

Avalara Integration (Spec 5227)

Date Released: August /Sept 2017

Modules: The Avalara Tax calculation integration is only available in Navigator. It is used in the following parts of the system:

- Navigator Orders: Customer Order, Quote, Direct Ship, Credit Order for Sales and Use Tax
- Navigator Invoicing for Sales and Use Tax
- Navigator Credit Manager
- CMS / EDI - 850 - Order Creation and 810 Invoices
- Décor24 - Order Creation and Display
- Sales Portal - The Tax field in several locations shows the Avalara tax calculations.
- Selection Sheet Manager - Avalara tax calculation is enacted during Order Creation.

Description: Implement Avalara AvaTax for calculating tax on customer orders and invoices.

Reason for Change: Simplifies tax calculation.

When this functionality is turned on and set-up, the 3rd party Avalara AvaTax is automatically and seamlessly used for tax calculations.

Note: For more information on Avalara and information on setting up a Avalara template, refer to their website: https://help.avalara.com/Directory/AvaTax_Partner_Documentation_Help?

Assessing Taxes on Orders via Avalara

After the set-up is performed, the Avalara tax calculations in Navigator Order Entry are seamless and done behind the scenes.

Note: If the Avalara Tax calculation functionality is used, all the Dancik tax calculation functionality is bypassed.

The taxes are automatically calculated and assessed during Order Entry and invoice creation.

When Invoices are created the transaction is Committed in Avalara's system. It can be reversed by voiding the invoice (which can only be performed on "Today's Invoices").

Once Night Jobs runs the final tax value is stored in the Invoice file.

To see your committed Invoice transaction log into your Avalara portal.

Set-up

The following areas of the system have set-up needed:

- *3rd Party Configurations menu on page 238*

- *Company Settings - Menu Option SET 3 on page 239*
- *File Management on page 240*
- *Order Management on page 245*
- *Credit Manager on page 247*

3rd Party Configurations menu

Use this menu to enter the information needed by Avalara to interact with and get tax information from their application.

```

8/01/16          DANCIK DISTRIBUTION, LTD.          GBRANNEN
15:36:06          3rd Party Configurations          SAL
                                                    2014

Opt Description          Opt Description
Tax Related Configurations
  1 Tax Service Providers

** UNIVERSAL OPTIONS **
993 Display System Messages
994 Send System Messages
995 Your Printer Output
996 Output Distribution
997 Event Management
998 Logout of Menu System
999 Signoff

                                                    Bottom

Enter Desired Menu / Option# ====> 3RD 1

F1=Add  F2=Select  F5=Personal  F9=Additional  F10=Scan  F11=Alt View

```

Select option 1 - **Tax Service Providers** and then update the **Avalara** service provider record. A screen similar to the one shown below appears.

```

11/14/17          Service Provider Tax          TX3999MA
13:59:42          Service Provider Profile Maintenance  XD
Service Provider ID ..... AV          Change
Name .....: Avalara

Below are the variables specific to the designated service provider.

Field Description   Field Value
Access URL.....
Account#.....
License#.....
Company Code.....

Bottom

F6=Return  F7=Exit

```

The information on the Service Provider Profile Maintenance screen shown above is provided by Alavara. It allows them to know who is accessing their system so they can grant access to the tax information.

Company Settings - Menu Option SET 3

This setting turns on the Avalara Tax functionality for an entire company.

Enter a “4” to access the Tax options.

```

5/30/17          File Maintenance          FM3000R
10:42:06          Company File          QPADEV0013

Type options, press Enter.          Password : .....
1=System / Miscellaneous Options    2=A/R and Credit Options
3=Order / Invoice Print Options      4=Tax, G/L & Delivery/Route Options

Opt Company# and Description          Opt Company# and Description
- A COMPANY A                          - S R SCHEID, INC
- B DANKIK-ON-DISK INT'L, LTD.         - V TEST V
- C DANKIK-ON-DISK INT'L, LTD.         - X COMPANY X
- D DISPLAY OPERATIONS                 - Y TEST
- G G MANS TILE COMP                   - Z TEST
- H TEST FOR NAVIGATOR COMPANY VIE     - 0 DANKIK DISTRIBUTION, LTD.
- L TEST                                - 1 DANKIK OF CANADA
- M M - COMPANY CHANGE RECORD          - 4 2 DANKIK INTERNATIONAL, LTD.
- N Name of Company                    - 3 DANKIK TILE & MARBLE
- O OTHER COMPANY                      - 4 MIKE'S TEST/TRAINING CO.
- P R SCHEID, INC                      - 5 D'S TEST FOR GUI
- R R SCHEID, INC                      - 6 TEST2

More...

F2=Position  F7=Exit          Roll Up/Down

```

Ensure the **Use External Tax Institution** setting is set to “Y” and “AV” is entered as the **Institution**.

```
5/30/17          File Maintenance          FM3000RD
10:50:02          Company File              QPADEV0013

Company# ..... 2 DANCIK INTERNATIONAL, LTD.      * Update *

Tax Options
Apply Tax On Freight ..... Y Y/N
Apply Taxes to Fund Contributions / Over Bills . Y Y/N
Use External Tax Institution..... Y Y/N  Institution: AV (?)

G/L Options
Ending Month Of Fiscal Yr.  3          Use GL Validation Tables . N Y/N
Ending Day Of Fiscal Yr .. 31          Double Space Option ..... N Y/N
Last Closed Fiscal Year .. 15          Valid GL# For F6 Charges.. B (?) *BOTH

Delivery / Route Options
Maintain Delivery Ship Via in Classification Code File Maintenance
Delivery Charge On COD ..... N Y/N
Use Entire Truck Route / Stop Systems ..... Y Y/N
```

File Management

- *Avalara Customer Usage Type on page 241*
- *Item File - Navigator File Management on page 242*
- *Billto File - Tax Exemptions on page 243*
- *Chart of Accounts File on page 244*

Avalara Customer Usage Type

After Avalara has been activated, via SET 3, the file **Avalara Customer Usage Type** is displayed in File Management.

Code	Description
A	Federal government (United States)
B	State government (United States)
C	Tribe / Status Indian / Indian Band (both)
D	Foreign diplomat (both)
E	Charitable or benevolent org (both)
F	Religious or educational org (both)
G	Resale (both)
H	Commercial agricultural production (both)
I	Industrial production / manufacturer (both)
J	Direct pay permit (United States)
K	Direct mail (United States)
L	Other (both)
M	Not Used
N	Local government (United States)
O	Not Used
P	Commercial aquaculture (Canada)
Q	Commercial Fishery (Canada)
R	Non-resident (Canada)
S	Customer defined description XX

The file comes with 18 pre-loaded entries; as shown above. The **Codes (A-R)** cannot be changed. However, the descriptions can be updated.

These codes determine if an order or order line is tax exempt.

To create a new record, click **Records** and then select **Create**.

Create Record

* Code: T

* Description: Town of Cary

Create

Note: Duplicate codes are not allowed.

Keep in mind that the new code also needs to be included in the Avalara portal.

Item File - Navigator File Management

The **Product Tax Code** setting has been added to several Item File windows.

The Product Tax Codes are established by Avalara and accurately represent the type of item.

Note: For a complete listing of all the Product Tax Codes, refer to <http://taxcode.avatax.avalara.com>.

Item Create and Update windows

Update Record

Manufacturer: SAI Color: 1090 Pattern: 0 Options

* Item#: SAI 1090 0

Description 1: GENOVA 5" FLORENCE

Description 2: 1/2"X34.45SFXML HICKORY

General Pricing Packaging IWMS

ABC Rating: A

Commodity Level: 1

Days Before Old: 180

Remnant Size: 16

Cost Center: CER

Freight Class: CT

Taxable: A

Smallest Pick UM: PC

Smallest Sales UM: CT

Qty Break Group: T1

Operator Initials: MD

Sub-Serial:

Comments: NO BROKEN CARTONS

Last Changed: 06/28/17

Creation Date:

Sequence# for Catalogs: 013000

Freight Key: W

Deliver/Mfgr Lead Days:

Item Width: 18

Product Tax Code: DC010200

Smallest Supplier UM: CT

Order Entry UM: SF

Qty Break Multiplier: 1

Delete Code:

Update

Filters window

Item Filters

Field	Filter	
<input checked="" type="checkbox"/> Item Class 3		
<input checked="" type="checkbox"/> Deliver/Mfgr Lead Days		
<input checked="" type="checkbox"/> Policy Code 1		
<input type="checkbox"/> Policy Code 2		
<input type="checkbox"/> Policy Code 3		
<input type="checkbox"/> Sub-Serial		
<input checked="" type="checkbox"/> Product Tax Code		
<input checked="" type="checkbox"/> Taxable		
<input type="checkbox"/> Qty Break Multiplier		
<input checked="" type="checkbox"/> Sequence# for Catalogs		
<input checked="" type="checkbox"/> Operator Initials		
<input checked="" type="checkbox"/> Inventory Code		

Save View

Default View

Public Filters (3)

- A02 6128
- Policy and Comp
- SPEC4845

Private Filters (0)

Apply

Billto File - Tax Exemptions

Access the Tax Exemptions via the Options drop down menu.

The screenshot shows the 'Update Record' window for Company 2, Account# 01000. The account name is HARBOR FLOOR, located at 2010 ATLANTIC AVENUE, PO BOX 1234, RALEIGH, NC 27513. The 'Options' dropdown menu is open, showing various settings like Special Instructions, Phone Numbers, and Tax Exemptions, which is currently selected. Other fields include State Tax, Other Tax, SSN/Tax ID, Credit Manager, ABC Rating, Color Code, Guarantee\$, and AR Account#.

The Tax Exemptions for the account display.

State	Customer Usage Type	Exemption	Begin Date	End Date
GA	A	412522221122Z11	06/30/16	07/31/17

This file maintains exemptions by customer, by state or province, with start and expiration dates. If this file is activated, tax exemptions for each order will be checked, based upon the customer account# and the state into which the material is being shipped, or the state assigned to the warehouse from which a will-call is made. If an exemption record is found for that account and state, and the current date is within the start/expiration date span of the exemption, then the order will be considered non-taxable (tax exempt).

The **Customer Usage Type**, in the example above “A”, is validated against the Avalara Customer Usage Types established via File Maintenance. When tax exempt orders are created, this value is used to tell Avalara that the order is tax exempt. For more information, refer to Avalara Customer Usage Type on page 241.

Note: Avalara has to be activated via SET 3 for the Customer Usage Type to display.

Chart of Accounts File

The Charts of Accounts file has been updated to include an Avalara Product Tax Code.

Company	Account#	Account Title 1	Sub Category	Balance Last Year	Balance 2 Years Previous	Product Tax Code
0	10800	EMPLOYEE RECEIVABLE	LO	0.00	0.00	30100
B	99999	INSURANCE		0.00	0.00	
B	10000	CASH ON HAND / PETTY CASH		600.25	600.00	

This code is crossed referenced when assessing miscellaneous charges, entered via message lines in order entry, to activate Avalara tax calculations.

Message Lines and Miscellaneous Charges Reference#: 2048334

	Message Lines and Miscellaneous Charges	Price	Cost	GL Account#	Cost Center	Taxable?	Delete Line?
11	UPS CHARGE	11.00		30100		<input checked="" type="checkbox"/>	<input type="checkbox"/>
12						<input type="checkbox"/>	<input type="checkbox"/>
13						<input type="checkbox"/>	<input type="checkbox"/>
14						<input type="checkbox"/>	<input type="checkbox"/>
15						<input type="checkbox"/>	<input type="checkbox"/>
16						<input type="checkbox"/>	<input type="checkbox"/>
17						<input type="checkbox"/>	<input type="checkbox"/>
18						<input type="checkbox"/>	<input type="checkbox"/>
19						<input type="checkbox"/>	<input type="checkbox"/>

Line#: Go

When in create or update mode, the **Product Tax Code** is available for any companies that Avalara has been activated.

Update Record Company: 0 Account#: 01530

* Company: 0 DANCIK DISTRIBUTION, LTD.
 * Account#: 01530

Titles:

Comments:

Main Category: A Sub Category:

Hold This Acct: Purchasing Acct: N

Product Tax Code:

Date	Debit	Credit	Balance
Bal Fwd:	0.00	0.00	0.00
01/17:	0.00	0.00	0.00
02/17:	0.00	0.00	0.00
03/17:	0.00	0.00	0.00
04/17:	0.00	0.00	0.00
05/17:	0.00	0.00	0.00
06/17:	0.00	0.00	0.00
07/17:	0.00	0.00	0.00
08/17:	0.00	0.00	0.00
09/17:	0.00	0.00	0.00
10/17:	0.00	0.00	0.00

Order Management

When creating an order, the system checks to see if the account has any associated tax exemptions. If there are, the **Taxable** setting is set to **No** and the following settings are populated.

The screenshot shows the 'Edit Header' form with the following data:

Reference#: 2049688	Project: []	Architect: []
Job Quote#: []	Mfr Order#: []	
Mfr Invoice#: []		
Order Date: 06/28/17	Enter Date: 06/28/17	
PO#: []	Salesperson 1: []	
Job Name: []	Salesperson 2: []	
Ship Date: 06/30/17	Branch: RAL DANCIK INTERNATIONAL	
Ship Via: OT OUR TRUCK	Warehouse: RAL DANCIK INTL / RALEIGH KCS	
Initials: GB GARY BRANNEN	Supplier: 001 STOCK	
Order Type: [] REGULAR ORDER (BLANK CODE)	Taxable: N	
Order Handling: 1 FILL/KILL	Customer Usage Type: I I - INDUSTRIAL PRODUCTION / MANUFACTUREI	
Reason Code: [] BLANK	Tax Exempt ID: 412522221122Z11	
Job#: []	Reason: SALE IS FOR CHARITY BASED ORG	
FOB: W WAREHOUSE	Terms: 2 2% 10TH PROX NT3010TH NEXT MTH	
Truck Route: AA ATLANTA SW DAILY	Terms Disc%: 0.00	
Truck Stop#: []	Terms Days: 0	
Truck Run#: A		
Cust Price List: LP LIST PRICES	Xref Order#: []	
HndChrg/Disc%: 0.00	Xref Invoice#: []	
Extra Charges: L APPLIED AT LINE ITEM LEVEL		
ETA Date: []	Use Floor Plan?: N	
Measure: []	FP Account#: []	

Customer Usage Type - This is the value created and maintained via the Avalara Customer Usage Type in File Management.

Tax Exempt ID - This number is pulled in from the Tax Exemptions Table (Menu option SYS 605).

Reason - A reason is mandatory for nontaxable orders. The reason gets included on the notepad of the order. If a tax exemption record is found and Taxable is set to N the Reason field is not required. It is only required when the Taxable option is changed. Essentially, switching back and forth between taxable and non taxable requires a Reason to be entered.

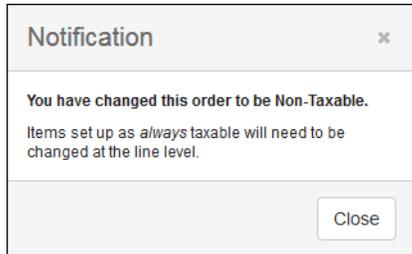
Notes

- If there are no Tax Exemptions set up for the account, the order can manually be made nontaxable. The **Customer Usage Type**, **Tax Exempt ID** and **Reason** settings have to be manually entered.
- If the **Taxable** setting is “Y” the settings become inactive.

Always Taxable Items

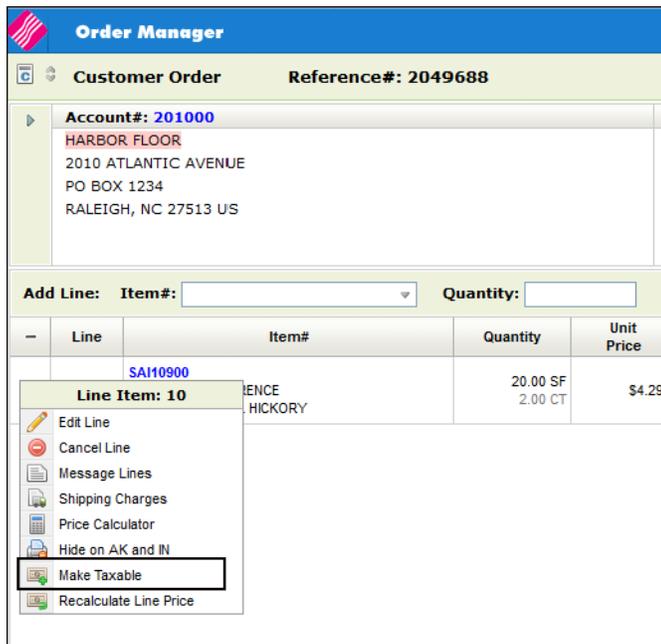
Items can be made always taxable in the Item File.

If you change an order to nontaxable that contains order lines with always taxable items, you will receive the following Notification.



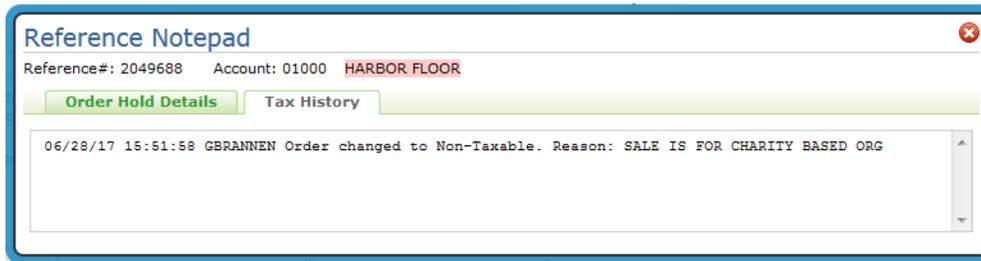
Click **Close** to return to the order.

The tax status of the line can be changed by clicking the line options arrow and selecting Taxable/NonTaxable.



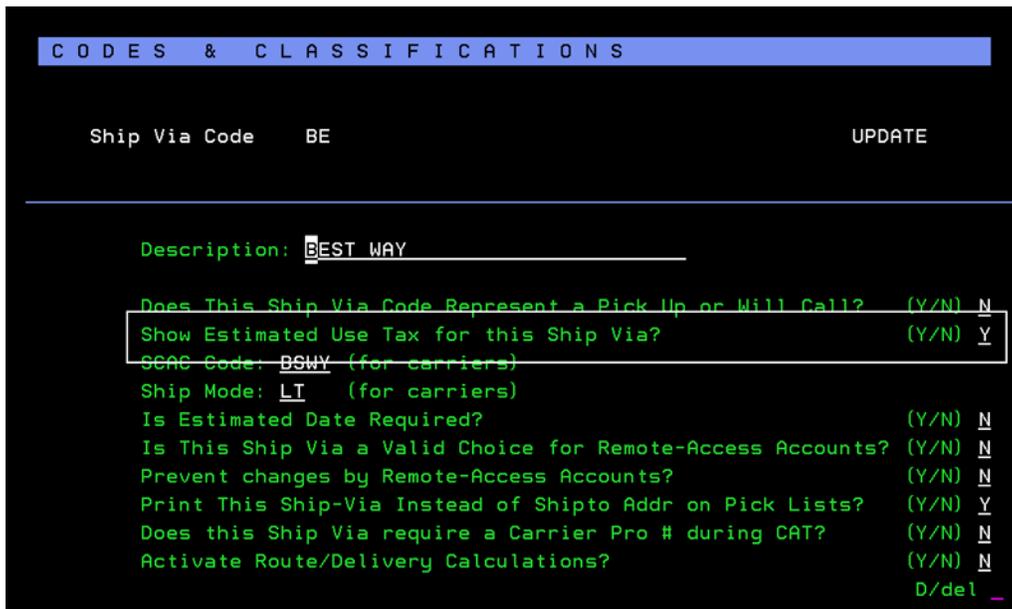
Order Notepad

Changes to an Order's or Order Line's taxable status are noted under the **Tax History** tab in the order's notepad.



Use Tax Calculation

The existing Ship Via Classifications setting (FIL 19) **Show Estimated Use Tax for this ship via** is used to control whether Use Tax should be calculated for order instead of Sales Tax.



When set to Y, and the corresponding ship via assigned to an order, Avalara calculates the Use Tax for the entire order. When set to N, Avalara calculates Sales Tax.

Note: The setting cannot be changed if there are active orders that use the Ship Via.

Credit Manager

A new Tax Exemptions heading has been added under the More tab in the Customer Information section. The Avalara Tax Usage code is displayed. This provides the same functionality found in the Billto File - Tax Exemptions screen.

1. Click a line on the Dashboard.
2. Click **Customer Information**.

3. Click **More**.
4. Click **Tax Exemptions**.

Credit Manager

Dashboard Harbor Floor (#201000)

ACCOUNTS RECEIVABLE CUSTOMER INFORMATION OPEN ORDERS SALES SHIPTO

More

Marketing Programs Display Types Salespersons Price Exceptions Tax Exemptions

Update

State	Usage Type	Exemption	Begin Date	End Date
GA	A - Federal government (United States)	412522221122Z11	06/30/16	07/31/17

Billto

Contact Information

Special Instructions

Notepad

More

Barcodes Added to Packing List for Customer Pref Item and Qty Shipped (Spec 5386)

Date Released: July 2017

Modules: Laser Printer Packing List, Navigator Customer Preference File

Description: Packing list now contain the following fields in both plain text and barcode: PO Number Qty Shipped, Customer Item Number (which comes from the customer preferences file).

Reason for Change: enable scanning of bar codes into the electronic warehouse management system, to receive material into inventory with a minimum of difficulty.

Set-up

System Wide Setting - Packing List Consolidation Level & Print Options

Two new settings have been added.

```
UPDATE System Wide Settings Maintenance
Packing List Consolidation Level & Print Options

Select the level: (L) Line (S) Serial Number (I) Item .....
Do you want weight to print for each detail line? ..... (Y/N) N
Do you want the second line of item description to print? ..... (Y/N) Y
Do you want to skip lines between detail lines? ..... (Y/N) N
Enter the order status codes representing shipped items: OLAXSTR
Note: Order Lines at any other status than those entered above will be
shown as Back Ordered if included on Packing Lists.
Enter the number of default laser Packing Lists to print ..... 2
Note: This is the number of laser Packing Lists that will print per
spooled file. (Min=1; Dft=2; Max=9)
Change order status to _ when packing slip prints from the warehouse
shipping reports.
Adhere to W* on message lines to not print them on Packing List..... (Y/N) N
Suppress printing Collect $ on Packing Lists ..... (Y/N) N
Print barcode for customer's item number..... (Y/N) Y
Print barcode for quantity shipped..... (Y/N) Y

Enter F7=E0J F8=Previous Screen
```

User Web Control Panel

Page 3 is where a Laser Printer is designated for Packing Lists.

```

5/31/17      User Web Control Panel File Maintenance      FM3002RD
14:49:27    Inventory, Warehouse & Printing Options           QPADEV000V
                                                    PAGE 3
-----
User . . . . . : GBRANNEN                                Update
                Prt  Form
                ID   Code
Print Orders on . . . . . : _ ? L   DFT Inventory Screen Type . : 6 ?
Print P/Os on . . . . . : _ ? _   Enabled for Barcode Scanning?: N Y/N
Print Invoices on . . . . . : P9 ? ?   R/F Code for Work Station . : _ ?
Print Credit Held on . . . . . : ?   Work Station Type . . . . . : _ ?
Print Packing Lists on . . . . . : P9 ? L   Inventory Inquiry Type Codes.: 5 ?
Print Checks on . . . . . : _ ? - ?
Print Cash & Carry Labels on : _ ?
Price On Pick/Pack Lists . . : N Y/N/C
Auto-Print PO Date Change Rpt: N Y/N
On Printer . . . . . : _ ?
Allow "Other Ref#" . . . . . : N Y/N
If "Y" use label . . . . . : _____
Default Spool file action . . : _ 1=Leave,2=Print,3=Hold,4=Delete
Prompt for Signature at Time of Print . . . . . : N Y/N
  
```

Path to User Web Control Panel File Maintenance: *NAV 5>Y - Web Control Panel>F11 to access page 3.*

Customer Preference File

Use this file to set up a cross reference file of the customer's own item numbers. This cross reference file can then be used in Order Entry and printed on packing lists.

Ensure the setting **Does this account use their own item codes** is activated.

The screenshot shows the 'Update Record' window for Account 201000. The 'Options' dropdown menu is open, and the 'Does this account use their own item codes?' setting is highlighted with a black box and set to 'Y'. Other settings include 'Preferred UCC/EAN-128 Label Format' set to 'LAM', 'Does this account use their own price class descriptions?' set to 'Y', 'Does this account require conversion to their own UM?' set to 'Y', 'Does this account have special rolled goods requirements?' set to 'Y', 'Send all invoices EDI. Disable printing invoices?' set to 'Y', 'Does the customer require Order-level, Pallet-level or No ASNs?' set to 'N', 'Number of UCC-128 labels required on each pallet' set to '0', 'Number of copies of printed invoice to regular address' set to '1', 'Number of copies of printed invoice to store if applicable' set to '0', 'Consolidate multiple invoices into single PDF for ODS?' set to 'Y', 'Print customer item description on invoice instead of item file desc?' set to 'Y', 'Default Invoice Split Code (affects sorting of invoices)' set to 'Y', 'Does this customer require pre-shipment notification?' set to 'Y', 'Does this customer/chain use special customer/item level messages?' set to 'N', and 'Customer Currency Code for invoices' set to 'Y'. An 'Update' button is visible at the bottom.

Customer items are cross referenced via the **Item** option accessed via the **Options** drop down menu.

The screenshot shows the 'Update Record' window for Account 201000. The 'Options' dropdown menu is open, and the 'Items' option is selected. Other settings include 'Preferred UCC/EAN-128 Label Format' set to 'LAM', 'Does this account use their own price class descriptions?' set to 'Y', 'Does this account require conversion to their own UM?' set to 'Y', 'Does this account have special rolled goods requirements?' set to 'Y', 'Send all invoices EDI. Disable printing invoices?' set to 'Y', 'Does the customer require Order-level, Pallet-level or No ASNs?' set to 'N', 'Number of UCC-128 labels required on each pallet' set to '0', 'Number of copies of printed invoice to regular address' set to '1', 'Number of copies of printed invoice to store if applicable' set to '0', 'Consolidate multiple invoices into single PDF for ODS?' set to 'Y', 'Print customer item description on invoice instead of item file desc?' set to 'Y', 'Default Invoice Split Code (affects sorting of invoices)' set to 'Y', 'Does this customer require pre-shipment notification?' set to 'Y', 'Does this customer/chain use special customer/item level messages?' set to 'N', and 'Customer Currency Code for invoices' set to 'Y'. An 'Update' button is visible at the bottom.

Use the window that appears to cross reference customer item numbers.

Our Item	Their Item	Pref Flag	Their UM	Their Policies
ABCKASA1000	KASITEM1000	Y	CT	I1 I2 I3
Description 1: KAS'S DESCRIPTION 1				
Description 2: KAS'S DESCRIPTION 2				
ABCKASA3000	KASITEM1000	Y	LB	
Description 1: TEST1				
Description 2: TEST2				
AMTMLCE	AMT-DOL12X12LAVARE			
Description 1:				
Description 2:				
ARM68281401	ARM-68281-12			
Description 1: HARBOR CAMBRAY VINYL 12'				
Description 2:				
REX1119CHG	REX-1119H		PC	
Description 1: HARBOR ECHI PASS				
Description 2:				

Save

If the setting **Does this account use their own item codes** is set to “Y” and the item is setup, print the customer’s item number as a barcode.

If the setting **Does this account use their own item codes** is set to “Y” and the item has a customer’s UM entered, convert the quantity shipped to this UM and print the barcode of the converted quantity shipped.

If the item does not have a customer’s UM entered, print the barcode of the standard quantity shipped.

Printing Packing List

Packing list can be printed from the warehouse reports and from order inquiry.

Warehouse Reports

Warehouse Reports

Report Builder

Please select an available report

Customer Reports	Transfer Reports
Load Sheets	Load Sheets
All Aboard Report	All Aboard Report
Manifest	Manifest
Bill of Lading	Bill of Lading
Open Order Worksheet	Open Order Worksheet
Packing List	Packing List
Print by Manifest Number	

Order Inquiry

Order Manager

New Order Reference#: Submit Order#:

Order Search by: Processed Unprocessed

Order Date	Order#	Reference#	Name
05/01/17	417519	2047783	HARBOR FLOOR
05/01/17	417520	2047784	A+ TILE
05/01/17	417521	2047785	A+ TILE
05/01/17	417522	2047786	A+ TILE
05/01/17	417523	2047787	A+ TILE
05/01/17	417524	2047797	GALLERY FLOORING
		2047799	DAVID ANDERSON
		2047800	A+ TILE
		2047806	GALLERY FLOORING
		2047812	A+ TILE
		2047813	A+ TILE
		2047819	HARBOR FLOOR
		2047821	A+ TILE
05/02/17	417535	2047829	HARBOR FLOOR

Available Options

- Go To Order
- View Order Header
- Order Status
- Print**
- Print Preview
- Add Task
- New Credit/Adjustment

Available Print Options

Reference#: 2047799 Order#: 417526 Account: 277777 DAVID ANDERSON

Select one of the following options:

Options

- Print order as pick list
- Print order as pick list and acknowledgement
- Print order as acknowledgement only
- Print picking labels
- Print partial pick list
- Print packing list**

Submit

Customer Relationship Management (Spec 5422)

Date Released: July 2017

Modules: Navigator Customer Relationship Management Application

Description: Add a new Navigator application.

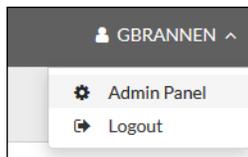
Administration Panel on page 254

Working with the Customer Relationship Management Application on page 263

Administration Panel

Use the Admin panel to set-up users and to establish parameters used when creating accounts and opportunities.

1. The Admin panel is accessed by clicking on the user name in the upper right hand corner and selecting **Admin Panel**.

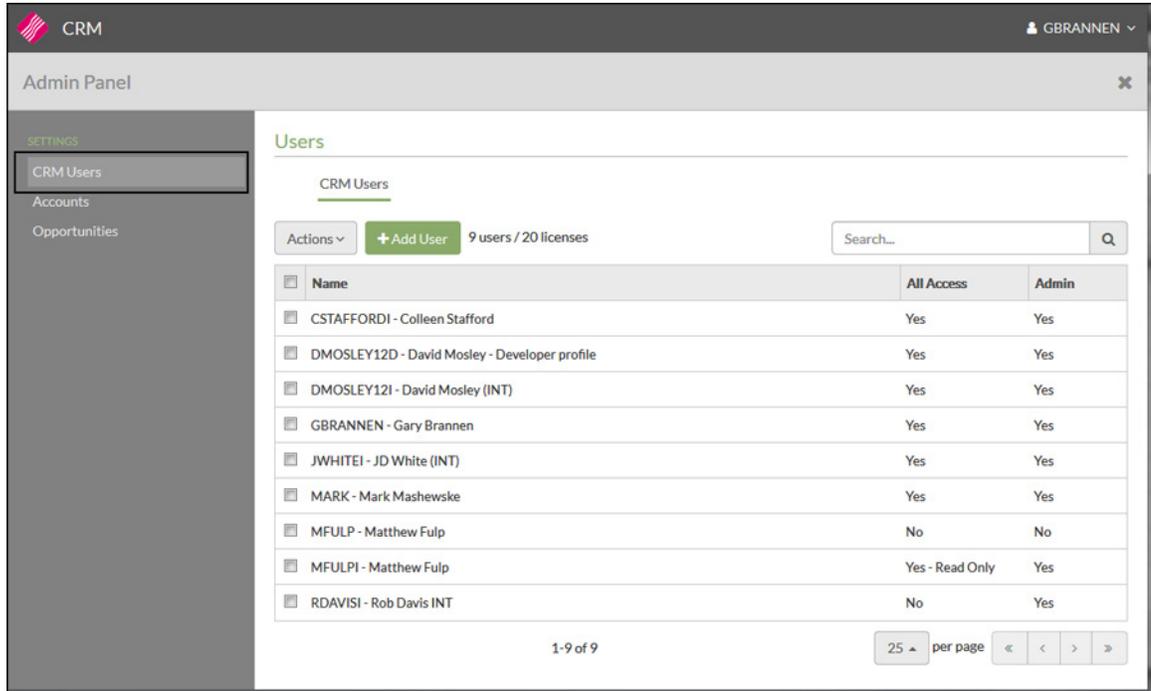


- *CRM Users on page 255*
- *Accounts on page 257*
- *Opportunities on page 259*
- *Job Quotes on page 261*

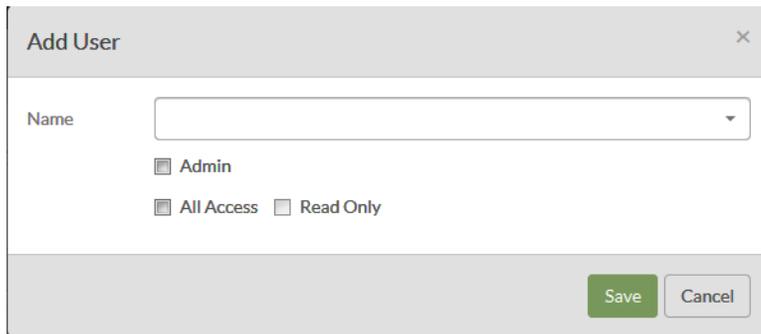
CRM Users

Adding Users

1. Click **CRM Users**; located on the left hand side of the window.



2. Click **Add User**.



- **Admin** - Selecting this grants the user access to the Admin Panel.
- **All Access** - These users can access all of the information and make some changes; such as adding. This option grants edit/update access to the Account, Contacts and Opportunities information regardless of whether they created or are the owner of the information.
- **Read only** - Can only view the information. This option grants viewing access to the Accounts, Contacts, and Opportunities created by any user. However, they can only edit Accounts, Contacts, and Opportunities that they have created or have been assigned as the Owner.

Not selecting any of these options means that the user is a standard CRM user with the following access:

- Accounts: Has access to view all Accounts created by any user, but can only edit Accounts that they have created or have been assigned as the Owner.
- Contacts: Has access to view all Contacts created by any user, but can only edit Contacts that they have created or have been assigned as the Owner.
- Opportunities: Only has access to view or update Opportunities that they have created or have been assigned as the Owner. They cannot see Opportunities created by other users.

Deleting Users

Select a user and then select **Delete** under the **Actions** button.

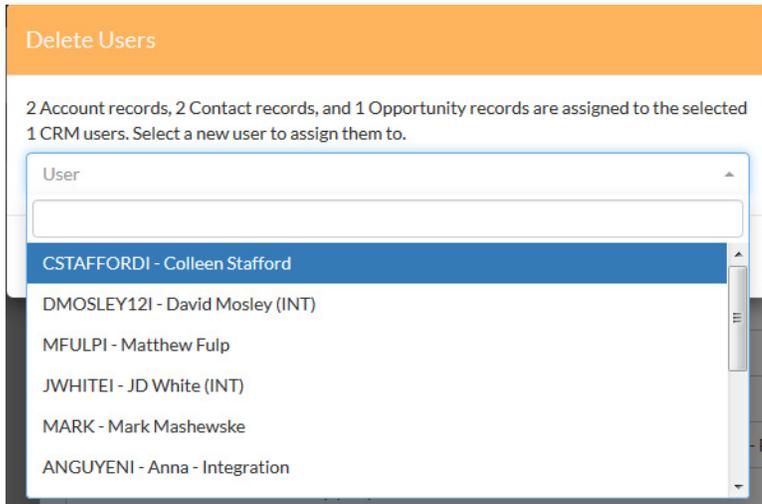
The screenshot shows the CRM Admin Panel with the 'CRM Users' section active. A table lists users with columns for checkboxes, names, 'All Access', and 'Admin' permissions. The user 'GBRANNEN - Gary Brannen' is selected, and the 'Delete' button in the 'Actions' dropdown is highlighted.

		All Access	Admin
<input type="checkbox"/>	ANGUYENI - Anna - Integration	No	No
<input type="checkbox"/>	BMAYOI - Bob Mayo	No	No
<input type="checkbox"/>	CSTAFFORDI - Colleen Stafford	Yes	Yes
<input type="checkbox"/>	DHUNT - David Hunt	Yes - Read Only	Yes
<input type="checkbox"/>	DMOSLEY12I - David Mosley (INT)	Yes	Yes
<input checked="" type="checkbox"/>	GBRANNEN - Gary Brannen	Yes	Yes
<input type="checkbox"/>	JWHITEI - JD White (INT)	Yes	Yes
<input type="checkbox"/>	MARK - Mark Mashewske	Yes	Yes

If the user being deleted has CRM information; such as contacts and opportunities, assigned to them, the following warning appears.

The dialog box has an orange header 'Delete Users'. The message reads: '2 Account records, 2 Contact records, and 1 Opportunity records are assigned to the selected 1 CRM users. Select a new user to assign them to.' Below the message is a dropdown menu with 'User' selected. At the bottom right are 'Delete' and 'Cancel' buttons.

Use the User drop down listing to select a new user to assign the information to.



If the user is not assigned to any accounts, contacts, opportunities or job quotes, you can click Delete to remove the user from CRM.

Accounts

1. Click **Accounts**.

2. Add or edit the **Industry** and **Type** of account.

The screenshot shows the CRM Admin Panel with the 'Accounts' section selected. The 'Custom Values' section is expanded to show 'Industry' and 'Types' settings. The 'Industry' section is titled 'Edit Industry' and contains a list of values: 'Construction dsalfj asdfij jalsflsadjfsdlafj dsalfdsalkfjdsaf', 'Education', 'Government', and 'Industrial'. There is an '+Add Value' button and 'Save' and 'Cancel' buttons. The 'Types' section is titled 'Edit Types' and contains a list of values: 'Builder', 'Contractor', 'New Type.2', and 'Sub Contractor'. There is an '+Add Value' button and 'Save' and 'Cancel' buttons.

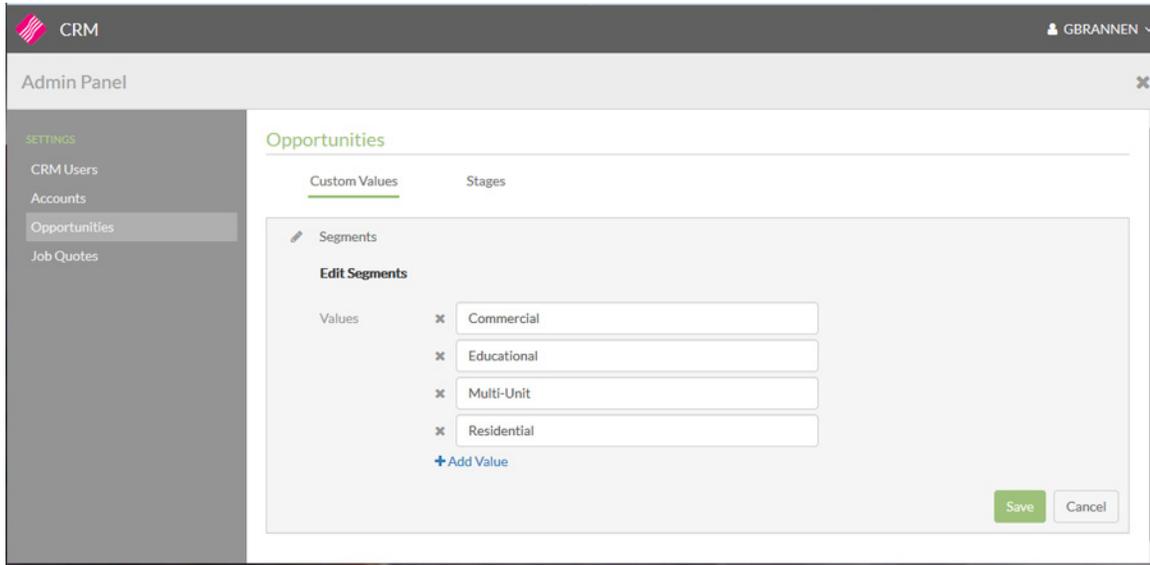
These values are used when creating new accounts.

The screenshot shows the CRM 'New Account' form. The 'Account Information' section includes fields for 'Account Name*', 'Parent Account', 'Main Phone', 'Main Fax', and 'Website'. The 'Additional Information' section includes fields for 'Owner' (set to 'GBRANNEN - Gary Brannen'), 'Status' (set to 'Active'), 'Type', 'Industry', 'Annual Revenue', 'No. of Employees', 'BillTo Association', and 'D&B'. A red box highlights the 'Type' and 'Industry' dropdown menus.

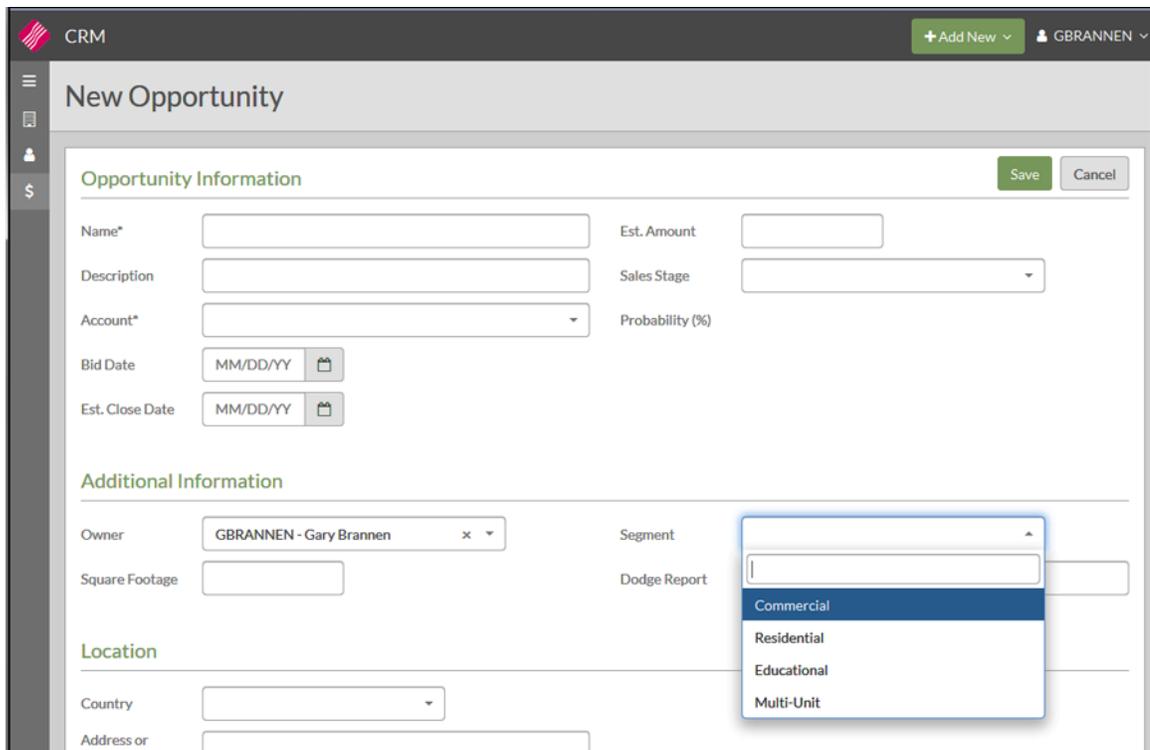
Opportunities

This part of the admin panel allows you to define the Segments and Sales Stages used when creating or editing Opportunities.

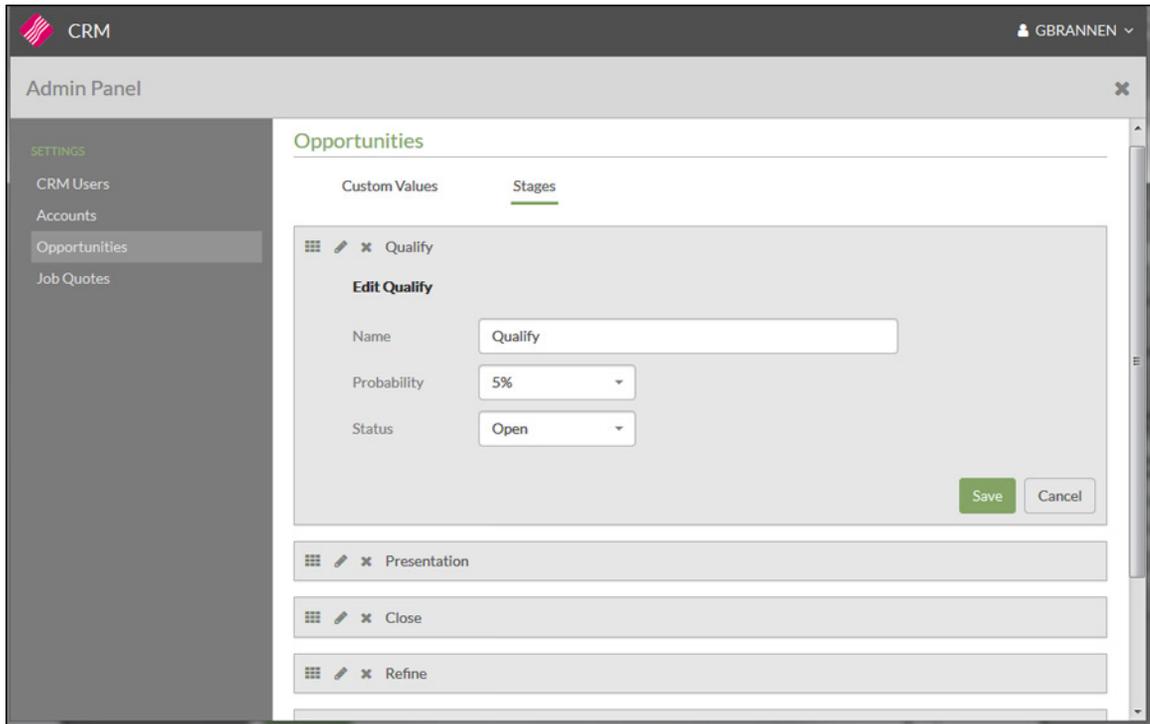
Segments



These segments populate the drop down menu when creating or editing Opportunities.



Stages



The listed stages can be moved up or down in the listing by dropping and dragging them.

The **Probability** directs where the stage appears on the Opportunities window. The lower the number (the lowest is 0) the more toward the beginning of the sales cycle the stage is placed.

Note: Probability can be incremented by 5%.

