Division Setup
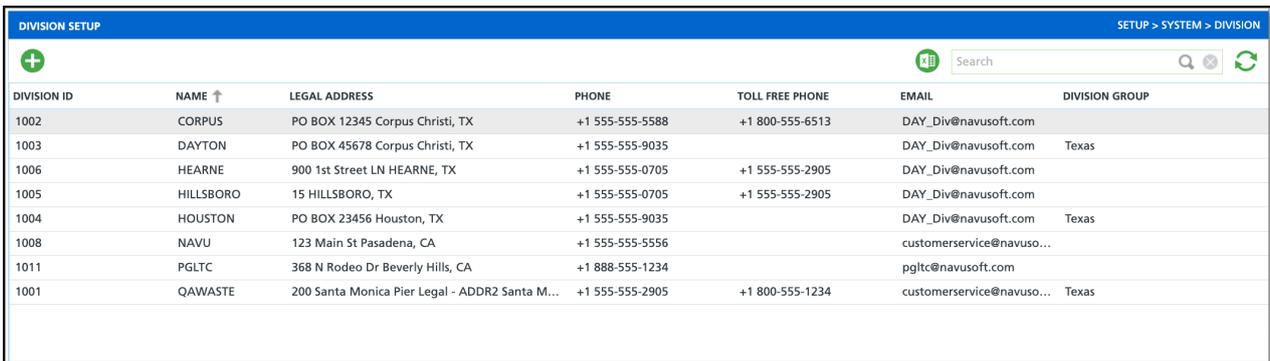
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Pathway: *Setup > System > Division*

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. Divisions are used to separate business units, geographical regions, or different companies operating under the same system.

Field Descriptions

Field	Description
Division ID	System generated unique ID.
Name	The name of the Division.
Legal Address	The main phone number for the division.
Phone	Phone number for the division.
Toll Free Phone	Toll free phone line for the division.
Email	The primary email for the Division. The *Send Bulk Customer Portal Invites* tool uses this for the Email From field.
Division Group	An internal grouping, primarily used for reporting purposes.

Add/Edit a Division

To create a new division or modify an existing one, follow the steps below.

To Add

1. Click the **green +** icon to open the *Add Division* screen. There are several tabs that contain settings and values that define the Division and how it is handled financially and operationally.
2. Required fields are highlighted in red or have a default value already set.
3. **Carefully** enter the information. Reference the Tab sections of this article for detailed information about each field.
4. Select **Save** when finished.

To Edit

> ⊘ **Attention:** Once setup configurations are established, changes to required fields can negatively impact accounts, particularly in service and billing. Make changes with caution and system awareness.

1. Double click on the Division row to open the *Update Division* editor.
2. Carefully adjust values.
3. Select **Save.**

Note: In lieu of updating an existing division, sometimes it is best practice to create a new division instead, depending on what needs to be changed.

Details Tab

Use the Details tab to enter/view 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

NAME		AUTO PROCESS SERVICE CHANGES	
MAIN PHONE	(201) 555-0123	CUSTOMER PORTAL URL	
TOLL FREE PHONE	(201) 555-0123	CUSTOMER PORTAL PAST DUE TEXT	
FAX	(201) 555-0123	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	
EXTERNAL DB ID		CANCELLATION REQUEST AMOUNT REQUIRING 2 SAVE ATTEMPTS	
NOTE		BAD DEBT RECOVERY GL ACCOUNT	
LOGO URL	Select Image... **BROWSE...**		

SAVE

Field Descriptions

Field	Description
Name *Required*	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	The Toll free phone line for the division.
Fax	The Fax Number for the division.
Email	The main email for the Division. The *Send Bulk Customer Portal Invites* tool uses this in the Email From field.
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.

Field	Description
Division Group	Division based on internal grouping, primarily used for reporting purposes.
EPA ID	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.
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	The 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 Tab

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

Field Descriptions

Field	Description
Enable Integration *Required*	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	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	TheThirdEye information to connect to account.
EDI Company ID	The name of the company or trading partner used for Electronic Data Interchange (EDI) communication.

Addresses Tab

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 *Required*	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 Tab

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. *Note: If a processor is selected, additional processor specific fields will display.*
Environment *Required (if Processor is selected)*	Controls if this is a testing environment or live. • Production - Required to process customer transactions. • Sandbox - Testing option.
API Key / User Name *Required*	The Gateway API Key provided by the credit card processor.
Trans. Key / Password *Required*	The password provided by the credit card processor.
Credit Card Merchant ID	The identification number for credit card provided by the credit card processor.
Echeck/ACH Merchant ID	The identification number for the bank account provided by the credit card processor.
Settlement Time *Required*	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	The bank account that payments are to be sent to from the available options.
Payment Receipt Notification Template *Required*	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*	The 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*	The 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	The 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	The credit card processing platform used for transactions. *Note: If a processor is selected, additional processor specific fields will display.*
Wait for Terminal Timeout (Sec)	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 Tab

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

Intercompany Disposal	
Field	**Description**

	Determines how internal disposal is billed.
Enable Disposal Billing	• **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	The specific site disposal transactions will be billed against. Requires prior setup of a site.
Disposal Charge Code	The charge code to be used for internal billing. A charge code for inter-company disposal must be set up beforehand.
National Accounts	
Accounts Payable GL Account	The general ledger account used to track amounts owed to vendors within the division.
Accounts Receivable GL Account	The general ledger account used to track amounts owed by customers within the division.
Cost of Goods GL Account	The general ledger account used to track the direct costs associated with servicing accounts within the division.

Permissions

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

Permission ID	Permission Name
120	Setup / System Security

Database Query Mapping

Use the Database Query Tool to filter, group, and analyze operational and financial data by Division, providing localized reporting and performance audits across both Account and Site divisions.
Database > Database Query

Here are some example mappings:

To Find	Use this Entity	Use this Display Field
All accounts and/or sites for a given division.	*Accounts and Sites*	**Account Division Name** and/or **Site Division Name**
All work orders for a given division.	*Work Order* or *Active Services*	**Division Id** (work order) or **Division Name** (active services)
Revenue billed for a given division.	*Revenue* or *Aging Results*	**Division Id** or **Division Name**

Related Articles

Add a New Account (Active)