

## #319154 Evelyn (Gatekeeper) to have access to Sales person setup in NAXT

**Submitted** Received via Requester

28 July 2021 at 15:21 Mail Jessica Macfarlane <jessica.macfarlane@goughcat.co.nz>

**CCs** 

Bradley Harrison <bradley.harrison@goughgroup.co.nz>, IT Service Desk <is\_sd@goughgroup.co.nz>, Jess Beattie <jess.beattie@goughgroup.co.nz>

**Status Type Priority** Group **Assignee** Task Due date Service Desk Jess Beattie Open Normal

Category

NAXT

Jessica Macfarlane July 28, 2021 at 3:21 PM

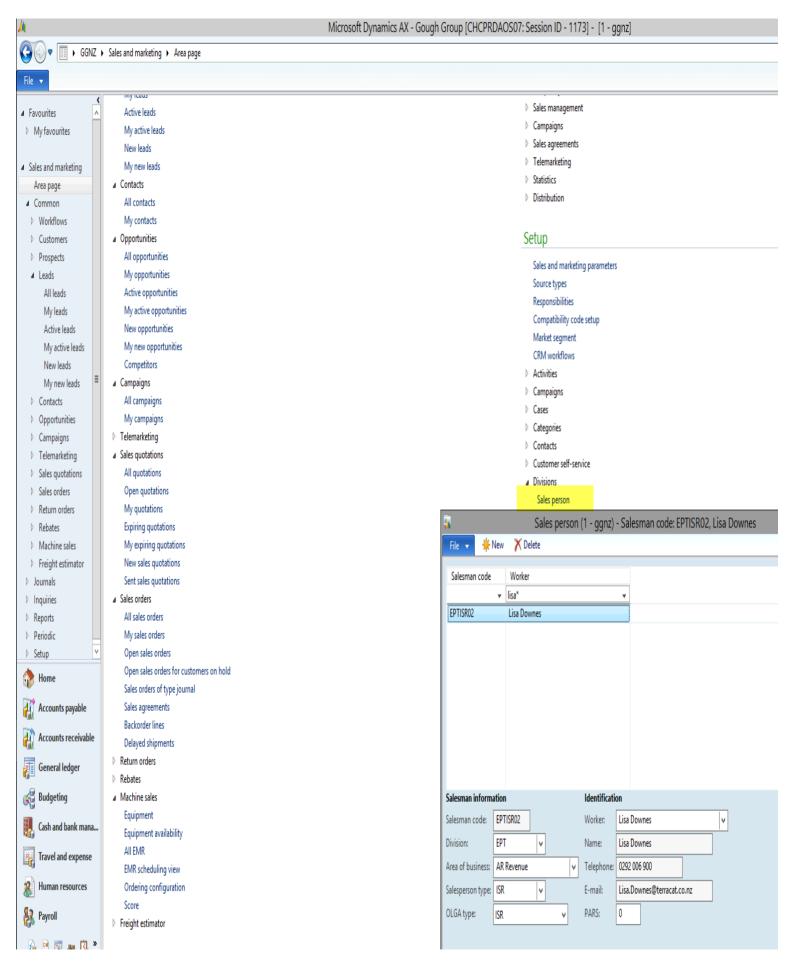
Hi,

Can you please identify which role Evelyn would need to see and edit the sales person? I have access to this, but as part of Evelyn's role it will be useful and necessary for her to be able to make updates in that form from time to time e.g. when a rep is replaced by another rep. We have a new CSAM starting soon to replace Justin Smith so this will be very helpful.

This access should be added to the 'Gatekeeper' roleset Bradley – are you keeping a document somewhere for this?

Thanks!

GGNZ > Sales and marketing > Setup > Divisions > Sales person



Regards

Jessica Macfarlane **Business Process Analyst - Terra Cat** Branston Street, PO Box 16168, Christchurch, 8441

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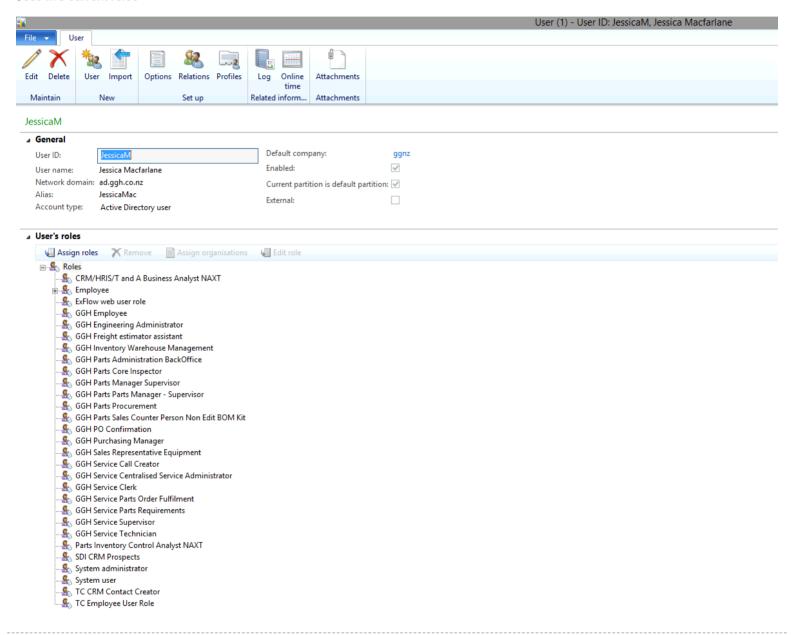
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Jess Beattie July 28, 2021 at 3:24 PM

Internal note

Note:

Jess M's current roles



Jess Beattie July 28, 2021 at 3:29 PM

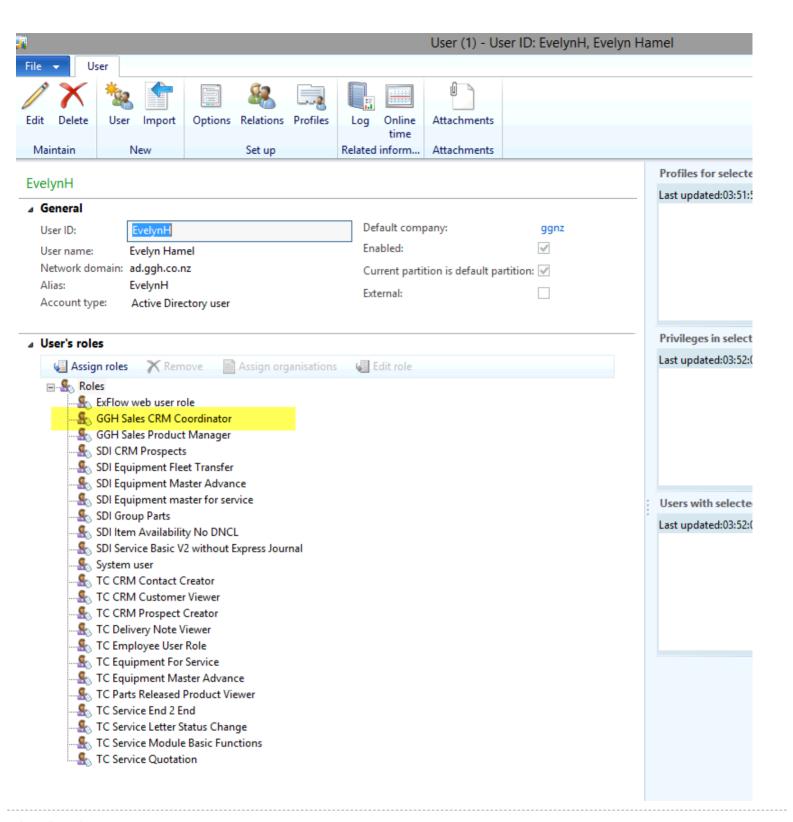
Internal note

Roles exported from Naxt that give access to this area Looks like it is the CRM/HRIS/T and A Business Analyst Naxt which Jess M has Probably should get a better role created..

Jess Beattie July 28, 2021 at 3:52 PM

∣ Internal note

Have given Evelyn the GGH\_SALE\_CRM\_COORD role Will create a TFS ticket for a new role to be developed



Jess Beattie July 28, 2021 at 3:54 PM

Hey Jess,

I have done my investigations,m consulted Bradley and we have found a GGH role that will give Evelyn that access. I will create a TFS ticket for a new role to be developed as we continue to move away from all the GGH roles:)

Evelyn will need to close and reopen Naxt for the changes to take effect.

Kind regards,

Jess Beattie

Service Desk Analyst - Terra Cat

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