$ 0.00	\$ 0.00	
03/01/23 - 03/31...	43358001	888 CHINESE RES...		1	6 Yard Trash Serv...	\$ 435.74	\$ 0.00	\$ 0.00	\$ 0.00	\$(400.00)
05/01/24	43358001	888 CHINESE RES...			BRAZORIA COUN...	\$ 2.18	\$ 0.00	\$ 0.00	\$ 0.00	\$(2.01)
05/01/24	43358001	888 CHINESE RES...			PEARLAND CITY	\$ 6.54	\$ 0.00	\$ 0.00	\$ 0.00	\$(6.02)
05/01/24	43358001	888 CHINESE RES...			TEXAS STATE	\$ 27.23	\$ 0.00	\$ 0.00	\$ 0.00	\$(25.05)
03/01/23 - 03/31...	43358001	888 CHINESE RES...		1	Enclosure	\$ 68.46	\$ 0.00	\$ 0.00	\$ 0.00	
05/01/24	43358001	888 CHINESE RES...			BRAZORIA COUN...	\$ 0.34	\$ 0.00	\$ 0.00	\$ 0.00	
05/01/24	43358001	888 CHINESE RES...			PEARLAND CITY	\$ 1.03	\$ 0.00	\$ 0.00	\$ 0.00	
05/01/24	43358001	888 CHINESE RES...			TEXAS STATE	\$ 4.28	\$ 0.00	\$ 0.00	\$ 0.00	
04/01/23 - 04/30...	43358001	888 CHINESE RES...		1	6 Yard Trash Serv...	\$ 435.74	\$ 0.00	\$ 0.00	\$ 0.00	
05/01/24	43358001	888 CHINESE RES...			BRAZORIA COUN...	\$ 2.18	\$ 0.00	\$ 0.00	\$ 0.00	
05/01/24	43358001	888 CHINESE RES...			PEARLAND CITY	\$ 6.54	\$ 0.00	\$ 0.00	\$ 0.00	
<b>TOTAL</b>										<b>\$(433.08)</b>

**POST**

## Logic Update

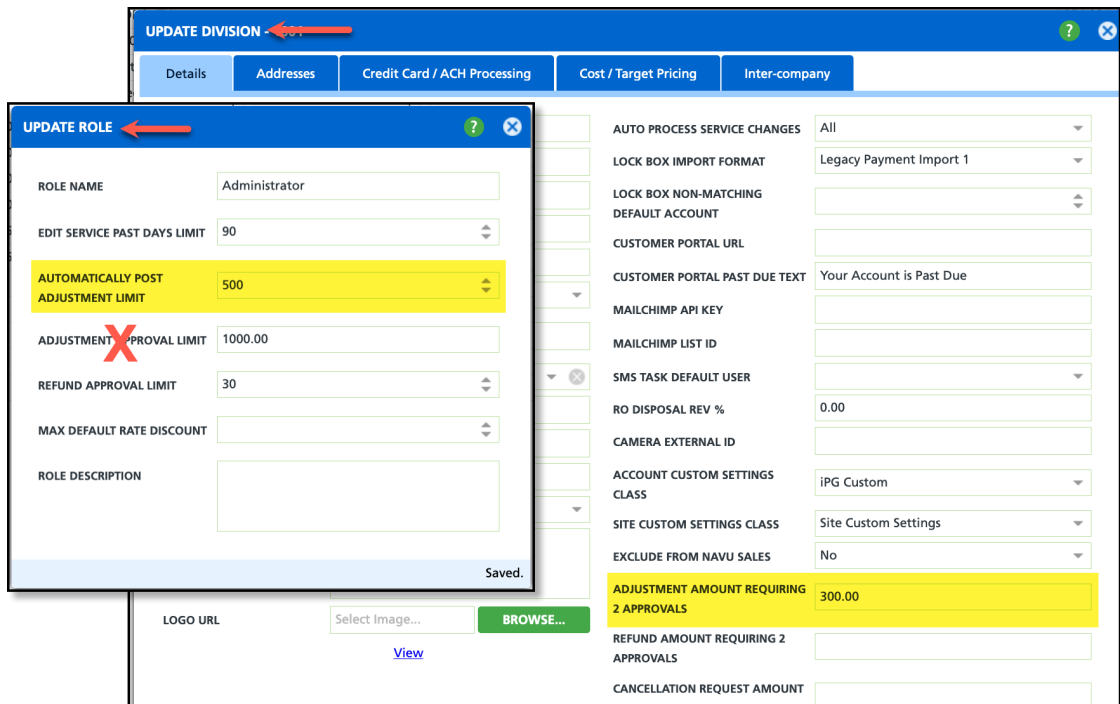
In the Invoice Adjustment screen of AR History, invoice adjustments will only use the following two settings in Role and Division setup:

### 1. Role Setup: Automatically Post Adjustment Limit

- Sets the maximum amount a user can post for an invoice adjustment. If this field is left empty, no limit applies. If an entered adjustment meets or exceeds this value, a message will notify the user of the limit, and the adjustment will not be posted.

### 2. Division Setup: Adjustment Amount Requiring 2 Approvals

- Requires 2 approvals for posted adjustments that are equal to or greater than the amount entered here. If a user enters an adjustment within the posting limits defined in Role Setup and meets or exceeds this threshold, the post option will be available. However, a notification will alert the user that two approvals are required before posting. The second approval is captured in *Accounting > Invoice Adjustment - Pending Approval and History*.



## Adjustment History and Pending Approval

Pathway: Accounting > Invoice Adjustment - Pending Approval and History



Logic updates here also extended to the Pre-Billing Workflow's Pending Approval Adjustments screen in Accounting > Billing.

ADJUSTMENT ID	DIVISION	ACCOUNT	ACCOUNT NAME	INVOICE	AMOUNT	REASON CODE	DATE	USER	
Count: 6				Total Amount:	\$(1,960.27)				
11428	CORPUS	33246	WASTE MGMT - HEB ST...	837056	\$(102.07)	COURTESY	11/06/24	Matthew Van ...	Edit ✓ ✗
		Requires 2 Approvals Note: notes							
11370	QAWASTE	49050	Nothing Bundt Cakes	895475	\$(90.00)	INV_PRICE	06/13/24	Test2 Dispatch...	Edit ✓ ✗
11473	HOUSTON	46465	RUBICON	899734	\$(898.04)	WRITE_OFF	12/17/24	Aliena Somers ...	Edit ✓ ✗
		Requires 2 Approvals							
11453	QAWASTE	49101	IKEA	900159	\$(85.00)	ADJ-TEST	11/25/24	David Navarro ...	Edit ✓ ✗
11386	QAWASTE	49096	Food4Less	901052	\$(352.08)	ADJ-TEST	07/19/24	Aliena Somers ...	Edit ✓ ✗
		Requires 2 Approvals - First Approval - Aliena Somers - Admin-NS (Admin) at 7/19/24 8:23 am							
11485	QAWASTE	43358	CHINESE CORPORATE	903631	\$(433.08)	INV_PRICE	01/06/25	Aliena Somers ...	Edit ✓ ✗
		Requires 2 Approvals							

## Logic Update

The following logic was updated to the Adjustment History and Pending Approval screen:

### 1. Role Setup: Adjustment Approval Limit

- Sets the maximum amount a user can **approve** an invoice adjustment by and hides the approve, deny, and edit options for pending adjustments on the Adjustment History and Pending Approval screen if the adjustment exceeds the user's approval limit set here.
  - The logic for the approve button has been updated to align with the Adjustment Approval Limit specified here. When a user approves an adjustment by selecting the check mark, they will be designated as the first or second approver, depending on the

context.

## 2. Division Setup: Adjustment Amount Requiring 2 Approvals

- Requires 2 approvals for posted adjustments that are equal to, or greater than the amount entered here. If no value is entered, this requirement does not apply.

**UPDATE DIVISION**

Details | **Addresses** | Credit Card / ACH Processing | Cost / Target Pricing | Inter-company

**UPDATE ROLE**

ROLE NAME: Administrator

EDIT SERVICE PAST DAYS LIMIT: 90

AUTOMATICALLY POST ADJUSTMENT LIMIT: 500

**ADJUSTMENT APPROVAL LIMIT: 1000.00**

REFUND APPROVAL LIMIT: 30

MAX DEFAULT RATE DISCOUNT

ROLE DESCRIPTION

LOGO URL: Select Image... **BROWSE...** [View](#)

**ADJUSTMENT AMOUNT REQUIRING 2 APPROVALS: 300.00**

REFUND AMOUNT REQUIRING 2 APPROVALS

CANCELLATION REQUEST AMOUNT REQUIRING 2 SAVE ATTEMPTS

AUTO PROCESS SERVICE CHANGES: All

LOCK BOX IMPORT FORMAT: Legacy Payment Import 1

LOCK BOX NON-MATCHING DEFAULT ACCOUNT

CUSTOMER PORTAL URL

CUSTOMER PORTAL PAST DUE TEXT: Your Account is Past Due

MAILCHIMP API KEY

MAILCHIMP LIST ID

SMS TASK DEFAULT USER

RO DISPOSAL REV %: 0.00

CAMERA EXTERNAL ID

ACCOUNT CUSTOM SETTINGS CLASS: iPG Custom

SITE CUSTOM SETTINGS CLASS: Site Custom Settings

EXCLUDE FROM NAVU SALES: No

## Account Notification (Notification Template Setup) - Addition of Billing Address Information (17382) [New Feature]

The following division billing address information has been added to Account Statement notification template options:

1. division.billingaddress.line1
2. division.billingaddress.line2
3. division.billingaddress.city
4. division.billingaddress.state
5. division.billingaddress.postalcode
6. billinggroup.invoice\_from\_email

EDIT NOTIFICATION TEMPLATE
?
✕

TYPE Account Statement
 NAME New Statement
 ACTIVE Yes

RESPONSE REQUEST TYPE  

Email Design
Text Message Design

DEFAULT SUBJECT New Statement
 CONTENT TYPE text/html

DEFAULT MESSAGE [PREVIEW](#)
KEY PATHS

Bill Group Email: @@billgroup.invoice_from_email;; Division Billing Address Line 1: @@division.billingaddress.addressline1;; Division Billing Address Line 2: @@division.billingaddress.addressline2;; Division Billing Address City: @@division.billingaddress.city;; Division Billing Address State: @@division.billingaddress.state;; Division Billing Postal: @@division.billingaddress.postalcode;;	<ul style="list-style-type: none"> <li>account.billingaddress.addressline1</li> <li>account.billingaddress.addressline2</li> <li>account.billingaddress.city</li> <li>account.billingaddress.postalcode</li> <li>account.billingaddress.state</li> <li>account.name</li> <li>account.name2</li> <li>account_id</li> <li>billgroup.invoice_from_email</li> <li>division.addressline1</li> <li>division.addressline2</li> <li>division.billingaddress.addressline2</li> <li>division.billingaddress.postalcode</li> <li>division.billingaddress.state</li> <li>division.city</li> <li>division.dbaname</li> </ul>
---	---

SAVE

Pathway: Setup > System > Notification Template

### Service Code (Setup) - New Billing Setting Added (17556) [New Feature]

A 'Do Not Bill Until Delivery Completed' field has been added to the Service Code Setup screen. When set to 'Yes,' billing for the service is restricted until the delivery work order is marked as 'Service Completed.'

Pathway: Setup > Services > Service Code

### Material Type (Setup) - New Line of Business Filter Added (17808) [New Feature]

A **Line of Business** filter option has been added to the **Material Type Setup** screen. This filter will only appear if the new **Enabled Limit Materials to LOB** setting in **System Options** is set to "Yes."

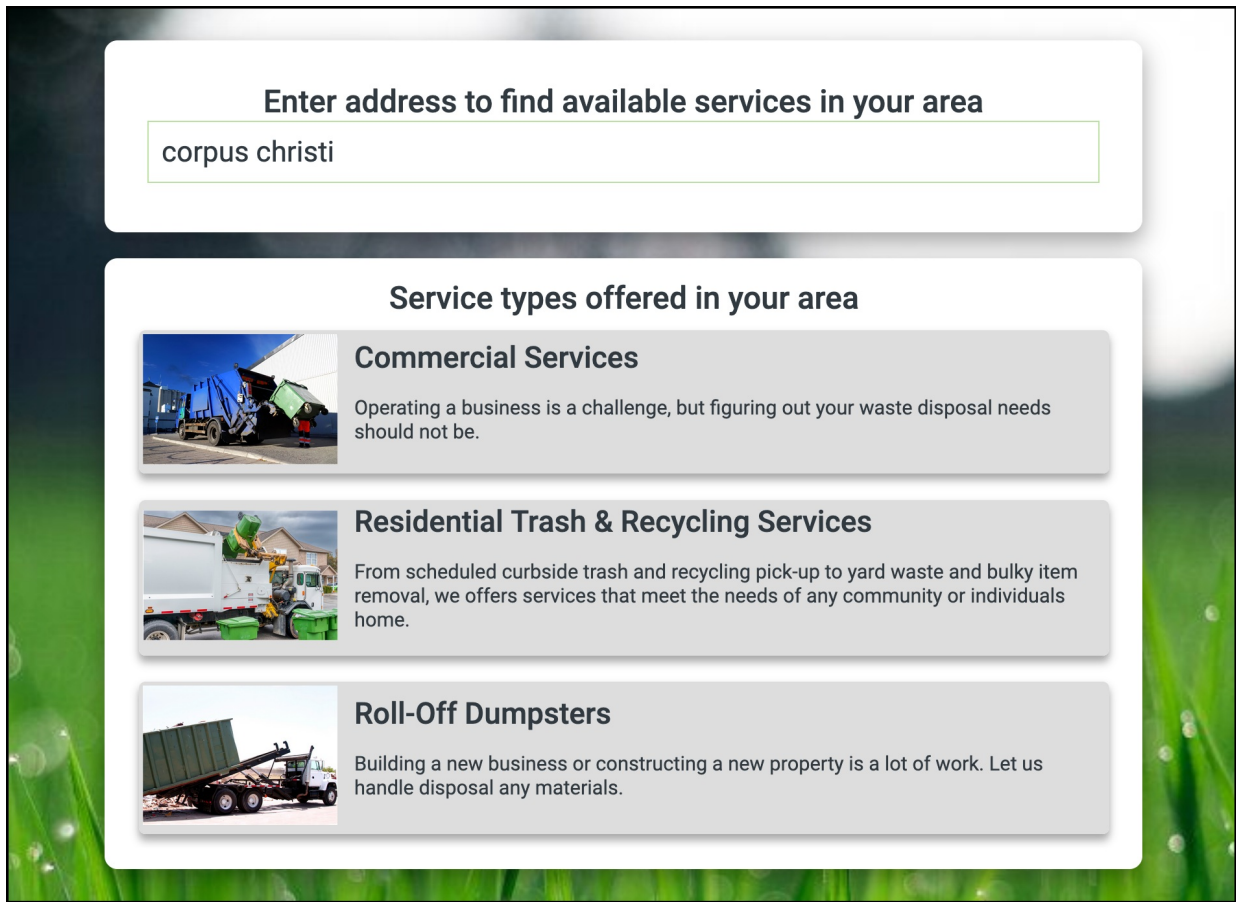
ID	NAME	GL SEGMENT	EXTERNAL ID	IDENTIFIER	PACKAGE SIZE	MATERIAL CLASS	PROFIED MATERIAL	UN HAZARDOUS MATERIAL
BRICK	Brick				1	C&D	No	
BRUSH	Brush				1	RECYCLE	No	
CLEARGLS	Clear Glass				1	GLASS	No	
COLORGLS	Colored Glass				1	GLASS	No	
METAL	Metal				1	RECYCLE	No	
MSW	MSW		2		1	MSW	No	
OCC	Cardboard				1	RECYCLE	No	
TRASH	Trash				1	MSW	No	

Pathway: Setup > Operations > Material Type | Setup > System > System Options > Operations [tab]

### Service Bundle (Setup) - New Feature Online Order and Quick Order [New Feature]

The Online Order and Quick Order service bundle feature is available in the Version 74 release. Review the

documentation linked at the bottom of this page for setup instructions and best practices to optimize its use.





The screenshot shows a user interface for selecting services in Corpus Christi. It features three main sections: a search bar with the text 'corpus christi', a section titled 'Service types offered in your area' containing three service options, and a background image of green grass.


**Enter address to find available services in your area**

corpus christi

**Service types offered in your area**

**Commercial Services**  
 Operating a business is a challenge, but figuring out your waste disposal needs should not be.

**Residential Trash & Recycling Services**  
 From scheduled curbside trash and recycling pick-up to yard waste and bulky item removal, we offers services that meet the needs of any community or individuals home.

**Roll-Off Dumpsters**  
 Building a new business or constructing a new property is a lot of work. Let us handle disposal any materials.

Article: [Service Bundle/Online Order Setup](#)

### **Reason Code (Setup) - Added Option to Enable Vendor at the Reason Code Level (16973)**

A new "Enable Vendor" field has been added to Reason Code Setup, appearing only for Add Service and Update Service reason codes. On the Add and Edit Active Service screen, vendor fields will be displayed if the vendor is enabled for both the reason code and the service code.

**ADD ACTIVE SERVICE**

REASON CODE: NEW VENDOR START DATE: 02/20/25 Thursday Week 8 (A) 8 per cubic yard (new)

QTY: 1 EQUIPMENT: 8 Yard FL SERVICE CODE: 8 Yard Trash Service FREQUENCY: 1x per week PER UNIT: 277.1200 SERVICE FEES: 277.12 month

VENDOR: [ ] VENDOR RATE: [ ]

SERVICE DAYS:  M  T  W  H  F  S  Su

REQUESTED BY: [ ]

SERVICE NOTES: [ ]

FL Delivery ROUTE: [ ]

WORK ORDER NOTES: [ ]

**EDIT REASON CODE**

TYPE: Update Service

ID: CHG\_PD

NAME: CHG-Price Decrease

EXTERNAL ID: [ ]

SALES RESULTS REPORT TYPE: Decreased

IS NEW OWNER: No

IS OLD OWNER: No

APPLY 1085 RULE: No

EXCLUDE FROM 1085: No

EXCLUDE FROM COMMISSION: No

ENABLE TEMPORARY SERVICE: No

**ENABLE VENDOR: No**

ACTIVE: Yes

Pathway: Setup > System > Reason Code

## Database

### Database (Import) - Import Matrex Scale Tickets Added (17055) [New Feature]



Import Matrex Scale Tickets is a specific import designed for third-party integration.

A new import option, 'Import Matrex Scale Tickets,' has been added to the Database module. To import, the following is required:

- o The file must be in CSV format
- o The user must have the permission 462 (Import Matrex Scale Tickets).

Once imported, Matrex Scale Tickets will display on the work order associated with the ticket.

The screenshot displays a software interface with a sidebar on the left and a main content area. The sidebar contains a vertical list of menu items: HOME, ACCOUNTS, SALES, OPERATIONS, ACCOUNTING, REPORTS, DASHBOARD, SETUP, and DATABASE. The DATABASE menu is expanded, showing a list of options including 'Import', 'Import Mapping', 'Merge Sites', 'Notification History and Block List', 'Recalculate Dashboard Data', 'ReCollect Data Export', 'Request Audit', 'Send Alert Notification', 'Send Bulk Customer Portal Invites', 'Send Bulk Emails', and 'User Data Transfer'. The 'Import' option is highlighted, and a sub-menu is open, listing: 'Import Account/Site Info', 'Import Credit Card Accounts', 'Import Fuel Record', 'Import Manual Charges', 'Import Matrex Scale Tickets', 'Import Paycom Payroll Import', 'Import Services', and 'Import User'. The 'Import Matrex Scale Tickets' option is highlighted in green. A red arrow points from this option to a modal window titled 'IMPORT MATREX SCALE TICKETS'. The modal window contains a 'SELECT FILE' section with a 'Select File...' input field and a 'BROWSE...' button. At the bottom of the modal is an 'IMPORT' button. The main content area at the top is divided into five columns: REQUESTS, TASKS, QUOTES/CONTRACTS, APPOINTMENTS, and ACTIVITIES. The REQUESTS column shows items like 'Damage Navusoft Premier Waste And Recycling Hold - 192 days old' and 'Billing Error LARRY B Open - 143 days old'. The TASKS column shows 'Aug 30 2024 Initial Contact Pauleen Horn'. The QUOTES/CONTRACTS column shows 'FoodLess A-New Business-Acquisition \$ 320.00', 'Studio A A-New Business-New Owner \$ 130.00', and 'Polly Pie 2 New Business Vendor \$ 100.00'.

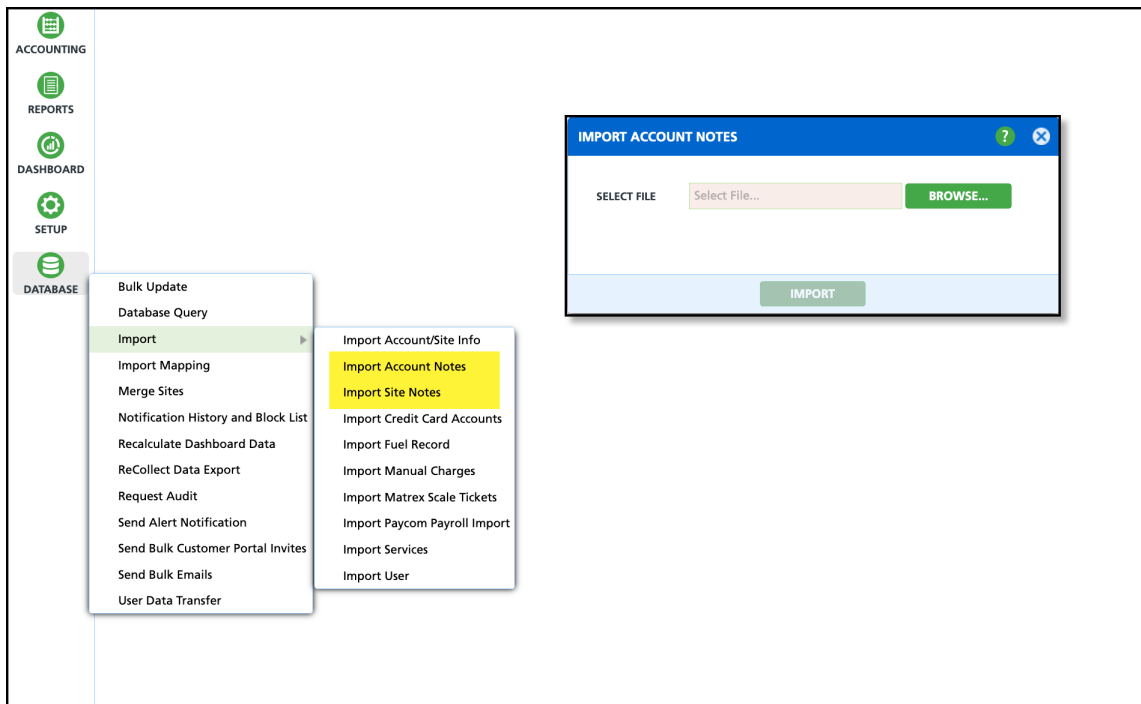
Pathway: Database > Import > Import Matrex Scale Tickets

### Import (Database) - Import Account Notes and Import Site Notes (17618) [New Feature]

Two new import options—Import Account Notes and Import Site Notes—have been added to the Database module. These import options are visible only to authorized users. To support this feature, two new permissions have also been introduced. Review the roles best suited for these permissions and update their status to 'Authorized' to grant access to users in those roles. Additional documentation on importing Account or Site Notes is available in the article linked at the bottom of this release note.

#### New Permissions to Review:

- o 470 - Import Account Notes
- o 471 - Import Site Notes

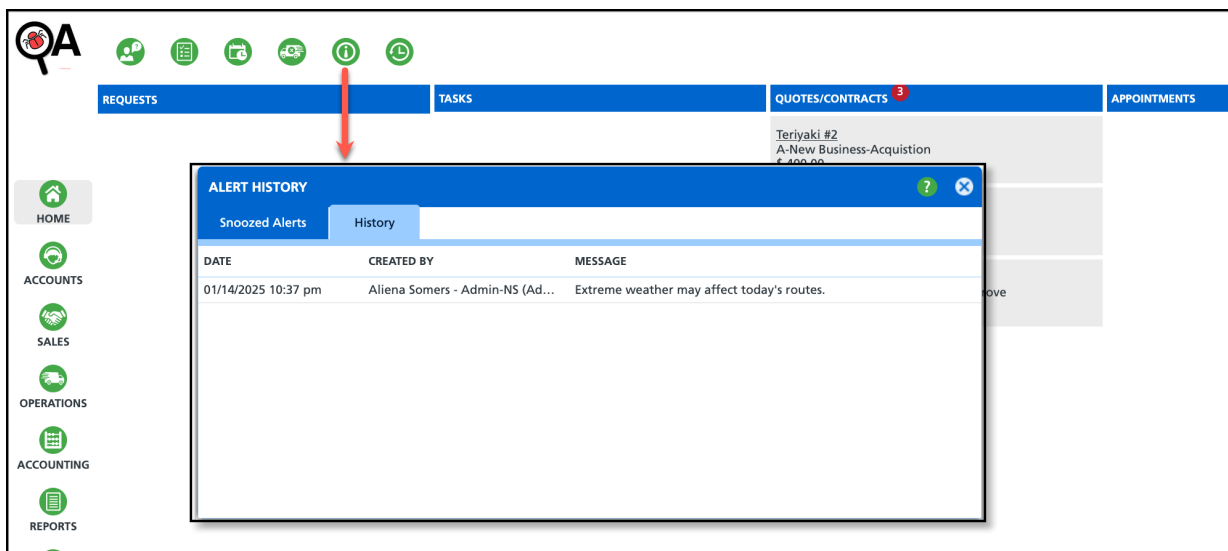


Pathway: Database > Import Account Notes; Import Site Notes | Setup > System > Role  
 Article Link: [Import Account or Site Notes](#)

## Snoozed Alerts (Alerts) - Updates to Snoozed Alerts (17164) [New Feature]

The following updates have been made to Snoozed Alerts:

1. Snoozed Alerts has been renamed to "Alert History."
2. The Alert History screen has been split into two tabs:
  - **Snoozed Alerts:** Displays alerts that have been snoozed. Alerts in this section can be marked as "Read" by selecting the "Mark Alert as Read" icon.
  - **History:** Displays the 30 most recent alerts that have been marked as "Read."



Pathway: Alerts (icon)

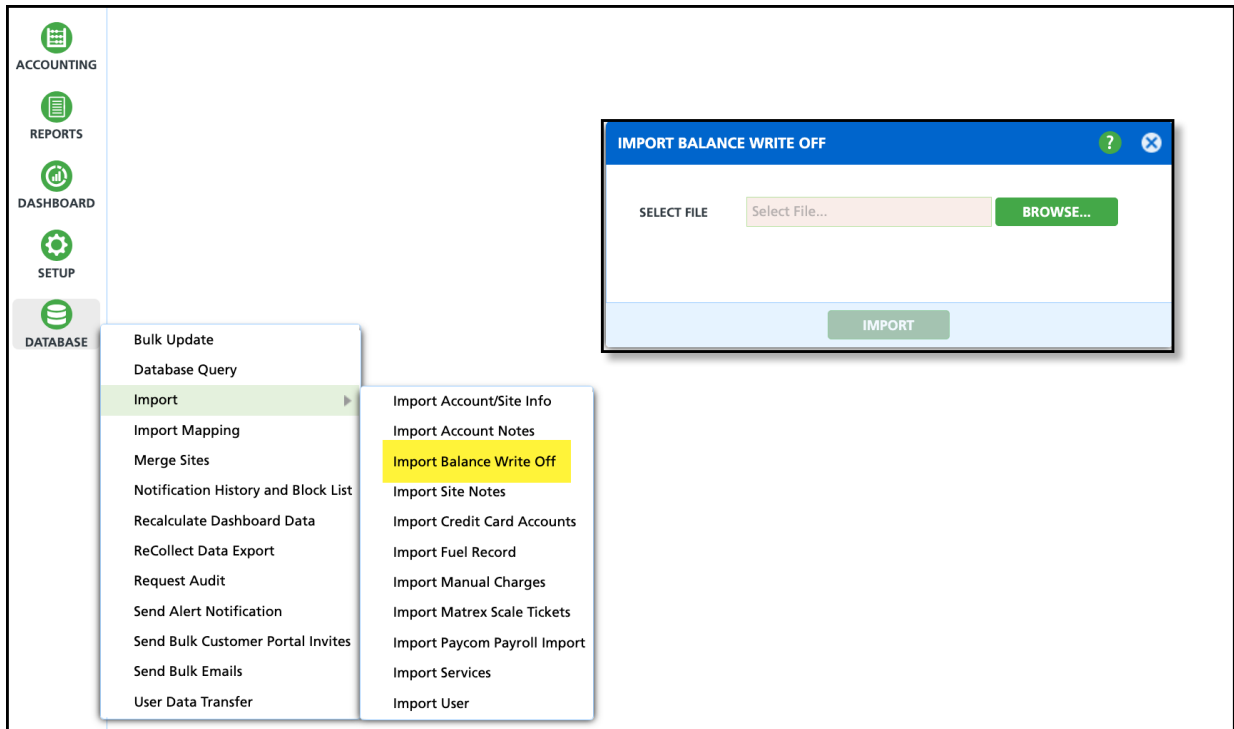
Articles: [Send Alert Notification](#)

## Import Balance Write Off (Database) - New Import Feature (17782) [New Feature]

A new import option, **Import Balance Write-Off**, has been added to the Database module. This feature is accessible only to users with the appropriate authorization.

To enable this functionality, a new permission– **473 (Import Balance Write Off)**– has been introduced. Review the roles that require access to this feature and update their status to **Authorized** as needed.

For detailed instructions and additional information, refer to the linked article below.



**Pathway:** Database > Import > Import Balance Write Off

**Article:** [Import Balance Write Off](#)