

Learning Navusoft - Articles to Read

Last Modified on 09/14/2026 11:51 am PDT

Overview of Navusoft

There are three main components of Navusoft:

1. **Navusoft** (desktop application) - includes customer service, billing, operations, and setup
2. **NavuNav** (soon to be called NavuLink) - mobile app for drivers to use to communicate back to Navusoft
3. **Customer Portal** - desktop application used by our customers' customers to view their account services and balances and to manage payments.

First, focus on Navusoft, but remember the players:

- *Customer Service* - uses the **Accounts** module (primarily)
- *Billing* - uses the **Accounting** module
- *Dispatch and Scale Operators* - use the **Operations** module
- *I/T and Admin folks* - use **Setup** to configure, reconfigure, and manage users and roles
- *Sales* - uses **Sales** to create prospect accounts, track leads and proposals
- *Everyone* - can use **Database** and **Reports** modules to drill into data with respect to their business focus.
- *Everyone* - uses **Admin Portal** (aka Help or Navu Requests) to submit tickets.

Navusoft

- [Basic Navigation](#)
- Glossary - will send

Navu Requests

- [Admin Portal](#)
- [Navu Requests - Create a Ticket Request](#)
- [Navu Requests - Close Ticket Requests](#)

Accounts

- [Account Screen Overview](#) (aka Customer Service screen)
- [Add a New Account \(Active\)](#)
- [Add a New Site & Move Between Sites](#)
- [Search For Accounts and Sites](#)
- [Customer Service \(Calendar\)](#)
- [Active Services Overview](#)
- [AR History Overview](#)
- [AR History Account Transactions](#)
- [Add Account Request](#)
- [Overview of Note Types](#)

Operations

- [Dispatch Basics](#)
- [Dispatch Views](#)
- [Dispatch - Services List Overview](#)
- [Assign Trucks and Drivers](#)
- [Dispatch - Route Timeline Overview](#)
- [Screen Share: Create or Join a Screen Share Session](#)
- [Inbound / Outbound Basics](#)

Accounting

- [Billing Screen Overview](#)
- [AR Aging Management - Accounting](#)
- [AR Payment Batch](#)
- [Auto Pay Management](#)
- [Status Management](#)
- [Unapplied Management](#)

Setup - the core of the system so that each customer can use Navusoft to run their business the way they are generally use to, with their own logo, their own words (most of the time), and their own name for "things".

Here are some of the key setup screens:

- **System Setup**
 - [Division Setup](#)
 - [User Accounts](#)
 - [Permission Setup](#)
 - [Role Setup](#)
- **Account**
 - [Account Class Setup](#)
 - [Appointment Type Setup](#)
 - [Attachment Type Setup](#)
 - [Note Type Setup](#)
- **Services**
 - [Equipment Type Setup](#)
 - [Service Code Setup](#)
 - [Service Region Setup](#)
 - [Charge Code Setup](#)
 - [Available Service Codes](#)
 - [Available Charge Code Setup](#)
- **Operations**
 - [Facility Setup](#)
 - [Material Type Setup](#)
 - [Truck Setup](#)
 - [Route Setup](#)
 - [Yard Setup](#)
- **Accounting**
 - [Bill Group Setup](#)
 - [Tax Setup](#)
 - [Tax Region Setup](#)
 - [Term Setup](#)

NavuNav

- [Navusoft Video Overview](#)
- [NavuNav Screen Overview \(Android\)](#)

Customer Portal

- [Customer Portal Setup](#)
- [Customer Portal Views](#)

