

# Edit Account and Site Information

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Pathway: Accounts > Search - Customer Service Screen

Efficiently modify details for either a parent account or a site by using right-click functionality to access the account and site editor screens.

41898

Navusoft Premier Waste And Recycling

50

8100 Washington Ave  
Houston, TX 77007-1062

Active

DIVISION DAYTON

ACCOUNT MGR House Acct non System

CLASS COMMERCIAL

BILL GROUP DAY-BAD DEBT \ INACTIVE

Arrears - Monthly Billed Thru Date Dec 19, 2023

CURRENT

1-30

31-60

61-90

91-120

120+

TOTAL

-51.00

135.92

0.00

649.95

0.00

222.00

956.87

41898002

Navusoft - Demo Site 2

2 of 2

8100 Washington Ave  
Houston, TX 77007-1062  
Harris County Washington Avenue Coalitio  
US  
+1 713-338-2222

Inactive

DIVISION DAYTON

SERVICE REGION DAYTON OPEN MARKET

SALES REP House Account

BILL GROUP DAY-ROLF BI-WEEKLY

Arrears - Twice a month Billed Thru Date None

Next Invoice Date Feb 16, 2023 BATCH-25667 (in progress) - No

HIGHLIGHTS

PENDING

Account is significantly past due

ACTIVE SERVICES

Standard

TOTAL RECURRING

QTY

SERVICE CODE

SERVICE ID

FREQUENCY

SCHEDULE

RATE

START DATE

END DATE

CONTRACT EXP

WO MIN

CALENDAR

January, 2024

EVENTS

SUN

MON

TUE

WED

THU

FRI

SAT

Dec 31, 2023

New Years Day

Jan 1

Jan 2

Jan 3

Jan 4

Jan 5

Jan 6

Jan 7

Jan 8

Jan 9

Jan 10

Jan 11

Jan 12

Jan 13

Jan 14

Jan 15

Jan 16

Jan 17

Jan 18

Jan 19

Jan 20

## Permissions

The following permissions are required to view and edit account and site information:

Permission ID	Permission Name
5	View Account
6	View Site
68	Edit Non-Prospect Account
69	Edit Non - Prospect Site

## Edit Account Details

Information located along the left side of the Customer Service screen is account-level information and applies to all sites under an account. Right-click within the account area and select Edit to open the Edit Account editor.

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41898 Navusoft Premier Waste And Recycling

41898002 Navusoft - Demo Site 2

50

8100 Washington Ave  
Houston, TX 77007-1062

3

Right Click

Edit

View

Active

DIVISION

DAYTON

ACCOUNT MGR

House Acct non System

CLASS

COMMERCIAL

BILL GROUP

DAY-BAD DEBT \ INACTIVE

Arrears - Monthly

Billed Thru Date Dec 19, 2023

Next Invoice Date

INVOICE BY EMAIL

No

TERMS

Net 20

SOURCE

Cold Call

REBATE PAYMENT TYPE

Not Applicable

2 of 2

8100 Washington Ave  
Houston, TX 77007-1062  
Harris County Washington Avenue Coaliti  
US  
+1 713-338-2222

ACCESS

NOTE delete

CURRENT	1-30	31-60	61-90	91-120	120+	TOTAL
-51.00	135.92	0.00	649.95	0.00	222.00	956.87

HIGHLIGHTS

PENDING

!

Account is significantly past due

ACTIVE SERVICES (0)

Standard

TOTAL RECURRING

QTY	SERVICE CODE	SERVICE ID	FREQUENCY	SCHEDULE	RATE	START DATE
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CALENDAR

January, 2024

EVENTS

## Edit Account: Account

The Account tab includes vital account details like contact information, account name, account status, and other essential information for accounting and operational purposes.

EDIT ACCOUNT

Account

Settings

NAME

Navusoft Premier Waste And Recycling

NAME 2

ADDRESS LINE 1

8100 Washington Ave

ADDRESS LINE 2

CITY/STATE/POSTAL CODE

Houston TX 77007-1

PHONE

(207) 555-5555

ATTN

BILLING PHONE

(999) 999-9999

FAX

(999) 999-9999

BILLING CONTACT 1

BILLING CONTACT 2

John Doe (Contact@fakeEmail.com)

PARENT ACCOUNT

STATUS

Active

DIVISION

DAYTON

SOURCE

Cold Call

ACCOUNT MANAGER

House Acct non System

ACCOUNT CLASS

COMMERCIAL

AUDITOR

WEBSITE

LOGO

Select logo... BROWSE...

OLD ID

SAVE

## Field Descriptions

Field	Description
Contact Information (Name, Address, Phone)	The contact information for the account.
Billing Phone	Designated contact phone number associated with a customer or account that is primarily used for billing-related communications and inquiries. <i>*Field does not display if the Account Class 'Type' setting is 'Residential.'</i>

Field	Description
Fax	Number field to enter a number for a fax machine. <i>*Field does not display if the Account Class 'Type' setting is 'Residential.'</i>
Billing Contact 1 and 2	Designates the preferred contact for billing-related inquiries. To appear in the dropdown list, an individual must first be added as a contact.
Parent Account	Entry field to identify a parent account. <i>*Field does not display if the Account Class 'Type' setting is 'Residential.'</i>
Status	Displays the current status of the account. Select the drop down and follow the steps to assign a new status.
Division	The region the account belongs to. The division the account is assigned determines who handles the account in other areas such as Operations and Accounting.
Source	Indicates how the account originated and helps with future sales and marketing campaigns.
Account Manager	Identifies the person overseeing the account (possibly the salesperson) and is considered the account's point of contact for changes in service.
Account Class	Indicates if the account is Commercial, Residential, Municipal, Broker, etc.
Website	Option to link the account's website to the account's information. <i>*Field does not display if the Account Class 'Type' setting is 'Residential.'</i>
Logo	Option to upload the account's logo. <i>*Field does not display if the Account Class 'Type' setting is 'Residential.'</i>
Old ID	Option the enter the account's ID from its legacy system.

## Edit Account: Settings

The Settings tab establishes the billing requirements for the account and sites belonging to it.

EDIT ACCOUNT

Account

Settings

Billing

BILL GROUP

QA Billing Cycle

Advance - Monthly

Billed Thru Date None

Next Invoice Date Jul 01, 2024 BATCH-25880 (not started)

INVOICE BY EMAIL

No

TERM

COD

CREDIT LIMIT

PAPER BILL FEE

\$ 8.00 (Default \$ 10.00)

BILL BY SITE

AUTO STATUS UPDATE

APPLY FINANCE CHARGES

EXCLUDE FROM PAYMENT PROCESSING FEE

EXCLUDE FROM PAST DUE NOTIFICATION

HIDE WORK ORDER FORMAT RATE

INBOUND ORDER AUTO PRINT

AP

DEFAULT WALLET

ACH

PAYEE NAME

1099

INSTRUCTIONS

WARNING ON OPEN

SAVE

## Field Descriptions

Field	Description
Bill Group	Division specific billing group the account is placed in.
Invoice By Email	This setting determines the method of invoice delivery: either as a PDF attachment or via email as a link. Choosing 'No' restricts the invoice to be printed and mailed as the only delivery option.
Term	Indicates the length of time the customer has to pay.
Credit Limit	Indicates the highest total outstanding balance the customer is allowed to accumulate without making further payments.
Paper Bill Fee	Displays if 'Invoice By Email' is disabled. Setup can be reviewed here: <a href="#">Paper Bill Fee Setup</a> .
Bill By Site	Select the check box and one invoice will generate for each location. If unchecked, one invoice generates for all sites.
Auto Status Update	Check the box, and the account will adhere to the default settings, which determine when the account will be placed in a Credit Hold status based on the number of days past due and the amount past due.
Apply Finance Charges	Checking the box will cause the account to adhere to the default finance charge settings set by the Account Class.
Exclude from Payment Processing Fee	By checking the box, you ensure that no credit card fee will be charged to the account.
Exclude From Past Due Notification	Checking the box will prevent the account from receiving past-due notification letters.
Hide Work Order Format Rate	Check the box to hide rates on scale tickets or work orders that support rate printing.
Inbound Order Auto Print	Mark the checkbox to trigger the automatic display of the print window after marking an inbound ticket as complete.
AP (Accounts Payable)	
Default Payment Method	Specifies the preferred or default method that the account uses to receive payments.
Payee Name	Refers to the name of the individual or business entity to whom payments are made.
1099	If checked, signifies that payments made to this account may be subject to 1099 reporting.
Instructions	Option to provide supplemental instructions for an account's AP.
Other	
Warning on Open	Information entered here will be shown every time the account is accessed.

## Account Custom Settings Properties (gear icon)

Option to add custom settings at the account level.

## Edit Site Details

Information located on the right side of the customer screen is information specific to the site currently being viewed. Right-click within the site area and select 'Edit' to open the Edit Site popup editor.

The screenshot shows the Navusoft customer screen for '41898002 Navusoft - Demo Site 2'. The site is marked as 'Active' with a green checkmark. The address is '8100 Washington Ave, Houston, TX 77007-1062, Harris County Washington Avenue Coalitic US'. The site is 'Inactive' with a red X icon. The context menu shows 'Edit' and 'View' options. The site details include: DIVISION: DAYTON, ACCOUNT MGR: House Acct non System, CLASS: COMMERCIAL, BILL GROUP: DAY-BAD DEBT \ INACTIVE, Arrears - Monthly, Billed Thru Date Dec 19, 2023. The billing summary shows: 61-90: 649.95, 91-120: 0.00, 120+: 222.00, TOTAL: 956.87. The status is 'PENDING'. The table below shows the recurring billing details.

SERVICE ID	FREQUENCY	SCHEDULE	RATE	START DATE	END DATE	CONTRACT EXP.	WO MIN.
TOTAL RECURRING							

## Edit Site : Basic Settings

The Basic Settings tab includes vital site details like address, site name, notes, and other essential information for accounting and operational purposes.

The screenshot shows the 'EDIT SITE' form with the 'Basic Settings' tab selected. The form contains the following fields:

- NAME: Navusoft - Demo
- NAME 2:
- ADDRESS LINE 1: Post Oak Blvd
- ADDRESS LINE 2:
- CITY/STATE/POSTAL CODE: Houston, TX, 77057
- PHONE 1: (626) 777-7777, Office
- PHONE 2: (999) 999-9999
- OLD ID:
- PO#:
- SIGNATURE REQUIRED: ☐ LEED REPORTABLE: ☐
- NOTE: Site Notes
- WARNING ON OPEN: Site warning
- ACCESS INFORMATION: Gate Code 1234
- BUSINESS HOURS / SERVICE WINDOW:

The right side of the form contains the following fields:

- DIVISION: CORPUS
- SERVICE REGION: CORPUS OPEN MARKET
- TAX REGION: CC CITY-NUECES COU-CC MTA-CC
- ORIGIN:
- SOURCE: Cold Call
- SALES REP: House Acct non System
- SITE CLASS:
- GENERATOR: Not Applicable
- EPA:
- STATE ID:
- ADDITIONAL SERVICE MINUTES:

The form has a 'SAVE' button at the bottom.

## Field Descriptions

Field	Description
<b>Contact/Location Information (Name, Address, Phone)</b>	Contact and location information for the site.
<b>Signature Required</b>	If selected, the driver will be required to collect a signature each time they service the location.
<b>Old ID</b>	The old identification number of the site from its legacy system.
<b>PO #</b>	The post office box number for the site.
<b>Signature Required</b>	If selected, the driver will be required to collect a signature each time they service the location.
<b>Service Region</b>	Identifies the region the site belongs to.
<b>Tax Region</b>	Identifies the tax region the site belongs to.
<b>Note</b>	Displays in the site details section when viewing the Customer screen.
<b>Warning on Open</b>	Displays as a site-specific pop-up warning anytime the site is accessed.
<b>Access Information</b>	Used for conveying information the driver will need to access a location. Displays in the driver app on the service record.
<b>Business Hours / Service Window</b>	Identifies the hours of business for the site.
<b>Division</b>	Identifies the Division the site is in.
<b>Service Region</b>	Identifies the Service Region the site services.
<b>Tax Region</b>	Identifies the Tax Region that the site is in.
<b>Origin</b>	The origin location of the site.
<b>Source</b>	The source used to acquire the site.
<b>Sales Rep</b>	The Sales Rep that acquired the sites business.
<b>Site Class</b>	The Site Class the site is included in.
<b>Generator</b>	The amount of waste expected to be generated by this site.
<b>EPA</b>	The EPA ID for the site location.
<b>State ID</b>	The State ID for the site location.

Field	Description
<b>Additional Service Minutes</b>	Expected additional service minutes needed to complete services for this site.

## Edit Site: Billing Settings

The Billing Settings tab establishes the billing requirements for the site, including the receipt method for invoices and the designated billing contact.

The screenshot shows the 'EDIT SITE' interface with the 'Billing Settings' tab highlighted. The form contains the following fields and options:

- TAX EXEMPT?**: A checkbox.
- TAX EXEMPT REASON**: A text input field.
- SURCHARGE GROUP**: A dropdown menu with a clear icon.
- INVOICE BY EMAIL**: A dropdown menu with 'Account Settings' selected.
- SITE BILLING CONTACT1**: A dropdown menu.
- SITE BILLING CONTACT2**: A dropdown menu.
- PAYEE NAME**: A text input field.
- BILL GROUP**: A dropdown menu.
- BILL TO SELECTION**: A dropdown menu with 'Invoice mailed to site address' selected.

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

## Field Descriptions

Field	Description
<b>Tax Exempt</b>	If the site <u>is</u> tax exempt and no tax region was selected when the account was created, select the <b>Tax Exempt</b> check box.
<b>Tax Exempt Reason</b>	If the Tax Exempt box is checked, provide supporting information explaining the reason for the site's tax exemption.
<b>Surcharge Group</b>	Select a Surcharge Group if the location is subject to a surcharge.
<b>Invoice By Email</b>	<p>If the location is receiving invoices by email, select:</p> <ul style="list-style-type: none"> <li>• <b>Account Settings</b> and the location will follow what was previously set up for the account.</li> <li>• <b>Email With Link</b> and the location will receive a URL link to open the invoice.</li> <li>• <b>Email With PDF Attachment</b> and the invoice will be attached to the email as a PDF.</li> </ul>

Field	Description
Site Billing Contact 1 & 2	Choose the name of the Site Billing Contact if this contact differs from the account contact. Contacts can only be assigned here, and to create a new contact, you must use the Contacts tool.
Payee Name	The name of the person or company who will be receiving the payment.
Bill Group	The Bill Group the site is included in.
Bill To Selection	Identifies the address invoices will be billed to.

### Edit Site: BIC Profile

The BIC Profile tab pertains to commercial establishments in New York mandated by law to arrange for the collection of their putrescible waste and recyclables through a hauler licensed by the Business Integrity Commission (BIC).

The screenshot shows a web application window titled "EDIT SITE". It has four tabs: "Basic Settings", "Billing Settings", "BIC Profile" (which is highlighted with a red box), and "Required Capabilities". The "BIC Profile" tab contains the following fields:

- WASTE STREAM SURVEY**: A dropdown menu with "No" selected.
- BUSINESS TYPE**: A dropdown menu with "Not Selected" selected.
- CONTRACT TYPE**: A dropdown menu.
- OTHER FINANCIAL REQUIREMENTS**: A dropdown menu.
- COMMENTS**: A text area.

A green "SAVE" button is located at the bottom right of the form.

### Field Descriptions

Field	Description
Waste Stream Survey	Indicates if a waste stream survey was completed for the site.
Business Type	Specifies the business categorization used to identify the type of waste generated by the establishment.



<b>Contract Type</b>	Indicates if the contract between the customer and hauler was written or oral.
<b>Other Financial Requirements</b>	Indicates if the site has other financial requirements.
<b>Comments</b>	Option to provide addition comments regarding the site's BIC profile.

### Edit Site: Required Capabilities

The Required Capabilities tab allows for a Site capability to be added and removed. The capabilities listed are custom preset within *Setup > System > Capabilities*.

EDIT SITE

Basic Settings

Billing Settings

BIC Profile

Required Capabilities

CAPABILITY NAME

Can pick up Hooklift containers

Can pick up Roll containers with cable

SAVE