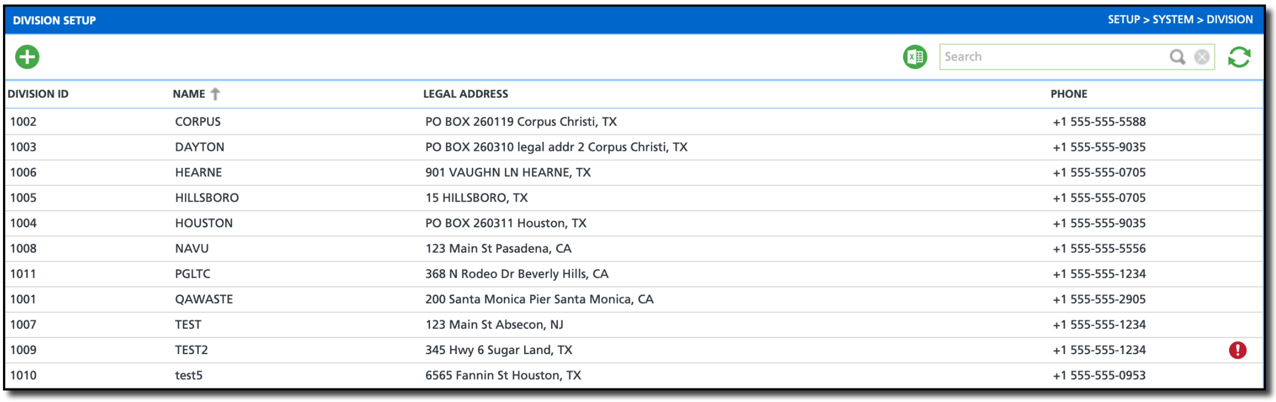
Division Setup

Last Modified on 12/02/2024 2:07 pm PST

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
1002	CORPUS	PO BOX 260119 Corpus Christi, TX	+1 555-555-5588
1003	DAYTON	PO BOX 260310 legal addr 2 Corpus Christi, TX	+1 555-555-9035
1006	HEARNE	901 VAUGHN LN HEARNE, TX	+1 555-555-0705
1005	HILLSBORO	15 HILLSBORO, TX	+1 555-555-0705
1004	HOUSTON	PO BOX 260311 Houston, TX	+1 555-555-9035
1008	NAVU	123 Main St Pasadena, CA	+1 555-555-5556
1011	PGLTC	368 N Rodeo Dr Beverly Hills, CA	+1 555-555-1234
1001	QAWASTE	200 Santa Monica Pier Santa Monica, CA	+1 555-555-2905
1007	TEST	123 Main St Absecon, NJ	+1 555-555-1234
1009	TEST2	345 Hwy 6 Sugar Land, TX	+1 555-555-1234
1010	test5	6565 Fannin St Houston, TX	+1 555-555-0953

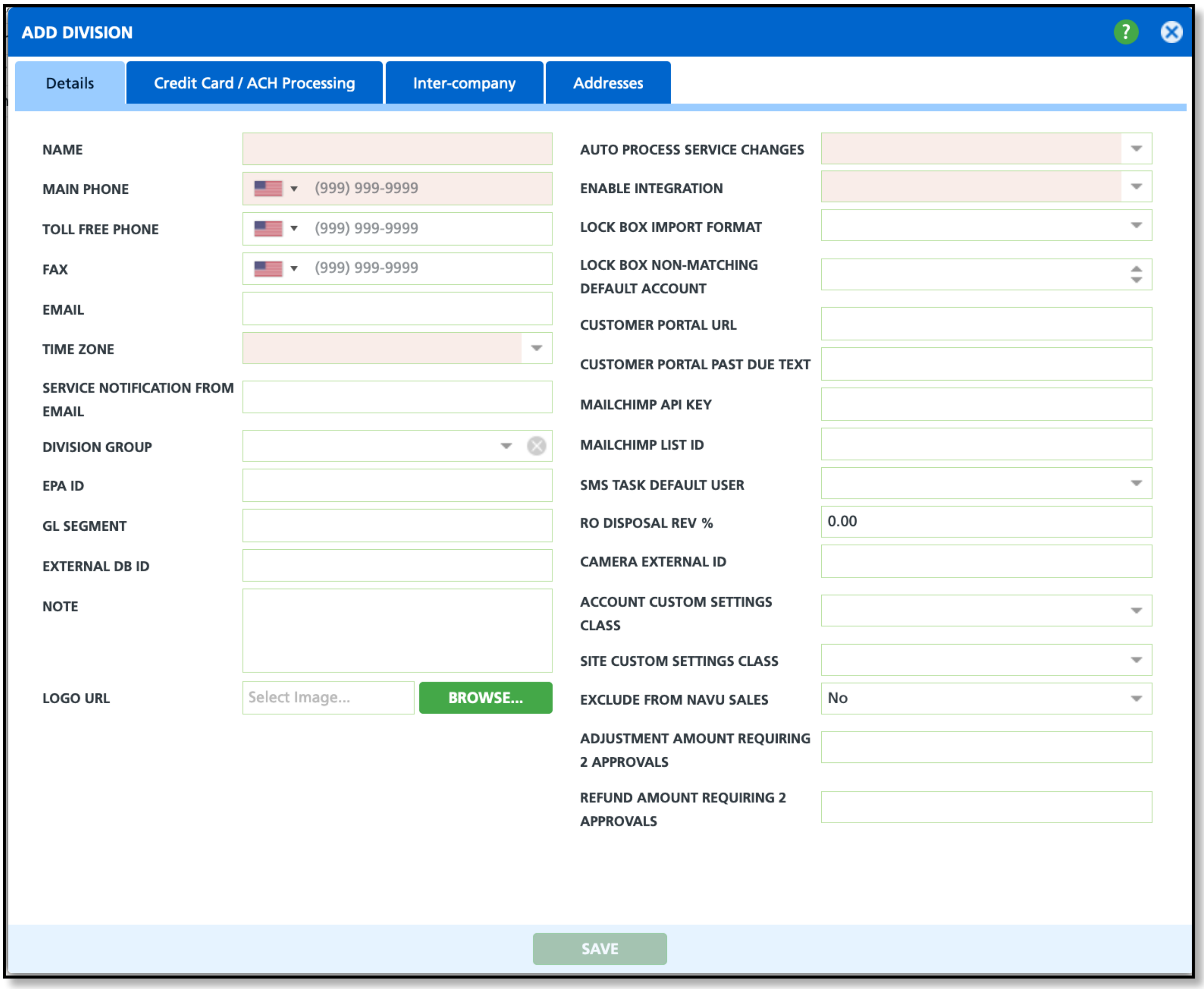
Permissions

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.



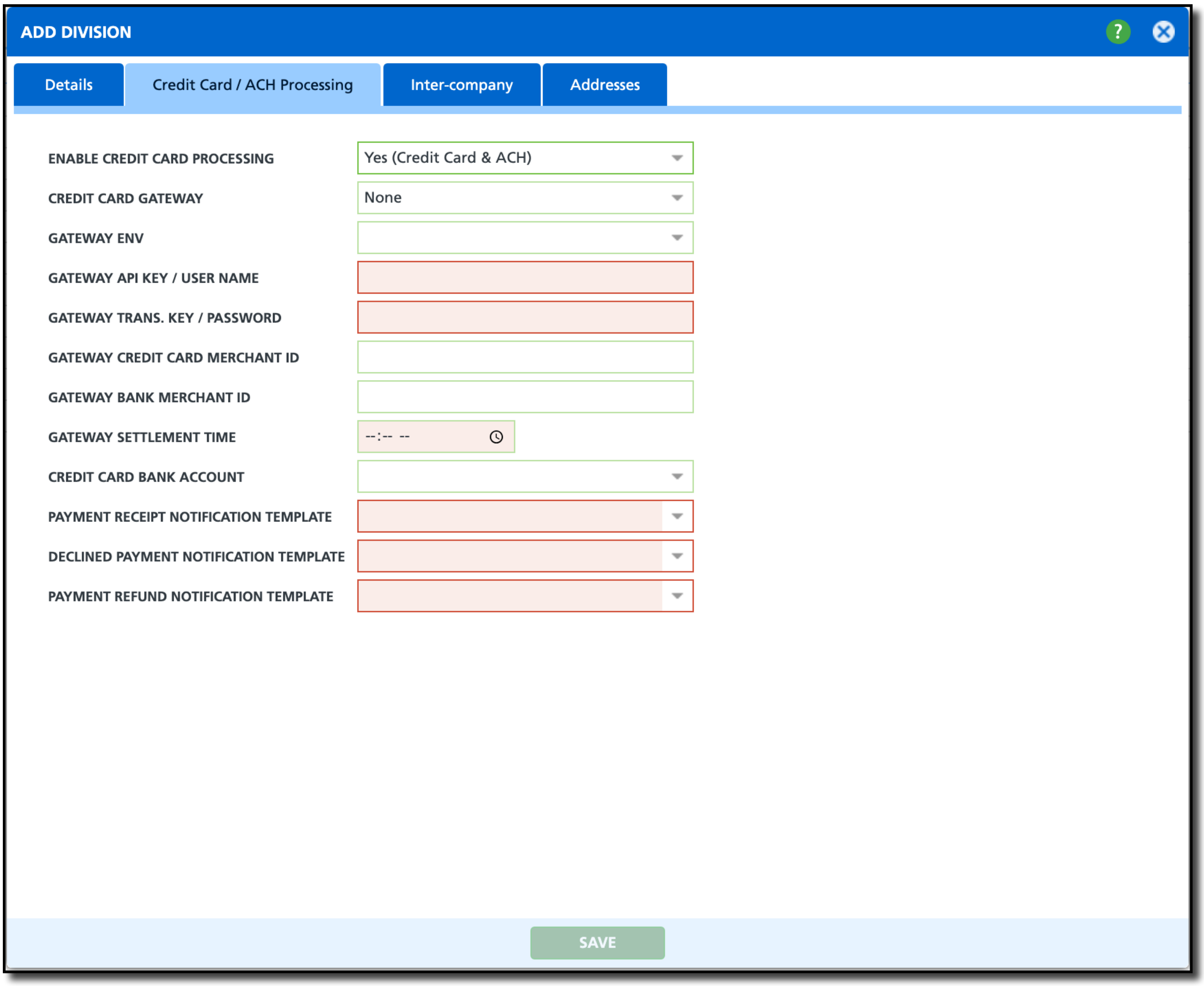
Field	Description
Name *Required*	Field to enter the name of the Division. The name entered here is what displays for selection in Division fields throughout the application and on reports.
Main Phone *Required*	The main phone number for the division.
Toll Free Phone	Toll free phone line for the division.
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.

Field	Description
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.
Enable Integration *Required*	Select None.
LockBox Import Format	If using a LockBox account, select the format here.
LockBox Non-Matching Account	Enter the account information for any non LockBox payments to be sent to another a separate bank account for further sorting.
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.
MailChimp API Key	
MailChimp List ID	
SMS Text Default User	
RO Disposal Rev %	
Camera External ID	Enter ThirdEye information to connect to account.
Account Custom Setting Class	
Site Custom Setting Class	
Exclude From Navu Sales	Excludes the division from displaying in the sales screens and pipelines.

Field	Description
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.
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."

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.

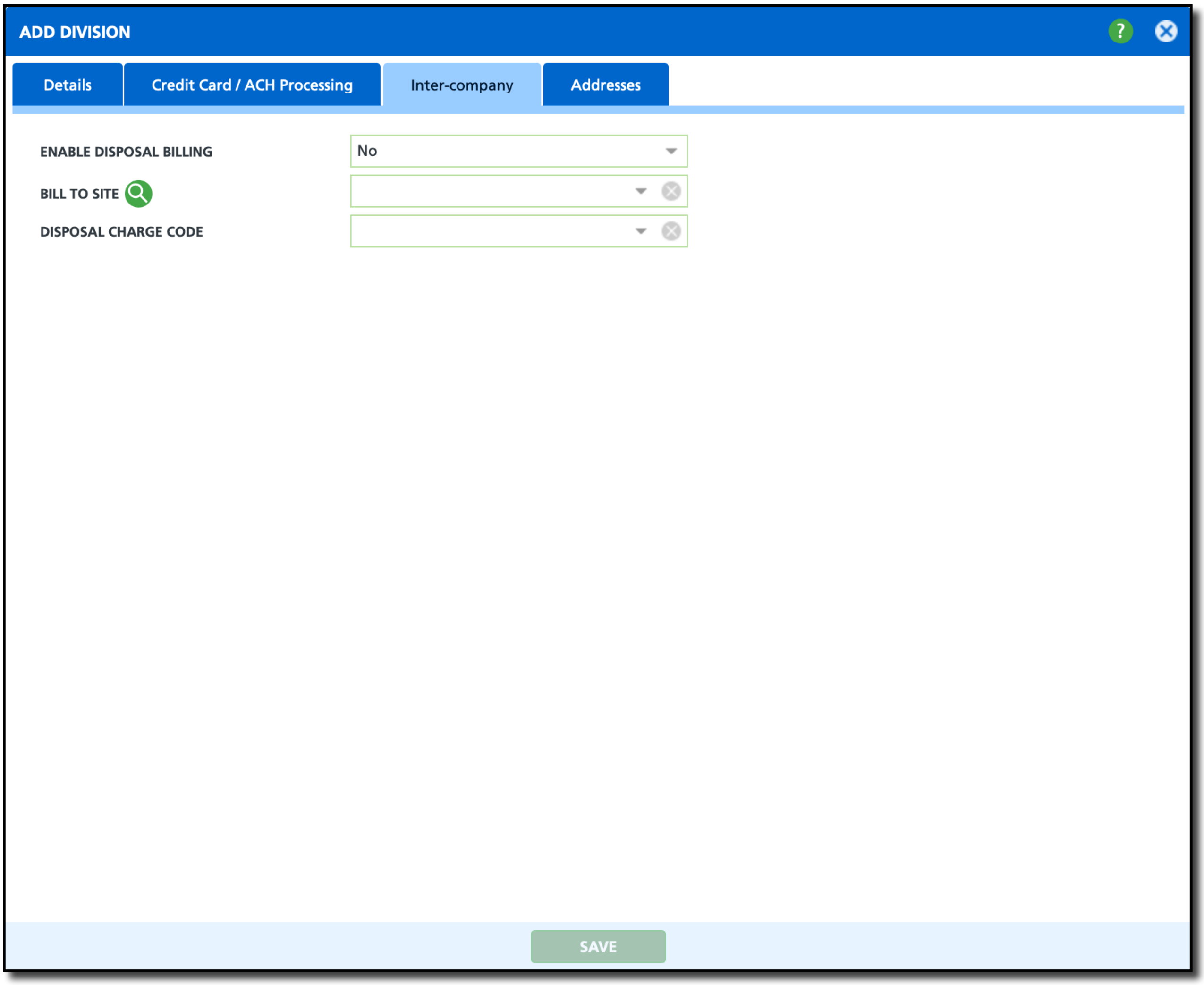


Field	Description
Enable Credit Card Processing *Required*	Selections here affect the display of the **Add icon** in *Accounts > AR History > Wallet* and the Wallet feature in the Customer Portal. If 'No' is selected, the icon is not displayed. Options include: • Yes (Credit Card & ACH) • Yes (Credit Cards Only) • No
Credit Card Gateway *Required*	Select Pineapple.
Gateway Env	Controls if this is a testing environment or live. • Production - Required to process customer transactions. • Sandbox - Testing option.
Gateway API Key / User Name *Required*	Field to enter the Gateway API Key provided by Pineapple.
Gateway Trans. Key / Password *Required*	Field to enter the password provided by Pineapple.
Gateway Credit Card Merchant ID	Field to enter identification number for credit card provided by Pineapple.

Gateway Bank Merchant ID	Field to enter identification number for bank account provided by Pineapple.
Gateway 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*

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.

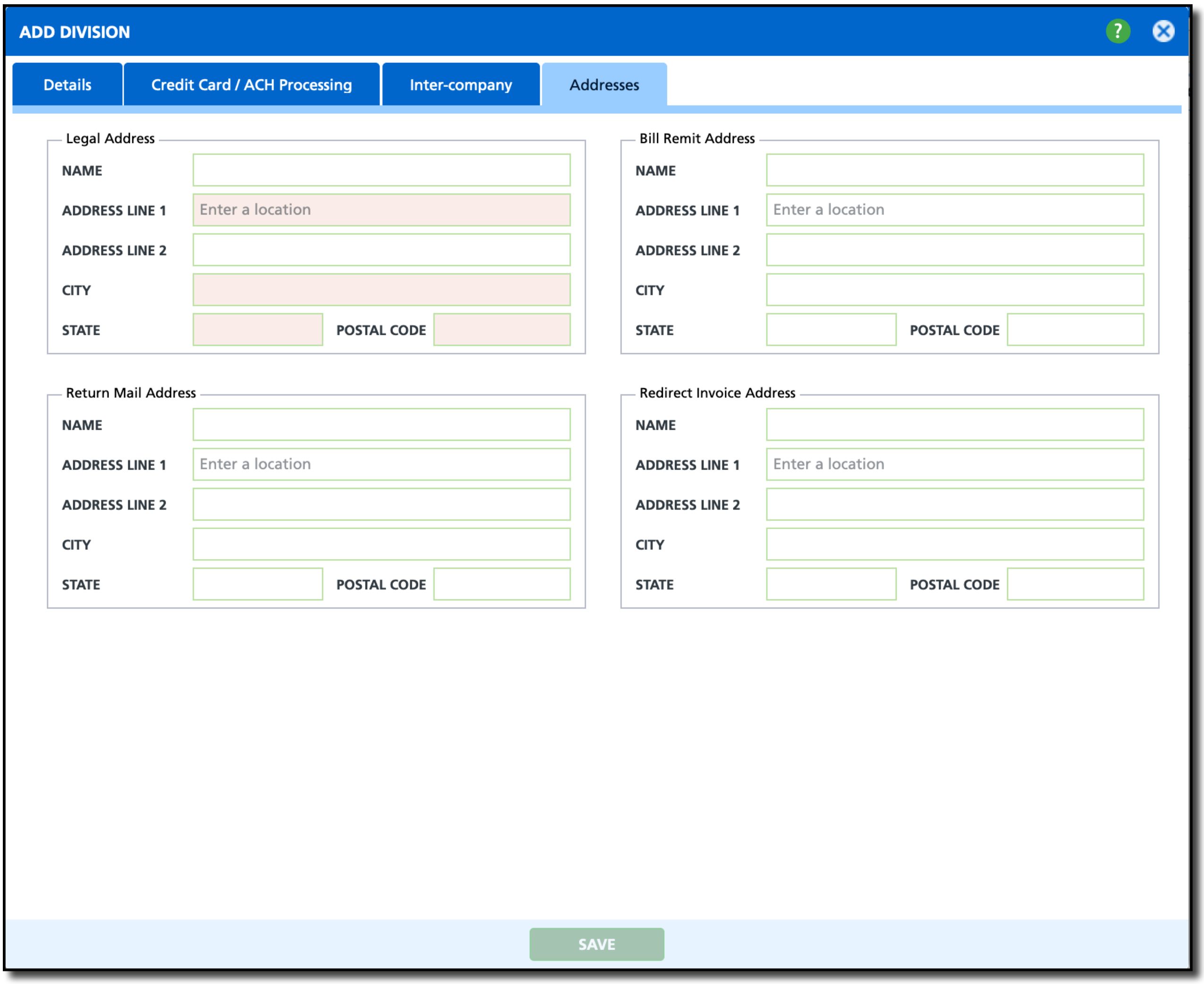


Fields and Descriptions

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.

Addresses

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



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.