

Edit Account and Site Information

Last Modified on 02/23/2024 11:12 am EST

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.

The screenshot displays the Navusoft Customer Service interface. At the top, two accounts are listed: '41898 Navusoft Premier Waste And Recycling' (Active) and '41898002 Navusoft - Demo Site 2' (Inactive). Both accounts share the address '8100 Washington Ave, Houston, TX 77007-1062'. The active account has a 'Billed Thru Date Dec 19, 2023', while the inactive site has a 'Billed Thru Date None' and a 'Next Invoice Date Feb 16, 2023 BATCH-25667 (in progress)'. Below the account details is a summary table with columns for 'CURRENT', '1-30', '31-60', '61-90', '91-120', '120+', and 'TOTAL'. The values are: CURRENT: -51.00, 1-30: 135.92, 31-60: 0.00, 61-90: 649.95, 91-120: 0.00, 120+: 222.00, TOTAL: 956.87. A 'HIGHLIGHTS' section indicates 'Account is significantly past due'. Below this is a table for 'TOTAL RECURRING' services with columns for QTY, SERVICE CODE, SERVICE ID, FREQUENCY, SCHEDULE, RATE, START DATE, END DATE, CONTRACT EXP, and WO MIN. At the bottom, a 'CALENDAR' view shows the month of January 2024, with 'New Years Day' highlighted on Jan 1.

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.

41898 Navusoft Premier Waste And Recycling 41898002 Navusoft - Demo Site 2

8100 Washington Ave Houston, TX 77007-1062

Active

2 of 2

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

ACCESS NOTE delete

Arrears - Monthly Billed Thru Date Dec 19, 2023
Next Invoice Date

INVOICE BY EMAIL No
TERMS Net 20
SOURCE Cold Call
REBATE PAYMENT TYPENot Applicable

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 STATUS Active

NAME 2 DIVISION DAYTON

ADDRESS LINE 1 8100 Washington Ave SOURCE Cold Call

ADDRESS LINE 2 ACCOUNT MANAGER House Acct non System

CITY/STATE/POSTAL CODE Houston TX 77007-1 ACCOUNT CLASS COMMERCIAL

PHONE (207) 555-5555 AUDITOR

ATTN WEBSITE

BILLING PHONE (999) 999-9999 LOGO Select logo... BROWSE...

FAX (999) 999-9999 OLD ID

BILLING CONTACT 1

BILLING CONTACT 2 John Doe (Contact@fakeEmail.com)

PARENT ACCOUNT

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.
Fax	Number field to enter a number for a fax machine.

Field	Description
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.
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.
Auditor	Option to select the auditor over the account.
Website	Option to link the account's website to the account's information.
Logo	Option to upload the account's logo.
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
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Account
Settings

Billing

BILL GROUP	DAY-BAD DEBT \ INACTIVE	BILL BY SITE <input checked="" type="checkbox"/>	AUTO STATUS UPDATE <input type="checkbox"/>
	Arrears - Monthly Billed Thru Date Dec 19, 2023 Next Invoice Date		APPLY FINANCE CHARGES <input type="checkbox"/>
INVOICE BY EMAIL	No	EXCLUDE FROM PAYMENT PROCESSING FEE	<input type="checkbox"/>
TERM	Net 20	EXCLUDE FROM PAST DUE NOTIFICATION	<input checked="" type="checkbox"/>
CREDIT LIMIT		HIDE WORK ORDER FORMAT RATE	<input type="checkbox"/>
		INBOUND ORDER AUTO PRINT	<input checked="" type="checkbox"/>

AP

DEFAULT PAYMENT METHOD	Not Applicable	PAYEE NAME	1099 <input type="checkbox"/>
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.
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.

41898002 Navusoft - Demo Site 2

Active 2 of 2 **Inactive**

8100 Washington Ave
Houston, TX 77007-1062
Harris County Washington Avenue Coalitic
US

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

61-90	91-120	120+	TOTAL
649.95	0.00	222.00	956.87

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

PENDING

TOTAL RECURRING

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

EDIT SITE

Basic Settings | Billing Settings | BIC Profile | Required Capabilities

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

SAVE

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

Field Descriptions

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

Field Descriptions

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

Field	Description
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 interface titled "EDIT SITE" with a blue header. Below the header are four tabs: "Basic Settings", "Billing Settings", "BIC Profile" (which is highlighted with a red box), and "Required Capabilities". The main content area contains the following fields:

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

At the bottom of the form is a green "SAVE" button.

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.
Contract Type	Indicates if the contract between the customer and hauler was written or oral.
Other Financial Requirements	Indicates if the site has other financial requirements.
Comments	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