Role Setup

Last Modified on 08/20/2025 10:48 am PDT

Pathway: *Setup > System > Role*

Roles in the Navusoft application serve as collections of permissions necessary for users to access and operate within the system. Navusoft offers a predefined set of roles that are readily available for assignment to user accounts. These roles, as established by Navusoft, can be modified, edited, or tailored to align with the specific requirements and preferences of individual companies. This customization feature empowers organizations to finely adjust access privileges based on the unique needs of their users and operational structure.

ROLE ID	ROLE NAME	EDIT SERVICE PAST DAYS LIMIT	AUTOMATICALLY POST ADJUSTMENT	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	$ 100.00	$ 400.00	$ 1,000.00		361	6	0	1	0%	⊖
2	Sales Manager	7	$ 100.00	$ 0.00		5%	174	155	38	1	0%	⊖
3	Sales Representative	7	$ 4.00	$ 0.00		7%	92	238	37	6	0%	⊖
4	Driver	1	$ 0.00	$ 0.00			11	317	39	94	0%	⊖
5	Controller	0	$ 0.00	$ 0.00			99	230	38	3	0%	⊖
1000	Operations Mgr	30	$ 0.00	$ 0.00			140	191	36	11	1%	⊖
1014	Administrator	90	$ 500.00	$ 400.00	$ 30.00		329	10	28	5	0%	⊖
1015	Customer Service Rep	30	$ 15.00	$ 15.00	$ 20.00		108	219	40	11	4%	⊖
1016	Dispatcher	30	$ 10.00	$ 0.00			155	176	36	8	8%	⊖
1017	Billing Mgr	95	$ 150.00	$ 210.00	$ 50.00	30%	221	111	35	6	0%	⊖
1018	Customer Service Manager	65	$ 100.00	$ 100.00			153	178	36	1	5%	⊖
1019	Crew/Labor/Technician	7	$ 0.00	$ 0.00			2	334	31	0		⊖
1020	Driver-Assignment	7	$ 0.00	$ 0.00			3	333	31	1		⊖

Permissions | Users

AUTHORIZATION All ▼   EXPAND ALL   COLLAPSE ALL   Search   🔍 ⊗

PERMISSION NAME	PERMISSION ID	AUTHORIZATION STATUS
▶ 📁 Accounting		
▶ 📁 Accounts		
▶ 📁 Dashboard		
▶ 📁 Database		
▶ 📁 Help		
▼ 📁 Operations		
📄 Active Dispatch	389	Authorized
📄 Add Charge Code to Work Order	334	Authorized
📄 Add Manual Label to Work Order	299	Authorized
📄 Add/Edit Account Safety Profile	408	Authorized
📄 Adjust Site Inventory	222	Authorized
📄 Adjust Tank Inventory	172	Authorized
📄 Adjust Yard Inventory	220	Authorized
📄 Approve Work Order Label Exception	317	Authorized

Permissions

The following permissions are required to add and edit Role Setup:

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

Field Descriptions

The following fields display on the Roles Setup screen. To edit a role, double-click within its row.

Field	Description
Role ID	The individual role's ID.
Role Name	The name of the role.
Edit Service Past Days Limit	Limits the number of days after a service has been completed the service record can be edited.

Automatically Post Adjustment Limit	Sets the maximum amount a user can post for an invoice adjustment. If this field is left empty, no limit applies. If an entered adjustment meets or exceeds this value, a message will notify the user of the limit, and the adjustment will not be posted. This setting only applies to the Invoice Adjustment screen in AR History.
Adjustment Approval Limit	Defines the maximum amount a user can approve for an invoice adjustment and hides the approve, deny, and edit options for pending adjustments on the Adjustment History and Pending Approval screen if the adjustment exceeds the user's approval limit set here. If this field is left empty, no limit applies. Consider reserving this limit to only admin level roles. This setting only applies to the Adjustment History and Pending Approval screen.
Max Default Rate Discount	Limits the discount amount a user can apply if discounts are enabled on the service code.
Authorized Permissions	The total count of permissions the role includes. Any user assigned to the role will receive all the permissions it includes.
Not Authorized Permissions	The total count of permissions not included in the role.
New Permissions	The total count of permissions that are new to the application and should be reviewed for each role. New permissions must be manually added to a role.
Active User Count	The total count of user accounts that have an active account status AND are assigned to the role.
Documentation View Score	The measurement of documentation use among the users. Select the percentage value displayed to review who has accessed the documentation.

Tab Descriptions

Single-click on a role to open the Permissions and Users tab-set to add and edit the permissions and users of a role.

Permissions

Displays a list of all permissions that can be assigned to a role. Select a role to view the permission list.

Screen Descriptions

Field/Button	Description
Authorization	Filters permissions based on the Authorization Status (New, Authorized, Not Authorized).
Expand All/Collapse All	Option to expand or collapse the module list.
Permission Name / Permission ID	Displays the name and ID of the permission associated to the module.
Authorization Status	Displays the current authorization of the permission for the role. To change the status, click within the column and select the authorization status that applies. • **New:** Permission is related to a new enhancement and must be manually added to the role(s) it applies. • **Authorized:** Permission was applied to the role and any user assigned to the role will have the permission. • **Not Authorized:** Permission is not applied to the role. The background color shown on the screen for each permission indicates the authorization status associated with the role.

Users

Displays a list of all active and inactive user accounts that can be added or removed from each role. Select a role to view the list of user accounts.

> **Best practice tip:** consider removing inactive user accounts from all Roles they are assigned to prevent security breaches.

ROLE SETUP										SETUP > SYSTEM > ROLE

ROLE ID	ROLE NAME	EDIT SERVICE PAST DAYS LIMIT	INVOICE ADJUSTMENT LIMIT	ADJUSTMENT 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	$ 5.00	$ 1,000,000.00		354	0	0	0		⊖
2	Sales Manager	7	$ 100.00	$ 0.00		176	158	20	2	8%	⊖
3	Sales Representative	7	$ 4.00	$ 0.00		90	245	19	10	0%	⊖
4	Driver	0	$ 0.00	$ 0.00		11	323	20	92	0%	⊖
5	Controller	0	$ 0.00	$ 0.00		98	237	19	3	0%	⊖
1000	Operations Mgr	30	$ 0.00	$ 0.00		141	195	18	10	2%	⊖
1014	Administrator	90	$ 200.00	$ 99,999.00		333	8	13	10	1%	⊖
1015	Customer Service Rep	30	$ 15.00	$ 15.00		110	223	21	10	5%	⊖
1016	Dispatcher	30	$ 10.00	$ 0.00		158	178	18	8	10%	⊖
1017	Billing Mgr	90	$ 1,500.00	$ 500.00		228	107	19	6	0%	⊖
1018	Customer Service Manager	60	$ 50.00	$ 0.00		156	180	18	1	5%	⊖
1019	Crew/Labor/Technician	7	$ 0.00	$ 0.00		1	341	12	0		⊖

Permissions | **Users**

				COUNT	8

USER ID ↑	USER NAME	TITLE	STATUS	
4736	Gabriel Guavo	Dispatcher	Active	🟢
3757	Alice Carter	CSR	Active	🟢
4555	Ferlin June	Dispatcher	Active	🟢
3902	Robert Smith	General Manager	Active	🟢
3765	Samantha Trenton	Dispatcher	Active	🟢
3775	Michael Trenton	Dispatcher	Active	🟢
4429	FWS_Test User	Test	Active	🟢
4336	Julio Lemu	Ops Supervisor	Active	🟢
2005	Test2 Dispatcher User	Dispatch	Active	⚪
3433	House Acct non System	House Account	Active	⚪
3435	Ted Brendt	IT & Reporting	Active	⚪
3754	Barbara Kemp	Office Manager	Active	⚪

Screen Descriptions

Field	Description
User ID / User Name	Identification fields to identify the user account.
Title	Displays the role of the user, identified in their user profile.
Status	Indicates the current status of the user account (displays either 'Active' or 'Inactive').
Add/Remove Toggles	Use the toggle button associated with the user to either add or remove a user from an account.

Add a New Role

To add a new role, select the green plus icon in the upper left corner of the Role Setup screen to display the Add Role editor.

ROLE SETUP

ROLE ID	ROLE NAME	EDIT SERVICE PAST DAYS LIMIT	AUTOMATICALLY POST ADJUSTMENT LIMIT	ADJUSTME...
1	Navusoft Admin and Support	99	$ 100.00	
2	Sales Manager	7	$ 100.00	
3	Sales Repres		$ 4.00	
4	Driver		$ 0.00	
5	Controller		$ 0.00	
1000	Operations		$ 0.00	
1014	Administrato		$ 500.00	
1015	Customer Se		$ 15.00	
1016	Dispatcher		$ 10.00	
1017	Billing Mgr		$ 150.00	
1018	Customer Se		$ 100.00	
1019	Crew/Labor/		$ 0.00	
1020	Driver-Assign		$ 0.00	
1021	Helper-Assig		$ 0.00	
1022	Technician-A		$ 0.00	
1023	test		$ 80.00	

ADD ROLE

ROLE NAME	
EDIT SERVICE PAST DAYS LIMIT	7
AUTOMATICALLY POST ADJUSTMENT LIMIT	
ADJUSTMENT APPROVAL LIMIT	0.00
REFUND APPROVAL LIMIT	
MAX DEFAULT RATE DISCOUNT	
ROLE DESCRIPTION	

SAVE

Field Descriptions

Field	Description
Role Name	Identifies the role.
Edit Service Past Days Limit	Limits the number of days after a service has been completed that the service record can be edited.
Automatically Post Adjustment Limit	Sets the maximum amount a user can post for an invoice adjustment. If this field is left empty, no limit applies. If an entered adjustment meets or exceeds this value, a message will notify the user of the limit, and the adjustment will not be posted. Further information on invoice adjustments, including additional setup can be reviewed here: Adjustment History and Pending Approval and View Details / Adjust Invoice.
Adjustment Approval Limit	Sets a limit on the amount a user in this role can approve invoice adjustment made by other users. Adjustments are approved in the *Adjustment History and Pending Approval* screen. Consider restricting this limit to roles with admin-level privileges.
Refund Approval Limit	Sets a limit on the amount a user in this role can approve refund requests submitted by others. Refunds are approved in the *Refund Request Management* screen. Consider restricting this limit to roles with admin-level privileges. *This field only display in the Add/Update Role popup editor and not on the main Role Setup screen.*
Max Default Rate Discount	Limits the discount amount a user can apply if discounts are enabled on the service code.

Role Description	Option to include a note regarding the role such as who it specifically applies to. Descriptions display upon hovering your mouse over the name of the role.

Add Role

1. Select the green add icon to open the 'Add Role' popup window.
2. Enter a **Role Name**. This is the only required field to add a new role.
3. Adjust the **Edit Service Past Days Limit** to fit within the requirements of the role *(Optional)*.
4. Adjust the **Automatically Post Adjustment Limit** to fit within the requirements of the role *(Optional)*.
5. Adjust the **Adjustment Approval Limit** to fit within the requirements of the role *(Optional)*.
6. Adjust the **Max Default Rate Discount** to fit within the requirements of the role *(Optional)*.
7. Enter a **Role Description** (optional). Anything entered here will display when hovering the cursor over the name of the role.
8. Click **Save** when finished.

Delete a Role

If a role is no longer needed, the option to delete is available. When a role is deleted, the role and any permission it granted is removed from all user accounts linked to it.

> 🔔 Before deleting a role, consider reviewing the Active User Count, Users, and Permissions the role included.

ROLE SETUP   SETUP > SYSTEM > ROLE

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1	Navusoft Admin and Support	99	$ 5.00	$ 1,000,000.00		346	6	2	0		⊖
2	Sales Manager	7	$ 100.00	$ 0.00		176	160	18	2	9%	⊖
3	Sales Representative	7	$ 4.00	$ 0.00		90	247	17	10	0%	⊖
4	Driver	0	$ 0.00	$ 0.00		11	326	17	92	0%	⊖
5	Controller	0	$ 0.00	$ 0.00		98	239	17	3	0%	⊖
1000	Operations Mgr	30	$ 0.00	$ 0.00		141	197	16	10	2%	⊖
1014	Administrator	90	$ 200.00	$ 99,999.00		333	8	13	10	1%	⊖
1015	Customer Service Rep	30	$ 15.00	$ 15.00		110	225	19	10	5%	⊖
1016	Dispatcher	30	$ 10.00	$ 0.00		158	180	16	8	11%	⊖
1017	Billing Mgr	90	$ 1,500.00	$ 500.00		229	108	17	6	0%	⊖
1018	Customer Service Manager	60	$ 50.00	$ 0.00		156	182	16	1	5%	⊖
1019	Crew/Labor/Technician	7	$ 0.00	$ 0.00		1	343	10	0		⊖
1020	Driver-Assignment	7	$ 0.00	$ 0.00		2	342	10	1		⊖
1021	Helper-Assignment	7	$ 0.00	$ 0.00		1	343	10	0		⊖
1022	Technician-Assignment	7	$ 0.00	$ 0.00		1	344	9	0		⊖

Related Articles

Understanding the Basics (User Security)
User Accounts
Permission Setup