

#332600 NAXT Set-up for Michaela Reynolds

Submitted

Received via

Requester

22 March 2022 at 11:20

Mail

Riekie Schutte <riekie.schutte@goughcat.co.nz>

CCs

CAT Warranty <warranty@terracat.co.nz>, IT Service Desk <servicedesk@terracat.co.nz>, Michaela Reynolds <michaela.reynolds@terracat.co.nz>

Status

Type

Priority

Group

Assignee

Solved

Problem

Normal

Service Desk

Jess Beattie

Category

Misc Help

Riekie Schutte March 22, 2022 at 11:20

Hi Jess,

Michaela will be taking over the reconciliation of warranty EPP

Some of her settings and capabilities to do this is not working for her – These are the issues we picked up now – Because we cant continue with the process I cant see what else is not working for her

DO you want to do a quick Teams meeting and I can take you through the process she needs to do ? Will this help ?

Michaela Screen - Serial Numbers Missing ?

shows all the serial #

My Screen –

Settlement	summary	claim	settlement	settlement	supplemental	claim	Microsoft Excel	Debit handling	Attach
View	View	Actions					List		
Warranty claims (Unsaved filter)									
Serial number	Worker	Warranty claim	Version	Warranty type	Coverage type	Warranty status	Start date	Clas	
		IW*				Created			
		CU%04880	1			Created			
		CU%04894	1			Created			
		CU%05064	1			Created			
PRG10362	Riekie Schutte	CU%07474	1			Created			
		CU%07652	1			Created			
		CU%07797	1			Created			
		CU%07841	1			Created			
AW400892	Riekie Schutte	CU%07863	1			Created			
PRG10362	Riekie Schutte	CU%08093	1			Created			
PRG10362	Riekie Schutte	CU%08094	1			Created			
JEY00223	Riekie Schutte	EP%25863	1			Created			
JEY00223	Riekie Schutte	EP%25955	1			Created			
MY200290	86SC235250	H5S8557	0.00	27/08/2018	0.00	CU%04880	20/08/2018		
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LJD01628	86SC346652	H577308	0.00	15/10/2021	0.00	CU%07797	13/10/2021		
PRG10361	86SC347812	H578721	0.00	29/10/2021	0.00	CU%07841	28/10/2021		
AW400892	86SC348588	H579811	0.00	8/11/2021	0.00	CU%07863	4/11/2021		
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H8X00971		H5X6337	0.00		0.00	EP%32941	7/10/2019		
JH703388		H534115	0.00		0.00	EP%44871	26/01/2021		
GCS00109	86SC338914	H566092	0.00	4/08/2021	0.00	EP%50202	2/08/2021		

Michaela Screen

My Screen – Active Combined order inquire

Equipment

Setup

Sales

Functions

Inquiries

Inventory transactions

Physical transactions

Combined order inquiry

Service call

Service letters

Standard jobs

Service schedule

Favourites

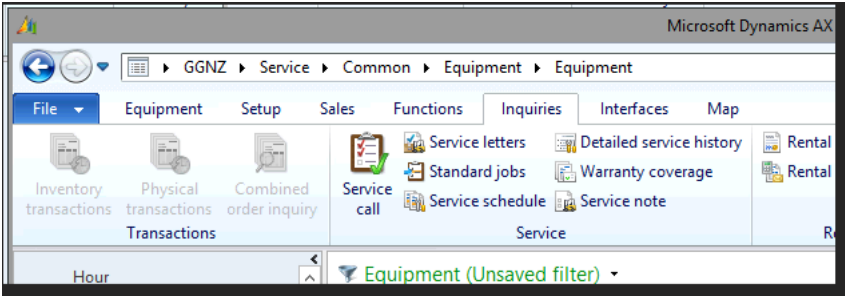
My favourites

Equipment (Unsaved filter)

Division:

Serial number

- Combined order Inquiry not active



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Jess Beattie March 22, 2022 at 12:18 Internal note
[Blair Doherty](#) wouldn't we need an amend user form for this?

Blair Doherty March 22, 2022 at 12:23 Internal note
Amend user form if she is changing roles.
For this if it is just NAXT access for the current role she is in as long as we get the right approval it should be fine on this ticket.
Maybe take a look at the document Steph sent out last week of the roles changing for people.

Regards, Blair Doherty

From: Jess Beattie (IT Service Desk) <support@itsdterracat.zendesk.com>
Sent: Tuesday, March 22, 2022 12:19 PM
Cc: Blair Doherty <Blair.Doherty@terracat.co.nz>
Subject: NAXT Set-up for Michaela Reynolds

You are a follower on this request (332600). Reply to this email to add an internal note to the request.

Jess Beattie (ITSD - Terra Cat)
Mar 22, 2022, 12:18 GMT+13
Private note
[Blair Doherty](#) wouldn't we need an amend user form for this?

Riekie Schutte
Mar 22, 2022, 11:20 GMT+13
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My Screen – Active Combined order inquire

File ▾

Equipment

Setup

Sales

Functions

Inquiries

Interfaces

Map

Inventory transactions

Physical transactions

Combined order inquiry

Service call

Service letters

Standard jobs

Service schedule

Service note

Detailed service history

Warranty coverage

Service

Rental lease history

Rental quote history

Rental

Favourites

My favourites

Equipment (Unsaved filter) ▾

Division:

Fleet type: All

Show active only: ☒

Serial number

Model

Equipment num-

Michaela Screen

Combined order Inquiry not active

Microsoft Dynamics AX

File ▾

Equipment

Setup

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Rental lease history

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Rental

Hour

Equipment (Unsaved filter) ▾

Riekie Schutte
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itsdterracat.zendesk.com/agent/tickets/332600

You are an agent. Add a comment by replying to this email or [view ticket in Zendesk Support](#).

Ticket # 332600

Status Open
Requester Riekie Schutte
CCs CAT Warranty, IT Service Desk, Jess Beattie, Michaela Reynolds
Followers Blair Doherty
Group Service Desk
Assignee Jess Beattie
Priority -
Type Ticket
Channel By Mail

This email is a service from ITSD - Terra Cat. Delivered by [Zendesk](#)

[MYPR6W-ZEYK]Ticket-Id:332600Account-Subdomain:itsdterracat

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Jess Beattie March 22, 2022 at 12:41

Hey Riekie,
Is this a complete change of role for Michaela or just extra next access that she is needing. If it is a change of role, we require an amend user form to be filled out by her manager or "new manager" http://forms.goughgroup.co.nz/index.php?option=com_rsform&formId=99

If it is just extra next access she is needing, an approval email is needed from her manager to prove that this is required and we would need to know a similar user so we know what access to give her :)

Kind regards,
Jess Beattie

Service Desk Analyst - Terra Cat
24 Amyes Road, PO Box 16168, Christchurch, 8042
P: 08000 95 95 98 E: Jess.Beattie@terracat.co.nz W: terracat.co.nz

Riekie Schutte March 22, 2022 at 12:52

Hi Jess I think you already have an approval email from her manger – some changes has already been made

Michaela could you pls confirm if this is the case ? This is only extra next access

Thanks

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From: Jess Beattie (IT Service Desk) <support@itsdterracat.zendesk.com>
Sent: Tuesday, 22 March 2022 12:41 pm
To: Riekie Schutte <Riekie.Schutte@terracat.co.nz>
Cc: Michaela Reynolds <Michaela.Reynolds@terracat.co.nz>; IT Service Desk <ServiceDesk@terracat.co.nz>; CAT Warranty <warranty@terracat.co.nz>
Subject: [IT Service Desk] Re: NAXT Set-up for Michaela Reynolds

Your request (332600) has been updated. To add additional comments, reply to this email.

Jess Beattie (ITSD - Terra Cat)

22/03/2022, 12:41 NZDT

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24 Amyes Road, PO Box 16168, Christchurch, 8042
P: 08000 95 95 98 E: Jess.Beattie@terracat.co.nz W: terracat.co.nz

Riekie Schutte

22/03/2022, 11:20 NZDT

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My Screen – Active Combined order inquire

File ▾ Equipment Setup Sales Functions Inquiries Interfaces Map

Inventory transactions Physical transactions Combined order inquiry Service call Service letters Detailed service history Rental lease history Equipment purchase attachments

Standard jobs Warranty coverage Rental quote history Service schedule Service note Rental

Favourites My favourites

Equipment (Unsaved filter) ▾

Division: Fleet type: Show active only: ☒

Serial number Model Equipment number

Michaela Screen

Combined order Inquiry not active

Microsoft Dynamics AX

GGNZ ▸ Service ▸ Common ▸ Equipment ▸ Equipment

File ▾ Equipment Setup Sales Functions Inquiries Interfaces Map

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Hour



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Riekie Schutte March 22, 2022 at 12:54

Sorry forgot this part

You can use me as a similar user for access – Warranty type and Equipment are the most important ones to get the same access

Riekie Schutte
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PRG10362	865C356098	H590596	0.00	14/02/2022	0.00	CU%08094	10/02/2022
JEY00223	865C239026	H5T3361	0.00	16/10/2018	0.00	EP%25863	10/10/2018
JEY00223	865C239613	H5T3493	0.00	19/10/2018	0.00	EP%25955	12/10/2018
H5M06343	865C240186	H5T4611	0.00	30/10/2018	0.00	EP%26171	26/10/2018
H5M06343	865C240187	H5T4612	0.00	30/10/2018	0.00	EP%26172	26/10/2018
AMA00841		L8F4321	0.00		0.00	EP%30496	5/06/2019
GW700699		H5X6318	0.00		0.00	EP%32922	7/10/2019
H8X00971		H5X6337	0.00		0.00	EP%32941	7/10/2019
JH703388		H534115	0.00		0.00	EP%44871	26/01/2021
GCS00109	865C338914	H566092	0.00	4/08/2021	0.00	EP%50202	2/08/2021

My Screen – Active Combined order inquire

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Rental quote history

Rental

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Equipment (Unsaved filter)

Division:

Fleet type:

Show active only: ☒

Serial number

Model

Equipment num-

Michaela Screen Combined order Inquiry not active

Microsoft Dynamics AX

File

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Rental

Hour

Equipment (Unsaved filter)

Riekie Schutte
Warranty Coordinator - Terra Cat
 16 Branston Street, PO Box 16168, Christchurch, 8441
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 E: Riekie.Schutte@terra.cat.co.nz | terra.cat.co.nz | [f](#) [i](#) [g](#)



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This email is a service from ITSD - Terra Cat. Delivered by [Zendesk](#)

[MYPR6W-ZEYK]

Michaela Reynolds March 22, 2022 at 13:07

Hi Jess,

Can you use the previous approval from Stephen Frayle?

Michaela Reynolds

Branch Administrator - Terra Cat

20 Bennett Street, PO Box 1141, Palmerston North, 4440

DDI: +6469533645

E: Michaela.Reynolds@terraecat.co.nz | W: terraecat.co.nz |  



From: Riekie Schutte <Riekie.Schutte@terraecat.co.nz>

Sent: Tuesday, 22 March 2022 12:54 pm

To: IT Service Desk <support+id332600@itsdterraecat.zendesk.com>

Cc: Michaela Reynolds <Michaela.Reynolds@terraecat.co.nz>; IT Service Desk <ServiceDesk@terraecat.co.nz>; CAT Warranty <warranty@terraecat.co.nz>

Subject: RE: [IT Service Desk] Re: NAXT Set-up for Michaela Reynolds

Sorry forgot this part

You can use me as a similar user for access – Warranty type and Equipment are the most important ones to get the same access

Riekie Schutte

Warranty Coordinator - Terra Cat

16 Branston Street, PO Box 16168, Christchurch, 8441

M: +64 21 227 6898 | DDI: +64 21 227 6898

E: Riekie.Schutte@terraecat.co.nz | W: terraecat.co.nz |  



From: Jess Beattie (IT Service Desk) <support@itsdterraecat.zendesk.com>

Sent: Tuesday, 22 March 2022 12:41 pm

To: Riekie Schutte <Riekie.Schutte@terraecat.co.nz>

Cc: Michaela Reynolds <Michaela.Reynolds@terraecat.co.nz>; IT Service Desk <ServiceDesk@terraecat.co.nz>; CAT Warranty <warranty@terraecat.co.nz>

Subject: [IT Service Desk] Re: NAXT Set-up for Michaela Reynolds

Your request (332600) has been updated. To add additional comments, reply to this email.

Jess Beattie (ITSD - Terra Cat)

22/03/2022, 12:41 NZDT

Hey Riekie,

Is this a complete change of role for Michaela or just extra next access that she is needing. If it is a change of role, we require an amend user form to be filled out by her manager or "new manager" http://forms.goughgroup.co.nz/index.php?option=com_rsform&formId=99

If it is just extra next access she is needing, an approval email is needed from her manager to prove that this is required and we would need to know a similar user so we know what access to give her :)

Kind regards,

Jess Beattie

Service Desk Analyst - Terra Cat

24 Amyes Road, PO Box 16168, Christchurch, 8042

P: 08000 95 95 98 E: Jess.Beattie@terraecat.co.nz W: terraecat.co.nz

Riekie Schutte

22/03/2022, 11:20 NZDT

Hi Jess,

Michaela will be taking over the reconciliation of warranty EPP

Some of her settings and capabilities to do this is not working for her – These are the issues we picked up now – Because we cant continue with the process I cant see what else is not working for her

DO you want to do a quick Teams meeting and I can take you through the process she needs to do ? Will this help ?

Michaela Screen - Serial Numbers Missing ?

Screen – shows all the serial #

My

Settlement	summary View	claim	settlement	settlement	supplemental	claim	Microsoft Excel	Debit handling	Attach
Actions									
Warranty claims (Unsaved filter)									
Serial number	Worker	Warranty claim	Version	Warranty type	Coverage type	Warranty status	Start date	Cl	
		IW*				Created			
		CU%04880	1			Created			
		CU%04894	1			Created			
		CU%05064	1			Created			
PRG10362	Riekie Schutte	CU%07474	1			Created			
		CU%07652	1			Created			
		CU%07797	1			Created			
		CU%07841	1			Created			
AW400892	Riekie Schutte	CU%07863	1			Created			
PRG10362	Riekie Schutte	CU%08093	1			Created			
PRG10362	Riekie Schutte	CU%08094	1			Created			
JEY00223	Riekie Schutte	EP%25863	1			Created			
JEY00223	Riekie Schutte	EP%25955	1			Created			

MY200290	86SC235250	H558557	0.00	27/08/2018	0.00	CU%04880	20/08/2018
GB600225	86SC235352	H559057	0.00	28/08/2018	0.00	CU%04894	27/08/2018
M4M00133	86SC240643	H5T5389	0.00	2/11/2018	0.00	CU%05064	1/11/2018
PRG10362	86SC336282	H562301	0.00	9/07/2021	0.00	CU%07474	2/07/2021
HR900312	86SC342545	H571570	0.00	30/08/2021	0.00	CU%07652	24/08/2021
LID01628	86SC346652	H577308	0.00	15/10/2021	0.00	CU%07797	13/10/2021
PRG10361	86SC347812	H578721	0.00	29/10/2021	0.00	CU%07841	28/10/2021
AW400892	86SC348588	H579811	0.00	8/11/2021	0.00	CU%07863	4/11/2021
PRG10362	86SC356045	H590522	0.00	11/02/2022	0.00	CU%08093	9/02/2022
PRG10362	86SC356098	H590596	0.00	14/02/2022	0.00	CU%08094	10/02/2022
JEY00223	86SC239026	H5T3361	0.00	16/10/2018	0.00	EP%25863	10/10/2018
JEY00223	86SC239613	H5T3493	0.00	19/10/2018	0.00	EP%25955	12/10/2018
H5M06343	86SC240186	H5T4611	0.00	30/10/2018	0.00	EP%26171	26/10/2018
H5M06343	86SC240187	H5T4612	0.00	30/10/2018	0.00	EP%26172	26/10/2018
AMA00841		L8F4321	0.00		0.00	EP%30496	5/06/2019
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H8X00971		H5X6337	0.00		0.00	EP%32941	7/10/2019
JH703388		H534115	0.00		0.00	EP%44871	26/01/2021
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Rental quote history

Rental

Equipment purchase history

Attachment

Favourites

My favourites

Equipment (Unsaved filter)

Division:

Fleet type:

Show active only: ☒

Serial number

Model

Equipment number

Michaela Screen

Combined order Inquiry not active

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Equipment purchase history

Attachment

Favourites

My favourites

Equipment (Unsaved filter)

Division:

Fleet type:

Show active only: ☒

Serial number

Model

Equipment number

Riekie Schutte
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 16 Branston Street, PO Box 16168, Christchurch, 8441
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 E: Riekie.Schutte@terra.cat.co.nz | terra.cat.co.nz | [f](#) [i](#) [g](#)



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Jess Beattie March 23, 2022 at 09:52

Internal note

Approval is on this ticket <https://itsdterracat.zendesk.com/agent/tickets/332272>

Jess Beattie March 23, 2022 at 09:56

Internal note

Changes made

Worker (1) - Name: Riekie Schutte, 02593

File

Worker

Time registration

Project management

Expense management

Payroll

WMS

New case

Image

Delete

Hire new worker

Transfer worker

Terminate

Create eligibility event

Add assignment

Edit assignment

End assignment

Employment history

Set up

View in hierarchy

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Taxes

Maintain

Personnel actions

Worker position assignments

Position assignment

Versions

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Absence

Compensation

Payroll

Competencies and development

Parts

Order class

WMS

Service

Power Systems

IT

Current record

Riekie Schutte

Terra Industrial New Zealand Ltd

Setup

Administration

Call type: SERIALISED EQUIPMENT

Call status: Registered

Enable backorder for technician: ☐

Enable Payment territory change: ☐

Override line property: ☐

Invoicing

Partial invoicing: ☒

Warranty invoicing: ☒

Contract invoicing: ☐

Warranty

Enable last labour date change: ☒

Enable claim status change: ☒

Enable claim class change: ☒

Inquiry defaults

Warehouse: 60a

Tool warehouse: 00

Enable spell checking

Spell check: ☐

Return location

Parts return warehouse:

Parts return location:

Worker (1) - Name: Michaela Reynolds, 01501

File

Worker

Time registration

Project management

Expense management

Payroll

WMS

New case

Image

Delete

Hire new worker

Transfer worker

Terminate

Create eligibility event

Add assignment

Edit assignment

End assignment

Employment history

Set up

View in hierarchy

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Compensation

Payroll

Competencies and development

Parts

Order class

WMS

Service

Power Systems

IT

Current record

Michaela Reynolds

Terra Industrial New Zealand Ltd

Setup

Administration

Call type: SERIALISED EQUIPMENT

Call status: Registered

Enable backorder for technician: ☐

Enable Payment territory change: ☐

Override line property: ☒

Invoicing

Partial invoicing: ☒

Warranty invoicing: ☒

Contract invoicing: ☐

Warranty

Enable last labour date change: ☒

Enable claim status change: ☒

Enable claim class change: ☒

Inquiry defaults

Warehouse: 26A

Tool warehouse: 26A

Enable spell checking

Spell check: ☐

Return location

Parts return warehouse:

Parts return location:

Worker (1) - Name: Riekie Schutte, 02593

File

Worker

Time registration

Project management

Expense management

Payroll

WMS

New case

Image

Delete

Hire new worker

Transfer worker

Terminate

Create eligibility event

Add assignment

Edit assignment

End assignment

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Competencies and development

Parts

Order class

WMS

Service

Power Systems

IT

Current record

Riekie Schutte

Terra Industrial New Zealand Ltd

Assignments

Order class: SERVICE

Selected

ITEM SERV Service lte

OVERHEADS Overhead: Outside W

OWM Outside W

PARTEQUIP Parts Orde

PARTGMH NLA Parts

SERVICE Service Mx

WARRANTY Warranty f

Available

CANCELLED Cancell

CAT EQUIP CAT

CAT MINING CAT

CAT TRUCKS CAT

CAT USED CAT

ENG ENG

ENG PRD NLA

GMH EQUIP NLA

GMH RENTAL NLA

Worker (1) - Name: Michaela Reynolds, 01501

File

Worker

Time registration

Project management

Expense management

Payroll

WMS

New case

Image

Delete

Hire new worker

Transfer worker

Terminate

Create eligibility event

Add assignment

Edit assignment

End assignment

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Competencies and development

Parts

Order class

WMS

Service

Power Systems

IT

Current record

Michaela Reynolds

Terra Industrial New Zealand Ltd

Assignments

Order class: SERVICE

Selected

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ITEM SERV Service

OVERHEADS Overh

OWM Outsid

PARTEQUIP Parts

PARTGMH NLA P

SERVICE Service

WARRANTY Warra

Available

CANCELLED Cancell

ENG PRD NLA

ENG PRD NLA

GMH EQUIP NLA

GMH RENTAL NLA

GMH SVC NLA

PAL EQUIP NLA

PARTNZT NLA

PARTNZT NLA

Jess Beattie March 23, 2022 at 09:57

Hey Michaela,
Yes that's no worries. I have now matched your profile with Riekie's.
Please close and reopen next. Let me know if there is anything still missing and please send a screenshot :)
Kind regards,
Jess Beattie

Service Desk Analyst - Terra Cat
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