

Allow User to Change Branch During Order Creation

Date Released: March 2017

Modules: Navigator Order Management

Description: Create a NAV 1, 2, and 5 setting that controls whether a user is able to change the Branch value in Customer Orders, Quotes, and Credit Orders.

Reason for Change: When the retail environment is enabled, customers need a way to control whether or not a user can update the Branch.

Restrictions: Navigator Order Management customer orders, direct ship, quotes, and credit orders.

Note: Purchase orders and stock to stock orders do not adhere to this functionality.

Associated Files

Control User File Maintenance (NAV 5) - Y=Web Control Panel

Users are assigned to the retail environment via the **Y=Web Control Panel** option on users Control File (NAV 5).

```
3/01/17          Control User File Maintenance          FM3010R@
15:56:04                                               QPADEV0015

  Opt User      Email Address          Dft Navigator
                               Init  Auth Class
-----
  GBRANNEN
  Y GBRANNEN    gbrannen@dancik.com      GB  *ALL
  I WMSI2D
  J JBONTKEI    jbontke@dancik.com      JB  *ALL
  J JCARTERI
  J JFIDELMANI
  J JGULAS      jgulas@dancik.com       BO  *ALL
  J JGULASID
  J JGULAS2
  J JLASSITERI  jlassiter@dancik.com    JL  *ALL
  J JOE
  J JWHITEI    jwhite@dancik.com       JW  *ALL
  J KRAPERI    kraper@dancik.com       KR  *ALL
  J LSMITHI    lsmith@dancik.com       LS  *ALL
                                     More...

Options ==> C=Copy  D=Delete  I=Inquire  U=Update  W=Web Access
              Y=Web Control Panel  Z=Send Alternate Password Email
F7=Exit  F8=Password
```

The setting to activate the Retail environment is found on the second page of settings.

```
3/01/17      User Web Control Panel File Maintenance      FM3002RC
16:04:41      Order Entry & Invoicing Options                  QPADEV0015
                                                    PAGE 2
User . . . . . : GBRANNEN                          Update
Allow Order If Qty Not Avail : Y Y/N/X      Invoicing Default B/O Code : _ 1/2
Allow Order Desk To Invoice  : Y Y/N          Invoicing Status Codes . . : ____
Retail Environment . . . . . : Y Y/N          JobName Mandatory on O/E:   N Y/N/X
Cash Register Screen . . . . : Y Y/N          Charge Tax On Freight. . . : N Y/N
Variable Charge Field . . . . : _ ?           Auto-Transfer. . . . . : N Y/N
Tax Variable Charge . . . . . : N Y/N/C      Length Control, in Inches. : 120
General Ledger# . . . . . : ____           Min Deposit on Cash Reg Scr: 25 %

Auto-ISO Option . . . . . : M Y/N/M
ISO Border Color . . . . . : _ B/G/P/R/T/W/Y
Line or Window . . . . . : _ L/W

Mandatory To Key Description/Reason For Order Change Or Cancellation: N Y/N
Mandatory To Have Valid Non-Blank Order Handling Code On All Orders : N Y/N
Allow A Price Override To Bypass Error Message On "Locked Out" Items: Y Y/N
Auto-Display Bill-Of-Material Windows on Order Entry . . . . . : Y Y/N

F1=Next Record  F6=Return  F7=Exit  F11=Page 3
Press ENTER to accept modifications being made...
```

Granting Access

Authorization for changing the Branch in Order Management can be granted at the global level (NAV 5), authority class level (NAV 2) or at the user level (NAV 5).

Enter an “A”=App Options/Permissions in the Opt field for Order Management.

```
3/02/17          NAVIGATOR          NV5000R
9:01:53          Application Global Defaults      QPADEV0010

Opt  Web App Description
)   Accounting
)   Contact Manager
)   Credit
)   File Management
)   Installations
)   Inventory
)   Invoicing
)   Order Management
)   ODS
)   Reporting
)   Sales Portal
)   Spartan Surfaces
)   Warehouse

Bottom

Options ==> A=App Options/Permissions
F7=Exit  F10=Navigator Options/Permissions  F11=External Links
```

Activate the new settings as needed.

```
3/02/17          NAVIGATOR          NV30010M
9:05:54          Work with Application Permissions      QPADEV0010

Application .....: Order Management
Level (Global) .....:

Access
Y/N  Permission Description
)   Allow splitting commissions
)   Allow credits and adjustments
)   Allow Price Calculator
)   Allow Price Overrides
)   Allow change to branch at order creation when Retail Environment = N
)   Allow change to branch at order creation when Retail Environment = Y
```

Allow change to branch at order creation when Retail Environment = N - Set to “Y” to allow a user to change the Branch at time of Customer Order, Direct Ship, Quote, or Credit Order creation when the Retail Environment is *not* activated.

Allow change to branch at order creation when Retail Environment = Y - Set to “Y” to allow a user to change the Branch at time of Customer Order, Direct Ship, Quote, or Credit Order creation when the retail environment is activated.

Branch changes are made on the Order Header. If the user is not allowed to edit the branch the Branch field is grayed out.

Edit Header

Reference#: 2044753

Account#: 000100 A & A CERAMICS, INC. 1300 "MALL DRIVE" APT "N" 43 BENTON HARBOR, MI 49022 (616) 927-6000	Ship To: A & A CERAMICS, INC. 1300 "MALL DRIVE" APT "N" 43 BENTON HARBOR, MI 49022 (616) 927-6000
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Order Date: 02/15/17 PO#: Job Name: Ship Date: 02/15/17 Ship Via: Initials: PI	Enter Date: 02/15/17 Salesperson 1: ARM ARMSTRONG WHOLESALERS Salesperson 2: OTHER / MISCELLANEOUS Branch: RAL DANCIK-ON-DISK / RALEIGH Warehouse: RAL DANCIK INTL / RALEIGH KCS Supplier: 001 STOCK
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Order Type: REGULAR ORDER (BLANK CODE) Order Handling: 1 FILL/KILL Reason Code: BU BUILDER Job#:	Other Tax: Tax Exempt ID:
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FOB: Truck Route: Truck Stop#: Truck Run#:	Terms: Terms Disc%: 0.00 Terms Days: 15
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Cust Price List: A2 ARCHITECTURAL - LEVEL 2 HndlChrg/Disc%: 5.00 Extra Charges: L APPLIED AT LINE ITEM LEVEL	Xref Order#: Xref Invoice#:
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