

User Accounts

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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.

The screenshot shows the 'USER SETUP' interface. At the top, there is a search bar and a 'HIDE INACTIVE' checkbox. Below this is a table of users with columns for 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, and SIGNATURE IMAGE. A red arrow points to the 'PHONE' column header. Below the user list are tabs for 'Roles', 'Divisions', 'Commission Plan', and 'Capabilities'. The 'Roles' tab is active, showing a list of roles with toggle switches on the right.

| ROLE ID | ROLE NAME | Toggle |
|---------|--------------------------|--------|
| 1018 | Customer Service Manager | On |
| 1000 | Operations Mgr | On |
| 3 | Sales Representative | On |
| 2 | Sales Manager | On |
| 1022 | Technician-Assignment | On |
| 1021 | Helper-Assignment | On |
| 1019 | Crew/Labor/Technician | On |
| 1017 | Billing Mgr | On |
| 1016 | Dispatcher | On |
| 1015 | Customer Service Rep | On |
| 1014 | Administrator | On |
| 5 | Controller | On |
| 1020 | Driver-Assignment | On |
| 4 | Driver | On |

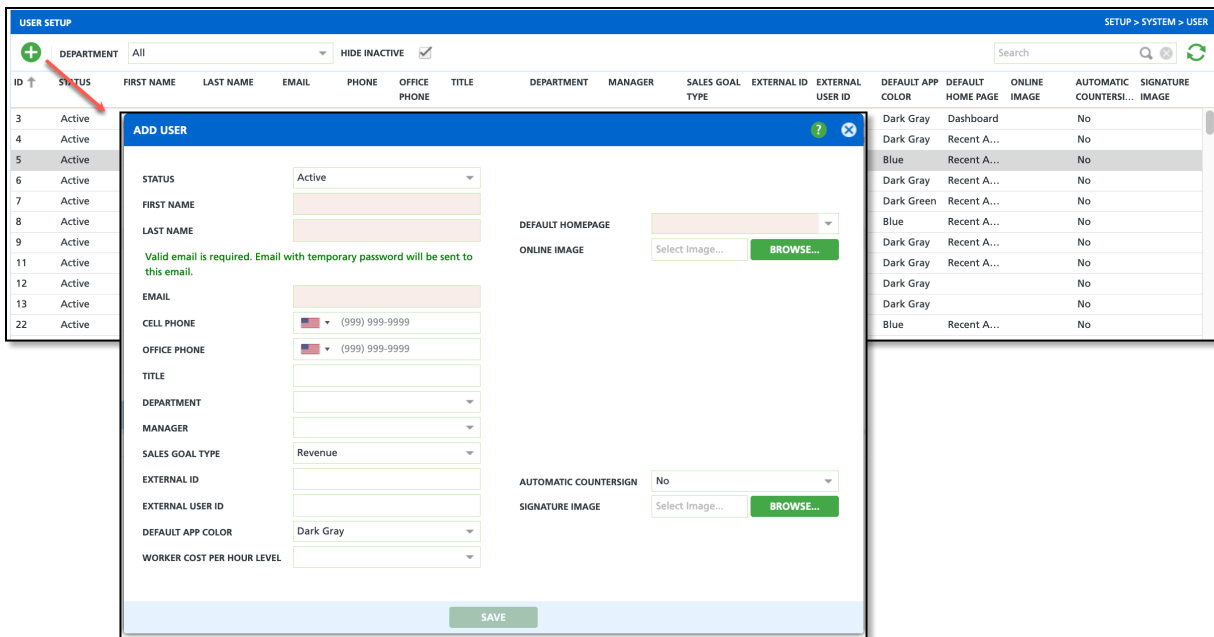
Permissions

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.



Field Descriptions

| Field | Description |
|--|---|
| Status | Status refers to 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 <i>Required</i> | 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 <i>Required</i> | Enter a <u>work email</u> for the user. |
| Cell 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"> • Blue - Headers and tabs will display blue. • Dark Gray - Headers and tabs will display gray. • Dark Green - Headers and tabs will display green. <p><i>Users may also change their default app color from their User Profile.</i></p> |
| Worker Cost Per Hour | Option to record the worker's pay grade. Selection options for this dropdown are created in <i>Setup > Operations > Equipment Maintenance > Worker Cost Per Hour</i> |

| | |
|--|---|
| <p>Default Homepage <i>Required</i></p> | <p>Determines what homepage the user will see upon logging in to their application. Options include:</p> <ul style="list-style-type: none"> • Dashboard • Recent Activity • Sales Representative <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> |
| <p>Online Image</p> | <p>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></p> |
| <p>Automatic Countersign</p> | <p>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></p> |
| <p>Signature Image</p> | <p>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></p> |

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 | |
|------------|--------|------------|---------------|--------------|-------|--------------|------------------|------------|-------------|-----------------|-------------|------------------|-------------------|-------------------|--------------|-----------------------|-----------------------|--|
| 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 | | |

| 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 | | | | | | | | | | | | | | | | | 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 | Emilio | Nataran | emilio@E... | 78121 | | 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.

The screenshot displays the 'USER SETUP' interface. At the top, there's a 'DEPARTMENT' dropdown set to 'All' and a 'HIDE INACTIVE' checkbox which is checked. Below this is a table of users. User ID 5, Aliena Somers, is highlighted. A modal window titled 'EDIT USER - 5 - ALIENA SOMERS (ADMIN-NS)' is open over her record. In this modal, the 'STATUS' dropdown menu is open and 'Inactive' is selected, highlighted with a red rectangle. Other fields in the modal include First Name (Aliena), Last Name (Somers), Email (aliena@FakeEmail.com), Title (Admin-NS), Department (Admin), and Manager (on System - House Account (Sales)). There are also fields for phone numbers, external IDs, and default app colors. A 'RESEND EMAIL INVITATION' button is located at the bottom of the modal.

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](#)