

Basics

Last Modified on 04/17/2026 12:41 pm PDT

Headers

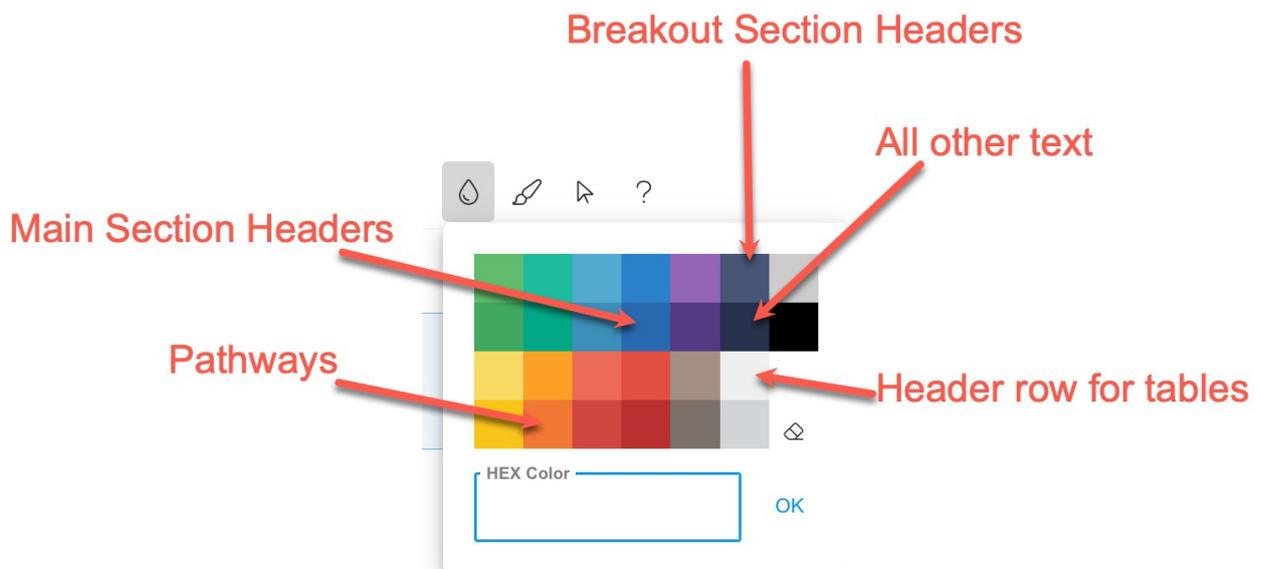
Main Header

- Use Heading 2 for each main section title.
- Color should be blue

Breakout Section Headers

- Use Heading 3 or 4 for each child section of a main section.
- Refer to the Color Scheme below for the color

Color Scheme



In some cases, like the one shown below, you will have to enter the HEX color code if it is not a preset color. Select the colors icon and enter it in the HEX Color text field.

HEX Code for table headers: #CCDDE6 - see image below

Field	Description
Pending	
Type	Indicates the type of transaction.
Reference #	Identifies the ID for the transaction.
Errors	Indicates any errors posted against the transaction.
AR Period	The period in time when the account is in arrears.
Date	The date the transaction was processed.
Count	The total count of GL Accounts the Billing Batch includes.

Hex Code for special notes/criteria in the Field Description tables: #FFF6D3 (Soft highlighter yellow)

Status Management Field Descriptions

Only the Status Management fields from the Add/Update Account Class screen are included below. Additional information on Account Class can be found here: [Account Class Setup](#).

Field	Description
Enable Automatic Status Update	Select 'Yes' to enable the system to automatically update an account's status. This setting applies to both applying and removing auto-credit hold and other automatic status updates.
Auto Credit Hold Past Due Days	Specifies how many days a single invoice must be past due before auto-credit hold is applied. An account requires just one past-due invoice for the credit hold to take effect. 'Auto Credit Hold Placement' must be enabled for settings here to apply.
Auto Credit Hold Minimum Past Due Amount	Specifies how much an account must be past due before auto-credit hold is applied. 'Auto Credit Hold Placement' must be enabled for settings here to apply.
Auto Inactive Account/Site Days	Identifies how many days an account must be past due before it is automatically updated to an inactive status. This value must be greater than 0. 'Auto Credit Hold Placement' must be enabled for settings here to apply.
Auto Credit Hold Placement	Setting that directly applies auto-credit hold. This field must be enabled for 'Auto Credit Hold Past Due Days' and 'Auto Credit Hold Minimum Past Due Amount'.
Auto Credit Hold Removal	Setting that directly applies auto-credit hold removal. This field must be enabled for 'Auto Credit Hold Past Due Days' and 'Auto Credit Hold Minimum Past Due Amount'.
Status Update Time	Indicates the time the system will automatically update statuses to inactive. Recommended to schedule this during off-hours when customer activity is low and to avoid disrupting operations.

Images

Main Image

Main images should be Left aligned to the page. By default, they will upload as centered. To left align:

1. Click on the image
2. Select the Align drop down and select Align Left

Related Articles:

[Add Related Article](#)

Recommend On Pages: [?](#)

Tags

Type tag name and hit enter or tab...

Subsections

Indented sections, images should be right aligned stretching from the right side of the page to the left side, aligning with the section header.

Subsections

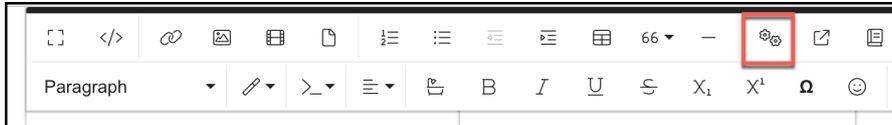
Indented sections, images should be right aligned stretching from the right side of the page to the left side, aligning with the section header.

Align image with header

The screenshot shows a software interface with a sidebar on the left containing navigation icons for HOME, ACCOUNTS, SALES, OPERATIONS, ACCOUNTING, REPORTS, DASHBOARD, and SETUP. The main content area is divided into sections: REQUESTS, TASKS (with 1 item), and APPOINTMENTS (with 3 items). A table is visible with columns for date, time, and description. A context menu is open over the table, and a red arrow points to the 'Align Right' option.

Snippets

Snippets are where you will find the Table of Contents and Expand/Collapse options.



Insert Table of contents:

- This will default to only include Heading 2
- Select the Snippet icon and enter 'TOC'. Select 'Article TOC' when it displays.
- The table of contents should be placed under the pathway if it is used.

Use Expand and Collapse

To expand/collapse a section:

1. Select Snippet and enter '**Expand Start**' before the section you would like to expand/collapse.
2. Select Snippet and enter '**Expand End**' after the section you would like to expand/collapse.
3. Select Save.

Example:

```
{{snippet.expandStart}}
```

all content you want to be hidden until expanded

```
{{snippet.expandEnd}}
```

Use Expand All / Collapse All

There are some articles that have many Expand / Collapse sections; while this is great for readability, it can hinder searching. The browser's **CTRL+F** functionality only searches visible text; it cannot "see" or find keywords hidden within collapsed sections. To solve this, you can add **Expand All / Close All** buttons to the top of your article. This enables users to see all content, making it significantly easier to find information when searching for text. There is a snippet that creates the buttons with some helpful texts and the divider lines.

To add the snippet:

1. Select Snippet and enter '**Expand / Close All Sections**'
2. Select Save.

When to use: Use this for any article that has more than 3 or 4 "Read More" toggles.

Placement: Always place the buttons at the very top of the page so the user sees them before they start scrolling.

Consistency: Using these buttons creates a standard "Navusoft Manual" feel across our entire Knowledge Base.



Use Setup Alert

In Setup, there are some high-profile configurations. Once the setup item has been established, changes to the required fields should not be done for the most part. So, there is a red alert that can be added, as needed.

1. Select Snippet and enter '**SetupAlert**'
2. Select Save.



Restrictions

For each article the following restrictions should be selected:

- Remove Feedback Ability
- Remove Comment Ability

Restrictions:

- Exclude from search results
- Hide from table of contents
- Hide from category landing page
- Hide from article lists
- Remove "PDF" icon
- Remove feedback ability
- Remove comment ability

Active Version: 1.00

All Versions:

1.00 PUBLISHED VIEWING

[Create a new version](#)

Version Note:

Add Related Articles

Before publishing the article, manually search and add the related articles. If there aren't any you can leave it. Otherwise add what makes sense.

Create the Related Articles Section

Delete/End a Service Note:

✓ If a historical record of a service note must be kept, consider adding an end date instead of deleting the note. This will ensure the visibility of the service note on the relevant work orders within the designated start and end date time frame, while preventing it from being added to any future work orders.

1. From the Active Service section of an account, select the **green dot icon** for the active service you would like to end/remove the note from. This will open the "Service Additional Fields" editor.
2. Select the "Delete Site Service Note" icon that is displayed to the right of the note. This will trigger a Confirmation popup.
3. Select "Yes" to confirm the cancel and the service note will be removed from the active service and all work orders it was previously applied to.

{{snippet.expandEnd}}

Related Articles:

- [Note Type Setup](#)
- [Overview of Note Types](#)
- [Site Level Notes](#)

Add horizontal line

Horizontal Line icon available in editor

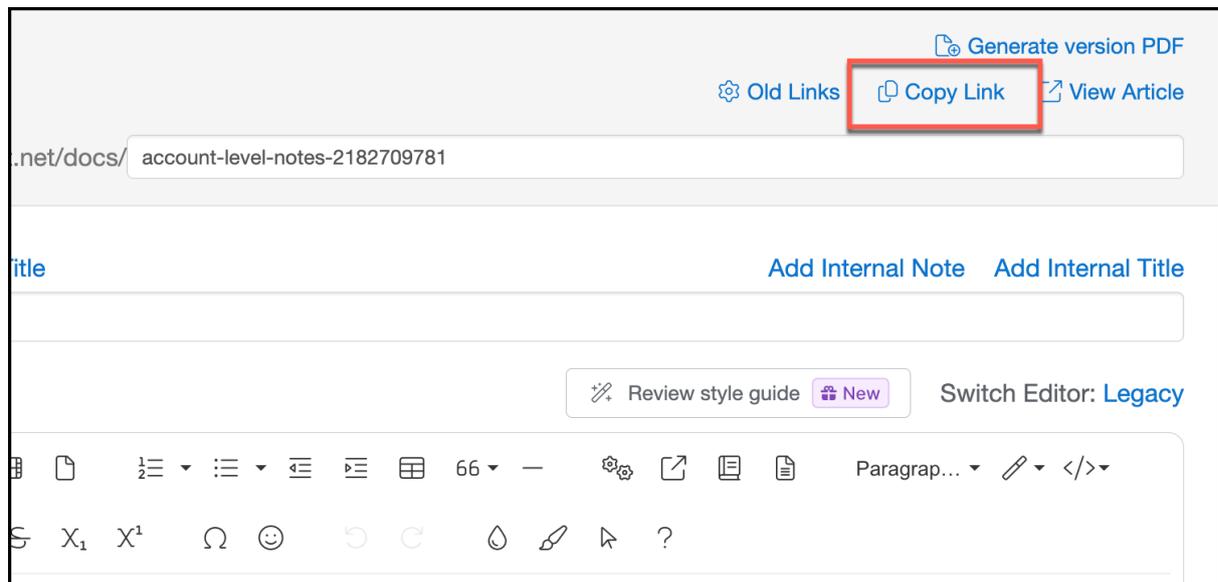
1. From the Editor toolbar at the top of the screen, select the **Horizontal Line** option.
 - This will insert a horizontal line where your cursor is.
2. Enter the Names of each article you would like to link in list order.

Link Articles Pages

This part is a bit tedious as you will need to open the article you are linking in a separate window where you can

copy its link from and paste it here.

1. Open the article you would like to link and select **Copy Link**.



2. Return to the article you are linking to (the one you are building the Related Articles section out for) and use your mouse to highlight the name of the article the link is for. With the article name highlighted, select the **link icon** from the editor, then:

- Paste the copied URL into the **URL field**
- Verify the **Text field** shows the highlighted text (the article name)
- Select the **Open in new tab** check box
- Click **Update** or **Insert** and the link is added

The image shows a rich text editor interface. In the top toolbar, the link icon (two interlocking circles) is highlighted with a red square. A red arrow points from this icon to a modal form. The form contains the following fields and options:

- URL:** A text input field containing the value `.net/docs/site-level-notes-2217115649`. A red arrow points to this field.
- Text:** A text input field containing the value `Site Level Notes`. A red arrow points to this field.
- Title:** An empty text input field.
- Name:** An empty text input field.
- Open in new tab:** A checkbox that is checked, with a red arrow pointing to it.
- Update:** A blue button located at the bottom right of the form.

Background text from the editor is partially visible, including "Pathway: Accounts" and "Account level notes repository of inform".

Related Articles

[Versioning Existing Articles](#)

[Snagit](#)

[Build a New Article](#)
