

#335666 Naxt approvals

Submitted 16 May 2022 at 12:53 **Received via** Mail **Requester** Stephen Kelly <stephen.kelly@goughcat.co.nz>

CCs
Barbara Whelan <barbara.whelan@goughcat.co.nz>, Gavin Hoyland <gavin.hoyland@goughcat.co.nz>, IT Service Desk <servicedesk@terracat.co.nz>

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

Category
NAXT

Stephen Kelly May 16, 2022 at 12:53
I am getting 58 A store approvals which should be going to Gavin, probably to do with Barbara raising them?
Steve

Favourites

My favourites

Home

Role centre

Area page

Common

Inquiries

Reports

Setup

Home

Accounts payable

Accounts receivable

General ledger

Budgeting

Cash and bank management

SRV 68A Warranty service segments to monitor

SRV 68A Service calls staged for invoicing

SRV 68A Service calls to review

SRV 68A WIP > 15 days since last labour

SRV 68A WIP > 15 days open no labour

SRV 68A Service Reports to Check

SRV 70A Service calls credited not re-invoiced

SRV 70A Cash sale service calls

SRV 70A Warranty service segments to monitor

SRV 70A Service calls staged for invoicing

SRV 70A Service calls to review

SRV 70A WIP > 15 days since last labour

SRV 70A WIP > 15 days open no labour

SRV 70A Service reports to check

Add Cue

Manage Cues

Work list

Purchase Order 58A0000041 requires your approval.

Subject	Document type	ID	Due date	From	Creation date	Association
Purchase Order 58A0000041 requires you...	Purchase orders	Purchase order: 58A0000041, R.A. Johnstone & Co	16/05/2022 11:30:00 a.m.	BarbaraW	13/05/2022 11:30:47 a.m.	ggnz
Purchase Order 58A0000031 requires you...	Purchase orders	Purchase order: 58A0000031, R.A. Johnstone & Co	6/05/2022 10:30:00 a.m.	BarbaraW	5/05/2022 10:30:57 a.m.	ggnz

Connect

Microsoft Dynamics™

CustomerSource



Product news, resources, and documentation

Community

Collaborate with other business professionals like you

Online Services

Services that solve additional business scenarios

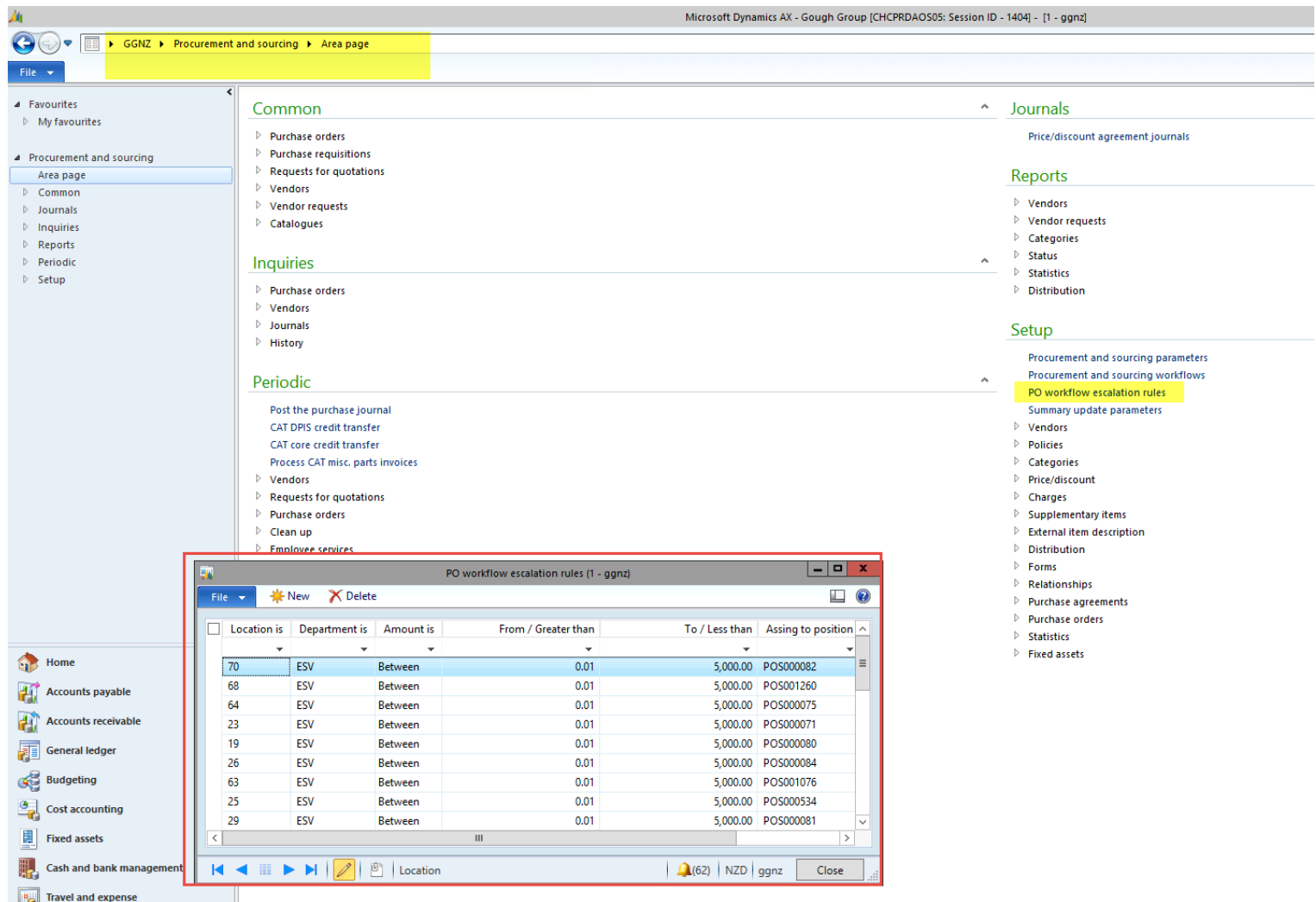
Stephen Kelly
Regional Operations Manager South Island - Terra Cat
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Jess Beattie May 16, 2022 at 13:48

Internal note

[Stephanie Lister](#) trying to suss this out once and for all so that I don't keep bugging you about workflow stuff :)
Would it be in here that we would change the workflow for certain PO's?



Location is	Department is	Amount is	From / Greater than	To / Less than	Assigning to position
70	ESV	Between	0.01	5,000.00	POS000082
68	ESV	Between	0.01	5,000.00	POS001260
64	ESV	Between	0.01	5,000.00	POS000075
23	ESV	Between	0.01	5,000.00	POS000071
19	ESV	Between	0.01	5,000.00	POS000080
26	ESV	Between	0.01	5,000.00	POS000084
63	ESV	Between	0.01	5,000.00	POS001076
25	ESV	Between	0.01	5,000.00	POS000534
29	ESV	Between	0.01	5,000.00	POS000081

Stephanie Lister May 16, 2022 at 13:52

Internal note

Ahhhh I don't think I was ever asked to add 58 in here.

It just needs to look the same as the others against Gavin's position number 😊



NAXT sometimes won't let you have that open and the position at the same time so you might want to use sandbox to grab the position.

Stephanie Lister

Business Systems Engineer - Terra Cat

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Cc: Stephanie Lister <stephanie.lister@terracat.co.nz>
Subject: Naxt approvals

You are a follower on this request (335666). Reply to this email to add an internal note to the request.

Jess Beattie (ITSD - Terra Cat)

16 May 2022, 13:48 GMT+12

Private note

[Stephanie Lister](#) trying to suss this out once and for all so that I don't keep bugging you about workflow stuff :)
Would it be in here that we would change the workflow for certain PO's?

GGNZ > Procurement and sourcing > Area page

File

Favourites

My favourites

Procurement and sourcing

Area page

Common

Journals

Inquiries

Reports

Periodic

Setup

Common

- Purchase orders
- Purchase requisitions
- Requests for quotations
- Vendors
- Vendor requests
- Catalogues

Inquiries

- Purchase orders
- Vendors
- Journals
- History

Periodic

- Post the purchase journal
- CAT DPIS credit transfer
- CAT core credit transfer
- Process CAT misc. parts invoices
- Vendors
- Requests for quotations
- Purchase orders
- Clean up
- Employee services

Journals

Price/discount agreement journals

Reports

- Vendors
- Vendor requests
- Categories
- Status
- Statistics
- Distribution

Setup

- Procurement and sourcing parameters
- Procurement and sourcing workflows
- PO workflow escalation rules**
- Summary update parameters

- Vendors
- Policies
- Categories
- Price/discount
- Charges
- Supplementary items
- External item description
- Distribution
- Forms
- Relationships
- Purchase agreements
- Purchase orders
- Statistics
- Fixed assets

PO workflow escalation rules (1 - ggnz)

File	New	Delete				
<input type="checkbox"/>	Location is	Department is	Amount is	From / Greater than	To / Less than	Assigning to position
70	ESV	Between	0.01	5,000.00	POS000082	
68	ESV	Between	0.01	5,000.00	POS001260	
64	ESV	Between	0.01	5,000.00	POS000075	
23	ESV	Between	0.01	5,000.00	POS000071	
19	ESV	Between	0.01	5,000.00	POS000080	
26	ESV	Between	0.01	5,000.00	POS000084	
63	ESV	Between	0.01	5,000.00	POS001076	
25	ESV	Between	0.01	5,000.00	POS000534	
29	ESV	Between	0.01	5,000.00	POS000081	

Location (62) NZD ggnz Close

I am getting 58 A store approvals which should be going to Gavin, probably to do with Barbara raising them?

Steve

The screenshot shows a Microsoft Dynamics 365 dashboard. On the left is a navigation pane with sections: Favourites (My favourites), Home (Role centre, Area page, Common, Inquiries, Reports, Setup), and a bottom section with icons for Accounts payable, Accounts receivable, General ledger, Budgeting, and Cash and bank management. The main area displays several 'Service segment' monitors with icons and counts, such as 'SRV 60A Warranty service segments to monitor' (48), 'SRV 60A Service calls staged for invoicing' (1), 'SRV 60A Service calls to review' (48), 'SRV 60A WIP > 15 days since last labour' (24), 'SRV 60A WIP > 15 days open no labour' (20), and 'SRV 60A Service Reports to Check' (3). Below these are more monitors for 'SRV 70A' segments. A 'Work list' section shows a table of purchase orders requiring approval. The table has columns: Subject, Document type, ID, Due date, From, Creation date, and Association. Two rows are visible, both for 'Purchase Order' documents from 'BarbaraW' with a 'ggnz' association. Below the work list is a 'Connect' section for Microsoft Dynamics, including links for CustomerSource, Community, and Online Services.

1	Subject	Document type	ID	Due date	From	Creation date	Association
	Purchase Order 58A0000041 requires your approval.	Purchase orders	Purchase order: 58A0000041, R.A. Johnstone & Co	16/05/2022 11:30:00 a.m.	BarbaraW	13/05/2022 11:30:47 a.m.	ggnz
	Purchase Order 58A0000031 requires your approval.	Purchase orders	Purchase order: 58A0000031, R.A. Johnstone & Co	6/05/2022 10:30:00 a.m.	BarbaraW	5/05/2022 10:30:57 a.m.	ggnz

Stephen Kelly

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itsdterra.cat.zendesk.com/agent/tickets/335666

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Ticket # 335666

Status Open

Requester Stephen Kelly

CCs Barbara Whelan, Gavin Hoyland, IT Service Desk
Followers Stephanie Lister
Group Service Desk
Assignee Jess Beattie
Priority -
Type Ticket
Channel By Mail

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Jess Beattie May 16, 2022 at 13:56 Internal note
[Stephanie Lister](#) no worries, thank you.
Glad I was in the right area. :)

Jess Beattie May 16, 2022 at 14:00
Hey Stephen,
I have now set this up in the workflow background so all PO's created for 58A should hopefully now go to Gavin :)
Kind regards,
Jess Beattie

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