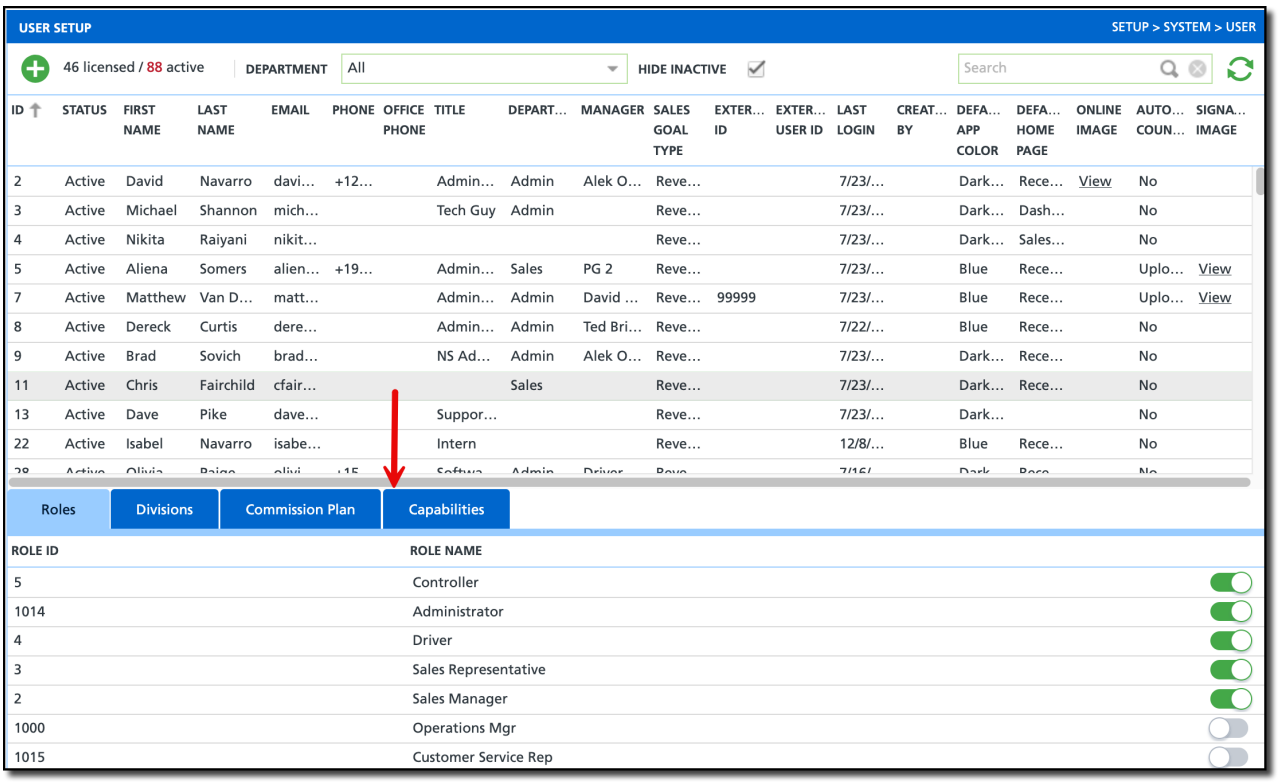
User Accounts

Last Modified on 08/26/2026 2:03 pm 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 automatically hides inactive accounts by default.



Users - Active vs Inactive and Licensing

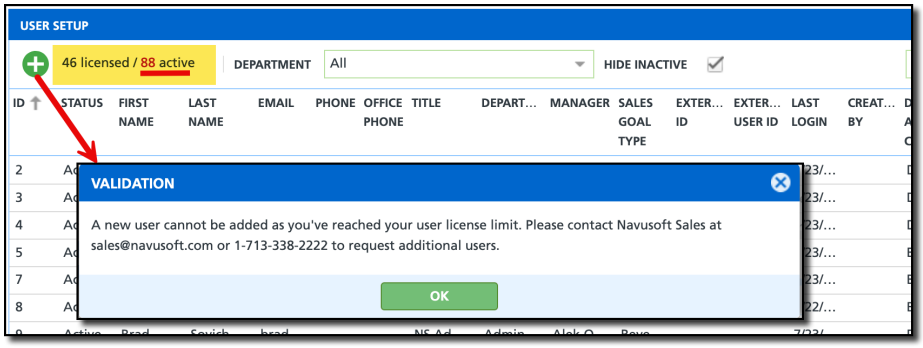
The number of active accounts allowed is based on the number of licenses granted defined in your contract. The totals are indicated in the top left corner of the page.

An **active** account allows users to access and use associated tools and features, while an **inactive** account indicates deactivated access.

An active user with the specific role of Helper, Crew Member, or Labor/Technician is **not included** in the active count with respect to licenses. The permissions associated with these roles are:

- Permission ID 313 - Assignable as Crew Member or Labor/Technician
- Permission ID 328 - Assignable as a Route Helper

If the active count is greater than or equal to the licensed count then you will not be able to add a user or change an inactive user to active. If this is the case, the error message shown below is displayed indicating you've reached the licensing limit and to please contact Navusoft Sales at sales@navusoft.com or 1-713-338-2222.



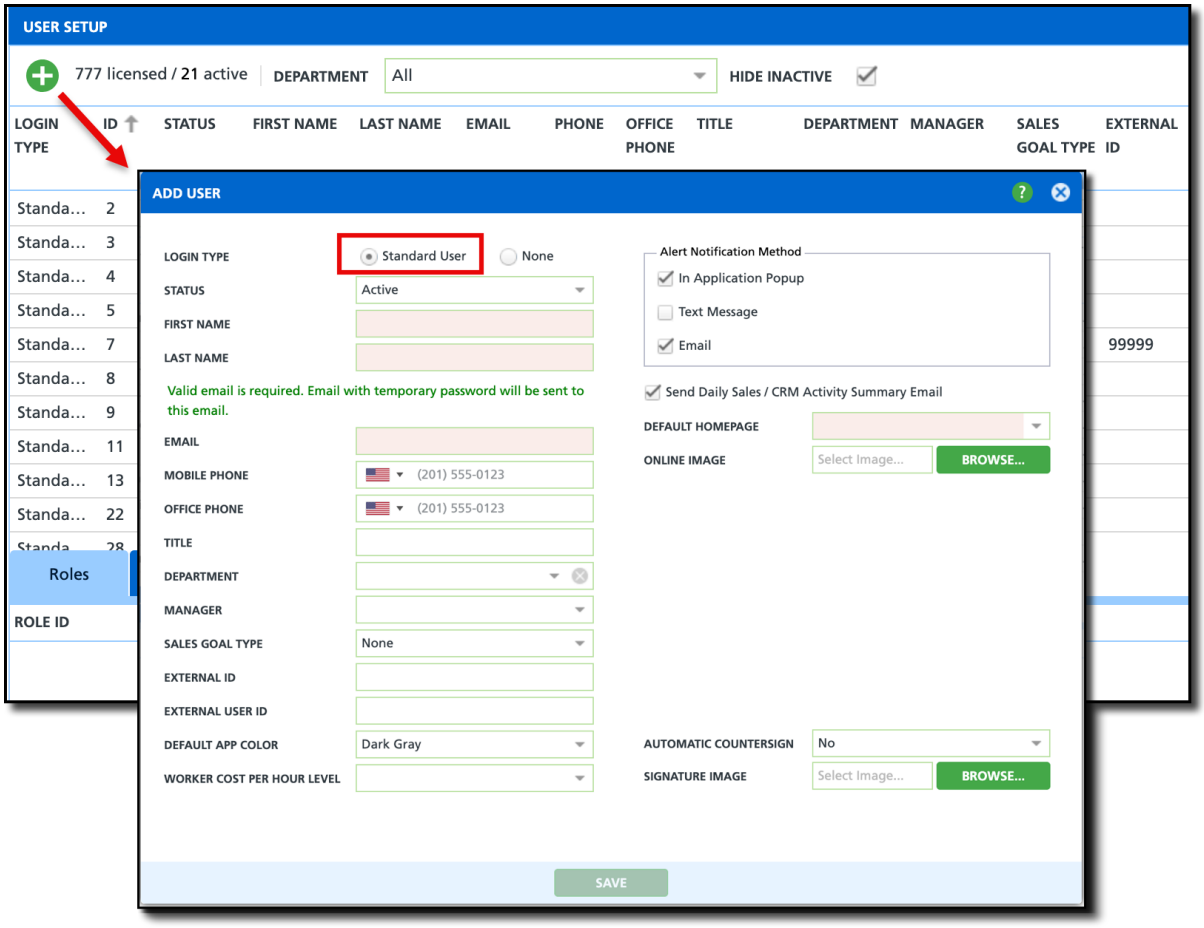
Add a New User

User accounts can be created **with or without login access**. Login access is determined by the **Login Type** selected when the account is created. This provides greater control over the active licensed user count by allowing accounts to be created without login access for users, such as Route Helpers, who do not need to log in to the system.

Add a Standard User

The following process applies to creating new **Standard User** accounts. A Standard User account provides login access to **Navusoft** and is included in the active licensed user count.

If a **Standard User** has logged in at least once, the account cannot be changed to a placeholder account without login access. Instead, inactivate the existing Standard User account and create a new account with **None** selected as the **Login Type**.

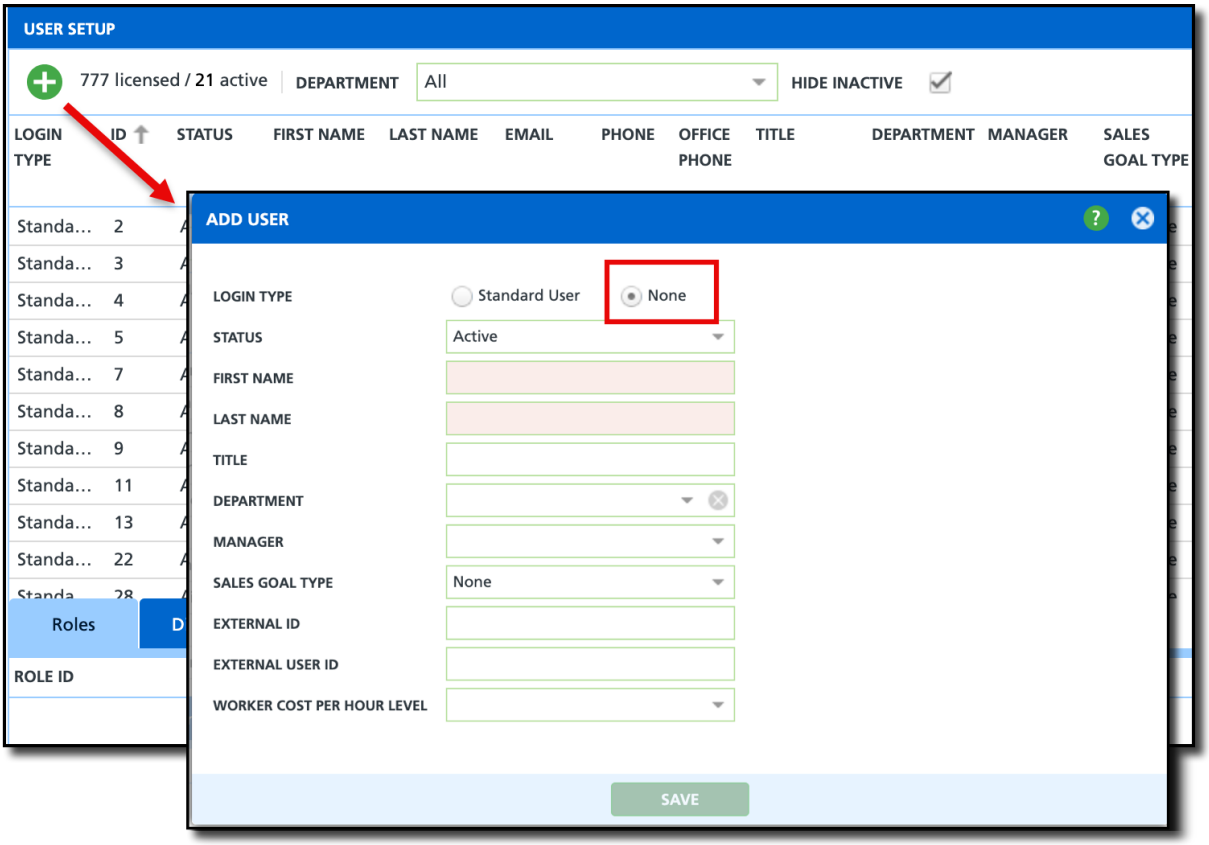


1. Select the **green plus icon** from the upper left corner of the screen and the **Add User** editor will display.
2. Select *Standard User* as the **Login Type**.
3. Enter a **Status** for the user. This field defaults to Active and when set to Inactive prevents a user from logging in.
4. Enter the user's name in the **First Name** and **Last Name** fields.
5. Enter an **Email** the user will use when logging in. For security reasons, we *recommended* using a business email rather than a personal one.
6. Select a **Default Homepage** for the user to see upon each login.
7. Complete any additional fields according to your company procedures (see **Field Descriptions** below).
8. Click **Save**.

Add a 'None' User

The following process outlines how to create a placeholder user account without login access. Placeholder user accounts are not included in the active licensed user count and may be used for roles such as Helpers and Sales Reps who need to be referenced within the system but do not require login access and therefore do not count toward the licensed user limit.

If a placeholder user later requires login access, the existing account must be inactivated and a new **Standard User** account created.

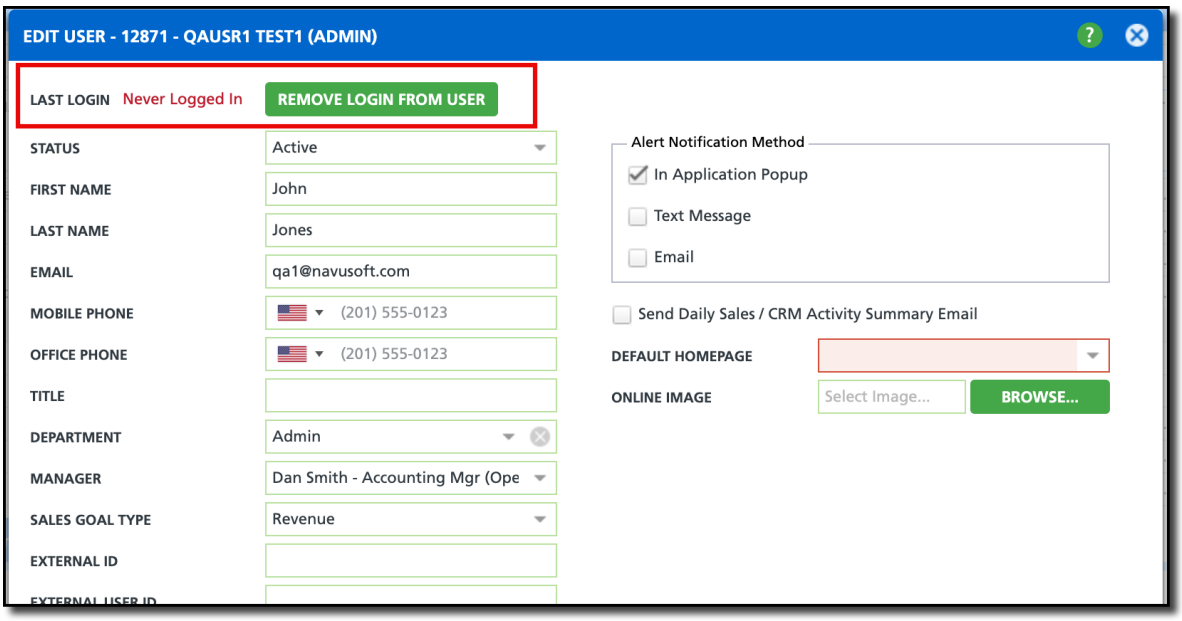


1. Select the **green plus icon** from the upper left corner of the screen and the **Add User** editor will display.
2. Select *None* as the **Login Type**.
3. Enter a **Status** for the user. This field defaults to Active and when set to Inactive prevents a user from logging in.
4. Enter the user's name in the **First Name** and **Last Name** fields.
5. Complete any additional fields according to your company procedures (see **Field Descriptions** below).
6. Click **Save**.

Remove Login From User

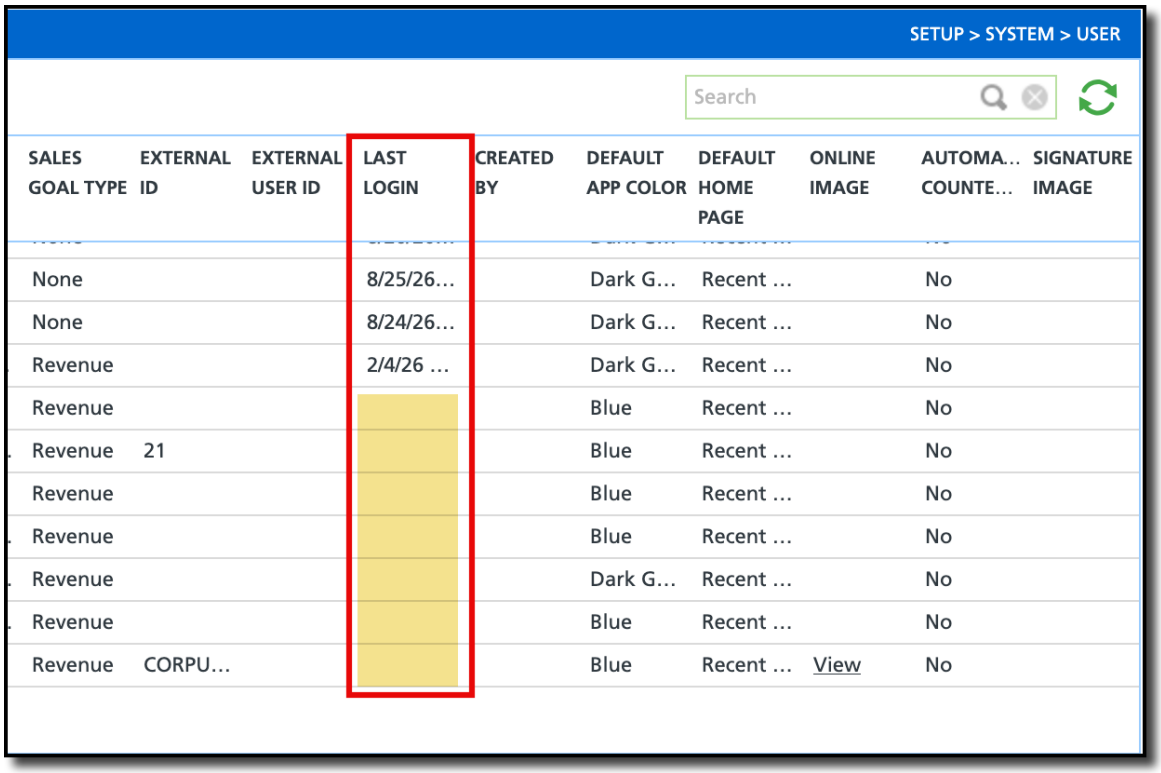
If a **Standard User** account has never been logged in to, it can be changed to a placeholder account without login access by clicking **Remove Login From User** on the **Edit User** screen. This button is available only for users who have never logged in and is displayed alongside the red **Never Logged In** indicator.

> ⚠ Once a user has logged in, the account **cannot** be changed to a placeholder account. Instead, the existing account must be inactivated and a new placeholder account created.



Find & Change Accounts That Haven't Been Logged Into

To identify user accounts that have never logged in and can be changed to a placeholder account, review the **Last Login** column on the User Setup screen. For accounts without a Last Login date, double-click the applicable row to open the account, then select **Remove Login From User.**



Field Descriptions

Field	Description

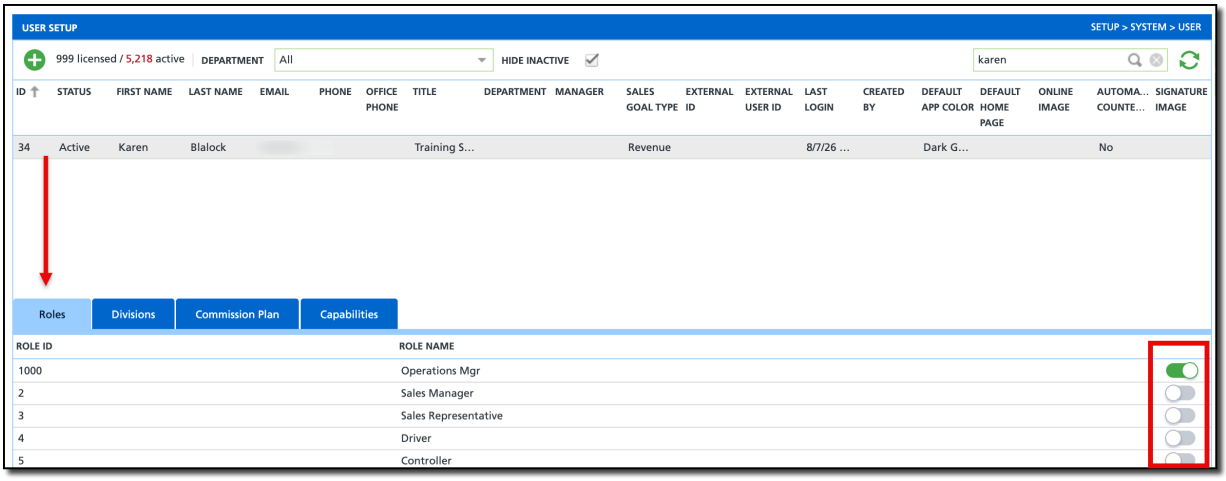
Login Type	Determines whether the user account has login access and whether the account is included in the active licensed user count total. Setup options include: • **Standard User:** user account is created **with** login access. • **None:** placeholder user account is created **without** login access. These accounts are typically used for Helpers and Sales Reps who need to be referenced within the system but do not require login access and therefore do not count toward the licensed user limit.
Status	The current state of the individual account within the system. An **active** account allows users to access and use associated tools and features, while an **inactive** account indicates deactivated access.
First Name / Last Name *Required*	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 *Required*	Enter a work email 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. *Example: Dispatch*
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: • Blue - Headers and tabs will display blue. • Dark Gray - Headers and tabs will display gray. • Dark Green - Headers and tabs will display green. *Users may also change their default app color from their User Profile.*
Worker Cost Per Hour	Option to record the worker's pay grade. Selection options for this drop down are created in *Setup > Operations > Equipment Maintenance > Worker Cost Per Hour*

Alert Notification Method	Identifies which method the user should receive alert notifications from the system. Options include: • In Application Popup • Text Message- Must be a valid phone number for a device that can receive text messages. • Email- A valid email address must be entered.
Send Daily Activity Summary Email	Emails a summary of the Recent Activity home screen to the user.
Default Homepage *Required*	Determines what homepage the user will see upon logging in to their application. Options include: • Dashboard • Recent Activity • Sales Representative ** 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.*
Online Image	Option to upload an image that will display in Navu Chat by the user's name. *Users may also change their online image from their User Profile.*
Automatic Countersign	Option for user's to enable automatic countersigning for contracts and other system prompted signature requests. *Users may update the Automatic Countersign option from their User Profile.*
Signature Image	If Automatic Countersign is set to 'Uploaded Signature', browse and upload the signature here. *Users may also update their signature image from their User Profile.*

Assign User Accounts to Roles

Roles are groupings 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.



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.

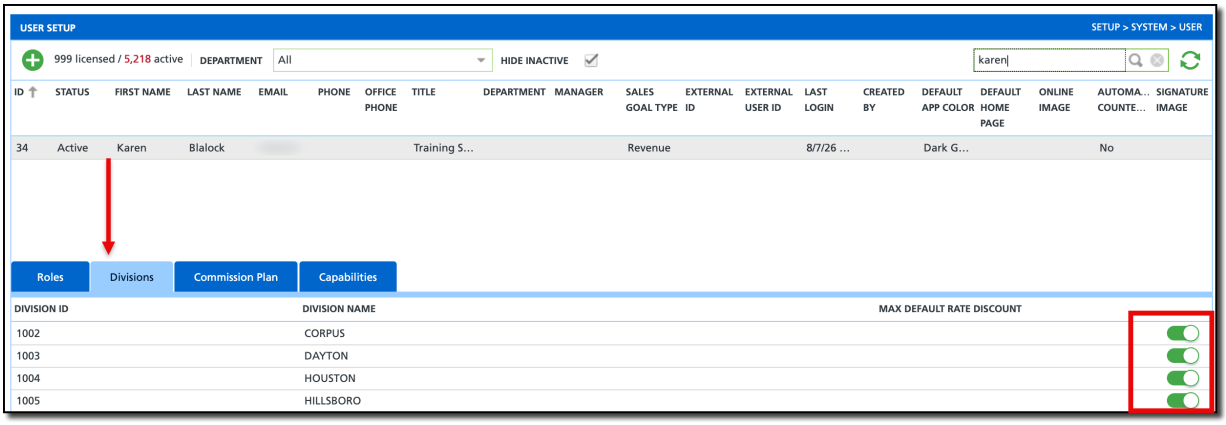
1. Click on the user account you would like to assign roles to from the upper grid.
2. Select the **Roles** tab to display the list of roles in the lower grid. All Roles that have been created in Setup > System > Role are listed.
3. Use the toggle buttons associated to the roles to either add or remove them from the user's account.

Related Articles

Role Setup
Permission Setup

Assign User Accounts to 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.



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.

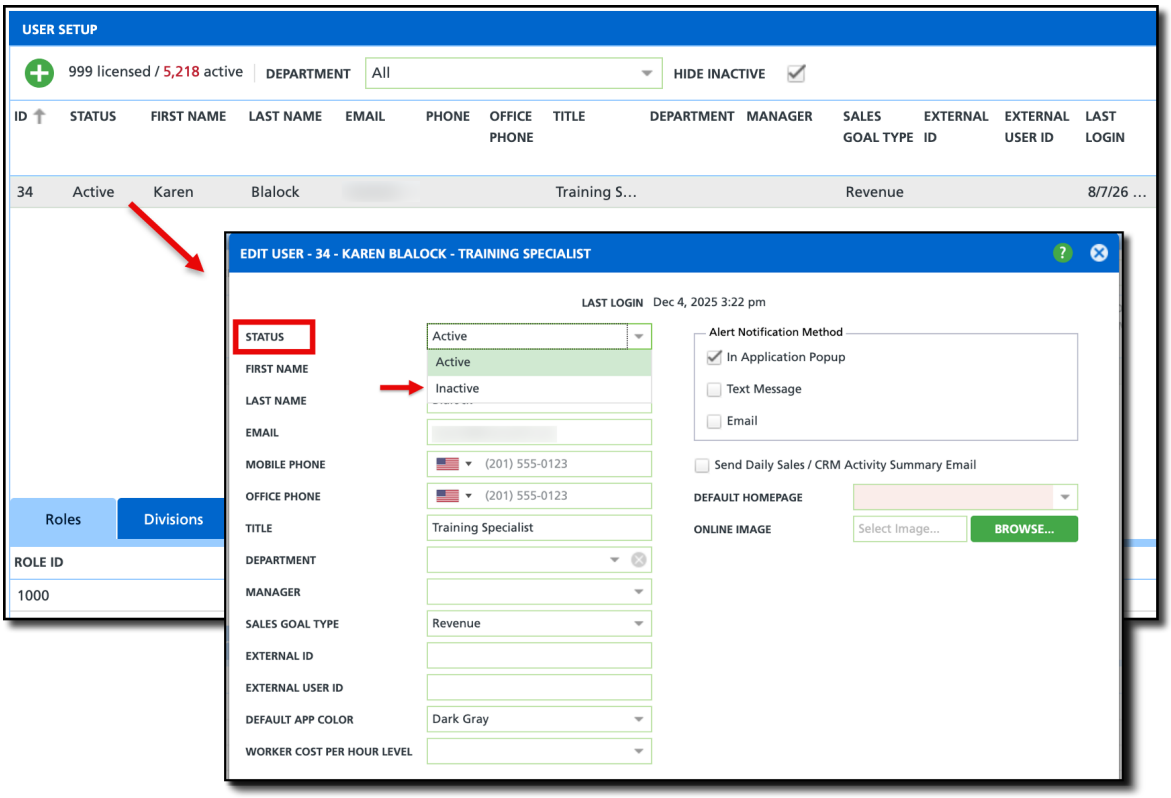
Related Articles

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.



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, if there is an available license.
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.

Note: 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.

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	
488	Add/Edit Users, User Roles, and User Division Access	Hides or displays the Users option on the Setup > System menu.

Related Articles

User Security Basics
Permission Setup
Role Setup