

# Navigator OM now Adheres to the Customer Preference File (Spec 4709)

**Date Released:** July 2017

**Modules:** Navigator Order Management

**Description:** Adds an icon to Navigator Order Management to display the Customer Preferences.

**Reason for Change:** Brings the green screen F19 order review function into Navigator. This functionality reviews an order from your customer's point of view; for customers that have their own item numbers and/or UM requirements. This review, as opposed to the normal review, shows the customer's item numbers and descriptions and also converts the UM quantities and prices as specified in the Customer Preferences File. This review screen will also consolidate lines that may have been split by ISO, so that the read back to the customer is exactly as the customer placed the order.

## Set-up

### Customer Preference File

The setting **Does this Account use their own item codes** has to be activated.

The screenshot shows a software window titled "Update Record" for Account: 201000. It contains a list of settings for a customer preference file. The setting "Does this account use their own item codes?" is highlighted with a black box and has a dropdown menu 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 "N", "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 "N", "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 "1", "Does this customer require pre-shipment notification?" set to "N", and "Does this customer/chain use special customer/item level messages?" set to "N". An "Update" button is located at the bottom of the window.

Setting	Value
* Type:	A
* Account:	201000
Default Order Handling/Back Order Code	
Purchase Order Number Edit Mask	
Preferred UCC/EAN-128 Label Format	LAM
Does this account use their own item codes?	Y
Does this account use their own price class descriptions?	N
Does this account require conversion to their own UM?	Y
Does this account have special rolled goods requirements?	Y
Send all invoices EDI. Disable printing invoices?	N
Does the customer require Order-level, Pallet-level or No ASNs?	N
Number of UCC-128 labels required on each pallet	0
Number of copies of printed invoice to regular address	1
Number of copies of printed invoice to store if applicable	0
Consolidate multiple invoices into single PDF for ODS?	Y
Print customer item description on invoice instead of item file desc?	Y
Default Invoice Split Code (affects sorting of invoices)	1
Does this customer require pre-shipment notification?	N
Does this customer/chain use special customer/item level messages?	N

# Displaying Customer Preferences

When an account has been activated to display order information using their item numbers and descriptions, an icon appears on the Navigator Order Entry window.

Line	Item#	Quantity	Unit Price	Extended Price	Ware
10	SAI10900 GENOVA 5" FLORENCE 1/2"X34.45SFXML HICKORY	20.00 SF 2.00 CT	\$4.290	\$85.80	RAL

When the icon is clicked, it changes to green and the customer's item number, UM and pricing information displays.

Line	Item#	Quantity	Unit Price	Extended Price	Ware
10	SAI-10900H HARBOR TASTIERA TILE	60.00 PC 2.00 CT	\$1.430	\$85.80	RAL

# Adding Customer Preferences

The customer's information is imported in from the Customer Preference File. Follow this path to access and/or add customer information to items:

- Navigator Customer Preference File
- Use the Option arrow to the left of an Account or Chain to access the update window
- Select Items from the Available Options