

Release Version 75 [Archive]

Last Modified on 04/15/2026 1:57 pm PDT



The release notes in this article correspond to release version 75. Screens and logic may have changed in newer versions.

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

Expand All Sections

Collapse All Sections

Accounts

Work Order (Accounts) - Work Order Not Generated When Adding a New Service to a Contract (18123)

An issue that prevented work order creation when adding a new service to a contract has been resolved. Previously, if a service not already established on an account was added, the system failed to trigger the delivery work type event.

ID	START DATE	EST. CLOSE DATE	FORMAT	STATUS	MONTHLY REVENUE	SALES REP	TITLE
4160	03/20/25	03/20/25 Medium	Service Contract - signature (NE... A-New Business-From Competitor	Sold	\$ 259.80	Alliena Somers - Admin-NS (Sales) Alliena Tester (Operations)	

Pathway: Accounts > Orders, Quotes and Contracts

Customer Service (Accounts) - VIP Priority Sites (18297) [New Feature]

A new 'VIP' priority indicator has been added to the Add/Edit Site screen to designate service locations with VIP status. When selected, this indicator will appear on the Customer Service screen, in Dispatch on the Services List, and on the driver app. Note: this is a visual indicator only and does not impact routing or scheduling logic.

EDIT SITE

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

NAME: Viebrock Associates

NAME 2: [Empty]

ADDRESS LINE 1: 2669 VIEBROCK DR

ADDRESS LINE 2: [Empty]

CITY/STATE/POSTAL CODE: OSCEOLA WI 54020-4

PHONE 1: (651) 238-7026 Office

PHONE 2: (999) 999-9999

OLD ID: [Empty]

PO#: [Empty]

SIGNATURE REQUIRED: LEED REPORTABLE: **VIP:**

NOTE: [Empty]

WARNING ON OPEN: [Empty]

ACCESS INFORMATION: [Empty]

DIVISION: QAWASTE

SERVICE REGION: Delete Me

TAX REGION: [Empty]

ORIGIN: [Empty]

SOURCE: Call In

SALES REP: Aliena Somers - Admin-NS (Sales)

SITE CLASS: [Empty]

GENERATOR: Small Quantity Generator

EPA: [Empty]

STATE ID: [Empty]

ADDITIONAL SERVICE MINUTES: [Empty]

49315001 Viebrock Associates

1 of 1

2669 VIEBROCK DR
OSCEOLA, WI 54020-4042

US

(O) +1 651-238-7026

Active

DIVISION: QAWASTE

SERVICE REGION: Delete Me

SALES REP: Aliena Somers - Admin-NS (Sales)

SOURCE: Call In

GENERATOR: Small Quantity Generator

TAX REGION: <Not Set>

TAX EXEMPT: No

LEED REPORTABLE: No

LAST ACTIVITY	FREQUENCY	SCHEDULE	PER UNIT RATE	RATE	WO MIN.	START DATE	END DATE	CONTRACT EXP.
Gallon Cart	1x per week	T	\$ 25.00	\$ 25.00 per month		03/03/25		

Legend: WED, THU, FRI, SAT

Apr 2, Apr 3, Apr 4, Apr 5

Site Truck Inventory (Accounts) - Edit/Save Logic Updated (17891)

Previously, editing a truck from the Site Inventory screen triggered a full refresh of the account and related fields after each save, causing the screen to blink and making it difficult to edit multiple fields within the popup. Logic has been updated to delay the screen refresh until the popup is closed.

SITE INVENTORY

Equipment Trucks ¹

Show Inactive

NAME ↑	LICENSE PLATE	LINE OF BUSINESS	TRUCK TYPE	DEP	DOT	TARE WEIGHT
Truck 1	ADV 123	Commercial				8,500 lbs

EDIT TRUCK

NAME

LINE OF BUSINESS

TRUCK TYPE

LICENSE PLATE

VIN

EXTERNAL ID

TARE WEIGHT UOM

Permits Attributes Tare History

DEP EXPIRATION DATE

DOT EXPIRATION DATE

MARK INACTIVE

Apr 29

FORMAT

ON WO#

Orders, Quotes and Contracts (Accounts) - Proposal/Contract Price Change Doesn't Recreate Service Record (18154)

An issue has been resolved that prevented service records from being generated when processing a price decrease through a contract.

ID	START DATE	EST. CLOSE DATE	FORMAT	STATUS	MONTHLY REVENUE	SALES REP
4164	04/14/25	04/14/25	Service Contract - signature (NEW) A-New Business-New Owner	Sold	\$ 100.00	Aliena Somers - Admin-NS (Sales) - DO NOT USE (Admin)
4165	04/14/25	04/14/25	Service Contract - signature (NEW) Chg Svc-Price Decrease	Sold	\$ 80.00	Aliena Somers - Admin-NS (Sales) - DO NOT USE (Admin)

Contacts (Accounts) - Contact 2 Selection Defaults to Primary Billing Contact 1 Upon Save (18192)

When assigning a contact as Primary Billing Contact 2, the system was incorrectly saving them as Primary Billing Contact 1.

TYPE	BILLING CONTACT ↑	NAME	TITLE	EMAIL	PHONE
Account	Primary Billing Contact 1	Aliena			
Account	Primary Billing Contact 2	Paul			

Pathway: Accounts > Customer Service Screen > Contacts

AR History (Accounts) - Error Message Displays When Attempting to Process a Write-Off (18111)

An issue has been resolved that caused an error message to appear when a user attempted to process a write-off

in AR History.

INVOICE ADJUSTMENT - 888863 - 8/14/23 - \$ 502.50 - CREATED BY ALIENA SOMERS ON 5/14/25 3:50 PM

REASON CODE Write Off PERIOD 2025-05 NOTE

CREDIT ENTIRE INVOICE

Search

DATE	SITE ID ↑	SITE NAME	WO #	QUANTITY	DESCRIPTION ↑	INVOICE AMOUNT	PREVIOUS ADJUSTME...	PENDING ADJUSTME...	REJECTED ADJUSTME...	ADJUSTME... AMOUNT
06/21/21	32404009	GOODWILL	1938...	1	Roll Off Haul	\$ 167.50	\$ 0.00	\$ 0.00	\$ 0.00	
07/05/21	32404009	GOODWILL	2000...	1	Roll Off Haul	\$ 167.50	\$ 0.00	\$ 0.00	\$ 0.00	
07/19/21	32404009	GOODWILL	2143...	1	Roll Off Haul	\$ 167.50	\$ 0.00	\$ 0.00	\$ 0.00	

Pathway: Customer Service Screen > AR History

Add Account & Add Site (Accounts) - Display 'Suggested' Service Regions (18433)

Suggested Service Regions have been added to the Add Account and Add Site screens. Suggested regions are determined based on the address's latitude and longitude, falling within the polygon defined in Service Region Setup.

CREATE ACCOUNT

STATUS Prospect SOURCE Call In ACCOUNT DIVISION QAWASTE

Service Address

NAME 8040 Loren Ln

NAME 2

ADDRESS LINE 1 8040 Loren Ln

ADDRESS LINE 2

CITY/STATE/POSTAL CODE Rosemead CA 91770-3969

PHONE (999) 999-9999

WEBSITE

PO#

EPA

SIGNATURE REQUIRED VIP

CONTACT NAME TITLE

CONTACT PHONE (999) 999-9999 PHONE TYPE BILLING CONTACT

SALES REP SITE CLASS GENERATOR TYPE Small Quantity Generator

ACCOUNT CUSTOM PROPERTIES

SITE CUSTOM PROPERTIES

SERVICE REGION Los Angeles

SUGGESTED

Los Angeles

QA Waste OPEN MARKET

OTHERS

Bunn NC

Delete Me

Orange County

QA Service Region 2

SD

SERVICE REGION SETUP

ID ↑	NAME	DIVISION	REQUIRE SURCHARGE GROUP	DEFAULT SURCHARGE GROUP	GL SEGMENT
BUNN	Bunn NC	QAWASTE			
DeleteMe	Delete Me	QAWASTE			
DEL	Delete Me	QAWASTE			
LOS ANG	Los Angeles	QAWASTE			
OC	Orange County	QAWASTE			
QASVREG	QA Service Region 2	QAWASTE			
QAWASTE	QA Waste OPEN MARKET	QAWASTE			
SANDIEGO	SD	QAWASTE			

MAP AREA - SERVICE REGION: LOS ANGELES

Map

Pathway: Accounts > Add Account / Add Site

Edit Active Service (Accounts) - Updates to Future Site Service Charges (18085)

An issue has been resolved where charge codes were duplicated when a service had a pending change, either through the Edit option or a Rate Update Batch, with a future start date and an additional edit was applied.

The screenshot displays an account overview for 'Test - Leads Analysis' (Account ID: 48954). The address is 12341 Aberdeen St NE, Blaine, MN 55449-5144, US. The account is 'Active' and managed by 'Aliena Somers'. Billing terms are 'Net 20' and 'Printed'. The account is divided into 'CORPUS' and 'House Account - House Account (Sales)'. Billing is on a 'DAY-ROLF BI-WEEKLY' basis, with a 'Billed Thru Date Jul 17, 2023'. Arrears are noted as 'ARREARS - TWICE A'. A table shows current balances for various periods (1-30, 31-60, 61-90, 91-120) all at 0.00. A 'HIGHLIGHTS' section lists three items: 'Account is significantly past due', 'On call service 10 Yard Open Top Service (37917) no completed activity since 7/14/2023 (686 days ago)', and 'On call service 10 Yard Recycle Service43 (37937) no completed activity since 8/11/2023 (658 days ago)'. A 'PENDING' section lists items 9313 (Billing), 9325 (Test - Ex), and 16220 (Docume). The 'ACTIVE SERVICES' section shows a total recurring charge of \$120.00. A list of services includes: 1 10 Yard Open Top Service, 1 10 Yard Open Top Service, 1 20 Yard Compactor Service, 1 15 Yard Open Top Service, and 1 10 Yard Recycle Service43. A callout box for the 10 Yard Recycle Service43 shows a 'Front Load 10YD Extra Pickup' of \$94.86 each, effective 6/2/2025, and another 'Front Load 10YD Extra Pickup' of \$100.00 each. The reason for the service is 'ADD-New Business' and it was posted by 'Aliena Somers - Admin-NS (Sales) on 08/11/2023'.

Contracts/Proposals (Accounts) - Ability to Text Message Documents for Viewing and Signing (18405) [New Feature]

Proposals and Contracts now support sending documents to contacts via text message for viewing and signing. To accommodate this enhancement, the **Send Email** button has been replaced with a **Send Notification** drop down, offering options for **Email** and **Text Message**. Similar to the email method, if a contact is associated with the account, they will display in the **Send to Contact** drop down for quick selection.

EDIT DOCUMENT - PROPOSAL 4175

Settings Services History Attachment Master Agreement Term Addendums Surcharge Rates

MAP SERVICE LOCATIONS

SITE ID	START DATE	QTY	SERVICE CODE	FREQ
49317001		1	10 Yard Open Top Service - Recycle	On

TEXT MESSAGE PROPOSAL

SEND TO CONTACT

MOBILE PHONE (999) 999-9999

TEMPLATE Please Sign QA Waste Service Agreement

Please view and approve attached proposal

SEND

SAVE PRINT SEND NOTIFICATION

EMAIL TEXT MESSAGE

Saved at 10:05 am.

Pathway: *Accounts > Orders, Quotes and Contracts*

Add Manual Charge (Accounts) - Logic Updated to Charge Codes Disabled from 'Manual Charge' (18703)

The logic for the Charge Code field in the Add/Edit Manual Charge screen has been updated to prevent charge codes without "Enable Manual Charge" set to "Yes" from appearing when using the field as a search box.

UPDATE CHARGE CODE
?
✕

Charge Code
Surcharges
Default for Work Types

<p>CHARGE CODE <input type="text" value="ADJ-CO"/></p> <p>NAME <input type="text" value="Adjustment-Commercial"/></p>	<p>ACTIVE <input type="text" value="Yes"/></p> <p>ENABLE NO CHARGE QUANTITY <input type="text" value="Yes"/></p> <p>ENABLE NEGATIVE AMOUNT <input type="text" value="Yes"/></p> <p>ENABLE MAX. WEIGHT CHARGE <input type="text" value="No"/> UOM <input type="text"/></p> <p>ESTIMATED AVERAGE WEIGHT <input type="text"/></p> <p>ENABLE MANUAL CHARGE <input type="text" value="No"/></p> <p>ENABLE MINIMUM <input type="text" value="Yes"/></p> <p>ENABLE VENDOR <input type="text" value="No"/></p> <p>ENABLE EST. CHARGE QUANTITY <input type="text" value="No"/></p> <p>PRICING MODEL <input type="text" value="None"/></p>
---	--

ADD/EDIT MANUAL CHARGE
?
✕

CHARGE CODE

QUANTITY

PER UNIT RATE

AMOUNT

PO NUMBER

BLANKET PO

DATE

NOTE

INCLUDE ATTACHMENT WITH INVOICE

Choose a file or drag it here.

Pathway: Setup > Services > Charge Code | Customer Details > Calendar [Add Manual Charge]

Customer Service (Accounts) - Updating Service Keeps Prior Scheduled Day (18364)

An issue has been resolved in **Edit Active Service** that caused the previous service day(s) to be retained when a new service day was selected and saved.

EDIT ACTIVE SERVICE

REASON CODE: CHG-Service Increase START DATE: 06/30/25 Monday Week 27 (B) 5.92 per cubic yard (current)
2.96 per cubic yard (new)

QTY: 1 EQUIPMENT: 6 Yard FL SERVICE CODE: 6 Yard Trash Service FREQUENCY: 2x per week PER UNIT: 0.0000 SERVICE FEES: 0.00 month
Below Light Weight

EQUIPMENT OWNERSHIP: Choose one

SERVICE DAYS: M T W H F S Su * Current Schedule: H

REQUESTED BY: _____

DEFAULT DESTINATION: _____

DISPLAY ALL LINES OF BUSINESS

SERV...	RATE	UOM	NO CHARGE QTY	EST QTY	MINIMUM TYPE	MINIMUM	MAX WEIGHT	OVER MAX WEIGHT RATE	WORK TYPES
Fro...	\$ 60.00	each	0		None				1

SAVE

Pathway: Customer Service (Accounts) > Edit Active Service

Customer Service (Accounts) - Frequency Logic Updated When Changing Frequency to Monthly (18587)

Previously, when the service was updated to a monthly frequency and the service day remained the same, service records were not being generated. This issue has been resolved.

EDIT ACTIVE SERVICE

REASON CODE: CHG-Temp Decrease In Svc START DATE: 07/24/25 Thursday Week 30 (A) 5.92 per cubic yard (current)
8 per cubic yard (new)

QTY: 1 EQUIPMENT: 6 Yard FL SERVICE CODE: 6 Yard Trash Service FREQUENCY: Monthly PER UNIT: 48.0000 SERVICE FEES: 48.00 month
Heavy Weight

EQUIPMENT OWNERSHIP: Choose one

SERVICE DAYS: M T W H F S Su WEEK OF MONTH: _____
* Current Schedule: H

REQUESTED BY: _____

DEFAULT DESTINATION: _____

DISPLAY ALL LINES OF BUSINESS

SERV...	RATE	UOM	NO CHARGE QTY	EST QTY	MINIMUM TYPE	MINIMUM	MAX WEIGHT	OVER MAX WEIGHT RATE	WORK TYPES
Fro...	\$ 60.00	each	0		None				1

SAVE

Pathway: Customer Service (Accounts) > Edit Active Service

Shared Services (Accounts) - Enhancements to Parent and Child Sites of Shared Services (18509)

The following enhancements have been applied to shared services:

Parent Site of a Shared Service

1. The **Share** icon has been moved to its own column, allowing it to remain visible even when the service is collapsed.
2. Logic has been updated to allow entry in either the **Amount** column or the **Percentage** column, **not both**.
3. On the map, the **Share** icon will not display if the selected site is already listed as a shared site or is the parent site. Additionally, the following map logic was updated:
 - **Share sites** are labeled as **S1, S2, S3**, and so on.
 - **Parent sites** display as **P**.
 - By default, the system zooms to focus on the parent site and the five closest pins.

MAP ID	SITE ID	SITE NAME	ADDRESS	STATUS	AMOUNT	PERCENTAGE	NOTE
	49432001	Osceolas Guac N Roll	444 N Cascade St Osceola, WI 54020	Active		50 %	
P	49433001	Subway	402 N Cascade St Osceola, WI 54020 Polk County US	Active	50 %		

Child Site of a Shared Service

1. In the expanded service details, the parent site's name, address, and ID for the shared service are displayed.
2. The Per Unit Rate and Rate are shown based on the percentage or amount defined for the shared service.
3. A background color has been added to indicate shared services, which is also represented in the Legend.

The screenshot displays a utility account management interface. At the top, account details for 'Osceolas Guac N Roll' are shown, including address (444 N Cascade St, Osceola, WI 54020) and account status (Active). Below this, a table lists 'ACTIVE SERVICES (1)' with columns for QTY, SERVICE CODE, SERVICE ID, LAST ACTIVITY, FREQUENCY, SCHEDULE, PER UNIT RATE, and RATE. A service for '2 Yard Trash Service' is listed with a rate of \$12.50 per month. A 'CALENDAR' view for June 2025 is shown at the bottom, with a 'PENDING' tab selected. A 'Service Status Legend' popup is visible on the right, listing various service statuses like 'Child Shared Service', 'Pending Service change', and 'Prospect Service'.

Wallet (Accounts) - Wallet Feature Now Available to Prospect Accounts (18797) [New Feature]

The Wallet feature is now available for prospect accounts. When viewing the Account Wallet for a prospect, the *View History* and *Post Payment* columns are hidden.

The screenshot shows the 'ACCOUNT WALLET' feature for a prospect account. The account details for 'Example Account 5' (12345 Arcola Trail N, Stillwater, MN 55082-5520) are displayed as 'Prospect'. A red arrow points to the 'WALLET (1)' link. Below, a table lists the wallet information:

ACCOUNT HOLDER NAME	TYPE	LAST 4 DIGITS	EXPIRATION DATE	STATUS	AUTO PAY	DAY OF MONTH	AUTO PAY MAX	CREATED BY	PROCESSOR
John Smith	Visa	1111	01/28	Active	No			Paul Gonzalez - ...	CardPointe

Pathway: Customer Service Screen > Wallet (Account Details)

Billing Settings (Accounts) - Logic Updated to Surcharge Group Billing Setting (18767)

The logic for the Surcharge Group field has been updated to exclude inactive surcharge groups from the drop down list.

EDIT SITE

Basic Settings
Billing Settings
BIC Profile
Required Capabilities

TAX EXEMPT?	<input type="checkbox"/>
TAX EXEMPT REASON	<input style="width: 100%;" type="text"/>
SURCHARGE GROUP	Fuel Surcharge - Residential ▼ ✕
INVOICE BY EMAIL	Account Settings ▼
SITE BILLING CONTACT1	<input style="width: 100%;" type="text"/> ▼
SITE BILLING CONTACT2	<input style="width: 100%;" type="text"/> ▼
PAYEE NAME	<input style="width: 100%;" type="text"/>

Pathway: Customer Service Screen > Site Details [right click] > Billing Settings [Edit Site]

Service Records (Accounts) - Updates to Posting Permissions (18768)

Posting status logic within the service record has been updated, affecting the following permissions: 341 (Change Work Order to Ready to Post), 342 (Change Work Order to Posted), and 472 (Reverse Work Order Posting Status).

Scenario Examples

- If a work order is in a **Posted** status, the user can reverse it 'Pending' or 'Ready to Post' if they have both permission **472** and **342**.
- If a work order is in a **Ready to Post** status, the user can reverse to 'Pending' if they have permission **472**. They will need permission **342** to change it to 'Posted'.
- If a work order is in a **Pending** status, the user will need permission **341** to change it to 'Ready to Post' and **342** to change it to 'Posted'.

EDIT SERVICE RECORD

Site # 49433001
 Subway
 402 N Cascade St
 Osceola, WI 54020
 PHONE
 CREATED BY
 Aliena Somers - Admin-NS (Sales) on 6/30/25
 7:52 pm
 ORDER REASON

WORK ORDER 9888666 QTY 1 SERVICE CODE 2 Yard Trash Service (38995) EQUIPMENT 2YD WORK TYPE FL_SERVICE ORDER TYPE Scheduled Service MATERIAL MSW

ORDER NOTES

PO NUMBER EXTERNAL ID

SCHEDULED DATE 07/17/25 Thursday ROUTE LA 101 - Aliena Somers SEQUENCE 0 DESTINATION / ORIGIN

WORK STATUS Scheduled EXCEPTION REASON POSTING STATUS Posted

Charges 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

Pathway: Service Record | Setup > System > Permission

[75.1 Release] Edit Active Service (Accounts) - Credit Amount Not Displaying for Ended Services with Proration Configured (18986)

When a service was terminated during a billing period that had already been invoiced, and proration was configured for the service code, the prorated credit amount did not display on the Edit Active Service screen. This has been resolved.

EDIT ACTIVE SERVICE

REASON CODE END-Closed Business Week 31 (B) END DATE 08/06/25 Wednesday BILLED THROUGH DATE 2025-08-31 CREDIT \$(52.42)

QTY 1 EQUIPMENT 2 Yard FL SERVICE CODE 2 YD FL Calendar Days Start FREQUENCY 1x per week PER UNIT 65.0000 SERVICE FEES 65.00 month

REQUESTED BY

FL Removal ROUTE DATE 08/06/25 Wednesday

WORK ORDER NOTES

Pathway: Customer Service Screen (Accounts) > [Edit] Active Service

[75.1 Release] AR History (Accounts) - Auto Apply Process Not Applying Unapplied Payments (18988)

An issue has been resolved that prevented the Auto Apply link in AR History from applying unapplied payments to open invoices.

AR HISTORY									
CURRENT	1-30 DAYS	31-60 DAYS	61-90 DAYS	91-120 DAYS	120+ DAYS	TOTAL			
0.00	0.00	0.00	0.00	0.00	0.00	0.00			
<input checked="" type="checkbox"/> Limit to open items	STATEMENT	INVOICE	AUTO APPLY	BALANCE WRITE OFF	WALLET (0)	Search			
DATE ↓	DUE DATE	PERIOD	SITE ID	TYPE	REFERENCE NO	AMOUNT	APPLIED AMOUNT	BALANCE	
07/31/25	08/20/25	2025-07		Invoice	915962	139.00		139.00	
07/24/25		2025-07		Payment - Check		(139.00)	0.00	(139.00)	

AR HISTORY									
CURRENT	1-30 DAYS	31-60 DAYS	61-90 DAYS	91-120 DAYS	120+ DAYS	TOTAL			
0.00	0.00	0.00	0.00	0.00	0.00	0.00			
<input type="checkbox"/> Limit to open items	STATEMENT	INVOICE	AUTO APPLY	BALANCE WRITE OFF	WALLET (0)	Search			
DATE ↓	DUE DATE	PERIOD	SITE ID	TYPE	REFERENCE NO	AMOUNT	APPLIED AMOUNT	BALANCE	RUNNING SUM
07/31/25	08/20/25	2025-07		Invoice	915962	139.00	(139.00)		0.00
07/31/25	08/20/25	2025-07		Reversed Invoice	915961	0.00		(139.00)	(139.00)
07/24/25		2025-07		Payment - Check		(139.00)	139.00	(139.00)	(139.00)
07/22/25	08/11/25	2025-07		Reversed Invoice	915960	0.00			0.00

Pathway: Customer Service Screen (Accounts) > AR History

[75.1 Release] Work Orders (Accounts) - Unable to Save Disposal Ticket When LEED is Enabled on the Site (18978)

An issue has been resolved that prevented disposal tickets from being saved when LEED tracking was enabled for the site.

EDIT DISPOSAL / SHIPMENT
?
✕

WO Disposal - 10030718 INTERNAL TICKET # 41690

FACILITY CHAMBERS COUNTY LF	EXTERNAL TICKET #	STATUS Completed
TRANSPORT METHOD Truck	TRUCK	MATERIAL MSW

NOTES

Weights

WEIGHT IN	4500	pound	START	07/31/25 Thu	03 : 57 : 00 . 000 PI	QTY	1.25	ton	DISPOSAL RATE	55.0000
WEIGHT OUT	2000	pound	END		-- : -- : --				FEE 1	10.00
NET	2500	pound							FEE 2	20.00

EDIT SERVICE RECORD
?
✕

Site # 21638001 WORK ORDER 10030718 QTY 1 SERVICE CODE 35 Yard Compactor Service (34562) EQUIPMENT 35YD-CP WORK TYPE RO_DUMPRET ORDER TYPE On Call

Example Site
12345 Farm to Market 1960 Rd W
Houston, TX 77065
PHONE +1 888-555-2365

ORDER NOTES

CREATED BY Paul Gonzalez - QA Expert (Admin) on 7/31/25 3:57 pm

ORDER REASON

PO NUMBER EXTERNAL ID

SCHEDULED DATE 07/31/25 Thursday ROUTE SEQUENCE 0 DESTINATION / ORIGIN

WORK STATUS Scheduled EXCEPTION REASON POSTING STATUS Pending

ACCESS

Charges \$ 500.00 2 Source Location Disposal / Ship 1 Payments Completion Attachments Labels Photos

START DATE/TIME	END DATE/TIME	FACILITY	VEHICLE INFO	TANK	TICKET #	QUANTITY	MATERIAL	TOTAL COST
Thu Jul 31, 2025 3:57 pm		CHAMBERS COUNTY...			41690	1.25 tons	MSW	\$ 1,385.20 1 -

Pathway: Customer Service Screen > [select] Work Order

[75.1 Release] Service Records (Accounts) - Driver Notes for Exceptions Not Visible on Work Order (19012)

An issue has been resolved where notes entered by the driver in NavuNav for stops marked with an Exception were not displaying in the Completion/Exception Notes field of the Service Record.

EDIT SERVICE RECORD
?
✕

	WORK ORDER	QTY	SERVICE CODE	EQUIPMENT	WORK TYPE	ORDER TYPE	MATERIAL
Site # 49433001 Subway 402 N Cascade St Osceola, WI 54020 PHONE CREATED BY Aliena Somers - Admin-NS (Sales) on 6/30/25 7:52 pm ORDER REASON	9888676	1	2 Yard Trash Service (38995)	2YD	FL_SERVICE	Scheduled Service	MSW

ORDER NOTES

PO NUMBER

EXTERNAL ID

SCHEDULED DATE

07/30/25 Wednesday

ROUTE

LA405

SEQUENCE

0

DESTINATION / ORIGIN

Originally scheduled **Tuesday 7/29/25** rescheduled by Paul Gonzalez - QA Expert (Admin) on 7/30/25 10:54 am

WORK STATUS

Not Serviced

EXCEPTION REASON

Bin Blocked

POSTING STATUS

Pending

[Update History](#) Paul Gonzalez - QA Expert (Admin) c

Charges
Payments
Completion
Lab Tests
Attachments
Labels
Photos 1
Timeline

START [Click to Set](#) Stop was never set to IN PROGRESS

END [07/30/25 10:57 am](#) Paul Gonzalez - QA Expert (Admin) setting status to NOT SERVICED

No Driver Signature / No Customer Signature

COMPLETION/EXCEPTION NOTES

Bin Blocked 2025-07-30 10:57:05. Paul Gonzalez - blocked by Ferrari license plate 46

COLOR-D TEST(IF APPLICABLE)

COMBUSTIBLE GAS/HALOGEN SCREENING

Failed, Sample Taken

REVENUE	SURCHARGE REVENUE	TOTAL REVENUE
\$ 2.50	\$ 0.25	\$ 2.50

Select Print Format 🖨️

ADD PAYMENT (F7)

SAVE (F2)

[75.1 Release] Service Records (Accounts) - Update to Timeline Tab (16498)

The Timeline tab for Service Records is now available for work orders with a status of "In Progress." Previously, it was only available for work orders with a status of "Not Serviced" or "Completed."

EDIT SERVICE RECORD

Site #	WORK ORDER	QTY	SERVICE CODE	EQUIPMENT	WORK TYPE	ORDER TYPE	MATERIAL
49266001	9884861	3	3 Yard Trash Service (38633)	3YD	FL_SERVICE	Scheduled Service	MSW

Routing Test 1
 6253 Hollywood Blvd
 Los Angeles, CA 90028-8275
 CREATED BY
 Paul Gonzalez - QA Expert (Admin) on
 6/30/25 3:55 am
 ORDER REASON

ORDER NOTES

PO NUMBER _____ EXTERNAL ID _____
 SCHEDULED DATE: 08/14/25 Thursday ROUTE: LA 104 - Paul Gonzalez SEQUENCE: 0 DESTINATION / ORIGIN: _____
 WORK STATUS: In Progress EXCEPTION REASON: Bin Blocked POSTING STATUS: Pending
Update History - Aliena Somers - Admin-N5 (Sales) on

Charges | Payments | Completion | Lab Tests | Attachments | Labels | Photos | **Timeline**

Enable Geocode Update HIDE TRAVEL PATH

TIME ↑

Select Print Format ADD PAYMENT (F7) SAVE (F2)

Pathway: Customer Service Screen > Service Records {selection}

[75.1 Release] Site Service (Accounts) - Equipment Ownership Set to 'Company' Not Saving Correctly on Services (18295)

An issue has been resolved where selecting *Company* in the Equipment Ownership field did not save.

SERVICE ADDITIONAL FIELDS
?
✕

REASON CODE CHG-Price Increase

PO NUMBER

BLANKET PO 🔍

EQUIPMENT OWNERSHIP

DESTINATION/ORIGIN ✕

SERVICE NOTES
+

START DATE	END DATE	NOTE

SAVE

Pathway: Customer Service Screen > Active Services

[75.1 Release] Orders, Quotes and Contracts (Accounts) - Lost Proposal with Close Notes Over 30 Characters Could Not Be Opened (18270)

An issue has been resolved that prevented lost proposals with close notes longer than 30 characters from opening to view details.

EDIT DOCUMENT - PROPOSAL 4185

Settings Services ¹ History ¹ Attachment Master Agreement Term Addendums Surcharge Rates

ACCOUNT 49433 / Subway

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

REASON: Lost to Competitor | COMPETITOR: Waste Management | NOTE: n they are up for renewal in 2027 | DATE: [Calendar]

SALES REP: Aliena Somers - Admin-NS (S: | SOLD BY: | FORM CONTACT: | Linked Leads (0)

TITLE: | PO NUMBER: |

EFFECTIVE DATE: 08/19/2025 | DELIVERY DATE: 08/19/2025 | ESTIMATED CLOSE DATE: 08/19/2025 | CLOSE PROBABILITY: Medium

TERM: 12 Months

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

Pathway: Customer Service Screen > Orders, Quotes and Contracts

[75.1 Release] AR History (Accounts) - Invoice Link to View WO or Scale Ticket Returns Error (18138)

An issue has been resolved that caused the link to view a work order or scale ticket from an invoice to return an internal server error.

QA Dayton

Account Balance Due: \$ 85.73

Past Due: \$ 85.73

Make a payment

Login

WO # 9316965

914399

Site 49330001 - Testing - Flat Surcharge per Disposal Ton - 718 W 18th St Houston, TX 77008

QA Waste Services
Houston, TX 78426

Testing
Houston, TX 77008-0530

INVOICE # 914399
ACCOUNT # 49330
AMOUNT \$ 85.73
DATE Mar 7, 2025
DUE DATE Mar 22, 2025

Pay Online

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

Enclosed Check #
Amount

For proper credit return this portion

DATE	DESCRIPTION	WO#	PO #	QTY	RATE	TOTAL
03/07/25	MSW Disposal	9316965		1	\$ 50.00 per ton	50.00
03/07/25	Account Class Fee 1 - 914399			1		7.77
03/07/25	Account Class Fee 2 - 914399			1		8.88
03/07/25	Paper Bill Fee - Commercial - 914399			1		4.95
	Per Disposal Ton					10.00
	Tax					\$ 4.13
	Site Total					\$ 85.73

INVOICE TOTAL \$ 85.73

Pathway: Customer Service Screen > AR History

[75.1 Release] Service Records (Accounts) - Logic Updated to Site Service Recurring Minimum (17995)

If the site's bill group is set to **Anniversary** and the UOM for the selected Service Code is either **'Service'** or **'4 Week,'** the *Minimum Per 4 Week* field will appear on the Add and Update Active Service screen.

Setup Reference

[75.1 Release] AR History (Accounts) - Ability to Add and Edit PO Number on Invoice Details (17383) {New Feature}

Users with permission **480 (Edit PO Number on Invoice Detail)** can now add and edit a PO number to an invoice even after it has been generated. This enhancement helps ensure invoices meet customer requirements without the need to regenerate or adjust billing outside the system.

To enable this feature, edit each applicable role in Role Setup and change the permission from *New* to *Authorized*.

AR HISTORY						
CURRENT	1-30 DAYS	31-60 DAYS	61-90 DAYS	91-120 DAYS	120+ DAYS	TOTAL
0.00	192.38	0.00	0.00	0.00	0.00	192.38

DATE	DUE DATE	PERIOD	SITE ID	TYPE	REFERENCE NO	AMOUNT	APPLIED AMOUNT	BALANCE
07/31/25	08/20/25	2025-07	49315001	Invoice	915850	192.38		192.38

- View Details / Adjust Invoice
- Add Account Request
- Email
- Edit PO Number on Invoice Detail
- Print
- Reverse Invoice

SITE	WO#	DATE	DESCRIPTION	PO NUMBER	QTY	PER UNIT	TOTAL
Viebrock Associates (49315...	9861949	06/23/25	Bulk Pickup	1113	1.00	\$ 40.2365	\$ 40.24
Viebrock Associates (49315...		07/31/25	2 Yard Trash Service		1.00	\$ 23.00	\$ 5.75
Viebrock Associates (49315...		07/31/25	2 Yard Trash Service		1.00	\$ 23.00	\$ 23.00
Viebrock Associates (49315...		07/31/25	Trash Svc - 96 Gallon Cart	1234 - Service PO	1.00	\$ 25.00	\$ 23.39
Viebrock Associates (49315...		07/31/25	Trash Svc - 96 Gallon Cart	1234 - Service PO	1.00	\$ 25.00	\$ 25.00
Viebrock Associates (49315...		07/31/25	Trash Svc - 96 Gallon Cart	1234 - Service PO	1.00	\$ 25.00	\$ 25.00
Viebrock Associates (49315...		07/31/25	Trash Svc - 96 Gallon Cart	1234 - Service PO	1.00	\$ 25.00	\$ 25.00
Viebrock Associates (49315...		07/31/25	Trash Svc - 96 Gallon Cart	1234 - Service PO	1.00	\$ 25.00	\$ 25.00

Pathway: Accounts > AR History

[75.1 Release] Service Records (Accounts) - Logic Updated to Site Service Recurring Minimum (17995)

If the site's bill group is set to *Anniversary* and the UOM for the selected Service Code is either 'Service' or '4 Week,' the *Minimum Per 4 Week* field will appear on the Add and Update Active Service screen.

ADD ACTIVE SERVICE									
REASON CODE	ADD-New Business	COMPETITOR		START DATE	09/08/25 Monday	Week 37 (B)			
QTY	EQUIPMENT	SERVICE CODE	FREQUENCY	PER UNIT	SERVICE FEES	MINIMUM PER 4 WEEK			
1	2 Yard FL	Yard Service UOM Minimum	On Call	65.0000	65.00 service	260.00			
REQUESTED BY	[Text Field]								
SERVICE NOTES	[Text Area]								
SERVICE CHARGES	RATE	UOM	NO CHARGE QTY	EST QTY	MINIMUM TYPE	MINIMUM	MAX WEIGHT	OVER MAX WEIGHT RATE	WORK TYPES

Setup Reference

The screenshot displays a software interface for account management. At the top, account details for 'Subway' (49433) are shown, including address (1234 N Cascade St, Osceola, WI 512340), phone number (+1 555-555-4461), terms (Net 20), and invoice delivery (Printed). The account is active, with a current balance of 34.75. A table of service codes is visible, with columns for 1-30, 31-60, 61-90, 91-120, and 120+.

An 'UPDATE SERVICE CODE' modal window is open, showing a form for editing service code 'FL02SVCM'. The form includes fields for Name, Line of Business, Equipment Type, Material Type, UOM (set to 'service'), Taxable status, GL Account, Temporary Service GL Account, Proration Method, and Vacation Hold Proration Method. On the right side, there are several 'ENABLE' checkboxes, with 'ENABLE RECURRING MINIMUM' set to 'Yes'.

QTY	SERVICE CODE
1	2 Yard Trash Service
1	6 Yard Trash Service

[75.1 Release] AR History (Accounts) - Ability to Add and Edit PO Number on Invoice Details (17383) {New Feature}

Users with permission **480 (Edit PO Number on Invoice Detail)** can now add and edit a PO number to an invoice even after it has been generated. This enhancement helps ensure invoices meet customer requirements without the need to regenerate or adjust billing outside the system.

To enable this feature, edit each applicable role in Role Setup and change the permission from *New* to *Authorized*.

The image shows two screenshots from a software application. The top screenshot is the 'AR HISTORY' screen, which displays a summary table of account receivable balances by age group and a list of invoices. A context menu is open over the first invoice, showing options like 'View Details / Adjust Invoice', 'Add Account Request', 'Email', 'Edit PO Number on Invoice Detail', 'Print', and 'Reverse Invoice'. The bottom screenshot is the 'EDIT PO NUMBER ON INVOICE 915850' screen, which shows a detailed list of invoice items with columns for SITE, WO#, DATE, DESCRIPTION, PO NUMBER, QTY, PER UNIT, and TOTAL.

AR HISTORY Summary Table:

CURRENT	1-30 DAYS	31-60 DAYS	61-90 DAYS	91-120 DAYS	120+ DAYS	TOTAL
0.00	192.38	0.00	0.00	0.00	0.00	192.38

AR History Table:

DATE	DUE DATE	PERIOD	SITE ID	TYPE	REFERENCE NO	AMOUNT	APPLIED AMOUNT	BALANCE
07/31/25	08/20/25	2025-07	49315001	Invoice	915850	192.38		192.38

Edit PO Number on Invoice 915850 Table:

SITE	WO#	DATE	DESCRIPTION	PO NUMBER	QTY	PER UNIT	TOTAL
Viebrock Associates (49315...	9861949	06/23/25	Bulk Pickup	1113	1.00	\$ 40.2365	\$ 40.24
Viebrock Associates (49315...		07/31/25	2 Yard Trash Service		1.00	\$ 23.00	\$ 5.75
Viebrock Associates (49315...		07/31/25	2 Yard Trash Service		1.00	\$ 23.00	\$ 23.00
Viebrock Associates (49315...		07/31/25	Trash Svc - 96 Gallon Cart	1234 - Service PO	1.00	\$ 25.00	\$ 23.39
Viebrock Associates (49315...		07/31/25	Trash Svc - 96 Gallon Cart	1234 - Service PO	1.00	\$ 25.00	\$ 25.00
Viebrock Associates (49315...		07/31/25	Trash Svc - 96 Gallon Cart	1234 - Service PO	1.00	\$ 25.00	\$ 25.00
Viebrock Associates (49315...		07/31/25	Trash Svc - 96 Gallon Cart	1234 - Service PO	1.00	\$ 25.00	\$ 25.00
Viebrock Associates (49315...		07/31/25	Trash Svc - 96 Gallon Cart	1234 - Service PO	1.00	\$ 25.00	\$ 25.00

Pathway: Accounts > AR History

[75.1 Release] AR History (Accounts) - Addition of Service Minimum on Invoices (18725)

If a service has an applicable recurring minimum charge, it will display as a separate line item when not included in a charge grouping on the following:

- Printed Invoice
- Estimate Invoice
- Invoice Detail



NavuSoft, Inc
 Legal - ADDR2
 Santa Monica, CA 90401-3126

INVOICE # 923294
ACCOUNT # 49455
AMOUNT \$ 1,000.00
DATE Jul 31, 2025
DUE DATE Aug 10, 2025

Pay Online
 navuqa-customerportal.navusoft.net login or
 use **QUICK PAY CODE** AA5E9

Minimum Billing

Rosemead, CA 91770-1685

Pay By Check

Remit - ADDR2
 Beverly Hills, CA 90210

Enclosed Check # _____

Amount _____

For proper credit return this portion

Site 49455001 - Minimum Billing - 8518 Valley Blvd Rosemead, CA 91770						
DATE	DESCRIPTION	Work Order #	PO #	QTY	RATE	TOTAL
07/01/25 - 07/31/25	30 YD Open Top Minimum Charge			1	\$ 0.00 per month	800.00
07/24/25	Roll Off Haul	9996993		1	\$ 200.00 each	200.00
Site Total						\$ 1,000.00

INVOICE TOTAL \$ 1,000.00

Current	1-30 Days	31-60 Days	61-90 Days	Over 90 Days	Total Due
1,000.00	0.00	0.00	0.00	0.00	1,000.00

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

Thank You for your business!

Sales

Rate Update Batch (Sales) - Enhancements and Additions to Screen and Batch Creation (18480)

The following enhancements have been made to the Rate Update batch screen:

Rate Update Batch (Main Screen)

- Removal of Columns:
 - Division
 - Service Region
 - Line of Business
- Addition of Columns:
 - Filter
 - Net Variance
- Updated Columns
 - Created Date / Created User

ID	FILTER	TYPE	CREATED DATE/ CREATED USER	EFFECTIVE DATE	STATUS	POSTED DATE/ POSTED USER	INC / EXC	NOTE	NET VARIANCE
1001	1. Site Division in (DAYTON) 2. Service Region in (OAKS OF ATASCOGITA) 3. Line of Business in (Residential)	Service	08/06/21 6:57 pm John Smith - IT & Reporti...	09/01/21	Posted	08/06/21 6:59 pm John Smith - IT & Reporti...	0 / 821		
1002	1. Site Division in (HOUSTON) 2. Service Region in (PEARLAND MUNICIPAL) 3. Line of Business in (Commercial)	Service	10/27/21 10:40 am John Smith - IT & Reporti...	10/01/21	Posted	10/27/21 10:44 am John Smith - IT & Reporti...	0 / 0	All City of Pearland services are no charge	
1003	1. Site Division in (DAYTON) 2. Line of Business in (Commercial)	Service	12/31/21 9:34 am Bill Jones - VP (Operations)	01/01/22	Posted	12/31/21 9:52 am Bill Jones - VP (Operations)	0 / 0	Annual City of Liberty increase, see letter BK	
1004	1. Site Division in (CORPUS) 2. Service Region in (CORPUS OPEN MARKET) 3. Line of Business in (Roll Off)	Svc. Charge	01/03/22 10:29 am Bill Jones - VP (Operations)	01/01/22	Posted	01/03/22 10:36 am Bill Jones - VP (Operations)	0 / 0	CEFE Valencuela 1/1/22 rate increase as notified	
1005	1. Site Division in (DAYTON)	Service	02/28/22 2:58 pm Bill Jones - VP (Operations)	04/01/22	Voided		13460 / 0	Forgot to add billgroup filter	
1006	1. Site Division in (DAYTON)	Service	02/28/22 3:01 pm Bill Jones - VP (Operations)	04/01/22	Posted	03/07/22 11:37 am John Smith - IT & Reporti...	0 / 0	PI Effective 4/1/2022	
1007	1. Site Division in (DAYTON) 2. Service Region in (OAKS OF ATASCOGITA)	Service	05/06/22 12:15 pm Bill Jones - VP (Operations)	06/01/22	Posted	05/06/22 12:21 pm Bill Jones - VP (Operations)	0 / 0	Contractually allowed via 2019 agreement signed. BK	
1008	1. Site Division in (DAYTON)	Service	06/29/22 5:03 pm Barbara Jones - Office Ma...	07/01/22	Posted	07/05/22 5:43 pm David Navarro - Admin-N...	0 / 0	PRICE DECREASE 25.00 PER NEW CONTRACT	
1009	1. Site Division in (DAYTON) 2. Service Region in (KINGWOOD GREENS)	Service	07/27/22 9:25 am John Smith - IT & Reporti...	07/01/22	Voided		400 / 0	VOIDED-Have to implement by Bill Group	
1010	1. Site Division in (DAYTON) 2. Service Region in (KINGWOOD GREENS)	Service	07/27/22 1:31 pm John Smith - IT & Reporti...	07/01/22	Posted	07/27/22 1:37 pm John Smith - IT & Reporti...	0 / 0	Decreased individual rate, billing HOK for the difference.	
1011	1. Site Division in (DAYTON)	Service	08/13/22 9:40 am John Smith - IT & Reporti...	07/01/22	Voided		0 / 663	Failed to Exclude Other Cities	
1012	1. Site Division in (DAYTON)	Service	08/13/22 11:58 am John Smith - IT & Reporti...	07/01/22	Posted	08/13/22 12:07 pm John Smith - IT & Reporti...	0 / 0	Dayton PI-10% Effective 7/1/22	

Create a New Batch

Both batch creation options require using the "Add Filter" feature to narrow the batch to a specific set of sites. While this filter functions similarly to the Database Query filter, it does not support grouping conditions with AND/OR logic.

Reverse a Batch

An option to reverse a batch has been added, along with the following logic to prevent a reversal in certain cases:

- The service change has a work order marked as "Completed" or "Posted."
- The service has already been billed.
- The service has been edited since the batch was created.
- The service has a future-dated change.

The Reverse button is only displayed when the batch is in a **Posted** status.

SITE ID	SITE NAME	CITY	SERVICE ID	SERVICE CODE	CURRENT RATE	NEW RATE	VARIANCE	CURRENT W/O MINIMUM
43178052	HBB BLOCK	PEARLAND	21142	2 Yard Trash Service	\$ 68.12			
Rate update was reversed								
43178057	BURLINGTON COAT FACTORY	PEARLAND	21147	8 Yard Trash Service	\$ 331.25			
Rate update was reversed								
43178023	KRISPY KREME	PEARLAND	26991	Enclosure	\$ 38.97			
Rate update was reversed								
43178060	JIFFY LUBE 2781 PEARLAND	PEARLAND	21150	6 Yard Trash Service	\$ 196.23			
Rate update was reversed								
43178042	JIFFY LUBE 899 PEARLAND	PEARLAND	21133	6 Yard Trash Service	\$ 119.08			
Rate update was reversed								

Total Count Updates

The total count has been moved to display at the top of the grid, whereas it was previously shown below it.

SITE ID	SITE NAME	CITY	SERVICE ID	CHARGE CODE
<input checked="" type="checkbox"/>	32875007 TX DOT - GOLIAD	Goliad	33650	Roll Off Haul
<input checked="" type="checkbox"/>	32875010 TX DOT - REFUGIO	REFUGIO	33656	Roll Off Haul

Pathway: Sales > Rate Update Batches

Surcharge Management (Sales) - Added Ability to Export/Import Multiple Surcharge Rate Changes (18345)

The following updates were applied to the Surcharge Management screen:

- Import functionality has been added with support for CSV file format. The file must include the required columns listed below; the import will fail if any are missing, except for the optional "Note" column.
 - Account ID
 - Site ID
 - Surcharge ID
 - Override Level
 - Current Rate
 - Effective Date (mm/dd/yyyy format)
 - Note (optional)
- An Override Level column has been added. If a rate hasn't been overridden the column is blank.
 - In the import file,
 - if "Site" is entered as the Override Level, the surcharge override applies only to that specific site.
 - if "Account" is entered, the override applies to all sites associated with the account.
- Surcharge Management has been relocated to the Sales module. Previously, it was located in the Accounting module.

ACCOUNT	SITE	SITE STATUS	SALES REP	SURCHARGE GROUP	SURCHARGE	TYPE	BASE RATE	CURRENT RATE	OVERRIDE LEVEL	EFFECTIVE DATE	ESTIMATED REVENUE				
											RECURRING	BASE RATE	CURRENT RATE	VARIANCE	
TOTALS											\$	\$ 1,326.83	\$ 64.63	\$ 63.07	\$ (1.56)
BJ'S RESTAURANT 431191	BJ'S Restaurant 431191002	Active	Aliena Somers	Pearland Franchise Fee	Pearland Franchise Fee	Percentage %	1.2%		Account	11/01/2023	\$ 194.25	\$ 0.00	\$ 2.33	\$ 2.33	
Trader Joe's 48986	Trader Joe's 48986001	Active	House Account	Fuel Surcharge - Commercial	Fuel Surcharge - Commercial	Percentage %	5%	2%	Site	03/01/2024	\$ 630.00	\$ 31.50	\$ 12.60	\$(18.90)	
G.I. Food Wholesale Inc 49378	G.I. Food Wholesale Inc 49378001	Active	Aliena Somers	Fuel Surcharge - Commercial	Fuel Surcharge - Commercial	Percentage %	5%	10%	Site	04/01/2025	\$ 400.00	\$ 20.00	\$ 40.00	\$ 20.00	
mandarin coffee stand 49396	mandarin coffee stand 49396001	Active	Aliena Somers	Fuel Surcharge - Commercial	Fuel Surcharge - Commercial	Percentage %	5%	3.5%	Account	04/01/2025	\$ 102.58	\$ 5.13	\$ 3.59	\$(1.54)	
Whata Peach 49390	Whata Peach 49390001	Active	Aliena Somers	Flat Fee	FLATFEE	Flat	\$ 8.00	\$ 4.55	Account	04/01/2025	\$ 8.00	\$ 4.55	\$ 4.55	\$(3.45)	

Pathway: Sales > Surcharge Management

Operation

Route Management (Operations) - Service Region Filter Relocated (18115)

The Service Region filter has been relocated to an optional side screen filter, enabling additional filtering after the results have loaded.

Pending Current Re-Number										
HOUSTON		Commercial	HOU 201, HOU 202, F		Monday, Tuesday	LOAD	EXPORT	IMPORT		
<input type="checkbox"/> EDIT <input type="checkbox"/> MAP		Route Summary	<input checked="" type="checkbox"/> Reset Sequence to 0 on Reroute / Reschedule		FILTERS: SERVICE REGION OUSTON OPEN MARKET		SERVICE CODE	6 Yard Trash Service, 4 Y		Search
QTY	SITE	SERVICE CODE	FREQ / NEXT SVC	ROUTE	SEQ ↑	DOW	NEW ROUTE	NEW SEQ	NEW START DATE	
1	48980001 Crave 6509 W Little York Rd Houston, TX 77040-4801	2 Yard Recycle Service 2 Yard FL Recycle	2x per week 03/18/25 Week 12	HOU 201	0	Tue				
1	49056001 Traveler's Table Site 520 Westheimer Rd Houston, TX 77006-2932	3 Yard Trash Service 3 Yard FL MSW	3x per week 03/24/25 Week 13	HOU 201	2	Mon				
1	45319001 Willies #2022 2800 Smith Ranch Rd Pearland, TX 77584-5225	8 Yard Trash Service 8 Yard FL MSW	4x per week 03/24/25 Week 13	HOU 201	4	Mon				
1	47064001 URBAN MERIDIAN 15999 South Post Oak Road Houston, TX 77053-3553	8 Yard Trash Service 8 Yard FL MSW	2x per week 03/24/25 Week 13	HOU 201	5	Mon				
2	45170016 FIVE BELOW 3113 Silverlake Village Dr Pearland, TX 77584	8 Yard Recycle Service 8 Yard FL Recycle	2x per week 03/24/25 Week 13	HOU 205R	0	Mon				
1	46242001	8 Yard Recycle Service	2x per week	HOU 205R	0	Mon				

Pathway: *Operations > Route Management > Current [tab]*

Inbound/Outbound (Operations) - Support for Multiple Profiles and Materials (18030)

The following changes have been made to support multiple profiles and materials:

Modifications to Work Type Setup

Pathway: *Setup > Operations > Work*

Type

In Work Type Setup, the following changes were made:

1. 'Enable Load Material Composition' has been renamed to '**Load Material Composition**'.
2. The 'Yes' option for Load Material Composition has been renamed to '**Enable Multiple Materials**' and a new option '**Enable Multiple Profiles and Materials**' was added.

The screenshot shows the 'UPDATE WORK TYPE' window with the 'NavuNav Settings' tab selected. The work type is 'INBOUNDLD'. The settings are as follows:

Field	Value
ID	INBOUNDLD
NAME	Inbound Load
SELF-SERVICE LABEL	
LINE OF BUSINESS	Inbound and Outbound
INVENTORY MOVE TYPE	None
ACTION CATEGORY	Inbound / Receiving
MANIFEST NOTIFICATION TEMPLATE	
CREATE ONE SERVICE RECORD PER QUANTITY	No
ENABLE DISPOSAL ENTRY	Yes
ENABLE CONSOLIDATION BATCH LINK	No
PRODUCTIVITY UNITS	1.00
DESTRUCTION DATE TRACKING	Disabled
Inbound / Outbound	
POST WORK ORDER WHEN COMPLETED	No
ENABLE WEIGHT ADJUSTMENT	No
TRACK INBOUND SOURCE / ORIGIN	No
LOAD MATERIAL COMPOSITION	Enable Multiple Materials
Route Optimization	
ORDER BASELINE SECONDS	Enable Multiple Profiles and Materials
DEFAULT SECONDS PER UNIT	0

Edit Service Record Modifications

Pathway: Search > Work Order

The following changes have been made to the Materials tab:

1. 'Disposal Record ID' column was removed
2. A 'Material Type' grid has been added, displaying the material type and percentage. If the work type has 'Enable Multiple Profiles and Materials' enabled, users can add multiple material types.
3. Addition of **Profile** and **Origin** selection columns if the work type has 'Enable Multiple Profiles and Materials' enabled.

Modifications to Inbound/Outbound and History Grids

Pathway: *Operations > Inbound/Outbound*

The following modification was made to the Inbound, Outbound and History tab grids:

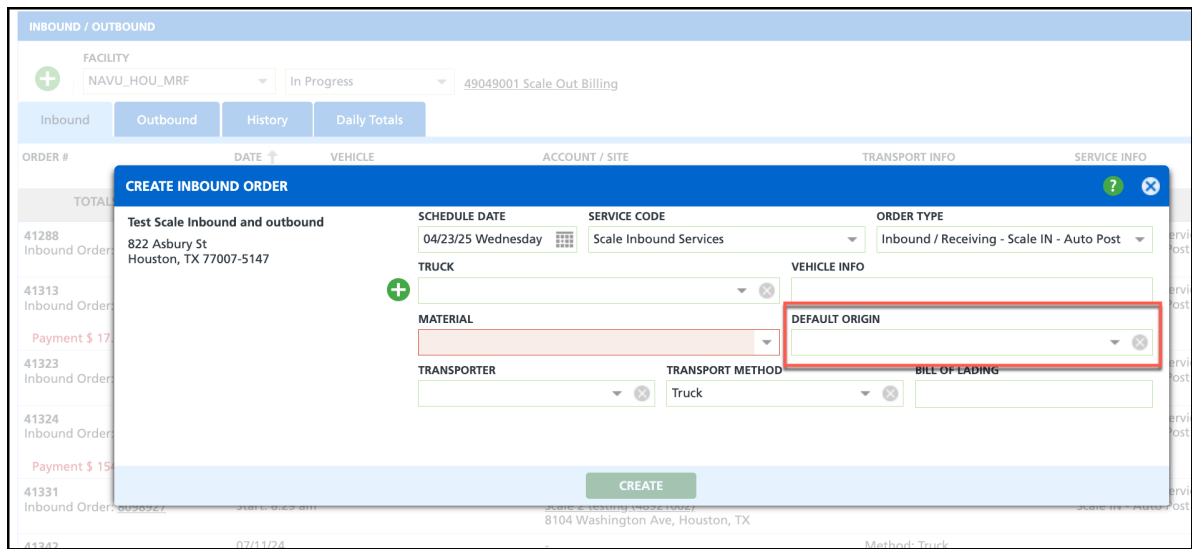
1. The Materials tab data is summarized in the Materials/Adjustments column.
 - o On the Outbound tab, only the material is listed, as outbound order types do not include a Materials tab.

Inbound / Outbound (Operations) - Default Origin Field Added to 'Create Inbound Order' (18307)

A **Default Origin** dropdown has been added to the **Create Inbound Order** screen to streamline capturing the material origin, when the **Require Source Location** setting in **Work Type Setup** is set to either *Require Material Origin* or *Optional Material Origin*. Upon save, the origin's record is set to 100%, and any changes can be made in the Origins tab within the service record.

The drop down will display only origins that meet the following criteria:

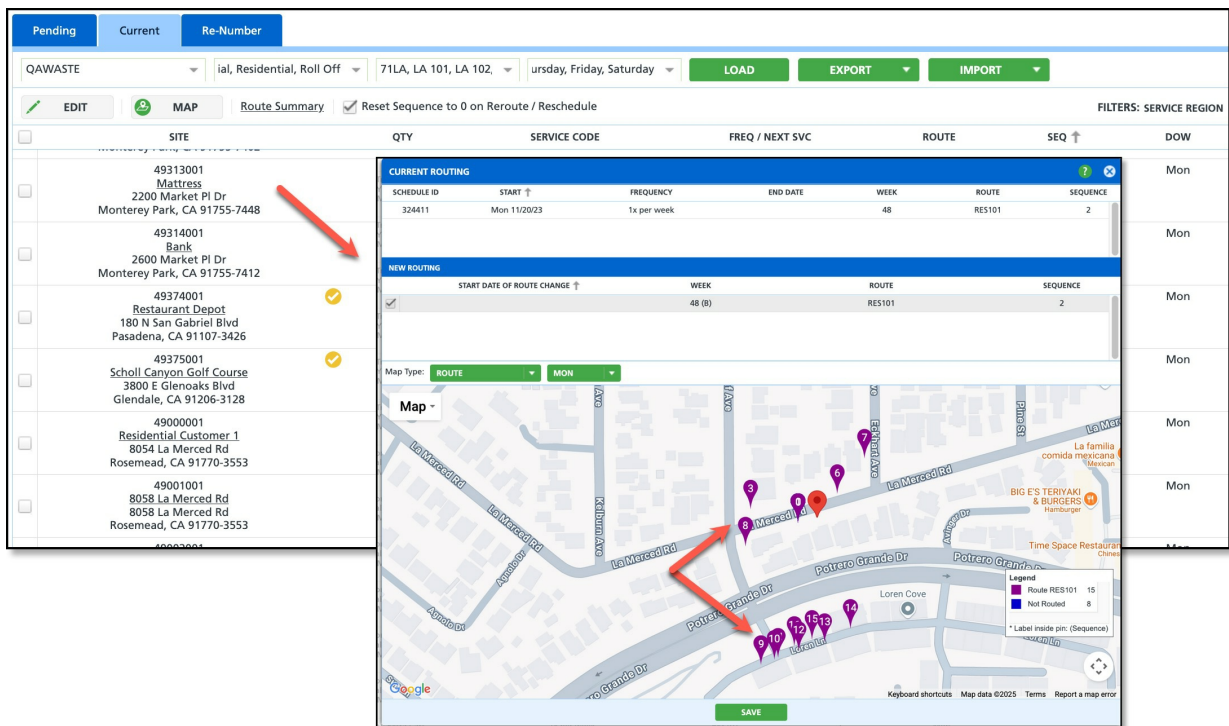
- The origin is marked as **Active**
- The origin has no designated division (division is **null**)
- The origin's division is the same division as the selected **disposal location** (facility).



Pathway: *Operations > Inbound / Outbound*

Route Management (Operations) - Logic Updated to Nearby Pins on Map (18352)

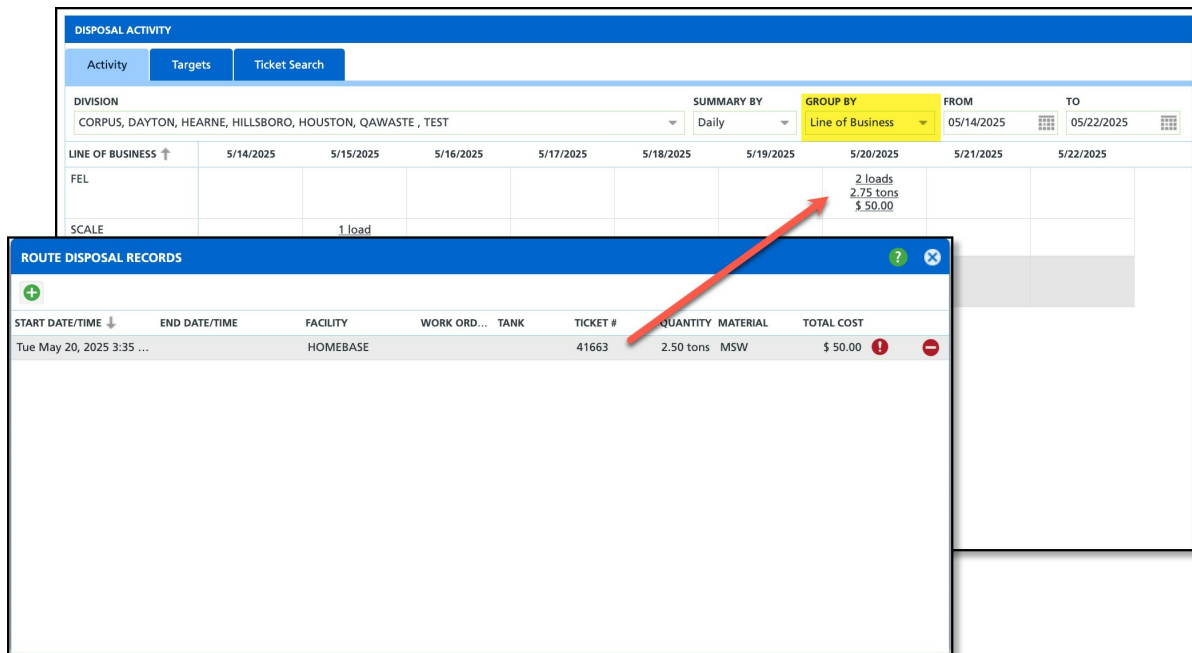
On the **Current** tab in Route Management, double-clicking a site to display its location on the map previously failed to show nearby location pins. This has been resolved.



Pathway: *Operations > Route Management - Current [tab]*

Disposal Activity (Operations) - Logic Updated for Disposal Records and LOB Assignment (18146)

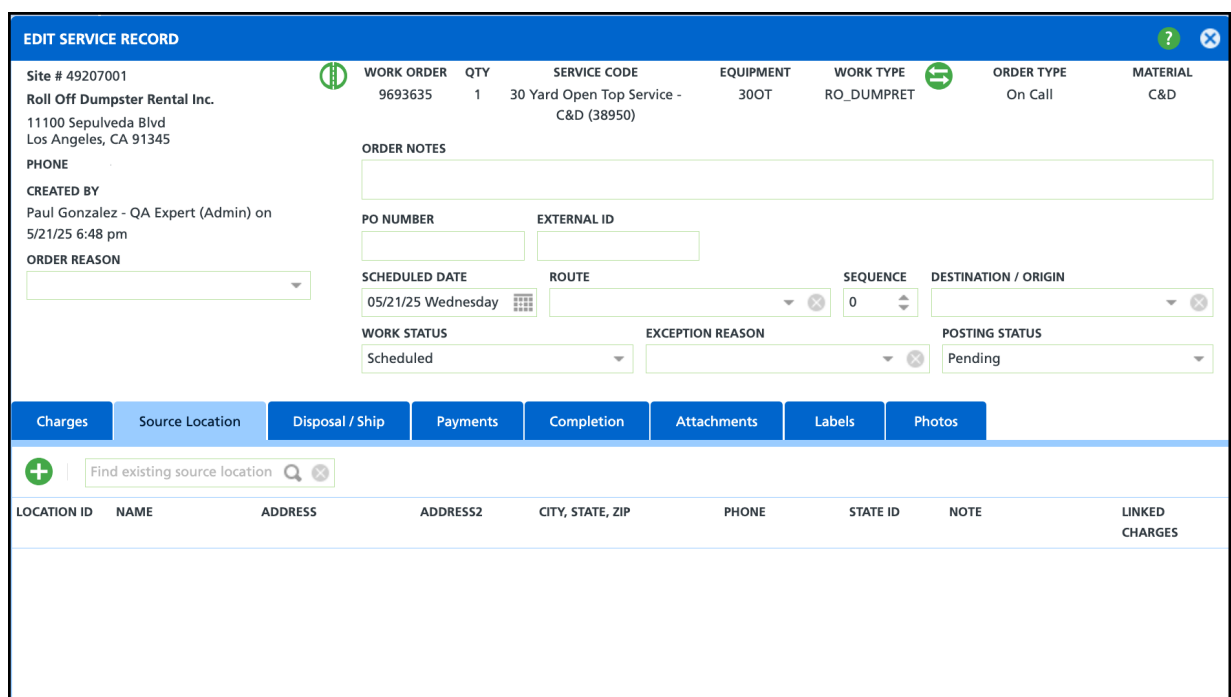
An issue has been resolved where disposal records entered for a route were not appearing in the **Disposal Activity** screen under the **Line of Business (LOB)** assigned to that route.



Pathway: *Operations > Disposal Activity*

Service Records (Accounts) - Display of Service ID (18508)

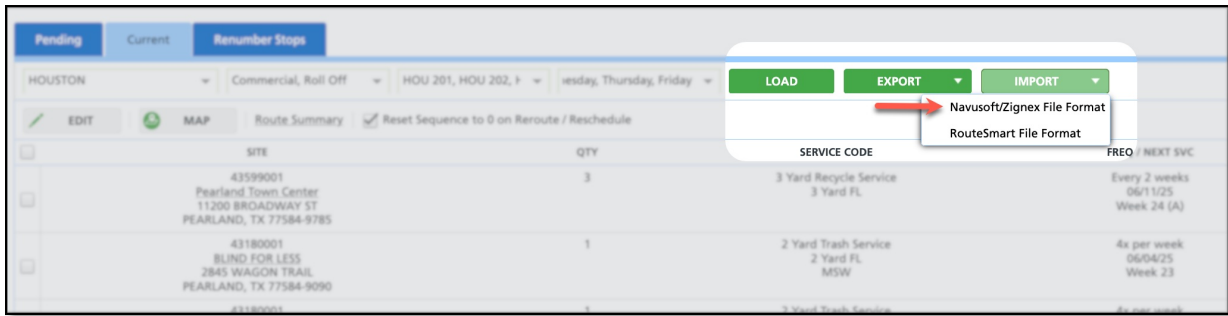
The logic for the Service Record has been updated to ensure the full Service ID is displayed alongside service codes with longer names. Previously, the Service ID was not shown when the service name was too long.



Pathway: *Search > Work Order*

Route Management (Operations) - Import/Export File Format Renamed (18595)

In the Route Management (Current) tab, the "Navusoft File Format" option for both Export and Import has been renamed to "Navusoft/Zignex File Format."



Pathway: *Operations > Route Management > Current [tab]*

Article: [Export and Import - Route Management](#)

Route Summary (Route Management) - 'Avg Hours' Summary Type Removed (18769)

In Route Summary, the 'Avg Hours' Summary Type has been removed and will be delivered on a different form on a future release.

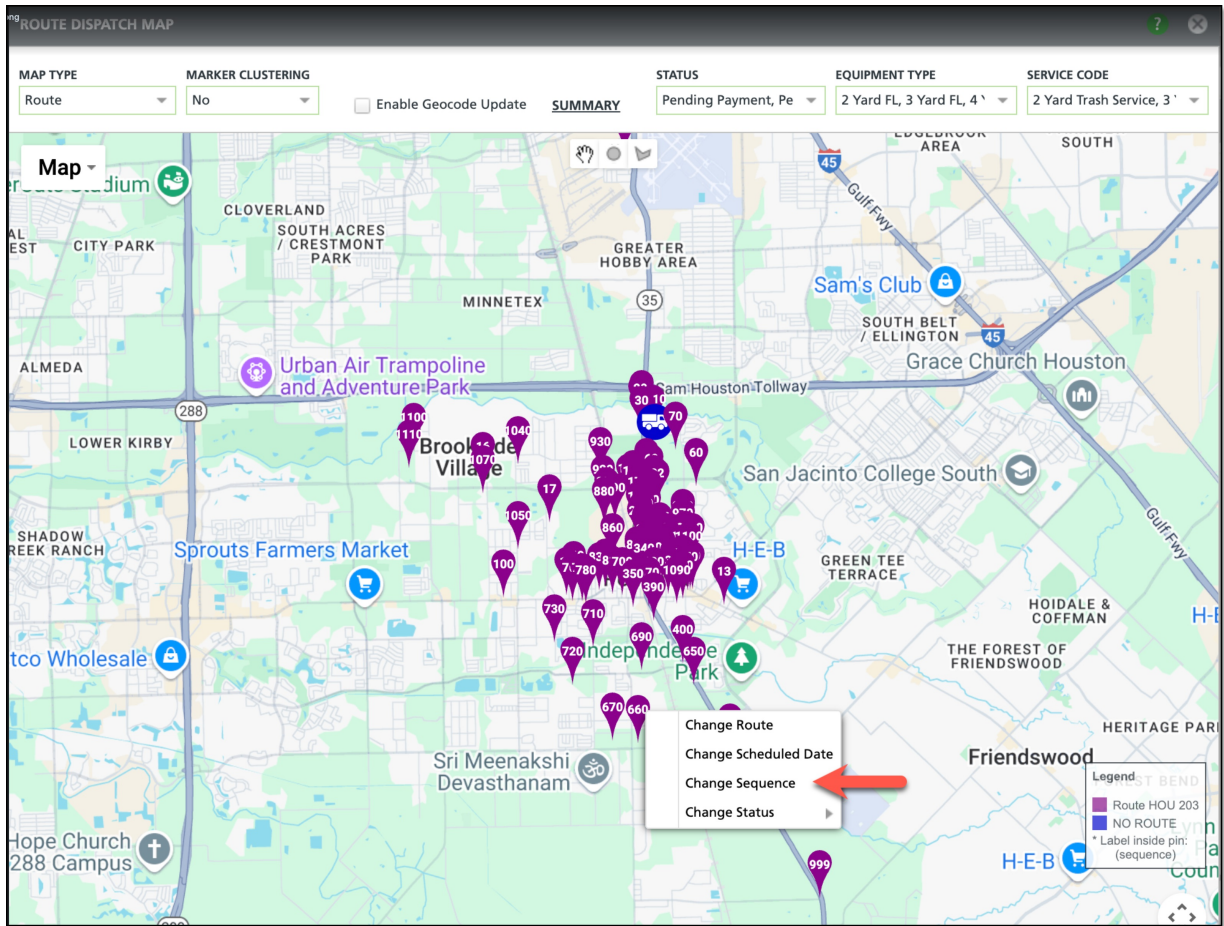
ROUTE SUMMARY						
SUMMARY TYPE	Avg Hours					
ROUTE	MONDAY		TUESDAY		WEDNESDAY	
	CURRENT	NEW	CURRENT	NEW	CURRENT	NEW
HOU 404	0	0	0	0	0	0
HOU 410	0	0	0	0	0	0
HOU 108	0	0	0	0	0	0
HOU 602	0	0	0	0	0	0
HOU 205R	0	0	0	0	0	0

Pathway: *Operations > Route Management*

Route Management (Operations) - Import/Export File Format Renamed (18595)

Dispatch (Operations) - Change Sequence Re-Added to Map (18065)

Change Sequence has been re-added as a right-click menu option to the Route Dispatch Map.



Pathway: Operations > Dispatch

Dispatch (Operations) - Error Received When Trying to Post Larger Routes (18103)

An issue has been resolved that triggered an error when users attempted to bulk post a high volume of service records in the Dispatch screen.

ROUTE	SEQ	ORDER NOTE	SITE	SCHEDULED DATE	CREATED ON	WO#	WO TYPE	SERVICE TYPE	QTY	EQUIPMENT	PHOTOS
DAY 104			45678001 * SRALES Houston	Thu 7/17/25	6/2/25 3:55am	9746253 *	Scheduled Service COMPLETED	RS Service	1		
DAY 104			Glen Ln,	Thu 7/17/25	6/2/25 3:55am	9746428	Scheduled Service COMPLETED	RS Service	1		
DAY 104			3202 Birch Park Ln, Houston	Thu 7/17/25	6/2/25 3:55am	9746674 *	Scheduled Service COMPLETED	RS Service	1		
DAY 104			46507001 * CHRISTOPHER J HAGEMAN	Thu 7/17/25	6/2/25 3:55am	9747441	Scheduled Service COMPLETED	RS Service	1		
DAY 104			46628001 * CHRIS MCNAUGHTON	Thu 7/17/25	6/2/25 3:55am	9747446	Scheduled Service COMPLETED	RS Service	1		
DAY 104			46988001 * Aris Gutierrez	Thu 7/17/25	6/2/25 3:55am	9747554	Scheduled Service COMPLETED	RS Service	1		
DAY 104			27243001 * SAILOR PAMELA	Thu 7/17/25	6/2/25 3:55am	9747556	Scheduled Service COMPLETED	RS Service	1		
DAY 104			31437001 * RUIZ VALERIE	Thu 7/17/25	6/2/25 3:55am	9747632	Scheduled Service COMPLETED	RS Service	1		
DAY 104			47962001 Janae and Olivia Villalobos	Thu 7/17/25	6/2/25 3:55am	9747684	Scheduled Service COMPLETED	RS Service	1		

Pathway: *Operations > Dispatch > Services List*

Dispatch (Operations) - Ability to View and Manage Engine Hours (18344) [New Feature]

Engine hour tracking has been added to the following screens:

Dispatch and Truck Productivity

In Dispatch, an **Engine Hours** column has been added as a hyperlink that opens the Truck Productivity screen (formerly Truck Odometer). Within the Truck Productivity screen, **Start Engine Hours** and **End Engine Hours** columns have been added, both of which are editable.

The screenshot shows the 'DISPATCH' interface with a modal window titled 'TRUCK PRODUCTIVITY - LA 101 - FRIDAY, 7/18/25'. The modal contains a table with the following data:

TRUCK	DRIVER	STATE / PROVINCE	START TIME	START ODOMETER	START ENGINE HOURS	END TIME	END ODOMETER	END ENGINE HOURS
3002	Alliena Somers - Ad...	Minnesota	10:26 AM	53,900.00	1,002.00	10:32 AM	54,000.00	1,010.00
3002	Alliena Somers - Ad...		10:32 AM	54,000.00	1,010.00	2:42 PM	54,168.00	1,019.00
3002	Alliena Somers - Ad...		2:53 PM	54,168.00	1,019.00		54,268.00	1,028.00

The background interface shows a summary table with columns: ROUTE, DRIVER, PAYROLL, LOG IN, PRE TRIP, FIRST SERVICE TIME, LUNCH START, LUNCH END, LAST SERVICE TIME, TRUCK (DISTANCE), FUEL, POST TRIP, LOG OUT, PAYROLL, DOWNTIME, ENGINE HOURS, and LABOR HOURS. A red arrow points from the 'ENGINE HOURS' column in the background to the modal window.

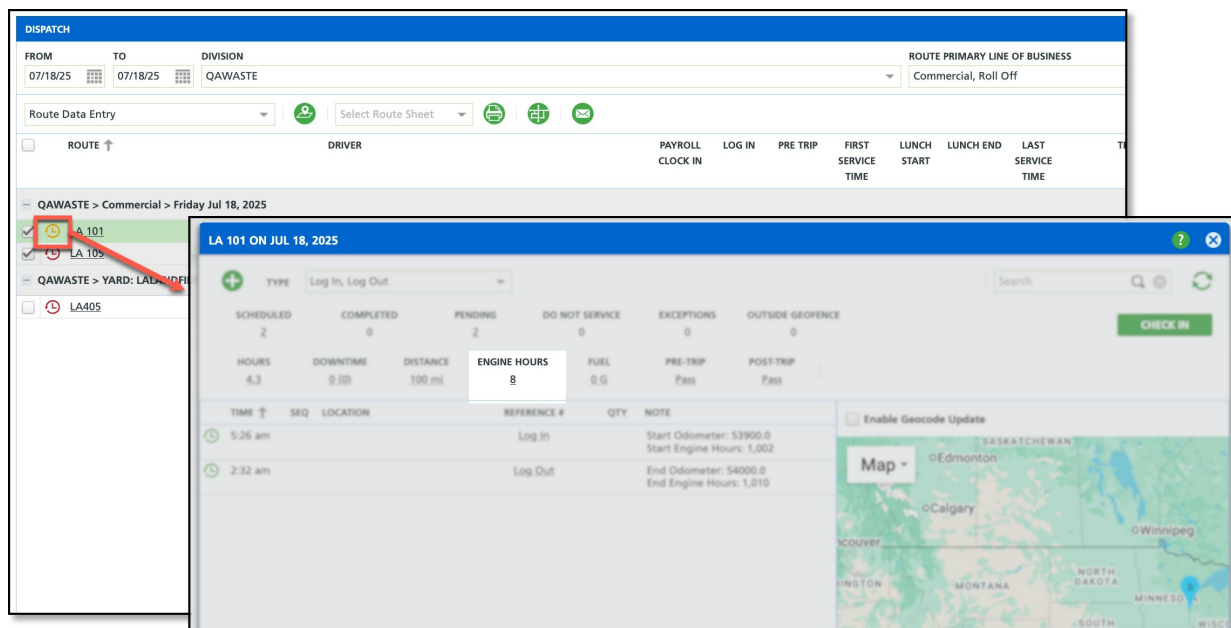
Truck and Route Calendars

In the Truck and Route Calendars, total engine hours for the day are now displayed in the route details for each day.

The screenshot shows the 'ROUTE: LA 101' calendar view for July 2025. The calendar displays dates from Jun 29 to Jul 26. Each date cell contains details about the route status (Scheduled, In Progress, Completed), number of stops and containers, and the driver. A tooltip for July 18 shows: Completed, 2 Stops, 2 Containers, Hours: 4.3, Odometer: 100 mi, Driver: Alliena Somers, Engine Hours: 8.

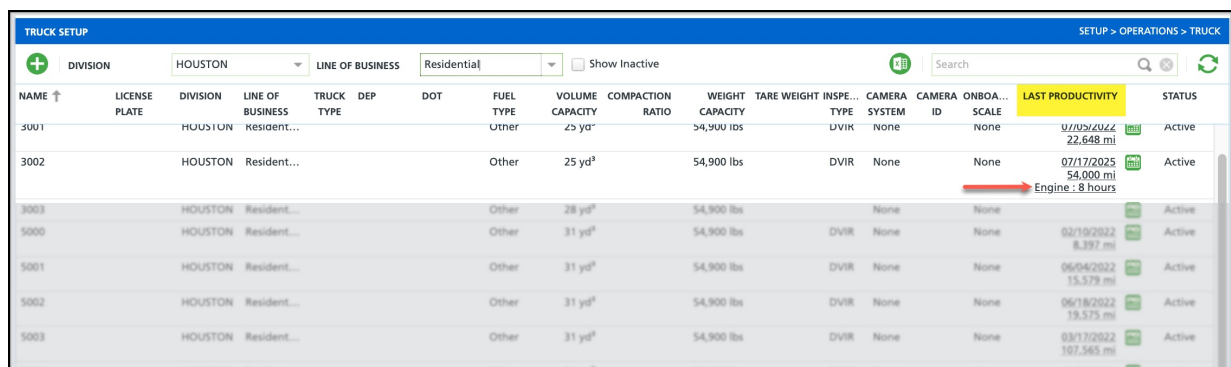
Driver Timeline

Engine Hours has been added to the route and truck summary details as a hyperlink that opens the Truck Productivity window.



Truck Setup and Truck History

In Truck Setup, the Last Productivity column now includes Engine Hours as a hyperlink. When selected, it opens the Truck History popup, where the Start and End Engine Hours columns are also visible.



NavuNav (Android) - Support for Tracking In-State and Out-of-State Mileage (18404) [New Feature]

Tracking for in-state and out-of-state mileage is now available on the Truck Productivity screen (Operations > Dispatch > Driver Timeline) and in NavuNav. When a driver updates the state or province in NavuNav, the change will automatically reflect in Dispatch.

Truck Productivity - Dispatch (Driver Timeline)

HOU 101 ON JUL 18, 2025

TYPE: Completed Work Order, Log In, Log Out

SCHEDULED: 7, COMPLETED: 5, PENDING: 2, DO NOT SERVICE: 0, EXCEPTIONS: 0, OUTSIDE GEOFFENCE: 5

HOURS: 0, DOWNTIME: 0(0), DISTANCE: 281 mi, ENGINE HOURS: 0, FUEL: 0 G, PRE-TRIP: Pass, POST-TRIP: Incomplete

MARK COMPLETED

TIME	SEQ	LOCATION	REFERENCE #	QTY	NOTE
10:24 am			Log In		Start Odometer: 53000.0
10:26 am			Log Out		End Odometer: 53281.0
10:47 am		WED 101 3519 Liberty Dr Pearland, TX 77581	9755635	542	Status changed outside th...
10:47 am			Completed		

Enable Geocode Update

Map

TRUCK PRODUCTIVITY - HOU 101 - FRIDAY, 7/18/25

TRUCK	DRIVER	STATE / PROVINCE	START TIME	START ODOMETER	START ENGINE HOURS	END TIME	END ODOMETER	END ENGINE HOURS
3002	Aliena Somers - Admi...	Wisconsin	10:24 AM	53,000.00		10:26 AM	53,281.00	

SAVE

NavuNav - Driver Check-In

From the Check In screen, drivers can select the state or province where they are servicing sites. This selection is also displayed on the Check Out screen. To clear a selection, an empty space is provided in the drop down for the driver to select.

10:23 Fri, Jul 18

Check In

Truck: 3002

Start Time: 10:23 AM

State / Province: [Dropdown]

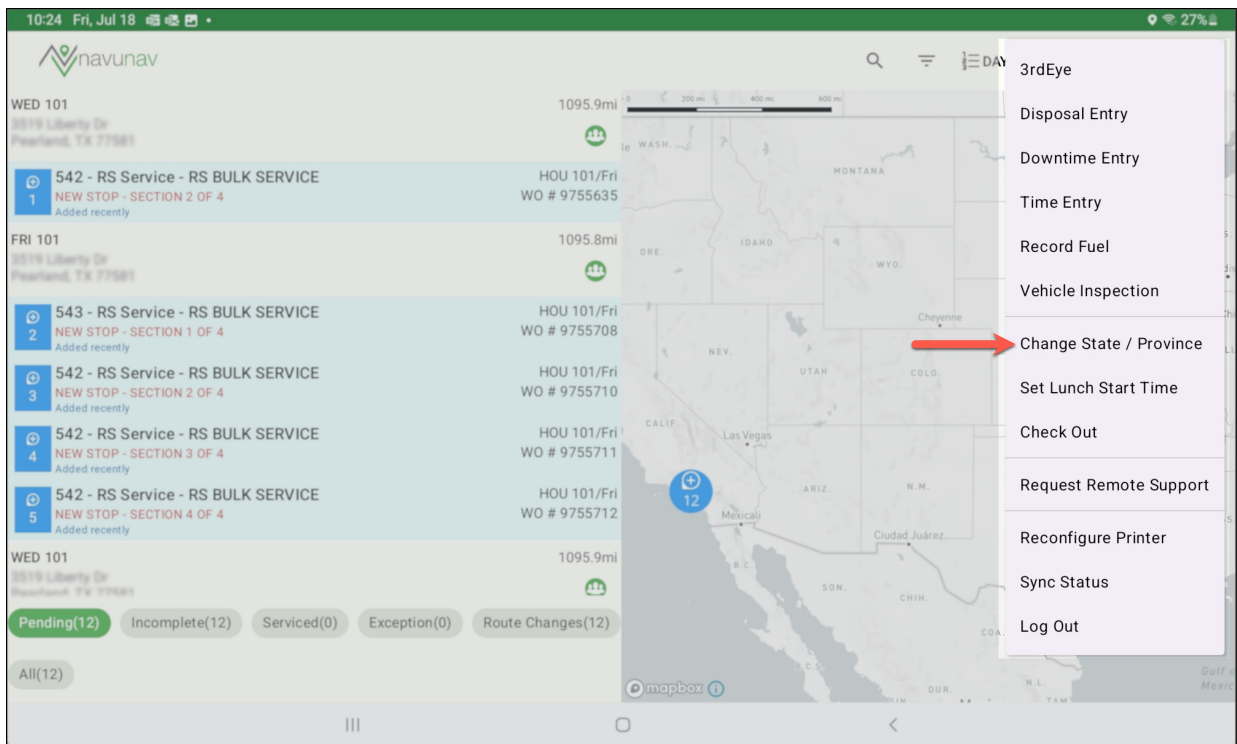
Odometer: 53,000 miles

Engine Hours: [Input]

Set

NavuNav - Driver Menu Options

If a driver needs to update the state or province they are servicing, a "Change State / Province" option is available in the NavuNav menu drop down. To clear a selection, an empty space is provided in the drop down for the driver to select.

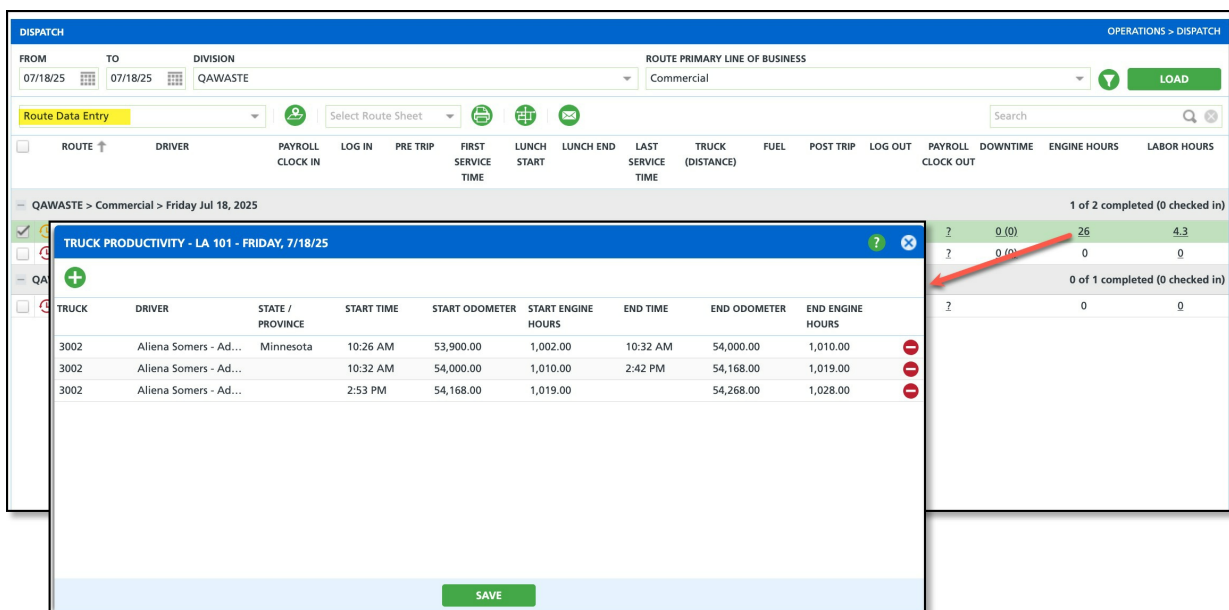


Dispatch (Operations) - Ability to View and Manage Engine Hours (18344) [New Feature]

Engine hour tracking has been added to the following screens:

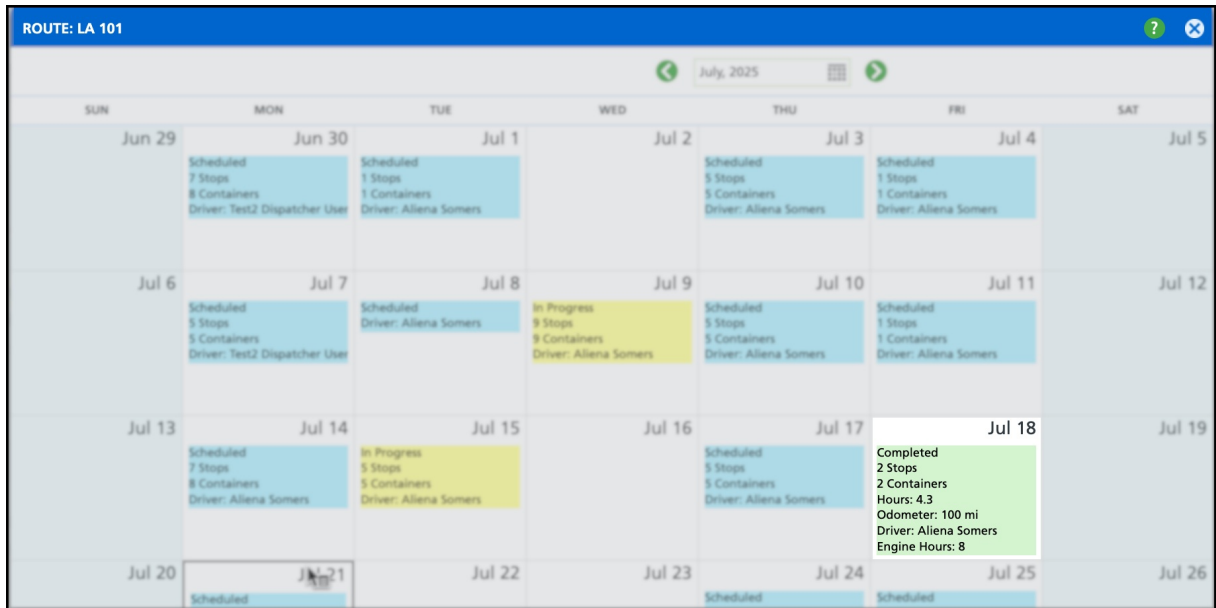
Dispatch and Truck Productivity

In Dispatch, an **Engine Hours** column has been added as a hyperlink that opens the Truck Productivity screen (formerly Truck Odometer). Within the Truck Productivity screen, **Start Engine Hours** and **End Engine Hours** columns have been added, both of which are editable.



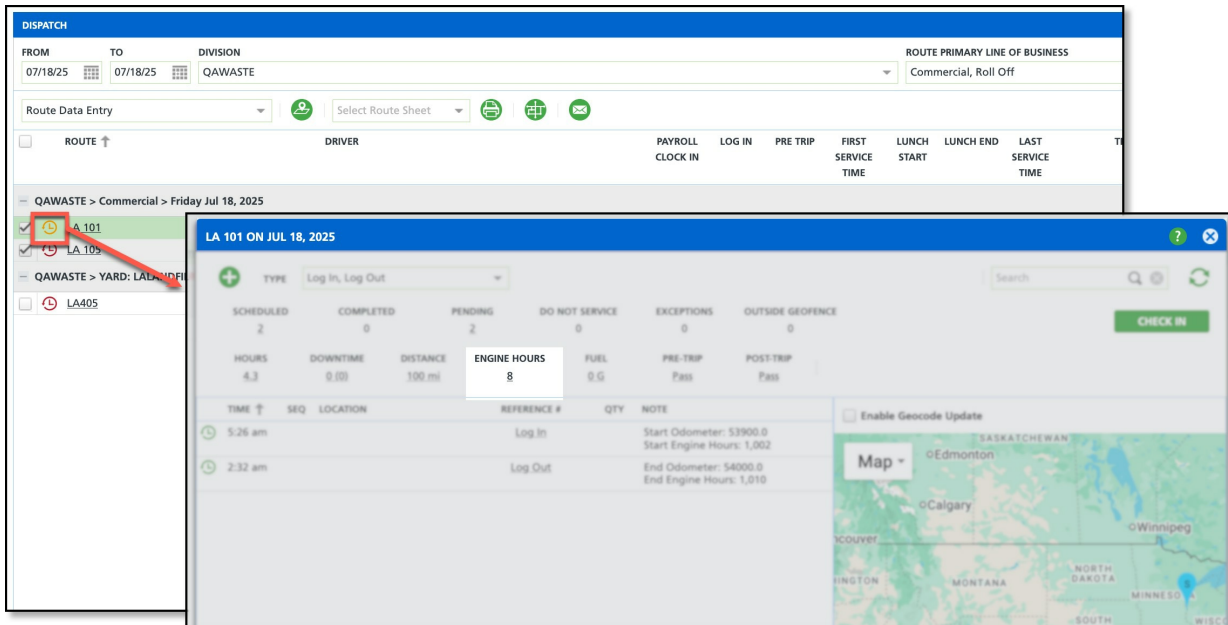
Truck and Route Calendars

In the Truck and Route Calendars, total engine hours for the day are now displayed in the route details for each day.



Driver Timeline

Engine Hours has been added to the route and truck summary details as a hyperlink that opens the Truck Productivity window.



Truck Setup and Truck History

In Truck Setup, the Last Productivity column now includes Engine Hours as a hyperlink. When selected, it opens the Truck History popup, where the Start and End Engine Hours columns are also visible.

TRUCK SETUP														SETUP > OPERATIONS > TRUCK			
DIVISION		HOUSTON	LINE OF BUSINESS		Residential	<input type="checkbox"/> Show Inactive		Search									
NAME ↑	LICENSE PLATE	DIVISION	LINE OF BUSINESS	TRUCK TYPE	DEP	DOT	FUEL TYPE	VOLUME CAPACITY	COMPACTION RATIO	WEIGHT CAPACITY	TARE WEIGHT	INSPE... TYPE	CAMERA SYSTEM	CAMERA ID	ONBOA... SCALE	LAST PRODUCTIVITY	STATUS
3001		HOUSTON	Resident...				Other	<5 yd ³		54,900 lbs		DVIR	None		None	07/15/2022 22,648 mi	Active
3002		HOUSTON	Resident...				Other	25 yd ³		54,900 lbs		DVIR	None		None	07/17/2023 54,000 mi Engine : 8 hours	Active
3003		HOUSTON	Resident...				Other	28 yd ³		54,900 lbs			None				Active
5000		HOUSTON	Resident...				Other	31 yd ³		54,900 lbs		DVIR	None		None	02/10/2022 8,397 mi	Active
5001		HOUSTON	Resident...				Other	31 yd ³		54,900 lbs		DVIR	None		None	06/04/2022 15,579 mi	Active
5002		HOUSTON	Resident...				Other	31 yd ³		54,900 lbs		DVIR	None		None	06/18/2022 19,575 mi	Active
5003		HOUSTON	Resident...				Other	31 yd ³		54,900 lbs		DVIR	None		None	03/17/2022 107,565 mi	Active

Inventory Management (Operations) - Equipment Details Not Displaying at the Bottom of the Inventory Management Screen (18977)

An issue that prevented equipment details from displaying at the bottom of the Inventory Management screen has been resolved.

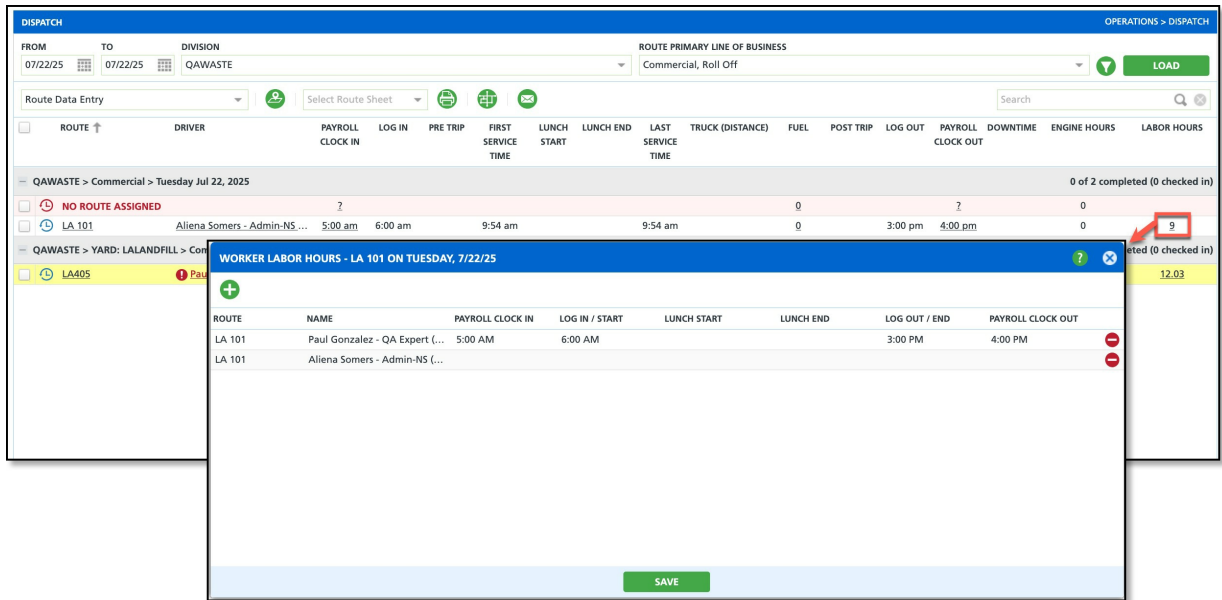
INVENTORY MANAGEMENT						OPERATIONS > INVENTORY MANAGEMENT	
LINE OF BUSINESS		All	IMPORT INVENTORY		Search		
LINE OF BUSINESS	EQUIPMENT TYPE	SERIALIZED	TOTAL QUANTITY	SITE QUANTITY	YARD QUANTITY		
Commercial	10 Yard FL (Ser)	No	34	20	14		
Commercial	2 Yard FL	No	40	7	33		
Commercial	2 Yard FL VIP	No	0	0	0		
Commercial	3 Yard FL	No	0	0	0		
Commercial	3 Yard FL VIP	No	0	0	0		
Commercial	4 Yard FL	No	0	0	0		
Commercial	4 Yard FL VIP	No	0	0	0		
Commercial	6 Yard FL	No	0	1	-1		
Commercial	6 Yard FL VIP	No	0	0	0		
Commercial	8 Yard FL	No	0	2	-2		
Document Destruction	96 Gallon cart Document destruction	No	0	0	0		
Hazardous Material	15 Gallon Closed Top Drum	No	23	3	20		
Hazardous Material	15 Gallon Open Top Drum	No	0	0	0		
Medical Waste	18 Gal Box	No	0	0	0		

DIVISION		All	SERVICE REGION		All	ADD TO YARD		ADD TO SITE		Search	
LOCATION NAME ↑	ADDRESS	QUANTITY	LAST ACTIVITY		DAY(S) SINCE LAST ACTIVITY	AVG DAY(S) BETWEEN ACTIVITY					
- YARDS (4)											
HOMEBASE	1234 S Pearland Ave Pearland, TX 77581-5123	19	08/31/2023 12:19 pm								
HOMEBASE	1234 S Pearland Ave Pearland, TX 77581-5123	-1	09/12/2023 6:23 pm								
Pearland	2526 Smith Ranch Rd Pearland, TX 77584	12	08/17/2023 5:42 pm								
Pearland	2526 Smith Ranch Rd Pearland, TX 77584	3	08/17/2023 5:46 pm								
+ SITES (6)											

Pathway: Operations > Inventory Management

Dispatch (Operations) - Unable to View and Edit Labor Hours (18981)

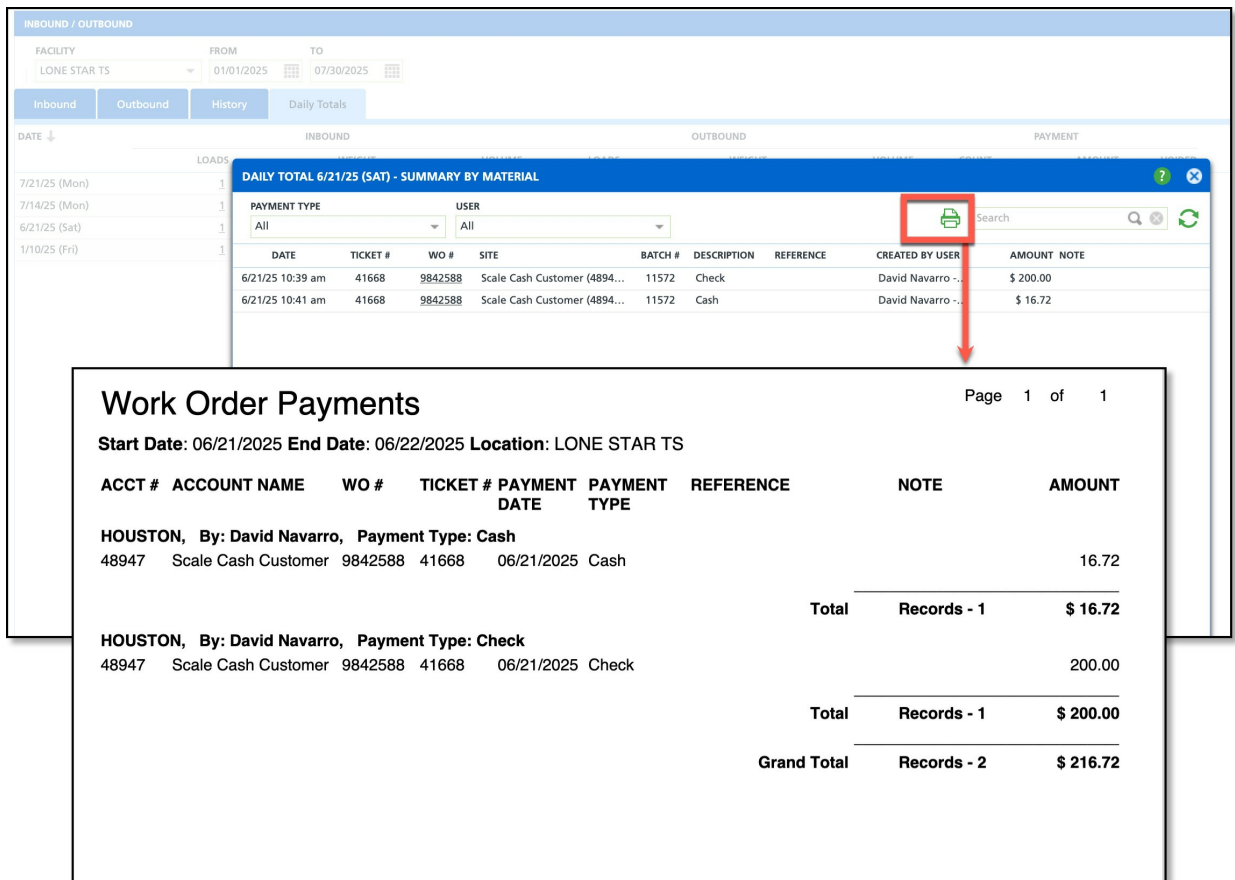
An issue that prevented labor hours from being viewed or edited has been resolved.



Pathway: Operations > Dispatch [Route Data Entry (view)] > Worker Labor Hours

[75.1 Release] Inbound/Outbound (Operations) - Payments not Displaying on Work Order Payments Report (19005)

An issue has been resolved that prevented payments from displaying on the **Work Order Payments Report** that is generated from the Daily Totals tab of the Inbound/Outbound screen.



Pathway: Operations > Inbound / Outbound > Daily Totals [tab]

[75.1 Release] Route Management (Operations) - EOW Services Not Populating Day of Week Drop Down (18265)

An issue has been resolved in the Pending tab of the Route Management screen where the Day of Week drop down was not populating for EOW services.

The screenshot displays the 'Pending' tab of the Route Management screen. At the top, there are tabs for 'Pending', 'Current', and 'Renumber Stops'. Below these are filters for 'QAWASTE', 'ste Me, Los Angeles, Orange Cou', 'Residential', and 'Friday', with a 'LOAD' button. A table lists service details:

SITE	ADDRESS	QTY	SERVICE CODE	FREQUENCY	START DATE ↑	ROUTE
49340001 Ramen	529 E Valley Blvd Alhambra, CA 91801	1	96 Gallon Extra Cart 96 Gallon Trash MSW	EOW F (8 Week)	Fri 08/01/25 Week 31 (B)	

Below the table, there is a 'MAP TYPE' dropdown set to 'Route Day of Week' and a 'DAY OF WEEK' dropdown set to 'Fri'. A red arrow points to the 'DAY OF WEEK' dropdown. A 'DISPLAY ALL LINES OF BUSINESS' checkbox is also visible. The bottom half of the screen shows a satellite map with a red location pin and a street name 'Limansor St'.

Pathway: *Operations > Route Management*

[75.1 Release] Dispatch (Operations) - Blacked-Out Signatures Uploading from NavuNav (19206)

An issue has been resolved that caused a black box to display in place of driver signatures captured in NavuNav.

TRUCK LA-1 - 08/25/2025 VEHICLE INSPECTION RESULTS			
INSPECTION ITEM ↑	PRE TRIP RESULT	POST TRIP RESULT	NOTES
Backup Camera Functional	Pass		
Instruments and Gauges	Pass		
License Plate(s) and Registration	Pass		
Lights and Reflectors	Pass		
Tires, Wheels, and Rims	Pass		
Vehicle Damage	Pass		
Windshield Wipers	Pass		

PRE TRIP	Aliena Somers	<i>al</i>	08/25/2025 9:17 am
POST TRIP			

ORDER ID	TYPE	SOURCE	TARGET DATE	STATUS	ASSIGNED TO	NOTES

Pathway: Operations > Dispatch > Pre-Trip Inspection Results

Accounting

AR Payment Batch (Accounting) - Screen Update for Posted Batches (17954)

The AR Payment Batch screen has been updated to disable the Deposit and Auto Apply fields for posted batches. Additionally, the 'Apply,' 'Delete,' and 'Pencil' icons (*not shown*) are now hidden once the posted batch is closed.

BATCH - 11483 DIVISION - QAWASTE									
DATE	01/02/2025	BANK ACCOUNT	NAVU WELLS			SOURCE	Select Source		
NOTE		CREATED BY:	Aliena Somers - Admin-NS (Sales) - 01/02/2025 5:59 am		POSTED BY:	Aliena Somers - Admin-NS (Sales) - 01/02/2025 6:04 am		STATUS	Posted
+	SORT	Entry Order ↓	DEFAULT PAYMENT TYPE		COUNT	4		Search for Payment in Batch	
ACCOUNT ID	NAME	STATUS	BALANCE	TYPE	REFERENCE	AMOUNT	APPLIED AMOUNT	DEPOSIT	AUTO APPLY
49232	Caribou Coffee	Active		Credit Card	444	50.00	50.00	<input type="checkbox"/>	<input type="checkbox"/>
49232	Caribou Coffee	Active		Check	333	50.00	50.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>
49232	Caribou Coffee	Active		Credit Card	222	50.00	50.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>
49232	Caribou Coffee	Active		Check	123	100.00	100.00	<input type="checkbox"/>	<input type="checkbox"/>

Pathway: Accounting > AR Payment Batch

Period Closing (Accounting) - Screen Logic Updated (17953)

The logic on the Period Closing screen has been updated to display only records based on the user's division access as defined in their User Account.

PERIOD CLOSING

DIVISION	PERIOD	PERIOD CLOSING	CLOSED BY
Texas	Sep 2022	Close Period / Reopen Prior Period	Matthew Van Doren - Admin - NS (Admin) - 03/18/2024 2:36 pm
DAYTON	Oct 2022	Close Period / Reopen Prior Period	Lori Smith - Admin-NS (Admin) - 03/02/2023 1:22 pm
HOUSTON	Jan 2023	Close Period / Reopen Prior Period	David Navarro - Admin-NS (Admin) - 03/27/2024 4:47 pm
QAWASTE	Sep 2022	Close Period / Reopen Prior Period	Matthew Van Doren - Admin - NS (Admin) - 03/18/2024 2:36 pm
CORPUS	Aug 2022	Close Period / Reopen Prior Period	Matthew Van Doren - Admin - NS (Admin) - 03/21/2025 1:42 pm
HEARNE	Oct		
HILLSBORO	Sep		
TEST	May		

USER SETUP

DEPARTMENT: All | HIDE INACTIVE: | Search: []

ID	STATUS	FIRST NAME	LAST NAME	EMAIL	PHONE	O DEFAULT APP P COLOR	DEFAULT HOME PAGE	ONLINE IMAGE	AUTOMATIC COUNTERSIGN	SIGNATURE IMAGE
2	Active	David	Navarro	davidn@navu...	+1281216...	Dark Green	Recent Activity	View	No	
3	Active	Michael	Shannon	michaels@nav...		Dark Gray	Dashboard		No	
4	Active	Nikita	Rajyani	nikita@navus...		Dark Gray	Sales Represe...		No	
5	Active	Aliena	Somers	aliena@FakeE...		Blue	Recent Activity		No	
6	Active	CT	ct@navusoft.com	ct@navusoft.c...		Dark Gray	Recent Activity		No	
7	Active	Matthew	Van Doren	matthew@na...		Dark Green	Recent Activity		No	
8	Active	Dereck	Curtis	dereck@navu...		Blue	Recent Activity		No	
9	Active	Brad	Sovich	brads@navus...		Dark Gray	Recent Activity		No	

Roles | Divisions | Commission Plan | Capabilities

DIVISION ID	DIVISION NAME	MAX DEFAULT RATE DISCOUNT
1001	QAWASTE	<input type="checkbox"/>
1002	CORPUS	<input type="checkbox"/>
1003	DAYTON	<input type="checkbox"/>
1004	HOUSTON	<input type="checkbox"/>
1005	HILLSBORO	<input type="checkbox"/>
1006	HEARNE	<input type="checkbox"/>

Pathway: Accounting > Period Closing | Setup > System > User

Status Management (Accounting) - Fix Applied to 'Has Active Service' Field (18238)

An issue has been resolved where the **Has Active Services** column in the *Debt Recovery / Received Payments* tab incorrectly displayed 'No' for accounts that do have an active service.

STATUS MANAGEMENT | ACCOUNTING > STATUS MANAGEMENT

Status Changes | Debt Recovery / Received Payments | Credit Hold Eligible | Credit Hold Accounts | Internal Collection Accounts | External Collection Accounts

DIVISION: All | STATUS: All | BILL GROUP: All | COLLECTION GROUP / AGENCY: All | PAYMENT WITHIN LAST: Date Range | FROM: 11/01/2024 | TO: 05/23/2025 | 3 Records | Search: []

NAME	STATUS	STATUS CHANGE DATE	HAS ACTIVE SERVICES	COLLECTION GROUP / AGENCY	LAST PAYMENT	PAYMENTS SINCE STATUS CHANGE	WRITE OFF AMOUNT	CURRENT	1-30	31-60	61-90	91-120	OVER 120	TOTAL
California Grill & Bar 49018	External Collecti...	02/24/2025 58 Days	No	AGENCY2	11/12/2024			0.00	0.00	0.00	0.00	0.00	730.00	730.00
Navu Services 49042	Credit Hold	03/11/2025 43 Days	Yes		11/12/2024			25.00	0.00	0.00	0.00	0.00	256.93	281.93
El Portal Restaurant 49045	Credit Hold	02/25/2025 57 Days	Yes		04/15/2025	\$ 3,000.00 (2)		-3,000.00	0.00	0.00	0.00	0.00	76,298.28	73,298.28

Pathway: Accounting > Status Management

AR Payment Batch (Accounting) - Enhancements to AR Payment Batch (18336) [New Feature]

The following enhancements have been applied to AR Payment Batch:

Control Total

A new optional 'Control Total' field has been added to Create Payment Batch as a built-in checks-and-balances feature to help prevent data entry errors and ensure batch accuracy before processing.

Post Logic:

- If the Control Total field is null/blank for the batch, the Post button remains enabled.
- If a value is entered in the Control Total field and the payment amount does not match exactly, the Post button is disabled and a message is displayed indicating the discrepancy.

The screenshot displays the 'AR PAYMENT BATCH' interface. A 'CREATE PAYMENT BATCH' popup is open, showing fields for DIVISION (QAWASTE), DATE (05/14/2025), PERIOD (May 2025), BANK ACCOUNT (NAVU WELLS), SOURCE (Select Source), CONTROL TOTAL (500.00), and NOTE. The main batch window shows a table with one entry: Account ID 49315, Name Viebrock Associates, Status Active, Type Cash, Amount 500.01. A yellow banner at the bottom states: 'Posting disabled, batch total \$ 500.01 does not match control total \$ 500.00'. The 'POST' button is disabled. The 'CONTROL TOTAL' field shows 500.00 and the 'Amount' field shows \$ 500.01. Red arrows point to the discrepancy message and the amount field.

Search Type

A new 'Search Type' field has been added to the **Search Accounts / Sites** popup window when adding a payment.

The screenshot shows the 'SEARCH ACCOUNTS / SITES' popup window. A red arrow points to the 'SEARCH TYPE' dropdown menu, which is currently set to 'Accounts'. The dropdown list includes: Accounts, Account ID, Account Address, Account Name, Sites, Site ID, Site Address, Site Name, Invoice, and Purchase Order. The background shows the same batch interface as the previous screenshot, with the 'POST' button disabled and the discrepancy message visible.

Pathway: Accounting > AR Payment Batch

AR Batch Report (Accounting) - Report Logic Updated to Include Accounts with Collection Status (18301)

The logic for the AR Batch Report, available when reviewing a payment batch, has been updated to include accounts with a collection status.

AR Batch Report - 11559					Type	Payment
Note NAVU-18301 Test					Date	May 22, 2025
					Period	May 2025
					Bank Account	NAVU WELLS
Account ID	Name	Status	Type	Reference	Note	Amount
48974	The Westin Bonaventure Hotel & Suites, Los Angeles	External Collections	Check	3362		100.00
49063	Starbucks	Internal Collections	Check	3395		200.00
Total						300.00
Check						300.00
Total						300.00
QAWASTE						300.00
Total						300.00

Pathway: Accounting > AR Payment Batch

AR Aging Management (Accounting) - Broker Group Filtering Added to Multiple Screens (18406)

A **Broker Group** filtering option has been added to the AR Aging Management, Surcharge Management, and Adjustment History & Pending Approval screens. As part of this update, filters on the AR Aging Management screen have also been reordered for improved usability.

AR AGING MANAGEMENT

DIVISION: Texas, DAYTON, HOUSTON, QAWASTE, CORPUS, HEARNE, HIL
 TYPE: AR Aging By Past Due Date
 ACCOUNT CLASS: asdf, AUTOCH, BROKER, CLASSTEST, COMMERCIAL, Example
 TERM: All
 BILL GROUP: All

SURCHARGE MANAGEMENT

DIVISION: [Dropdown]
 SERVICE REGION: [Dropdown]
 BROKER GROUP: arbam Group, Atlas Group, C
 SURCHARGE GROUP: All
 SURCHARGE: All

ADJUSTMENT HISTORY AND PENDING APPROVAL

ADJUSTMENT ID	DIVISION	ACCOUNT	ACCOUNT NAME	INVOICE	AMOUNT	REASON CODE
Count: 12					Total Amount:	\$16,203.60
11488	CORPUS	34015	WASTE MGMT- CRACKER ...	792968	\$(35.00)	ADJ-United Group
Requires 2 Approvals						
11538	DAYTON	30622	PIZZA HUT	793759	\$(60.78)	ADJ-United Group
Requires 2 Approvals						
11428	CORPUS	33246	WASTE MGMT - HEB STO...	837056	\$(102.07)	COURTESY
Requires 2 Approvals Note: notes						
11240	QAWASTE	43696	JUICE IT UP	891477	\$(5,300.00)	COURTESY
Requires 2 Approvals						

Pathway: Accounting > AR Aging Management; Adjustment History and Pending Approval | Sales > Surcharge Management

Invoice Notification Monitoring (Accounting) - Bill Group Filter Not Limiting to Selected Division (18702)

An issue has been resolved that prevented the Bill Group filter in Invoice Notification Monitoring from limiting the displayed bill groups based on the selected Division filter.

INVOICE NOTIFICATION MONITORING

DIVISION: HOUSTON
 BILL GROUP: [Dropdown Menu]
 PERIOD: Jun 2025
 TYPE: [Dropdown]

BATCH ID: [Blank]
 TYPE: [Blank]

- All
- 28 Day Arrears
- Annual Billing
- HOU - Anniversary 4 week Arrears
- HOU-Anniversary 30 Day Advance
- HOU-Anniversary 4 week Advance
- HOU-COMMERCIAL ARREARS
- HOU-MANUAL INVOICES
- HOU-Q1-JAN-APR-JUL-OCT
- HOU-Q2-FEB-MAY-AUG-NOV
- HOU-Q3-MAR-JUN-SEP-DEC

Pathway: Accounting > Invoice Notification Monitoring

Billing (Accounting) - Enhancements to Proration Methods (18613)

Enhancements have been made to service days-based proration methods in the version 75 release.

Setup

Account Class (Setup) - 'Default Receive Service Notification' Field Reverting Back to 'Yes' (18156)

An issue has been resolved to **Add/Update Account Class** where the 'Default Contact Service Notification' setting would revert to 'Yes' after being changed to 'No'.

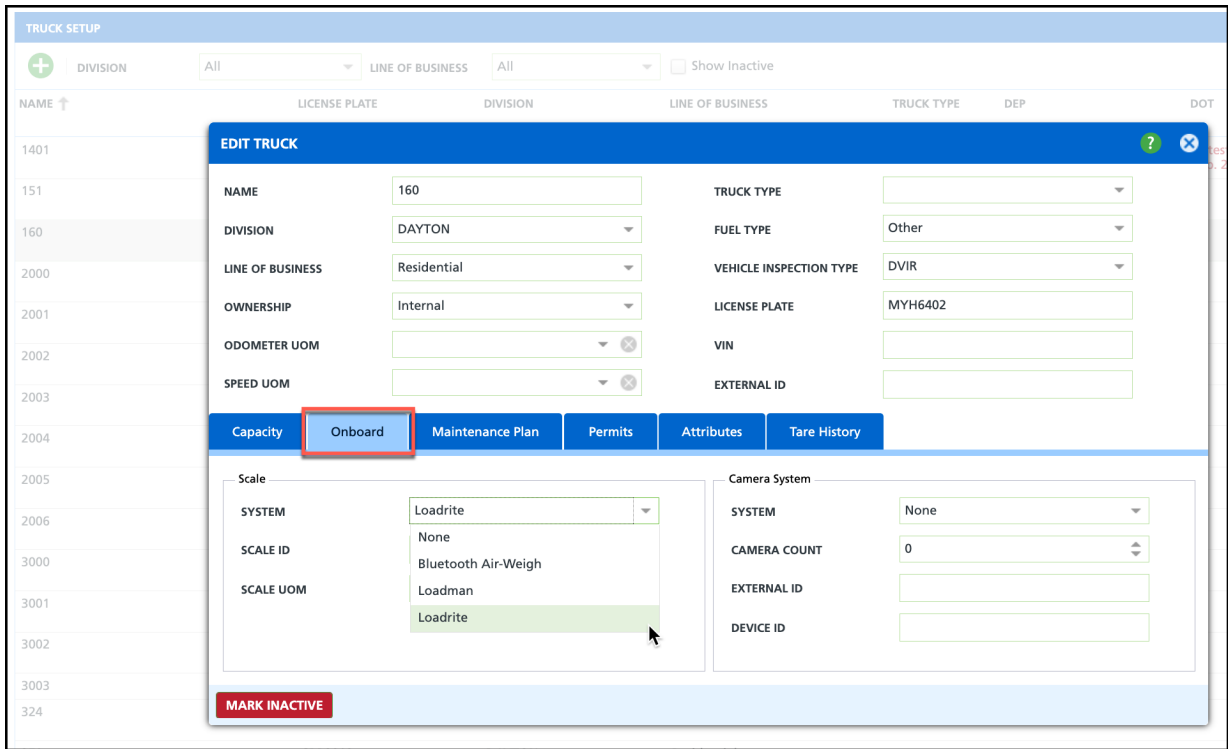
The screenshot shows the 'ADD ACCOUNT CLASS' form with the following fields and values:

Field Name	Value
NAME	[Empty]
ACTIVE	[Dropdown]
TYPE	Business
INTERCOMPANY	No
GL ACCOUNT	[Dropdown]
GL SEGMENT	[Dropdown]
DEPOSIT GL ACCOUNT	[Dropdown]
DEPOSIT GL SEGMENT	[Dropdown]
DEFAULT ACCOUNT CREDIT LIMIT	[Dropdown]
DEFAULT ACCOUNT TERM	[Dropdown]
DEFAULT REBATE PAYMENT TYPE	[Dropdown]
DEFAULT BILL BY SITE	No
DEFAULT CONTACT LINK TYPE	Account
DEFAULT CONTACT SERVICE NOTIFICATION	No
GEOCODING TYPE	[Dropdown]
GEOFENCE RADIUS (METERS)	30
NEW ACCOUNT NOTIFICATION TEMPLATE	[Dropdown]
ENABLE LINKING CONTACTS TO ALL SITES	Yes
LOAD ACTIVE ACCOUNTS IN PIPELINE MAP	Yes
EXCLUDE FROM NAVU SALES	No
ENABLE DUPLICATE ACCOUNT AND SITE CHECK	Yes
HIDE RATE ON WORK ORDER FORMAT	No
REQUIRE BILLING CONTACT	<input type="checkbox"/>
REQUIRE GENERATOR TYPE	<input type="checkbox"/>
REQUIRE SITE CLASS	<input type="checkbox"/>

A 'SAVE' button is located at the bottom center of the form.

Truck Setup (Setup/Operations) - Loadrite Scale Option Added (18018)

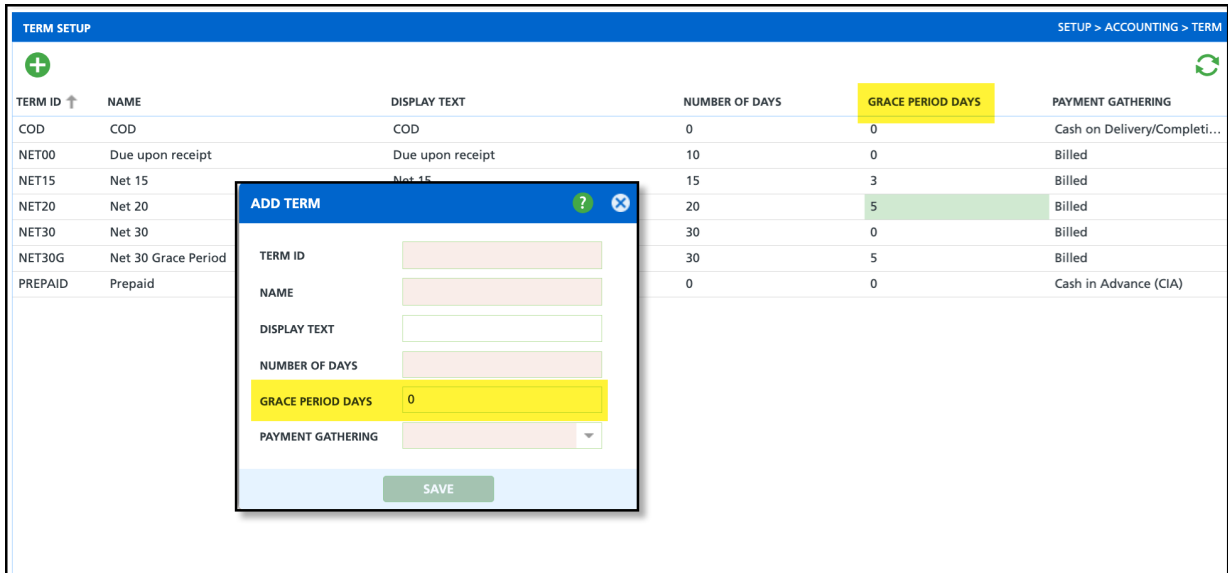
A new onboard scale type, **Loadrite**, has been added to the **Scale - System** drop down menu within Truck Setup.



Pathway: Setup > Operations > Truck

[75.1 Release] Term (Setup) - New 'Grace Period Days' Added (18338, 18339) [New Feature]

A "Grace Period Days" column has been added to **Term Setup**, allowing users to define a grace period for billing terms. This enhancement provides greater flexibility in managing due dates by extending the time before a payment is considered late. The default setting for this '0'.

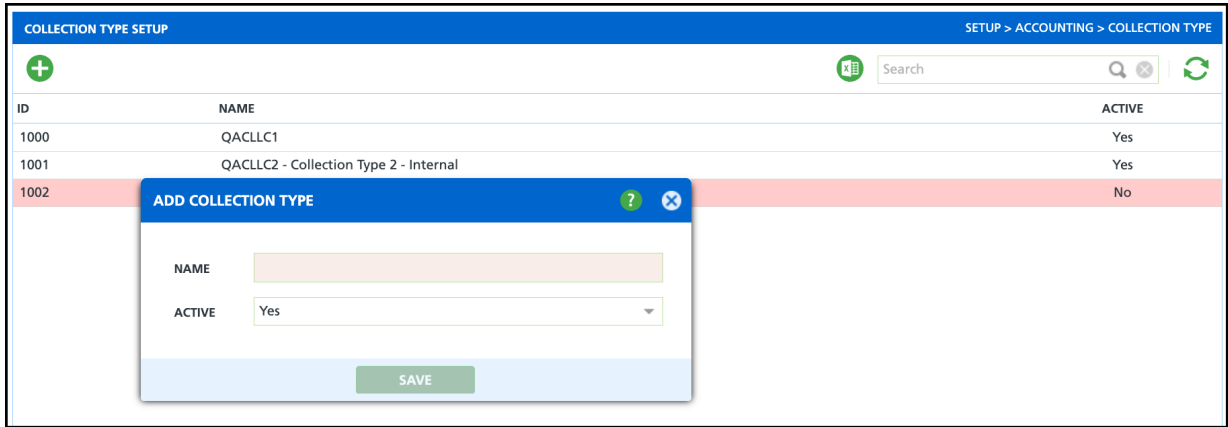


Pathway: Setup > Accounting > Term

Collection Type (Setup/Accounting) - New Screen Added (18337) [New Feature]

A new 'Collection Type Setup' screen has been added under **Setup > Accounting**. Collection types created here will populate the **Collection Type** drop down on the following screens:

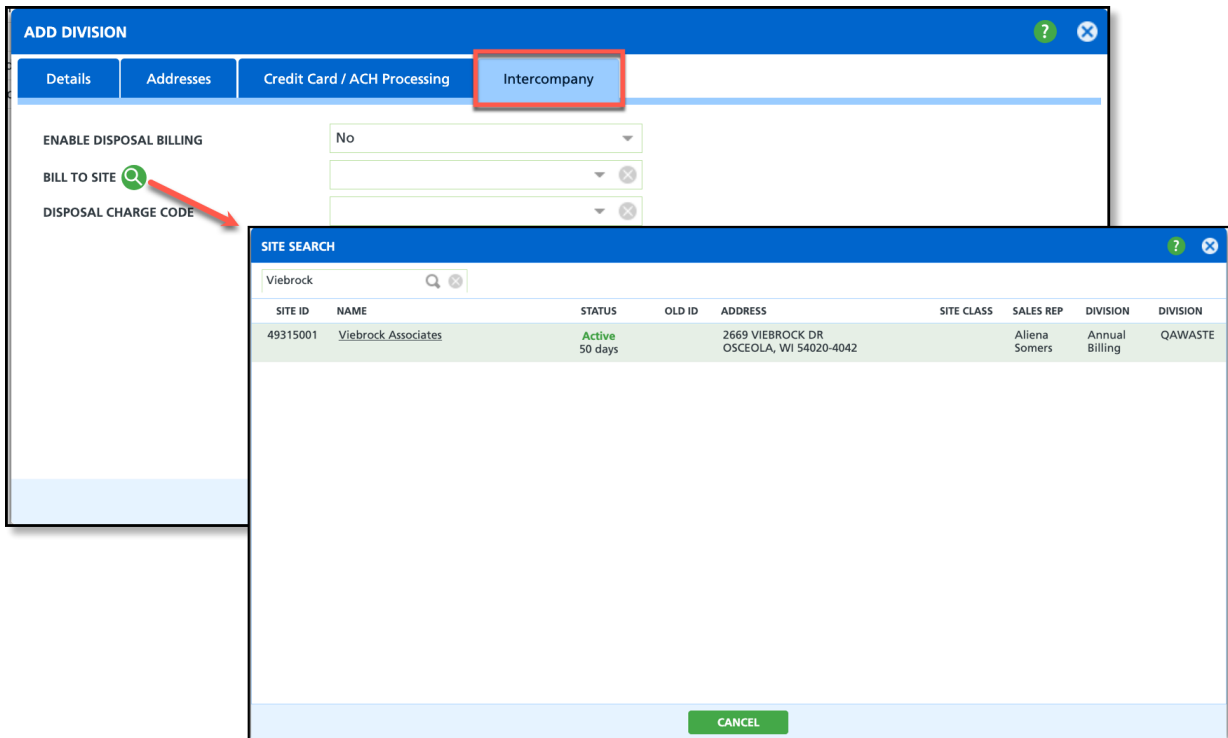
- **Edit Account** - New field added to the **Account** tab
- **Customer Service** - Not a drop down, but displays the Collection Type (if one is assigned) in the **Account Details** section
- **Aging Management** - New **Collection Type** filter added



Pathway: Setup > Accounting > Collection Type

Division (Setup/System) - Intercompany 'Bill to Site' Link Not Opening Search (18313)

An issue has been resolved that prevented the **Site Search** from opening for intercompany sites in **Division Setup**. Clicking the search icon will now correctly display the **Site Search** popup window.



Pathway: Setup > System > Division

Notification Template (Setup / System) - New Keypath Added to Credit Card Expiration Notification Template (18229)

The **Customer Portal URL** keypath has been added to the **Credit Card Expiration** notification template. This update is intended to encourage customers to manage their autopay and payment methods directly through the

portal, helping reduce inbound calls by guiding them to their online account.

NOTIFICATION TEMPLATE SETUP

TYPE: Credit Card Expiration

ID: 75, 107

EDIT NOTIFICATION TEMPLATE

TYPE: Credit Card Expiration | NAME: Credit Card Template | ACTIVE: Yes

RESPONSE REQUEST TYPE: [Dropdown]

Email Design | Text Message Design

DEFAULT SUBJECT: Credit Card Expiration Notice | CONTENT TYPE: text/html

DEFAULT MESSAGE: Dear @@account.id;; - @@account.name;;

Your @@creditcardtype;; credit card ending with @@lastfourdigits;; is set to expire on @@expiratedate;;

Status @@autopay.active;;

@@autopay.accountid;;

Please contact us to update your automatic payment settings to avoid an interruption of service.

@@@division.logo;;
@@@division.name;;
@@@division.city;;, @@@division.state;
Phone: @@@division.mainphone;;
@@@division.email;;

****remember to reset Div email after checking

KEY PATHS: url, manage.autopay.account.url

SAVE

Pathway: Setup > System > Notification Template

Truck (Setup/Operations) - Export Option Added to Screen (18184) [New Feature]

The Truck Setup screen has been updated to include an Excel Export option.

NAME	LICENSE PLATE	DIVISION	LINE OF BUSINESS	TRUCK TYPE	DEP	DOT	FUEL TYPE	VOLUME CAPACITY	COMPACTION RATIO	WEIGHT CAPACITY	TARE WEIGHT	INSPE. TYPE	CAMERA SYSTEM	CAMERA ID	ONBOARD SCALE	LAST ODOMETER	STATUS		
2004		HOUSTON	Commercial				Other	28 yd ³		54,900 lbs	35,200 lbs	DVIR	None	None	76,000 mi	04/22/2024	Active		
2005		HOUSTON	Commercial				Other	28 yd ³		54,900 lbs		DVIR	None	None	200,000 mi		Active		
2006	1	Name	License Plate	Division	Line of Business	Truck Type	DEP	DOT	Fuel Type	Volume Capacity	Compaction	Weight Capacity	Tare Weight	Inspection Type	Camera System	Camera ID	Onboard Scale	Last Odometer	Status
3000	2	1401	HOUSTON	Medical Waste	Commercial	LARGE	testExp. 2/1: dotestExp. 2	Diesel	Other	0 yd ³	0 tons	7,100 lbs		DVIR	None	None	None	57,781 km05/02	Active
3000	3	151 GNV3838	DAYTON	Commercial	Commercial				Other	0 yd ³	6,500 lbs			DVIR	None	None	None	277,384 mi09/1	Active
3001	4	150 MYH6402	DAYTON	Residential	Commercial				Other	28 yd ³	54,900 lbs			DVIR	None	None	None	231,393 mi06/0	Active
3001	5	2000 XYZ2123	HOUSTON	Commercial	Commercial				Other	28 yd ³	54,900 lbs	8,000 lbs		DVIR	None	None	None	251,125 mi07/1	Active
3002	6	2001	HOUSTON	Commercial	Commercial	TEST			Other	28 yd ³	54,900 lbs			DVIR	None	None	None	311,103 mi09/12	Active
3002	7	2002	HOUSTON	Commercial	Commercial				Other	28 yd ³	54,900 lbs			DVIR	None	None	None	37,646 mi06/13	Active
3003	8	2003 H675AX	HOUSTON	Commercial	Commercial				Other	28 yd ³	54,900 lbs	38,000 lbs		DVIR	None	None	None	666,667 mi04/2	Active
3003	9	2004	HOUSTON	Commercial	Commercial				Other	28 yd ³	54,900 lbs	35,200 lbs		DVIR	None	None	None	76,000 mi12/06	Active
324	10	2005	HOUSTON	Commercial	Commercial				Other	28 yd ³	54,900 lbs			DVIR	None	None	None	200,000 mi03/1	Active
350	11	2006	HOUSTON	Commercial	Commercial				Other	28 yd ³	54,900 lbs			DVIR	None	None	None	125,000 km03/1	Active
350	12	3000	HOUSTON	Residential	Residential				Other	25 yd ³	54,900 lbs			DVIR	None	None	None	15,192 mi03/26	Active
350	13	3001	HOUSTON	Residential	Residential				Other	25 yd ³	54,900 lbs			DVIR	None	None	None	22,648 mi03/05	Active
351	14	3002	HOUSTON	Residential	Residential				Other	25 yd ³	54,900 lbs			DVIR	None	None	None	53,000 mi09/06	Active
351	15	3003	HOUSTON	Residential	Residential				Other	28 yd ³	54,900 lbs			DVIR	None	None	None		Active
351	16	324 B560941	CORPUS	Residential	Residential				Other	25 yd ³	54,900 lbs			DVIR	None	None	None	323,319 mi04/1	Active
351	17	350 G8B3203	DAYTON	Residential	Residential				Other	27 yd ³	54,900 lbs			DVIR	None	None	None	102,856 mi06/1	Active
351	18	351 NGW1564	CORPUS	Residential	Residential				Other	28 yd ³	54,900 lbs			DVIR	None	None	None	340,505 mi10/2	Active
351	19	380 JKV3847	DAYTON	Residential	Residential				Other	27 yd ³	54,900 lbs			DVIR	None	None	None	181,436 mi06/2	Active
351	20	382 LW0688	DAYTON	Residential	Residential				Other	28 yd ³	54,900 lbs			DVIR	None	None	None	156,051 mi10/0	Active
351	21	383 NCV0617	DAYTON	Residential	Residential				Other	28 yd ³	54,900 lbs			DVIR	None	None	None	144,745 mi06/2	Active
351	22	384 NKR4330	DAYTON	Residential	Residential				Other	28 yd ³	54,900 lbs			DVIR	None	None	None	99,994 mi11/07	Active

Pathway: Setup > System > Truck

Task Type (Setup/Account) - Logic and Naming Updated to 'Assign to Default' Column (18353)

On the Task Type Setup screen, the second Assign to Default column has been renamed to Assign to Specific User. Additionally, the logic has been updated so that if any option other than Specific User is selected in the Assign to Default column, the associated user name will be cleared automatically.

TASK TYPE SETUP					
TASK ID	NAME	TYPE	ASSIGN TO DEFAULT	ASSIGN TO SPECIFIC USER	DEPARTMENT
1	Proposal Follow Up	Internal Site Level	Specific User	PG 2	Sales
2	Send Proposal	Internal Site Level	Account Manager		Sales
3	Send Marketing Material	Internal Site Level	Account Manager		Sales
4	Pick Up Bid Package	Internal Site Level	Account Manager		Sales
5	Complete Proposal	Internal Site Level	Account Manager		Sales
6	Update Proposal	Internal Site Level	Account Manager		Sales
7	Pick Up Check	Internal Site Level	Account Manager		Sales
8	Complaint Follow Up	Internal Site Level	Account Manager		Sales
9	Send Insurance Certificate	Internal Site Level	Account Manager		Sales
10	Confirm appointment	Internal Site Level	Account Manager		Sales
12	Follow Up	Internal Site Level	Account Manager		Sales

Pathway: Setup > Account > Task Type

GL Segmentation (Setup / Accounting) - Added Support for Division Cost Center Segment (18325)

To support for division cost center segment, the following settings have been added:

- 'Division Cost Center' has been added to Add/Update Division.
- 'Division Cost Center' was added to the Revenue segments 1 through 4 (Length of 8) in GL Segmentation Setup.

The screenshot shows two overlapping windows. The background window is 'UPDATE DIVISION' with tabs for Details, Addresses, Credit Card / ACH Processing, Cost / Target Pricing, and Intercompany. The 'Details' tab is active, showing fields for NAME (QAWASTE), MAIN PHONE, TOLL FREE PHONE, FAX, EMAIL, TIME ZONE (Pacific Standard Time), SERVICE NOTIFICATION FROM EMAIL (QA_Div_Svc@navusoft.com), DIVISION GROUP (Texas), EPA ID (EPA_123), SEGMENT (QA123), DIVISION COST CENTER (8BAB8), EXTERNAL DB ID (QA), ENABLE INTEGRATION (None), ERP LABEL, and NOTE. A red circle with the number '1' is placed over the 'DIVISION COST CENTER' field.

The foreground window is 'GL SEGMENTATION SETUP' with fields for ACTIVE (Active), FILLER ('0'), and SEPARATOR (-). A red warning message states: 'Any modifications to segmentation will be applied to new transactions.' Below this are three sections: AR, Write Off, and Revenue. The Revenue section contains a table with columns for SEGMENT, LENGTH, and SOURCE. Segment 3 is highlighted in yellow and has a red circle with the number '2' next to it. The table data is as follows:

SEGMENT	LENGTH	SOURCE
SEGMENT 1	5	Transaction GL account
SEGMENT 2	4	Line of Business
SEGMENT 3	8	Division Cost Center
SEGMENT 4	0	

Below the Revenue section is a 'Surcharge' section with two rows of SEGMENT, LENGTH, and SOURCE fields.

Pathway: Setup > Accounting > GL Segmentation | Setup > System > Division

Update Route (Setup / Operations) - Default Truck Not Showing in Update Route (18239)

An issue has been resolved that caused the default truck to display inconsistently between Route Setup and Edit Route Record.

ROUTE SETUP

DIVISION: HOUSTON LOB: Residential

ROUTE ID	NAME ↑	DIVISION	LOB	DEFAULT TRUCK
1059	HOU 101	HOUSTON	Residential	3002
1060	HOU 102	HOUSTON	Residential	3001
1061	HOU 103	HOUSTON	Residential	1401
1062	HOU 104	HOUSTON	Residential	5014
1063	HOU 105	HOUSTON	Residential	5002
1064	HOU 106	HOUSTON	Residential	5018
1065	HOU 107	HOUSTON	Residential	5012
1066	HOU 108	HOUSTON	Residential	5015
1067	HOU 109	HOUSTON	Residential	5003
1068	HOU 110	HOUSTON	Residential	5005
1069	HOU 111	HOUSTON	Residential	5001
1070	HOU 112	HOUSTON	Residential	5009
1071	HOU 113	HOUSTON	Residential	5008
1072	HOU 114	HOUSTON	Residential	5016

EDIT ROUTE RECORD - HOU 103 - 5/15/2025

TRUCK: 1401 SET AS DEFAULT

DRIVER: Aliena Somers - Admin-NS (Sales) SET AS DEFAULT

HELPER 1: SET AS DEFAULT

HELPER 2: SET AS DEFAULT

ROUTE DESCRIPTION: SET AS DEFAULT

SCHEDULED START TIME: --:--:--

EXPECTED END TIME: --:--:--

STATUS: Scheduled

DEFAULT DISPOSAL LOCATION:

TRANSPORTER:

START YARD:

END YARD:

SAVE

Pathway: Setup > Operations > Route

Search (Accounts) - Ability to Search Work Orders on PO Number Added (18106)

The ability to search Work Orders by PO Number has been added to the Work Order search type. A PO Number column has also been included in the Search Results screen for reference.

SEARCH TYPE: Work Order

1234567 **SEARCH**

1 record

WORK ORDER #	SITE ID	NAME	STATUS	OLD ID	ADDRESS	DIVISION	PO NUMBER
9646271	49317	Willette, Kristopher	Active		1234 Viebrock Dr Osceola, WI 54020-4042	QAWASTE	1234567

Pathway: Accounts > Search > Work Order

Division/Service Region/Permissions (Setup) - Updates to ERP Fields (18205)

ERP-related changes have been applied to the following system screens:

Permissions

A new permission, **478 (Edit Account SAP ID)**, has been added to the Accounts module. This permission allows users to edit the ERP ID field on the Edit Account screen. If the permission is not granted, the ERP ID field will be hidden from view.

PERMISSION SETUP			
MODULE	Accounts	Search	
PERMISSION ID	NAME	DESCRIPTION	MODULE
428	Add On Call Work Order for Credit Hold Account		Accounts
429	Post ACH Credit		Accounts
431	Edit Account Automatic Payment Settings		Accounts
432	Waste Profile Management		Accounts
435	Tax Region Map		Accounts
439	Blanket Purchase Order Management		Accounts
444	Tax Verification		Accounts
450	Edit Account Division		Accounts
451	Add or Edit - Override Account or Site Surcharge ...		Accounts
453	Clone Site and Services		Accounts
463	Quick Add Account & Bundle		Accounts
478	Edit Account SAP ID		Accounts
479	View or Edit - Account Default Rates		Accounts

ID	ROLE	ACTIVE USERS	ROLE NAME

Division & Service Region

The Default ERP Account ID has been moved from the Division Setup screen to the Service Region Setup screen.

SERVICE REGION SETUP					
+		DIVISION	ALL	?	
ID ↑	NAME	DIVISION	REQUIRE SURCHARGE GROUP	DEFAULT SURCHARGE GROUP	
1001	WOODCREEK	DAYTON	Yes	Fuel Surcharge - Residential	
1002	PARKS			Residential	
1003	ATASC			Residential	
1004	ATASC			Residential	
1005	KINGS			Residential	
1006	HUMB				
1007	ATASC			Residential	
1008	OAKS			Residential	
1009	STILLV			Residential	
1010	KINGV			Residential	
1011	LIBERT			Residential	
1012	THE CO			Residential	
1013	PINEY			Residential	
1014	ENCLA			Residential	
15	15			Residential	
BUNN	Bunn			Commercial	
CORPUS	CORPU			Residential	
DAYTON	DAYTC			Residential	
DeleteMe	Delete			Residential	
DELT	Delete			Residential	
Hearne_SR	Hearn			Commercial	
HOUSTON	HOUST			Commercial	
LA	LOS A			Commercial	
OC	Orang			Commercial	
PRLD_MUNI	PEARL			Fee	
QASVCREG	QA Se			Commercial	
QAWASTE	QA Waste	OPEN MARKET	NO	Fuel Surcharge - Residential	

ADD SERVICE REGION

SERVICE REGION ID:

NAME:

DIVISION:

REQUIRE SURCHARGE GROUP:

DEFAULT SURCHARGE GROUP:

GL SEGMENT:

DEFAULT BUNDLE ORDER SALES REP:

PARENT SERVICE REGION:

NEIGHBORHOOD:

REQUIRE TAX REGION:

ERP LABEL:

DEFAULT ERP ACCOUNT ID:

ALLOW PORTAL SELF REGISTRATION:

ACTIVE:

SAVE

Pathway: Setup > System > Permission | Setup > Services > Service Region

Broker Account Permissions (Setup) - New Permissions Added for Broker Accounts and Updates to Site Division Access (18051)

Broker Permissions

Four new broker permissions have been added to the Accounts module:

Permission	Description
Add Site to Broker Account (474)	Displays the Site, Clone Site, and Split Site into New Account menu items for accounts with the 'Broker' Account Class Type. Also controls access to the 'Add' option in the Site Search window.
Edit Site on Broker Account (475)	Displays the site's 'Edit' right-click option for accounts with the 'Broker' Account Class Type. To edit the site, users must also have the 'Edit Non-Prospect Site' permission.
Add or Edit Active Services on Broker Account (476)	Displays the 'Active Services' option in the account menu, calendar right-click menu and the Site Service 'Add' button for accounts with the 'Broker' Account Class Type.
Add On Call Work Order for Broker Account (477)	Displays the 'Create On Call Order' option in account menu, calendar right-click menu and site service right-click menu for accounts with the 'Broker Account Class Type.

PERMISSION SETUP			
MODULE	Accounts		Search
PERMISSION ID	NAME	DESCRIPTION	MODULE
432	Waste Profile Management		Accounts
435	Tax Region Map		Accounts
439	Blanket Purchase Order Management		Accounts
444	Tax Verification		Accounts
450	Edit Account Division		Accounts
451	Add or Edit - Override Account or Site Surch...		Accounts
453	Clone Site and Services		Accounts
463	Quick Add Account & Bundle		Accounts
474	Add Site to Broker Account		Accounts
475	Edit Site on Broker Account		Accounts
476	Add or Edit Active Services on Broker Account		Accounts
477	Add On Call Work Order for Broker Account		Accounts
478	Edit Account SAP ID		Accounts
479	View or Edit - Account Default Rates		Accounts

Pathway: Setup > System > Permissions

Account and Site Division Access

The following logic updates have been applied to customer service account and site division access across all account class types:

Account Division Access

1. If the user does not have access to the account's division, the following menu items will be hidden:
 - o Proposal and Contract

- ACH Credit
 - Appointment
 - Manual Charge
 - Refund Request
 - Refund / Rebate Check
 - Task
 - Default Rates
 - External Account
 - Lead
 - Next Invoice Message
 - Vendor Invoice
 - Split Site into New Account
2. If the user does not have access to the account's division, the 'Add' menu icon will be hidden on the Orders, Quotes and Contracts section.

Account AR History Access

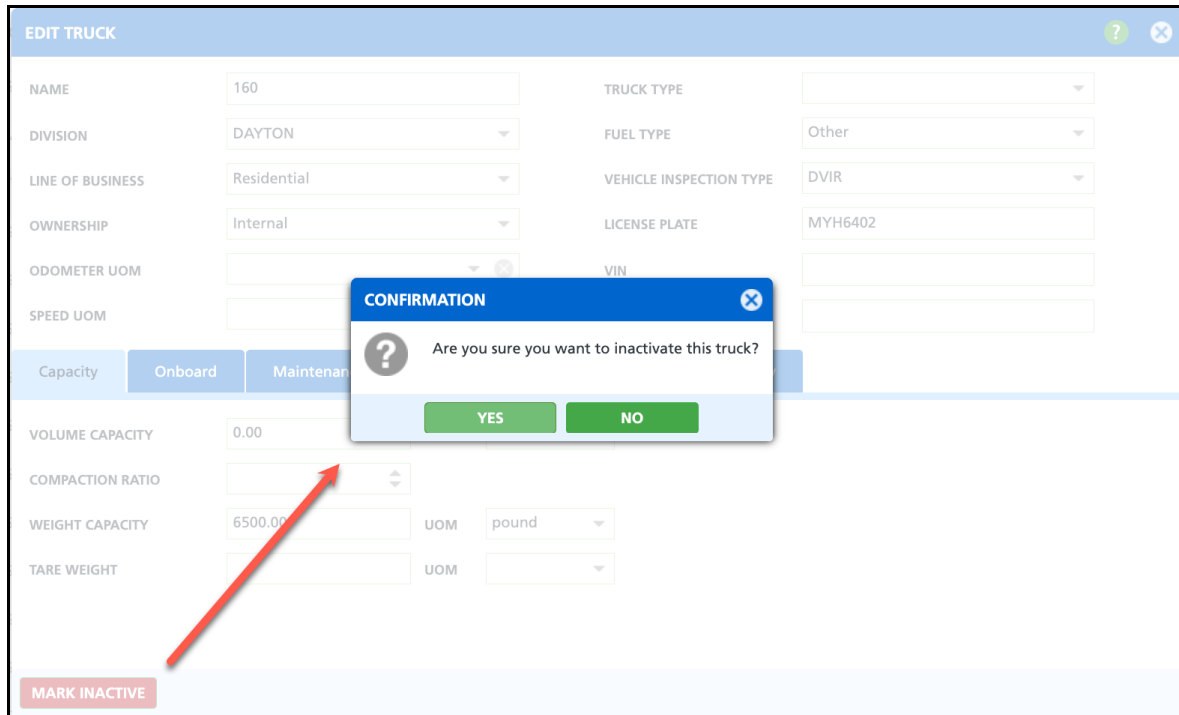
1. If the user does not have access to the account's division, the following are hidden
- Toolbar button options: Invoice, Auto Apply, Balance Write Off and Wallet
 - Right-click options:
 - View Details / Adjust Invoice
 - Auto apply
 - Auto Apply to Next Invoice
 - Import Invoice
 - Record Chargeback
 - Refund Payment
 - Void Payment
 - Reverse/Transfer/Split
 - Reverse Invoice
 - Reverse Adjustment
 - Void / Reverse
 - Convert to Deposit
 - Convert to Payment

Site Division Access

1. If the user does not have access to the Site's division, the following logic applies:
- Menu items: Active Service, On Call Order and Safety Profile are hidden.
 - The *View/Edit Site* right-click options for Site Service are disabled.
 - The 'Add' option for Active Services is hidden.
 - The following Active Services right-click options are hidden:
 - Edit
 - Reverse
 - Transfer
 - Link Parent Service
 - Create On Call Order
 - Add Site Service Discount
 - The following calendar right-click options are hidden:
 - Add Active Service
 - Create On Call Order

Truck (Setup) - 'Mark Inactive' Button Slow to Respond (16756)

The Confirmation popup that appears after selecting 'Mark Inactive' for a truck was previously delayed. The processing logic has been updated to show the popup immediately.

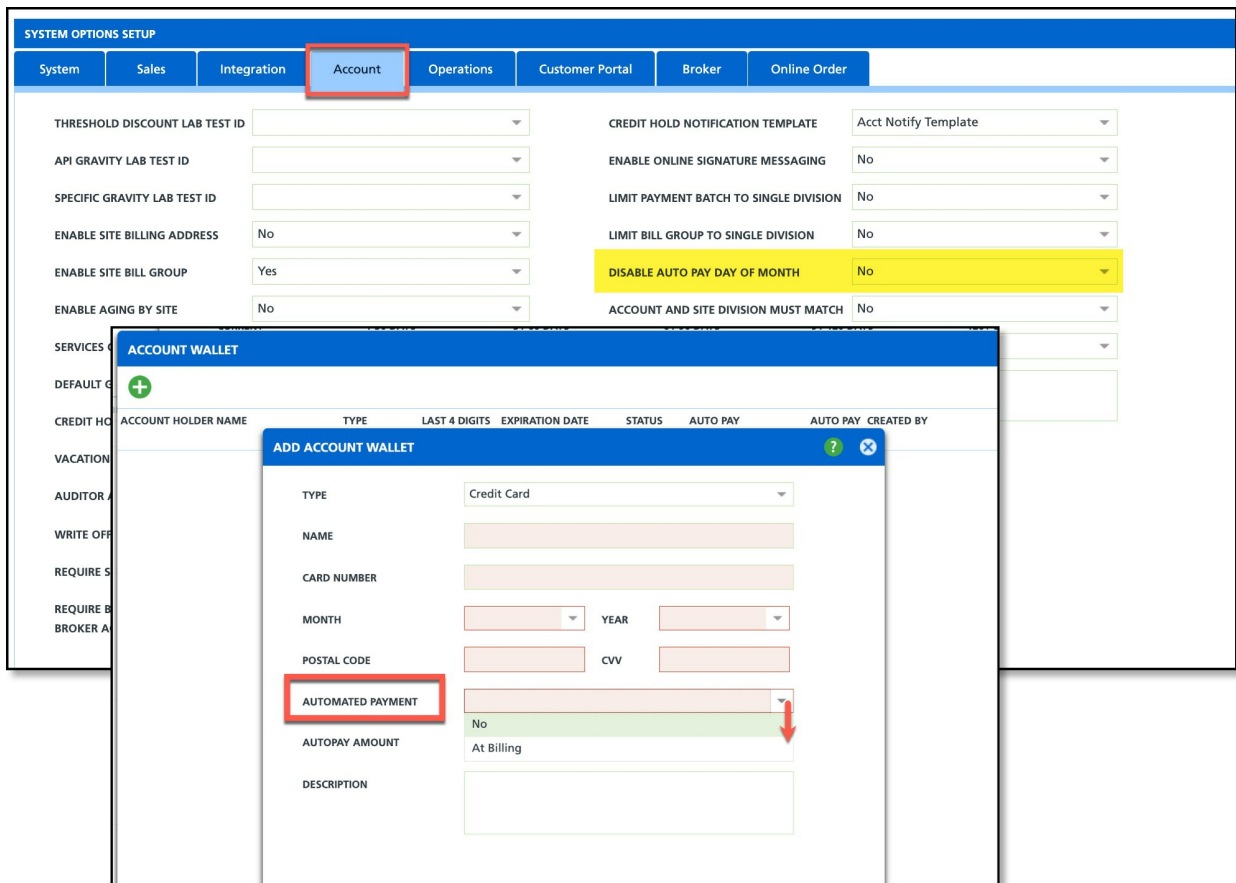


The screenshot shows the 'EDIT TRUCK' interface. The form contains various fields for truck details, including Name (160), Division (DAYTON), Line of Business (Residential), Ownership (Internal), License Plate (MYH6402), and Capacity. A 'MARK INACTIVE' button is located at the bottom left. A confirmation popup is displayed in the center, asking 'Are you sure you want to inactivate this truck?' with 'YES' and 'NO' buttons. A red arrow points from the 'MARK INACTIVE' button to the confirmation popup.

Pathway: *Setup > Operations > Truck*

System Options (Setup) - New Option 'Disable Auto Pay Day of Month' Added (18429, 18430)

A new setting, 'Disable Auto Pay Day of Month', has been added to the Account tab in System Options Setup. When enabled (set to 'Yes'), the 'Scheduled Day' option and 'Day of Month' field are hidden in the Account Wallet in Navusoft and Customer Portal.



Pathway: Setup > System Options > Account [tab]

Division (Setup) - Credit Card Chargeback Notification Template Added (18437)

A "Chargeback Notification Template" drop down field has been added to the **Add/Update Division Setup** screen. When a chargeback is recorded on an account, a notification is automatically sent to the account's billing contacts.

Chargeback templates use the existing notification template type: **Payment Notification (Receipt / Refund / Declined)**, with additional fields (**payment.notification.email**, **payment.chargeback.amount** and **payment.chargeback.note**) added to support chargeback-specific notifications.

?
X

Details
Integrations
Addresses
Credit Card / ACH Processing
Intercompany

Card Not Present	Card Present
ENABLE <input type="text" value="No"/>	PROCESSOR <input type="text" value="None"/>
PROCESSOR <input type="text" value="None"/>	API KEY <input type="text"/>
ENVIRONMENT <input type="text"/>	WAIT FOR TERMINAL TIMEOUT (SEC) <input type="text"/>
API KEY / USER NAME <input type="text"/>	ENABLE NON-INTEGRATED CREDIT CARD TERMINAL <input type="text" value="No"/>
TRANS. KEY / PASSWORD <input type="text"/>	
CREDIT CARD MERCHANT ID <input type="text"/>	
ECHECK/ACH MERCHANT ID <input type="text"/>	

SETTLEMENT TIME	<input type="text" value="-- : -- --"/>
CREDIT CARD BANK ACCOUNT	<input type="text"/>
PAYMENT RECEIPT NOTIFICATION TEMPLATE	<input type="text"/>
DECLINED PAYMENT NOTIFICATION TEMPLATE	<input type="text"/>
PAYMENT REFUND NOTIFICATION TEMPLATE	<input type="text"/>
CHARGEBACK NOTIFICATION TEMPLATE	<input type="text"/> <ul style="list-style-type: none"> CC or ACH Template <li style="background-color: #d9ead3;">Chargeback Declined Payment Template Payment Receipt Payment Refund Payment Refund - Default Subject

Pathway: Setup > System > Division > Credit Card / ACH Processing [tab]

Bill Group (Setup / Accounting) - New Setting Added to Support Anniversary Billing (18812)

In Add/Update Bill Group, when the Frequency is set to Anniversary 4 Week, a new setting, *Bill Unbilled Ended Services Through* is displayed.

ADD BILL GROUP
?
✕

Settings
Notifications

<p>ID <input type="text"/></p> <p>ACTIVE <input type="text" value="Yes"/></p> <p>NAME <input type="text"/></p> <p>DIVISION <input type="text"/></p> <p>TYPE <input type="text"/></p> <p>FREQUENCY <input type="text" value="Anniversary 4 week"/></p> <p>INVOICE FORMAT <input type="text"/></p> <p>BILLING EXPORT FORMAT <input type="text"/></p> <p>CUSTOMER PORTAL URL <input type="text"/></p> <p>MESSAGE DUE IN PAST 1-30 DAYS <input type="text"/></p> <p>MESSAGE DUE IN PAST 30-60 DAYS <input type="text"/></p> <p>MESSAGE DUE IN PAST 61-90 DAYS <input type="text"/></p> <p>MESSAGE DUE IN PAST 91 DAYS <input type="text"/></p> <p>CUSTOM 1 <input type="text"/></p> <p>CUSTOM 2 <input type="text"/></p> <p>WORK ORDER HEADER TEXT <input type="text"/></p> <p>SURCHARGE HEADER TEXT <input type="text"/></p> <p>FINANCE CHARGES TEXT <input type="text" value="Finance Charges"/></p>	<p>INVOICE EMAIL FROM <input type="text"/></p> <p>PRINT SEQUENCE <input type="text" value="Invoice Number"/></p> <p>INVOICE LOGO <input type="text" value="Select Image"/> <input type="button" value="BROWSE..."/></p> <p>UPLOADED INVOICE LOGO <input type="text"/></p> <p>INVOICE LOGO 2 <input type="text" value="Select Image"/> <input type="button" value="BROWSE..."/></p> <p>UPLOADED INVOICE LOGO 2 <input type="text"/></p> <p>BILLING AUTO PAY PROCESS DATE <input type="text"/></p> <p>SCHEDULED AUTO PAY TIME <input type="text" value="12 : 00 : 00 . 000 AM"/></p> <p>PAPER BILL FEE CHARGE CODE <input type="text"/></p> <p>PAPER BILL FEE (PER INVOICE) <input type="text"/></p> <p>MINIMUM INVOICE AMOUNT TO BE NOTIFIED <input type="text" value="0.00"/></p> <p>MINIMUM ACCOUNT BALANCE TO BE NOTIFIED <input type="text" value="0.00"/></p> <p>ONE INVOICE PER <input type="text" value="Disabled"/></p> <p>DISABLE AUTOMATIC BILLING BATCH CREATION <input type="text" value="No"/></p> <p>DISABLE EMAIL INVOICE AS AN ATTACHMENT <input type="text" value="No"/></p> <p>BILL UNBILLED ENDED SERVICES THROUGH <input type="text" value="Service End Date"/></p>
--	---

Pathway: Setup > Accounting > Bill Group

Surcharge Setup (Setup/Services) - New Display Columns Added (18813)

The following new columns have been added to the Surcharge Setup screen:

1. Type
2. Taxable
3. Tax Class
4. Exclude from Revenue Collection
5. Franchise Fee

SURCHARGE SETUP										
SETUP > SERVICES > SURCHARGE										
ID	NAME	SURCHARGE CLASS	TYPE	RATE INDEX	GL ACCOUNT	TEMPORARY SERVICE GL ACCOUNT	TAXABLE	TAX CLASS	EXCLUDE FROM REVENUE CALCULATION	FRANCHISE FEE
1004	Dayton Franchise Fee	Franchise Fee	Percentage %		Franchise Fees Payable		No		Yes	Yes
1005	Liberty Franchise Fee		Percentage %		Franchise Fees Payable		Yes		Yes	Yes
1007	CCMSW Fee - Yardage		Per Cubic Yard		MSW Fees Payable		Yes		Yes	Yes
1008	Pearland Franchise Fee		Percentage %		Franchise Fees Payable		Yes		Yes	Yes
1009	Fuel Surcharge-Commercial	Fuel Surcharge	Percentage %		Service Income: Fuel ...		Yes		No	No
1010	Fuel Surcharge-Residential		Percentage %		Service Income: Fuel ...		Yes		No	No
1011	Fuel Surcharge-Roll Off		Percentage %		Service Income: Fuel ...	TEMP Roll Off Reven...	No		No	No
1012	Fuel Surcharge 10%	Fuel Surcharge	Percentage %		Service Income: Fuel ...		Yes		No	No
1013	Fuel Surcharge 15%		Percentage %		Service Income: Fuel ...		Yes		No	No
1014	Fuel Surcharge 9%	Fuel Surcharge	Percentage %		Service Income: Fuel ...		Yes		No	No
1015	Fuel Surcharge-Rate Index		Rate Index %	DOE Fuel Index			No		No	No
1016	Environmental Surcharge		Percentage %		Service Income: Fuel ...		No		No	No
1017	FLATFEE		Flat		Accounts Receivable		No		No	No
1018	Per Disposal Ton		Per Disposal Ton		Accounts Receivable		No		No	No
1019	SURTEST	Fuel Surcharge	Flat		Accounts Receivable		No	Equipment	No	No

Pathway: Setup > Services > Surcharge

System (Setup) - Updates to Support EDI Billing Export Format (18578)

A new billing export option, *WM EDI Format (Standard)*, has been added to the *Billing Export Format* field in Bill Group setup. To support this format, an *EDI Company Name* field is now available on the *Integration* tab in System Options Setup, and a new *Integrations* tab has been added to the Division Setup screen.

The image shows two overlapping screenshots from a software application. The top screenshot is the 'SYSTEM OPTIONS SETUP' screen, with the 'Integration' tab selected. The 'EDI COMPANY NAME' field is highlighted in yellow. The bottom screenshot is the 'ADD DIVISION' screen, with the 'Integrations' tab selected and highlighted with a red box. A 'SAVE' button is visible at the bottom of the 'ADD DIVISION' screen.

SYSTEM OPTIONS SETUP							
System	Sales	Integration	Account	Operations	Customer Portal	Broker	Online Order
ENABLE ERP INTEGRATION		SAP					
GL EXPORT FORMAT		Great Plains					
BI INTEGRATION DATABASE							
UPS ACCESS KEY							
USPS ACCESS KEY							
ERP ID LABEL		ERP LABEL					
EDI COMPANY NAME							
EXTERNAL INVOICE S3 FOLDER							
EXTERNAL INVOICE TASK TYPE							
EXTERNAL INVOICE APPROVAL EMAIL							

ADD DIVISION				
Details	Integrations	Addresses	Credit Card / ACH Processing	Intercompany
ENABLE INTEGRATION				
LOCK BOX IMPORT FORMAT				
LOCK BOX NON-MATCHING DEFAULT ACCOUNT				
MAILCHIMP API KEY				
MAILCHIMP LIST ID				
CAMERA EXTERNAL ID				
ERP LABEL				
EDI COMPANY ID				

Pathway: Setup > System > System Options | Setup > System > Division | Setup > Accounting > Bill Group

Roles (Setup/System) - Permission Settings Not Preventing Access to Residential Mode (18362)

An issue with permission 391, which controls driver access to Residential Mode in NavuNav, has been resolved. Previously, drivers without this permission were still able to access Residential Mode.

ROLE SETUP											SETUP > SYSTEM > ROLE
ROLE ID	ROLE NAME	EDIT SERVICE PAST DAYS LIMIT	AUTOMATICALLY POST ADJUSTMENT LIMIT	ADJUSTMENT APPROVAL LIMIT	REFUND APPROVAL LIMIT	MAX DEFAULT RATE DISCOUNT	AUTHORIZED PERMISSIONS	NOT AUTHORIZED PERMISSIONS	NEW PERMISSIONS	ACTIVE USER COUNT	DOCUMENTATION VIEW SCORE
1	Navusoft Admin and Support	99	\$ 10.00	\$ 10.00	\$ 1,000.00		372	1	0	0	
2	Sales Manager	7	\$ 100.00	\$ 0.00		5%	172	155	46	1	0%
3	Sales Representative	7	\$ 4.00	\$ 0.00		7%	92	236	45	6	0%
4	Driver	1	\$ 0.00	\$ 0.00			18	309	46	96	0%
5	Controller	0	\$ 0.00	\$ 0.00			97	230	46	3	0%
1000	Operations Mgr	30	\$ 0.00	\$ 0.00			137	192	44	11	1%
1014	Administrator	90	\$ 500.00	\$ 1,000.00	\$ 1,000.00		331	9	33	6	1%
1015	Customer Service Rep	30	\$ 15.00	\$ 15.00	\$ 20.00		110	216	47	10	2%
1016	Dispatcher	30	\$ 10.00	\$ 0.00			153	176	44	8	6%
1017	Billing Mgr	95	\$ 150.00	\$ 2,000.00	\$ 50.00	30%	221	109	43	6	0%
1018	Customer Service Manager	65	\$ 100.00	\$ 100.00			151	178	44	1	9%

Permissions		Users	
AUTHORIZATION	All	EXPAND ALL	COLLAPSE ALL
		391	
PERMISSION NAME	PERMISSION ID	AUTHORIZATION STATUS	
Accounting			
Accounts			
Dashboard			
Database			
Help			
Operations			
NavuNav Driver \ Residential mode	391	Authorized	
Reports			
Sales			

Pathway: Setup > System > Role

[75.1 Release] Surcharge Group (Setup) - Support for Nested Surcharge Levels Added (18340) [New Feature]

A new **Level** column has been added to the **Surcharges** tab in **Surcharge Group Setup** to allow surcharges to be nested, applying one surcharge on top of another. By default, new surcharges are assigned **Level 1**. To apply a surcharge on all Level 1 surcharges in the group, users must manually set the nested surcharge to **Level 2**.

Setup to Consider

- For a nested surcharge to apply, the surcharge must also be enabled on the Surcharges tab for the Service Code being billed.
- The rate for a nested surcharge is determined by the rate defined for that surcharge in Surcharge Setup.

Example

In the example below, the nested surcharge **LA Franchise Fee (10%)** was applied as a separate line item, calculated based on the invoice amount for the **Fuel Surcharge 15%**, surcharge.

SURCHARGE GROUP SETUP SETUP > SERVICES > SURCHARGE GROUP

INVOICE ADJUSTMENT - 915961 - 7/31/25 - \$ 133.50 - CREATED BY ALIENA SOMERS ON 7/22/25 12:33 PM

REASON CODE: PERIOD: 2025-07 NOTE:

CREDIT ENTIRE INVOICE

DATE	SITE ID ↑	SITE NAME	WO #	QUANTITY	DESCRIPTION ↑	INVOICE AMOUNT	PREVIOUS ADJUSTMENTS	PENDING ADJUSTMENTS	REJECTED ADJUSTMENTS	ADJUSTMENT AMOUNT
07/01/25 - 07/31/25	49447001	Fawn Doe Rosa		1	2 Yard Trash Service	\$ 100.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
07/31/25	49447001	Fawn Doe Rosa			Fuel Surcharge 15%	\$ 15.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
07/31/25	49447001	Fawn Doe Rosa			LA Franchise Fee	\$ 10.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
07/31/25	49447001	Fawn Doe Rosa			LA Franchise Fee	\$ 1.50	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
07/31/25	49447001	Fawn Doe Rosa		1	Paper Bill Fee - Com... 915961	\$ 7.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00

Fuel Surcharge by Index: Yes
Surcharge Multi Levels: Yes

Surcharges

NAME ↑	TYPE	TAXABLE	TAX CLASS	EXCLUDE FROM REVENUE CALCULATION	FRANCHISE FEE	LEVEL
Fuel Surcharge 15%	Percentage %	Yes		No	No	Level 1
LA Franchise Fee	Percentage %	No		No	Yes	Level 2

Pathway: Setup > Services > Surcharge Group

[75.1 Release] Document Type Setup (Setup) - Enhancements to Screen (18766)

The Document Type Setup screen has been updated to allow settings to be edited directly from the grid. Previously, changes could only be made through the Update Document Type popup editor, accessed by double-clicking the document type row.

Only the highlighted columns can be edited from the grid.

DOCUMENT TYPE SETUP SETUP > DOCUMENT FORMATS

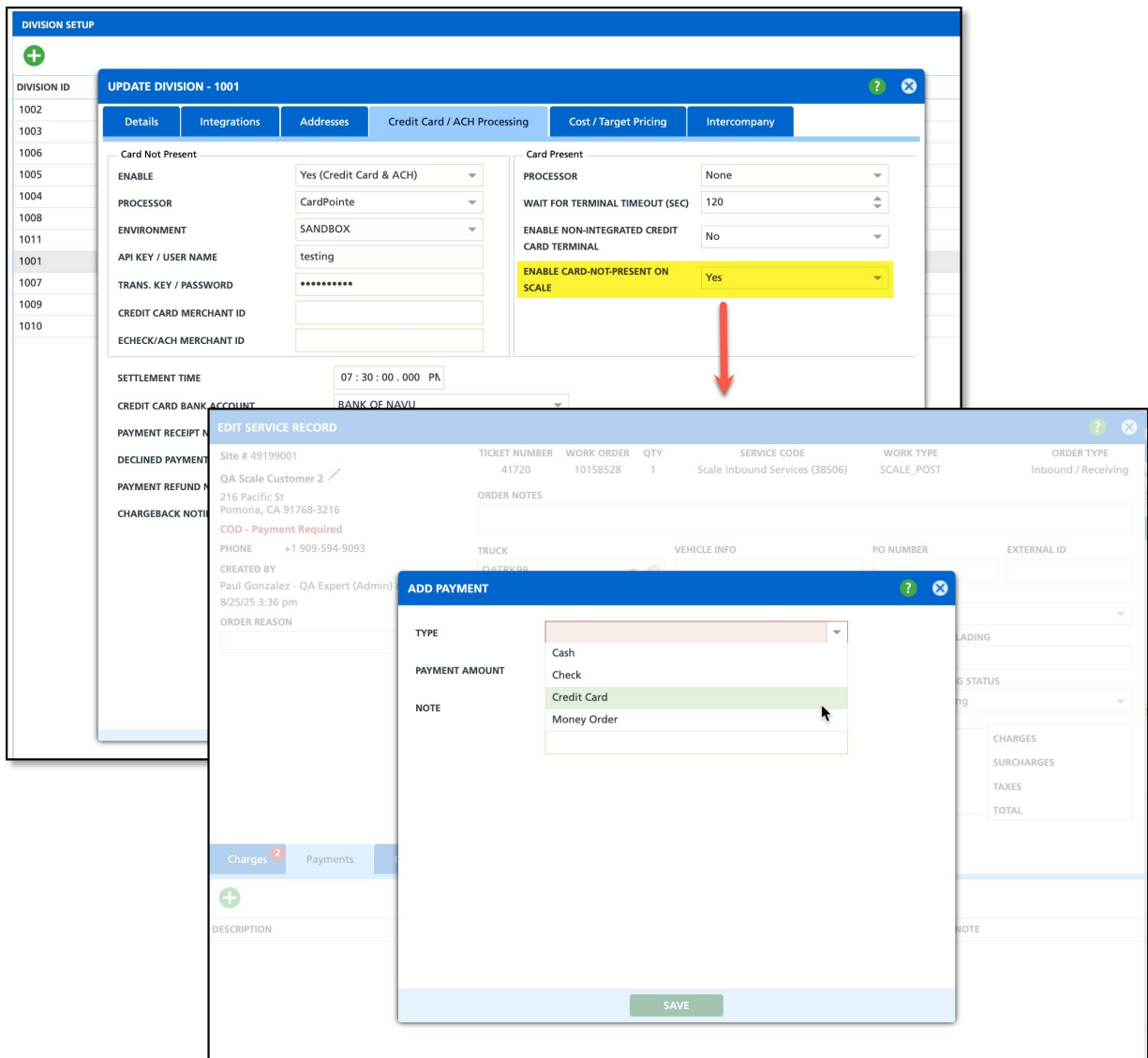
FORM TYPE: All

ID ↑	NAME	FORM TYPE	REASON CODE	IS RENEWAL TYPE	IS TEMP	PRE-AUTHORIZATION	APPROVAL	CHECK LIST TYPE	ACTIVE
1	A-New Service	Proposal	ADD-Add Svc - New Service	No	No	Not Required	Require Review & Approval for al...	Inspection	Active
11	A-New Service-noPreAuthAuto a...	Service Contract	ADD-Add Svc - New Service	No	No	Not Required	Require Approval for all Docume...	Inspection	Active
21	A-New Service	Services Change Form	ADD-Add Svc - New Service	No	No	Not Required	No Review or Approval Required		Active
36	Chg Svc-Price Decrease	Proposal	CHG-Price Decrease	Yes	No	Not Required	No Review or Approval Required		Active
48	Chg Svc-Price Decrease	Service Contract	CHG-Price Decrease	Yes	No	Not Required	Require Approval for all Docume...		Active
60	Chg Svc-Price Decrease	Services Change Form	CHG-Price Decrease	Yes	No	Not Required	No Review or Approval Required		Active
78	Chg Svc-Price Increase	Proposal	CHG-Price Increase	Yes	No	Require / one authorization for D...	No Review or Approval Required		Active
79	Chg Svc-Price Increase	Service Contract	CHG-Price Increase	Yes	No	Not Required	No Review or Approval Required		Active
80	Chg Svc-Price Increase	Services Change Form	CHG-Price Increase	Yes	No	Not Required	No Review or Approval Required		Active
81	Chg Svc-Service Decrease	Proposal	CHG-Service Decrease	Yes	No	Not Required	No Review or Approval Required		Active
82	Chg Svc-Service Increase	Proposal	CHG-Service Increase	Yes	No	Not Required	No Review or Approval Required		Active
83	Chg Svc-Service Increase	Service Contract	CHG-Service Increase	Yes	No	Not Required	No Review or Approval Required		Active
84	Chg Svc-Service Decrease	Service Contract	CHG-Service Decrease	Yes	No	Not Required	No Review or Approval Required		Active
85	Chg Svc-Service Decrease	Services Change Form	CHG-Service Decrease	Yes	No	Not Required	No Review or Approval Required		Active
86	Chg Svc-Service Increase	Services Change Form	CHG-Service Increase	Yes	No	Not Required	No Review or Approval Required		Active
87	End Svc-End Svc	Services Change Form	END-End Service	No	No	Not Required	No Review or Approval Required		Active

Pathway: Setup > Document Formats > Type

[75.1 Release] Division (Setup) - New Credit Card Setting for Scale (18972)

A new 'Enable Card-Not-Present on Scale' setting has been added to the Credit Card/ACH Processing tab in Division Setup. When enabled, 'Credit Card' will be available as a payment option on the Add Payment screen for Inbound and Outbound work orders.



Pathway: Setup > Division > Credit Card / ACH Processing

[75.1 Release] User (Setup) - Updates to Alert Notifications (17793)

The following updates have been applied to the alert system in Navusoft that extends to multiple screens:

Add/Edit User and User Profile

1. An *Alert Notification Method* grouping has been added with options for *In Application Popup*, *Text Message*, and *Email*. By default, new users are set to *In Application Popup* and *Email*.
 - o If **In Application Popups** is not selected, users will not see the blue notification popup alerts.
 - o If **Text Message** is selected, text messages will be sent with a character limit of 320.
2. A new setting, *Send Daily Activity Summary Email*, has been added and is selected by default for new users. When enabled, users receive an email snapshot of their activities from the Recent Activity home screen.

ADD USER

STATUS: Active

FIRST NAME: [Text Field]

LAST NAME: [Text Field]

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

EMAIL: [Text Field]

MOBILE PHONE: [Country Flag] (999) 999-9999

OFFICE PHONE: [Country Flag] (999) 999-9999

TITLE: [Text Field]

DEPARTMENT: [Dropdown]

MANAGER: [Dropdown]

SALES GOAL TYPE: None

EXTERNAL ID: [Text Field]

EXTERNAL_USER_ID: [Text Field]

Alert Notification Method

- In Application Popup
- Text Message
- Email

Send Daily Activity Summary Email

DEFAULT HOMEPAGE: [Dropdown]

ONLINE IMAGE: [Select Image...] **BROWSE...**

Alert History

Alert History has been renamed to *Snoozed Alerts*, and the History tab is no longer available.

SNOOZED ALERTS

DATE	SNOOZED DATE	CREATED BY	MESSAGE
09/08/2025 12:04 pm	09/08/2025 1:07 pm	Aliena Somers - Admin...	Appointment 1467 - Follow Up - is assigned to you. Site: Subway at address 402 N Cascade St, Osceola When: 2025-09-08 01:00 PM Location: Phone Title: Increase Service Frequency or Bin Size - Call

Recent Activity

The following updates have been made to the Activities section of the Recent Activity screen, the Recent Activity popup, and the Activity Calendar:

1. The Activities section now displays **all alerts**, not just those linked to a site. Account-level alerts will show the **account name**.
2. The logic for the Recent Activity popup and the Activity Calendar has been updated to include **both site-level and account-level alerts**.

The screenshot displays a software interface with three main components:

- QUOTES/CONTRACTS:** Lists items like 'Subway A-New Business-From Competitor' and 'Viebrock Associates A-New Business-New Owner'.
- APPOINTMENTS:** Shows dates and times for 'Sep 08 2025 1:00 pm' and 'Sep 09 2025 1:00 pm'.
- ACTIVITIES:** A detailed log of events such as 'Appointment 1467 - Follow Up - is assigned to you.', 'Site Viewed', and 'Proposal Created'.
- RECENT ACTIVITY:** A smaller window showing a condensed view of the activity log.
- ACTIVITY HISTORY CALENDAR:** A calendar view for August and September 2025, showing activity counts (Alerts, Activities, Views) for specific dates and times.

A red arrow points from the 'RECENT ACTIVITY' window to the 'ACTIVITY HISTORY CALENDAR' window, indicating a navigation or relationship between the two views.

[75.1 Release] Bill Group (Accounting/Setup) - Frequency Options Updated (19177)

The following billing frequency options have been removed from the Frequency field in Bill Group Setup:

- Every 2 Weeks
- Twice a Month
- Bi-monthly
- Semi Annual

BILL GROUP SETUP

DIVISION TYPE

ID	NAME	DIVISION	TYPE	FREQUENCY	INVOICE FORMAT
1					
10					
11					
112233					
12					
12223133					
13					
14					
15					
16					
17					
18					
19					
2					
20					
21					
22					
23					
24					
25					
26					
27					
28					

ADD BILL GROUP ? X

Settings Notifications

ID	<input type="text"/>	INVOICE EMAIL FROM	<input type="text"/>
ACTIVE	<input type="text" value="Yes"/>	PRINT SEQUENCE	<input type="text" value="Invoice Number"/>
NAME	<input type="text"/>	INVOICE LOGO	Select Image: <input type="button" value="BROWSE..."/>
DIVISION	<input type="text"/>	UPLOADED INVOICE LOGO	
TYPE	<input type="text"/>	INVOICE LOGO 2	Select Image: <input type="button" value="BROWSE..."/>
FREQUENCY	<input type="text" value="!"/> <ul style="list-style-type: none"> Daily Weekdays Weekly Every 4 Weeks Monthly Quarterly Annually Anniversary 4 week 	UPLOADED INVOICE LOGO 2	
INVOICE FORMAT	<input type="text"/>	BILLING AUTO PAY PROCESS DATE	<input type="text"/>
BILLING EXPORT FORMAT	<input type="text"/>	SCHEDULED AUTO PAY TIME	<input type="text" value="12 : 00 : 00 . 000 AM"/>
CUSTOMER PORTAL URL	<input type="text"/>	PAPER BILL FEE CHARGE CODE	<input type="text"/>
MESSAGE DUE IN PAST 1-30 DAYS	<input type="text"/>	PAPER BILL FEE (PER INVOICE)	<input type="text"/>
MESSAGE DUE IN PAST 30-60 DAYS	<input type="text"/>	MINIMUM INVOICE AMOUNT TO BE NOTIFIED	<input type="text" value="0.00"/>
MESSAGE DUE IN PAST 61-90 DAYS	<input type="text"/>	MINIMUM ACCOUNT BALANCE TO BE NOTIFIED	<input type="text" value="0.00"/>
MESSAGE DUE IN PAST 91 DAYS	<input type="text"/>	ONE INVOICE PER	<input type="text" value="Disabled"/>
CUSTOM 1	<input type="text"/>	DISABLE AUTOMATIC BILLING BATCH CREATION	<input type="text" value="No"/>

Pathway: Setup > Accounting > Bill Group

[75.1 Release] State / Province / Region (System/Setup) - Support for State Maximum Percentage for Credit Card Fees (18342) [New Feature]

A new feature has been released that caps credit card fees at the maximum amount allowed by state requirements. Review the documentation for a full overview of this feature- [State / Province / Region](#)

STATE / PROVINCE / REGION SETUP SETUP > SYSTEM > STATE / PROVINCE / REGION

Wisconsin

STATE ↑	NAME	COUNTRY	MAX CREDIT CARD PROCESSING FEE (%)
WI	Wisconsin		4%

Overrides

UPDATE ACCOUNT CLASS

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

ENABLE CUSTOMER PORTAL PAY PROCESSING FEE

ENABLE MANUAL PAY PROCESSING FEE

ENABLE AUTO PAY PROCESSING FEE

ENABLE ORDER PAY PROCESSING FEE

DISABLE ACCOUNT WALLET

CREDIT CARD PROCESSING FEE TYPE

CREDIT CARD FEE AMOUNT

CREDIT CARD PROCESSING FEE CHARGE CODE

ACH PROCESSING FEE TYPE

ACH FEE AMOUNT

ACH PROCESSING FEE CHARGE CODE

AUTO PAY DECLINED FEE CHARGE CODE

AUTO PAY DECLINED FEE AMOUNT

BILLING AUTO PAY AMOUNT

Pathway: Setup > System > State / Province / Region

Database

Disposal Records (Database Query) - Logic Updated for Truck Name to Display (18392)

An issue has been resolved that prevented the display of Truck Name for the Disposal Records query. Truck Name is displayed for disposal tickets with an assigned truck.

Database Query Disposal Records Results - 05/13/2025 2:27:46 pm

39776 records

DISPOSALDATE	DISPOSAL LOCATION ID	WORKORDERNUMBER	QUANTITY	TRUCK NAME	DISPOSAL RECORD NOTE	WORKORDER PO NUMBER	WEIGHT OUT
07/02/2024	1040	8098930	1	2003			10,000
06/22/2021	1011	1954141	0.84	774			
10/18/2022	1008	4910169	1.15	771			
02/08/2023	1023						
11/17/2021	1006						
08/26/2022	1005						
05/31/2022	1005						
08/09/2022	1006						
09/27/2022	1005						
11/10/2022	1005						
09/15/2022	1005						
10/25/2021	1005						
09/27/2021	1006						
09/23/2022	1006						
08/29/2022	1006						

EDIT DISPOSAL / SHIPMENT

WO Disposal - 8098930 INTERNAL TICKET # 41332

FACILITY: HOMEBASE EXTERNAL TICKET # STATUS: In Progress

TRANSPORT METHOD: TRUCK (2003 - H675AX) MATERIAL: MSW

NOTES:

Weights

WEIGHT IN	12000	pound	START	07/02/24 Tue	01 : 36 : 00 . 000 PI	QTY	1	ton	DISPOSAL RATE	
WEIGHT OUT	10000	pound	END		-- : -- : --				FEE 1 - FLAT	50.00
NET	2,000.00	pound							FEE 2 - FLAT	60.00
									TOTAL COST	

Pathway: Database > Database Query

Notification History (Database) - Email Notifications Remain in 'Sending' Delivery Status (18128)

An issue has been resolved that prevented the delivery status from updating from 'Sending' to 'Delivered' after an email was successfully sent.

Notification History Email Block List

DIVISION	DATE	NOTIFICATION TEMPLATE TYPE	DELIVERY STATUS	SENT BY	TYPE	TO EMAIL
All	Within Last 7 Days	All	All	All	All	

LOAD

SENT ON	FROM	TO	DELIVERY STATUS	DIVISION
05/14/25 6:01 am ID: 383925	Sent By: House Account	To: PG LouLou Doctor Service (48911001)	Delivered	DAYTON
05/14/25 6:01 am ID: 383922	Sent By: House Account	To: Test Changes Service Reminder Testing - Matthew (48941001)	Delivered	CORPUS
05/14/25 6:01 am ID: 383923	Sent By: House Account	To: Billing Contact 1 Test Service Reminder Testing - Matthew (48941001)	Delivered	CORPUS
05/14/25 6:01 am ID: 383924	Sent By: House Account	To: Nikita Service Reminder Testing - Matthew (48941001)	Delivered	CORPUS
05/14/25 2:00 am	Sent By: House Account		Delivered	

Pathway: Database > Notification History and Block List

Send Bulk Emails (Database) - Filtering Only Pulled Site Level Contacts (18165)

An issue has been resolved in which account-level contacts were not included in the Customer Information entity filter on the Bulk Email screen.

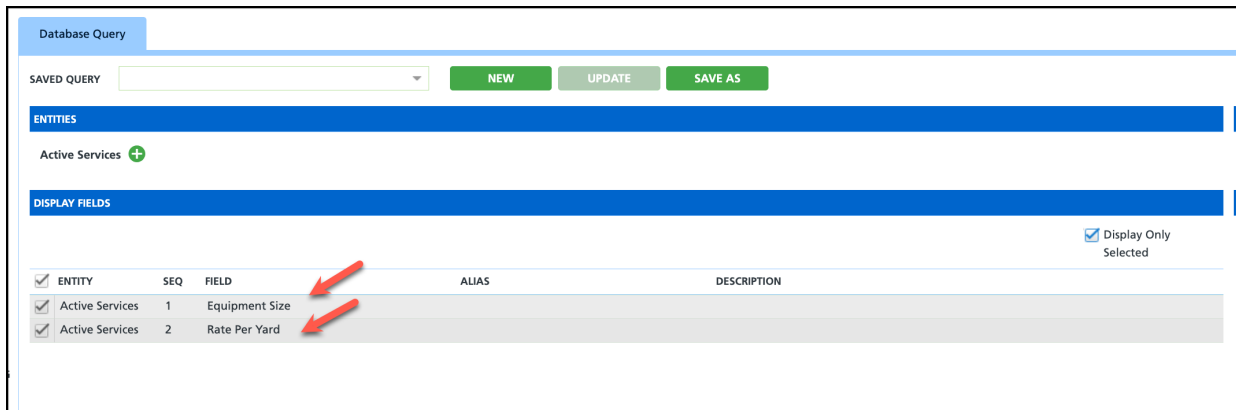
CUSTOMER INFORMATION CONTACT ID	CUSTOMER INFORMATION CONTACT NAME	CUSTOMER INFORMATION CONTACT TITLE	CUSTOMER INFORMATION CONTACT EMAIL	CUSTOMER INFORMATION CONTACT PHONE	CUSTOMER INFORMATION CONTACT ENTITY TYPE
75122	Gate Customer Barbara Daly				Account
75124	Tim Reece		davep@fakeEmail.com		Account
75148	Paul G		pg@fakeEmail.com		Site
75186	John Montgomery				Account
75211	Nikkita Jones		Nikkita Jones@fakeEmail.com		Account
75231	Barbara Daly		Barbara Daly@fakeEmail.com		Account
75281	Barbara Daly				Account
75285	Barbara Daly				Account
75288	Barbara Daly				Account

Pathway: Database > Send Bulk Emails

Database Query (Database) - Update to Active Services Query (18476)

The following field options have been added to the Active Services entity in the Database Query tool:

1. Equipment Size
2. Rate Per Yard

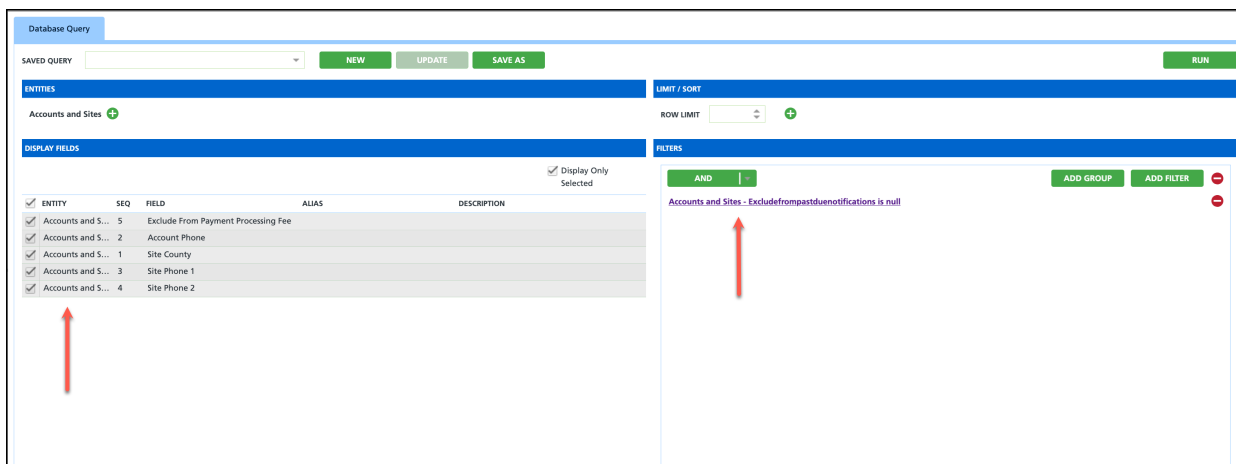


Pathway: Database > Database Query

Database Query (Database) - New Fields and Filter Option Added to Accounts and Sites Query (18473)

The following fields have been added to the Accounts and Sites query in Database Query:

1. Exclude from Payment Processing Fee - also added as a filter option
2. Account Phone
3. Site County
4. Site Phone 1
5. Site Phone 2



Pathway: Database > Database Query

Database Query (Database) - New Fields Added (18827, 18828, 18829, 18830, 18831)

New query fields have been added to Database Query across the following entities:

Active Services Query

- Billed Through Date
- Inactivity Rental Free Days
- Default Destination ID
- Inactivity Rental Rate

Database Query

SAVED QUERY NEW UPDATE SAVE AS

ENTITIES

Active Services +

DISPLAY FIELDS

<input checked="" type="checkbox"/>	ENTITY	SEQ	FIELD	ALIAS	DESCRIPTION
<input checked="" type="checkbox"/>	Active Services	1	Billed Through Date		
<input checked="" type="checkbox"/>	Active Services	4	Inactivity Rental Free Days		
<input checked="" type="checkbox"/>	Active Services	2	Default Destination Id		
<input checked="" type="checkbox"/>	Active Services	3	Inactivity Rental Rate		

Active Services Charge Rates

- No Charge Quantity
- Charge Code Type

Database Query

SAVED QUERY NEW UPDATE SAVE AS

ENTITIES

Active Services Charge Rates +

DISPLAY FIELDS

<input checked="" type="checkbox"/>	ENTITY	SEQ	FIELD	ALIAS	DESCRIPTION
<input checked="" type="checkbox"/>	Active Services ...	1	Nochargequantity		
<input checked="" type="checkbox"/>	Active Services ...	2	Chargecode Type		

Aging

- Average Days to Pay

Database Query

SAVED QUERY NEW UPDATE SAVE AS

ENTITIES

Aging +

DISPLAY FIELDS

<input checked="" type="checkbox"/>	ENTITY	SEQ	FIELD	ALIAS	DESCRIPTION
<input checked="" type="checkbox"/>	Aging	1	Average Days To Pay		

AR History

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

Database Query

SAVED QUERY NEW UPDATE SAVE AS

ENTITIES

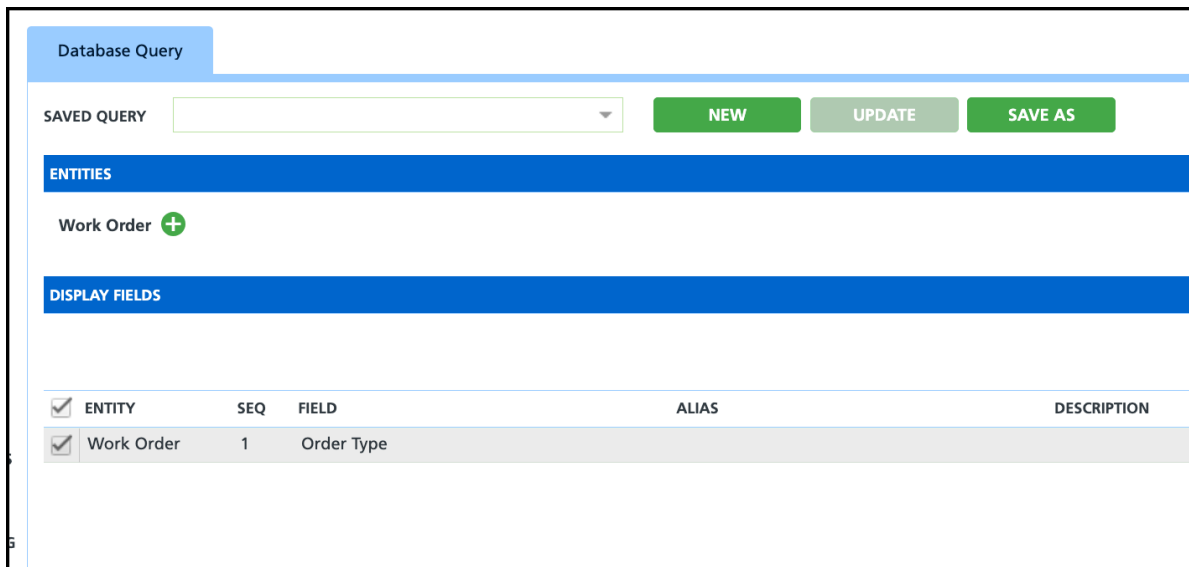
AR History

DISPLAY FIELDS

<input checked="" type="checkbox"/>	ENTITY	SEQ	FIELD	ALIAS	DESCRIPTION
<input checked="" type="checkbox"/>	AR History	7	Site Division Id		
<input checked="" type="checkbox"/>	AR History	6	Site Name		
<input checked="" type="checkbox"/>	AR History	1	Site Address Line1		
<input checked="" type="checkbox"/>	AR History	2	Site Addressline2		
<input checked="" type="checkbox"/>	AR History	3	Site City		
<input checked="" type="checkbox"/>	AR History	4	Site State		
<input checked="" type="checkbox"/>	AR History	5	Site Zip		

Work Order

- Order Type



NavuNav

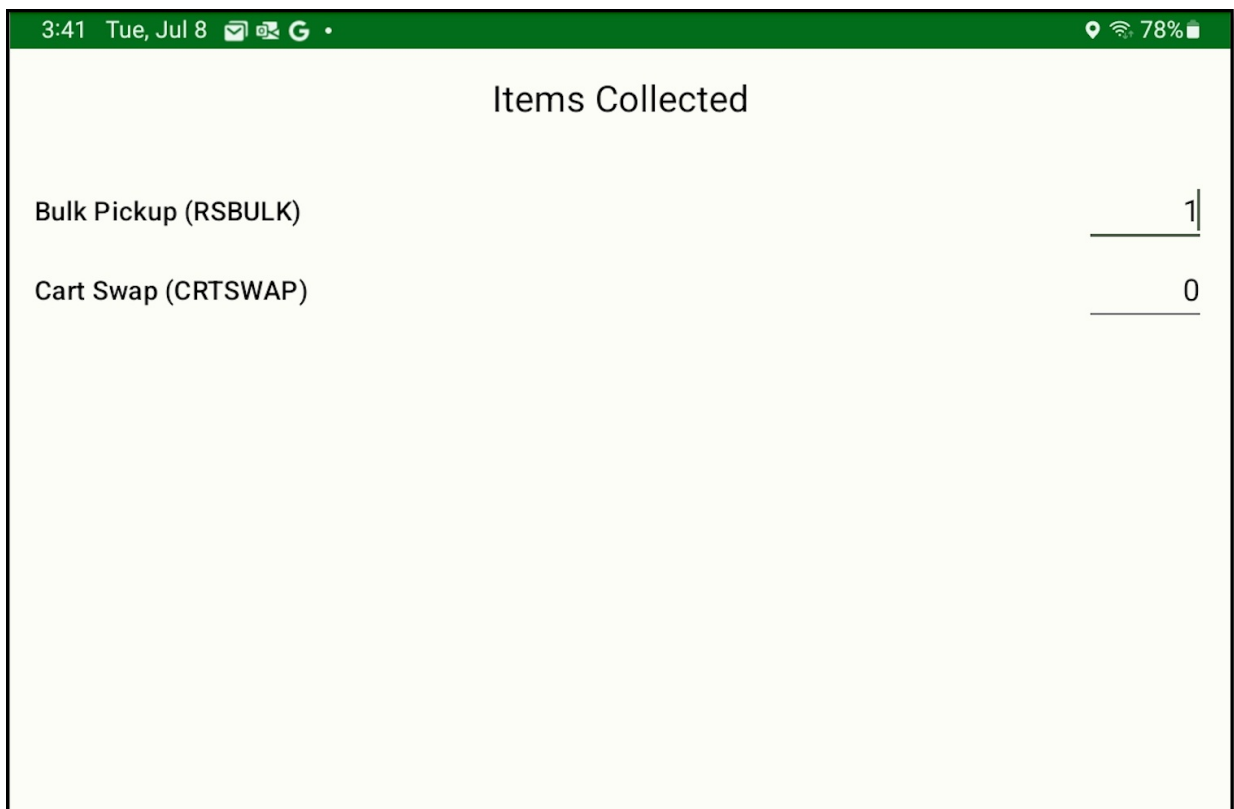
NavuNav (IOS) - Stops Marked With Exception Not Syncing (18122)

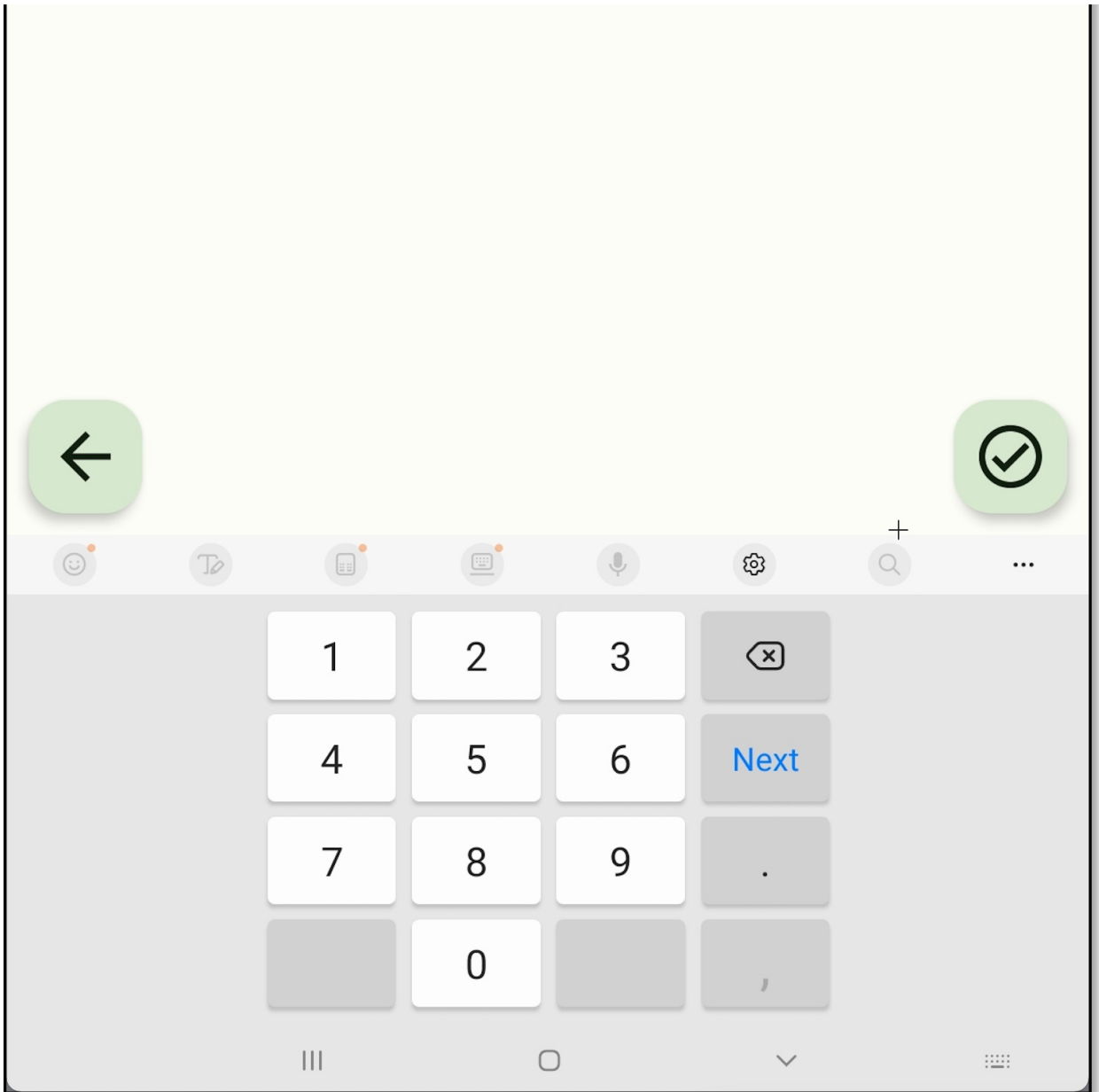
An issue in NavuNav iOS that prevented stops marked with an Exception from syncing back to Dispatch has been resolved.

Pathway: *Operations > Dispatch*

NavuNav (Android) - Return to List Updated (18377)

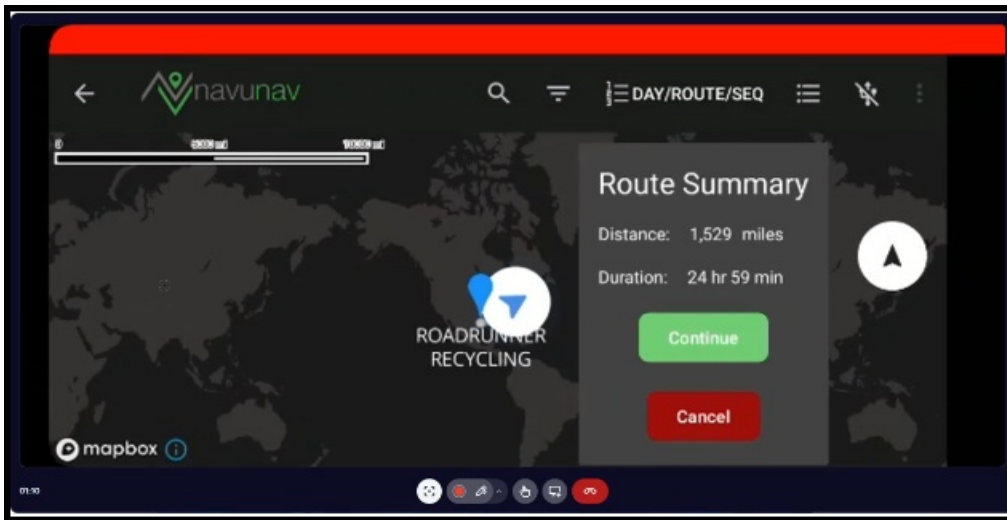
The issue that prevented NavuNav users from returning to the route stop list after entering values in the Items Collected screen has been resolved.





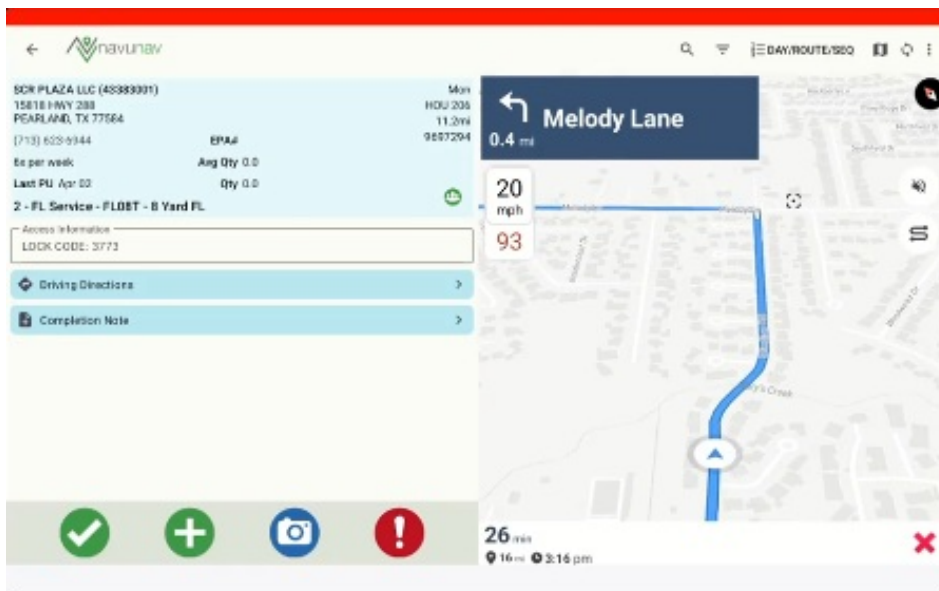
NavuNav (Android) - Phone Screen Size Compatibility Updated (18721)

A UI issue specific to phone screen size, where the Route Summary window was cut off and Driving Directions failed to open the map screen with the Route Summary, has been resolved. Both display and navigation functions perform as intended.



NavuNav (Android) - Turn By Turn Calculations Not Recalculating (18735)

When using the Driving Directions, and the driver went off route, the turn by turn driving directions would not recalculate. This has been resolved.



NavuNav (Android) - Logic Updated to Service Record Status Change and the Scheduled Date (17006)

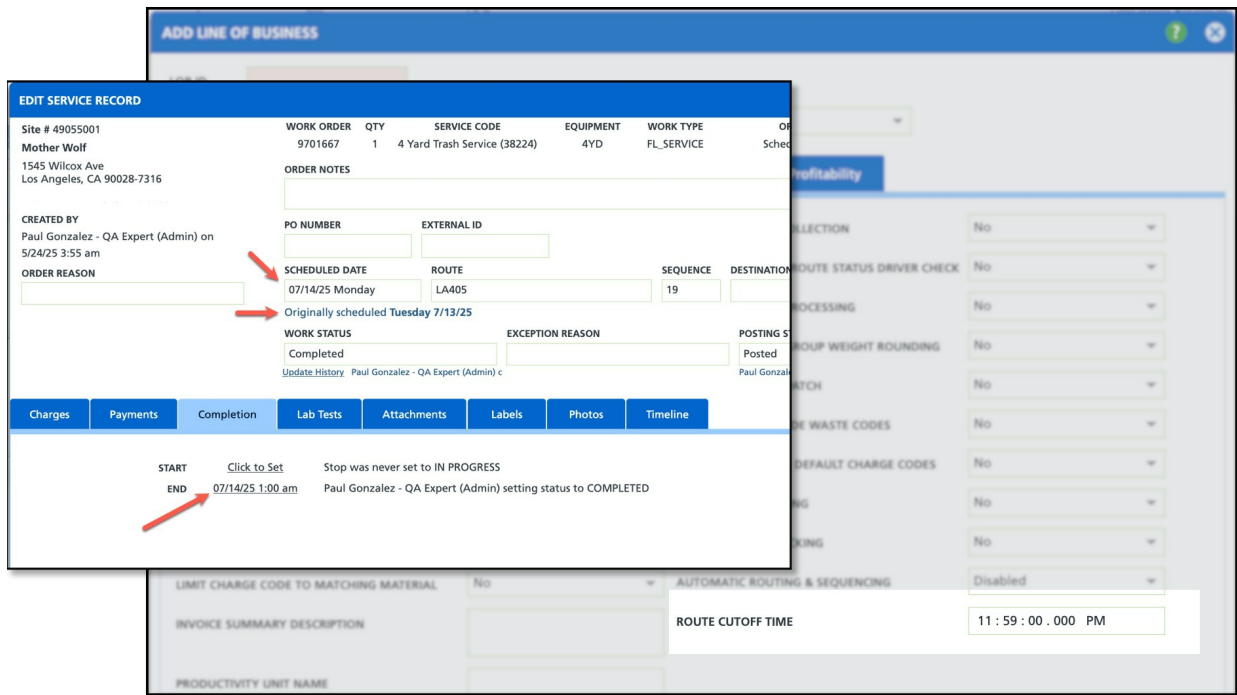
When a driver completes a stop after the **Route Cutoff Time** set in the Line of Business, the **Scheduled Date** is set to **Completion Date Time plus one day**.

Basic Scenario:

In the example below, the original scheduled date was **7/13/25**, and the **Route Cutoff Time** was set to **11:59 PM**. The service was completed around **1:00 AM on 7/14/25**, the **Scheduled Date** was updated to **7/14/25**.

Scenario using Completion Date Time +1 Day

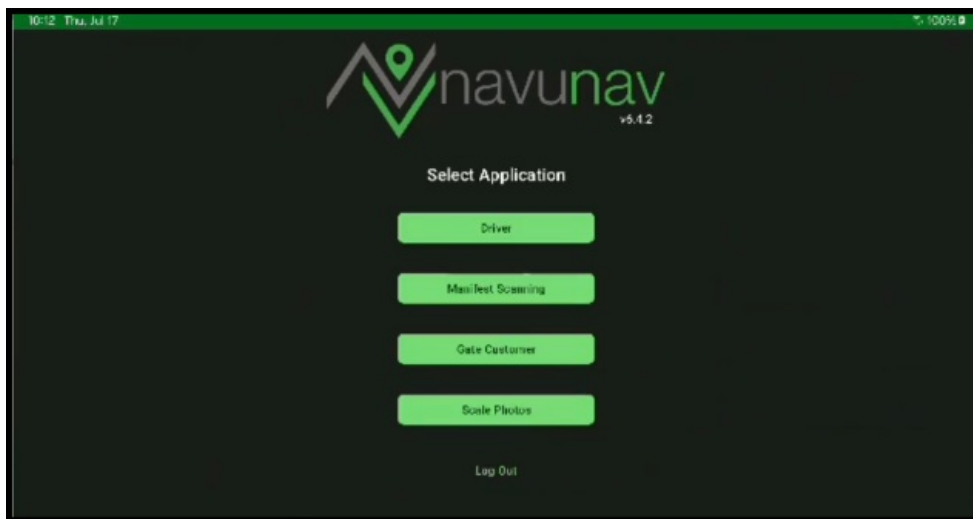
In this scenario, if the original Scheduled Date was **7/13/25**, and the Route Cutoff Time was set to **10:00 PM**, and service was completed at **11:00 PM on 7/13/25**—which was after the route's cutoff time—the Scheduled Date will be updated to **7/14/25**, with the Originally Scheduled Time noted.



Pathway: Setup > Services > Line of Business

NavuNav (Android) - Dark Mode Crashing App (18560)

An issue has been resolved that caused the app to crash when loading the stop list while in dark mode.



Pathway: NavuNav

NavuNav (Android) - VIP Status Added (18302) [New Feature]

A new 'VIP' priority indicator has been added to the Add and Edit Site screens, to designate service locations with VIP status. When selected, this indicator will appear on the Customer Service screen, the Services List in Dispatch, and on the driver app. Expand the images below to see where dispatchers and drivers will see the VIP status icon.

49315001 **Viebrock Associates** Active

1 of 1 2668 VIEBROCK DR OSCEOLA, WI 54020-4042 Active

DIVISION QAWASTE
 ACCOUNT MGR Aliena Somers - Admin-NS (Sales)
 CLASS RESIDENTIAL
 BILL GROUP Annual Billing
 ADVANCE - ANNUALLY Billed Thru Date Jul 31, 2025

DIVISION QAWASTE
 SERVICE REGION Delete Me
 SALES REP Aliena Somers - Admin-NS (Sales)
 PO NUMBER 4321 - Site Level
 SOURCE Call In
 GENERATOR Small Quantity Generator

TOTAL
 61-90 91-120 120+
 0.00 0.00 0.00

EDIT SITE

Basic Settings Billing Settings BIC Profile Required Capabilities

NAME Viebrock Associates DIVISION QAWASTE
 NAME 2 SERVICE REGION Delete Me
 ADDRESS LINE 1 2668 VIEBROCK DR TAX REGION
 ADDRESS LINE 2 ORIGIN
 CITY/STATE/POSTAL CODE OSCEOLA WI 54020-4 SOURCE Call In
 PHONE 1 (999) 999-9999 Office SALES REP Aliena Somers - Admin-NS (Sales)
 PHONE 2 (999) 999-9999 SITE CLASS
 OLD ID GENERATOR Small Quantity Generator
 PO# 4321 - Site Level EPA
 SIGNATURE REQUIRED LEED REPORTABLE **VIP** STATE ID
 NOTE
 WARNING ON OPEN
 ACCESS INFORMATION
 BUSINESS HOURS / SERVICE WINDOW

SAVE

PENDING
 4183 Proposal
 TOTAL RECURRING \$ 48.00

EVENTS

DATE	EVENT
Jun 30	TUE
Jul 1	
Jul 7	
Jul 8	
Jul 14	
Jul 15	
Jul 21	
Jul 22	
Jul 28	
Jul 29	
Jul 30	
Jul 31	
Aug 1	
Aug 2	

Services List (Dispatch)

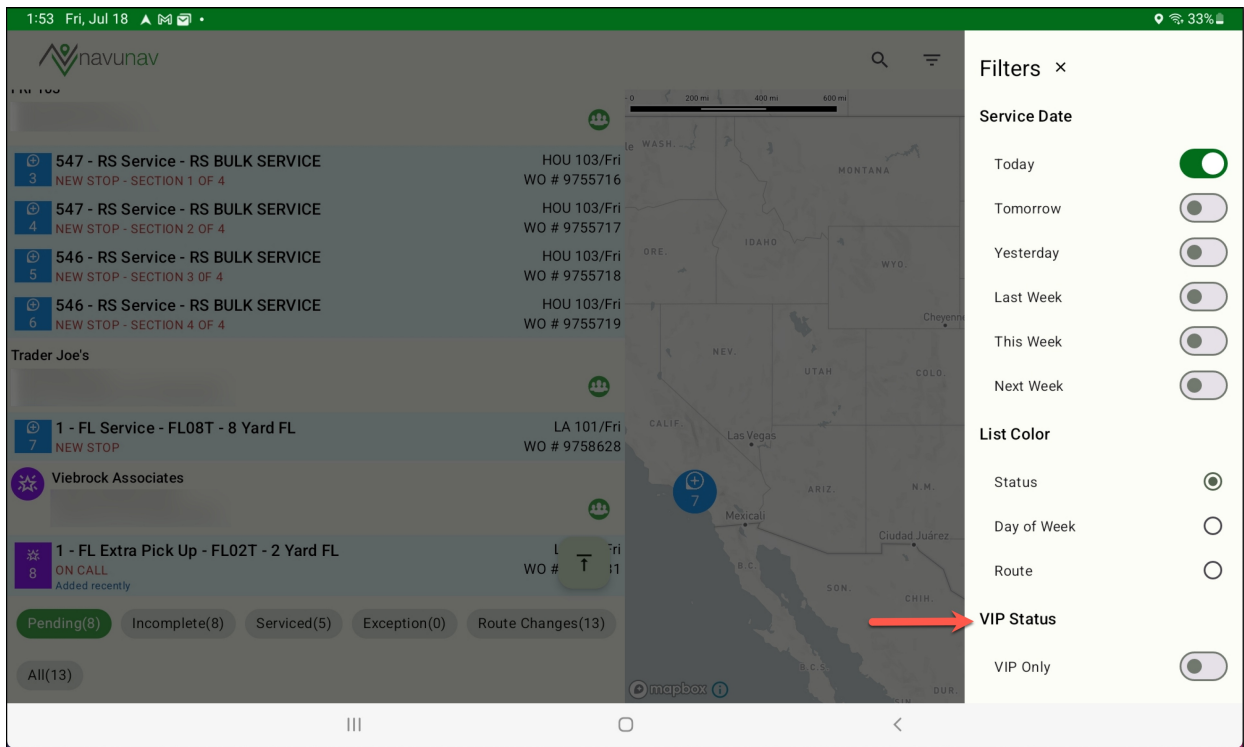
SERVICES LIST

Dispatch Select Print Format PRINT COMPLETED VIP (1) Search

ROUTE	SEQ ↑	ORDER NOTE	SITE	SCHEDULED DATE ↑	CREATED ON	WO#	WO TYPE	SERVICE TYPE	QTY	EQUIPMENT	PHOTOS
LA 101			48986001 Trader Joe's 613 Mission St, South Pasadena	Fri 7/18/25	6/3/25 3:55am	9758628	Scheduled Service	FL Service	1	8 Yard FL	
LA 101			49315001 Viebrock Associates 2668 VIEBROCK DR, OSCEOLA	Fri 7/18/25	7/18/25 1:52pm	9971131 PO# 4321 - ...	On Call	FL Extra Pick Up	1	2 Yard FL	

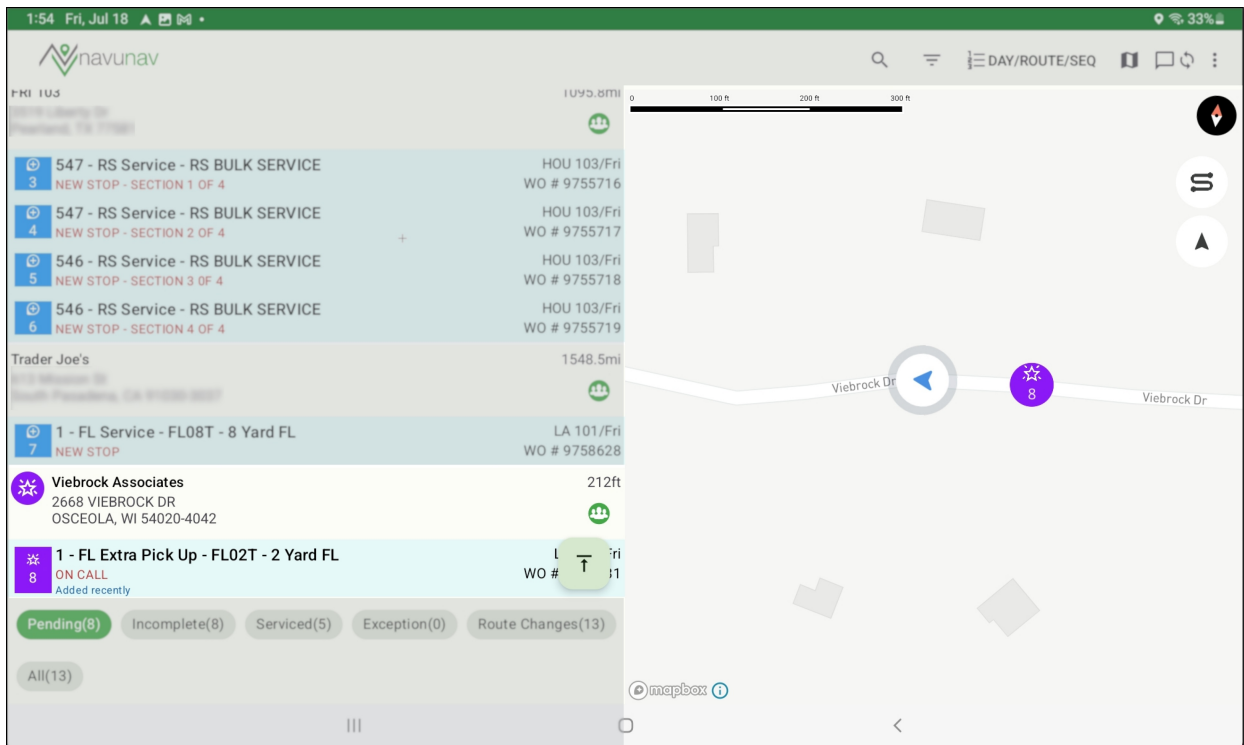
NavuNav Filter Setting

Drivers can filter their screen to show only VIP sites by enabling the "VIP Only" filter. This filter is disabled by default.



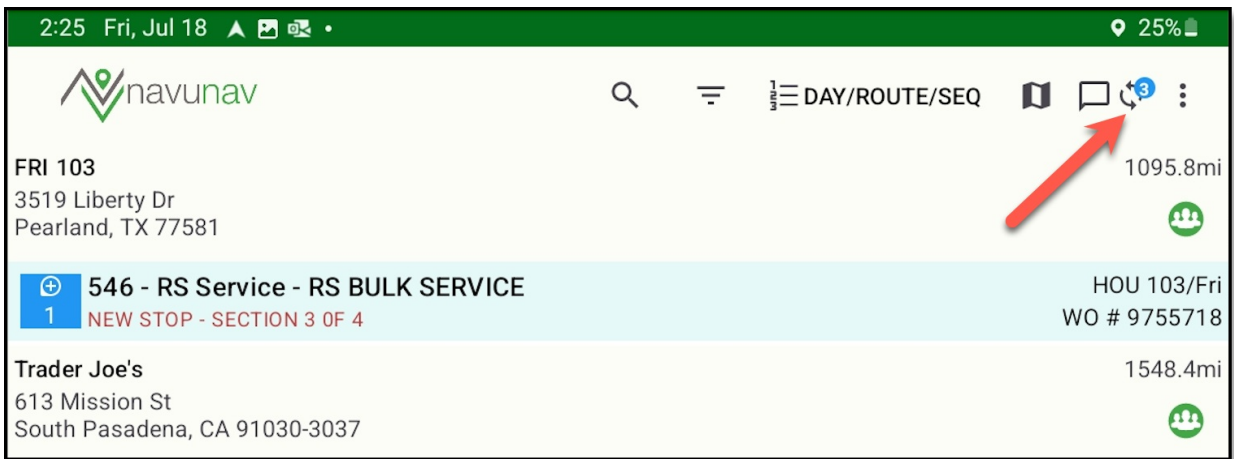
NavuNav

The Services List and map in NavuNav will prominently display a purple VIP icon for sites marked as VIP. This icon will also appear in the service detail popup accessible to drivers.



NavuNav (Android) - Sync Status Icon with Count Added (18807) [New Feature]

A Sync Status icon has been added to NavuNav, displaying the total number of items pending synchronization.



NavuNav (Android) - Check Out Action Not Recording (18556)

An issue has been resolved that prevented Post Trip and Log Out times from being reported in Dispatch.

DISPATCH													
FROM	TO	DIVISION	ROUTE PRIMARY LINE OF BUSINESS										
07/18/25	07/18/25	QAWASTE	Commercial										
Route Data Entry [User Icon] [Select Route Sheet] [Print] [Refresh] [Close]													
ROUTE	DRIVER	PAYROLL CLOCK IN	LOG IN	PRE TRIP	FIRST SERVICE TIME	LUNCH START	LUNCH END	LAST SERVICE TIME	TRUCK (DISTANCE)	FUEL	POST TRIP	LOG OUT	PAYROLL CLOCK OUT
- QAWASTE > Commercial > Friday Jul 18, 2025													
LA 101	Aliena Somers - Ad...	?	10:24 am	10:24 am					3002 (6672...)	0	2:53 pm	2:43 pm	?
LA 105	Paul Gonzalez - QA...	?		7:57 am					LA-1 (1 mi)	0			?
- QAWASTE > YARD: LALANDFILL > Commercial > Friday Jul 18, 2025													

NavuNav (Android) - Photo Enlarge/Exit Triggers App Crash (18889)

An issue has been resolved in the NavuNav application that caused it to crash when a driver captured a photo, enlarged it, clicked back, and attempted to recapture the photo.

Set Exception

Exception
Bin Overloaded

Notes

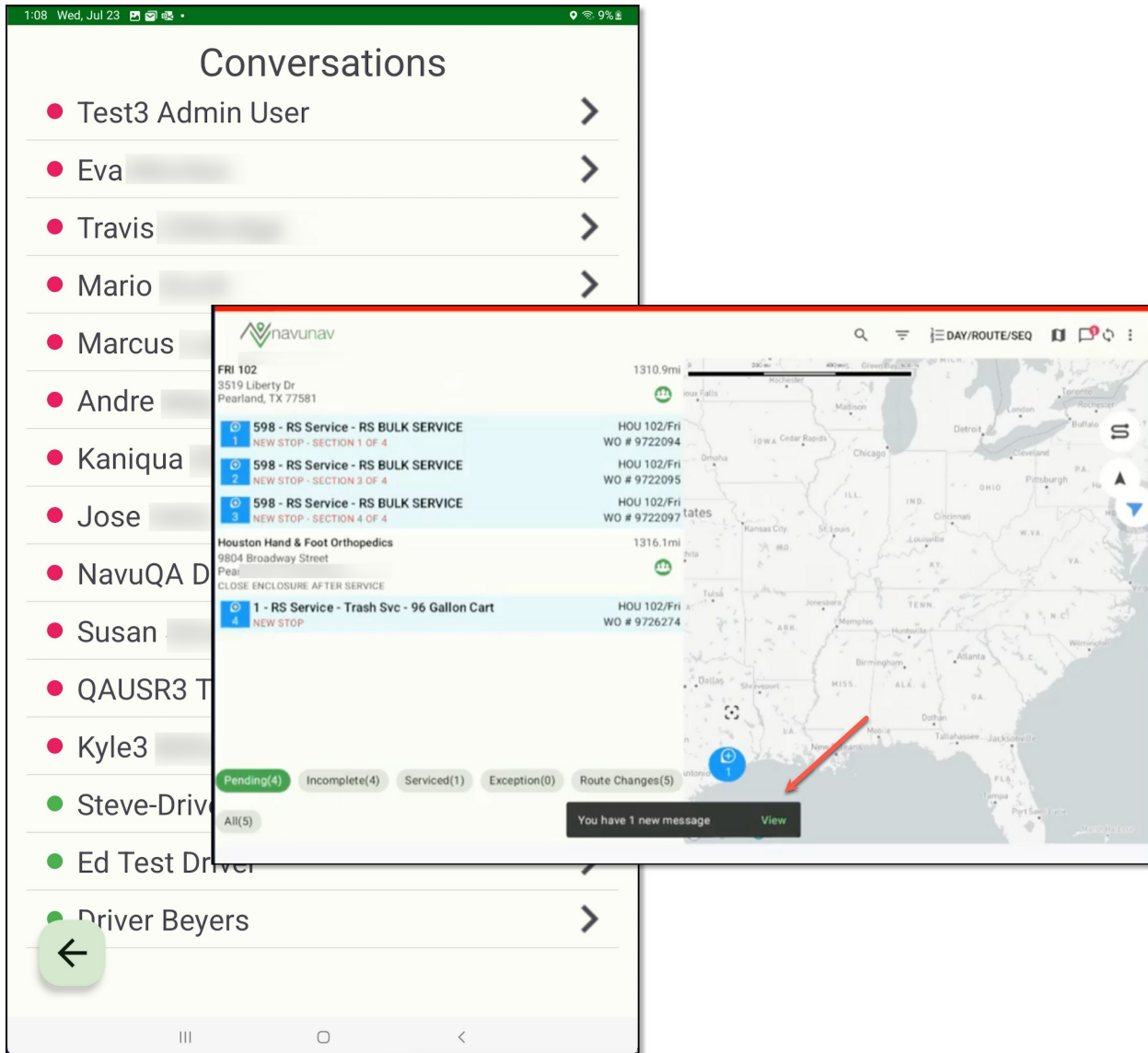
Use Camera



Selected



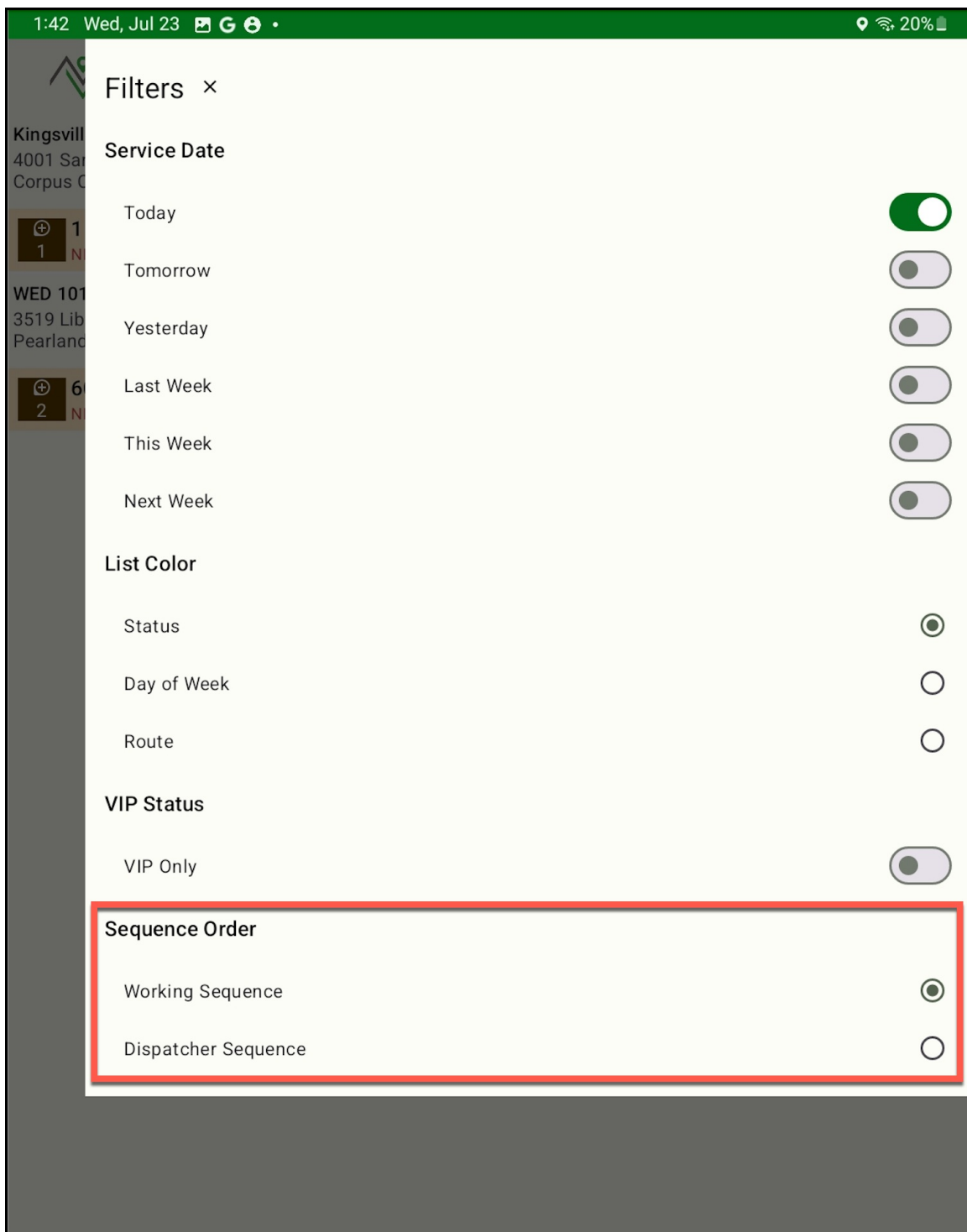
An issue has been resolved that prevented users from appearing on the Conversation screen in the NavuNav (Android) driver app, preventing drivers from sending and receiving messages. Additionally, when a new message comes in, a sound will play and a message will display on the bottom of the screen.



NavuNav (Android) - New Sequence Order Added to Sort/Filter Screen (18316) [New Feature]

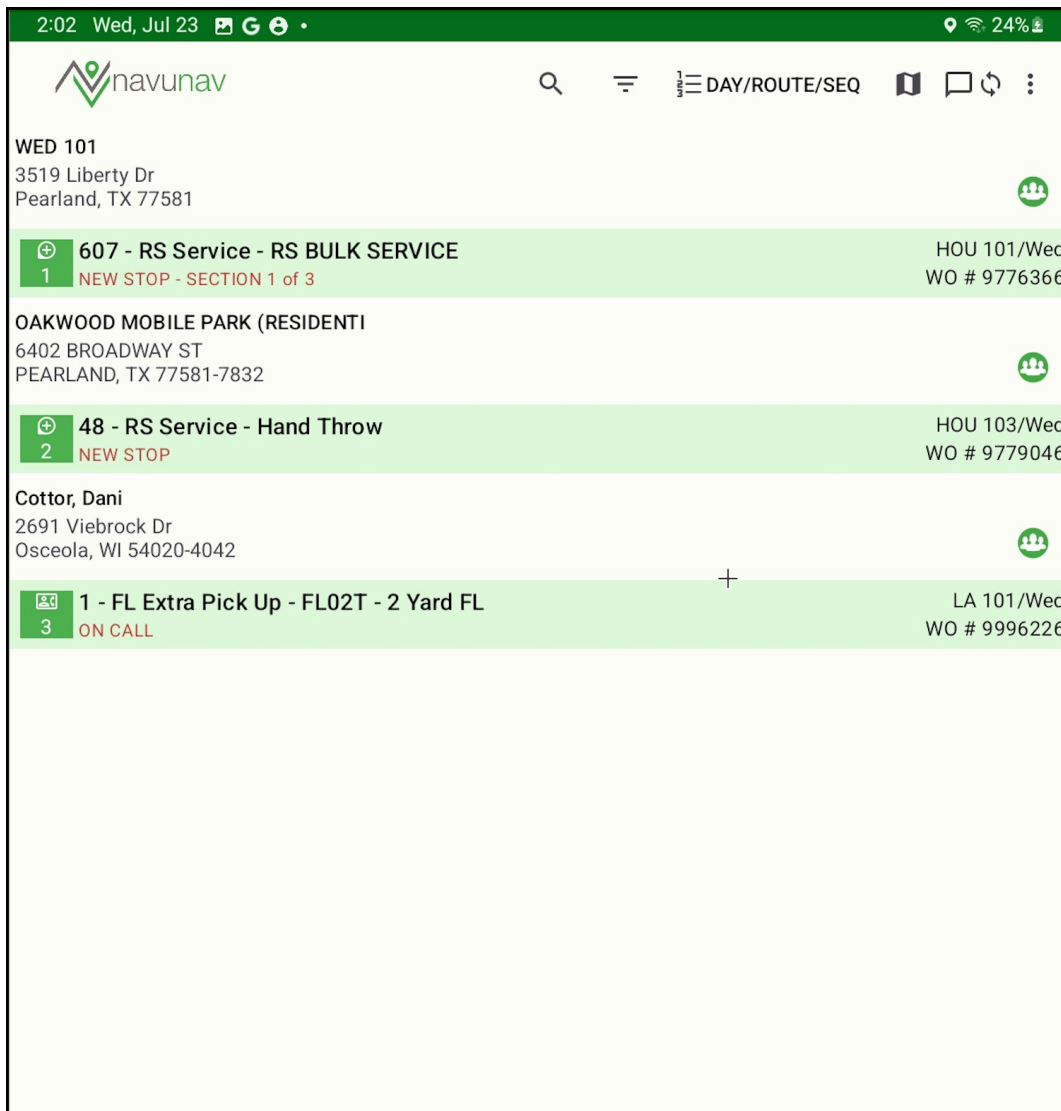
A new Sequence Order toggle has been added to the Filters screen, allowing drivers to choose how stops are sequenced. Selecting "**Working Sequence**" updates the next stop to be labeled as '1' each time a stop is completed. Alternatively, selecting "**Dispatch Sequence**" displays the same sequence numbers shown in Dispatch.

By default, **Working Sequence** is set.



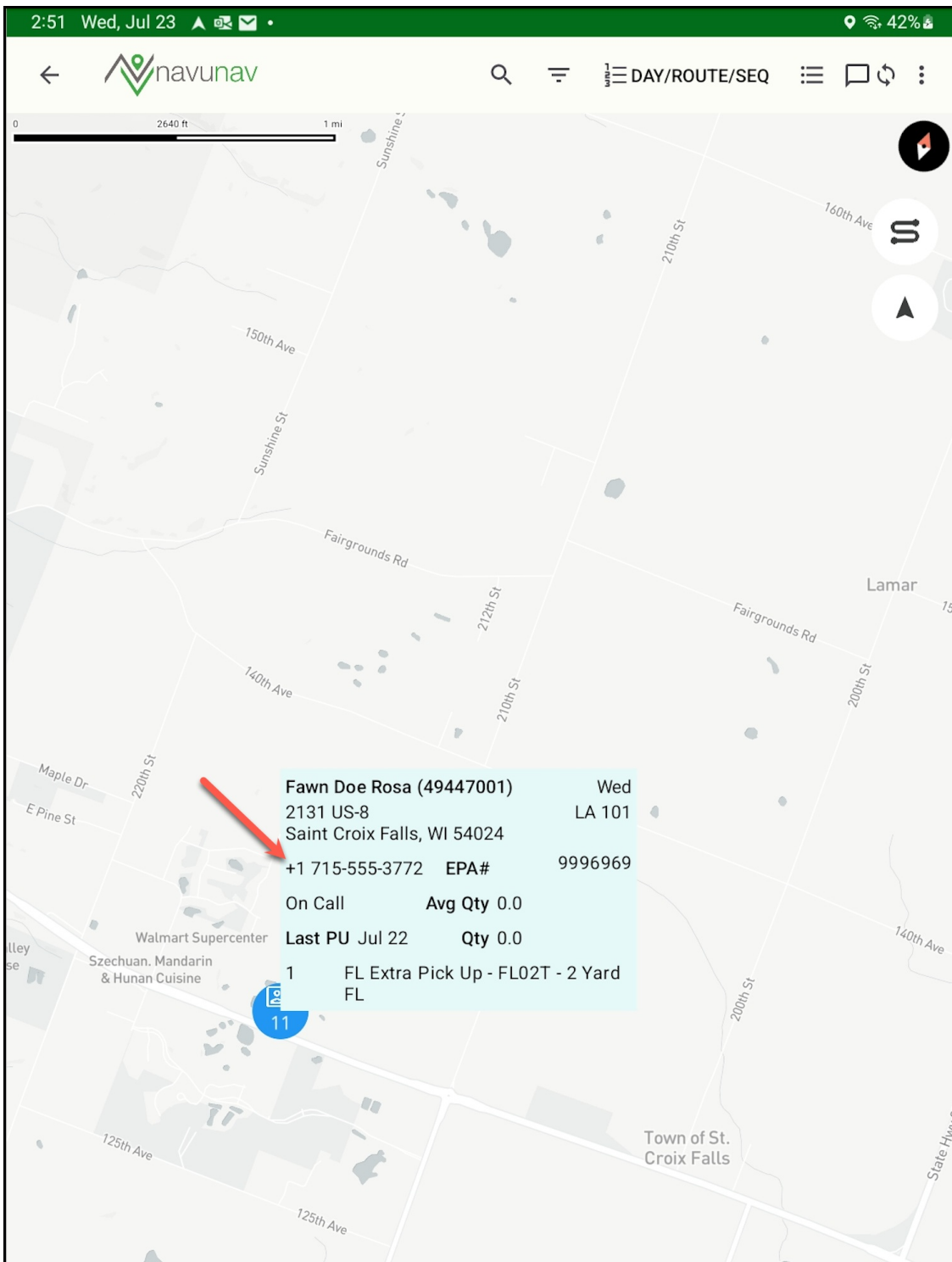
NavuNav (Android) - Stops Switching Back from Completed to Pending (18327)

An issue identified in beta version 6.3.17 caused completed stops to revert to pending when a driver applied a resolution while the application was offline. This has been resolved.



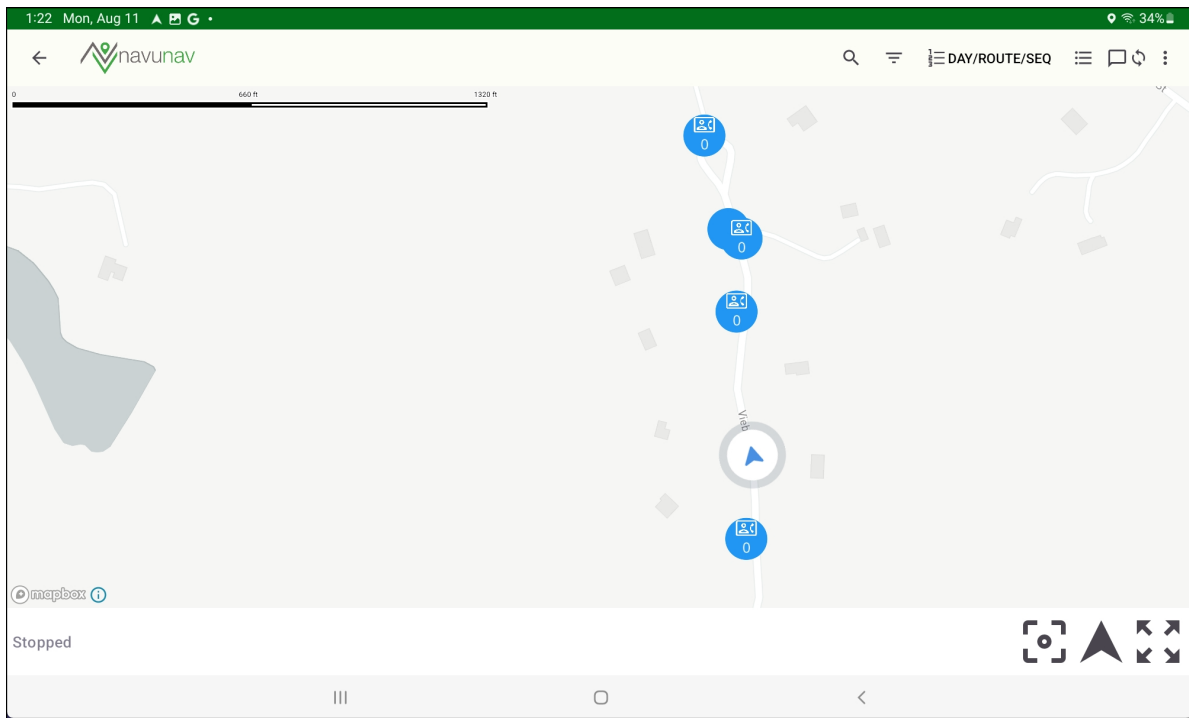
NavuNav (Android) - Wrong Phone Number Appearing on Map Tooltip (18853)

A sporadic issue has been resolved that was causing the previously viewed account's number to display in the tooltip of the next site the driver was viewing when a phone number doesn't exist for the site.



NavuNav (Android) - Residential Mode Crash Issue Resolved (18919)

In the NavuNav (Android) app, an issue that was causing the app to close unexpectedly has been resolved. Additionally, the default volume for driving directions is now set to mute.



Pathway: NavuNav > Residential Mode

NavuNav (Android) - Updated Permission Logic for Signature Capture (19025)

Previously in NavuNav, the Customer Signature screen did not respect permissions 257 (Add Contact) and 258 (Edit Contact), allowing drivers to add or edit a contact even when these permissions were set to "Not Authorized." This has been resolved.

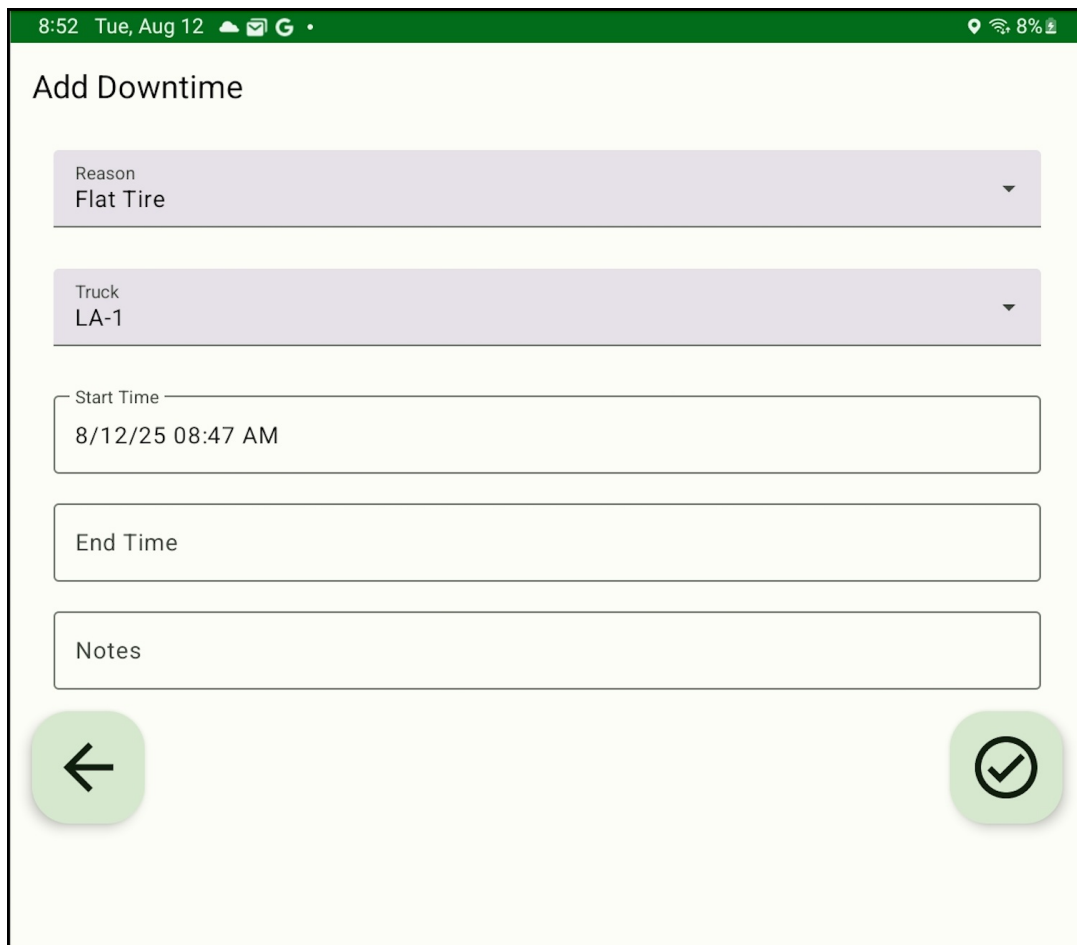


NavuNav(Android) - Modification to Downtime and Start/End Lunch Screens (17381)

The following enhancements have been made to the Downtime and Start/End Lunchtime screens:

Downtime

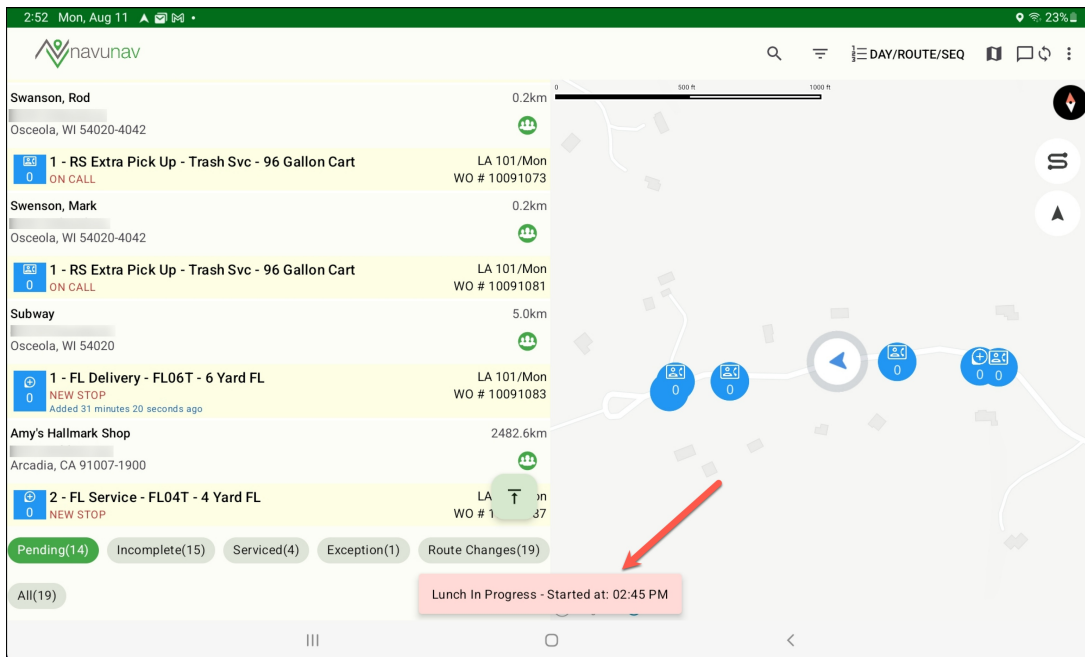
The Downtime screen logic has been updated to allow users to save a downtime without specifying an End Time. While a downtime is in progress, the option to add another downtime will be inactive.



The screenshot shows a mobile application interface for adding a downtime. At the top, the status bar displays the time 8:52, the date Tue, Aug 12, and various system icons. The app title 'Add Downtime' is prominently displayed. Below the title, there are four main input sections: a dropdown menu for 'Reason' with 'Flat Tire' selected, a dropdown menu for 'Truck' with 'LA-1' selected, a text input field for 'Start Time' containing '8/12/25 08:47 AM', and an empty text input field for 'End Time'. Below these is a larger text input field for 'Notes'. At the bottom of the screen, there are two circular buttons: a green button with a white left-pointing arrow on the left, and a green button with a white checkmark on the right.

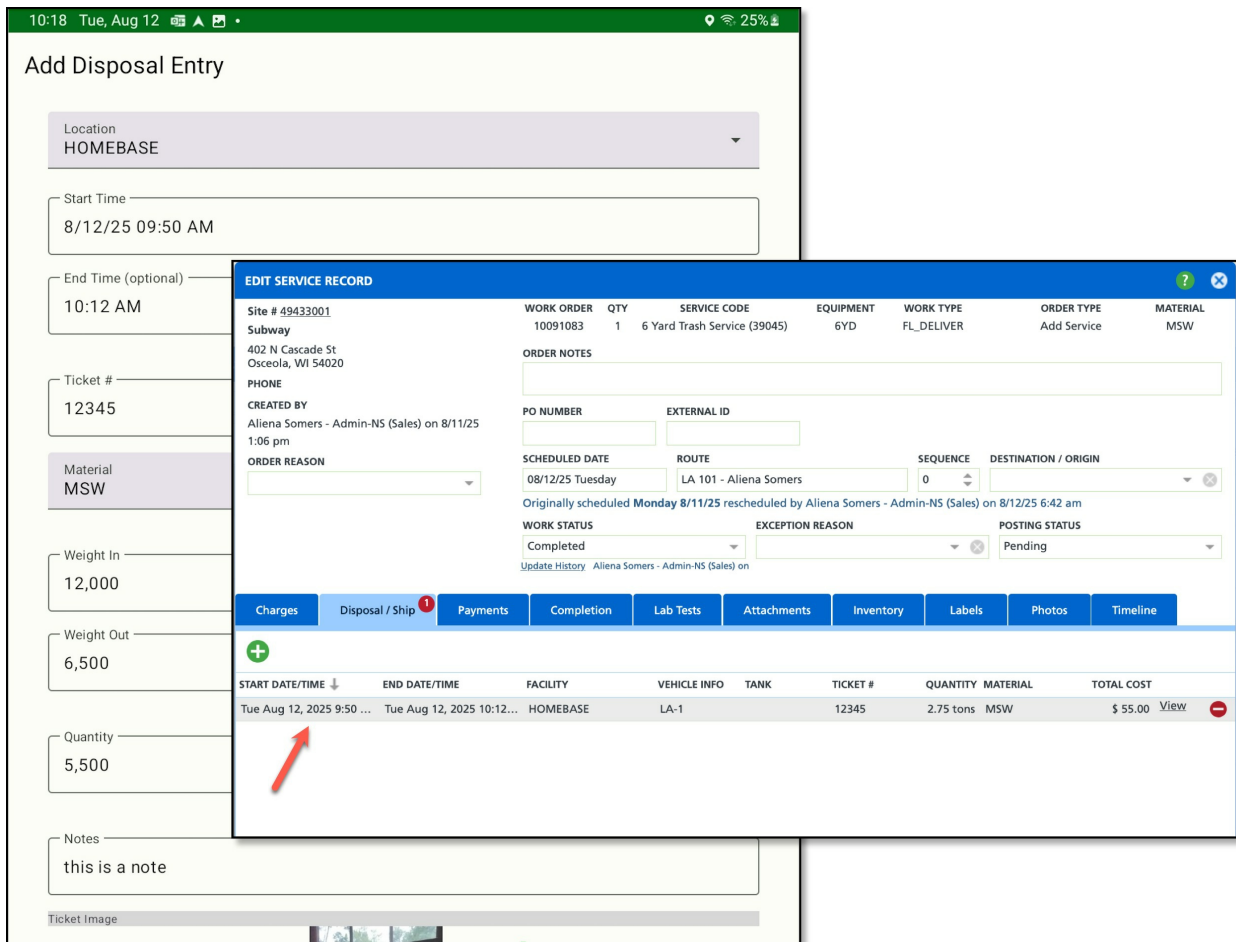
Lunch time

The Lunch Time logic has been updated to allow users to navigate away from the Lunch Time screen after starting lunch. If lunch is in progress and the user navigates away, a "Lunch In Progress" message will now appear at the bottom of the List/Service Detail screen. Additionally, a **Lunch End** option has been added to the app menu to record when lunch has ended.



NavuNav(Android) - Editing Disposal Ticket Created Duplicate Disposal Record (19091)

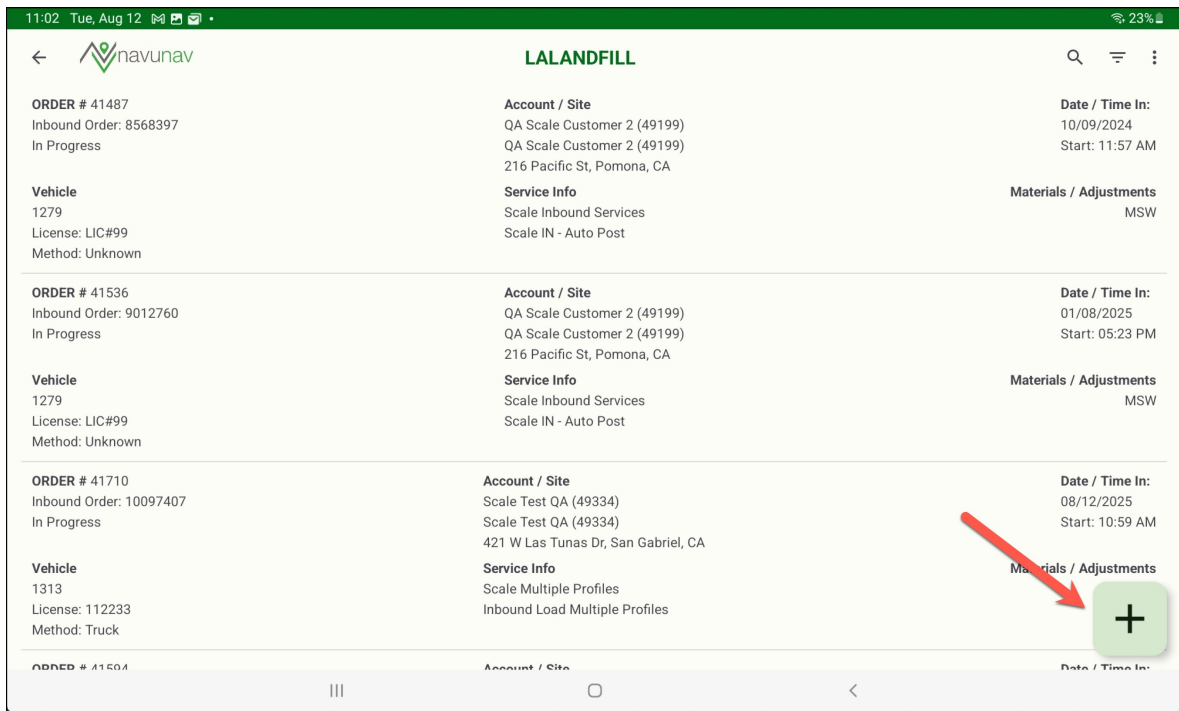
An issue has been resolved in NavuNav where editing a disposal record would create a duplicate.



NavuNav (Android) - Scale Photos - Ability to Create an Inbound Ticket (18201) [New Feature]

An option to start an inbound ticket has been added to Scale Photos in NavuNav to improve efficiency during

truck line backups. The process and screen formats are consistent with those in the Navusoft Inbound screen, ensuring a familiar user experience.

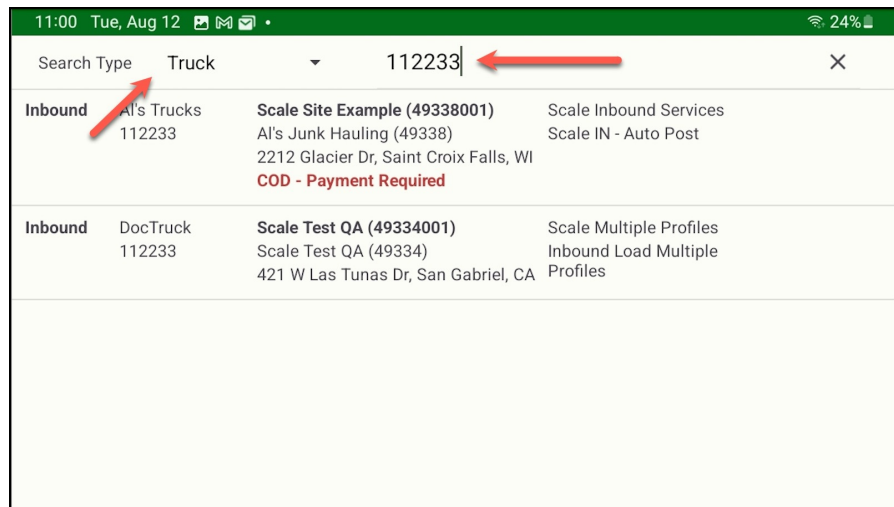


To support this, the following screens have also been added:

Create New Transaction - Search Options & Search Results

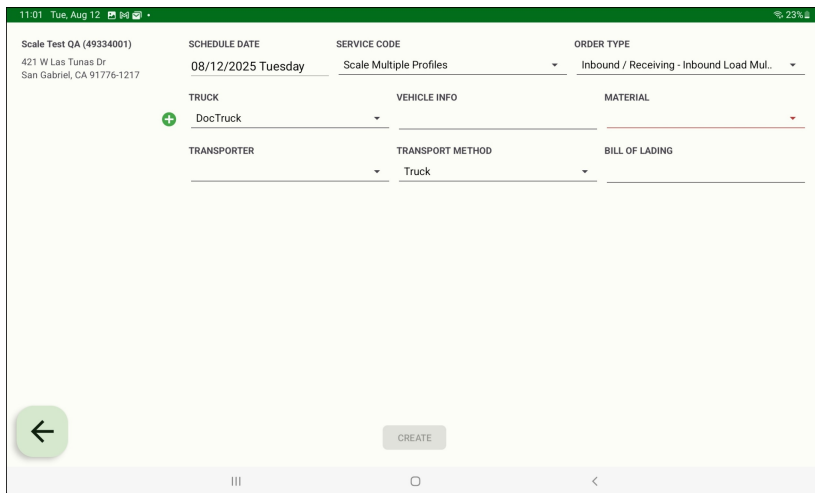
Search Type options include:

- Route
- Site
- Truck
- Work Order
- Waste Profile



Create Inbound Order

- Includes option to add a truck



Sync to Inbound screen in Navusoft

Once an inbound ticket is created, it will appear in the Inbound screen for the facility where it was recorded.

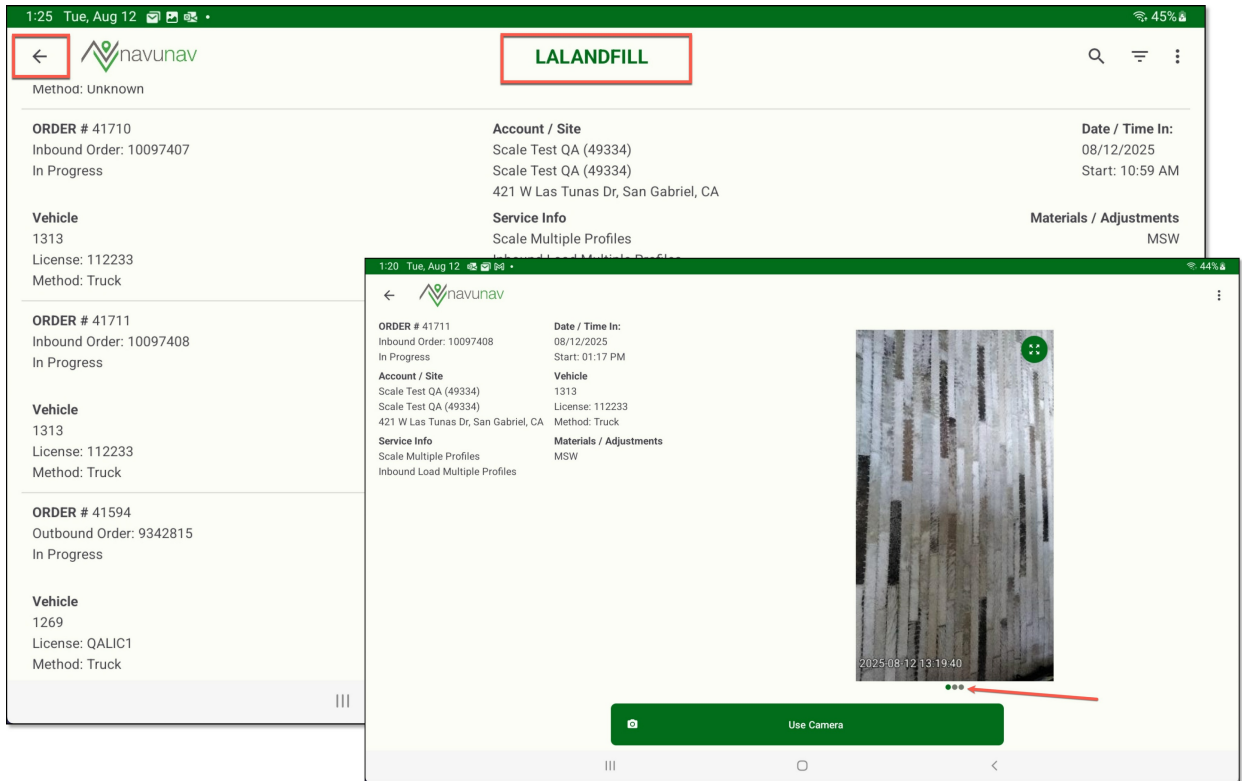
INBOUND / OUTBOUND									
FACILITY: LALANDFILL In Progress									
Inbound History Daily Totals									
ORDER #	DATE ↓	VEHICLE	ACCOUNT / SITE	TRANSPORT INFO	SERVICE INFO	MATERIALS / ADJUSTMENTS	WEIGHT	ADDITIONAL INFO	
TOTALS: 4 loads							0.00 tons	0.00 floz	
41710 Inbound Order: 10097407	08/12/25 Start: 10:59 ...	DocTruck Type: TEST License: 112233 Ext. Id: 112233	Scale Test QA (49334) Scale Test QA (49334001) 421 W Las Tunas Dr, San Gabriel, CA	Method: Truck	Scale Multiple Profiles Inbound Load Multiple Profiles	MSW			

Pathway: *NavuNav > Scale Photos [application]*

NavuNav (Android) - Scale Photos - Screen Enhancements (18202)

The following enhancements have been made to the Scale Photos list in the NavuNav application:

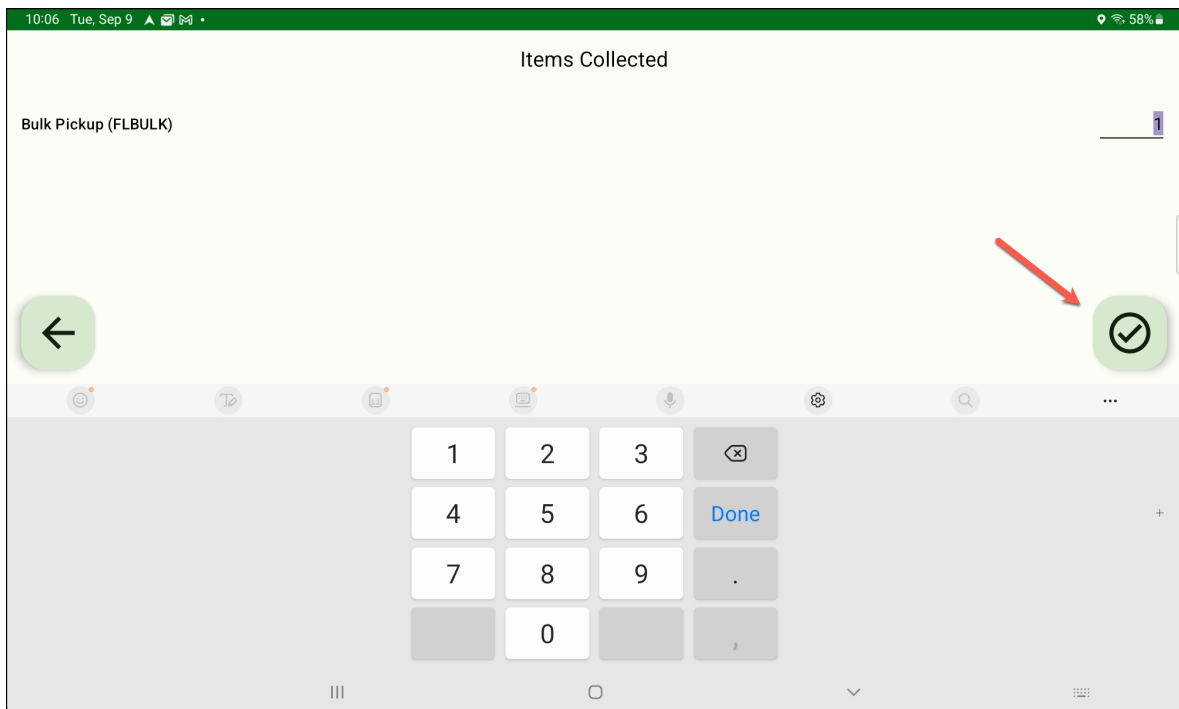
- The scale location is now displayed on the list.
- The back button on the Scale Photos list has been updated to return users to the Location list screen. Previously, it returned users to the Select Application screen.
- Multiple photos can now be captured and viewed in a scrollable carousel.



Pathway: NavuNav > Scale Photos [application]

NavuNav (Android) - Improvement to Items Collected Screen (19200)

The placement of the check mark icon used to complete entries on the Items Collected screen has been improved so it remains visible when the keyboard is open.



NavuNav (Android) - Odometer and Engine Hours Not Updating Correctly in Navusoft (19203)

An issue has been resolved that caused odometer and engine hours entered during the check-in and check-out process in NavuNav to report incorrectly in Truck Productivity.

TRUCK	DRIVER	STATE / PROVINCE	START TIME	START ODOMETER	START ENGINE HOURS	END TIME	END ODOMETER	END ENGINE HOURS
3002	Aliena Somers - Ad...		8:53 AM	25,896.00		10:03 AM	25,925.00	

SAVE

Pathway: *Operations > Dispatch > Truck Productivity*

NavuNav (Android) - Update to Photos Captured in Portrait View (19097)

An issue has been corrected that caused photos captured in portrait view from the NavuNav application to display sideways, causing the timestamp and location data to also appear rotated in NavuNav and Dispatch.

Image Example in NavuNav

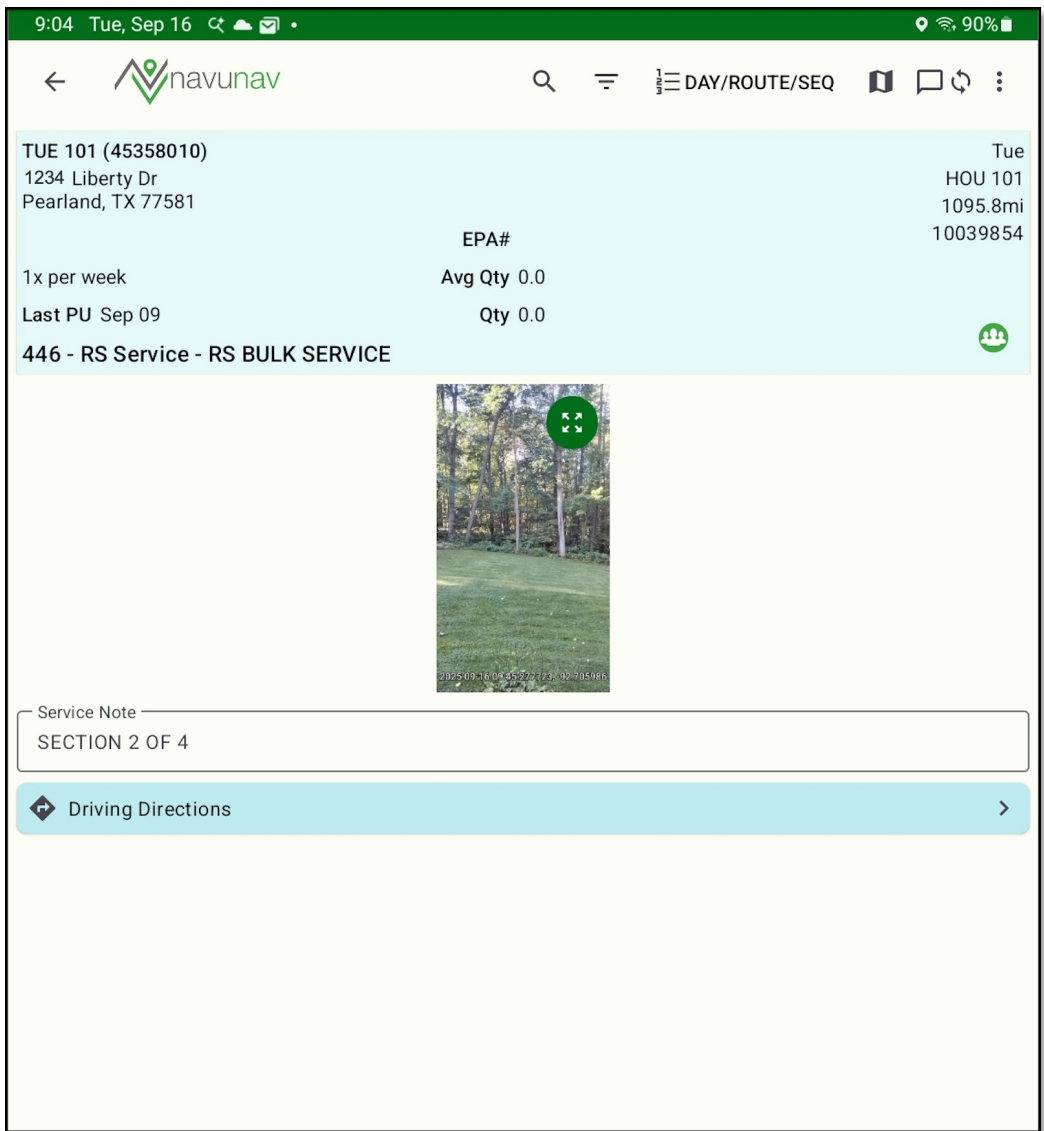


Image Example in Dispatch

EDIT SERVICE RECORD

Site # 45358010
 TUE 101
 SECTIONS 1-4
 1234 Liberty Dr
 Pearland, TX 77581

CREATED BY
 John Doe - Dispatcher (Operations) on
 8/2/25 3:55 am

ORDER REASON

SVC NOTE SECTION 2 OF 4

WORK ORDER 10039854 QTY 446 SERVICE CODE RS BULK SERVICE (31225) WORK TYPE RS_SERVICE ORDER TYPE Scheduled Service


ORDER NOTES

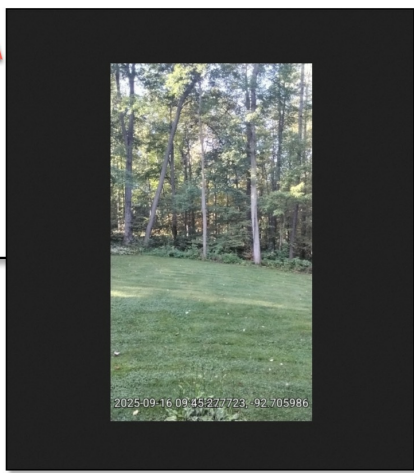
PO NUMBER EXTERNAL ID

SCHEDULED DATE 09/16/25 Tuesday ROUTE HOU 101 - Aliena Somers SEQUENCE 0 DESTINATION / ORIGIN

WORK STATUS Scheduled EXCEPTION REASON POSTING STATUS Pending

Charges Payments Completion Attachments Labels Photos 1

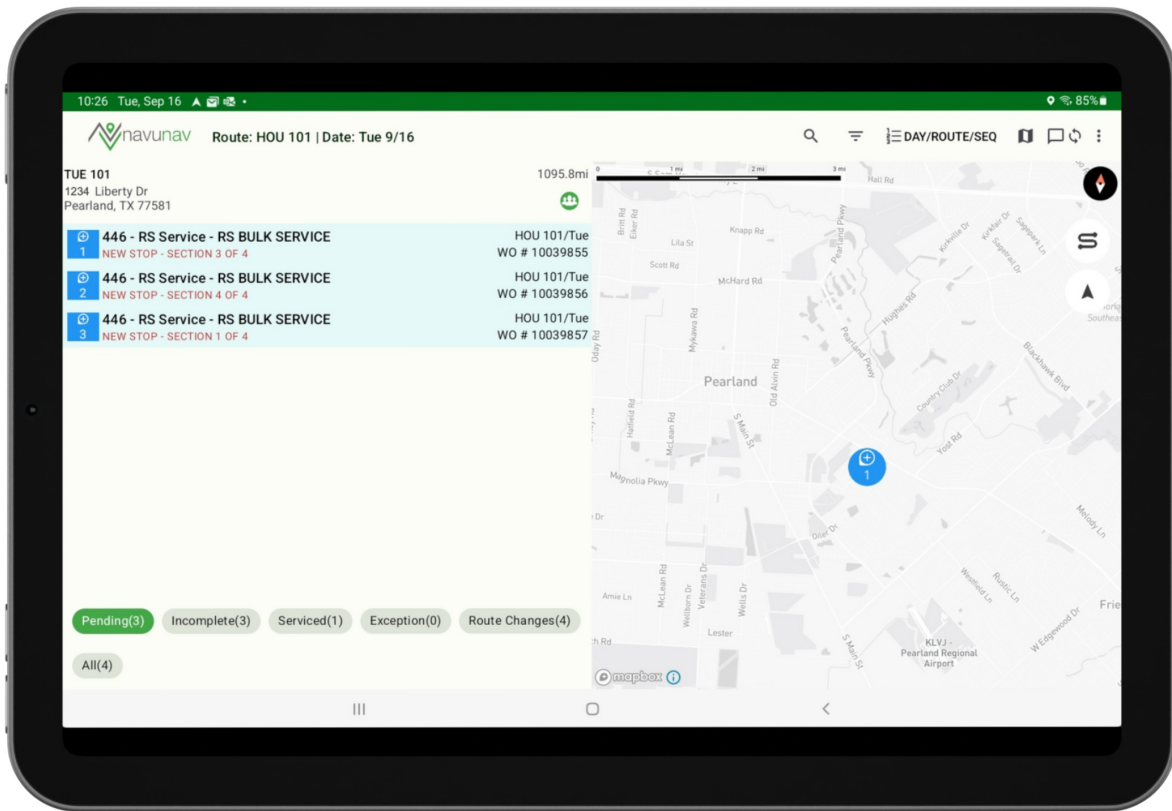
DESCRIPTION	CREATED ON	VIEW	DISPLAY IN CUSTOMER PORTAL	INCLUDE WITH INVOICE
Camera Photo	09/16/2025 4:03 am	 View	Yes	No



2025-09-16 09:45:27.723: 92705986

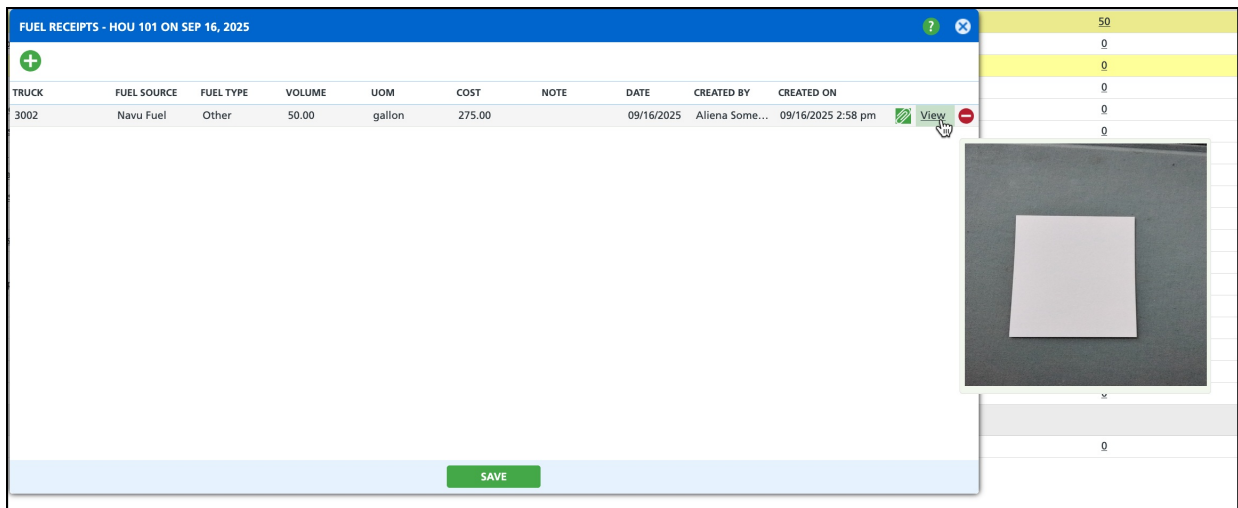
NavuNav (Android) - Map Centering Update on Stop List Screen (19276)

An issue has been resolved that caused the map to recenter over Europe after completing menu actions such as recording downtime or capturing a signature on stops.



NavuNav (Android) - Logic Updated to Image Upload (19239)

Previously, when a user selected an image uploaded from NavuNav, it was downloaded instead of opening as a preview in a new tab. This issue has been corrected in NavuNav, and images now open in a new tab as intended in Dispatch.



Pathway: Operations > Dispatch

Customer Portal

Customer Portal - Reset Password Updated

An inconsistency in password length validation between the **Enter New Password** and **Confirm New Password** fields has been corrected. Both fields now enforce a maximum length of 100 characters.

Reset Password ✕

Enter reset code

Enter new password

Confirm new password

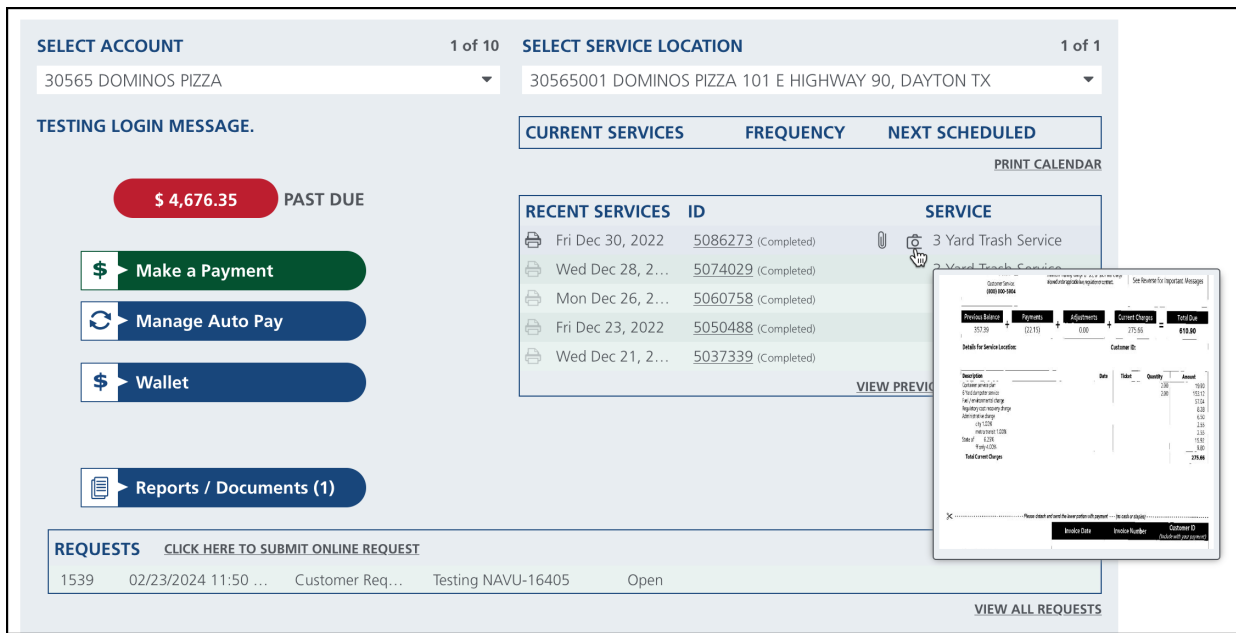
Show My Password

The password must be between 8 and 100 characters.
It must include at least 1 each of a digit, letter and special symbol

Pathway: *Customer Portal*

Customer Portal - Disposal Ticket Image Enlarged (18354)

The display size of disposal ticket images in the Customer Portal has been increased for easier viewing when hovering over the image icon. Additionally, clicking the **View** link now opens the image in a separate window for enhanced visibility.



Pathway: Customer Portal

Customer Portal - Ability to Self-Register and Auto Send Portal Invites (18439, 18449) [New Feature]

New setup fields and logic have been added to **System Options** and **Account Class Setup** to support automatically sending portal invitations to new contacts and allowing customers to self-register using a recent invoice.

Self Register Setup

System Settings: System Options [Customer Portal]

A new "Enable Request Login Button" option has been added to the Customer Portal section in System Options Setup. This setting controls whether the "Request Login" link is displayed on the Customer Portal sign-in page.

The screenshot displays the 'SYSTEM OPTIONS SETUP' interface with the 'Customer Portal' tab selected. The 'ENABLE REQUEST LOGIN BUTTON' option is highlighted in yellow. An inset shows a login form with a 'Request Login' button highlighted by a red arrow.

System	Sales	Integration	Account	Operations	Customer Portal	Broker	Online Order
CUSTOMER PORTAL URL							
DISPLAY SERVICE HISTORY	Yes						
DISPLAY AR HISTORY	Yes						
DISPLAY AGING BUCKETS	Yes						
DISPLAY LOGIN TERMS	Yes						
DISPLAY CURRENT SERVICES	Yes						
DISPLAY SERVICE QUANTITY	Yes						
ENABLE PAYMENT AS GUEST	Yes						
ENABLE AUTO PAY MAX AMOUNT	Yes						
DISPLAY THIRD PARTY INVOICES	No						
ACCOUNT INVITE FROM EMAIL							
INVITE EMAIL TEMPLATE	Portal Invite (All Divisions)						
ENABLE ACCOUNT REQUEST VIA ADDRESS	Yes						
ACCOUNT REQUEST ADDRESS FOUND TEMPLATE	Portal Invite (All Divisions)						
ENABLE REQUEST LOGIN BUTTON	Yes						

Inset Login Form:

Login to Manage your Account

Username

Password

Show My Password

Login

Forgot or Reset Password

Request Login

Testing login terms

Invoice Quick Pay

Submit Quick Request

System Settings: Account Class [Customer Portal]

A new field, "Allow Invoice-Verified Self Registration," has been added to Account Class Setup. When enabled, it allows customers to request a portal login invitation using a recent invoice that includes an invoice number and either a quick pay code or an account number.

ACCOUNT CLASS SETUP

ID ↑	NAME	DEFAULT ACCOUNT CREDIT LIMIT	DEFAULT ACCOUNT TERM	DEFAULT REBATE PAYMENT TYPE	DEFAULT BILL BY SITE	GL SEGMENT
1000	RESIDENTIAL	0	Net 20	Mail Check Account		12000
1001						
1002						
1003						
1004						
1007						
1008						
1009						
1010						
1011						
1012						
1013						
1014						

ADD ACCOUNT CLASS

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

ENABLE PORTAL ACCESS: Yes

CUSTOMER PORTAL HOME PAGE: [Dropdown]

ENABLE ADD SITES: No

NEW LOCATION TEMPLATE: [Dropdown]

NEW LOCATION BUNDLE: [Dropdown]

ENABLE ON CALL ORDERS: No

ENABLE REPORT ACCESS: [Dropdown]

ENABLE VIEWING INACTIVE SITE: No

DEFAULT WORK ORDER PHOTO - DISPLAY IN CUSTOMER PORTAL: No

DEFAULT WORK ORDER ATTACHMENT - DISPLAY IN CUSTOMER PORTAL: No

AUTO SEND PORTAL INVITATION ON CONTACT CREATION: No

ALLOW INVOICE-VERIFIED SELF REGISTRATION: No

SAVE

Please enter the information from a recent Invoice to verify your account and an invitation with login information will be sent to the provided email address.

Invoice # [Text Field]

Quick Pay Code / Account # [Text Field]

Contact Name [Text Field]

Email Address [Text Field]

Submit

[Back to Login](#)

Auto Send Portal Invites

System Settings: Account Class [Customer Portal]

- A new field, "Auto Send Portal Invitation on Contact Creation," has been added to Account Class Setup. When enabled, it automatically sends a portal invitation to contacts upon creation, provided a valid email address is entered.

ACCOUNT CLASS SETUP

ID ↑	NAME	DEFAULT ACCOUNT CREDIT LIMIT	DEFAULT ACCOUNT TERM	DEFAULT REBATE PAYMENT TYPE	DEFAULT BILL BY SITE	GL SEGMENT
1000	RESIDENTIAL	0	Net 20	Mail Check Account		12000
1001						000
1002						000
1003						000
1004						0001
1007						000
1008						000
1009						000
1010						000
1011						000
1012						000
1013						000
1014						000

ADD ACCOUNT CLASS

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

ENABLE PORTAL ACCESS: Yes

CUSTOMER PORTAL HOME PAGE: [Dropdown]

ENABLE ADD SITES: No

NEW LOCATION TEMPLATE: [Dropdown]

NEW LOCATION BUNDLE: [Dropdown]

ENABLE ON CALL ORDERS: No

ENABLE REPORT ACCESS: [Dropdown]

ENABLE VIEWING INACTIVE SITE: No

DEFAULT WORK ORDER PHOTO - DISPLAY IN CUSTOMER PORTAL: No

DEFAULT WORK ORDER ATTACHMENT - DISPLAY IN CUSTOMER PORTAL: No

AUTO SEND PORTAL INVITATION ON CONTACT CREATION: No

ALLOW INVOICE-VERIFIED SELF REGISTRATION: No

SAVE

Logic Updates to Add Account and Add Contact

The following logic has been implemented to support automatically sending a portal invitation to contacts on both new and existing accounts:

Add Contact to New (Active) Account

When a new active account is created, and the account class has '**Auto Send Portal Invitation on Contact Creation**' set to 'Yes' and an email address is entered for the contact, a Customer Portal invitation will be sent automatically.

Add Contact to Existing (Active) Account

When creating a new contact for an active account, an email will be automatically sent if the account class has '**Auto Send Portal Invitation on Contact Creation**' set to 'Yes' and an email address is entered for the contact.

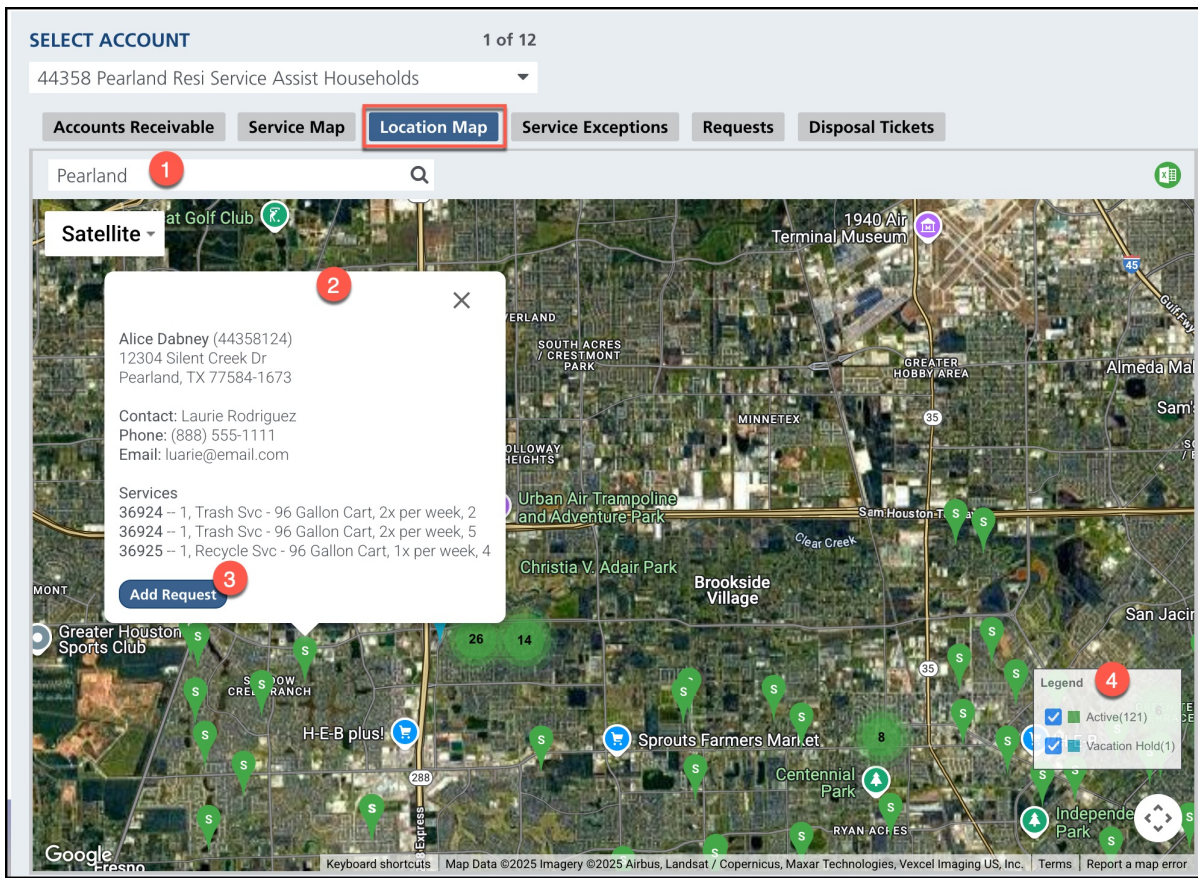
Customer Portal (Municipal) - New Location Map and Updates to Service Map (18438) [New Feature]

Mapping features available to Municipal account classes in the Customer Portal have been updated with the following:

Location Map (Previously 'Service Map') includes the following updates:

1. A new search feature has been added to the map, allowing users to search using the following criteria:
 - o Site ID
 - o Site NameSite

- Service Address (address line 1, city, or postal code)
2. Expanded tool tip information when a user clicks on a site.
 3. 'Add Request' button added to the tool tip that will open the 'Add Request' popup window.
 4. A new Legend has been added to the map, displaying site status colors along with a count of matching records and a checkbox next to each color to show or hide the corresponding pins.



New Service Map

A new Service Map has been added with the following features:

1. Filtering options based on Scheduled Date and Service Code
2. Search functionality to search by:
 - Site ID
 - Site Name
 - Site Service Address (address line 1, city, or postal code)
 - Work Order Number
3. Export functionality to export the data listed on the screen. If no data is listed, the Export button is disabled.
4. A tooltip displays relevant site, contact, and service information, with an **Add Request** button that opens the Add Request popup.
5. The Map Legend displays status colors for service records, with a count of matching records next to each status and a checkbox to show or hide the corresponding pins on the map.

Not shown- If the Scheduled Date is today, the current location of the truck servicing the route will also be displayed.

SELECT ACCOUNT 1 of 12

44358 Pearland Resi Service Assist Households

Accounts Receivable **Service Map** Location Map Service Exceptions Requests Disposal Tickets

Scheduled Date 07/17/2025 Service Code All Search

Satellite

Alice Dabney (44358124)
 12304 Silent Creek Dr
 Pearland, TX 77584-1673

Contact: Laurie Rodriguez
 Phone: (888) 555-1111
 Email: luarie@email.com

Services
 9746727 -- 1 x Recycle Svc - 96 Gallon Cart - Status: Scheduled

Add Request

Legend
 Scheduled(78)
 Not Serviced(3)
 Service Completed(2)

Pathway: Customer Portal

Customer Portal - Incorrect Display of Services on Activity Calendar (18272)

An issue has been resolved where, if a site had no active services, the Activity Calendar displayed results from the previously viewed site.

49315 Viebrock Associates

OSCEOLA, WI 54020-4042
US

TERMS Net 20
INVOICE DELIVERY Printed

Active

DIVISION QAWASTE
ACCOUNT MGR Aliena Somers - Admin-NS (Sales)
CLASS COMMERCIAL
BILL GROUP Annual Billing
ADVANCE - ANNUALLY Billed Thru Date Jul 31, 2025

49315001 Viebrock Associates

OSCEOLA, WI 54020-4042

BUSINESS HOURS / SERVICE WINDOW
Weekdays 7:00 AM to 6:00 PM

CURRENT	1-30	31-60	61-90	91-120	120+	TOTAL
0.00	192.38	0.00	0.00	0.00	0.00	192.38

Auto Pay Not Enabled

HIGHLIGHTS

PENDING

4183 Proposal Aliena Somers - Admin-NS (Sales) 07/16/2025

ACTIVE SERVICES (0) Standard TOTAL RECURRING

QTY	SERVICE CODE	SERVICE ID	LAST ACTIVITY	FREQUENCY	SCHEDULE	PER UNIT RATE	RATE
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CALENDAR August, 2025

EVENTS Appointment, AR, Cancellation, Complaint, Er

SUN	MON	TUE	WED	THU
Jul 27	Jul 28	Jul 29	Jul 30	Jul 31
			Invoice 915850	
Aug 3	Aug 4	Aug 5	Aug 6	Aug 7
		(1 views) - Aliena Somers	1, FL_SERVICE, 2YD, MSW	
Aug 10				

\$ 192.38 TOTAL DUE

\$ 192.38 PAST DUE

Your Account is Past Due

Make a Payment

Invoice History

Manage Auto Pay

Wallet

Reports / Documents

QUESTIONS CLICK HERE TO SUBMIT ONLINE REQUEST

VIEW ALL REQUESTS

CURRENT SERVICES FREQUENCY NEXT SCHEDULED

ACTIVITY CALENDAR August, 2025

MON	TUE	WED	THU	FRI	SAT/SUN
Jul 28	Jul 29	Jul 30	Jul 31	Aug 1	Aug 2/27
			Invoice 915850	1, FL_SERVIC...	
Aug 4	Aug 5	Aug 6	Aug 7	Aug 8	Aug 9/3
			1, FL_SERVIC...		
Aug 11	Aug 12	Aug 13	Aug 14	Aug 15	Aug 16/10
			1, FL_SERVIC...		
Aug 18	Aug 19	Aug 20	Aug 21	Aug 22	Aug 23/17
			1, FL_SERVIC...	1, FL_REMOV...	1, RS_REMOV...
				2 Yard Trash S...	+2 Events...
Aug 25	Aug 26	Aug 27	Aug 28	Aug 29	Aug 30/24
1, RS_EXTRAP...					
Sep 1	Sep 2	Sep 3	Sep 4	Sep 5	Sep 6/31

Pathway: Customer Portal > Activity Calendar