Division Setup

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Pathway: *Setup > System > Division*

This article outlines the setup of a Division, which serves as a distinct operating unit for organizing accounts. It plays a key role in streamlining operations, billing, and reporting processes.

DIVISION ID	NAME ↑	LEGAL ADDRESS	PHONE	TOLL FREE PHONE	EMAIL	DIVISION GROUP
1002	CORPUS	PO BOX 12345 Corpus Christi, TX	+1 555-555-5588	+1 800-555-6513	DAY_Div@navusoft.com	
1003	DAYTON	PO BOX 45678 Corpus Christi, TX	+1 555-555-9035		DAY_Div@navusoft.com	Texas
1006	HEARNE	900 1st Street LN HEARNE, TX	+1 555-555-0705	+1 555-555-2905	DAY_Div@navusoft.com	
1005	HILLSBORO	15 HILLSBORO, TX	+1 555-555-0705	+1 555-555-2905	DAY_Div@navusoft.com	
1004	HOUSTON	PO BOX 23456 Houston, TX	+1 555-555-9035		DAY_Div@navusoft.com	Texas
1008	NAVU	123 Main St Pasadena, CA	+1 555-555-5556		customerservice@navuso…	
1011	PGLTC	368 N Rodeo Dr Beverly Hills, CA	+1 888-555-1234		pgltc@navusoft.com	
1001	QAWASTE	200 Santa Monica Pier Legal - ADDR2 Santa M…	+1 555-555-2905	+1 800-555-1234	customerservice@navuso…	Texas

Permissions

The following permissions are required to add and edit within the Division Setup screen:

Permission ID	Permission Name
120	Setup / System Security

Details

Use the Details tab to enter division-specific information, such as contact and address details. Fields highlighted in red are mandatory for saving.

ADD DIVISION

| Details | Integrations | Addresses | Credit Card / ACH Processing | Intercompany |

Field	Value	Field	Value
NAME		AUTO PROCESS SERVICE CHANGES	
MAIN PHONE	(999) 999-9999	CUSTOMER PORTAL URL	
TOLL FREE PHONE	(999) 999-9999	CUSTOMER PORTAL PAST DUE TEXT	
FAX	(999) 999-9999	SMS TASK DEFAULT USER	
EMAIL		RO DISPOSAL REV %	0.00
TIME ZONE		ACCOUNT CUSTOM SETTINGS CLASS	
SERVICE NOTIFICATION FROM EMAIL		SITE CUSTOM SETTINGS CLASS	
DIVISION GROUP		EXCLUDE FROM NAVU SALES	No
EPA ID		ADJUSTMENT AMOUNT REQUIRING 2 APPROVALS	
GL SEGMENT		REFUND AMOUNT REQUIRING 2 APPROVALS	
DIVISION COST CENTER		CANCELLATION REQUEST AMOUNT REQUIRING 2 SAVE ATTEMPTS	
EXTERNAL DB ID		BAD DEBT RECOVERY GL ACCOUNT	
NOTE			
LOGO URL	Select Image... BROWSE...		

SAVE

Field Descriptions

Field	Description
Name *Required*	Field to enter the name of the Division. The name entered here is what displays for selection in Division fields throughout the application and on reports.
Main Phone *Required*	The main phone number for the division.
Toll Free Phone	Toll free phone line for the division.
Fax	Fax Number for the division.
Email	Main email for the Division.
Time Zone *Required*	The time zone the Division is located in.
Service Notification Email	The 'Sent By' email address that is populated when a service notification email is sent.
Division Group	Division based on internal grouping, primarily used for reporting purposes.
EPA ID	Field to enter the EPA ID for divisions that handle Regulated Medical Waste or Hazardous Material Removal.
GL Segment	If utilizing GL segmentation, enter the division segment number here.

Field	Description
External DB ID	External ID field for database imports.
Note	
Logo URL	Option to upload a Logo URL for the division.
Auto Process Service Changes *Required*	Controls whether service changes require approval in *Accounts > Order Processing*. If a change is submitted for an existing service and auto processing is disabled, the service will appear with a blue banner on the site. • If 'None' is selected, no approval process is required and the service will be updated upon save. • If 'All' is selected, approval is required for all service changes, regardless of the status of the service. • If 'Active Services' is selected, approval applies to only active services.
Customer Portal URL	The Customer Portal URL for the division.
Customer Portal Past Due Text	Text that displays upon login when an account is past due.
Account Custom Setting Class	
Site Custom Setting Class	
Exclude From Navu Sales	Excludes the division from displaying in the sales screens and pipelines.
Adjust Amount Requiring 2 Approvals	If an amount is entered here, a secondary approval will be required for invoice adjustments that exceed what was entered. A message noting the requirement will display at the time the user adjusts the invoice as well as on the *Invoice Adjustment - Pending Approval and History* screen. **Approver 1 Logic** This setting takes into consideration the user's Adjustment Approval Limit assigned to the user's role. If the value entered for the user role **is greater** than the adjusted amount to the invoice, they are considered approver 1. **Approver 2 Logic** Once the adjustment has received its first approval, the same approval logic will apply for the second approver.

Field	Description
Refund Amount Requiring 2 Approvals	If an amount is entered here, a secondary approval will be required for refunds that exceed this value. A message noting the requirement will display at the time the user submits the refund request. **Approver 1 Logic** This setting takes into consideration the user's Refund Approval Limit assigned to the user role. If the value entered for the user role **is greater** than the refund amount, they are considered "Approver 1." After the first approval, the status will remain "Submitted for Approval." **> Example**: Refund Request Amount = $500 **and** User Refund Approval Limit = $1000. User is authorized to approve refund request. **Approver 2 Logic** After the refund has received its first approval, the same approval logic will apply for the second approver. After the second approval is captured, the status will be updated to "Approved."

Integrations

The Integrations tab contains settings that manage how Navusoft connects with external platforms and services.

Field Descriptions

Field	Description
Enable Integration	Indicates whether the system should allow data exchange between Navusoft and an external platform or service. When enabled, integration-related features and workflows become active based on the connected system's configuration.
Lock Box Import Format	If using a LockBox account, select the format here.
Lock Box Non-Matching Default Account	Enter the account information for any non-LockBox payments that should be routed to a separate bank account for additional sorting.

Mailchimp API Key	A secure code that enables third-party systems to interact with your Mailchimp account via its API.
Mailchimp List ID	A unique identifier assigned to each audience (formerly called a list) in your Mailchimp account.
Camera External ID	Enter ThirdEye information to connect to account.
EDI Company ID	Specifies the name of the company or trading partner used for Electronic Data Interchange (EDI) communication.

Addresses

The Addresses tab is used to set up addresses for legal documents, return mail, billing, and invoice redirects.

Field Descriptions

Address Name	Address Description
Legal Address	The official address used for legal and formal communications regarding the division.
Return Mail Address	The address where undeliverable mail can be returned to.
Bill Remit Address	The Bill Remit Address is where payments for an invoice should be sent. This address may differ from the legal address, particularly if payments are processed at a separate location, such as a central office or third-party payment processor.

Redirect Invoice Address	An alternate address to which invoices are sent instead of the Bill Remit address.

Credit Card / ACH Processing

The Credit Card / ACH Processing tab activates credit card and ACH processing for a division. Fields highlighted in red are required to save.

Field Descriptions

Field	Description
Card Not Present	
Enable *Required*	Selections here affect the display of the **Add icon** in *Accounts > AR History > Wallet* and the Wallet feature in the Customer Portal. If 'No' is selected, the icon is not displayed. Options include: • Yes (Credit Card & ACH) • Yes (Credit Cards Only) • No
Processor *Required*	Indicates the credit card processing platform used for transactions.
Environment	Controls if this is a testing environment or live. • Production - Required to process customer transactions. • Sandbox - Testing option.
API Key / User Name *Required*	Field to enter the Gateway API Key provided by the credit card processor.

Trans. Key / Password *Required*	Field to enter the password provided by the credit card processor.
Credit Card Merchant ID	Field to enter identification number for credit card provided by the credit card processor.
Echeck/ACH Merchant ID	Field to enter identification number for bank account provided by the credit card processor.
Settlement Time *Required*	Indicates the settlement time for the payment batches. Any payments recorded after the time selected will be applied to the next day's payment batch.
Credit Card Bank Account	Select the bank account payments are to be sent to from the available options.
Payment Receipt Notification Template *Required*	Select the Payment Receipt Notification Template that will be emailed to the customer upon receipt of payment. *Notification Templates are created in Setup > System > Notification Template*
Declined Payment Notification Template *Required*	Select a Declined Payment Notification Template that should be emailed to the customer in the event a payment is declined. *Notification Templates are created in Setup > System > Notification Template*
Payment Refund Notification Template *Required*	Select a Payment Refund Notification Template that should be emailed to the customer in the event a payment is declined. *Notification Templates are created in Setup > System > Notification Template*
Chargeback Notification Template	Select a chargeback notification template that should be emailed to the customer in the event of the reversal of a transaction through the bank or credit card issuer. *Notification Templates are created in Setup > System > Notification Template*
Card Present	
Processor	Indicates the credit card processing platform used for transactions.
Wait for Terminal Timeout (Sec)	Refers to the number of seconds the system will wait for a response from the credit card terminal before considering the attempt timed out or failed.
Enable Non-Integrated Credit Card Terminal	Indicates a standalone credit card terminal is being used and there is no automatic communication between Navusoft and the terminal.
Enable Card-Not-Present on Scale	If disabled, requires scale operators to use credit card terminals for credit card transactions as a method to prevent manual entry.

Inter-Company

Inter-company billing involves invoicing transactions between different divisions. It's crucial for tracking internal costs and keeping financial records consistent across all business units.

Fields and Descriptions

Field	Description
Enable Disposal Billing	Determines how internal disposal is billed. • **No** - *select this option to disable disposal billing. This is the default setting.* • **Yes (Bill to site for each transaction)** - *Select this option to bill against an internal site that has been set up specifically for tracking internal disposal billing.* • **Yes (Automated GL Batch)**
Bill To Site	Identifies the specific site disposal transactions will be billed against. Requires prior setup of a site.
Disposal Charge Code	Specifies the charge code to be used for internal billing. A charge code for inter-company disposal must be set up beforehand.