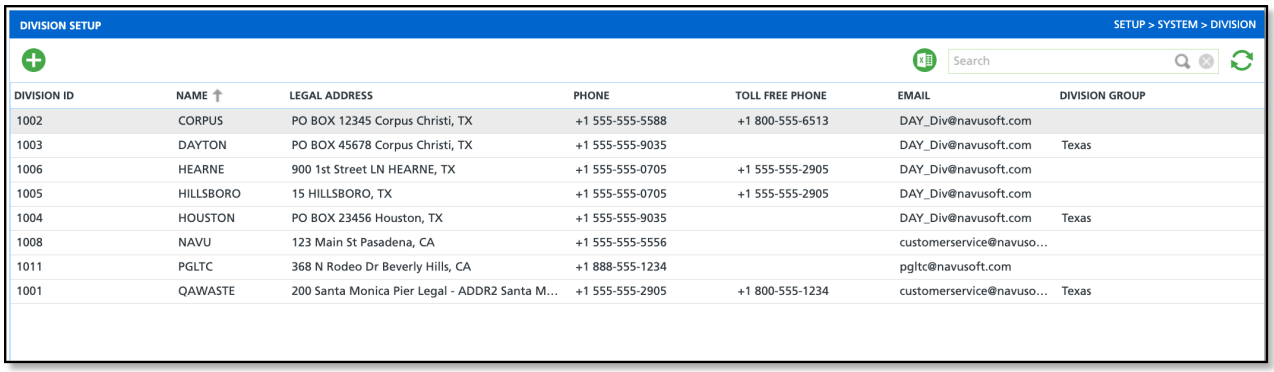
# Division Setup

Last Modified on 10/22/2026 12:58 pm PDT

**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.




| 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 |

Expand All Sections | Collapse All Sections

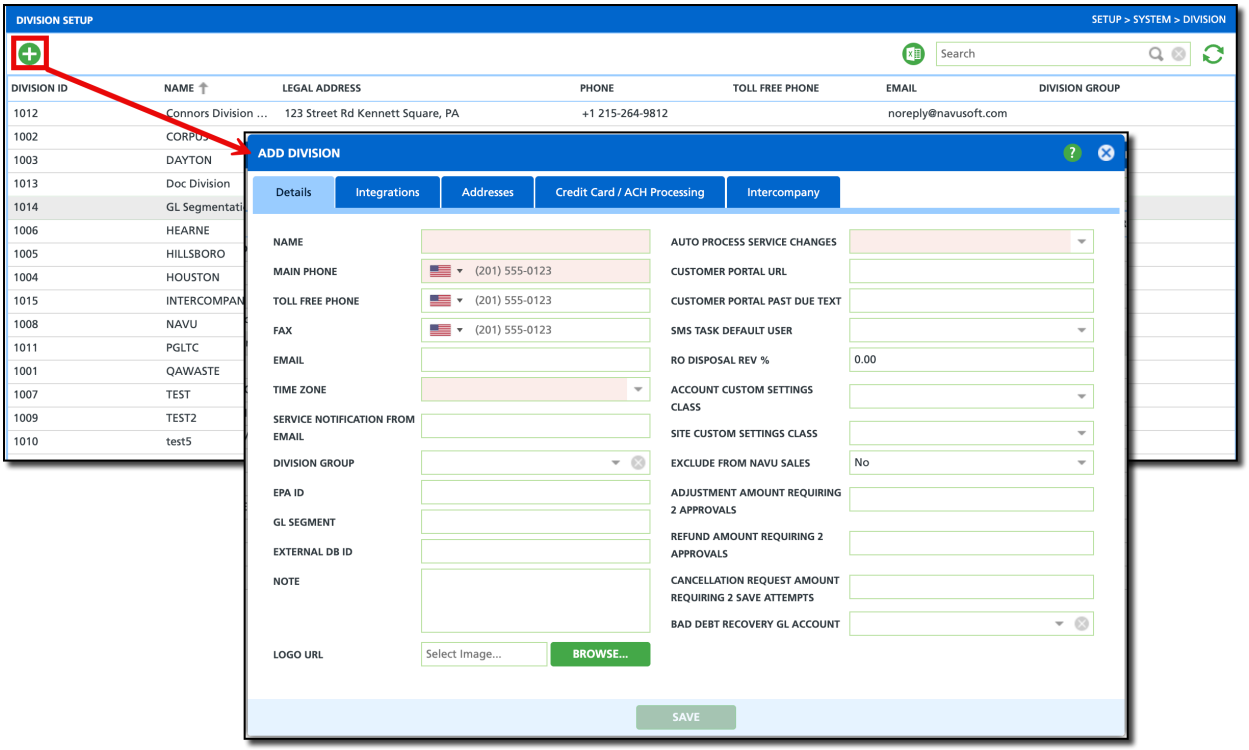
Helpful Tip: To search all text using **CTRL**-F, you must first click on the Expand All Sections button.

## 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.<br><br>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.

The **Cost / Target Pricing** tab is added after being created and is provided in the Edit screen.

### To Edit

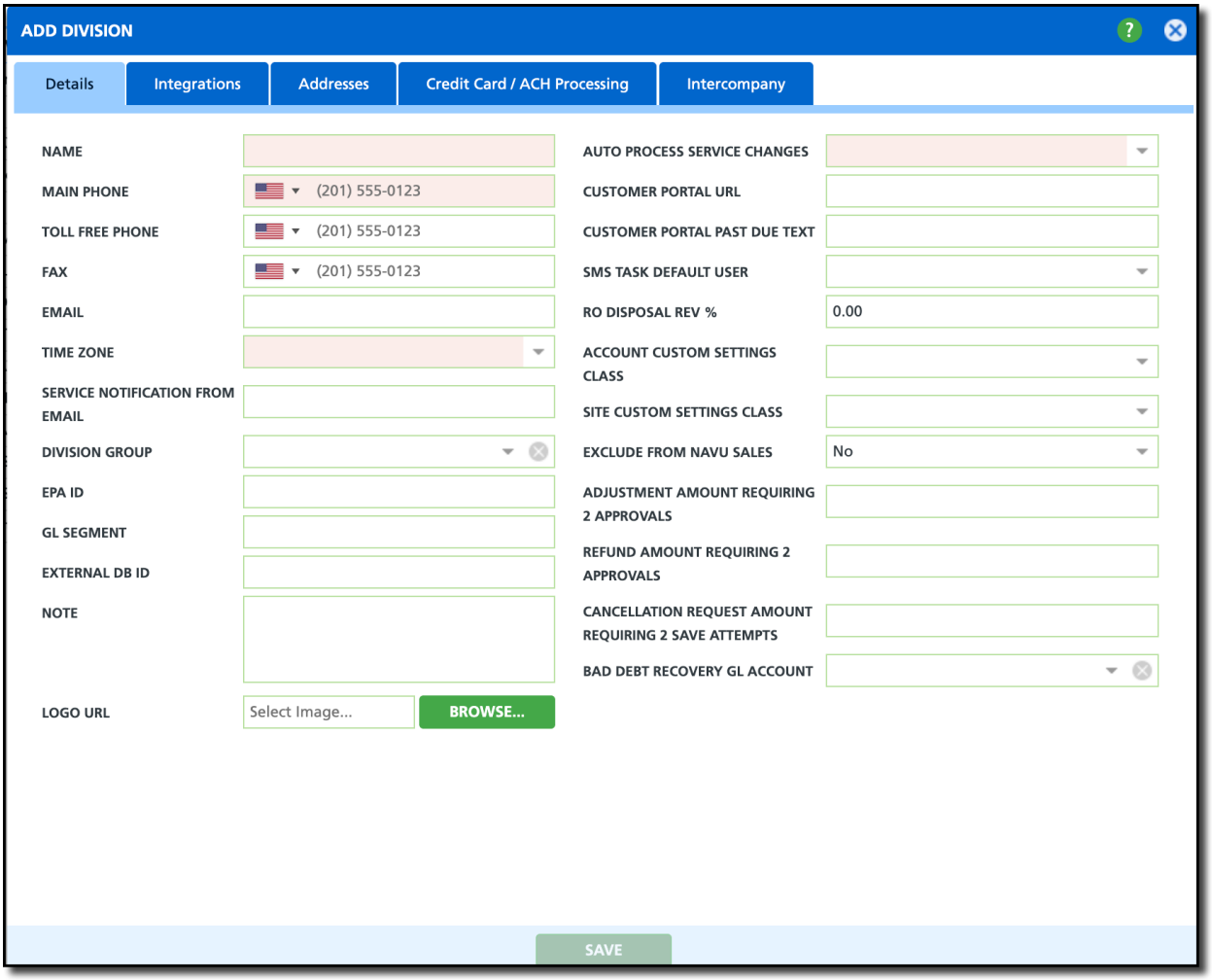
**Attention:** Once setup configurations are established, changes to required fields can negatively impact accounts, particularly in service and billing. Make changes with caution and system awareness.

1. Double click on the Division row to open the *Update Division* editor.
2. Carefully adjust values.
3. The **Cost / Target Pricing** tab is now displayed. Completed if needed.
4. Select **Save.**

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.




## Field Descriptions

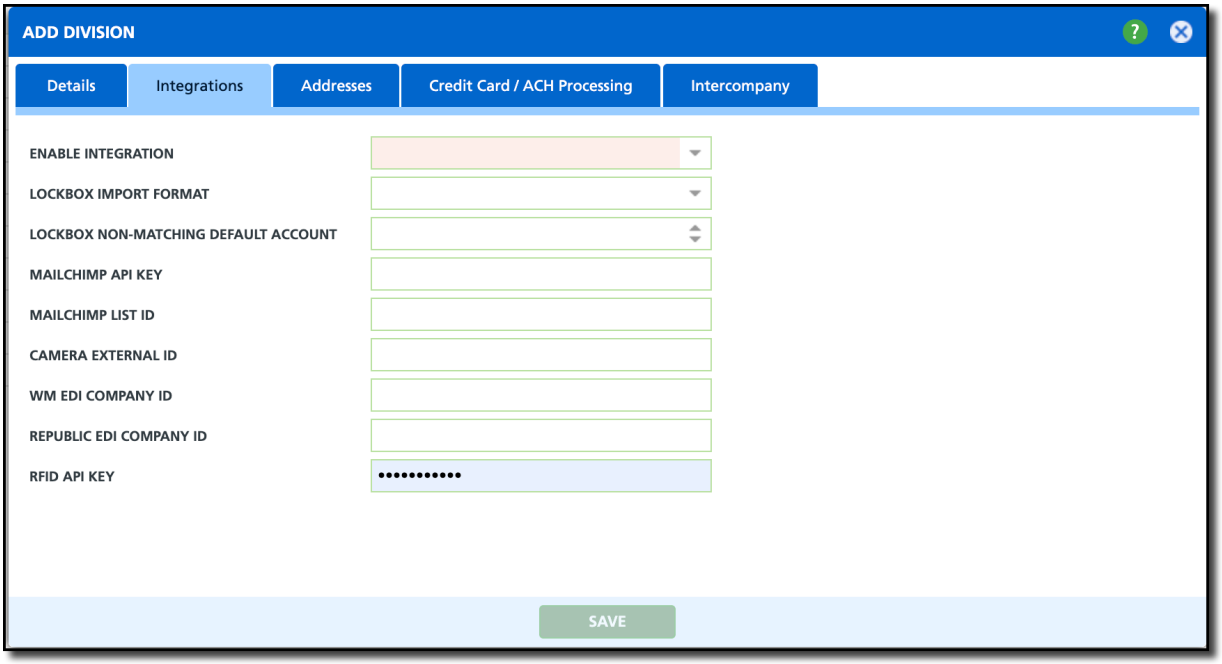
| Field | Description |
|---|---|
| **Name** *Required* | The name of the Division. The name entered here is what displays for selection in Division fields throughout the application and on reports. |
| **Main Phone** *Required* | The main phone number for the division. |
| **Toll Free Phone** | The toll free phone line for the division. |
| **Fax** | The fax number for the division. |
| **Email** | The main email for the Division.<br><br>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. |
| **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. |

| Field | Description |
| --- | --- |
| **GL Segment** | If utilizing GL segmentation, enter the division segment number here. |
| **External DB ID** | External ID field for database imports. |
| **Note** | Internal note that can be used to document general information about the division like when the division was created, who created it, any particulars specific to the area. |
| **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.<br>• **None** - No service changes are automatically processed. All submitted service changes require approval through **Order Processing**.<br>• **All** - All service changes are auto processed.<br>• **Active Services** - Only changes to active services are automatically processed. |
| **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. |
| SMS Task Default User | Pending Definition |
| RO Disposal Rev % | Pending Definition |
| Account Custom Setting Class | Pending Definition |
| Site Custom Setting Class | Pending Definition |
| **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.<br><br>**Approver 1 Logic**<br>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.<br><br>**Approver 2 Logic**<br>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.<br><br>**Approver 1 Logic**<br>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."<br>> **Example**: Refund Request Amount = $500 **and** User Refund Approval Limit = $1000. User is authorized to approve refund request.<br><br>**Approver 2 Logic**<br>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." |
| Cancellation Request Amount Requiring 2 Save Attempts | Pending Definition |
| Bad Debt Recovery GL Account | Pending Definition |

## Integrations Tab

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



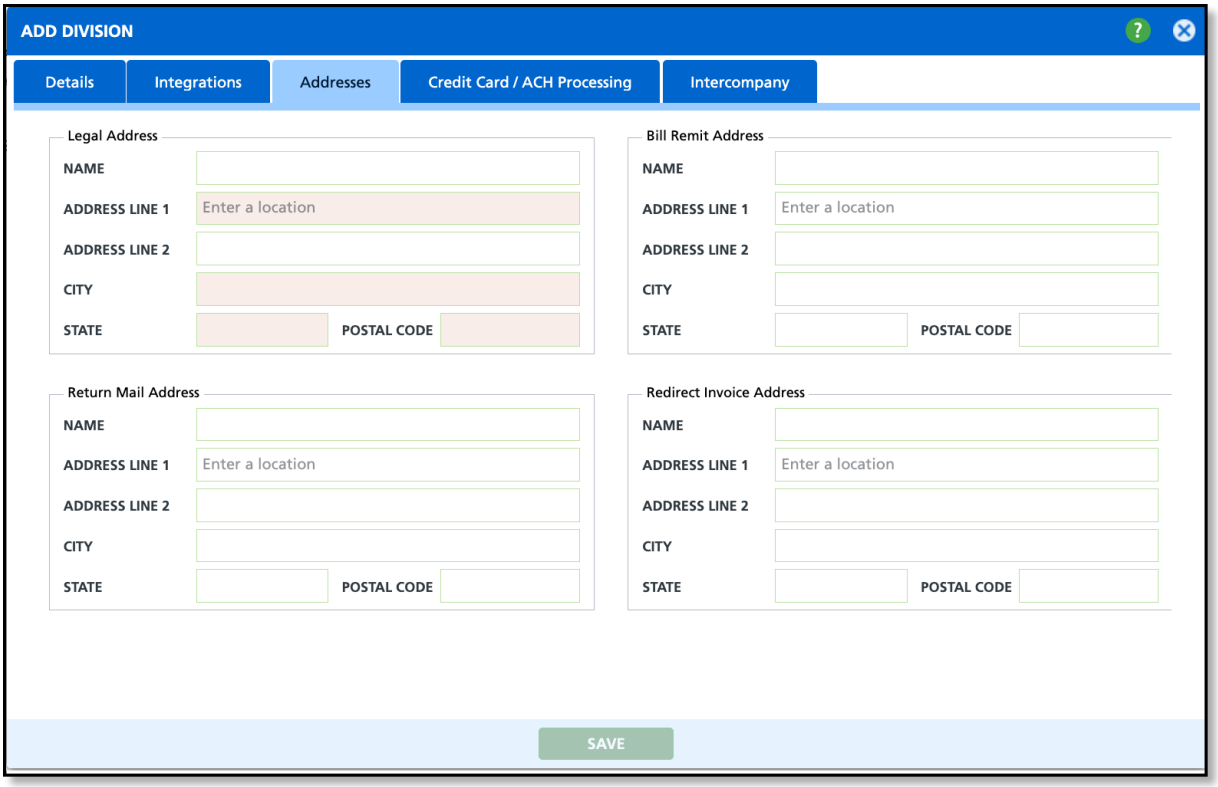

### Field Descriptions

| Field | Description |
|---|---|

| | |
|---|---|
| **Enable Integration**<br>*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. |
| **Lockbox Import Format** | If using a Lockbox account, select the format here. There are two Navusoft options:<br>• **Format3**<br>  ◦ Payments are matched against the Account ID or the External ID.<br>• **Format 3 - Account ID & Invoice ID Match Only**<br>  ◦ Payments are matched exactly against the internal Account ID. External and legacy IDs are not used. If an account ID is missing or not found, a valid Invoice ID can provide the account ID.<br><br>Additional Lockbox Information: Lockbox Payment Import Formats |
| **Lockbox Non-Matching Default Account** | The account information for any non-Lockbox payments that should be routed to a separate bank account for additional sorting. This account is also used if neither an account nor an invoice is found. An explanatory note is added to the results file. |
| **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** | The external camera (i.e., ThirdEye) information needed to connect to account. |
| **WM EDI Company ID** | The ID of the company or trading partner used for Electronic Data Interchange (EDI) communication used by WM. |
| **Republic EDI Company ID** | The ID of the company or trading partner used for Electronic Data Interchange (EDI) communication used by Republic Services. |
| **RFID API Key** | A unique, secure password (or digital token) assigned to each division allowing secure connection to the RFID vendor. |

## Addresses Tab

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



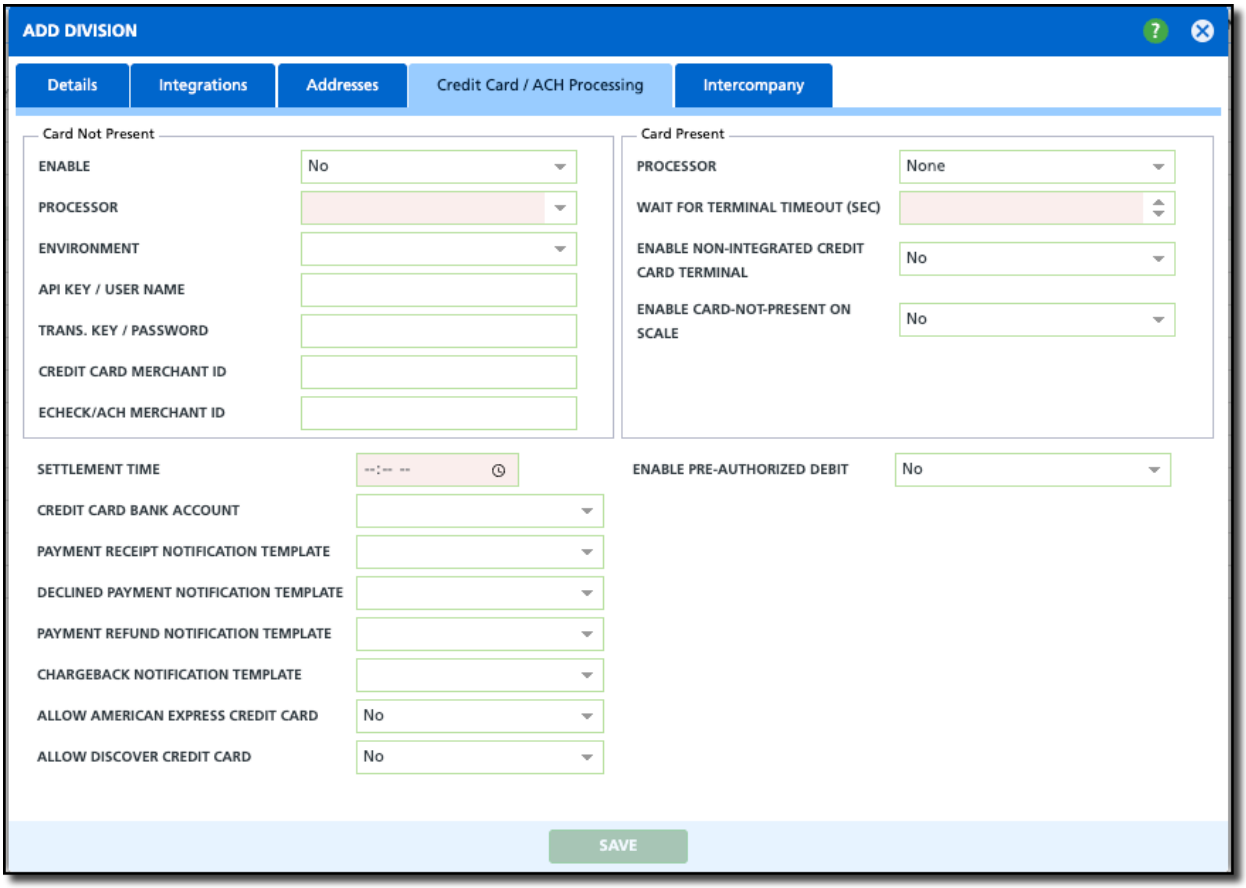

### Field Descriptions

| 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 undelivered 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.

For additional information specifically related to Card Present, refer to the Card Present - Credit Card Terminal Setup documentation.




## Field Descriptions

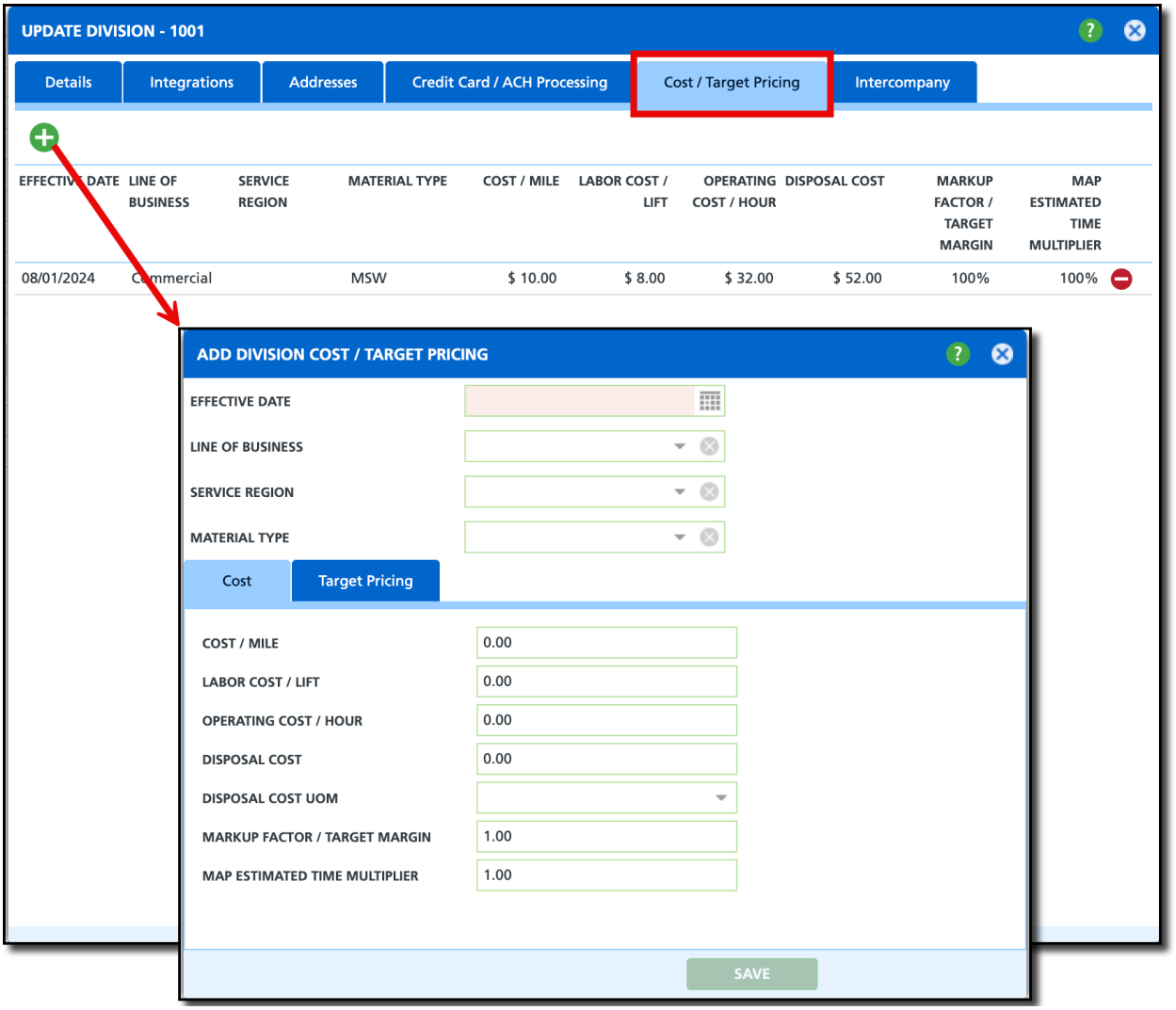
| Field | Description |
|---|---|
| **Card Not Present** | |
| **Enable**<br>*Required* | Selections here affect the display of the **Add icon** in *Accounts > AR History > Wallet* and the Wallet feature in the Customer Portal. If 'No' is selected, the icon is not displayed. Options include:<br>• Yes (Credit Card & ACH)<br>• Yes (Credit Cards Only)<br>• No |
| **Processor**<br>*Required* | Indicates the credit card processing platform used for transactions.<br><br>*Note: If a processor is selected, additional processor specific fields will display.* |
| **Environment**<br>*Required (if Processor is selected)* | Controls if this is a testing environment or live.<br>• Production - Required to process customer transactions.<br>• Sandbox - Testing option. |
| **API Key / User Name**<br>*Required* | The Gateway API Key provided by the credit card processor. |
| **Trans. Key / Password**<br>*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**<br>*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**<br>*Required* | The Payment Receipt Notification Template that will be emailed to the customer upon receipt of payment.<br><br>*Notification Templates are created in Setup > System > Notification Template* |
| **Declined Payment Notification Template**<br>*Required* | The Declined Payment Notification Template that should be emailed to the customer in the event a payment is declined.<br><br>*Notification Templates are created in Setup > System > Notification Template* |
| **Payment Refund Notification Template**<br>*Required* | The Payment Refund Notification Template that should be emailed to the customer in the event a payment is declined.<br><br>*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.<br><br>*Notification Templates are created in Setup > System > Notification Template* |
| **Allow American Express Credit Card** | Dictates if the American Express logo is displayed on the credit card processing screens. Set to **Yes** to display the logo. |
| **Allow Discover Credit Card** | Dictates if the Discover logo is displayed on the credit card processing screens. Set to **Yes** to display the logo. |
| **Enable Pre-Authorized Debit** | When enabled, allows the terminal to accept Pre-Authorized Debit (PAD) card transactions.<br><br>Review the Pre-Authorizated Debit (PAD) Setup and Processing before enabling this feature. |
| **Pre-Authorized Debit Export Report**<br>*Conditional* | The export report format that will be used for accounts that have the Pre-Authorized Debit enabled.<br>*Displays when Enable Pre-Authorized Debit is set to Yes.* |
| **Card Present** | |
| **Processor** | The credit card processing platform used for transactions.<br><br>*Note: If a processor is selected, additional processor specific fields will display.* |
| **Merchant ID**<br>*Conditional* | A unique identifier provided by CardPointe that links transactions from this terminal to your merchant account. Enter the Merchant ID exactly as issued to ensure successful processing and settlement of payments.<br>*Displays with selection of Processor.* |

| | |
|---|---|
| **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 PIN-Based Debit** *Conditional* | When enabled, allows the terminal to accept PIN-based debit card transactions. This requires that your CardPointe account and terminal are configured to support debit processing. *Displays with selection of Processor.* |
| **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. |
| **Enable CC Number Entry on Terminal** *Conditional* | When enabled, allows users to manually enter a credit card number directly on the physical terminal instead of swiping, dipping, or tapping the card. This is typically used when a card cannot be read by the terminal. *Not advised to maintain PCI compliance.* *Displays with selection of Processor.* |
| **Enable Postal Code Prompt** *Conditional* | Prompts the card holder to enter the zip code associated with the card. *Displays with selection of Processor.* |
| **Require Signature** *Conditional* | Displays a signature screen and requires a signature capture from the card holder, which can be further enforced with a minimum transaction amount. *Displays with selection of Processor.* |
| ***Min. Amount Due for Signature Required*** *Conditional* | Option to require signature capture for transactions at or above the minimum amount defined here. *Displays with selection of Processor.* |

## Cost / Target Pricing Tab (Edit screen only)

Cost / Target Pricing is a pricing framework used to estimate the cost of servicing a customer and to set a profitable service price. It combines operational costs—such as labor, truck time, mileage, disposal fees, and material density—with service-specific pricing tiers.



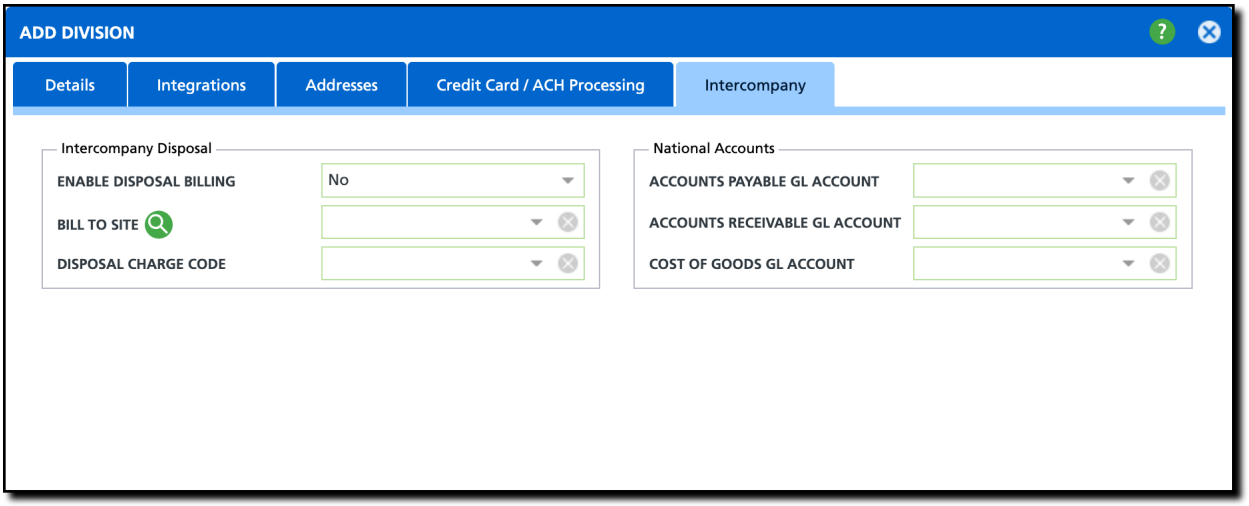

## Field Descriptions

| Field | Description |
|---|---|
| **Effective Date** | Date on which the cost or pricing rule becomes active. This allows rates to change over time while preserving the historical pricing. |
| **Line of Business** | Service category where the cost and the pricing rules apply to. If left blank, then it will apply to all LOBs |
| **Service Region** | Geographic / operating area where the cost and pricing rules apply. If left blank, then it will apply to all LOBs |
| **Material Type** | If a particular material is selected, then the cost and pricing rules only apply to that material type. |
| **Cost Tab** | |
| **Cost / Mile** | Transportation cost assigned to each mile traveled. |
| **Labor Cost / Lift** | Labor cost assigned to a service per lift. A lift could be emptying a container, servicing a customer, or delivering equipment. |
| **Operating Cost / Hour** | Cost of operating the truck and crew per hour. |
| **Disposal Cost** | Cost of the disposal. |
| **Disposal Cost UOM** | Unit of measure used for the disposal, such as ton, pound, cubic yard, etc. |

| | |
|---|---|
| **Markup Factor / Target Margin** | A multiplier value used to convert estimated cost into target selling price. |
| **Map Estimated Time Multiplier** | A multiplier value used to adjust drive or service time compared to a mapping software estimate. A multiplier greater than 1 may account for traffic or site access. |
| **Target Pricing Tab** | |
| **Light, Medium, Heavy - Rate / Cubic Yard** | Target selling rate per cubic yard based on material load. |
| **Light, Medium, Heavy - Pounds / Cubic Yard** | Target selling rate per cubic yard based on weight. |

## 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** |
| **Enable Disposal Billing** | Determines how internal disposal is billed.<br>• **No** - *select this option to disable disposal billing. This is the default setting.*<br>• **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.*<br>• **Yes (Automated GL Batch)** |
| **Bill To Site** | The specific site disposal transactions will be billed against. Requires prior setup of a site.<br><br>⚠ *Note: This field will be deprecated in a future release and is no longer used. To configure the Bill to Site, navigate to **Facility Setup > Disposal Rates** tab. If this field requires an entry, add the entry to save and still navigate to Facility Setup to finish configurations.* |

| | |
|---|---|
| **Disposal Charge Code** | The charge code to be used for internal billing. A charge code for inter-company disposal must be set up beforehand.<br><br>⚠ *Note: This field will be deprecated in a future release and is no longer used. To configure the Disposal Charge Code, navigate to **Facility Setup > Disposal Rates** tab. If this field requires an entry, add the entry to save and still navigate to Facility Setup to finish configurations.* |
| **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 | **Division Id** or **Division Name** |
| Division cost and target pricing for a given **division**. | *Division Cost* | **Division Id or Division Name** |

## Related Articles

Add a New Account (Active)
Add a New Account (Prospect)
Create Account: Screen Field Descriptions
Notification Template
Card Present - Credit Card Terminal Setup