

NAVYNT

Business Command Platform

USER GUIDE

A practical walkthrough of the current web application — from daily work to opportunity management, partner operations, reporting, administration and governance.

Built from the current application source supplied for this guide.

TODAY

**Run the business
with clarity**

TOMORROW

**Prepare what
comes next**

Before you start

A note about the screenshots in this guide

The supplied application package contains the current Navynt interface, but it does not contain a live customer workspace or live record data.

- The screen images in this guide are current-build screen references based on the actual feature labels, navigation and UI structure in the supplied application.
- They intentionally do not expose customer data, credentials or tenant information.
- Your live Navynt workspace will populate the same areas with your own organizations, opportunities, people, tasks, reports and other records.
- Buttons and menu items can also vary according to the user's role and permissions.

For a public help center, this guide can later be refreshed with sanitized screenshots from a dedicated demo tenant.

Dashboards

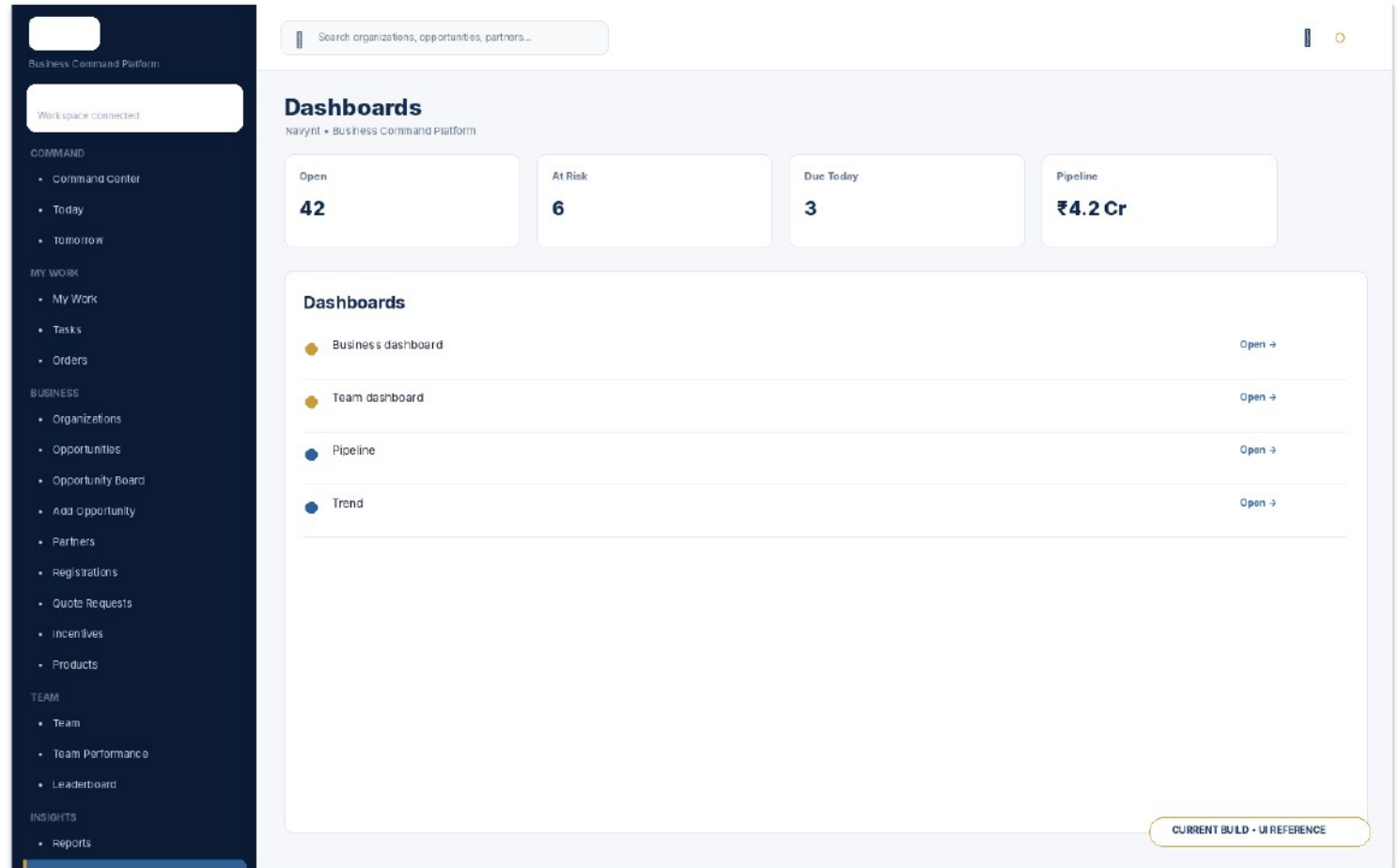
Your management snapshot: pipeline, status distribution, quarterly trend, owner split and top opportunities.

WHAT IT DOES

Your management snapshot: pipeline, status distribution, quarterly trend, owner split and top opportunities.

HOW TO USE IT

- Start here for the overall business view.
- Click KPI cards, chart bars or rows to drill into the underlying opportunities.
- Use Save All Data as Excel for an offline working copy.



Command Center

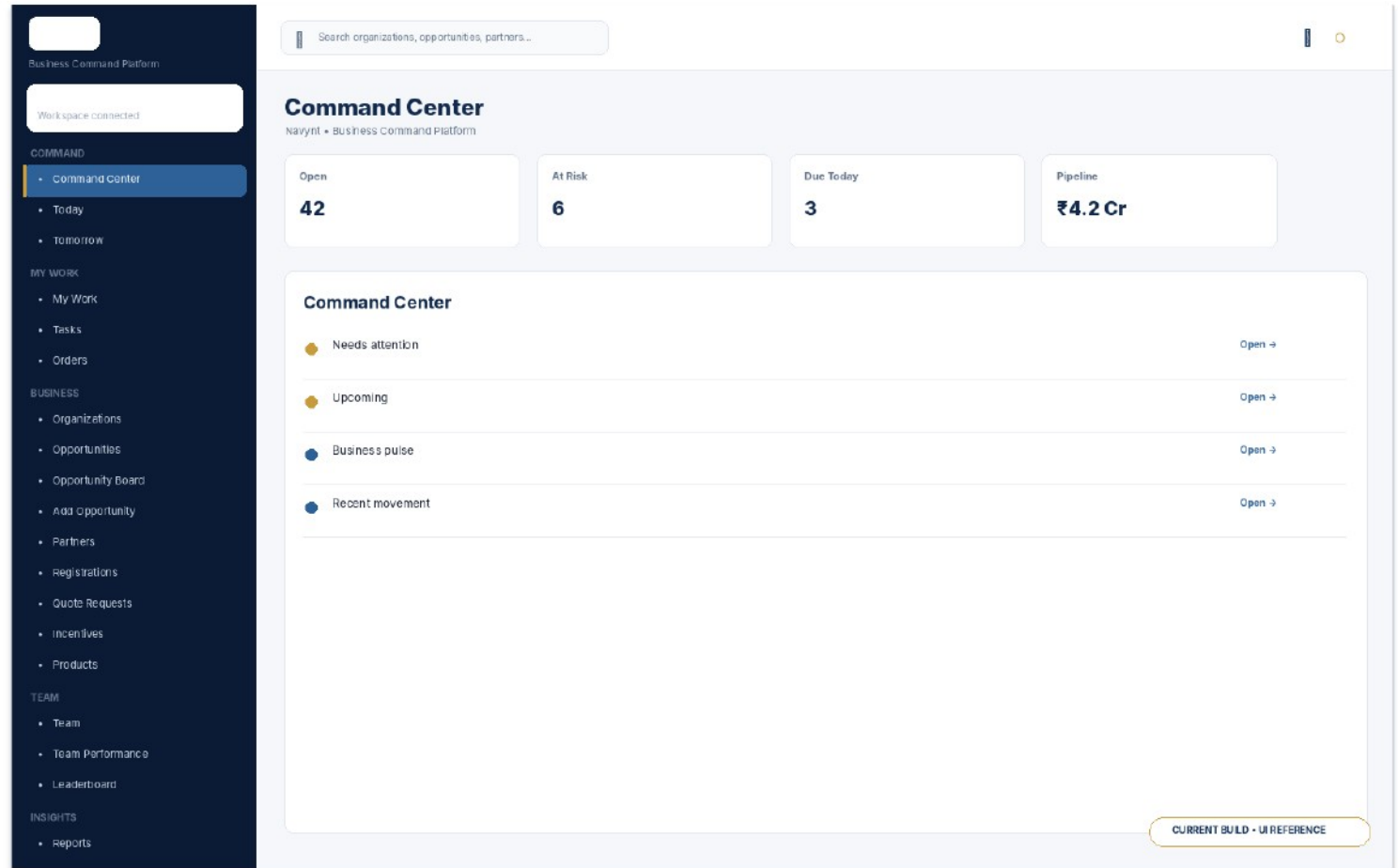
The daily command center for what matters, what is at risk, and what happens next.

WHAT IT DOES

The daily command center for what matters, what is at risk, and what happens next.

HOW TO USE IT

- Review Business Pulse and Needs Attention first.
- Use Open, At Risk and Renewal Risk to focus the day.
- Use Business Movement, Recent Changes and Upcoming to prepare the team.



Today

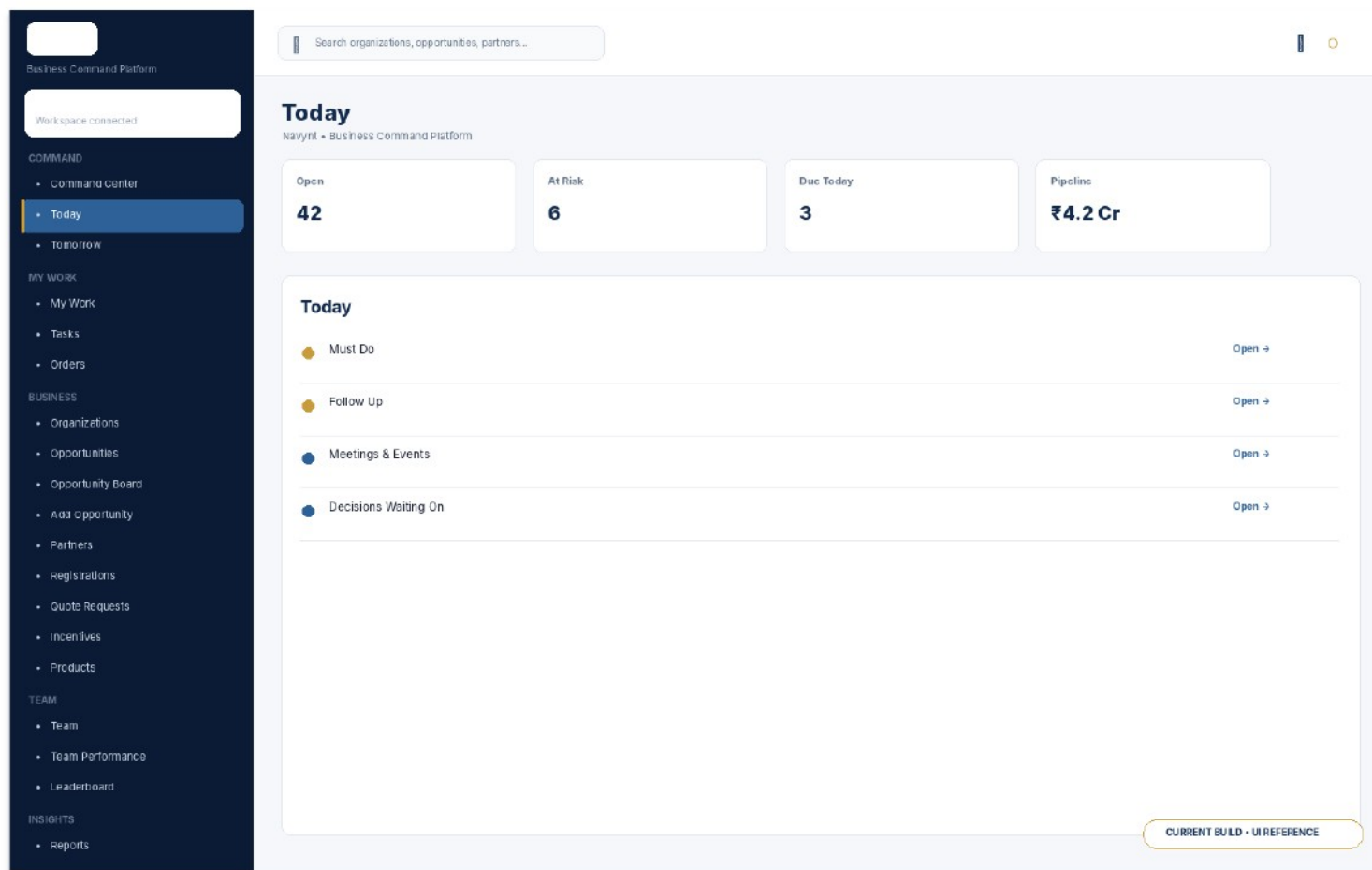
A focused work queue for immediate actions, meetings, decisions and follow-ups.

WHAT IT DOES

A focused work queue for immediate actions, meetings, decisions and follow-ups.

HOW TO USE IT

- Work through Must Do and Follow Up items.
- Check Meetings & Events and Decisions Waiting On.
- Mark completed work so the queue stays clean.



Tomorrow

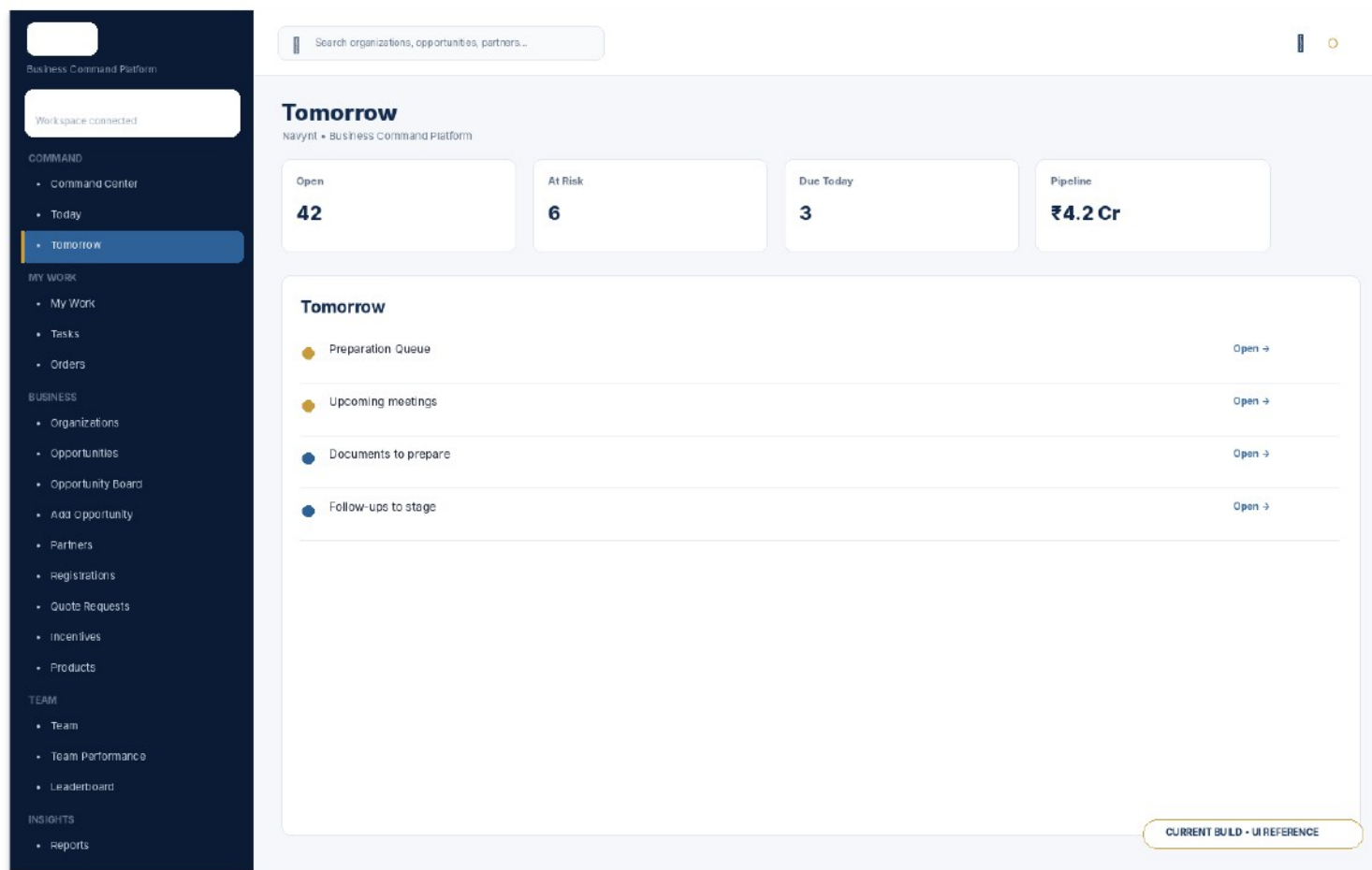
A preparation view for upcoming work so the next business day starts with a clear plan.

WHAT IT DOES

A preparation view for upcoming work so the next business day starts with a clear plan.

HOW TO USE IT

- Review the Preparation Queue.
- Prepare documents, owners, meetings and follow-ups before they become urgent.
- Use this as an end-of-day planning habit.



My Work

A broader workload view showing your commitments, team work, waiting items and overdue work.

WHAT IT DOES

A broader workload view showing your commitments, team work, waiting items and overdue work.

HOW TO USE IT

- Use My Work for personal ownership.
- Use Team Work to understand distribution and bottlenecks.
- Check Waiting On and Overdue regularly.

The screenshot displays the 'My Work' dashboard within the Navynt Business Command Platform. The interface features a dark blue sidebar on the left with a navigation menu categorized into COMMAND, MY WORK, BUSINESS, TEAM, and INSIGHTS. The 'MY WORK' section is currently selected. The main content area has a light blue header with a search bar and a title 'My Work' followed by 'Navynt • Business Command Platform'. Below the header, there are four summary cards: 'Open' (42), 'At Risk' (6), 'Due Today' (3), and 'Pipeline' (₹4.2 Cr). The main body of the dashboard lists four items: 'My priorities', 'Due today', 'Overdue', and 'Recently updated', each with a corresponding icon and an 'Open →' link. At the bottom right, there is a button labeled 'CURRENT BUILD • UI REFERENCE'.

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- Leaderboard

INSIGHTS

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Search organizations, opportunities, partners...

My Work

Navynt • Business Command Platform

Open	At Risk	Due Today	Pipeline
42	6	3	₹4.2 Cr

My Work

- My priorities [Open →](#)
- Due today [Open →](#)
- Overdue [Open →](#)
- Recently updated [Open →](#)

CURRENT BUILD • UI REFERENCE

Technical Queue

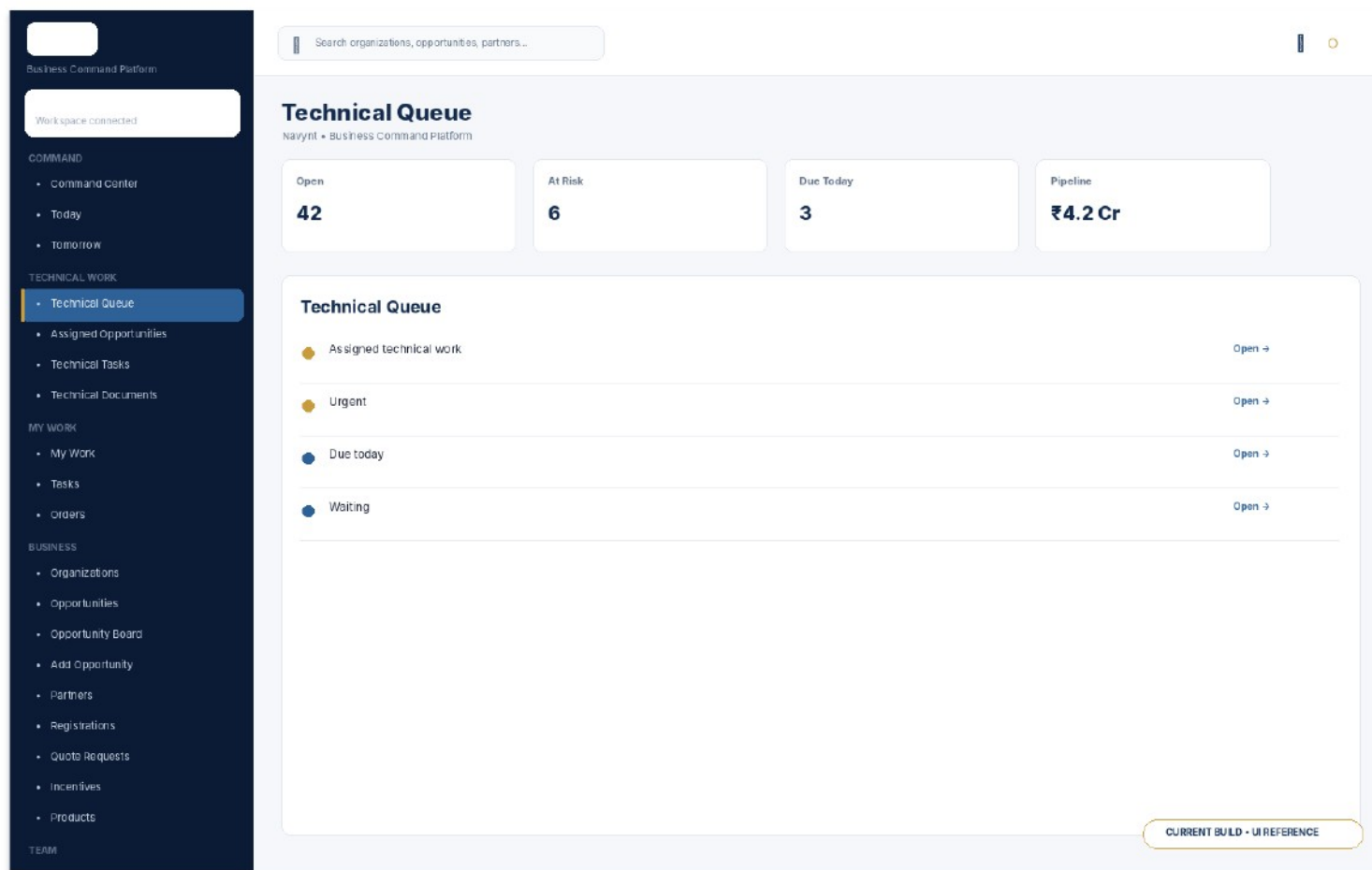
A technical-work queue for solution owners, with workload, stage, urgency and deal-status filters.

WHAT IT DOES

A technical-work queue for solution owners, with workload, stage, urgency and deal-status filters.

HOW TO USE IT

- Filter by Technical Owner, stage, deal status or urgency.
- Prioritize overdue and due-within-3-days items.
- Update technical progress so sales and management see the real deal state.



Opportunity Board

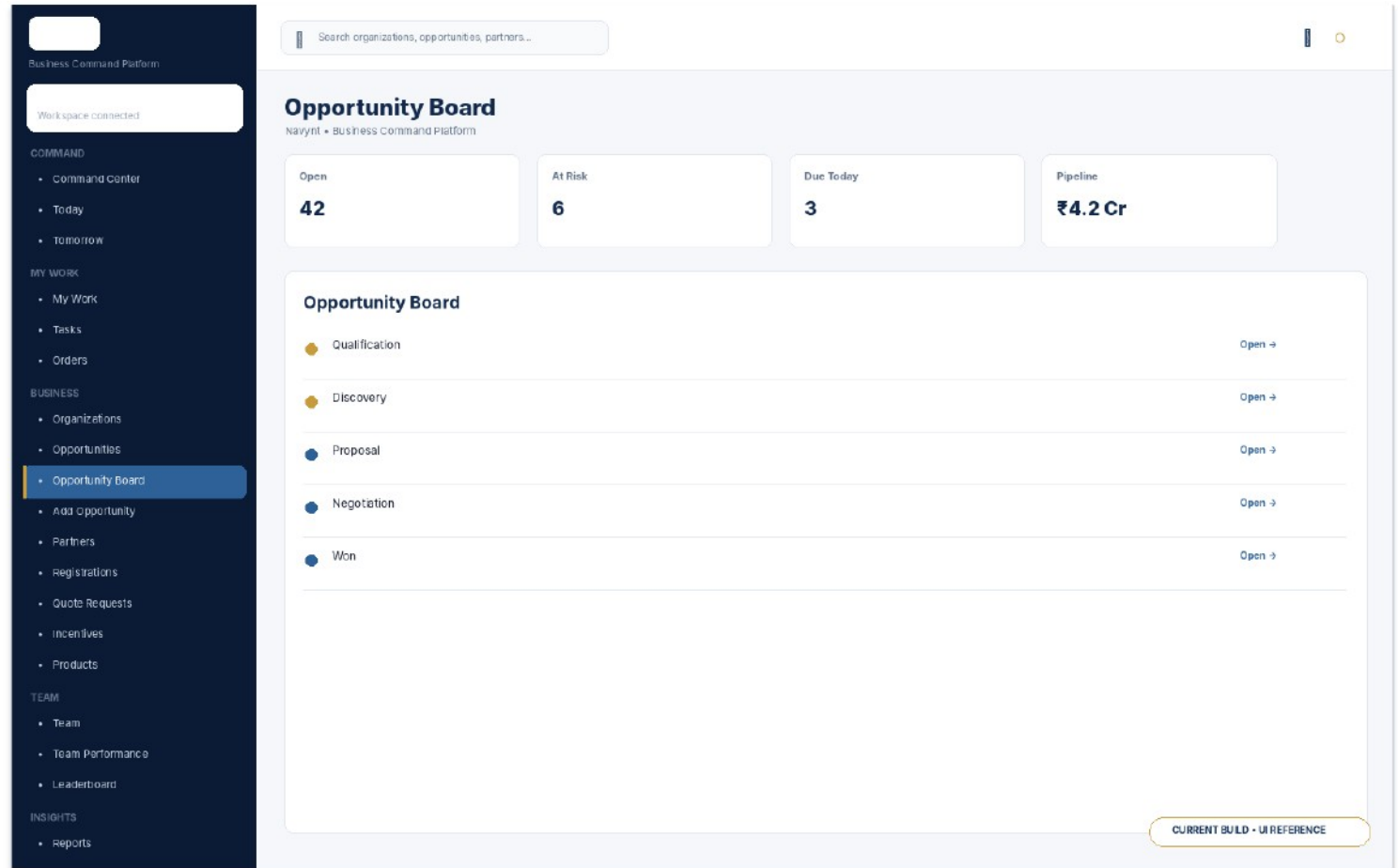
A visual opportunity board where deals can be moved through stages.

WHAT IT DOES

A visual opportunity board where deals can be moved through stages.

HOW TO USE IT

- Filter by Team Lead, Sales and Quarter.
- Drag an opportunity between stages when its status changes.
- Click a card to open and edit the opportunity.



Opportunities

The main opportunity register with filters for status, quarter, ownership, account, technical owner and hygiene.

WHAT IT DOES

The main opportunity register with filters for status, quarter, ownership, account, technical owner and hygiene.

HOW TO USE IT

- Use filters to narrow the working set.
- Use Hygiene Needs Attention to find records needing cleanup.
- Use Proactive/Reactive to understand opportunity origin.
- Use Add Deal to create a new opportunity.

The screenshot displays the 'Opportunities' section of the Navynt Business Command Platform. On the left is a dark blue sidebar with a navigation menu. The main content area features a search bar at the top, followed by a summary of opportunity counts and a list of filters. The sidebar menu includes sections for COMMAND, MY WORK, BUSINESS, TEAM, and INSIGHTS, with 'Opportunities' highlighted under the BUSINESS section. The main area shows 42 Open opportunities, 6 At Risk, 3 Due Today, and a Pipeline value of ₹4.2 Cr. Below this, a list of filters includes Active opportunity, At-risk opportunity, Next action due, and Recently updated, each with an 'Open' button. A 'CURRENT BUILD - UI REFERENCE' label is in the bottom right corner.

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Search organizations, opportunities, partners...

Opportunities

Navynt • Business Command Platform

Open	At Risk	Due Today	Pipeline
42	6	3	₹4.2 Cr

Opportunities

- Active opportunity [Open →](#)
- At-risk opportunity [Open →](#)
- Next action due [Open →](#)
- Recently updated [Open →](#)

CURRENT BUILD - UI REFERENCE

Add Opportunity

Create a new opportunity with system-generated Lead ID, ownership, territory/category, account and commercial details.

WHAT IT DOES

Create a new opportunity with system-generated Lead ID, ownership, territory/category, account and commercial details.

HOW TO USE IT

- Complete required fields marked with *.
- Technical Owner can be optional or auto-assigned where configured.
- Check account, territory/category and ownership before saving.
- Keep the opportunity updated as it progresses.

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Add Opportunity

Navynt • Business Command Platform

Open 42 At Risk 6 Due Today 3 Pipeline ₹4.2 Cr

Add Opportunity

Organization Open ->

Opportunity owner Open ->

Stage Open ->

Expected value Open ->

Expected close Open ->

CURRENT BUILD - UI REFERENCE

Owner View

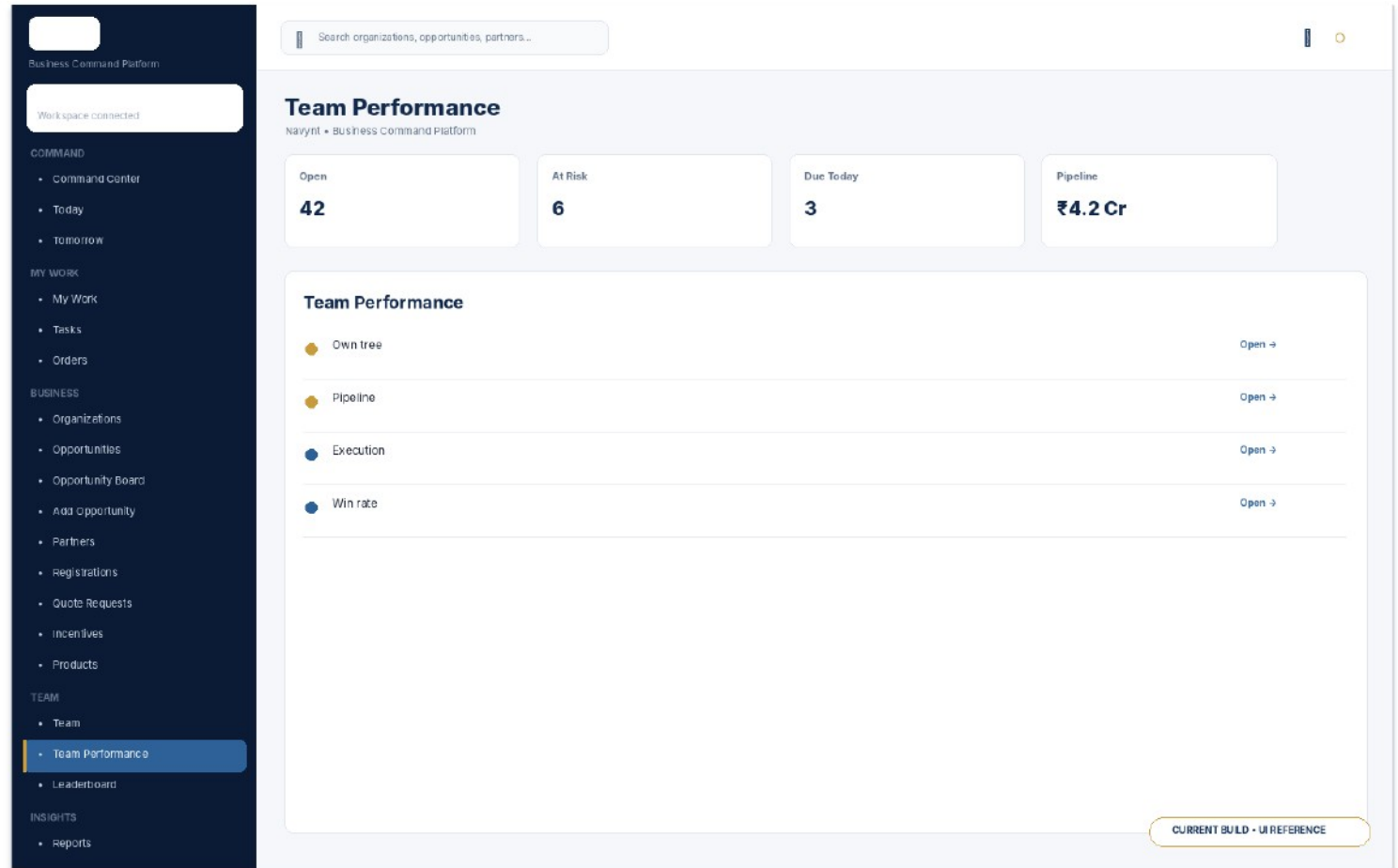
A focused view of an individual sales owner and the opportunities/work associated with that person.

WHAT IT DOES

A focused view of an individual sales owner and the opportunities/work associated with that person.

HOW TO USE IT

- Use it for one-to-one reviews and coaching.
- Review ownership, deal health and workload together.
- Correct issues in the underlying opportunity records.



Competitor Battlecards

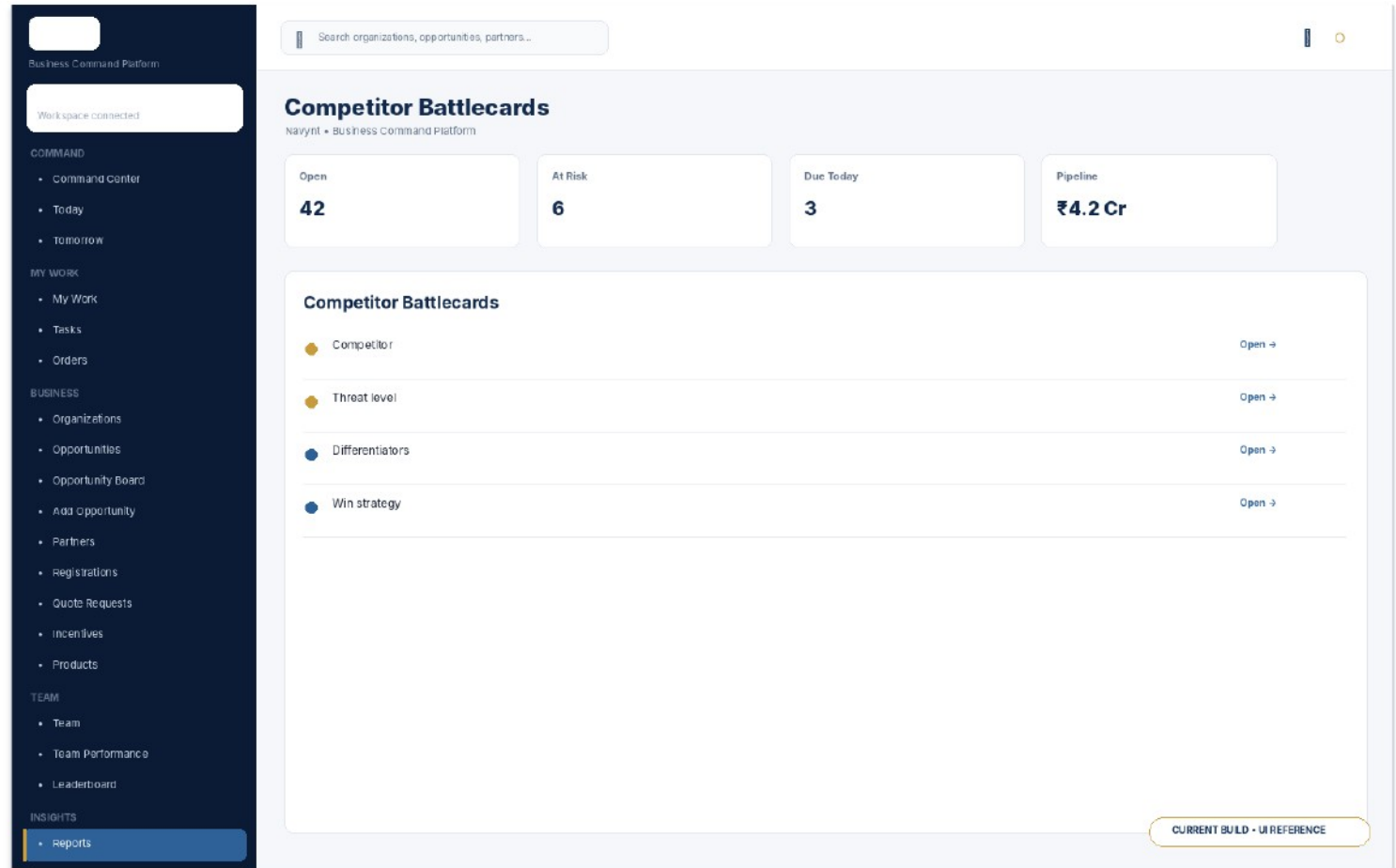
Capture competitor intelligence, threat level and win strategies in one place.

WHAT IT DOES

Capture competitor intelligence, threat level and win strategies in one place.

HOW TO USE IT

- Add a competitor and record the battlecard information.
- Use threat levels to prioritize competitive preparation.
- Review win/loss patterns to improve future deal strategy.



Deal Velocity Analytics

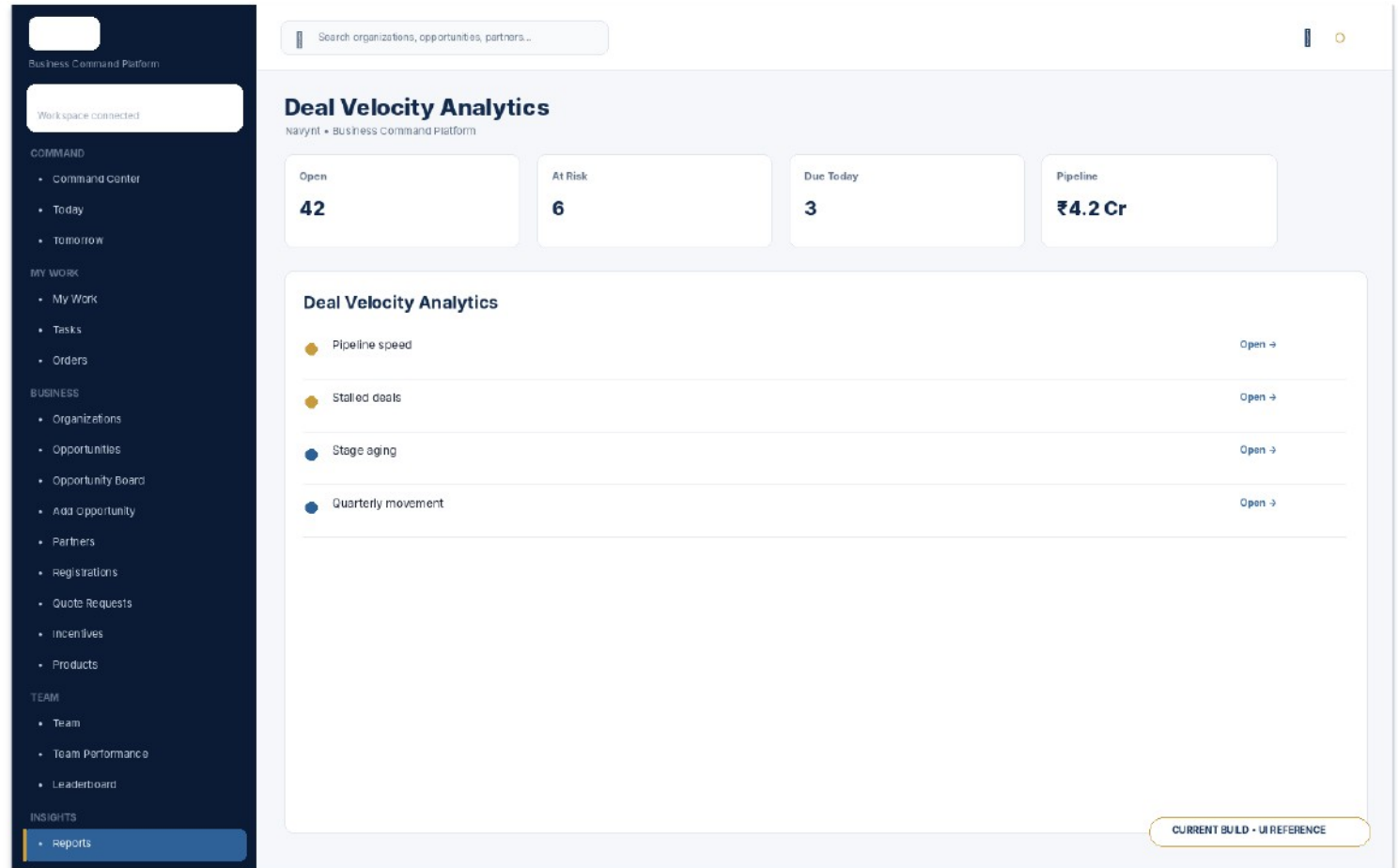
Measure speed and efficiency across the pipeline, including stalled deals and quarterly pipeline.

WHAT IT DOES

Measure speed and efficiency across the pipeline, including stalled deals and quarterly pipeline.

HOW TO USE IT

- Review pipeline by quarter.
- Focus on stalled opportunities with no recent update or at-risk signals.
- Use findings to drive review meetings and action plans.



Leaderboard

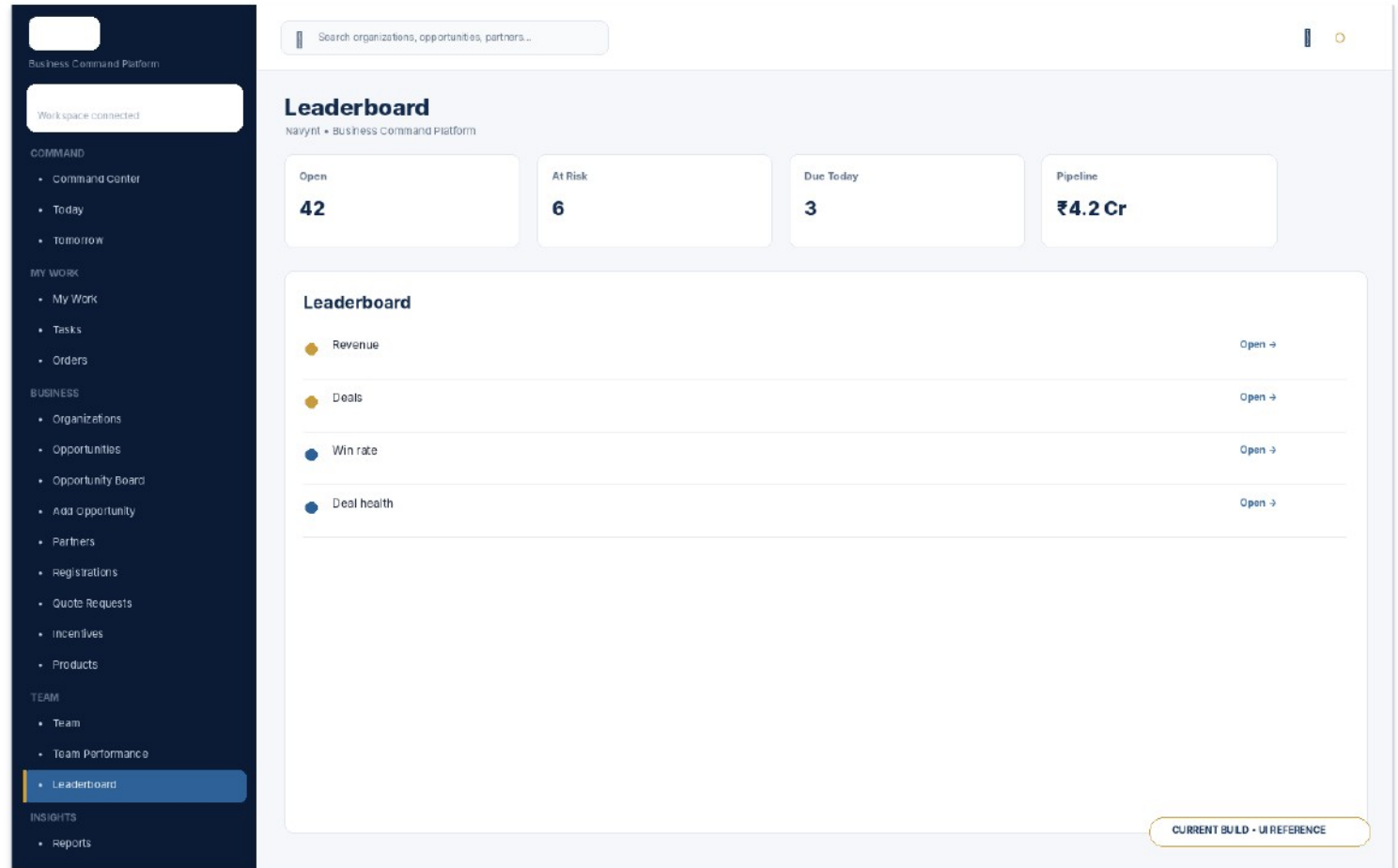
Performance rankings by revenue, deals, commit, win rate, partners and deal health.

WHAT IT DOES

Performance rankings by revenue, deals, commit, win rate, partners and deal health.

HOW TO USE IT

- Switch the metric that matters for the review.
- Use the leaderboard for transparent performance discussions.
- Pair ranking data with opportunity quality and deal health.



Organizations

Maintain customer/end-organization records and ownership mapping by territory/category, sector and tier.

WHAT IT DOES

Maintain customer/end-organization records and ownership mapping by territory/category, sector and tier.

HOW TO USE IT

- Filter organizations using the available business dimensions.
- Add an organization before creating opportunities against it.
- Use Register Deal where partner claim/registration is required.
- Use Import Excel for existing organization data.

The screenshot displays the Navynt Business Command Platform interface. On the left is a dark sidebar with a navigation menu. The main content area on the right is titled 'Organizations' and includes a search bar at the top. Below the search bar, there are four summary cards: 'Open' (42), 'At Risk' (6), 'Due Today' (3), and 'Pipeline' (₹4.2 Cr). A table below these cards lists organization types: 'Customer organization', 'Prospect', 'Partner-linked account', and 'Organization requiring attention', each with an 'Open' button and an arrow. The bottom right corner of the interface contains a label 'CURRENT BUILD - UI REFERENCE'.

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Search organizations, opportunities, partners...

Organizations

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Open	At Risk	Due Today	Pipeline
42	6	3	₹4.2 Cr

Organizations

Customer organization	Open →
Prospect	Open →
Partner-linked account	Open →
Organization requiring attention	Open →

CURRENT BUILD - UI REFERENCE

Partners

Maintain partner/channel organizations and their mapping to business territories, categories, tiers and owners.

WHAT IT DOES

Maintain partner/channel organizations and their mapping to business territories, categories, tiers and owners.

HOW TO USE IT

- Use Map from Organizations to identify likely channel organizations.
- Add or edit partner records as the relationship develops.
- Keep tier and ownership current for downstream workflows.

The screenshot displays the 'Partners' section of the Navynt Business Command Platform. The interface includes a dark blue sidebar with a navigation menu containing sections like COMMAND, MY WORK, BUSINESS, TEAM, and INSIGHTS. The 'Partners' item is highlighted. The main content area features a search bar at the top, followed by a 'Partners' header and a summary row with four cards: 'Open' (42), 'At Risk' (6), 'Due Today' (3), and 'Pipeline' (₹4.2 Cr). Below this is a table listing partner types: 'Active partner', 'Partner opportunity', 'Registration', and 'Enablement', each with an 'Open' link. A 'CURRENT BUILD - UI REFERENCE' label is in the bottom right corner.

Partners	
Active partner	Open →
Partner opportunity	Open →
Registration	Open →
Enablement	Open →

Deal Registrations

Manage partner claims on accounts and review conflicts before a registration is accepted.

WHAT IT DOES

Manage partner claims on accounts and review conflicts before a registration is accepted.

HOW TO USE IT

- Register a deal from the registration workflow.
- Review conflicting active registrations carefully.
- Approve or reject according to your channel rules.
- Keep linked account and partner accurate.

The screenshot displays the Navynt Business Command Platform interface. On the left is a dark blue sidebar with a navigation menu. The main content area is light blue and features a search bar at the top. Below the search bar, the 'Registrations' section is highlighted, showing a summary of registration counts and a table of registration statuses.

Registrations Summary:

Open	At Risk	Due Today	Pipeline
42	6	3	₹4.2 Cr

Registrations Table:

Status	Action
Pending registration	Open →
Approved	Open →
Rejected	Open →
Conflict review	Open →

Navigation Menu (Sidebar):

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Footer: CURRENT BUILD • UI REFERENCE

Quote Requests

Formal quotation requests for direct or partner-led business, with approval and deal linkage.

WHAT IT DOES

Formal quotation requests for direct or partner-led business, with approval and deal linkage.

HOW TO USE IT

- Submit requirements and commercial context.
- Review and approve requests according to authority.
- Approved requests can create or link a pipeline opportunity.
- Keep request status aligned with the quote process.

The screenshot displays the Navynt Business Command Platform interface. On the left is a dark sidebar with a navigation menu. The main content area is light blue and features a search bar at the top. Below the search bar, the 'Quote Requests' section is highlighted. It includes a summary row with four cards: 'Open' (42), 'At Risk' (6), 'Due Today' (3), and 'Pipeline' (₹4.2 Cr). Below this is a table with four rows: 'Open quote request', 'Awaiting approval', 'In progress', and 'Completed'. Each row has an 'Open →' link on the right. At the bottom right of the interface, there is a yellow button labeled 'CURRENT BUILD - UI REFERENCE'.

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Search organizations, opportunities, partners...

Quote Requests

Navynt • Business Command Platform

Open	At Risk	Due Today	Pipeline
42	6	3	₹4.2 Cr

Quote Requests

Open quote request	Open →
Awaiting approval	Open →
In progress	Open →
Completed	Open →

CURRENT BUILD - UI REFERENCE

Partner Incentives

Manage MDF, rebates and SPIFF requests through submission, review, approval/rejection and payment.

WHAT IT DOES

Manage MDF, rebates and SPIFF requests through submission, review, approval/rejection and payment.

HOW TO USE IT

- Create the request with complete justification and amounts.
- Review before approval.
- Track approved items through payment.
- Keep supporting documentation audit-ready.

The screenshot displays the Navynt Business Command Platform interface. On the left is a dark sidebar with a navigation menu. The main content area has a light blue header with a search bar and a title 'Incentives'. Below the header, there are four summary cards: 'Open' (42), 'At Risk' (6), 'Due Today' (3), and 'Pipeline' (₹4.2 Cr). A table below these cards lists incentive statuses: 'Submitted request', 'Awaiting approval', 'Approved', and 'Payment pending', each with an 'Open ->' link. A footer bar at the bottom right contains the text 'CURRENT BUILD - UI REFERENCE'.

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Search organizations, opportunities, partners...

Incentives

Navynt • Business Command Platform

Open	At Risk	Due Today	Pipeline
42	6	3	₹4.2 Cr

Incentives

Submitted request	Open ->
Awaiting approval	Open ->
Approved	Open ->
Payment pending	Open ->

CURRENT BUILD - UI REFERENCE

People & Access → Team Members

Manage departments, team members, technical owners, team-lead titles, territories and role permissions.

WHAT IT DOES

Manage departments, team members, technical owners, team-lead titles, territories and role permissions.

HOW TO USE IT

- Add people through the common team-member workflow.
- Select department and the appropriate access role.
- Maintain technical owners separately where needed.
- Review Role Permissions Reference before elevated access.

The screenshot displays the Navynt Business Command Platform interface. On the left is a dark blue sidebar with a navigation menu. The main content area is light blue and features a search bar at the top. Below the search bar, the 'Team Members' section is highlighted. It includes four summary cards: 'Open' (42), 'At Risk' (6), 'Due Today' (3), and 'Pipeline' (₹4.2 Cr). Below these cards is a table titled 'Team Members' with four rows: 'User', 'Department', 'System access role', and 'Reporting manager'. Each row has an 'Open →' link on the right. At the bottom right of the interface, there is a yellow button labeled 'CURRENT BUILD - UI REFERENCE'.

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Search organizations, opportunities, partners...

Team Members

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Open 42 At Risk 6 Due Today 3 Pipeline ₹4.2 Cr

Team Members

User	Open →
Department	Open →
System access role	Open →
Reporting manager	Open →

CURRENT BUILD - UI REFERENCE

Reports

Reporting for quarterly funnel, sales performance, product analysis, win/loss, partner performance and saved reports.

WHAT IT DOES

Reporting for quarterly funnel, sales performance, product analysis, win/loss, partner performance and saved reports.

HOW TO USE IT

- Choose the report that matches the business question.
- Use Saved Reports for repeat reviews.
- Use Report Builder for custom questions.
- Treat exported reports as business records.

The screenshot displays the 'Reports' section of the Navynt Business Command Platform. On the left is a dark blue sidebar with a navigation menu. The main content area has a light blue header with a search bar and a 'Reports' title. Below the header, there are four summary cards: 'Open' (42), 'At Risk' (6), 'Due Today' (3), and 'Pipeline' (₹4.2 Cr). A table below these cards lists four report types: 'Saved report', 'Pipeline report', 'Performance report', and 'Operational report', each with an 'Open' button and a right-pointing arrow. At the bottom right of the main area is a yellow button labeled 'CURRENT BUILD - UI REFERENCE'.

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Search organizations, opportunities, partners...

Reports

Navynt • Business Command Platform

Open	At Risk	Due Today	Pipeline
42	6	3	₹4.2 Cr

Reports

● Saved report	Open →
● Pipeline report	Open →
● Performance report	Open →
● Operational report	Open →

CURRENT BUILD - UI REFERENCE

Tasks

Manage reminders, follow-up tasks and activity notes connected to your work.

WHAT IT DOES

Manage reminders, follow-up tasks and activity notes connected to your work.

HOW TO USE IT

- Add tasks with clear owner and due date.
- Filter Open versus Done to stay focused.
- Use Follow-up Tasks for customer and internal commitments.
- Record meaningful notes for continuity.

The screenshot displays the 'Tasks' section of the Navynt Business Command Platform. On the left is a dark blue sidebar with a navigation menu. The main content area features a top search bar, a summary of task counts by status, and a list of individual tasks with their details and actions.

Navigation Menu (Left Sidebar):

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Main Content Area:

Search organizations, opportunities, partners...

Tasks

Navynt • Business Command Platform

Open	At Risk	Due Today	Pipeline
42	6	3	₹4.2 Cr

Tasks

Open task	Open →
Customer follow-up	Open →
Internal action	Open →
Waiting on	Open →

CURRENT BUILD • UI REFERENCE

Orders

Record purchase orders against Won opportunities and track Won deals still waiting for a PO.

WHAT IT DOES

Record purchase orders against Won opportunities and track Won deals still waiting for a PO.

HOW TO USE IT

- Review Purchase Order Pending regularly.
- Enter the PO once received rather than leaving a Won deal incomplete.
- Use status filters to reconcile order progress.

The screenshot displays the Navynt Business Command Platform interface. On the left is a dark sidebar with a navigation menu. The main content area is titled 'Orders' and shows a summary of order statuses and a list of individual orders.

Navigation Menu (Left Sidebar):

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Orders Section (Main Content):

Search organizations, opportunities, partners...

Orders
Navynt • Business Command Platform

Open	At Risk	Due Today	Pipeline
42	6	3	₹4.2 Cr

Orders List:

- Purchase Order Pending (Yellow dot) [Open →](#)
- Awaiting confirmation (Yellow dot) [Open →](#)
- In execution (Blue dot) [Open →](#)
- Completed (Blue dot) [Open →](#)

Footer: CURRENT BUILD • UI REFERENCE

Products

Maintain product categories and model master data used when recording purchase orders.

WHAT IT DOES

Maintain product categories and model master data used when recording purchase orders.

HOW TO USE IT

- Admins, Management and Technical Owners can maintain master data.
- Sales and Team Leads use values as read-only selections.
- Keep model names and categories consistent for reporting.

The screenshot displays the Navynt Business Command Platform interface. On the left is a dark blue sidebar with a navigation menu. The main content area is white with a search bar at the top. Below the search bar, the 'Products' section is highlighted, showing four summary cards: 'Open' (42), 'At Risk' (6), 'Due Today' (3), and 'Pipeline' (₹4.2 Cr). Below these cards is a table with four rows: 'Product family', 'Model', 'Category', and 'Permitted actions'. Each row has an 'Open' link with a right arrow. At the bottom right of the main area is a button labeled 'CURRENT BUILD - UI REFERENCE'.

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Search organizations, opportunities, partners...

Products

Navynt • Business Command Platform

Open: 42, At Risk: 6, Due Today: 3, Pipeline: ₹4.2 Cr

Products	
Product family	Open →
Model	Open →
Category	Open →
Permitted actions	Open →

CURRENT BUILD - UI REFERENCE

Add Purchase Order

Record a customer PO against a Won opportunity, including dates, payment terms, billing and delivery details.

WHAT IT DOES

Record a customer PO against a Won opportunity, including dates, payment terms, billing and delivery details.

HOW TO USE IT

- Sales Order Number is generated automatically and becomes permanent after save.
- Enter client PO number and dates carefully.
- Add the PO copy as a shared Drive, SharePoint or approved URL.
- Verify billing and consignee/delivery details before saving.

The screenshot displays the Navynt Business Command Platform interface. On the left is a dark sidebar with a navigation menu. The main content area is light blue and features a search bar at the top. Below the search bar, the 'Orders' section is highlighted, showing a summary of order counts and a table of order statuses.

Navigation Menu (Left Sidebar):

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Orders Section (Main Content):

Search organizations, opportunities, partners...

Orders
Navynt • Business Command Platform

Open	At Risk	Due Today	Pipeline
42	6	3	₹4.2 Cr

Orders Table:

Status	Action
Purchase Order Pending	Open →
Awaiting confirmation	Open →
In execution	Open →
Completed	Open →

CURRENT BUILD • UI REFERENCE

Workflows

Configure rule-based alerts for operational events such as stalled deals and upcoming proposal due dates.

WHAT IT DOES

Configure rule-based alerts for operational events such as stalled deals and upcoming proposal due dates.

HOW TO USE IT

- Rules are off by default—review before enabling.
- Create rules with a clear owner and action.
- Test alert behavior before relying on it operationally.

The screenshot displays the 'Workflows' section of the Navynt Business Command Platform. The interface includes a dark sidebar with navigation links categorized under COMMAND, MY WORK, BUSINESS, TEAM, and INSIGHTS. The main content area features a search bar at the top and a summary section with four cards: 'Open' (42), 'At Risk' (6), 'Due Today' (3), and 'Pipeline' (₹4.2 Cr). Below this is a table listing workflow types: 'Active workflow', 'Stalled workflow', 'Rule', and 'Recent run', each with an 'Open' link. A 'CURRENT BUILD - UI REFERENCE' button is located at the bottom right.

Workflow Type	Action
Active workflow	Open →
Stalled workflow	Open →
Rule	Open →
Recent run	Open →

Documents

Organize links shared against an opportunity by requirements/updates, technical compliance and proposal documents.

WHAT IT DOES

Organize links shared against an opportunity by requirements/updates, technical compliance and proposal documents.

HOW TO USE IT

- Add a meaningful link name and shared URL.
- Keep documents in the correct stage/category.
- Use the opportunity document area as the index; files may live in Drive, SharePoint or another approved location.

The screenshot displays the Navynt Business Command Platform interface. On the left is a dark blue sidebar with a navigation menu. The main content area is white and features a search bar at the top. Below the search bar, the 'Documents' section is highlighted, showing a summary of document counts across different stages: Open (42), At Risk (6), Due Today (3), and Pipeline (₹4.2 Cr). Below this summary is a table listing individual documents with their categories and 'Open' links.

Navigation Menu (Left Sidebar):

- Workspace connected
- COMMAND
 - Command Center
 - Today
 - Tomorrow
- MY WORK
 - My Work
 - Tasks
 - Orders
- BUSINESS
 - Organizations
 - Opportunities
 - Opportunity Board
 - Add Opportunity
 - Partners
 - Registrations
 - Quote Requests
 - Incentives
 - Products
- TEAM
 - Team
 - Team Performance
 - Leaderboard
- INSIGHTS
 - Reports

Documents Section (Main Content):

Search organizations, opportunities, partners...

Documents

Navynt • Business Command Platform

Open	At Risk	Due Today	Pipeline
42	6	3	₹4.2 Cr

Documents	
Proposal	Open →
Quotation	Open →
Technical document	Open →
Compliance evidence	Open →

CURRENT BUILD • UI REFERENCE

Administration → Workspace → Organization Hierarchy

Define reporting layers and reporting lines so the organization structure is visible inside Navynt.

WHAT IT DOES

Define reporting layers and reporting lines so the organization structure is visible inside Navynt.

HOW TO USE IT

- Build departments first.
- Place people into the correct hierarchy layer.
- Define who reports to whom.
- Keep the hierarchy aligned with the real operating structure.

The screenshot displays the Navynt Business Command Platform interface. On the left is a dark sidebar with a menu organized into sections: COMMAND (Command Center, Today, Tomorrow), MY WORK (My Work, Tasks, Orders), BUSINESS (Organizations, Opportunities, Opportunity Board, Add Opportunity, Partners, Registrations, Quote Requests, Incentives, Products), TEAM (Team, Team Performance, Leaderboard), and INSIGHTS (Reports). The main content area has a search bar at the top. Below it, a 'General' section for 'Navynt • Business Command Platform' features four summary cards: 'Open' (42), 'At Risk' (6), 'Due Today' (3), and 'Pipeline' (₹4.2 Cr). A table below these cards lists configuration items: 'Workspace Identity', 'Fiscal year', 'Organization hierarchy', and 'Platform configuration', each with an 'Open →' link. A 'CURRENT BUILD • UI REFERENCE' button is located at the bottom right.

Import / Export

Move opportunity data in and out of Navynt using Excel-compatible files.

WHAT IT DOES

Move opportunity data in and out of Navynt using Excel-compatible files.

HOW TO USE IT

- Import files with matching column headers.
- Use export for backup or analysis.
- Validate imported records after the operation.
- Do not use imports to bypass normal governance.

The screenshot displays the 'Import / Export' section of the Navynt Business Command Platform. On the left is a dark blue sidebar with a navigation menu. The main content area has a light blue header with a search bar and a title. Below the header are four summary cards: 'Open' (42), 'At Risk' (6), 'Due Today' (3), and 'Pipeline' (₹4.2 Cr). The main section contains a table with four rows: 'Import file', 'Validation', 'Export', and 'Last run', each with an 'Open ->' link. A footer bar at the bottom right contains the text 'CURRENT BUILD - UI REFERENCE'.

Business Command Platform

Workspace connected

COMMAND

- Command Center
- Today
- Tomorrow

MY WORK

- My Work
- Tasks
- Orders

BUSINESS

- Organizations
- Opportunities
- Opportunity Board
- Add Opportunity
- Partners
- Registrations
- Quote Requests
- Incentives
- Products

TEAM

- Team
- Team Performance
- Leaderboard

INSIGHTS

- Reports

Search organizations, opportunities, partners...

Import / Export

Navynt • Business Command Platform

Open	At Risk	Due Today	Pipeline
42	6	3	₹4.2 Cr

Import / Export

Import file	Open ->
Validation	Open ->
Export	Open ->
Last run	Open ->

CURRENT BUILD - UI REFERENCE

Audit Log

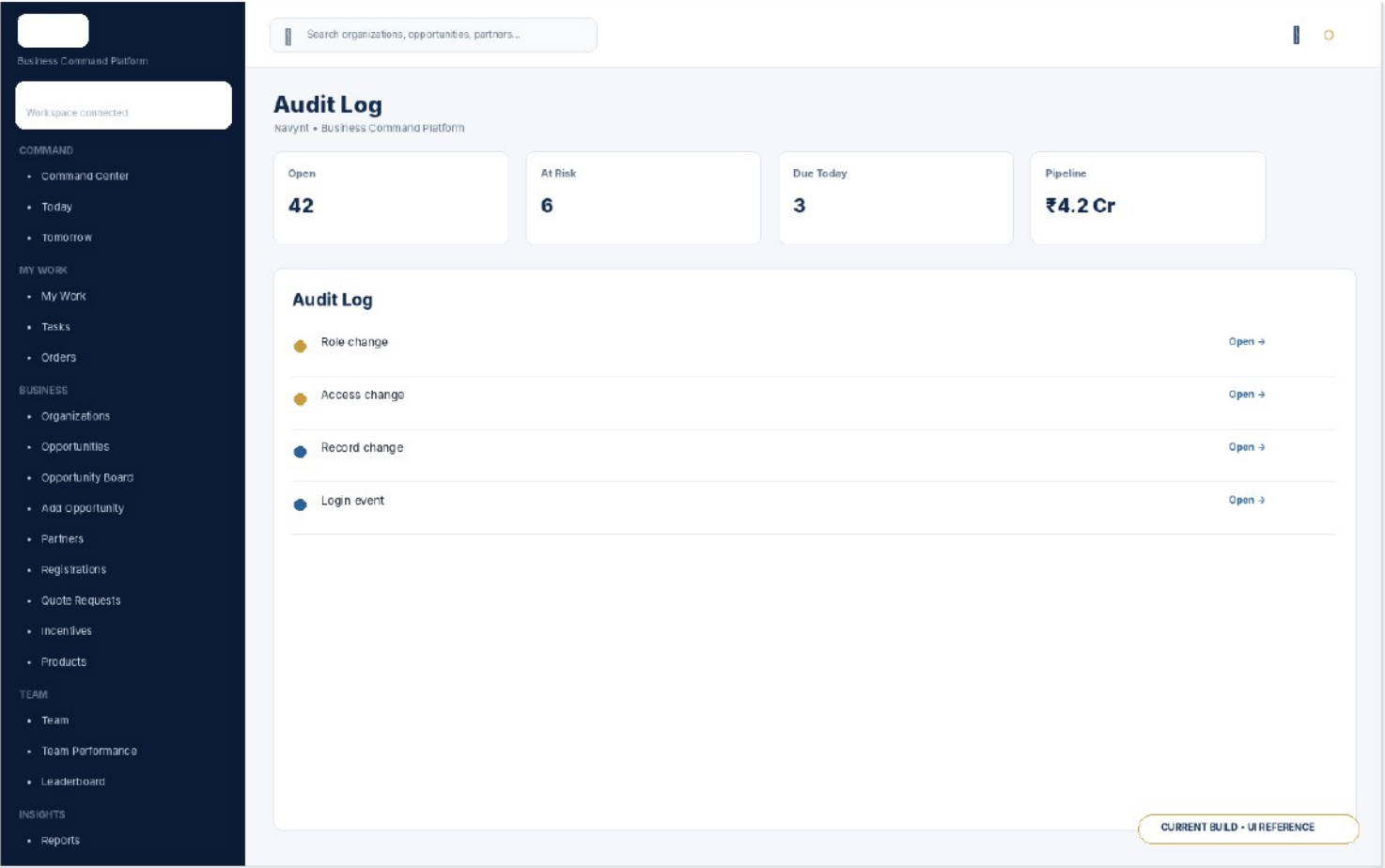
A governance record of sensitive account, team and data actions.

WHAT IT DOES

A governance record of sensitive account, team and data actions.

HOW TO USE IT

- Refresh for the latest activity.
- Export CSV when an audit needs a portable record.
- Review role changes, team changes, reassignment and credential actions carefully.



System Operations → Storage & Health

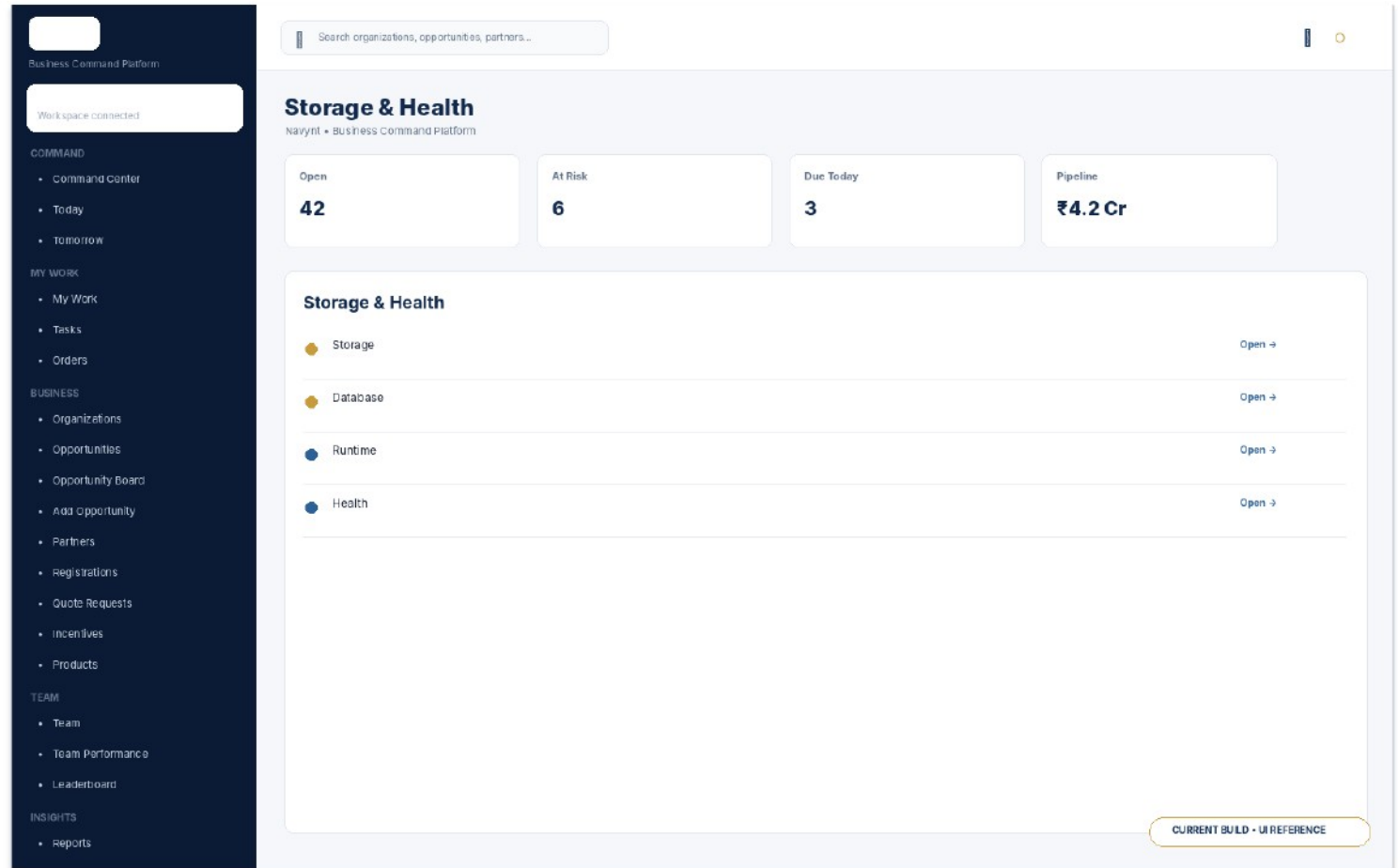
Administrative health and storage controls for operational validation and controlled platform operations.

WHAT IT DOES

Administrative health and storage controls for operational validation and controlled platform operations.

HOW TO USE IT

- This is an administrator/operations area.
- Use it for platform health and controlled operational changes.
- Restrict access to authorized administrators.



Integrations → API & Webhooks

Manage read-only API access and outbound event notifications for integrations.

WHAT IT DOES

Manage read-only API access and outbound event notifications for integrations.

HOW TO USE IT

- Create an API key only when an integration needs it.
- Grant minimum required scopes.
- Use webhooks for external event notifications.
- Treat API keys as secrets and rotate/revoke them when needed.

The screenshot displays the 'API & Webhooks' management interface within the Navynt Business Command Platform. On the left is a dark sidebar with a navigation menu categorized into COMMAND, MY WORK, BUSINESS, TEAM, and INSIGHTS. The main content area features a search bar at the top and a summary section with four metrics: Open (42), At Risk (6), Due Today (3), and Pipeline (₹4.2 Cr). Below this is a table listing API keys, Scopes, Webhooks, and Deliveries, each with an 'Open' link. A footer bar at the bottom right indicates 'CURRENT BUILD - UI REFERENCE'.

Category	Value
Open	42
At Risk	6
Due Today	3
Pipeline	₹4.2 Cr

Item	Action
API key	Open →
Scope	Open →
Webhook	Open →
Delivery	Open →

Partner Tiers

Define partner-program tiers, discount rates, MDF eligibility and benefits, then assign partners to tiers.

WHAT IT DOES

Define partner-program tiers, discount rates, MDF eligibility and benefits, then assign partners to tiers.

HOW TO USE IT

- Create or update tier definitions centrally.
- Resolve legacy free-text tier values.
- Assign partners from Partners.
- Keep benefits synchronized with the approved partner program.

The screenshot displays the Navynt Business Command Platform interface. On the left is a dark blue sidebar with a navigation menu. The main content area is white with a search bar at the top. Below the search bar, the 'Partner Tiers' section is highlighted. It features four summary cards: 'Open' (42), 'At Risk' (6), 'Due Today' (3), and 'Pipeline' (₹4.2 Cr). Below these cards is a table titled 'Partner Tiers' with four rows: 'Tier', 'Eligibility', 'Benefit', and 'Partner count'. Each row has an 'Open' button with a right arrow. At the bottom right of the interface is a yellow button labeled 'CURRENT BUILD - UI REFERENCE'.

Business Command Platform

Workspace connected

COMMAND

- Command Center
- Today
- Tomorrow

MY WORK

- My Work
- Tasks
- Orders

BUSINESS

- Organizations
- Opportunities
- Opportunity Board
- Add Opportunity
- Partners
- Registrations
- Quote Requests
- Incentives
- Products

TEAM

- Team
- Team Performance
- Leaderboard

INSIGHTS

- Reports

Search organizations, opportunities, partners...

Partner Tiers

Navynt • Business Command Platform

Open	At Risk	Due Today	Pipeline
42	6	3	₹4.2 Cr

Partner Tiers

Tier	Open →
Eligibility	Open →
Benefit	Open →
Partner count	Open →

CURRENT BUILD - UI REFERENCE

Partner Enablement

Publish training kits, certifications and sales resources visible through the partner portal.

WHAT IT DOES

Publish training kits, certifications and sales resources visible through the partner portal.

HOW TO USE IT

- Create resources with clear titles and audience.
- Maintain status and update dates.
- Use enablement content to reduce repetitive partner support requests.

The screenshot displays the 'Partner Enablement' section of the Navynt Business Command Platform. On the left is a dark blue sidebar with a navigation menu. The main content area features a search bar at the top, followed by a summary section with four cards: 'Open' (42), 'At Risk' (6), 'Due Today' (3), and 'Pipeline' (₹4.2 Cr). Below this is a table titled 'Partner Enablement' with four rows: 'Resource', 'Audience', 'Review date', and 'Published'. Each row has an 'Open' link with a right-pointing arrow. At the bottom right of the main area is a button labeled 'CURRENT BUILD - UI REFERENCE'.

Business Command Platform

Workspace connected

COMMAND

- Command Center
- Today
- Tomorrow

MY WORK

- My Work
- Tasks
- Orders

BUSINESS

- Organizations
- Opportunities
- Opportunity Board
- Add Opportunity
- Partners
- Registrations
- Quote Requests
- Incentives
- Products

TEAM

- Team
- Team Performance
- Leaderboard

INSIGHTS

- Reports

Search organizations, opportunities, partners...

Partner Enablement

Navynt • Business Command Platform

Open	At Risk	Due Today	Pipeline
42	6	3	₹4.2 Cr

Partner Enablement

Resource	Open →
Audience	Open →
Review date	Open →
Published	Open →

CURRENT BUILD - UI REFERENCE

Custom Fields

Add extra fields to Deals, Organizations or Partners without changing the core record structure.

WHAT IT DOES

Add extra fields to Deals, Organizations or Partners without changing the core record structure.

HOW TO USE IT

- Choose the record type first.
- Give each field a clear business label.
- Set type and required status deliberately.
- Use custom fields only when they improve process or reporting.

The screenshot displays the Navynt Business Command Platform interface. On the left is a dark blue sidebar with a navigation menu categorized into COMMAND, MY WORK, BUSINESS, TEAM, and INSIGHTS. The main content area has a light blue header with a search bar and a title 'Custom Fields' for the 'Navynt • Business Command Platform'. Below the header, there are four summary cards: 'Open' (42), 'At Risk' (6), 'Due Today' (3), and 'Pipeline' (₹4.2 Cr). The main section is titled 'Custom Fields' and contains a list of four fields: 'Opportunity field', 'Organization field', 'Required field', and 'Reporting field'. Each field has a colored dot icon and an 'Open →' link. At the bottom right, there is a button labeled 'CURRENT BUILD • UI REFERENCE'.

Custom Modules

Create new record types such as Assets, Renewals or Vendors with their own forms and lists.

WHAT IT DOES

Create new record types such as Assets, Renewals or Vendors with their own forms and lists.

HOW TO USE IT

- Create a module when a business object needs its own lifecycle.
- Define fields and list behavior carefully.
- Use business-friendly module names.

The screenshot displays the Navynt Business Command Platform interface. On the left is a dark blue sidebar with a navigation menu. The main content area is light blue and features a search bar at the top. Below the search bar, the 'Custom Modules' section is active, showing a summary of metrics and a list of modules.

Navigation Menu (Sidebar):

- Business Command Platform
- Workspace connected
- COMMAND
 - Command Center
 - Today
 - Tomorrow
- MY WORK
 - My Work
 - Tasks
 - Orders
- BUSINESS
 - Organizations
 - Opportunities
 - Opportunity Board
 - Add Opportunity
 - Partners
 - Registrations
 - Quote Requests
 - Incentives
 - Products
- TEAM
 - Team
 - Team Performance
 - Leaderboard
- INSIGHTS
 - Reports

Custom Modules Summary:

Open	At Risk	Due Today	Pipeline
42	6	3	₹4.2 Cr

Custom Modules List:

Module	Action
Module	Open →
Fields	Open →
Record type	Open →
Permissions	Open →

Footer: CURRENT BUILD • UI REFERENCE

Custom Module Records

Work inside a custom record type after it has been created by an administrator.

WHAT IT DOES

Work inside a custom record type after it has been created by an administrator.

HOW TO USE IT

- Use the module's own list and form to create and maintain records.
- Follow required fields defined for that module.
- Use custom modules for business objects that do not naturally belong elsewhere.

The screenshot displays the Navynt Business Command Platform interface. On the left is a dark blue sidebar with a navigation menu. The main content area is white with a search bar at the top. Below the search bar, the 'Custom Modules' section is highlighted. It features four summary cards: 'Open' (42), 'At Risk' (6), 'Due Today' (3), and 'Pipeline' (₹4.2 Cr). Below these cards is a table listing custom modules: Module, Fields, Record type, and Permissions. Each row has an 'Open' link with a right arrow. At the bottom right of the main area is a yellow button labeled 'CURRENT BUILD - UI REFERENCE'.

Business Command Platform

Workspace connected

COMMAND

- Command Center
- Today
- Tomorrow

MY WORK

- My Work
- Tasks
- Orders

BUSINESS

- Organizations
- Opportunities
- Opportunity Board
- Add Opportunity
- Partners
- Registrations
- Quote Requests
- Incentives
- Products

TEAM

- Team
- Team Performance
- Leaderboard

INSIGHTS

- Reports

Search organizations, opportunities, partners...

Custom Modules

Navynt • Business Command Platform

Open	At Risk	Due Today	Pipeline
42	6	3	₹4.2 Cr

Custom Modules

Module	Open →
Fields	Open →
Record type	Open →
Permissions	Open →

CURRENT BUILD - UI REFERENCE

Field Permissions

Control which roles can view or edit sensitive fields on Deals, Organizations and Partners.

WHAT IT DOES

Control which roles can view or edit sensitive fields on Deals, Organizations and Partners.

HOW TO USE IT

- Review sensitive fields individually.
- Use least-privilege access.
- Test representative roles after changes.
- Document why a field is restricted.

The screenshot displays the 'Field Permissions' configuration page within the Navynt Business Command Platform. The interface features a dark blue sidebar on the left with a navigation menu categorized into COMMAND, MY WORK, BUSINESS, TEAM, and INSIGHTS. The main content area has a light blue header with a search bar and a title 'Field Permissions' with a subtitle 'Navynt • Business Command Platform'. Below the header, there are four summary cards: 'Open' (42), 'At Risk' (6), 'Due Today' (3), and 'Pipeline' (₹4.2 Cr). The main section is titled 'Field Permissions' and contains a table with four rows: 'Sensitive field', 'View access', 'Edit access', and 'Scope'. Each row has a colored dot icon and an 'Open →' link. At the bottom right, there is a yellow button labeled 'CURRENT BUILD • UI REFERENCE'.

Field	Count
Open	42
At Risk	6
Due Today	3
Pipeline	₹4.2 Cr

Field	Action
Sensitive field	Open →
View access	Open →
Edit access	Open →
Scope	Open →

Approval Rules

Configure sequential approvals for deal registrations, incentives and large opportunities.

WHAT IT DOES

Configure sequential approvals for deal registrations, incentives and large opportunities.

HOW TO USE IT

- Define who approves and in what sequence.
- Keep thresholds and approval ownership explicit.
- Test the rule with a representative record before production use.

The screenshot displays the Navynt Business Command Platform interface. On the left is a dark sidebar with a navigation menu. The main content area is titled 'Approval Rules' and shows a summary of rule counts and a list of configured rules.

Navigation Menu (Left Sidebar):

- Workspace connected
- COMMAND
 - Command Center
 - Today
 - Tomorrow
- MY WORK
 - My Work
 - Tasks
 - Orders
- BUSINESS
 - Organizations
 - Opportunities
 - Opportunity Board
 - Add Opportunity
 - Partners
 - Registrations
 - Quote Requests
 - Incentives
 - Products
- TEAM
 - Team
 - Team Performance
 - Leaderboard
- INSIGHTS
 - Reports

Approval Rules Summary (Top Right):

Open	At Risk	Due Today	Pipeline
42	6	3	₹4.2 Cr

Approval Rules List (Main Content):

Rule Name	Action
Threshold	Open →
Approver	Open →
Sequence	Open →
Active	Open →

Footer: CURRENT BUILD • UI REFERENCE

Legal & Compliance

Review current Navynt legal documents, DPA status and acceptance history for the workspace.

WHAT IT DOES

Review current Navynt legal documents, DPA status and acceptance history for the workspace.

HOW TO USE IT

- Review currently published documents.
- Confirm required acceptance status for the workspace.
- Use acceptance history for governance and customer/compliance reviews.

The screenshot displays the 'Legal & Compliance' section of the Navynt Business Command Platform. On the left is a dark sidebar with a navigation menu. The main content area features a search bar at the top, followed by four summary cards: 'Open' (42), 'At Risk' (6), 'Due Today' (3), and 'Pipeline' (₹4.2 Cr). Below these is a table with four rows: 'Published document', 'Acceptance', 'Version', and 'Status', each with an 'Open' link and a right-pointing arrow. A footer bar at the bottom right contains the text 'CURRENT BUILD - UI REFERENCE'.

Business Command Platform

Workspace connected

COMMAND

- Command Center
- Today
- Tomorrow

MY WORK

- My Work
- Tasks
- Orders

BUSINESS

- Organizations
- Opportunities
- Opportunity Board
- Add Opportunity
- Partners
- Registrations
- Quote Requests
- Incentives
- Products

TEAM

- Team
- Team Performance
- Leaderboard

INSIGHTS

- Reports

Search organizations, opportunities, partners...

Legal & Compliance

Navynt • Business Command Platform

Open	At Risk	Due Today	Pipeline
42	6	3	₹4.2 Cr

Legal & Compliance	
Published document	Open →
Acceptance	Open →
Version	Open →
Status	Open →

CURRENT BUILD - UI REFERENCE

Navynt is most useful when the records stay current.

The operating habit to build

- Start the day in Command / Today.
- Keep Opportunities, ownership and next actions current.
- Use Work and Technical Owner Queue to manage commitments.
- Close the loop with documents, quote requests, orders and tasks.
- Use Insights, Velocity and Leaderboard for management review.
- Let administrators control access, approvals, workflows and governance.

When the team follows the same operating rhythm, Navynt becomes the business command layer—not just a database.

THE CURRENT NAVIGATION

The supplied build uses bundles that mirror how people actually operate Navynt.

Navynt visual system

Navy #0B1B36 • Primary #16345C • Gold #C89B3C • Workspace #F5F7FA

Current side menu — exact operating structure

This is the navigation hierarchy implemented in the current supplied build.

Bundle	Submenus	Typical visibility
Command	Command Center • Today • Tomorrow	All users
Technical Work	Technical Queue • Assigned Opportunities • Technical Tasks • Technical Documents	Technical scope
My Work	My Work • Tasks • Orders	All users / module-aware
Business	Organizations • Opportunities • Opportunity Board • Add Opportunity • Partners • Regi	Permission / module-aware
Team	Team • Team Performance • Leaderboard	Team / management scope
Insights	Reports • Dashboards	Scope-aware
Operations	Workflows • Documents	Workflow admin; Documents permission-aware
Administration	Workspace • People & Access • Business Setup • Automation & Data • Security & Com	Authorized users
Account	Help & Support • Profile • password/MFA/sync/logout	All users

Design principle

Administration is collapsed. Technical Work is conditional. Ordinary business work stays out of Administration.

Why your menu can look different

Navynt combines role, hierarchy, permissions, module access and data scope.

Layer	Controls	Example
Role	Broad responsibility model	Admin / Management / Team Lead / Standard User / Technical Owner
Hierarchy	Reporting and organizational scope	Team Lead sees own tree rather than peer trees
Permission	Allowed actions	View Products vs Edit Products
Data scope	Which records are visible	Own records / team / organization
Module access	Optional business areas	Partners / Products / Documents / Technical Work

Important

Hidden navigation improves usability; direct links and APIs must still be protected by server-side authorization.

Team Lead — expected visibility

The Team Lead experience is narrower than administration and peer-management views.

- Team shows self + permitted reporting tree + required reporting-manager context.
- Team Performance is limited to the Team Lead's own tree; peer Team Lead names/trees are not exposed merely because they share the role.
- Role Permissions, Departments, Territories and Titles are administrative concepts and are hidden unless the user has the relevant management access.
- Products is visible only when Products rights are granted; edit/delete actions remain separate.
- Technical Owner KRA is not ordinary Team Lead navigation.
- Legal & Compliance remains permission-controlled.

User-friendly rule

The menu should show what the user is responsible for, not configuration they cannot operate.

Why this matters

Less navigation noise means faster adoption and fewer access-related mistakes.

Technical Owner — expected visibility

Technical Work is a dedicated work shelf, not a second CRM.

- Technical Queue is the starting point for assigned technical workload.
- Assigned Opportunities connect technical contribution to the commercial opportunity.
- Technical Tasks and Technical Documents keep technical commitments and evidence organized.
- Technical Owner access does not automatically grant Products administration, partner administration or commercial approval rights.
- Commercial records remain under Business; technical work connects to them.

Industry-neutral

Applications, engineering, solutions, architecture, delivery and technical services can use the same Technical Work structure.

Access note

Technical Owner KRA appears only when the appropriate Technical Work capability is present.

Products — rights should be explicit

Product visibility and actions should not be inferred from job title alone.

Action	What it means	Typical control
View	Can see the product master	Products permission
Add	Can create a product	Products + create/edit
Edit	Can change product information	Products + edit
Delete	Can remove a product	Products + delete / policy
Use in orders	Can select products during order work	Order + product scope

Good governance

Keep Product master changes restricted to the people who own product data. Ordinary users can still use products in permitted workflows.

Administration — one place for governance

Administration bundle	Contains
Workspace	General • Branding • Fiscal Year • Organization Hierarchy
People & Access	Team Members • Field Permissions
Business Setup	Custom Fields • Custom Modules • Approval Rules • Partner Tiers • Partner Enablement
Automation & Data	Import / Export • Audit Log
Security & Compliance	Security Policy • SSO • Legal & Compliance
Integrations	API & Webhooks

Security note

Management does not automatically receive tenant-security administration. Administrative access should be deliberate and least-privilege.

Global Search, Notifications & Profile

Small utilities that make everyday work faster.

- Global Search finds organizations, opportunities, partners and tasks without opening every module.
- Search results still respect your record scope.
- Notifications point you to an attention item; the underlying record remains the source of truth.
- Profile contains personal account actions such as password, Two-Factor Auth and connected services.
- Calendar Sync and Mailbox Sync are personal connections, not tenant-wide configuration.

Good habit

Search is a shortcut — never treat it as a way around permissions.

Account security

Never share credentials, MFA codes, API keys or session information.

A recommended daily operating rhythm

Navynt becomes powerful when the source records stay current.

1

COMMAND

See what matters

2

TODAY

Execute commitments

3

MY WORK

Maintain ownership

4

TOMORROW

Prepare next day

5

INSIGHTS

Review trends

Operating principle

Keep Organizations, Opportunities, ownership, next actions and supporting documents current. The rest of Navynt becomes dramatically more useful.

Quick reference — where should I go?

I want to...	Go to...
See what matters	Command → Command Center
Execute today's commitments	Command → Today
Prepare upcoming work	Command → Tomorrow
See my assigned work	My Work
Manage tasks / follow-ups	My Work → Tasks
Track purchase orders	My Work → Orders
Maintain organizations	Business → Organizations
Run pipeline	Business → Opportunities
See visual pipeline movement	Business → Opportunity Board
Create a new opportunity	Business → Add Opportunity
Work with partners	Business → Partners
Manage registrations / quotes / incentives	Business → Registrations / Quote Requests / Incentives
Manage products	Business → Products
Work with my team	Team → Team
Review performance	Team → Team Performance / Leaderboard
Analyze performance	Insights → Reports / Dashboards
Run workflows / manage documents	Operations → Workflows / Documents
Manage people and access	Administration → People & Access
Configure business rules	Administration → Business Setup
Manage integrations	Administration → Integrations
Review security / legal	Administration → Security & Compliance

UPDATED SINCE THE LAST GUIDE

What's New in Navynt

New capability delivered after the previous edition of this guide. Everything below is additive — nothing described earlier in this guide has been removed.

- A full buy-side operations chain: Vendors → Procurement Requests → Vendor Quotations → Vendor Purchase Orders.
- Sell-side Contracts and an Invoices & Collections workflow.
- Unified Business Health on Command Center — one explainable score across sell-side, buy-side and collections.
- Automation Engine v2 (typed events, conditions and actions) replacing string-matched automation rules.
- Tenant-defined Custom Modules, deeper Saved Reports, self-serve signup & plans, and Public API v1 keys.

Buy-side operations — the new procurement chain

A complete purchasing workflow now sits alongside the existing sell-side pipeline, under Business.

WHAT'S NEW

Four connected modules cover buying from vendors, end to end.

HOW IT WORKS

- Vendors: buy-side supplier/OEM/contractor master data.
- Procurement Requests: internal requests to buy, approved outside the sales hierarchy.
- Vendor Quotations: quotes received from vendors, compared side-by-side against a request.
- Vendor Purchase Orders: the actual PO issued to a vendor, with server-owned status (draft → issued → acknowledged → received → closed) and a printable PDF.

WHO CAN DO IT

- Submit a request: edit-capable roles (canEdit / canEditPresales) or admin tools.
- Approve or reject: Admin, Management, or users with admin-tools access only — this is a separate right from incentive approval.
- Requesters see only their own requests, not the full tenant list, unless they are also approvers.
- Self-approval is blocked for every step in this chain.

Vendors

Business → Vendors — the supplier master list procurement is built on.

WHAT IT DOES

Holds buy-side supplier, OEM and contractor records — separate from customer Organizations.

HOW IT WORKS

- Create, edit and mark vendors inactive from Business → Vendors.
- A vendor cannot be hard-deleted while active — mark it inactive first.
- Feeds vendor pickers on Procurement Requests, Vendor Quotations and Vendor Purchase Orders.
- Does not handle accounting, tax ledgers or accounts payable — that stays in your finance system.

WHO CAN DO IT

- View: global view, edit-capable roles, or the owner/creator of the vendor record.
- Create / edit: edit-capable roles.
- Delete: only once a vendor is set to inactive.

Procurement Requests

Business → Procurement — ask to buy something, with formal approval.

WHAT IT DOES

Captures a buy-side request against a vendor and routes it through approval before a PO is raised.

HOW IT WORKS

- Submit a request against a chosen vendor with an estimated amount.
- Runs on the same Approval Engine as deal registrations and incentives, but as its own entity.
- Approvers re-check visibility on every approve/reject so a hidden request can't be approved blind.
- Once approved, a request can be linked to Vendor Quotations and a Vendor Purchase Order.

WHO CAN DO IT

- Submit: canEdit, canEditPresales, or admin-tools access.
- Approve / reject: Admin, Management, or admin-tools access only.
- Not the same right as canApproveIncentives — procurement approval is kept separate from channel incentives.
- View: global view, approvers, or the requester of that record.

Vendor Quotations

Business → Vendor Quotes — compare what vendors quoted before you commit.

WHAT IT DOES

Captures quotes received from vendors so they can be compared and kept as evidence.

HOW IT WORKS

- Log a quote and link it to a procurement request for side-by-side comparison.
- Status moves received → shortlisted → selected / rejected / withdrawn.
- Selecting one quote automatically demotes any other 'selected' quote on the same request back to shortlisted — with a status-history note.
- Quotes can exist without a request, purely as reference evidence.

WHO CAN DO IT

- View: global view, procurement approvers, vendor managers, the creator, or anyone who can already see the linked request.
- Being able to submit a request alone does not grant tenant-wide access to all quotes.

Vendor Purchase Orders

Business → Vendor POs — the formal order issued to a vendor.

WHAT IT DOES

A dedicated buy-side purchase order, distinct from the customer-facing Orders you already use.

HOW IT WORKS

- Server-generated numbering: VPO-{year}-{sequence}.
- Status is server-owned: draft → issued → acknowledged → received → closed (cancel available from draft/issued/acknowledged).
- Only a draft VPO can be edited or deleted.
- Optionally links back to its originating procurement request and vendor quotation.
- Generate a printable PDF directly from the list — a Vendor PO created from a selected quote seeds a summary line automatically.

WHO CAN DO IT

- View: global view, procurement approvers, vendor managers, the creator, or anyone who can see the linked request.
- Submitting a request does not by itself grant visibility into every VPO in the tenant.

Contracts

My Work → Contracts — what happens after a deal or order is won.

WHAT IT DOES

Owns the sell-side contract lifecycle after a PO or order closes.

HOW IT WORKS

- Track draft → active → renewal / expiry / termination, with notice periods and obligations.
- Link a contract to its account and, optionally, the deal or purchase order it came from.
- Attach the contract document (stored via the same document links used elsewhere in Navynt).
- Every status change is written to a status history for audit.

WHO CAN DO IT

- Create / edit: canEdit or canEditPresales.
- Change status: same edit rights, or the owner activating their own draft.
- Delete: draft contracts only — by the creator or a user with canEdit.
- View: scoped to the deal, account team or owner — plus anyone with global visibility.

Invoices & Collections

My Work → Invoices — track what's owed without replacing your accounting system.

WHAT IT DOES

Operational invoice references and a collections workflow — not a ledger.

HOW IT WORKS

- Server-numbered as INV-{year}-{sequence}, with an optional external reference back to your accounting system.
- Status flow: draft → open → partial / collected / disputed / written-off / cancelled, with an automatic aging calculation.
- Optionally link an invoice to its account, deal, customer PO or contract.
- External accounting remains the authority for the ledger, tax and statutory books — Navynt tracks collection follow-up, not tax filing.

WHO CAN DO IT

- Open a draft: the assigned collector or presales role.
- Move the lifecycle forward (partial, collected, etc.): requires canEdit.
- View: same scoped model as Contracts — deal, account team, collector/creator, or global visibility.

Unified Business Health

Command Center — one explainable score across sell-side, buy-side and collections.

WHAT IT DOES

Brings forecast risk, vendor delivery risk and overdue collections into a single panel.

HOW IT WORKS

- Sell-side: forecast confidence, at-risk deals, AMC/renewal risk.
- Buy-side: vendor POs running past expected delivery, drafts stuck in progress, pending procurement approvals.
- Collections: past-due invoices that are open, partial or disputed.
- Every movement in the score is shown as a named factor with its impact — there are no unexplained AI labels.
- Also feeds the Needs Attention list and the Ops Admin summary card.

WHO CAN DO IT

- Everyone who opens Command Center — the panel reuses your existing session-scoped visibility.
- No separate permission is required and no new data becomes visible beyond what you could already see.

Automation Engine v2

Operations → Workflows — the same place, a stronger engine underneath.

WHAT CHANGED

Automation moved from named, hard-coded rules to a typed event → condition → action model.

HOW IT WORKS

- Typed events such as `deal.updated`, `deal.stalled`, `task.due_soon` and `approval.sla_breached` replace string-matched rule names.
- Every run produces an execution record, so failures can be retried instead of silently disappearing.
- Existing automations you had configured keep working — this is an engine upgrade, not a UI change you need to relearn.
- New automations can react to the new Contracts, Invoices and Procurement events as they roll out.

WHO CAN DO IT

- Configure automation rules: the same Operations / admin-tools access as before.
- Everyone continues to see the effects of automation (flags, notifications, tasks) according to their normal visibility.

Custom Modules

Administration → Business Setup — model data unique to your business.

WHAT IT DOES

Lets a workspace define its own record types alongside the built-in CRM objects.

HOW IT WORKS

- Add fields of type text, number, date, select or lookup.
- Lookups can point to Deals, Accounts or Partners — a custom module cannot look up another custom module.
- Chained lookups resolve up to 3 hops deep.
- Field and module names are automatically slugified into safe, stable keys.

WHO CAN DO IT

- Define modules and fields: Administration access (Business Setup).
- Use the resulting records day to day: whoever the module's own permissions and visibility rules grant access to.

Reports — new depth

Insights → Reports — saved views now run and deliver on their own.

WHAT'S NEW

Saved reports gained a server-side run/export path and scheduled delivery.

HOW IT WORKS

- Saved report presets across Deals, Accounts and Partners with filter operators (equals, contains, greater/less than, in).
- Reports can now be run and exported on the server, not only the browser.
- Scheduled email delivery of a saved view, on a cron schedule, to a chosen recipient list.
- A role-aware weighted forecast card is available to Admins on the Reports view.

WHO CAN DO IT

- Run / export: respects the same hierarchy-based visibility as the live data — a saved view can never surface rows you couldn't otherwise see.
- Schedule delivery: the view's owner.
- Weighted forecast card: Admin only, for now.

New rights introduced with this update

These sit alongside the existing roles and permissions covered earlier in this guide — nothing already granted has changed.

New right	Controls	Typically held by
Submit procurement	Create a Procurement Request	canEdit / canEditPresales / admin-tools roles
Approve procurement	Approve or reject Procurement Requests, Vendor Quotation selection integrity	Admin, Management, or admin-tools access — not the same as incentive approval
Manage vendors	Create / edit Vendors, seen on Vendor Quotes & VPOs	Edit-capable roles; also a distinct 'vendor manager' visibility grant
Edit contracts	Create / edit / change status on Contracts	canEdit or canEditPresales
Collect on invoices	Open draft invoices, progress collection status	Assigned collector, presales, or canEdit for full lifecycle changes
Configure custom modules	Define tenant-specific modules & fields	Administration (Business Setup)
Mint API v1 keys	Create tenant-wide read-only API keys (deals / accounts / partners)	Admin only

Design principle: every new approval or buy-side right is deliberately kept separate from existing sales-approval rights (e.g. incentive approval), so granting one never silently grants the other.

Platform & administration updates

Changes an administrator should know about, even if day-to-day users do not see them.

HOW IT WORKS

New workspaces start on permanent Free after verification: 3 users, 1,000 records and 2 reporting layers. Plans are Free / Starter / Growth / Scale / Enterprise. Elevated Starter trials apply only to eligible legacy workspaces.

The Platform Admin console is restricted to Navynt staff and is separate from tenant administration.

Public API keys are admin-minted and tenant-wide within their granted read scopes (deals / accounts / partners), rather than one salesperson's hierarchy. API access is included on Growth, Scale and Enterprise.

Self-service pages cover signup, sign-in completion, password reset and SSO. SSO is included on Enterprise; legacy entitlements are preserved.

WHO CAN DO IT

Workspace administrators choose plans in **Plans & billing**. Security owners retain protected API-key and SSO controls. SSO keys follow the documented rotation and recovery procedure.

Run the business. Don't just record it.

Know what matters today. Prepare for tomorrow. Keep the source records current.

- Start in Command Center.
- Execute in Today and My Work.
- Maintain source records under Business.
- Use Technical Work when your role requires it.
- Prepare Tomorrow before it becomes Today.
- Use Team, Insights and Operations according to your responsibility.
- Let Administration control configuration, security, approvals and governance.

Need help?

If a feature is not visible or an action is unavailable, ask your Navynt workspace administrator to check your role and permissions.

Billing and workspace limits

Flat USD prices per workspace, excluding tax. Annual prices are total yearly charges.

Plan	Monthly	Yearly	Users	Records	Layers	Partners	Storage
Free	\$0	\$0	3	1,000	2	0	10 MB
Starter	\$49	\$468	10	25,000	3	0	500 MB
Growth	\$129	\$1,188	30	150,000	6	25	5 GB
Scale	\$299	\$2,868	75	Unlimited	Unlimited	Unlimited	10 GB
Enterprise	Custom	Custom	Custom	Custom	Custom	Custom	Custom

Records include accounts, contacts, partner organisations, deals and vendors. Internal active, invited and pending users count toward seats; portal logins do not. Layers measure reporting depth. Storage totals tenant files, including evidence and generated quotations.

Administrators choose monthly or yearly billing, preview prorated upgrades, and schedule downgrades at renewal. Failed renewals have seven days of grace, then business writes become read-only. Cancellation retains access through the paid period.

Workspace currency is selected during setup or in General Platform Configuration. Display units follow the workspace region; subscription billing remains in USD. Existing tenants' entitlements and eligible legacy trials are preserved.

Workspace tools and everyday workflows

Find Workspace tools: use the sidebar button. Get started shows a checklist for your role. Appearance switches the app between light and dark modes. Your role still controls which modules you can open.

CSV and Excel imports: opportunity imports offer field mapping and duplicate preview before you confirm. Accounts also accept CSV from their Import button, including a contact name, email and phone. Import history allows undo for 30 days; edited records or records with related work cannot be undone.

Recycle bin: tenant admins can restore deleted business records within 30 days. Restore an account before its opportunity. An opportunity restore includes its deleted notes, tasks and links from the same deletion. Current plan limits apply; financial-document restoration is limited to drafts.

Attachments and signed copies: open an account or opportunity and choose Attachments. Contracts offer Signed copies & files. PDF, JPG and PNG files are limited to 10 MB each and count toward tenant storage. Files can be permanently removed to free storage; deleted file bytes cannot be restored. A signed-copy upload stores evidence; it does not collect or certify an electronic signature.

Email, calls and integrations

Email templates and follow-ups: save templates in Workspace tools, then select one in Send Email. Schedule up to five reviewed messages for one recipient. Processing runs every five minutes. Messages stop on an inbound reply, a closed opportunity or loss of access. Needs review means delivery is uncertain and no automatic resend occurs.

Calls and contacts: Notes & History offers Call & log outcome. Call links open your device calling app; save the actual outcome and duration afterwards. You can add a synced email sender to account contacts after review. Account details offer contact merge with a primary contact and retained merge history.

Lead forms and alerts: tenant admins can create an enquiry form with an active owner and their privacy notice. Bot verification is required before submissions are stored. Slack/Teams alerts require a supported webhook configured by your admin, an eligible plan, and a successful test alert. Provider setup is separate from installing the app update.