



#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

Open

Task

Due date

Normal

Service Desk

Jess Beattie

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

Microsoft Dynamics AX - Gough Group [CHCPRDAOS07: Session ID - 1173] - [1 - ggngz]

File | GGNZ | Sales and marketing | Area page

File

Favourites

- My favourites

Sales and marketing

Area page

- Common
 - Workflows
 - Customers
 - Prospects
- Leads
 - All leads
 - My leads
 - Active leads
 - My active leads
 - New leads
 - My new leads
- Contacts
 - All contacts
 - My contacts
- Opportunities
 - All opportunities
 - My opportunities
 - Active opportunities
 - My active opportunities
 - New opportunities
 - My new opportunities
 - Competitors
- Campaigns
 - All campaigns
 - My campaigns
- Telemarketing
- Sales quotations
 - All quotations
 - Open quotations
 - My quotations
 - Expiring quotations
 - My expiring quotations
 - New sales quotations
 - Sent sales quotations
- Sales orders
 - All sales orders
 - My sales orders
 - Open sales orders
 - Open sales orders for customers on hold
 - Sales orders of type journal
 - Sales agreements
 - Backorder lines
 - Delayed shipments
- Return orders
- Rebates
- Machine sales
- Freight estimator
- Journals
- Inquiries
- Reports
- Periodic
- Setup

Home

Accounts payable

Accounts receivable

General ledger

Budgeting

Cash and bank mana...

Travel and expense

Human resources

Payroll

Active leads

My active leads

New leads

My new leads

Contacts

All contacts

My contacts

Opportunities

All opportunities

My opportunities

Active opportunities

My active opportunities

New opportunities

My new opportunities

Competitors

Campaigns

All campaigns

My campaigns

Telemarketing

Sales quotations

All quotations

Open quotations

My quotations

Expiring quotations

My expiring quotations

New sales quotations

Sent sales quotations

Sales orders

All sales orders

My sales orders

Open sales orders

Open sales orders for customers on hold

Sales orders of type journal

Sales agreements

Backorder lines

Delayed shipments

Return orders

Rebates

Machine sales

Equipment

Equipment availability

All EMR

EMR scheduling view

Ordering configuration

Score

Freight estimator

Sales management

Campaigns

Sales agreements

Telemarketing

Statistics

Distribution

Setup

Sales and marketing parameters

Source types

Responsibilities

Compatibility code setup

Market segment

CRM workflows

Activities

Campaigns

Cases

Categories

Contacts

Customer self-service

Divisions

Sales person

Sales person (1 - ggngz) - Salesman code: EPTISR02, Lisa Downes

File | New | Delete

Salesman code	Worker
EPTISR02	Lisa Downes

Salesman information

Salesman code: EPTISR02

Division: EPT

Area of business: AR Revenue

Salesperson type: ISR

OLGA type: ISR

Identification

Worker: Lisa Downes

Name: Lisa Downes

Telephone: 0292 006 900

E-mail: Lisa.Downes@terracat.co.nz

PARS: 0

Regards

Jessica Macfarlane**Business Process Analyst - Terra Cat**

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Jess Beattie July 28, 2021 at 3:24 PM

Internal note

Note:
Jess M's current roles


User (1) - User ID: JessicaM, Jessica Macfarlane

File

User

 Edit
  Delete
  User
  Import
  Options
  Relations
  Profiles
  Log
  Online time
  Attachments

Maintain

New

Set up

Related inform...





Attachments

JessicaM

General

User ID:	JessicaM	Default company:	ggnz
User name:	Jessica Macfarlane	Enabled:	<input checked="" type="checkbox"/>
Network domain:	ad.ggh.co.nz	Current partition is default partition:	<input checked="" type="checkbox"/>
Alias:	JessicaMac	External:	<input type="checkbox"/>
Account type:	Active Directory user		

User's roles

 Assign roles
  Remove
  Assign organisations
  Edit role

Roles

- CRM/HRIS/T and A Business Analyst NAXT
- Employee
 - ExFlow web user role
 - GGH Employee
 - GGH Engineering Administrator
 - GGH Freight estimator assistant
 - GGH Inventory Warehouse Management
 - GGH Parts Administration BackOffice
 - GGH Parts Core Inspector
 - GGH Parts Manager Supervisor
 - GGH Parts Parts Manager - Supervisor
 - GGH Parts Procurement
 - GGH Parts Sales Counter Person Non Edit BOM Kit
 - GGH PO Confirmation
 - GGH Purchasing Manager
 - GGH Sales Representative Equipment
 - GGH Service Call Creator
 - GGH Service Centralised Service Administrator
 - GGH Service Clerk
 - GGH Service Parts Order Fulfilment
 - GGH Service Parts Requirements
 - GGH Service Supervisor
 - GGH Service Technician
- Parts Inventory Control Analyst NAXT
- SDI CRM Prospects
- System administrator
- System user
- TC CRM Contact Creator
- TC Employee User Role

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

User (1) - User ID: EvelynH, Evelyn Hamel

File

User

Edit

Delete

User

Import

Options

Relations

Profiles

Log

Online time

Attachments

Maintain

New

Set up

Related inform...

Attachments

EvelynH

General

User ID:

EvelynH

Default company:

ggnz

User name:

Evelyn Hamel

Enabled:

☒

Network domain:

ad.ggh.co.nz

Current partition is default partition:

☒

Alias:

EvelynH

External:

☐

Account type:

Active Directory user

User's roles

Assign roles

Remove

Assign organisations

Edit role

Roles

ExFlow web user role

GGH Sales CRM Coordinator

GGH Sales Product Manager

SDI CRM Prospects

SDI Equipment Fleet Transfer

SDI Equipment Master Advance

SDI Equipment master for service

SDI Group Parts

SDI Item Availability No DNCL

SDI Service Basic V2 without Express Journal

System user

TC CRM Contact Creator

TC CRM Customer Viewer

TC CRM Prospect Creator

TC Delivery Note Viewer

TC Employee User Role

TC Equipment For Service

TC Equipment Master Advance

TC Parts Released Product Viewer

TC Service End 2 End

TC Service Letter Status Change

TC Service Module Basic Functions

TC Service Quotation

Profiles for selecte

Last updated:03:51:5

Privileges in select

Last updated:03:52:0

Users with selecte

Last updated:03:52:0

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

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