

# User Accounts

Last Modified on 08/20/2025 10:46 am PDT

Pathway: Setup > System > User

The User Setup screen manages the setup and activation status of all user accounts. In here, roles and division access can be added and removed from a user's account. This tool provides an option to filter the User Setup screen by department and defaults to hide inactive accounts from view.

USER SETUP														SETUP > SYSTEM > USER					
+ DEPARTMENT		All		HIDE INACTIVE															
ID	STATUS	FIRST NAME	LAST NAME	EMAIL	PHONE	OFFICE PHONE	TITLE	DEPARTMENT	MANAGER	SALES GOAL TYPE	EXTERNAL ID	EXTERNAL USER ID	DEFAULT APP COLOR	DEFAULT HOME PAGE	ONLINE IMAGE	AUTOMATIC COUNTERS...	SIGNATURE IMAGE		
3	Active	Michael	Smith	michaels...			Tech Guy	Admin		Revenue			Dark Gray	Dashboard		No			
4	Active	Nikita	Ray	nikita@Fa...						Revenue			Dark Gray	Recent Ac...		No			
5	Active	Aliena	Springer	aliena@F...			Admin-NS	Admin	Henry Daye	Revenue			Blue	Recent Ac...		No			
6	Active	CT	ct@FakeEma...	ct@FakeE...			Admin - NS	Admin		Revenue			Dark Gray	Recent Ac...		No			
7	Active	Matthew	VanMeter	matthew...			Admin - NS	Admin		Revenue	99999		Dark Green	Recent Ac...		No			
8	Active	Dereck	Jones	dereck@F...			Terminated-NS	Admin	Henry Daye	Revenue			Blue	Recent Ac...		No			
9	Active	Brad	Peterson	brads@Fa...			NS Admin	Admin	Alek Orloff	Revenue			Dark Gray	Recent Ac...		No			
11	Active	Chris	Fairber	cFairber@...			Sales			Revenue			Dark Gray	Recent Ac...		No			
12	Active	Holley	Patterson	holley@F...			Director of L...			Revenue			Dark Gray	Recent Ac...		No			
13	Active	Dave	Roberts	davep@F...			Support Ana...			Revenue			Dark Gray	Recent Ac...		No			
22	Active	Isabel	Navarro	isabeln@F...			Intern			Revenue			Blue	Recent Ac...		No			
23	Active	Emilio	Natarán	emilio@F...	28121		Admin-NS	Admin	Alek Orloff	Revenue			Blue	Recent Ac...		No			
Roles		Divisions		Commission Plan		Capabilities													
ROLE ID							ROLE NAME												
1018							Customer Service Manager												
1000							Operations Mgr												
3							Sales Representative												
2							Sales Manager												
1022							Technician-Assignment												
1021							Helper-Assignment												
1019							Crew/Labor/Technician												
1017							Billing Mgr												
1016							Dispatcher												
1015							Customer Service Rep												
1014							Administrator												
5							Controller												
1020							Driver-Assignment												
4							Driver												

## Permissions

The following permissions are required to add and edit user accounts:

Permission ID	Permission Name
95	Setup Main Menu
120	Setup \ System and Security

## Add a New User

The following process applies to the creation of new user accounts. Fields highlighted in red are required.

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DEPARTMENT

All

HIDE INACTIVE

☒

ID	STATUS	FIRST NAME	LAST NAME	EMAIL	PHONE	OFFICE PHONE	TITLE	DEPARTMENT	MANAGER	SALES GOAL TYPE	EXTERNAL ID	EXTERNAL USER ID
2	Active								Alek Orloff - CF...	Revenue		
3	Active									Revenue		
4	Active									Revenue		
5	Active								PG 2	Revenue		
6	Active									Revenue		
7	Active								David Navarro ...	Revenue	99999	
8	Active								Ted Brister - IT ...	Revenue		
9	Active								Alek Orloff - CF...	Revenue		
11	Active									Revenue		
12	Active									Revenue		
13	Active									Revenue		
22	Active									Revenue		
24	Active									Revenue		
28	Active								Alek Orloff - CF...	None		
31	Active									Revenue		
									PG 2	Revenue		

ADD USER

STATUS

Active

FIRST NAME

LAST NAME

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

EMAIL

MOBILE PHONE

🇺🇸

 (999) 999-9999

OFFICE PHONE

🇺🇸

 (999) 999-9999

TITLE

DEPARTMENT

MANAGER

SALES GOAL TYPE

None

EXTERNAL ID

EXTERNAL USER ID

DEFAULT APP COLOR

Dark Gray

WORKER COST PER HOUR LEVEL

Alert Notification Method

☒ In Application Popup
 ☐ Text Message
 ☒ Email

☒ Send Daily Activity Summary Email

DEFAULT HOMEPAGE

ONLINE IMAGE

Select Image... BROWSE...

AUTOMATIC COUNTERSIGN

No

SIGNATURE IMAGE

Select Image... BROWSE...

SAVE

## Field Descriptions

Field	Description
Status	Status refers to the current state of the individual account within the system. An <b>active</b> account allows users to access and use associated tools and features, while an <b>inactive</b> account indicates deactivated access.
First Name / Last Name	Fields to enter the user's first and last name. First and Last name display in various areas the user's name is referenced in the application.
Email	Enter a <u>work email</u> for the user.
Mobile Phone	The user's cell phone number. The system will not allow a save if the phone number is not a registered and active number.
Office Phone	Option to add a user's office phone.
Title	Option to add the user's title. When a title is entered it will display beside the user's name in various screen locations. <i>Example: Dispatch</i>
Department	The user's department determines the specific area they work in. Application tools such as Tasks provide the option to filter and view or assign responsibilities based on the department.
Manager ID	Option to enter the ID of the manager the user reports to.
Sales Goal Type	Preset to display 'Revenue'.
External ID	Option to enter an ID.
External User ID	Option to enter an external User ID for third party systems.
Default App Color	Controls the color schema of the user's application. Options include: <ul style="list-style-type: none"> <li>Blue - Headers and tabs will display blue.</li> <li>Dark Gray - Headers and tabs will display gray.</li> <li>Dark Green - Headers and tabs will display green.</li> </ul> <i>Users may also change their default app color from their User Profile.</i>
Worker Cost Per Hour	Option to record the worker's pay grade. Selection options for this drop down are created in <i>Setup &gt; Operations &gt; Equipment Maintenance &gt; Worker Cost Per Hour</i>

<b>Alert Notification Method</b>	Identifies which method the user should receive alert notifications from the system. Options include: <ul style="list-style-type: none"> <li>• In Application Popup</li> <li>• Text Message- Must be a valid phone number for a device that can receive text messages.</li> <li>• Email- A valid email address must be entered.</li> </ul>
<b>Send Daily Activity Summary Email</b>	Emails a summary of the Recent Activity home screen to the user.
<b>Default Homepage</b> <i>Required</i>	Determines what homepage the user will see upon logging in to their application. Options include: <ul style="list-style-type: none"> <li>• Dashboard</li> <li>• Recent Activity</li> <li>• Sales Representative</li> </ul> <p><i>* Users can temporarily change their homepage view by right-clicking on the Home module and selecting another option. Users may also permanently change their default homepage from their User Profile.</i></p>
<b>Online Image</b>	Option to upload an image that will display in Navu Chat by the user's name. <i>Users may also change their online image from their User Profile.</i>
<b>Automatic Countersign</b>	Option for user's to enable automatic countersigning for contracts and other system prompted signature requests. <i>Users may update the Automatic Countersign option from their User Profile.</i>
<b>Signature Image</b>	If Automatic Countersign is set to 'Uploaded Signature', browse and upload the signature here. <i>Users may also update their signature image from their User Profile.</i>

### Add a New User Account

1. Select the **green plus icon** from the upper left corner of the screen and the **Add User** editor will display.
2. Enter a **Status** for the user. This field defaults to Active and when set to Inactive prevents a user from logging in.
3. Enter the user's name in the **First Name** and **Last Name** fields.
4. Enter an **Email** the user will use when logging in. For security reasons, it is not recommended best practice to enter a personal email in this field.
5. Select a **Default Homepage** the user will see upon each login.
6. Click **Save**.

## Assign Users Roles

Roles are grouping of permissions users must be assigned to work within the Navusoft application. Roles are created and maintained by a system administrator and display under the Roles tab in a user's account.



To view and edit the permissions a role includes, navigate to *Setup > System > Role*.

USER SETUP																	SETUP > SYSTEM > USER
+ DEPARTMENT		All		HIDE INACTIVE													
ID ↑	STATUS	FIRST NAME	LAST NAME	EMAIL	PHONE	OFFICE PHONE	TITLE	DEPARTMENT	MANAGER	SALES GOAL TYPE	EXTERNAL ID	EXTERNAL USER ID	DEFAULT APP COLOR	DEFAULT HOME PAGE	ONLINE IMAGE	AUTOMATIC COUNTERS...	SIGNATURE IMAGE
3	Active	Michael	Smith	michaels...			Tech Guy	Admin		Revenue			Dark Gray	Dashboard		No	
4	Active	Nikita	Ray	nikita@Fa...						Revenue			Dark Gray	Recent Ac...		No	
5	Active	Aliena	Springer	aliena@F...			Admin-NS	Admin	Henry Daye	Revenue			Blue	Recent Ac...		No	
6	Active	CT	ct@FakeEma...	ct@FakeE...			Admin - NS	Admin		Revenue			Dark Gray	Recent Ac...		No	
7	Active	Matthew	VanMeter	matthew...			Admin - NS	Admin		Revenue	99999		Dark Green	Recent Ac...		No	
8	Active	Dereck	Jones	dereck@F...			Terminated-NS	Admin	Henry Daye	Revenue			Blue	Recent Ac...		No	
9	Active	Brad	Peterson	brads@Fa...			NS Admin	Admin	Alek Orloff	Revenue			Dark Gray	Recent Ac...		No	
11	Active	Chris	Fairber	cFairber@...				Sales		Revenue			Dark Gray	Recent Ac...		No	
12	Active	Holley	Patterson	holley@F...			Director of I...			Revenue			Dark Gray	Recent Ac...		No	
13	Active	Dave	Roberts	davep@F...			Support Ana...			Revenue			Dark Gray	Recent Ac...		No	
22	Active	Isabel	Navarro	isabeln@F...			Intern			Revenue			Blue	Recent Ac...		No	
23	Active	Emilio	Natarán	emilio@E...	78121		Admin-NS	Admin	Alek Orloff	Revenue			Blue	Recent Ac...		No	
<div> <div>Roles</div> <div>Divisions</div> <div>Commission Plan</div> <div>Capabilities</div> </div>																	
ROLE ID	ROLE NAME																
1018	Customer Service Manager																<input checked="" type="checkbox"/>
1000	Operations Mgr																<input checked="" type="checkbox"/>
3	Sales Representative																<input checked="" type="checkbox"/>
2	Sales Manager																<input checked="" type="checkbox"/>
1022	Technician-Assignment																<input checked="" type="checkbox"/>
1021	Helper-Assignment																<input checked="" type="checkbox"/>
1019	CrewLabor/Technician																<input checked="" type="checkbox"/>
1017	Billing Mgr																<input checked="" type="checkbox"/>
1016	Dispatcher																<input checked="" type="checkbox"/>
1015	Customer Service Rep																<input checked="" type="checkbox"/>
1014	Administrator																<input checked="" type="checkbox"/>
5	Controller																<input checked="" type="checkbox"/>
1020	Driver-Assignment																<input checked="" type="checkbox"/>
4	Driver																<input checked="" type="checkbox"/>

## Add/Remove Roles



Permissions may be active in more than one role; meaning, a user may be removed from a role but will retain access to a tool if another role assigned to their user account includes the permission. Consider reviewing roles and their permissions periodically to prevent unauthorized access and ensure proper security measures are maintained.

1. Select the user account you would like to assign roles to from the upper grid.
2. Select the Roles tab to display the list of roles in the lower grid.
3. Use the toggle buttons associated to the roles to either add or remove them from the user's account.

## Related Articles:

[Role Setup](#)

[Permission Setup](#)

# Assign Users Divisions

Divisions represent distinct operational locations, regions, or municipalities where a company serves its customers. They allow companies to effectively cater to specific areas. For instance, a waste management company may establish a division in Houston to serve residents there, while maintaining another division in Austin for the Austin residents. Each division is associated with a user's account, granting them access solely to the information pertaining to that particular division.

USER SETUP

DEPARTMENT

All

HIDE INACTIVE

Search

SETUP > SYSTEM > USER

ID	STATUS	FIRST NAME	LAST NAME	EMAIL	PHONE	OFFICE PHONE	TITLE	DEPARTMENT	MANAGER	SALES GOAL TYPE	EXTERNAL ID	EXTERNAL USER ID	DEFAULT APP COLOR	DEFAULT HOME PAGE	ONLINE IMAGE	AUTOMATIC COUNTERS...	SIGNATURE IMAGE
3	Active	Michael	Smith	michaels...			Tech Guy	Admin		Revenue			Dark Gray	Dashboard		No	
4	Active	Nikita	Ray	nikita@Fa...						Revenue			Dark Gray	Recent A...		No	
5	Active	Aliena	Springer	aliena@F...			Admin-NS	Admin	Henry Daye	Revenue			Blue	Recent A...		No	
6	Active	CT	ct@FakeEma...	ct@FakeE...			Admin - NS	Admin		Revenue			Dark Gray	Recent A...		No	
7	Active	Matthew	VanMeter	matthew...			Admin - NS	Admin		Revenue	99999		Dark Green	Recent A...		No	
8	Active	Dereck	Jones	dereck@F...			Terminated-NS	Admin	Henry Daye	Revenue			Blue	Recent A...		No	
9	Active	Brad	Peterson	brads@Fa...			NS Admin	Admin	Alek Orloff	Revenue			Dark Gray	Recent A...		No	
11	Active	Chris	Fairber	cFairber@...			Sales			Revenue			Dark Gray	Recent A...		No	
12	Active	Holley	Patterson	holley@F...			Director of I...			Revenue			Dark Gray	Recent A...		No	
13	Active	Dave	Roberts	davep@F...			Support Ana...			Revenue			Dark Gray	Recent A...		No	
22	Active	Isabel	Navarro	isabeln@...			Intern			Revenue			Blue	Recent A...		No	
23	Active	Enilia	Natarón	amilio@E...	28121		Admin-NS	Admin	Alek Orloff	Revenue			Blue	Recent A...		No	

Roles

Divisions

Commission Plan

Capabilities

DIVISION ID	DIVISION NAME	MAX DEFAULT RATE DISCOUNT
1001	QAWASTE	
1002	CORPUS	
1003	DAYTON	
1004	HOUSTON	10%
1005	HILLSBORO	
1006	HEARNE	

## Manager User Division Assignment

1. Select the user account you would like to assign Divisions to from the upper grid.
2. Select the Divisions tab to display the list of divisions in the lower grid.
3. Use the toggle buttons associated to the divisions to either add or remove them from the user's account.

### Related Articles:

[Division Setup](#)

## Inactivate a User

To prevent unauthorized access from employees who have left, an employee's user account should be inactivated upon their employment end date.



Consider also removing an inactive or terminated employee from the Roles and Divisions to which they are assigned.

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DEPARTMENT

All

HIDE INACTIVE

☒

ID	STATUS	FIRST NAME	LAST NAME	EMAIL	PHONE	OFFICE PHONE	TITLE	DEPARTMENT	MANAGER	SALES GOAL TYPE	EXTERNAL ID	EXTERNAL USER ID	LAST LOGIN	CREATED BY
3	Active	Michael	Smith	michaels@...			Tech Guy	Admin		Revenue			8/19/25 1:...	
4	Active	Nikita	Ray	nikita@na...						Revenue			8/18/25 12...	
5	Active	Aliena	Somers	aliena@Fa...			Admin-NS	Sales	PG 2	Revenue			8/20/25 4:...	
6	Active	CT											5/10/24 5:...	
7	Active	Matthew											8/20/25 3:...	
8	Active	Dereck											8/20/25 4:...	
9	Active	Brad											8/19/25 10...	
11	Active	Chris											8/20/25 3:...	
12	Active	Holley											8/16/24 6:...	
13	Active	Dave											8/20/25 4:...	
22	Active	Isabel											8/19/25 8:...	

Roles

Divisions

Comm

ROLE ID

1018

1016

1015

1017

1000

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

LAST LOGIN

Aug 20, 2025 8:32 am

STATUS

Active

FIRST NAME

Aliena


LAST NAME

Somers


EMAIL

aliena@FakeEmail.com

MOBILE PHONE

 (999) 999-9999

OFFICE PHONE

 (999) 999-9999

TITLE

Admin-NS

DEPARTMENT

Sales

MANAGER

PG 2

SALES GOAL TYPE

Revenue

EXTERNAL ID

EXTERNAL USER ID

DEFAULT APP COLOR

Blue

WORKER COST PER HOUR LEVEL

Alert Notification Method

☒ In Application Popup
 ☐ Text Message
 ☐ Email

☐ Send Daily Activity Summary Email

DEFAULT HOMEPAGE

Recent Activity

ONLINE IMAGE

Select Image...

BROWSE...

AUTOMATIC COUNTERSIGN

No

SIGNATURE IMAGE

Select Image...

BROWSE...

RESEND EMAIL INVITATION

1. Double-click on the **user** to display the Edit User screen.
2. Select **Inactive** from the Status drop down field.
  - The system auto-saves upon selection.
3. Close the Edit User screen and confirm the Status column in the User Setup screen is now displaying as 'Inactive' for the affected user account.
  - By default, inactive accounts are hidden. Uncheck the 'Hide Inactive' check box from the top of the User Setup screen to search and view inactive user accounts.

## Related Articles:

[User Security Basics](#)

[Permission Setup](#)

[Role Setup](#)