

# Release Version 74 [Archive]

Last Modified on 12/08/2025 1:11 pm PST



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

## 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 <a href="#">Navusoft Premier Waste And...</a> Open - 145 days old			Feb 09 8:00 am test	Today	
				12:06 pm	Site Viewed
				12:05 pm	Site Viewed
Cancellation: Service <a href="#">Example Site 1</a> 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.

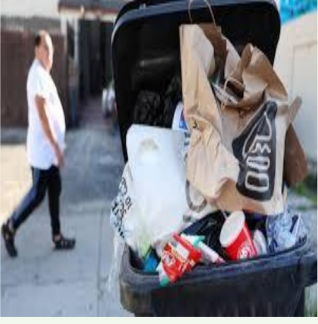
REQUESTS	TASKS	QUOTES/CONTRACTS	APPOINTMENTS
Please call me <a href="#">Navusoft Premier Waste And Recycling</a> Open - 160 days old			Feb 09 2024 8:00 am test
Cancellation: Service <a href="#">Example Site 1</a> Received - 15 days old			Feb 12 2024 9:00 am test

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																					
<div>Account is significantly past due</div> <div>Service exception WO# 7871256 scheduled Monday, July 1, 2024 - Bin Overloaded</div>		<div>9310 DAMAGE House Acct non Sys... 03/11/2024 Testing Task</div> <div>1561 Damage Test2 Dispatcher User 06/14/2024 5:13 pm Testing NAVU-16928</div> <div>non 06/28/2024 5:31 pm This is a request for vacation hold</div> <div>on Sys... 06/26/2024</div> <div>non 07/01/2024</div> <div>z 05/20/2024 Amount: \$ 35.00 , Note: Manual Char</div> <div>z 05/23/2024 Amount: \$ 35.00 , Note: Manual Char</div> <div>s 06/17/2024</div>																					
<div>ACTIVE SERVICES (4)</div> <div>Notes</div> <table><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)	<div></div> <div>\$ 780.05</div> <table><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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888 CHINESE RESTAURANT 1325 BROADWAY ST	\$ 100.00 per month																						
<div>CALENDAR</div> <div>July, 2024</div> <div>EVENTS</div> <div>Appointment, AR, Cancellation, Complaint, Ei</div>																							
SUN MON TUE WED THU FRI		JUN 30 JUL 1 JUL 2 JUL 3 JUL 4 JUL 5																					

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



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 DATE06/24/2024

INVOICE DATE07/24/2024

Arrears - Monthly  
Billed Thru Date Jul 31, 2024  
Next Invoice Date Jul 05, 2024 BATCH-25874 (not started)

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

CREATE ACCOUNT

ACCOUNTS > ADD ACCOUNT

STATUS	SOURCE	ACCOUNT DIVISION	SITE DIVISION	ACCOUNT CLASS
	Call In	HEARNE	HEARNE	RESIDENTIAL

Service Address

NAME  
NAME 2  
ADDRESS LINE 1  
ADDRESS LINE 2  
CITY/STATE/POSTAL CODE  
PHONE

Billing Address

☒ Same as service address  
NAME  
NAME 2  
ATTN  
ADDRESS LINE 1  
ADDRESS LINE 2  
CITY/STATE/POSTAL CODE  
PHONE

CONTACT NAME	TITLE	CONTACT EMAIL
CONTACT PHONE	PHONE TYPE	BILLING CONTACT
		<input checked="" type="checkbox"/>

Billing

BILL GROUP  
INVOICE BY EMAIL  
TERM  
CREDIT LIMIT

SURCHARGE GROUP  
FUEL SURCHARGE 10%  
AUTO STATUS UPDATE  
EXCLUDE FROM PAST DUE NOTIFICATION  
APPLY FINANCE CHARGES

SALES REP	SITE CLASS	SERVICE REGION	TAX REGION	ORIGIN
House Account		Hearne_SR	ALAMO HEIGHTS CITY	

ACCOUNT CUSTOM PROPERTIES

SITE CUSTOM PROPERTIES

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	Example Account 3			STATUS	Active
NAME 2				DIVISION	DAYTON
ADDRESS LINE 1	223 COUNTY ROAD 6385			SOURCE	
ADDRESS LINE 2				ACCOUNT MANAGER	House Account (Invalid)
CITY/STATE/POSTAL CODE	DAYTON	TX	77535-5	ACCOUNT CLASS	BROKER
PHONE	<div> <div></div> <div>(999) 999-9999</div> </div>			BROKER GROUP	BrokerGroup1
ATTN				COLLECTION AGENT	
BILLING PHONE	<div> <div></div> <div>(999) 999-9999</div> </div>			WEBSITE	
FAX	<div> <div></div> <div>(999) 999-9999</div> </div>			LOGO	<div>Select logo...</div> <div>BROWSE...</div>
BILLING CONTACT 1				OLD ID	DAY-8338
BILLING CONTACT 2					
PARENT ACCOUNT					

SAVE

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.

EDIT ACCOUNT

Account

Settings

NAME

Example Account 6

NAME 2

ADDRESS LINE 1

1234 Navu Way

ADDRESS LINE 2

CITY/STATE/POSTAL CODE

Corpus Christi TX 78411

PHONE

(361) 854-0841

ATTN

BILLING PHONE

(999) 999-9999

FAX

(999) 999-9999

BILLING CONTACT 1

Aliena

BILLING CONTACT 2

SIERRA

PARENT ACCOUNT

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

Credit Hold

INTERNAL COLLECTIONS (Requires no active services for Account)

EXTERNAL COLLECTIONS (Requires no active services for Account)

WEBSITE

LOGO

Select logo... BROWSE...

OLD ID

EDIT ACCOUNT STATUS HISTORY

NEW STATUS

Internal Collections

EFFECTIVE DATE

08/07/2024

COLLECTION GROUP / AGENCY

AGENCY1

NOTE

SAVE

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.

EDIT CONTACT

Details

Customer Portal Access

Tags

Activity History

TITLE

NAME

Aliena

EMAIL

Contact@fakeEmail.com

EMAIL 2

PHONE 1

(999) 999-9999

PHONE 2

(999) 999-9999

PHONE 3

(999) 999-9999

PHONE 4

(999) 999-9999

NOTE

RECEIVE SERVICE NOTIFICATIONS

Yes

SERVICE NOTIFICATION METHOD

Email

REQUEST NOTIFICATION METHOD

None

BILLING CONTACT

None

RECEIVE INVOICE NOTIFICATIONS

Yes

RECEIVE PASTDUE NOTIFICATION

No

MOBILE OPT OUT?

ENABLE PORTAL ACCESS

PORTAL USER

Portal UserId 16746, Last Login Jul 1,2024 10:09 am

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

History7

Attachment

Master Agreement

Term Addendums1

Surcharge Rates2

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		
FIRST NAME	Aliena		
LAST NAME	Somers	DEFAULT HOMEPAGE	Recent Activity
EMAIL	aliena@FakeEmail.com	ONLINE IMAGE	Select Image... <b>BROWSE...</b>
CELL PHONE	(999) 999-9999		
OFFICE PHONE	(999) 999-9999		
TITLE	Admin-NS		
DEPARTMENT	Admin		
<b>MANAGER</b>	<b>Scott Smith</b>		
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 INVITATION**

## 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.

EDIT CANCELLATION REQUEST

Details

Attachments

History

Linked Items

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

EDIT CANCELLATION REQUEST

Details

Attachments

History

Linked Items

+

Add Appointment

Add Note

Add Task

Link Appointment

Link Note

Link Task

Send E-Mail	08/21/2024	Isabel Navarro	send email receipt	—
CANCEL NOTE	08/21/2024	Isabel Navarro	Do not send email	—

SAVE

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.

**CREATE CANCELLATION REQUEST**

Details Attachments History Linked Items

CREATED BY Aliena Somers - Admin-NS (Admin) Sep 9, 2024 07:48 am NOTIFICATION METHOD Select Notification EFFECTIVE DATE

ACCOUNT Wild Mountain (49121) - Active SITE Wild Mountain (49121001) - Inactive CONTACT

ASSIGNED TO Somers - Admin-NS (Admin) STAGE Received TARGET RESOLUTION DATE

CANCELLATION NO Isabel Navarro - Intern  
Jerald Burton  
Karen Blalock - Training Specialist  
Kassy Brister - Admin (Admin)  
Kristi Spicer - Software Engineer  
Kyle Billings - Tech Guy  
Lori Smith - Admin-NS (Admin)  
Matthew Van Doren - Admin - NS (Admin)  
Michael Shannon - Tech Guy (Admin)  
Nikita Raiyani  
Olivia Paige - Software Engineer (Admin)

CONTRACT EXPIRA MONTHLY REVENUE \$ 70.00 SURCHARGE AND FEES

CURRENT CONTRA NEW Yes AUTO RENEW PERIOD (MONTHS) 60

ADDITIONAL NOTI

### 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.

**ACCOUNT REQUEST**

Details Photos Linked Items

TYPE Billing address change

STATUS Billing Error

TOEGEWEZEN Change of service

AAN Container Replacement or repair

NEEM CONTACT Customer Request

OP MET Damage

NOTA Driver Complaint

Missed Pick Up

On Call / Extra pick request

Please call me

Proposal Request

Refund Request

Service Inquiry

OPSLAAN

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.

EDIT ACCOUNT

Account

Settings

Billing

BILL GROUP

QA Billing Cycle

Advance - Monthly

Billed Thru Date Jul 31, 2024

Next Invoice Date Jul 01, 2024

BATCH-25880 (in progress)

INVOICE BY EMAIL

Email With Link

TERM

Due upon receipt

CREDIT LIMIT

500

PAPER BILL FEE

\$ 10.00

BILL BY SITE

☐

AUTO STATUS UPDATE

☒

APPLY FINANCE CHARGES

☒

EXCLUDE FROM PAYMENT PROCESSING FEE

☐

EXCLUDE FROM PAST DUE NOTIFICATION

☐

HIDE WORK ORDER FORMAT RATE

☐

INBOUND ORDER AUTO PRINT

☐

AP

DEFAULT PAYMENT METHOD

ACH

PAYEE NAME

1099

☐

INSTRUCTIONS

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.

TRANSFER SERVICE

FROM

41898002

Active

Navusoft - Demo Site 2

8100 Washington Ave Houston, TX 77007-1062 Harris County

QTY	SERVICE CODE	FREQUENCY	SCHEDULE	RATE	BILLED THRU	NEW RATE
1	96 Gal Trash - Comm	1x per week	W	32.00 per month	8/31/24	32

TO

48910002

Inactive

Test order workorder creation

8100 Washington Ave Houston, TX 77007-1062

END SERVICES ON SITE

41898002

END DATE

10/03/2024

REASON CODE

END-Ownership Char

☐ Create Removal WO

START SERVICES ON SITE

48910002

START DATE

10/07/2024

REASON CODE

New - Temporary

☐ Create Delivery WO

PROCESS TRANSFER

SERVICE CHANGE

Previous:

1

96 Gal Trash - Comm

1x per week

\$ 32.00 per month

N/A

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

EXTERNAL TICKET #

STATUS

Completed

TRANSPORT METHOD

TRUCK

MATERIAL

NOTES

Weights

WEIGHT IN

WEIGHT OUT

NET

START

10/04/24 Fri

12:00 AM

END

--:--

QTY

0

DISPOSAL RATE

FEE 1

FEE 2

TOTAL COST

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

SERVICE NOTES

FL Delivery

☒

ROUTE

DATE

10/09/24 Wednesda

WORK ORDER NOTES

Map

Google

Keyboard shortcuts

Map data ©2024 Google

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](#)

The screenshot shows the 'EDIT REFUND REQUEST' popup window. The 'History' tab is active, displaying a table with the following data:

ID	ASSIGNED TO	DEPARTMENT	STATUS	AMOUNT	CREATED BY	CREATED ON	NOTE
1002	Susan Silvestri		Submitted for Approval	6.87	Paul Smith - QA Expert (Admin)	10/9/24 9:15 am	
1005			Returned to Submitter		Paul Smith - QA Expert (Admin)	10/9/24 9:18 am	for testing purposes

The 'DETAILS' tab is also visible, showing the refund request for 'Polly's Pies Restaurant & Bakery' with a frequency of '1x per week' and a rate of '\$ 100.00 per month'.

## 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.

The screenshot shows the 'EDIT SERVICE' screen for 'Polly Pie 2 (Active) 17198 Norwalk Blvd'. The 'SERVICE DAYS' section is highlighted, showing the selection of Tuesday as the current schedule. The 'SERVICE DAYS' section includes the following options:

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

The 'Current Schedule' is indicated as 'T' (Tuesday). The 'SERVICE DAYS' section also includes a 'Clone Service' link and a 'DISPLAY ALL LINES OF BUSINESS' checkbox.

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

The screenshot shows a software interface for a site management system. On the left, a dropdown menu is open, listing various actions: Proposal and Contract, Site, Clone Site and Services, Account Request, Appointment, Attachment, Contact, Lead, Manual Charge, Note, Refund Request, Safety Profile, Task, Default Rates, Send Email, Export Vendor Invoice, and Split Site into New Account. The 'Site' option is selected. In the background, a calendar view is visible, showing dates from Sep 29 to Oct 15. A red arrow points to the 'Add Active Service' option, which is hidden. A red text box explains: '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.

PHOTOS, ATTACHMENTS, PURCHASE ORDERS AND WASTE PROFILES

Photos 1

Attachments 1

Blanket Purchase Orders

Waste Profile

+

ADD WASTE PROFILE

SITE

NAME

START DATE

END DATE

NOTE

ADD ATTACHMENT

Select file...

BROWSE...

DESCRIPTION

UPLOAD

ADD ATTACHMENT

SAVE

STATE DATE

END DATE

Oct 24

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

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

%78

✓ 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

1

EQUIPMENT

2 Yard FL

SERVICE CODE

2 Yard Trash Service

FREQUENCY

1x per week

PER UNIT

0.0000

SERVICE FEES

0.00

1

EQUIPMENT OWNERSHIP

Company

2

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

+

DEFAULT DESTINATION

Map

Port Of C

Christi Bulk Mater

iver Rd

M (B Week)

Up

Be

estern 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

DIVISION

HOUSTON

ACCOUNT MGR

House Account - House Account (Sales)

CLASS

ROLL OFF-TEMP

BILL GROUP

HOU-COMMERCIAL ARREARS

ARREARS - MONTHLY

Billed Thru Date None

100

TERMS

Net 20

INVOICE DELIVERY

Email with Link

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

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.

CREATE ACCOUNT

ACCOUNTS > ADD ACCOUNT

STATUS: Prospect

SOURCE: [Dropdown] ACCOUNT DIVISION: [Dropdown] SITE DIVISION: [Dropdown] ACCOUNT CLASS: [Dropdown]

Service Address

NAME: [Text] NAME 2: [Text] ADDRESS LINE 1: [Text] ADDRESS LINE 2: [Text] CITY/STATE/POSTAL CODE: [Text] [Dropdown] [Text] PHONE: [Text] WEBSITE: [Text] POB: [Text] EPA: [Text] SIGNATURE REQUIRED: ☐

Billing Address

☒ Same as service address

NAME: [Text] NAME 2: [Text] ATTN: [Text] ADDRESS LINE 1: [Text] ADDRESS LINE 2: [Text] CITY/STATE/POSTAL CODE: [Text] [Dropdown] [Text] PHONE: [Text]

CONTACT NAME: [Text] TITLE: [Text] CONTACT EMAIL: [Text] CONTACT PHONE: [Text] PHONE TYPE: [Text] BILLING CONTACT: ☒

SALES REP: [Dropdown] SITE CLASS: [Dropdown] SERVICE REGION: [Dropdown] TAX REGION: [Dropdown] SURCHARGE GROUP: [Dropdown] ORIGIN: [Dropdown]

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.

EDIT SERVICE RECORD

Site # 49232001

Caribou Coffee

112 Chieftain St  
Osceola, WI 54020

CREATED BY  
Aliena Somers - Admin-NS (Admin) on  
11/19/24 5:14 pm

ORDER REASON  
[Dropdown]

WORK ORDER: 8777052 QTY: 1 SERVICE CODE: 4 Yard Trash Service (39F3) EQUIPMENT: 4YD WORK TYPE: FL\_SERVICE

ORDER NOTES  
[Text]

PO NUMBER: [Text] EXTERNAL ID: [Text]

SCHEDULED DATE: 12/26/24 Thursday ROUTE: LA 101 SEQUENCE: 0

WORK STATUS: Scheduled EXCEPTION REASON: [Text]

Charges Payments Completion Lab Tests Attachments Labels Photos

☐ Charges must match Equipment ☐ Charges must match Material WO MINIMUM: [Text]

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

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

50

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

Active

DIVISION

QAWASTE

ACCOUNT MGR

Aliena Somers - Admin-NS (Admin)

CLASS

COMMERCIAL

BILL GROUP

QA Billing Cycle

ADVANCE - MONTHLY

Billed Thru Date Nov 30, 2024

TERMS

Net 20

INVOICE DELIVERY

Printed

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

Equipment Owner:

Adjustment-Commercial: \$ 0.00 each

Effective: 12/27/2024

Adjustment-Commercial: \$ 35.00 each

Reason: CHG-Temp Decrease In Svc

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						
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:

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

PHOTOS, ATTACHMENTS, PURCHASE ORDERS AND WASTE PROFILES

Photos

Attachments

Blanket Purchase Orders

Waste Profile

+

1

ID	SOURCE	PHOTO DESCRIPTION	CREATED BY	CREATED ON	
11748	1579		Aliena Somers - Admin-NS (...)	12/12/2024 10:25 am	View
11747			Aliena Somers - Admin-NS (...)	12/11/2024 4:13 pm	View

2

View

View

103.92 per month

FRI

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

## Orders, Quotes and Contracts (Accounts) - Logic Updated to Multi-Site Proposals (17581)

The logic for proposals with multiple sites has been updated. Proposals and contracts that include more than one site will now be visible on all associated sites, not just the primary site.

48969 Staples Center

48969002 1111 Site 2 - Clone Example

1111 S Figueroa St  
Los Angeles, CA 90015-1306  
US  
(B) +1 310-555-8774

Active

DIVISION

ACCOUNT MGR

CLASS

BILL GROUP

QAWASTE

House Account - House Account (Sales)

COMMERCIAL

VENDORS

2 of 3

1234 Industrial Drive  
Los Angeles, CA 90015

Active

DIVISION

SERVICE REGION

SALES REP

SOURCE

GENERATOR

TAX REGION

TAX EXEMPT

VEEN REPORTABLE

QA Service Region 2

House Account - House Account (Sales)

Referral

Not Applicable

<Not Set>

No

No

CURRENT	1-30	31-60	61-90	91-120	120+	TOTAL
-67.99	0.00	0.00	0.00	0.00	0.00	-67.99

Auto Pay Not Enabled

HIGHLIGHTS

PENDING

9340	Credit Request	Paul Gonzalez - ...	10/31/2024
4107	Proposal	House Account - ...	12/09/2024
4114	Proposal	House Account - ...	12/16/2024

ACTIVE SERVICES (5)

Standard

TOTAL RECURRING \$ 362.26

CALENDAR

December, 2024

EVENTS

Appointment, AR, Cancellation, Complaint, E...

LEGEND

ORDERS, QUOTES, AND CONTRACTS (2)

ID	START DATE	EST. CLOSE DATE	FORMAT	STATUS	MONTHLY REVENUE	SALES REP	TITLE	AUTH/APPROVAL
4107	12/09/24	12/09/24 Medium	Proposal A-New Business-Ac...	Open	\$ 1,166.00	House Account - Hou... - DO NOT USE (Admin)		
4114	12/16/24	12/16/24 Medium	Proposal A-New Service	Open	\$ 418.20	House Account - Hou... - DO NOT USE (Admin)		

Pathway: Accounts > Orders, Quotes, and Contracts

## Service Record (Accounts) - Support for Non-Integrated Credit Card Terminal (17615)

A new "Enabled Non-Integrated Credit Card Terminal" field has been added to the **Credit Card/ACH** tab in the **Division Setup** screen. When this field is enabled, the "Credit Card - Non-Integrated Terminal" option becomes available in the **Type** dropdown on a service record's **Add Payment** screen. If the field is not enabled, this option remains hidden.

EDIT SERVICE RECORD

Site # 49232001

Caribou Coffee

112 Chieftain St

Osceola, WI 54020

WORK ORDER

8938669

QTY

1

SERVICE CODE

4 Yard Trash Service

(157746)

EQUIPMENT

4YD

WORK TYPE

FL\_EXTRAPU

ORDER TYPE

On Call

ORDER NOTES

CREATED BY

Aliena Somers - Admin-NS (Admin) on

12/23/24 1:28 pm

PO NUMBER

1234

EXTERNAL ID

ORDER REASON

Charges

Payments

+

DESCRIPTION

ADD PAYMENT

TYPE

Credit Card - Non-Integrated Terminal

PAYMENT AMOUNT

Cash

Check

Credit Card

Credit Card - Non-Integrated Terminal

Debit Card

Money Order

REFERENCE NUMBER

NOTE

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.

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'.

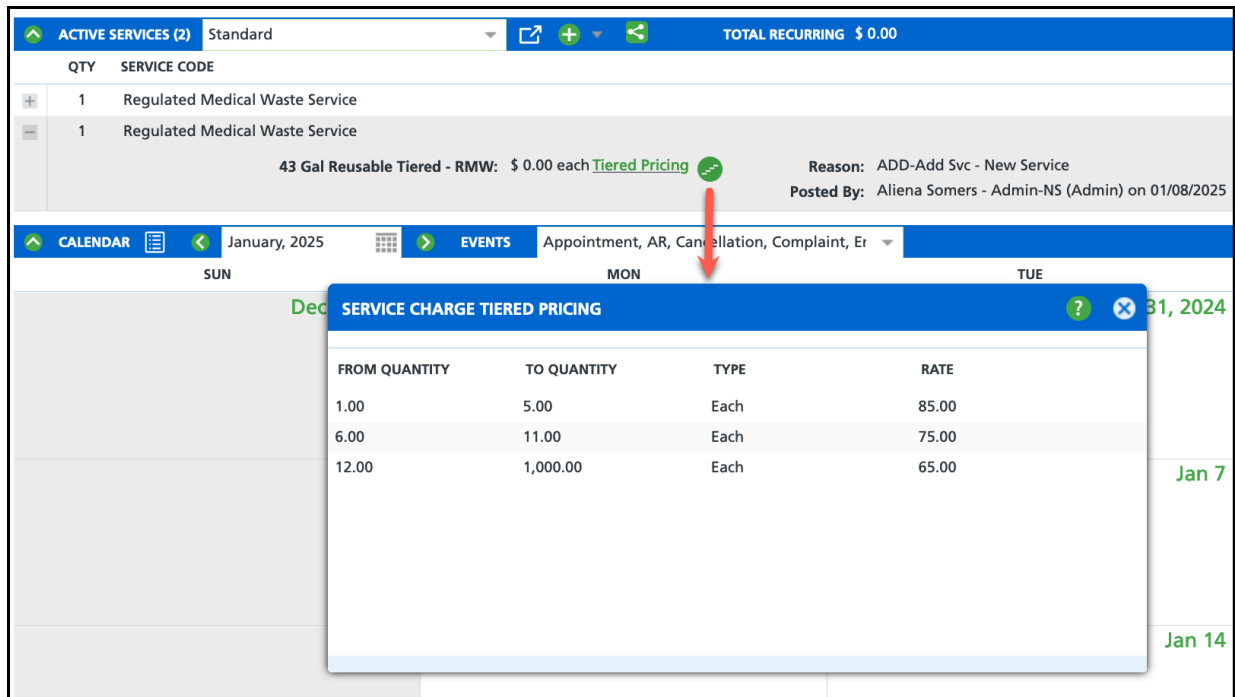
49232 Caribou Coffee				49232001 Caribou Coffee			
112 Chieftain St Osceola, WI 54020 US				112 Chieftain St Osceola, WI 54020 Polk County US			
Active				1 of 2			
DIVISION QAWASTE							
ACCOUNT MGR Aliena Somers - Admin-NS (Admin)							
CLASS COMMERCIAL							
BILL GROUP QA Doc 4 Week Anniversary							
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 m			
				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.



**ACTIVE SERVICES (2)** Standard TOTAL RECURRING \$ 0.00

QTY	SERVICE CODE
1	Regulated Medical Waste Service
1	Regulated Medical Waste Service

43 Gal Reusable Tiered - RMW: \$ 0.00 each **Tiered Pricing** Reason: ADD-Add Svc - New Service  
Posted By: Aliena Somers - Admin-NS (Admin) on 01/08/2025

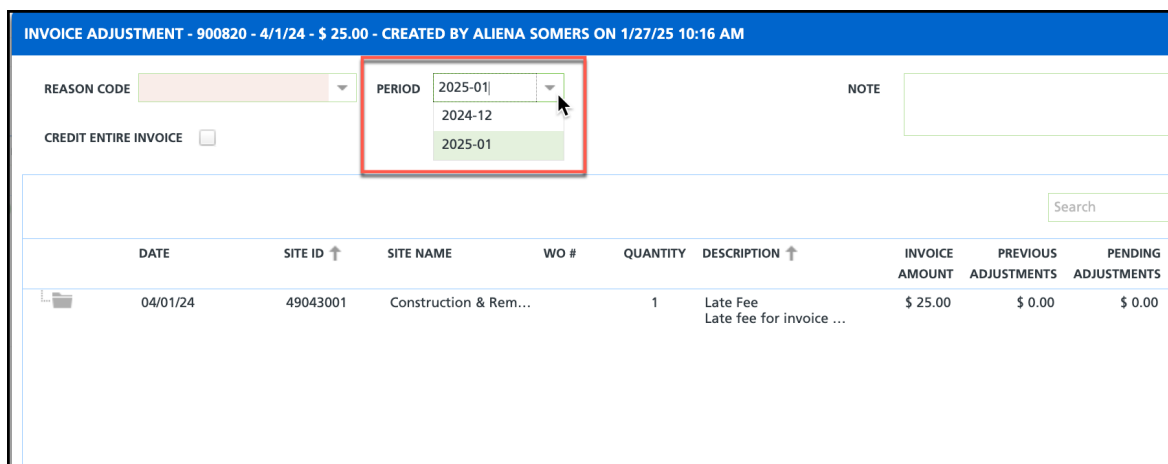
**SERVICE CHARGE TIERED PRICING**

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.



**INVOICE ADJUSTMENT - 900820 - 4/1/24 - \$ 25.00 - CREATED BY ALIENA SOMERS ON 1/27/25 10:16 AM**

REASON CODE PERIOD 2025-01 | 2024-12 | 2025-01 NOTE

CREDIT ENTIRE INVOICE ☐

Search

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 <input checked="" type="checkbox"/>		VIEW	Search		
12/01/2024	01/27/2025	CORPUS, DAYTON, HEARNE	All			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:

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

CREATE ON CALL ORDER									
<b>Site #</b> 49232001 <b>Caribou Cafe</b> 112 Chieftain St Osceola, WI 54020 <b>EPA:</b> EPA Value <b>CONTACT</b> Aliena +1 555-555-7026 <b>BUSINESS HOURS</b> <b>Weekdays</b> 8:00 AM to 7:00 PM <b>ACCESS</b> Always use East gate <b>SITE NOTE</b> Collection Times: Before 8 AM to avoid business hours.		<b>SCHEDULE DATE</b> 01/30/25 Thursday	<b>SERVICE CODE</b> 4 Yard Trash Service	<b>ORDER TYPE</b> [Dropdown]	<b>QUANTITY</b> 1				
<b>REQUESTED BY</b> [Text Field]		<b>CONTACT</b> [Dropdown]		<b>REASON CODE</b> [Dropdown]					
<b>ORDER NOTES</b> [Text Area]						<b>PREPAYMENT</b>			
<b>PO NUMBER</b> [Text Field]		<b>BLANKET PO</b> [Dropdown]		<b>EXTERNAL ID</b> [Text Field]					
<b>ROUTE</b> [Dropdown]									
CHARGES									
<input type="checkbox"/> Charges must match Equipment <input type="checkbox"/> Charges must match Material									
GROSS QTY	NO CHARGE QTY	CHARGE QTY	UOM	CHARGE CODE	PER UNIT	VENDOR RATE	MINIMUM TYPE	MINIMUM	TOTAL
<div>CREATE</div>									

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

Site # 49232001  
Caribou Cafe  
112 Chieftain St  
Osceola, WI 54020

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

ORDER REASON

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

PO NUMBER

EXTERNAL ID

SCHEDULED DATE  
02/04/25 Tuesday

ROUTE

SEQUENCE  
0

DESTINATION / ORIGIN

WORK STATUS  
Scheduled

EXCEPTION REASON

POSTING STATUS  
Pending

Charges1

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)

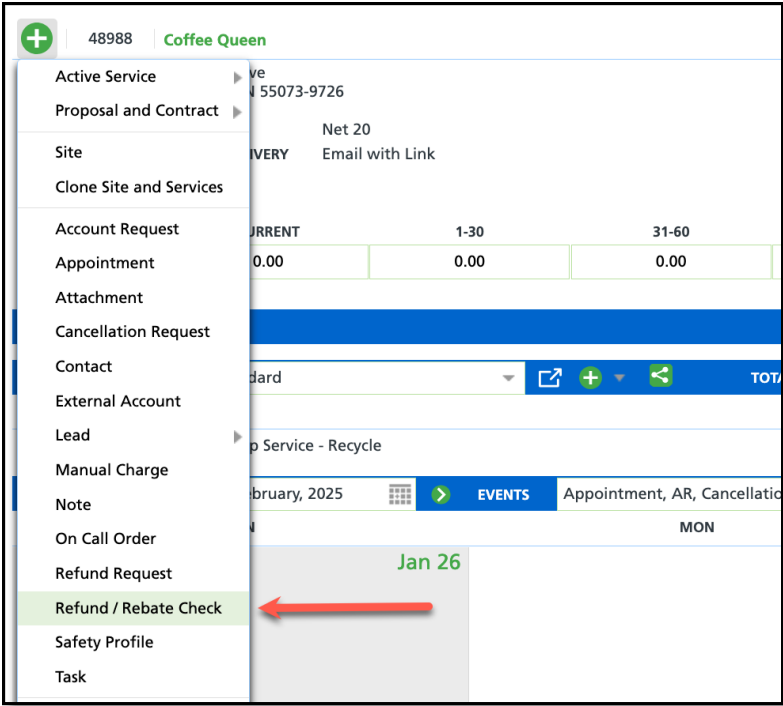
Enhancements have been made to Customer Service, AR History, Permissions, and other areas to expand rebate check prepayment, providing better support for refund scenarios.

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 screenshot shows a software interface with a sidebar menu on the left and a main window. The sidebar menu includes options like 'Active Service', 'Proposal and Contract', 'Site', 'Clone Site and Services', 'Account Request', 'Appointment', 'Attachment', 'Cancellation Request', 'Contact', 'External Account', 'Lead', 'Manual Charge', 'Note', 'On Call Order', 'Refund Request', 'Refund / Rebate Check' (highlighted with a red arrow), 'Safety Profile', 'Task', 'Default Rates', and 'Next Invoice Message'. The main window displays the 'ADD REFUND / REBATE CHECK' form. The form has a blue header bar with the title and a green question mark icon. Below the header, there are fields for 'ACCOUNT' (48988, 22222 1st Ave, Scandia, MN 55073-9726), 'REASON CODE' (a dropdown menu with 'Select Reason' selected), 'CHECK #' (a text input field), 'AMOUNT' (a text input field), and 'DATE' (a date picker showing 'Feb 2'). At the bottom of the form is a green 'POST' button. The background of the main window shows a calendar view with dates 'Feb 2' and 'Feb 3'.

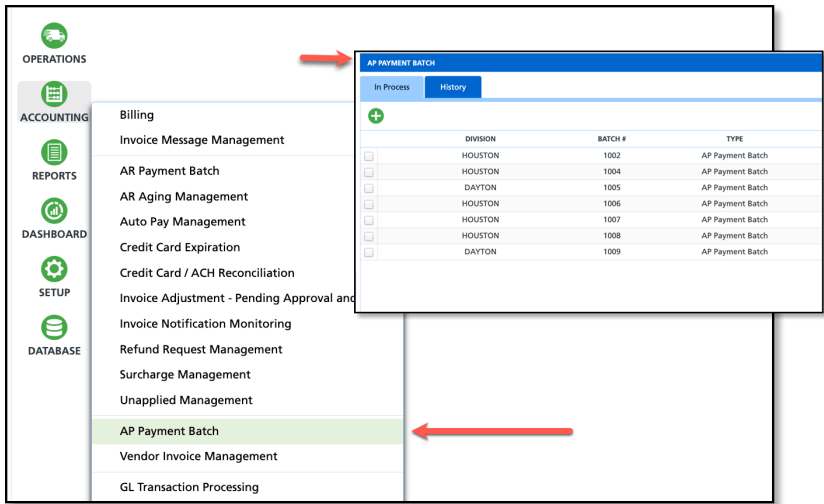
The Add Prepayment window has been updated to '**Add Refund / Rebate Check**' and the following other enhancements have been applied to the screen:

- 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	
0.00		0.00		0.00	
61-90 DAYS		91-120 DAYS			
0.00		0.00		0.00	
<div><input checked="" type="checkbox"/> Limit to open items</div> <div>STATEMENT</div> <div>INVOICE</div> <div>AUTO APPLY</div> <div>BALANCE WRITE OFF</div> <div>WALLET (0)</div>					
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
	<b>Tax</b>					\$ 16.06
	<b>Site Total</b>					\$ 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
<div> <div>+</div> <div>DIVISION</div> <div>CORPUS, DAYTON, HEARNE, HILLSBORO, H</div> </div>		<div> <div>TYPE</div> <div>All</div> </div>		<div> <div>STATUS</div> <div>All</div> </div>		<div> <div>Search</div> <div></div> <div></div> <div></div> <div></div> </div>					
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. At the top, there are filters for 'GRID VIEW' (Standard), 'CHANGE TYPE' (%), 'AMOUNT' (0.00), and 'EFFECTIVE DATE' (10/01/2023). A search bar is also present. Below these filters is a table with columns: SITE ID, NAME, CITY, SERVICE CODE, CURRENT RATE, NEW RATE, VARIANCE, and CURRENT WO MINIMUM. A modal window titled 'VOID RATE UPDATE BATCH' is open in the center, featuring a 'NOTES' text area and 'VOID' and 'CANCEL' buttons. At the bottom of the main interface, there are buttons for 'EXPORT', 'IMPORT', 'POST', 'VOID', and 'CLOSE', along with a status indicator '53 records / 0 selected / 53 visible'.

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. At the top, there are filters for 'DIVISION' (CORPUS, DAYTON, HEARNE, HILLSBORO, H), 'TYPE' (All), and 'STATUS' (All). Below these filters is a table with columns: ID, DIVISION, SERVICE REGION, LINE OF BUSINESS, TYPE, and CREATED DATE/CREATED USER. A modal window titled 'SITE SERVICE RATE UPDATE BATCH: 1013' is open in the center, showing a 'GRID VIEW' dropdown menu with options: 'ook of Business', 'Standard', 'Extended', and 'Book of Business'. The 'Book of Business' option is selected, and a table of records is displayed below it. The table has columns: ID, SITE DIVISION, SITE NAME, SITE NAME 2, SERVICE REGION, and SALES REP. The records are listed with checkboxes in the first column.

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)

EFFECTIVE DATE

MONTHS AT CURRENT RATE

LOAD

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

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

APPLY

NET VARIANCE

\$0.00

EFFECTIVE DATE

02/27/2025

SEARCH

SITE ID	SITE NAME	CITY	SERVICE ID	CHARGE CODE	CURRENT RATE	NO CHARGE QUANTITY	NEW RATE	VARIANCE
49046001	Boba Junkie Fountain Valley	Fountain Valley	38209	Adjustment-Roll Off	\$ 35.00	0		
49096001	Food4Less	Los Angeles	38382	Adjustment-Commercial	\$ 35.00	0		
49096002	Eleven Bakery	Monterey Park	38382	Adjustment-Commercial	\$ 35.00	0		
49110001	Amy's Hallmark Shop	Arcadia	38380	Adjustment-Commercial	\$ 35.00	0		

EXPORT

IMPORT

4 records / 4 selected / 4 visible

POST

VOID

CLOSE

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

START

07/12/24 Fri

07 : 56 : 00 . 000

QTY

10000

ton

WEIGHT OUT

ton

END

NET

DISPOSAL RATE

20.0000

FEE 1 - FLAT

50.00

FEE 2 - FLAT

60.00

TOTAL COST

200000.00

Ticket Image

+

Include Ticket Image With Invoice and make available in customer portal

SAVE

## 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.

**DISPATCH**

FROM: 08/02/24 TO: 08/02/24 DIVISION: QAWASTE LINE OF BUSINESS: Residential

Transport Select Route Sheet

ROUTE TRUCK DRIVER DESTINATION

QAWASTE > Residential > Friday Aug 2, 2024

RES101 LA-1 Test2 Dispatcher User - Dispatch (Operations)

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

TYPE: Completed Work Order, Downtime

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

HOURS: 9.5 DOWNTIME: 0.4 (1) DISTANCE: 152 mi FUEL: 50 G PRE-TRIP: Fail POST-TRIP: Incomplete Aliena Somers October 11, 2024 12:54 pm

CHECK IN PREVIEW ROUTE SEQUENCE USING COMPLETION ORDER

TIME	SEQ	LOCATION	REFERENCE #	QTY	NOTE
10:58 am			Log In	10500.0	
10:58 am			FAIL		
11:29 am	14	1234 Loren Ln 1234 Loren Ln Rosemead, CA 91770-3986	7999456	1	Service Completed
11:33 am	16	2345 Loren Ln 2345 Loren Ln Rosemead, CA 91770-3986	7999453	1	Service Completed
11:33 am	11	3456 Loren Ln 3456 Loren Ln Rosemead, CA 91770-3969	7999442	1	Service Completed
11:34 am	8	Residential Customer 6 4567 Falling Leaf Ave Rosemead, CA 91770-3573	7999450	1	Service Completed
11:35 am	5	Residential Customer 5 5678 Falling Leaf Ave Rosemead, CA 91770-3563	7999449	1	Service Completed
11:36 am	7	Residential Customer 7 6789 Eckhart Ave Rosemead, CA 91770-3556	7999451	1	Service Completed
11:41 am	15	7890 Loren Ln 7890 Loren Ln Rosemead, CA 91770-3986	7999452	1	Service Completed
12:03 pm	12	8901 Loren Ln 8901 Loren Ln Rosemead, CA 91770-3969	7999454	1	Service Completed
12:03 pm	10	9012 Loren Ln 9012 Loren Ln Rosemead, CA 91770-3969	7999441	1	Service Completed
12:04 pm	13	0123 Loren Ln 0123 Loren Ln Rosemead, CA 91770-3969	7999455	1	Service Completed
1:20 pm			Log Out	10652.0	
1:21 pm			Flat Tire		

Map view showing route path and locations.

## 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.

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

TYPE: Completed Work Order, Downtime

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

HOURS: 9.5 DOWNTIME: 0.4 (1) DISTANCE: 152 mi FUEL: 50 G PRE-TRIP: Fail POST-TRIP: Incomplete Aliena Somers October 11, 2024 12:54 pm

CHECK IN PREVIEW ROUTE SEQUENCE USING COMPLETION ORDER

Set Driver Log In / Out  
Set Truck Odometer  
Add Disposal  
Add Downtime  
Add Fuel

TIME	SEQ	LOCATION	REFERENCE #	QTY	NOTE
10:58 am			Log In	10500.0	
10:58 am			FAIL		
11:29 am	14	1234 Loren Ln 1234 Loren Ln Rosemead, CA 91770-3986	7999456	1	Service Completed
11:33 am	16	2345 Loren Ln 2345 Loren Ln Rosemead, CA 91770-3986	7999453	1	Service Completed
11:33 am	11	3456 Loren Ln 3456 Loren Ln Rosemead, CA 91770-3969	7999442	1	Service Completed

Map view showing route path and locations.

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

9.5

DOWNTIME

0.4 (1)

DISTANCE

152 mi

FUEL

50 G

PRE-TRIP

Fail

POST-TRIP

Incomplete

Aliena Somer

October 11, 2024

TIME ↑

SEQ

LOCATION

REFERENCE #

QTY

NOTE

🕒

10:58 am

Log In

10500.0

🕒

10:58 am

FAIL

⌚

11:29 am

14

8039 Loren Ln

7999456

1

17 mins

8039 Loren Ln

Service Completed

Rosemead, CA 91770-3986

⌚

11:33 am

16

8027 Loren Ln

7999453

1

27 secs

8027 Loren Ln

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

16

COMPLETED

13

PENDING

0

DO NOT SERVICED

3

EXCEPTIONS

0

HOURS

9.5

DOWNTIME

0.4(1)

DISTANCE

152 mi

FUEL

50 G

PRE-TRIP

Fail

POST-TRIP

Incomplete

Aliena Somer

October 11, 2024

TIME

↑

SEQ

LOCATION

REFERENCE #

QTY

NOTE

🕒

10:58 am

Log In

10500.0

🕒

10:58 am

FAIL

🕒

11:29 am

14

8039 Loren Ln  
8039 Loren Ln  
Rosemead, CA 91770-3986

7999456

1

17 mins

Service Completed

🕒

11:33 am

16

8027 Loren Ln  
8027 Loren Ln

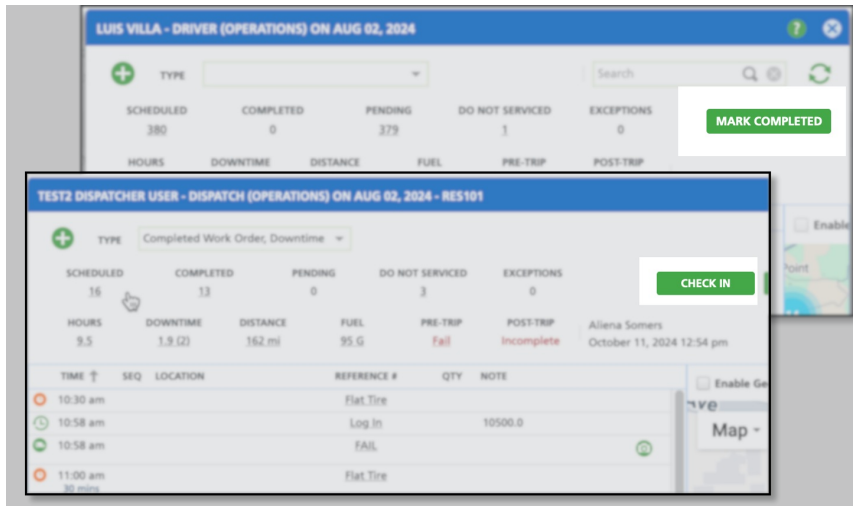
7999453

1

27 secs

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>
<b>QAWASTE &gt; Residential &gt; Friday Aug 2, 2024</b>			
<input type="checkbox"/>		<u>RES101</u>	<u>LA-1</u>

### Route Data Entry

**DISPATCH**

FROM: 08/02/24 TO: 08/02/24 DIVISION: Texas, DAYTON, HOUSTON, QAWASTE, CORPUS, HILLSBORO

Route Data Entry

ROUTE DRIVER PAYROLL LOG IN PRE TRIP FIRST LUNCH  
CLOCK IN SERVICE TIME START

CORPUS > Roll Off > Friday Aug 2, 2024

ALVARO (hiiiwewe) QAUSTR3 TEST3 (Admin) [NOT AVAI... ?

DAYTON > Roll Off > Friday Aug 2, 2024

DAY 101 ?

DAY 301 ?

DAY 302 ?

HOUSTON > YARD: Pearland > Roll Off > Friday Aug 2, 2024

HOU 301 ?

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.

OPERATIONS > DISPATCH

LINE OF BUSINESS: Residential, Commercial

LOAD

Search

NAME	PAYROLL CLOCK IN	LOG IN	LUNCH START	LUNCH END	LOG OUT	PAYROLL CLOCK OUT
0 of 1 completed (0 checked in)						
	2:13 am	2:20 am			?	
0 of 1 completed (0 checked in)						
Test2 Dispatcher User - Dispatch (Operations)						
	5:00 am	5:30 am	10:00 am	10:30 am	3:00 pm	3:30 pm

## 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)								
			0			?	0 (0)	0
		771 ( 0 km)	0			?	0 (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.'

**DISPATCH**

FROM: 11/13/24 TO: 11/13/24 DIVISION: QAWASTE, HOUSTON

ROUTE PRIMARY LINE OF BUSINESS: Roll Off, Commercial, Residential

Route Data Entry

ROUTE DRIVER PAYROLL LOG IN PRE TRIP FIRST LUNCH LUNCH END LAST TRUCK FUEL POST TRIP LOG OUT PAYROLL DOWNTIME LABOR  
CLOCK IN SERVICE TIME START SERVICE TIME (DISTA...

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

Satellite

RAY SIMPSON (43797001)

PEARLAND, TX 77581-5665

1 6 Yard Trash Service 2x per week 6 Yard FL \$212.00

Avg Quantity: 0

Next Week #: 48

DOW: Th     Route: HOU 204

Material:MSW

Week 5 (B)

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.

EDIT DISPOSAL / SHIPMENT

Route Disposal: LA 101

FACILITY

LA TRANSFER STATION

EXTERNAL TICKET #

123

STATUS

Completed

TRANSPORT METHOD

Truck

TRUCK

MATERIAL

NOTES

Weights

WEIGHT IN

WEIGHT OUT

NET

Ticket Image

+

Include Ticket Im

ASSOCIATE DISPOSAL TO ROUTE OR WORK ORDER

LA

TYPE	VEHICLE ↑	SITE / ACCOUNT ↑	SERVICE INFO	ADDITIONAL INFO
Route: LA 101 - Mon 12/16/24 Scheduled	LA-1	Multiple		Driver: Test2 Dispatcher User LOB: Commercial
Route: LA 102 - Tue 12/17/24 Scheduled	DTRUCK	Multiple		Driver: Paul Jones LOB: Commercial
Route: LA 103 - Tue 12/17/24 Scheduled		Multiple		LOB: Residential

SAVE (F2)

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.

CORPUS > Commercial > Tuesday Dec 17, 2024

<input checked="" type="checkbox"/>		COR 202 (new default)	
<input checked="" type="checkbox"/>		COR 203	
<input checked="" type="checkbox"/>		COR 203R	
<input checked="" type="checkbox"/>		COR 204	
<input checked="" type="checkbox"/>		COR 205	
<input type="checkbox"/>		COR DUMPSTER D	
CORPUS > YARD: Home Yard			
<input type="checkbox"/>		COR 201 (Test)	
CORPUS > Roll Off > Tuesday Dec 17, 2024			

7 rows selected

Display on Map

Send Route Notification

Change Status

Optimize Routes

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		

## 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  
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

TICKET NUMBER 41584  
WORK ORDER 9309046  
QTY 1  
SERVICE CODE Scale Inbound Services  
WORK TYPE SCALE\_POST  
ORDER TYPE Inbound / Receiving

ORDER NOTES

TRUCK SCALETRK3  
RECEIVING FACILITY HOMEBASE  
TRANSPORTER  
WORK STATUS In Progress

VEHICLE INFO  
MATERIAL MSW  
TRANSPORT METHOD Truck  
EXCEPTION REASON

PO NUMBER  
EXTERNAL ID  
BILL OF LADING  
POSTING STATUS Pending

Weights  
GROSS / IN  
TARE / OUT 10 lbs  
NET lbs  
START 03/05/25 Wed 10 : 55 : 00 . 000 A  
END  
Adjust

CHARGES \$ 50.00  
**SURCHARGES \$ 9.66**  
TAXES \$ 3.38  
TOTAL \$ 63.04

Charges \$ 50.00  
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	each	Tires	\$ 30.00		None		\$ 0.00	
0			0	ton	Construction and Demolition	\$ 56.00		None		\$ 0.00	
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										
<b>Site #</b>	<b>WORK ORDER</b>	<b>QTY</b>	<b>SERVICE CODE</b>	<b>EQUIPMENT</b>	<b>WORK TYPE</b>	<b>ORDER TYPE</b>				
46815001 MOORE PLAZA 5425 S Padre Island Dr Corpus Christi, TX 78411	8703760	1	6 Yard Trash Service (137323)	6YD	FL_SERVICE	Scheduled Service				
<b>ORDER NOTES</b>										
<b>CREATED BY</b> David Navarro - Admin-NS (Admin) on 11/8/24 3:55 am										
<b>ORDER REASON</b>										
<b>PO NUMBER</b>		<b>EXTERNAL ID</b>								
<b>SCHEDULED DATE</b>			<b>ROUTE</b>			<b>SEQUENCE</b>		<b>DESTINATION / ORIGIN</b>		
12/23/24 Monday			COR 203 - Marco Hurtado			0				
<b>WORK STATUS</b>				<b>EXCEPTION REASON</b>			<b>POSTING STATUS</b>			
Scheduled							Pending			
<div>Charges</div> <div>Payments</div> <div>Completion</div> <div>Lab Tests</div> <div>Attachments</div> <div>Labels</div> <div>Photos</div>										
<input type="checkbox"/> Charges must match Equipment <input type="checkbox"/> Charges must match Material		WO MINIMUM				CALCULATE LAB QTY AND AMOUNTS				
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 <u>Kingwood - Freebirds</u> 3112 W Lake Houston Pkwy, Houston	Wed 1/8/25	11/24/24 3:55am	8794323
<input checked="" type="checkbox"/>	DAY 202		5 rows selected	46034001 * <u>Veratex Gas Group LLC</u> 18574 Van Rd, Houston	Wed 1/8/25	11/24/24 3:55am	8794327
<input checked="" type="checkbox"/>	DAY 202		Display on Map	46620001 <u>SHIELD WASTE CONSULTANTS</u> 8411 Humble Westfield Road, Humble	Wed 1/8/25	11/24/24 3:55am	8794329
<input checked="" type="checkbox"/>	DAY 202		Change Route	47760001 <u>Lee Insurance Agency</u> 8727 FM 1960, Humble	Wed 1/8/25	11/24/24 3:55am	8794333
<input checked="" type="checkbox"/>	DAY 202		Change Scheduled Date	48202001 <u>Amazing Living HCS</u> 304 Wilson Rd, Humble	Wed 1/8/25	11/24/24 3:55am	8794335
<input checked="" type="checkbox"/>	DAY 202		Change Status	48614001 <u>Honeybee Ham</u> 9638 Farm to Market 1960 Bypass Rd W, Humble	Wed 1/8/25	11/24/24 3:55am	8794337
<input checked="" type="checkbox"/>	DAY 202		Change Posting Status				

### Select All / Deselect All Checkbox Indicator

SERVICES LIST						
Dispatch		Select Print Format		PRINT COMPLETED		
ROUTE	SEQ	ORDER NOTE	LOCATION	SCHEDULED DATE	CREATED ON	WO#
DAY 202						
DAY 202						
DAY 202						
DAY 202						
DAY 202						

SERVICES LIST						
Dispatch		Select Print Format		PRINT COMPLETED		
ROUTE	SEQ	ORDER NOTE	LOCATION	SCHEDULED DATE	CREATED ON	WO#
DAY 202			44560001 Kingwood - Freebirds 3112 W Lake Houston Pkwy, Houston	Wed 1/8/25	11/24/24 3:55am	
DAY 202			46034001 * Veratex Gas Group LLC 18574 Van Rd, Houston	Wed 1/8/25	11/24/24 3:55am	
DAY 202			46620001 SHIELD WASTE CONSULTANTS 8411 Humble Westfield Road, Humble	Wed 1/8/25	11/24/24 3:55am	
DAY 202			47760001 Lee Insurance Agency 8727 FM 1960, Humble	Wed 1/8/25	11/24/24 3:55am	
DAY 202			48202001 Amazing Living HCS 304 Wilson Rd, Humble	Wed 1/8/25	11/24/24 3:55am	

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

SERVICES LIST						
Dispatch		Select Print Format		PRINT COMPLETED		
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 Joey 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

SERVICES LIST										
Dispatch		Select Print Format		PRINT COMPLETED			Search			
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

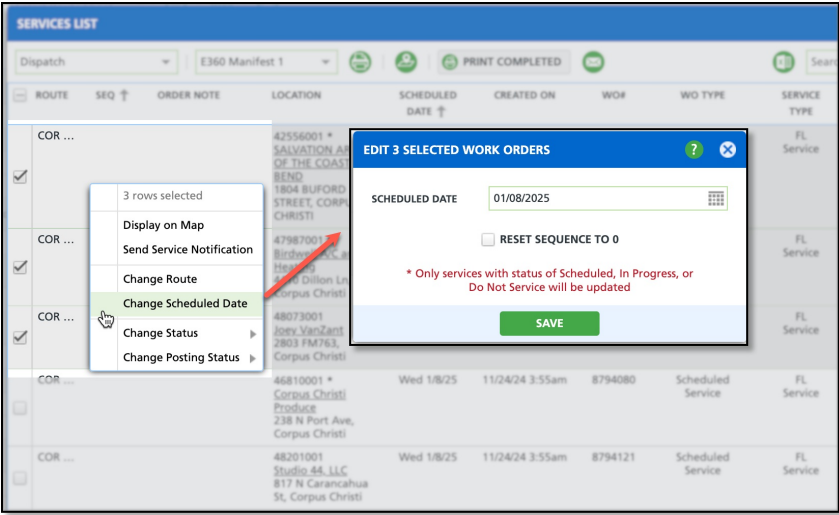
The following updates have been made to the toolbar:

- 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.

DISPOSAL ACTIVITY

OPERATIONS > DISPOSAL ACTIVITY

Activity

Targets

Ticket Search

DIVISION

SUMMARY BY

GROUP BY

FROM

TO

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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.

The screenshot shows the 'FACILITY SETUP' screen with a table of facilities. A modal window titled 'UPDATE FACILITY' is open, showing the 'Inbound / Outbound' tab. The 'SEARCH DEFAULT FOR CREATE NEW' dropdown is set to 'Truck'.

ID	NAME	ABBREV	DIVISION	TYPE	OWNERSHIP
1001	CITY OF ALICE LF	ALICE	CORPUS	Landfill	Third Party
1034	COAST PLAINS LF	CPLF	HOUSTON	Landfill	Internal
1038	TAYLOR				
1041	Republic				
1042	Rumpke				
1043	Stericycle				
1044	QA waste				
1045	QA Waste				
1047	LALAND				
1048	LA TRASH				

## Inbound/Outbound - Search Type

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

The screenshot shows the 'INBOUND / OUTBOUND' screen. A modal window titled 'CREATE NEW TRANSACTION' is open, showing the 'SEARCH TYPE' dropdown set to 'Truck'.

ORDER #	DATE	VEHICLE	ACCOUNT / SITE
41156			
41176			
41485			
41497			
41498			
41499			
41531			

**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, H-	Monday, Tuesday, Wedi	LOAD
EXPORT	IMPORT	
EDIT	MAP	Route Summary
Reset Sequence to 0 on Reroute / Reschedule		
QTY	SITE	SERVICE CODE
1	43890002 COP - SHADOW CREEK RANCH SPORT 13050 SHADOW CREEK PKWY PEARLAND, TX 77584-7458	8 Yard Trash Service 8 Yard FL MSW
1	44892001 DERRICK'S CHRISTMAS TREES 10904 Memorial Hermann Drive Pearland, TX 77584-2184	6 Yard Trash Service 6 Yard FL MSW
1	43890032 COP - WEST PEARLAND LIBRARY 11801 Shadow Creek Parkway Pearland, TX 77584	4 Yard Trash Service 4 Yard FL MSW
2	43890001 COP - FIRE STATION #8 12255 SHADOW CREEK PEARLAND, TX 77584	4 Yard Trash Service 4 Yard FL MSW

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

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

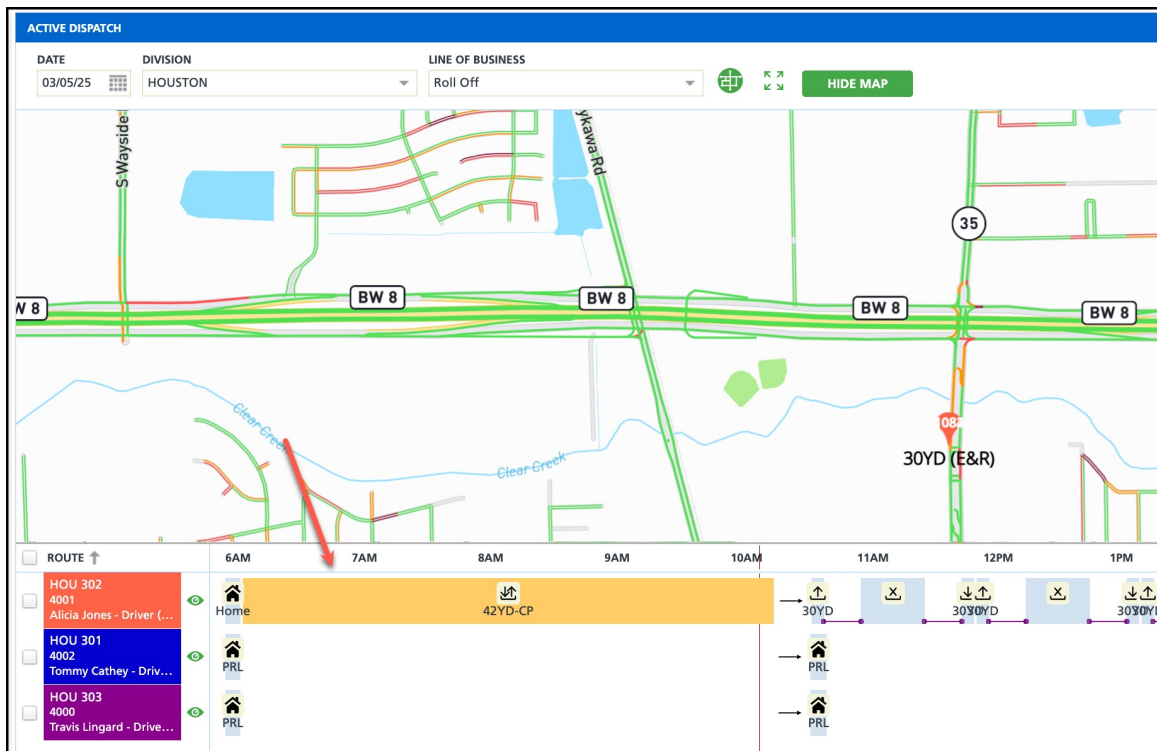
In rare cases, stops did not display when NavuNav provided invalid latitude and longitude values for services marked as completed or with an exception. This issue has been identified and resolved.

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.

The screenshot shows the 'AR AGING MANAGEMENT' interface. The 'DIVISION' filter is expanded, showing a list of divisions: DAYTON, HOUSTON, QAWASTE, All, Texas, -- DAYTON, -- HOUSTON, -- QAWASTE, CORPUS, HEARNE, and HILLSBORO. The 'TYPE' filter is set to 'AR Aging By Past Due Date'. The 'ACCOUNT CLASS' is set to 'asdf, AUTOCH, BROKER, COMMERCIAL, FINANC'. The 'TERM' is set to 'All' and the 'BILL GROUP' is set to 'All'. A 'LOAD' button is visible. Below the filters is a table with columns for 'AVG DAYS TO PAY', 'LAST PAYMENT', 'LAST COLLECTION ACTIVITY', 'CURRENT', '1-30', '31-60', '61-90', '91-120', 'OVER 120', 'TOTAL', 'ACCOUNT MANAGER', 'AUDITOR', and 'BILL GROUP'. The table shows a total of 0.00 for each column.

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

Texas, DAYTON, HOUSTON, QAWASTE

TYPE

AR Aging By Past Due Date

ACCOUNT CLASS

asdf, AUTOCH, BROKER, CLASSTEST, COMMERC

TERM

All

BILL GROUP

All

LOAD

ACCOUNT MANAGER

ACCOUNT STATUS

COLLECTION AGENT

MIN. PAST DUE BALANCE

Account Information

Select Quick Filter

Search

ACT ID	ACCOUNT NAME	STATUS	AVG DAYS TO PAY	LAST PAYMENT	LAST COLLECTIO... 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	1,031,282.0	1,014,582.0	1,050,182.0	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										House Account	(Inactive)	DAY-Q1-JAN-A...
<input checked="" type="checkbox"/>	18854	THEISS KEVIN	Active										House Account	(Inactive)	DAY-Q1-JAN-A...
<input type="checkbox"/>	18861	MARK ANDRESS	Active										Alice Cuevas	(Inactive)	DAY-RESI MON...
<input type="checkbox"/>	18863	ALOUISIRA ELVIRA	Active										House Account	(Inactive)	DAY-Q1-JAN-A...
<input type="checkbox"/>	18870	RASCH CLARA KIL...	Active										House Account	(Inactive)	DAY-Q1-JAN-A...
<input type="checkbox"/>	18872	MORGAN JR. WILL...	Active										House Account	(Inactive)	DAY-Q1-JAN-A...
<input type="checkbox"/>	18877	BLANCHE CURTRES...	Active										House Account	(Inactive)	DAY-RESI MON...
<input type="checkbox"/>	18879	GEORGE DELORES	Active										House Account	(Inactive)	DAY-Q1-JAN-A...
<input type="checkbox"/>	18886	KIRSCH MICHAEL	Active										House Account	(Inactive)	DAY-Q1-JAN-A...
<input type="checkbox"/>	18895	RIORDAN SHARON...	Active										House Account	(Inactive)	DAY-Q1-JAN-A...
<input type="checkbox"/>	18897	WOODMAN YVON...	Active										House Account	(Inactive)	DAY-Q1-JAN-A...
<input type="checkbox"/>	18902	PATTERSON CYNT...	Active										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

Credit Hold

EFFECTIVE DATE

07/29/2024






NOTE

SAVE

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											
	Aug 2024	All	All											
					<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							
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				

PAYMENT SOURCE SETUP			SETUP > ACCOUNTING > PAYMENT SOURCE
<div><div></div><div></div><div>Search</div><div></div><div></div></div>			
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							
<div><div></div><div></div><div>PERIOD</div><div>Oct 2024</div><div></div></div>		<div><div></div><div></div><div>DIVISION</div><div>All</div><div></div></div>		<div><div></div><div></div><div>BANK ACCOUNT</div><div>All</div><div></div></div>		<div><div></div><div></div><div>Open 5</div><div>\$ 600.00</div></div>	
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

PERIOD

Oct 2024

DIVISION

All

BANK ACCOUNT

All

Open 5

\$ 600.00

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

Select Division

DATE

PERIOD

BANK ACCOUNT

BANK OF NAVU

Fort Knox

SOURCE

Navu Bank

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 DEPOSIT	AUTO APPLY
49209	Michael D...	Prospect	\$ 60.31	Credit Card	1234...	101.00	0.00	Apply
49213	Completi...	Prospect	\$ 60.31	Credit Card	1234...	101.00	0.00	Apply
49212	Completi...	Prospect	\$ 60.31	Credit Card	1234...	101.00	0.00	Apply
49211	Completi...	Prospect	\$ 60.31	Credit Card	1234...	101.00	0.00	Apply

Amount \$ 404.00

UN-POST PRINT REPORT VOID IMPORT

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 23 Posted Summary

TYPE: All

TYPE	REFERENCE #	AR PERIOD	DATE	COUNT	ERRORS	AMOUNT	DIVISIONS
TOTALS	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

View Details

## 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 Charge: YEAR: 2023

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			 <input type="text" value="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

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			08/14/2024	
1010	Mail Check Customer Refund Request	Aliena Somers - Admin-NS (Admin)	10/15/2024	Amount: \$ 50.00 , Note: Refund on a service overcharge.	
TOTAL AC CURRING					
SERVICE ID	FREQUENCY	SCHEDULE	ACCOUNT		RATE
		TUE	Oct 1	WED	Oct 2
		THU	Oct 3	FRI	
Sep 30					
Oct 7					
Oct 8					
Oct 9					
Oct 10					
Oct 14					
Oct 15					
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							ACCOUNTING + REFUND REQUEST MANAGEMENT			
DIVISION		DEPARTMENT		ASSIGNED TO USER		REASON				
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 Ex... at 10/30/24 2:15 pm	QAWASTE	49115 Posh's Pies Restaurant & Bak...		\$ 6.87	Credit for overcharge invoice #6789	Returned to Submitter	Susan Silverst1	
1005	Customer Refund Request Credit Card	Paul Gonzalez - QA Ex... at 10/30/24 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 10/10/24 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 Santeiroci		\$ 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
Pending		History				
REFUND REQUEST ID	REASON CODE	CREATED BY	DIVISION	ACCOUNT	CONTACT	AMOUNT NOTE
1005	Customer Refund Req... 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 Req... Credit Card	Paul Gonzalez - Q... at 10/10/24 8:51 am	QAWASTE	48969 Staples Center		\$ 9.99 Testing Refund Request
1012	Customer Refund Req... Mail Check	David Navarro - A... at 11/1/24 2:17 pm	HOUSTON	44442 DSW		\$ 100.00 Billed incorrectly
1016	Customer Refund Req... Credit Card	PG NAVUJ (Custom... at 11/4/24 4:37 pm	QAWASTE	49146 Pho Ga District		\$ 20.00 Testing approval request
1017	Customer Refund Req... Credit Card	PG NAVUJ (Custom... at 11/4/24 4:38 pm	QAWASTE	49103 Lowe's Home Improve...		\$ 55.00 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		ACTIVE
NAME		ENABLE ROUTING
LINE OF BUSINESS		REQUIRE FREQUENCY
EQUIPMENT TYPE		ENABLE DRIVER UPDATE
MATERIAL TYPE		ENABLE ACCOUNT SIGNATURE
UOM	4 week	ENABLE DRIVER SIGNATURE
TAXABLE	No	ENABLE WORK ORDER MINIMUM
GL ACCOUNT		ENABLE RENTAL FEE
TEMPORARY SERVICE GL ACCOUNT		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 Seperate 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
		23			7,862	15,008
<input type="checkbox"/>	Billing Batch	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	10788	2023-01	01/01/2023	1	
<input type="checkbox"/>	Credit Card / eCheck Batch	10790	2023-01	01/02/2023	2	
<input type="checkbox"/>	Credit Card / eCheck Batch	10792	2023-01	01/03/2023	1	
<input type="checkbox"/>	Credit Card / eCheck Batch	10793	2023-01	01/05/2023	1	
<input type="checkbox"/>	Credit Card / eCheck Batch	10794	2023-01	01/07/2023	2	
<input type="checkbox"/>	Credit Card / eCheck Batch	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

DATE11/26/2024

BANK ACCOUNTNAVU WELLS

SOURCENavu 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

STATUSPosted

+

SORT

Entry Order ↓

DEFAULT PAYMENT TYPE

COUNT

1

Search for Payment in Batch

ACCOUNT ID	NAME	STATUS	BALANCE	TYPE	REFERENCE	AMOUNT	APPLIED AMOUNT	DEPOSIT	AUTO APPLY
49232	Caribou Coffee	Active	\$ 300.00	Check	1234	300.00	0.00		

Apply

'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				
COR-Q1-JAN-APR-JUL-OCT										
COR-ROLF BI-WEEKLY										
COR-ROLF BI-WEEKLY										
COR-ROLF MONTHLY										
DAY-COMM MONTHLY A...										
DAY-COMM MONTHLY A...										
DAY-COMM MONTHLY A...										
DAY-MANUAL INVOICES										
DAY-Q1-JAN-APR-JUL-OCT										

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

HOUSTON, QAWASTE

TYPE

AR Aging By Past Due Date

ACCOUNT CLASS

asdf, AUTOCH, BROKER, CLASSTEST, COMMERCIAL, FINANCELA

TERM

All

BILL GROUP

All

ACCOUNT MANAGER

ACCOUNT STATUS

Active, Bad Debt, C

COLLECTION GROUP / AGENCY

COLLECTION AGENT

MIN. PAST DUE BALANCE

600.00

Account Information

Account Information

Select Quick Filter

Search

ACCOU...

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

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...

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...

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...

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...

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...

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...

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...

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...

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...

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...

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 Nov 2024		DIVISION All		BANK ACCOUNT All	
BATCH #		All		Primary	
		QAWASTE		DIVISION	
11427 Note NAVU-17425 Testing		QAWASTE (7 - \$ 354.99) HOUSTON (1 - \$ 100.00)		Payment	Navu Bank
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 Note NAVU-17502 Test		QAWASTE (4 - \$ 121.00) DAYTON (1 - \$ 101.00)		Payment	
11445		QAWASTE (2 - \$ 1,202.53)		Payment	Pineapple Prepayment
11448 Note Test		QAWASTE (1 - \$ 300.00)		Payment	Navu Bank

### Import Button

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

**BATCH - 11437 DIVISION - QAWASTE**

DATE: 11/11/2024 BANK ACCOUNT: BANK OF NAVU Fort Knox SOURCE: Select Source

NOTE: CREATED BY: Navusoft System (Admin) - 11/11/2024 9:08 am POSTED BY: STATUS: Posted

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

ACCOUNT ID	NAME	STATUS	BALANCE	TYPE	REFERENCE	AMOUNT	APPLIED AMOUNT	DEPOSIT	AUTO APPLY	
49254	pg	Active	\$(120.00)	Credit Card	100732545_9...	120.00	0.00	<input type="checkbox"/>	<input type="checkbox"/>	Apply
49249	PG	Active	\$(135.60)	Credit Card	100716233_9...	135.60	0.00	<input type="checkbox"/>	<input type="checkbox"/>	Apply

UN-POST PRINT REPORT VOID IMPORT

Amount \$ 255.60

## 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.

**AR AGING MANAGEMENT**

DIVISION: QAWASTE TYPE: AR Aging By Past Due Date

ACCOUNT MANAGER: ACCOUNT STATUS: Active, Bad Debt, C COLLECTION GROUP / AGENCY: COLLECTION AGENT:

Account Information:

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	5 accounts selected	Active	0		
49096	Update Account Status	Active	0	07/03/24	
49103	Auto Apply	Active	0	11/04/24	
49105	Add Note	Active	0		
49110	Add Task	Active	0		
49112	Send Email	Active	0		
49119	Penney's	Active	0		
49131	Wild Mountain	Active	0	08/07/24	

RECORD COUNT: 80 TOTALS

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 STATUS (Active, Bad Debt, C), and COLLECTION GROUP / AGENCY. Below these 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 a list of actions: 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 table of accounts. A context menu is open over the table, showing '5 accounts selected' and a list of actions: Update Account Status, Auto Apply, Add Note, Add Task, and Send Email. A red arrow points to the 'Update Account Status' option. A dialog box titled 'CHANGE STATUS OF 5 SELECTED ACCOUNTS' is open, showing fields for NEW STATUS, EFFECTIVE DATE, and COLLECTION GROUP / AGENCY. The dialog also has a NOTE field and a SAVE button.

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 displays the 'Billing Analysis' window in a software application. The main window has tabs for 'Pending and In Process' and 'History'. Below the tabs, there are filters for 'DIVISION' (All), 'BILL GROUP' (Residential Monthly), 'TYPE' (All Charges), and 'YEAR' (2024). A table lists the following data:

BATCH ID	DIVISION	TYPE	STATUS	INVOICE DATE	FROM-TO DATE
25777		All Charges	Completed	01/15/2024	01/01/2024 - 01/31/2024

A context menu is open over the '25777' batch ID, showing options: 'Billing Analysis', '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'.

The 'BILLING ANALYSIS WINDOW' has a title bar with a question mark and a close button. It contains a table with the following columns: TYPE, \*INVOICEID, SITE NAME, 2024-01, 2023-12, 2023-11, 2023-10, 2023-09, 2023-08, 2023-07, and 2023-06. The data rows are:

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'.

ACCOUNTING > AR AGING MANAGEMENT

ACCOUNT CLASS: asdf, AUTOCH, BROKER, CLASSTEST, COMMERCIAL, FINANCELATEFEE, TERM: All, BILL GROUP: All, LOAD

COLLECTION AGENT: MIN. PAST DUE BALANCE

SYSTEM OPTIONS SETUP

System Sales Integration Account Operations Customer Portal

THRESHOLD DISCOUNT LAB TEST ID: CREDIT H

API GRAVITY LAB TEST ID: ENABLE

SPECIFIC GRAVITY LAB TEST ID: LIMIT PA

ENABLE SITE BILLING ADDRESS: No LIMIT BIL

ENABLE SITE BILL GROUP: Yes ACCOUNT

ENABLE AGING BY SITE: No SMS DEF

SERVICES GRID DEFAULT VIEW: Standard SMS UN

DEFAULT GENERATOR TYPE: Small Quantity Generator

CREDIT HOLD REASON CODE: Credit Hold

VACATION HOLD REASON CODE: Vacation Hold

AUDITOR ACCOUNT LABEL: Collection Agent

WRITE OFF CHARGE CODE: TEST

REQUIRE SITE SOURCE: No

REQUIRE BROKER GROUP FOR BROKER ACCOUNT CLASS TYPE: Yes

TOTAL ACCOUNT MANAGER: COLLECTION AGENT BILL GROUP

0.00

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.

BATCH - 11467 DIVISION - QAWASTE

DATE: 12/11/2024 BANK ACCOUNT: NAVU WELLS SOURCE: Select Source

NOTE: QA Primary Division CREATED BY: Paul Gonzalez - QA Expert (Admin) - 12/11/2024 11:06 am POSTED BY: Paul Gonzalez - QA Expert (Admin) - 12/11/2024 11:07 am STATUS: Posted

INVOICE APPLICATION

ACCOUNT ID: 48977, 43184

INVOICE #	SITE ID	SITE NAME	DATE	AMOUNT	BALANCE	APPLY AMOUNT	
835854	43184001	AMERIT	11/15/2022	\$ 377.88	\$ 377.88	377.88	Apply
835855	43184002	AMREIT	11/15/2022	\$ 310.81	\$ 310.81	0.00	Apply
835856	43184003	SHADOW CREEK RANCH TOWN CENTER	11/15/2022	\$ 1,361.36	\$ 1,361.36	0.00	Apply
835857	43184004	AMREIT (SHADOW CREEK RANCH TOW	11/15/2022	\$ 684.08	\$ 684.08	0.00	Apply
835858	43184005	AMREIT (SHADOW CREEK RANCH TOW	11/15/2022	\$ 502.81	\$ 502.81	0.00	Apply
835859	43184006	AMREIT (SHADOW CREEK RANCH TOW	11/15/2022	\$ 377.88	\$ 377.88	0.00	Apply
835860	43184007	AMREIT (SHADOW CREEK RANCH TOW	11/15/2022	\$ 1,735.25	\$ 1,735.25	0.00	Apply
						APPLIED TOTAL	\$ 377.88
						AVAILABLE FOR APPLICATION	\$ 122.12

UNAPPLY ALL AUTO APPLY SAVE

UN-POST PRINT REPORT VOID IMPORT Amount \$ 600.00

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
Total								\$ 46,561.72	\$ 5,673.50	\$ 85.13

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

LOAD

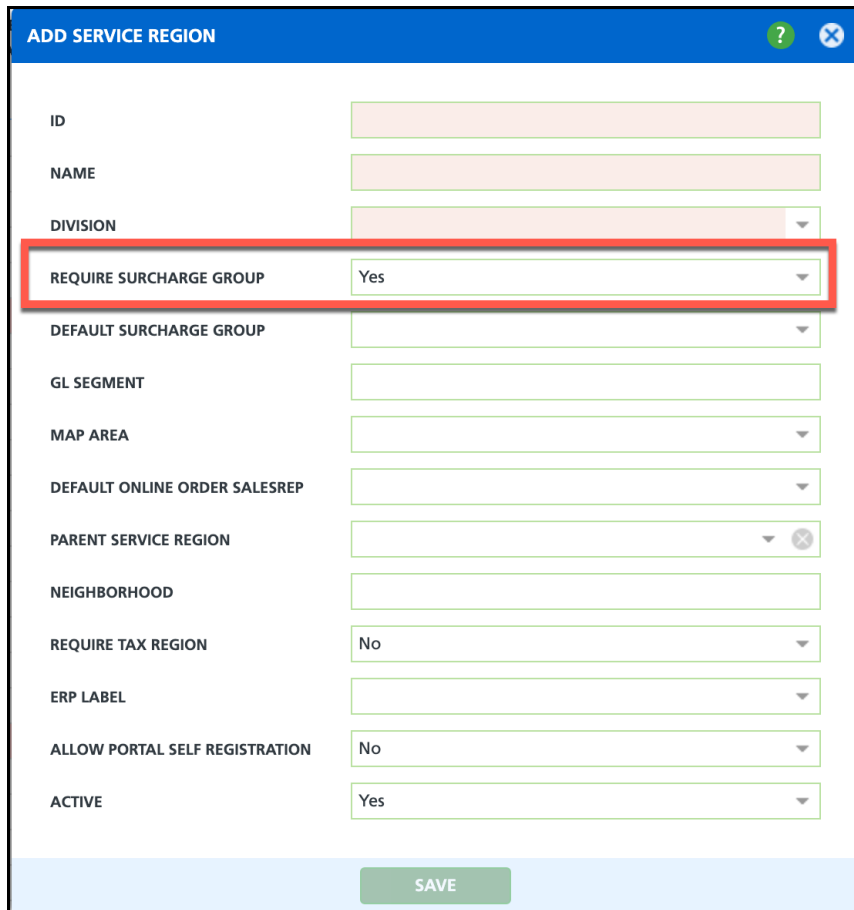
	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG
Beginning Balance	<u>10,592,877.02</u>	<u>10,603,990.97</u>	<u>10,603,952.52</u>	<u>10,603,952.52</u>	<u>10,603,952.52</u>	<u>10,603,952.52</u>	<u>10,603,952.52</u>	<u>10,603,952.52</u>
Imported AR	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Manual Charges	<u>69.95</u>	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Recurring Services	<u>10,262.06</u>	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Surcharges	<u>11.84</u>	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Taxes	<u>853.28</u>	<u>-3.45</u>	0.00	0.00	0.00	0.00	0.00	0.00
Adjustments	<u>-83.18</u>	<u>-35.00</u>	0.00	0.00	0.00	0.00	0.00	0.00
Total	<u>10,603,990.97</u>	<u>10,603,952.52</u>	<u>10,603,952.52</u>	<u>10,603,952.52</u>	<u>10,603,952.52</u>	<u>10,603,952.52</u>	<u>10,603,952.52</u>	<u>10,603,952.52</u>

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. The 'Require Surcharge Group' field is highlighted with a red box and is set to 'Yes'. The form includes 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 'SAVE' button is located at the bottom right 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:

- Service Code,
- Charge Code
- 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	EQUIPMENT	SERVICE CODE	FREQUENCY	PER UNIT	SERVICE FEES
1	8 Yard FL	8 Yard Trash Service	1x per week	0.0000	0.00

DURATION

Permanent

Temporary

Wed

Thu

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	
LOAD						
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.

The screenshot shows the 'UPDATE ACCOUNT CLASS' window with the 'Finance Charges and Other Fees' tab selected. The window has a blue header with a title bar and a close button. Below the header is a navigation bar with tabs: 'Details', 'Customer Portal', 'Payment Processing', 'Status Management', and 'Finance Charges and Other Fees'. The main content area contains a list of fields for configuring account class settings. The 'PER INVOICE FEE 1 CHARGE CODE' field is highlighted with a red box, showing 'Paper Bill Fee' in a dropdown menu. Other fields include 'FINANCE CHARGE TYPE' (During Billing), 'ANNUAL RATE' (0.00), 'CHARGE CODE' (blank), 'CHARGE MINIMUM' (0.00), 'PAST DUE MINIMUM' (10.00), 'INSUFFICIENT FUNDS FEE' (0.00), 'INSUFFICIENT FUNDS FEE CHARGE CODE' (blank), 'CREDIT HOLD PLACEMENT FEE' (0.00), 'CREDIT HOLD PLACEMENT FEE CHARGE CODE' (blank), 'PER INVOICE FEE 1' (10.00), 'PER INVOICE FEE 2 CHARGE CODE' (blank), and 'PER INVOICE FEE 2' (blank). A red error message 'Auto Save Suspended - Validation Error' is visible at the bottom right.

Field	Value
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.

The screenshot shows the 'EDIT ACCOUNT' interface. The 'Billing' section is active, showing fields for 'BILL GROUP' (QA Billing Cycle), 'Advance - Monthly', 'Billed Thru Date None', 'Next Invoice Date Jul 01', 'INVOICE BY EMAIL' (No), 'TERM' (COD), 'CREDIT LIMIT', and 'PAPER BILL FEE' (\$ 8.00 (Default \$ 10.00)). A modal window titled 'OVERRIDE PAPER BILL FEE' is open, showing 'DEFAULT AMOUNT \$ 10.00' and 'Override Amount 8.00'. A red arrow points from the 'PAPER BILL FEE' field to the modal, and another red arrow points from the 'DONE' button in the modal to the 'SAVE' button at the bottom of the form.

### 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

SAVE

## 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.



SERVICE REGION SETUP											
SETUP > SERVICES > SERVICE REGION											
1		DIVISION		ALL		2		3		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...
1001	WOODCREEK	DAYTON	No	Fuel Surcharge - R...	SVCD1001					Yes	No
1002	PARKSIDE AT...	DAYTON	No	Fuel Surcharge - R...	SVCD1002					Yes	No
1003	ATASCA WO...	DAYTON	No	Fuel Surcharge - R...	SVCD1003					Yes	No
1004	ATASCOCITA ...	DAYTON	No	Fuel Surcharge - R...	SVCD1004					Yes	No
1005	KINGS LAKE ...	DAYTON	No	Fuel Surcharge - R...	SVCD1005					Yes	No
1006	HUMBLE - NE...	DAYTON	No	12345678901...						Yes	No
1007	ATASCA OAKS	DAYTON	No		SVCD1007					Yes	No
1008	OAKS OF AT...	DAYTON	No		SVCD1008					Yes	No
1009	STILLWATER ...	DAYTON	No	Fuel Surcharge - R...	SVCD1009					Yes	No
1010	KINGWOOD ...	DAYTON	No	Fuel Surcharge - R...	SVCD1010					Yes	No
1011	LIBERTY COU...	DAYTON	No		SVCD1011					Yes	No
1012	THE COMMO...	DAYTON	No	Fuel Surcharge - R...	SVCD1012					Yes	No
1013	PINEY WOODS	DAYTON	No		SVCD1013					Yes	No
1014	ENCLAVE AT ...	DAYTON	No		SVCD1014					Yes	No
15	15	DAYTON	No							No	No
CORPUS	CORPUS OPE...	CORPUS	No	Fuel Surcharge - C...	SVCDCORPUS	Corpus Test 1				Yes	Yes
DAYTON	DAYTON OPE...	DAYTON	No	Fuel Surcharge - R...	SVCDDAYTON					Yes	No
DeleteMe	Delete Me	QAWASTE	No							No	No
DELT	Delete Me	QAWASTE	No							No	No
Hearne_SR	Hearne_SR	HEARNE	No		SVCDHEARNE					No	No
HOUSTON	HOUSTON O...	HOUSTON	No	Fuel Surcharge - C...	SVCDHOUST...	Houston				Yes	No
LA	LOS ANGELES	HOUSTON	No		SVCDLA					No	No
OC	Orange County	QAWASTE	Yes							No	No
PRLD_MUNI	PEARLAND ...	HOUSTON	No	Pearland Franchise...	SVCDPRLD					Yes	No
QASVCREG	QA Service R...	QAWASTE	Yes		SVCDQAS					No	No
QAWASTE	QA Waste OP...	QAWASTE	No		SVCDQA					No	No
SANDIEGO	SD	QAWASTE	No							No	No

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

Commercial

ACTIVE

Yes

Settings

Mobile

Optimization

Self-Service Ordering

Productivity and Profitability

DAYS AVAILABLE TO DRIVER

Yesterday, Today, & Tomorrow

AUTO COMPLETE SECONDS

5

RECEIPT HEADER TEXT

ACKNOWLEDGEMENT TEXT

SERVICE DESCRIPTION DISPLAY

Quantity - Work Type Name - Material Type ID/Service Code ID - Equipment Type Name

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

The screenshot shows the 'DIVISION SETUP' screen. At the top, there is a blue header bar with the text 'DIVISION SETUP'. Below the header, there is a green plus icon and a 'DIVISION' label next to a dropdown menu labeled 'Select Division'. Below this, there are four tabs: 'Details', 'Credit Card / ACH Processing', 'Cost / Target Pricing', and 'Inter-company'. The 'Inter-company' tab is highlighted with a red border. Below the tabs, there are three fields: 'ENABLE DISPOSAL BILLING' with a dropdown menu, 'BILL TO SITE' with a green magnifying glass icon and a dropdown menu, and 'DISPOSAL CHARGE CODE' with a dropdown menu. Each dropdown menu has a small 'x' icon next to it.

## 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	WILSONVILLE	DAYTON	Landfill	Third Party	Active	4791 Tri City Be...
1006	WILSONVILLE LF	WILSONVILLE	DAYTON	Landfill	Internal	Active	3623 Wilson Rd
1007	WILSONVILLE LF	WILSONVILLE	DAYTON	Landfill	Internal	Active	69
1008	WILSONVILLE LF	WILSONVILLE	DAYTON	Landfill	Third Party	Active	19248 TX-105
1009	WILSONVILLE LF	WILSONVILLE	DAYTON	Landfill	Internal	Active	6632 John Ralst...
1010	WILSONVILLE LF	WILSONVILLE	DAYTON	Landfill		Active	
1011	WILSONVILLE LF	WILSONVILLE	DAYTON	Transfer Station		Active	18784 E Hardy Rd
1012	WILSONVILLE LF	WILSONVILLE	DAYTON	Landfill	Internal	Active	7245 Veterans ...
1013	WILSONVILLE LF	WILSONVILLE	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

FIRST NAME

LAST NAME

Valid email is required. Email with temporary password will be sent to this email.

EMAIL

CELL PHONE

(999) 999-9999

OFFICE PHONE

(999) 999-9999

TITLE

DEPARTMENT

MANAGER

SALES GOAL TYPE

None

EXTERNAL ID

EXTERNAL USER ID

DEFAULT APP COLOR

Dark Gray

WORKER COST PER HOUR LEVEL

DEFAULT HOMEPAGE

ONLINE IMAGE

Select Image...

BROWSE...

AUTOMATIC COUNTERSIGN

No

SIGNATURE IMAGE

Select Image...

BROWSE...

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

Yes

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

☐

REQUIRE SITE CLASS

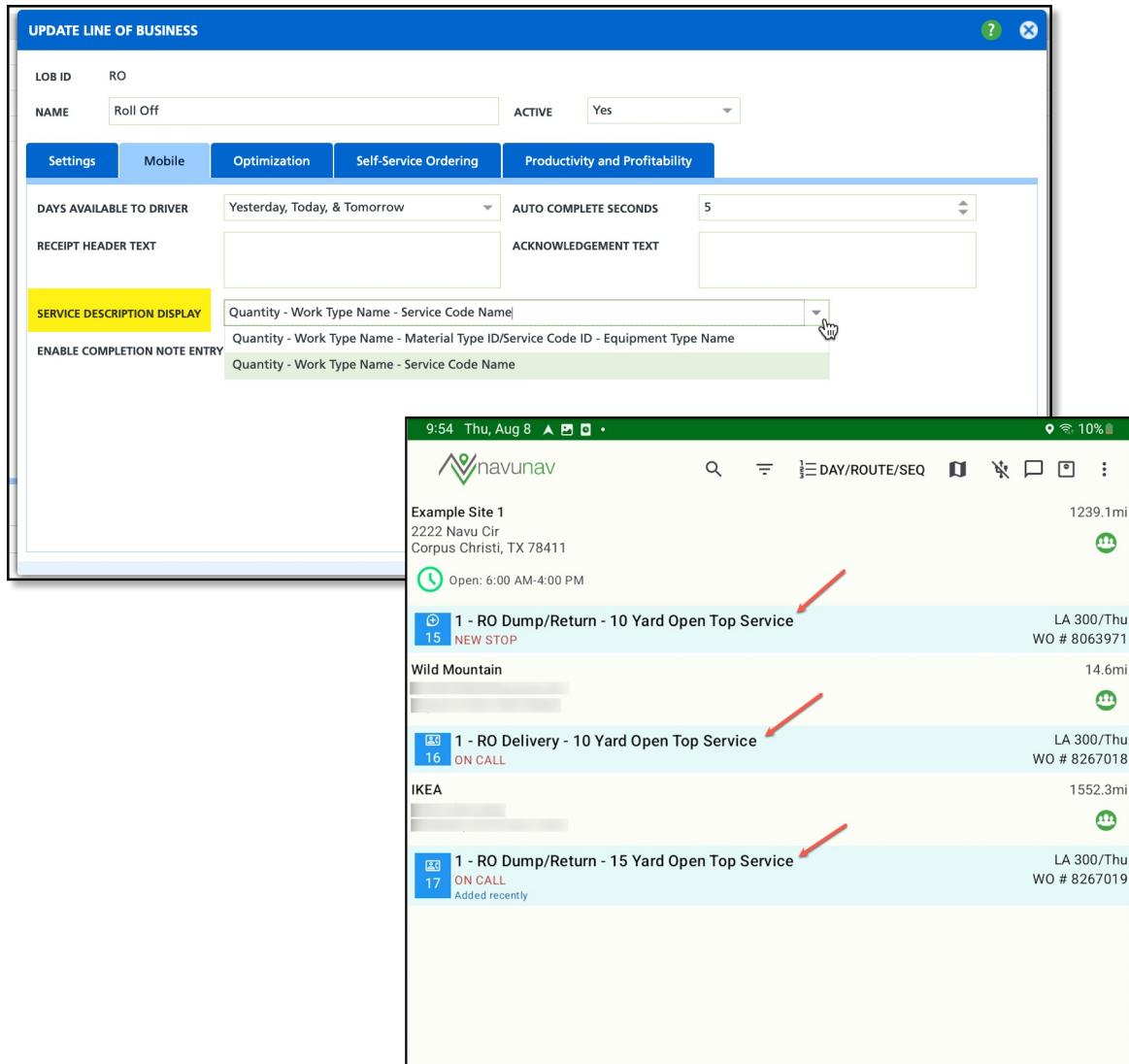
☒

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	
				Search	
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

Downtime

ID

NAME

EXTERNAL ID

DISPLAY IN MOBILE

No

LINE OF BUSINESS

ACTIVE

Yes

SAVE

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

DOCDEST

Document Destruction

HAZ

Hazardous Material

LF

Inbound and Outbound

MEDICAL

Medical Waste

MISC

Miscellaneous

RESI

Residential

RO

Roll Off

SCALE

Scale

## 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

Service Code

ID

NAME

SERVICE CODE

Test

ACTIVE

Yes

FL10R

10 Yr

NAME

Test

ENABLE ROUTING

No

FL10T

10 Yr

LINE OF BUSINESS

Commercial

REQUIRE FREQUENCY

Yes

FL02R

2 Yr

EQUIPMENT TYPE

ENABLE DRIVER UPDATE

No

FL02T

2 Yr

MATERIAL TYPE

Brick

ENABLE ACCOUNT SIGNATURE

No

FL02NP

2 Yr

UOM

Brick

ENABLE DRIVER SIGNATURE

No

FL02VIPR

2 Yr

TAXABLE

Cardboard

ENABLE WORK ORDER MINIMUM

No

FL02VIPT

2 Yr

GL ACCOUNT

Clear Glass

ENABLE RENTAL FEE

No

FL02CDSE

2 Yr

TEMPORARY SERVICE GL ACCOUNT

Colored Glass

ENABLE DEFAULT DESTINATION

No

FL02SVC

2 Yr

PRORATION METHOD

Metal

ENABLE NEGATIVE AMOUNT

No

FL02NWK

2 Yr

VACATION HOLD PRORATION METHOD

MSW

ENABLE ESTIMATES TRACKING

No

FL02PEOC

2 Yr

Trash

ENABLE EQUIPMENT OWNERSHIP

No

FL03R

3 Yr

Do Not Prorate

FL03T

3 Yr

Yes

FL03VIPT

3 Yr

FL04R

4 Yr

FL04T

4 Yr

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 bar with a green 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 is open, showing the following fields and values:

- NAME: Other
- DIVISION: HEARNE
- SALES REP: House Account - House Account (
- SOURCE: Call In
- ACCOUNT CLASS: RESIDENTIALa
- BILL GROUP: (highlighted in yellow)
- TERM: Annual Billing
- REBATE PAYMENT TYPE: DAY-ROLF LIBERTY
- SERVICE REGION: SCALE CASH
- TAX REGION: Test 2
- SURCHARGE GROUP: VENDORS

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	NEIGHBORHOOD	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...	SVCDDAYTON					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

SEARCH

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									
LINE OF BUSINESS Commercial		DIVISION HOUSTON		EQUIPMENT TYPE All		MATERIAL TYPE All		<div> <div>?</div> <div>Search</div> <div>Q</div> <div>✕</div> <div>↺</div> </div>	
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		
LOS ANGELES							None		

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

FCC test online order

ACTIVE

Active

DIVISION

HOUSTON

SERVICE REGION

HOUSTON OPEN MARKET

HOUSTON OPEN MARKET

LOS ANGELES

PEARLAND MUNICIPAL

Bundle Availability

ONLINE ORDER

☒

QUICK ORDER

☐

ADD SERVICE MENU

☐

DOCUMENT FORMAT

Change Form Dayton

DOCUMENT TYPE

A-New Customer-1

ORDER SOURCE

Acquisition

FORCED FUTURE START DATE

01/01/2025

CONTENT IMAGE

Select Image...

BROWSE...

REQUIRE PREPAYMENT

None

REQUIRE AUTO PAY ENTROLLMENT

Yes

AUTO PAY ENROLLMENT MESSAGE

Hello auto pay required

Defaults for New Account

ACCOUNT CLASS

RESIDENTIAL

BILL GROUP

HOU-Q1-JAN-APR-JUL-OCT

TERMS

Net 30

COMPLETION MESSAGE

PREVIEW

SUMMARY

PREVIEW

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

**SURCHARGE CLASS SETUP**

SETUP > SERVICES > SURCHARGE CLASS

ID	NAME	ACTIVE
1	Fuel Surcharge	Yes
2	Franchise Fee	Yes

**EDIT PROPOSAL - 4059**

Settings Services History Attachment Master Agreement Term Addendums **Surcharge Rates**

ID	SURCHARGE	<b>SURCHARGE CLASS</b>	EFFECTIVE DATE	RATE	TYPE	NOTE	DELETE
0							

SAVE PRINT EMAIL Saved at 7:16 am.

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.

**ADD SERVICE CODE**

Service Code

SERVICE CODE		ACTIVE	Yes
NAME		ENABLE ROUTING	No
LINE OF BUSINESS		REQUIRE FREQUENCY	Yes
EQUIPMENT TYPE		ENABLE DRIVER UPDATE	No
MATERIAL TYPE		ENABLE ACCOUNT SIGNATURE	No
UOM		ENABLE DRIVER SIGNATURE	No
<b>TAXABLE</b>	Yes	<b>CLASS</b>	<b>Equipment</b>
GL ACCOUNT		ENABLE WORK ORDER MINIMUM	No
TEMPORARY SERVICE GL ACCOUNT		ENABLE RENTAL FEE	No
PRORATION METHOD	Calendar Days - Start and End	ENABLE DEFAULT DESTINATION	No
VACATION HOLD PRORATION METHOD	Do Not Prorate	ENABLE NEGATIVE AMOUNT	No
BILL WHILE ON CREDIT HOLD	Yes	ENABLE ESTIMATES TRACKING	No
		ENABLE EQUIPMENT OWNERSHIP	No
		ENABLE SHARE	No

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.

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:

- 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](#)

+

DIVISION

ALL

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			

MAP AREA - SERVICE REGION: QA WASTE OPEN MARKET

ZOOM TO SITES

ZOOM TO MAP AREA

HIDE SITES

REMOVE SELECTED SHAPE

+

-

IMPORT

SAVE

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

ACTIVEActive

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

Revenue

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

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

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. It features a table with 'TAX REGION ID' and 'NAME' columns, listing regions from 1000 to 1006. Below this is a 'Tax Rate' tab. A red arrow points to a '+' icon in the tax rate table, which has triggered a modal window titled 'ADD / EDIT TAX RATE'. The modal shows the 'TAX REGION' as 'HAYS ESD 4' and the 'RATE' as '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 %

**ADD / EDIT TAX RATE**

TAX REGION: HAYS ESD 4

TAX:

EFFECTIVE DATE:

RATE:

SAVE

## 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

☒ Limit to

INVOICE ADJUSTMENT - 903631 - 5/1/24 - \$ 10,265.10 - CREATED BY ALIENA SOMERS ON 1/6/25 12:04 PM

?

✕

REASON CODE

Incorrect Price

PERIOD

2025-01

NOTE

☐ CREDIT ENTIRE INVOICE

Search

Q

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	
TOTAL										\$(433.08)

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*.

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

Saved.

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

ADJUSTMENT AMOUNT REQUIRING 2 APPROVALS

300.00

REFUND AMOUNT REQUIRING 2 APPROVALS

CANCELLATION REQUEST AMOUNT

LOGO URL

Select Image...

BROWSE...

View

## 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 HISTORY AND PENDING APPROVAL							
ACCOUNTING > INVOICE ADJUSTMENT - PENDING APPROVAL AND HISTORY							
DIVISION		All					
Pending Approval 6		History					
ADJUSTMENT ID	DIVISION	ACCOUNT	ACCOUNT NAME	INVOICE	AMOUNT	REASON CODE	DATE
Count: 6				Total Amount:	\$(1,960.27)		
11428	CORPUS	33246	WASTE MGMT - HEB ST...	837056	\$(102.07)	COURTESY	11/06/24
		Requires 2 Approvals					
		Note: notes					
11370	QAWASTE	49050	Nothing Bundt Cakes	895475	\$(90.00)	INV_PRICE	06/13/24
11473	HOUSTON	46465	RUBICON	899734	\$(898.04)	WRITE_OFF	12/17/24
		Requires 2 Approvals					
11453	QAWASTE	49101	IKEA	900159	\$(85.00)	ADJ-TEST	11/25/24
11386	QAWASTE	49096	Food4Less	901052	\$(352.08)	ADJ-TEST	07/19/24
		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
		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 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: JPG 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

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;;

KEY PATHS

Search

account.billingaddress.addressline1

account.billingaddress.addressline2

account.billingaddress.city

account.billingaddress.postalcode

account.billingaddress.state

account.name

account.name2

account\_id

billgroup.invoice\_from\_email

division.addressline1

division.addressline2

division.billingaddress.addressline2

division.billingaddress.postalcode

division.billingaddress.state

division.city

division.dbaname

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.'

ADD SERVICE CODE

Service Code

SERVICE CODE

NAME

LINE OF BUSINESS

EQUIPMENT TYPE

MATERIAL TYPE

UOM

TAXABLE

No

CLASS

GL ACCOUNT

TEMPORARY SERVICE GL ACCOUNT

PRORATION METHOD

Calendar Days - Start and End

VACATION HOLD PRORATION METHOD

Do Not Prorate

BILL WHILE ON CREDIT HOLD

Yes

IS AP TRANSACTION

No

EST MONTHLY VOL UOM

IS SHELL

No

PRICING MODEL

None

CALCULATE RATE PER YARD

No

WORK TYPE EVENT CLASS

BILL ZERO AMOUNT

No

ACTIVE

Yes

ENABLE ROUTING

No

REQUIRE FREQUENCY

Yes

ENABLE DRIVER UPDATE

No

ENABLE ACCOUNT SIGNATURE

No

ENABLE DRIVER SIGNATURE

No

ENABLE WORK ORDER MINIMUM

No

ENABLE RENTAL FEE

No

ENABLE DEFAULT DESTINATION

No

ENABLE NEGATIVE AMOUNT

No

ENABLE ESTIMATES TRACKING

No

ENABLE EQUIPMENT OWNERSHIP

No

ENABLE SHARE

No

ENABLE VENDOR

No

ENABLE SITE SERVICE CLASS

No

ENABLE DISCOUNTS

No

DO NOT BILL UNTIL DELIVERY COMPLETED

No

SAVE

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."

SYSTEM OPTIONS SETUP

System

Sales

Integration

Account

Operations

Customer Portal

Broker

Online Order

CREATE SERVICE RECORDS IN ADVANCE (DAYS)

45

Mobile Device Settings

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

MATERIAL TYPE SETUP

MATERIAL CLASS

All

LINE OF BUSINESS

Commercial

ID

NAME

GL SEGMENT

EXTERNAL ID

IDENTIFIER

PACKAGE SIZE

MATERIAL CLASS

PROFILED 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.

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:

- The file must be in CSV format
- 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 icons and labels for various modules: HOME, ACCOUNTS, SALES, OPERATIONS, ACCOUNTING, REPORTS, DASHBOARD, SETUP, and DATABASE. The DATABASE module is selected, and its dropdown menu is open, showing options like Bulk Update, Database Query, 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 its sub-menu is also open, listing options such as Import Account/Site Info, Import Credit Card Accounts, Import Fuel Record, Import Manual Charges, Import Matrex Scale Tickets (highlighted with a red arrow), Import Paycom Payroll Import, Import Services, and Import User. In the main content area, there is a table with columns: REQUESTS, TASKS, QUOTES/CONTRACTS, APPOINTMENTS, and ACTIVITIES. The table contains data for various requests, tasks, and quotes. A modal window titled 'IMPORT MATREX SCALE TICKETS' is open, showing a 'SELECT FILE' section with a 'Select File...' button and a 'BROWSE...' button, and an 'IMPORT' button at the bottom.

REQUESTS	TASKS	QUOTES/CONTRACTS	APPOINTMENTS	ACTIVITIES
Damage Navusoft Premier Waste And Recycling Hold - 192 days old	Aug 30 2024 Initial Contact Pauleen Horn	Food4Less A-New Business-Acquisition \$ 320.00		
Billing Error LARRY B Open - 143 days old		Studio A A-New Business-New Owner \$ 130.00		
		Polly Pie 2 New Business Vendor \$ 100.00		

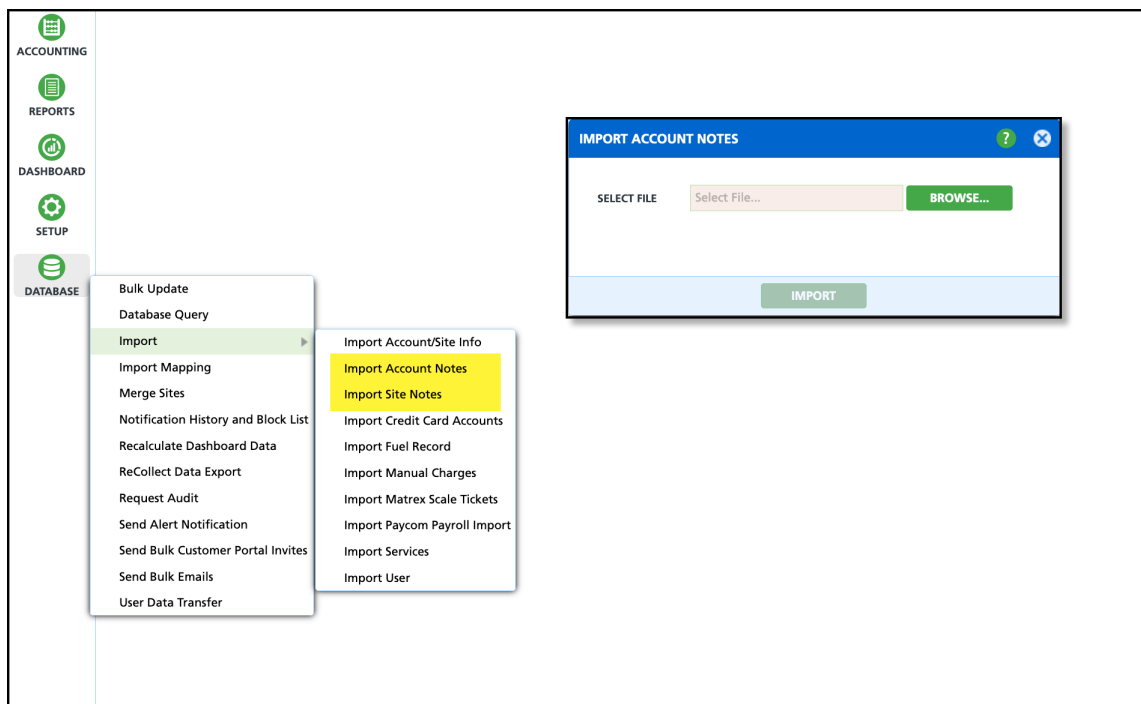
Pathway: Database > Import > Import Matrex Scale Tickets

## 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:

- **470** - Import Account Notes
- **471** - Import Site Notes

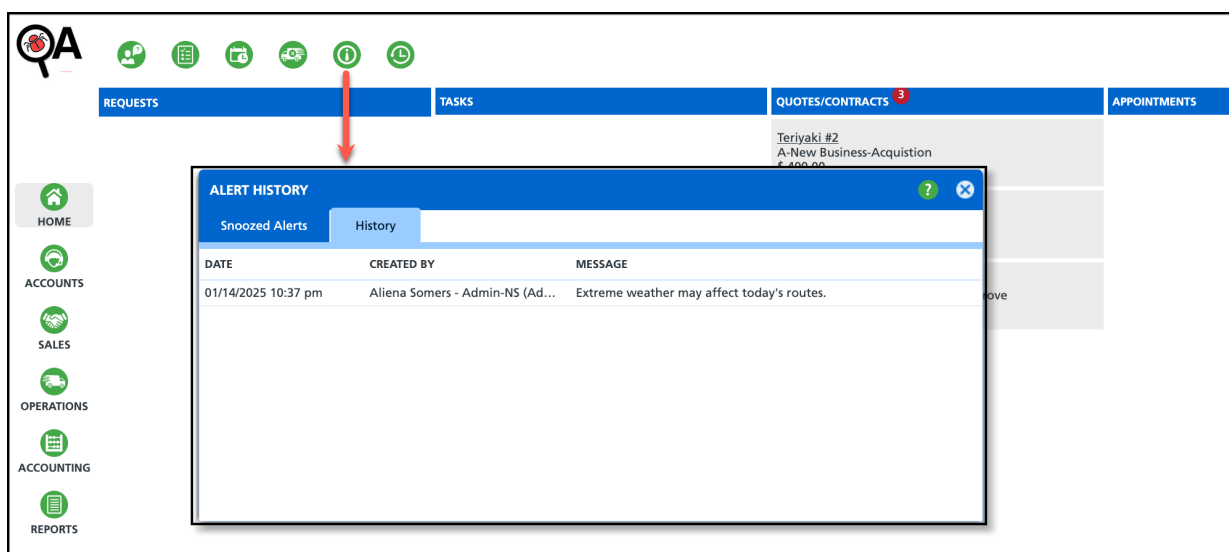


Pathway: Database > Import Account Notes; Import Site Notes | Setup > System > Role  
Article Link: [Import Account or Site Notes](#)

## 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)

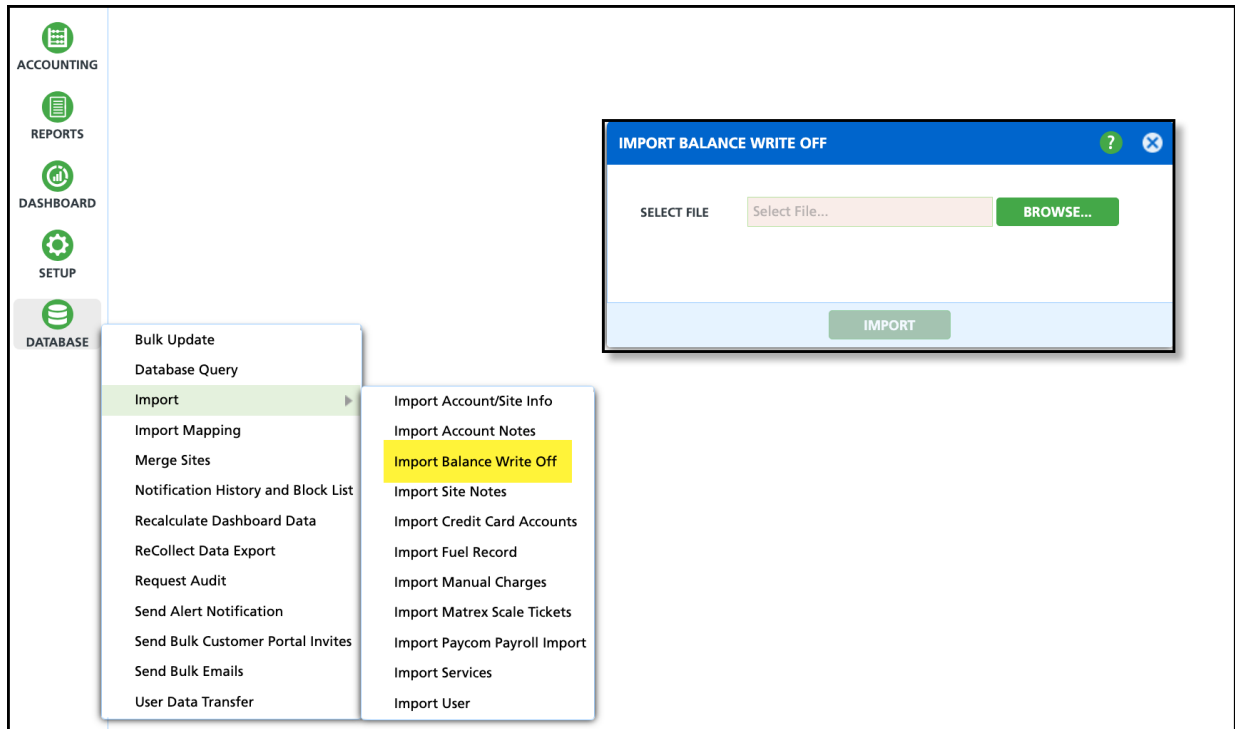
Articles: [Send Alert Notification](#)

## 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](#)