

Basic Navigation

Last Modified on 09/10/2024 11:32 am EDT

This article provides an overview of basic navigation within the Navusoft product.

REQUESTS	TASKS	QUOTES/CONTRACTS	APPOINTMENTS	ACTIVITIES	Alerts Activities Views			
Cancellation: Price Polly Pie 2 Received - 15 days old	Aug 01 2024 Credit Request Wild Mountain	Food4Less A-New Business-Acquisition \$ 320.00	Jul 29 2024 2:00 pm Introduction	Today	12:35 pm to 2:54 pm	0 Alerts	1 Activities	3 Views
		Starstruck New Business - Required Bel... \$ 300.00		2:54 pm	Site Viewed	test 123		
		Polly Pie 2 New Business Vendor \$ 100.00		12:39 pm	Site Viewed	Studio A		
		Pop Up Home A-New Business-Acquisition \$ 75.00		12:39 pm	Site Created	Studio A		
				12:35 pm	Site Viewed	Wild Mountain		
				Tue 07/23/24	8:26 am to 1:45 pm	0 Alerts	0 Activities	2 Views
				1:45 pm	Site Viewed	Pho Ga District		
				8:26 am	Site Viewed	Wild Mountain		
				Mon 07/22/24	8:00 am to 10:47 am	0 Alerts	0 Activities	4 Views
				10:47 am	Site Viewed	Joe Loftin		
				8:02 am	Site Viewed	Eleven Bakery		
				8:02 am	Site Viewed	CITY OF LIBERTY		
				8:00 am	Site Viewed	Wild Mountain		
				Fri 07/19/24	9:29 am to 1:51 pm	0 Alerts	0 Activities	4 Views
				1:51 pm	Site Viewed	CITY OF LIBERTY		
				10:10 am	Site Viewed	Eleven Bakery		
				10:10 am	Site Viewed	Wild Mountain		
				9:29 am	Site Viewed	WILLIAM CODY STEGALL		

User Account

Select the user account drop down to log out, edit your screen display and account information, or to reference the system version your account is operating on.

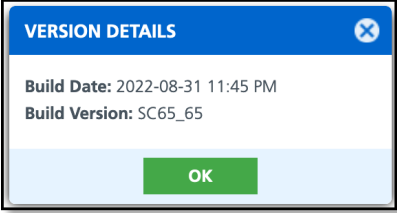
The screenshot shows the user account dropdown menu for SARAH JAMES. The menu is open, displaying the following options:

- Log Out
- Locale
- User Profile
- Link External Calendar / Email
- Re-sync Appointments
- Generate Screen Share Code
- Join Screen Share Session
- Refresh Reference Data
- About Navusoft

Below the menu, two user profiles are visible:

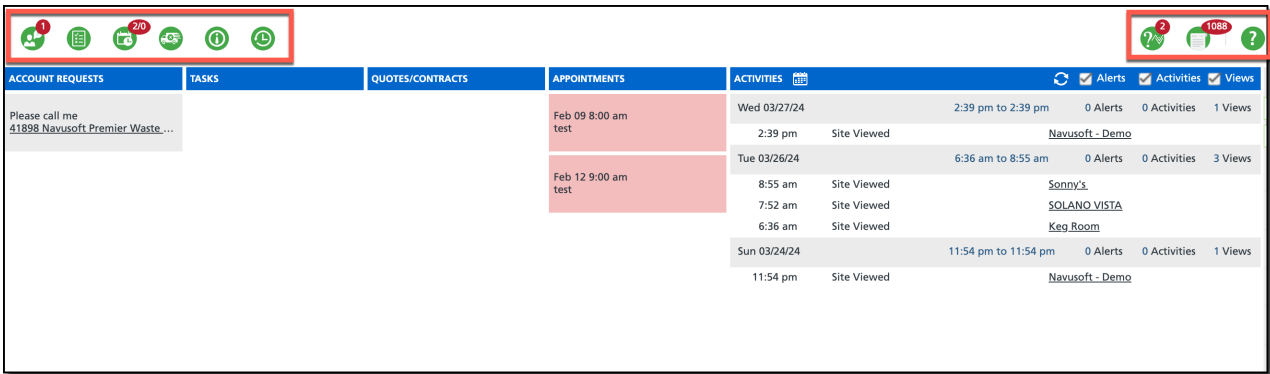
- Alice Cameron (CSR)
- Alvin Cannon (Operations Mgr)

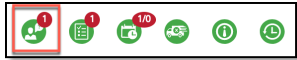

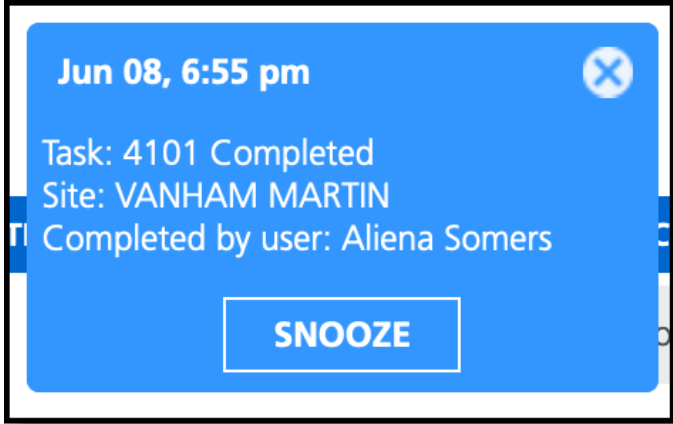

Tool	Description
Logout	Logs you out of the Navusoft system.
Locale	Changes the location settings for all displays.


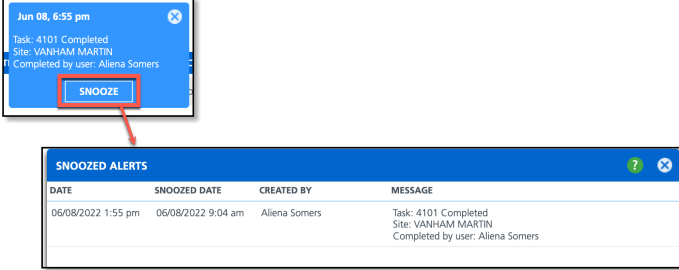



Tool	Description
<p style="text-align: center;">User Profile</p>	<p>Allows for the editing of the following user information:</p> <ul style="list-style-type: none"> • Contact information (phone only) • Upload a profile image that displays with your name in Navu Chat • Change your Default Homepage • Upload a signature image that can be used for signing quotes/contracts/proposals.
<p style="text-align: center;">Link External Calendar/Email</p>	<p>Option to sync your external email account to Navusoft. More information can be found here: Sync External Email and Appointments</p>
<p style="text-align: center;">Re - Sync Appointments</p>	<p>Option to re-sync appointments from an external email account into Navusoft.</p>
<p style="text-align: center;">Join Screen Share Session / Generate Screen Share Code</p>	<p>Option to share your screen with other users including driver apps. This does not include an audio connection.</p> <p>Share your screen:</p> <ol style="list-style-type: none"> 1. Select Generate Screen Share Code. 2. Share code with other user(s). <p>Join a screen share session:</p> <ol style="list-style-type: none"> 1. Select Join Screen Share Session 2. Enter the session code you received from the host when prompted. <p>Screen share will only share screens within the Navusoft application. Navigating to anything outside of Navusoft is not shared.</p>
<p style="text-align: center;">Refresh Reference Data</p>	<p>Refreshes the (user's) system's data without having to log out and back in.</p>
<p style="text-align: center;">About Navusoft</p>	<p>Displays the build version your system is operating on.</p> 

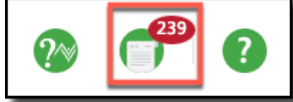

Notification Icons

Notification icons display horizontally along the top of the screen. A red bubble displays with the icon to indicate attention is needed.



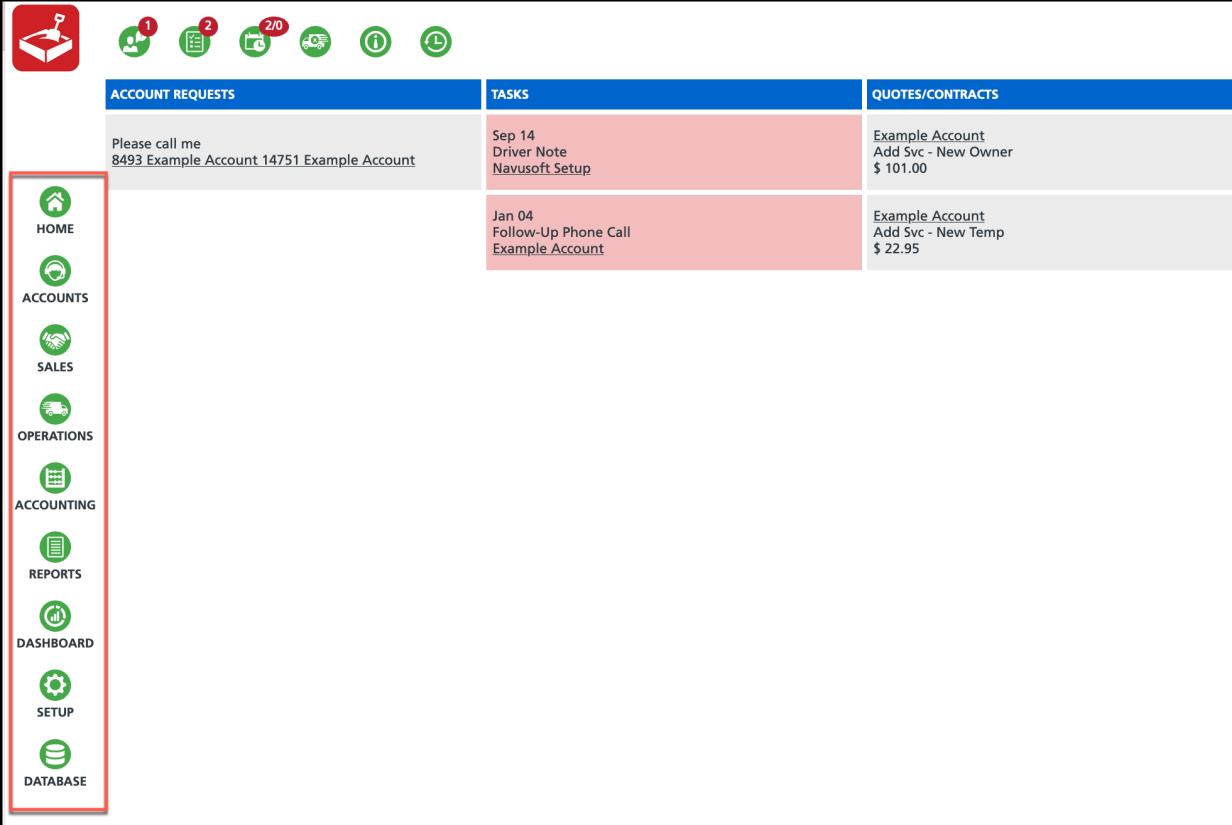
Icon	Description	Bubble Notification
Icons Displayed on Left		
Account Request	<p>Select the Account Request icon to view recent customer request activity such as a request for additional pickup or call back.</p> <p>An Account Request list also displays in the Requests column of the Home (module) screen.</p>	 <p>Displays total count of all customer requests assigned to the user.</p>
Tasks	<p>Select the Tasks icon to review tasks you have created or another user has assigned to you.</p> <p>When a task is marked as complete the user who created the task will receive a popup notification with the information of who completed the task and the date and time.</p> <p>Select 'Snooze' and the notification will be redirected to Snoozed Alerts for future viewing. Otherwise, select the 'X' in the upper right corner to close the notification.</p>	  <p>Notification displays a total count of the logged in user's open tasks.</p>
Appointments	<p>Select the Appointments icon to view current and upcoming appointments.</p>	 <p>Notification displays the number of appointments a user has scheduled.</p>

Icon	Description	Bubble Notification								
<p>Cancellations</p>	<p>Select the Cancellations icon to view customers who are cancelling their accounts.</p>	 <p>Notification displays the total count of customer cancellations.</p>								
<p>Snoozed Alerts</p>	<p>Select the Snoozed Alerts icon to view any pop-up alerts that were previously snoozed.</p>  <table border="1" data-bbox="443 645 1086 763"> <thead> <tr> <th>DATE</th> <th>SNOOZED DATE</th> <th>CREATED BY</th> <th>MESSAGE</th> </tr> </thead> <tbody> <tr> <td>06/08/2022 1:55 pm</td> <td>06/08/2022 9:04 am</td> <td>Aliena Somers</td> <td>Task: 4101 Completed Site: VANHAM MARTIN Completed by user: Aliena Somers</td> </tr> </tbody> </table>	DATE	SNOOZED DATE	CREATED BY	MESSAGE	06/08/2022 1:55 pm	06/08/2022 9:04 am	Aliena Somers	Task: 4101 Completed Site: VANHAM MARTIN Completed by user: Aliena Somers	 <p>Notification displays the total count of alerts that have been snoozed.</p>
DATE	SNOOZED DATE	CREATED BY	MESSAGE							
06/08/2022 1:55 pm	06/08/2022 9:04 am	Aliena Somers	Task: 4101 Completed Site: VANHAM MARTIN Completed by user: Aliena Somers							
<p>Recent Activity</p>	<p>Select the Recent Activity icon to view a time stamped history of your user account. This includes customer accounts you have viewed, tasks you have completed, and anything else you have done while logged into your account.</p> <p>Select the activity, such as the account name to access the location again.</p>	 <p>Does not display a notification.</p>								
<p>Icons Displayed on Right</p>										
<p>Navu Requests</p>	<p>Select the Navu Requests icon to create new ticket requests, track and communicate on existing tickets and view a history of archived tickets.</p> <p>There are two types of users for the Navu Requests tool: General Users and Navu Request Administrators.</p> <ul style="list-style-type: none"> • General users can create ticket requests but can only submit them to their internal Navu Request Administrator for review and final submission to Navusoft. <ul style="list-style-type: none"> ◦ <i>This level of users can only see the tickets they have created.</i> • Navu Request Administrators can create tickets, review general users ticket requests and submit ticket requests to Navusoft. <ul style="list-style-type: none"> ◦ <i>This level of users can see all ticket requests from all users.</i> <p>Further information and how to use the Navu Requests tool can be found here: Navu Requests</p>	<p><i>Navu Request Administrators</i></p> <ul style="list-style-type: none"> • Displays a total count of open tickets for all users. <p><i>General Users</i></p> <ul style="list-style-type: none"> • Displays a total count of open tickets for the individual user. 								

Icon	Description	Bubble Notification
Unread Documentation	Select the Unread Documentation icon to access the Navusoft Knowledge Base and Release Notes. All documentation reflects the most recent version of the Navusoft system.	Notification indicates documentation is available and a total count of documentation the user has not reviewed. 
Context Help	Select the Context Help icon to view documentation related to the page you are viewing. Documentation is currently being built out for each of the modules and is an ongoing process.	Does not display a notification. 

Modules

Modules display vertically along the left side of the screen. Users will only see modules they have been granted permission to (permissions are assigned by a system administrator and are based on the user's role and responsibilities). Modules consist of tools that users need to perform the duties of their job.



ACCOUNT REQUESTS	TASKS	QUOTES/CONTRACTS
Please call me 8493 Example Account 14751 Example Account	Sep 14 Driver Note Navusoft Setup	Example Account Add Svc - New Owner \$ 101.00
	Jan 04 Follow-Up Phone Call Example Account	Example Account Add Svc - New Temp \$ 22.95

Module	Description
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Module	Description
Home	The Home module is the landing page users see when they log in to their account. User accounts are set up to view any of the three default homepage options: Dashboard, Recent Activity and Sales. Right-click on the Home module to temporarily change the homepage view to one of the other options. To permanently change your homepage, go to your User Profile in your User Account.
Accounts	The Accounts module contains tools related to creating and servicing customer accounts.
Sales	The Sales module contains tools to track and manage contracts and leads.
Operations	The Operations module contains tools needed for daily dispatch operations such as assigning routes, creating work orders, and other day-to-day operations.
Accounting	The Accounting module contains tools needed for billing, managing accounts receivable, payment setup and other accounting/financing tasks.
Reports	Includes all core and customizable reports.
Dashboard	The Dashboard module provides a quick diagnostic in areas such as Accounts Receivable, Revenue, Growth and Productivity.
Setup	The Setup module controls the setup for the modules and their tools based on customer preference. Access to this module should be restricted to only administrative users who understand their system setup.
Database	The Database module contains tools that use database access to perform a task. Permissions to this module should be restricted.

Default Homepage Examples

A Default Homepage selection is made at the time the user account is created. Consideration of the user's role will help in determining which of the default homepage options to choose.



Users can switch to view any of the other Home screens by right-clicking on the Home module and selecting the screen they would like to view. If a user decides they would like to change their default homepage they can do so by accessing their user account, selecting User Profile and changing the selection in the Default Homepage drop down field.

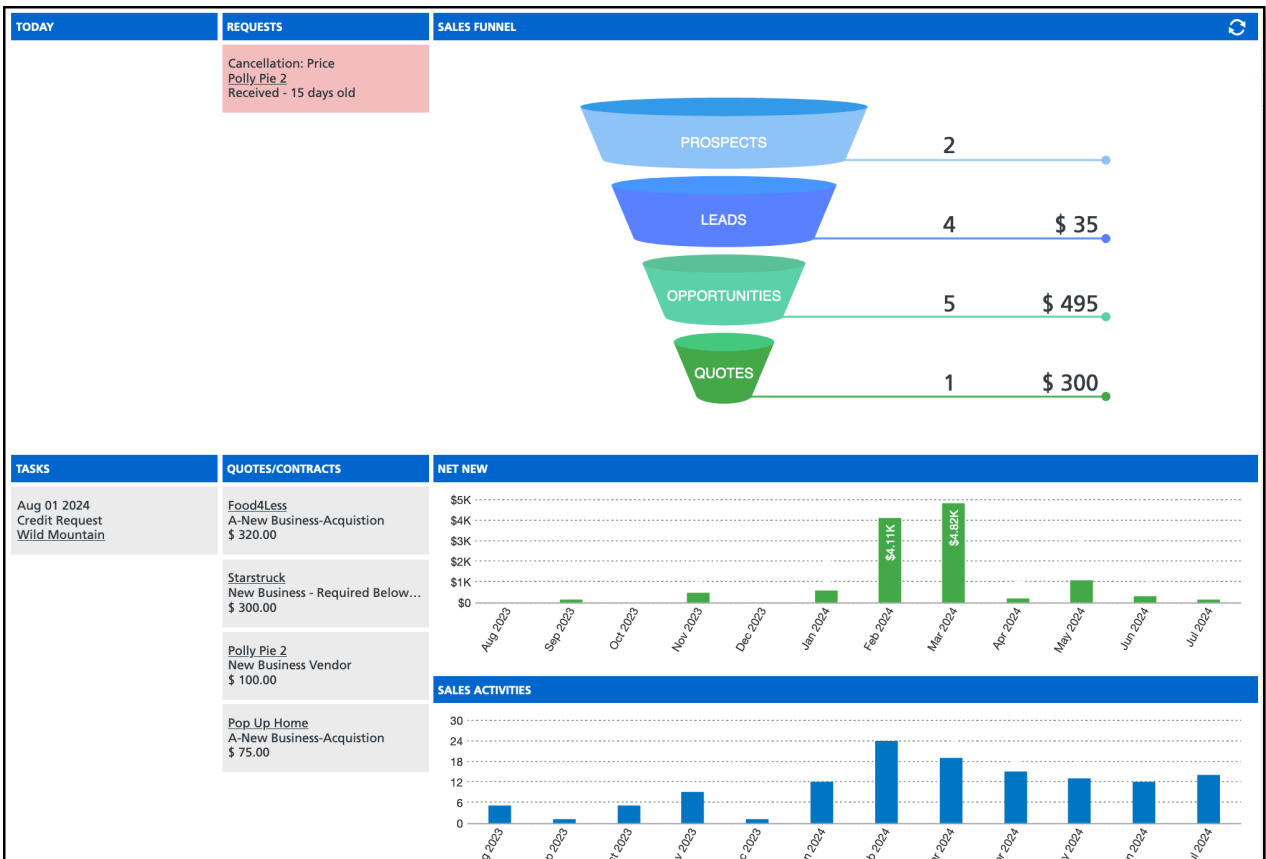
Recent Activity

The Recent Activity view is the default display that shows the user's recent activities within the Navusoft system, along with the activities of accounts or sites they are linked to.

REQUESTS	TASKS	QUOTES/CONTRACTS	APPOINTMENTS	ACTIVITIES
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		Starstruck New Business - Required Bel... \$ 300.00		2:54 pm Site Viewed test 123
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		Pop Up Home A-New Business-Acquisition \$ 75.00		12:39 pm Site Created Studio A
				12:35 pm Site Viewed Wild Mountain
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				1:45 pm Site Viewed Pho Ga District
				8:26 am Site Viewed Wild Mountain
				Mon 07/22/24 8:00 am to 10:47 am 0 Alerts 0 Activities 4 Views
				10:47 am Site Viewed Joe Loftin
				8:02 am Site Viewed Eleven Bakery
				8:02 am Site Viewed CITY OF LIBERTY
				8:00 am Site Viewed Wild Mountain
				Fri 07/19/24 9:29 am to 1:51 pm 0 Alerts 0 Activities 4 Views
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				9:29 am Site Viewed WILLIAM CODY STEGALL


Sales Representative

The Sales Representative view displays the sales charts and stats for the company.



System Admin Dashboard

The System Admin Dashboard offers a brief system overview of user security and serves as a hub for creating and tracking support tickets.

USERS		PERMISSIONS		USAGE	PROJECTS			
Licensed	Active	Pending Review	Tax Verification	New	In Progress	Completed		
46	70	0	14	1	2	1		
SUPPORT REQUESTS								
Submission Pending	Our Response Pending	With Support Team	With Development Team	Installation Pending	Closed Within 30 Days	Total Closed		
1	1	1	0	0	0	11		
RECENT ACTIVITY								
CREATED WITHIN	Last 24 Hours	ACTION TYPE	All					
ACTION	REQUEST ID	SUBJECT					CREATED	

Navu Chat

Communicate with other users in your organization using the Navu Chat feature. This tool supports both individual and group chat style sessions.

Keyboard Shortcuts

Windows PC

- Alt+Shift+S = Customer Search
- Alt+Shift+C = Create Account
- Alt+Shift+O = Order Processing
- Alt+Shift+M = Sales Management
- Alt+Shift+B = Billing
- Alt+Shift+D = Dispatch
- Alt+Shift+Z = Back button

Mac / Linux

- Opt+Shift+S = Customer Search
 - Opt+Shift+C = Create Account
 - Opt+Shift+O = Order Processing
 - Opt+Shift+M = Sales Management
 - Opt+Shift+B = Billing
 - Opt+Shift+D = Dispatch
 - Opt+Shift+Z = Back button
-