

Navu Requests - Create a Ticket Request

Last Modified on 05/31/2024 10:53 am EDT

Pathway: Home Screen; Navu Requests Icon

The Navu Requests tool provides all system users a way to report issues and request help while using the Navusoft application. General users of Navu Requests can create ticket requests for any reason, however, when a general user submits their ticket request it is placed in a Submission Pending status for their internal Navu Request Administrator to review and submit on to Navusoft.



After users have submitted a ticket request they can then track its status and add additional information to the request at any time.

ADD NAVU REQUEST

REQUEST TYPE: Training Request | USER: Aliena Somers (Admin-NS) | PRODUCTS: Core | MODULES: Accounting | SCREEN / REPORT: Billing

SUMMARY: Training Request on Billing

Description | Details | Attachments

Rich Text Editor Content:
Hello,
We would like to set up a training for our new hires.
Here are the available dates:
• 6/3 anytime
• 6/5 PM only
• 6/10 anytime

SAVE | SUBMIT TO NAVUSOFT

Field and Tab Descriptions

Field	Description
Request Type	Indicates what category the request falls into. This helps determine where the request gets routed once submitted to Navusoft.
User	Defaults to the user who created the request.
Products	Indicates the product (Core, NavuNav, NavuSales) the ticket applies.
Module	Indicates the module the request is for. Only one module may be selected. Use the Description tab to indicate if any other modules should be included in the ticket.
Screen/Report	Indicates which screen or report associated to the module the request applies.

Field	Description
Summary	Include a brief summary of what the request is about. <i>Example: "New Hire Training Request" or "New User Account Email Not Sending"</i>
Description	Provide a detailed description about what the request is for. This may include replication steps for issues, available dates and times for training, and any additional supporting information.
Details	Tracks activity and notes for the ticket. Select the Details tab to add and review notes as well as review status changes for the ticket.
Attachments	Add attachments such as error messages and screen captures in the Attachments tab.

Create a Ticket Request

1. Select **Navu Requests** from the Notification Icon tool bar.
 2. Select the **plus icon** in the upper left corner to open the 'Add Navu Request' popup editor.
 3. Select the **Request Type** and **Module**. Selections from other fields are not required, but help in specifying what the request is about.
 4. Enter a brief description in the **Summary** field.
 5. Select the **Description** tab. Provide a detailed description of the request in the Detailed Description box. This may include replication steps, available dates and times for training, and any additional supporting information for the request.
 6. Select the **Attachments** tab to add any attachments to go along with the request such as screen shots of an error message.
 7. Select **Request Submission Approval** (general user option) or **Submit to Navusoft** (administrative user option).
 - If you are a general user the ticket will be held in a Submission Pending status until your internal Navu Request Administrator has reviewed and submitted it on to Navusoft.
 - If you are an administration user you can submit tickets you've created directly to Navusoft.
-