

Overview

QAD Adaptive streamlines tasks, making them faster and more efficient. Simple and intuitive for the first time user, the system also offers all the complexity needed by the power user, making your enterprise rapid, agile, and effective. **QAD Adaptive** is a web-based user interface consisting of views, including browses, forms, reports, action centers, and many more capabilities, organized as follows:

- **Base Data** — manages essential, master data needed in common throughout the application, such as Items, Suppliers, Customers, and much more.
- **Customer Management** — manages all phases of the customer life-cycle from acquiring customers, through managing orders, pricing, and fulfillment.
- **Manufacturing** — provides tools for planning, scheduling, cost management, material control, shop floor control, and reporting in a variety of manufacturing environments.
- **Supply Chain** — supports supply networks with the ability to drive margin and cost improvements, reduce lead times, increase inventory turns, and meet industry compliance.
- **Financials** — provides complete control and immediate information on any aspect of the organization's finances.

For information about the QAD Adaptive Security module, refer to the [QAD Security Administration Guide](#).

QAD Adaptive offers extensive capabilities for actionable insights with Action Centers and their KPIs, and the agility to extend functionality with the QAD Enterprise Platform.

To get started, see: [Getting Started on page 217](#).

What's New

QAD Adaptive transforms the QAD user experience, improving business outcomes through more effective users, processes, and decision making. **QAD Adaptive** provides an intuitive, engaging, and flexible user interface that optimizes and streamlines tasks while offering clear visual insights into business data. QAD Adaptive also includes the QAD Enterprise Platform, which provides the underlying architecture with a set of agile, rapid response technologies.

Release Notes

For a summary of new features in this release, see the [release notes](#) located in the [QAD Document Library](#).

Getting Started

Here's how to get started with the QAD Web UI.

- [Recommended Browsers on page 218](#)
- [Signing In on page 219](#)
- [Setting Your Home Page on page 220](#)
- [Tablet Usage Guidelines on page 221](#)
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- [Guide Me on page 228](#)
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To learn more about QAD, see:

- [QAD Adaptive Mobile App on page 236](#)
- [QAD Learning Center on page 237](#)
- [QAD Support Center on page 238](#)
- [QAD Document Library on page 239](#)

Recommended Browsers

The user interface is only supported on current versions of Chrome and Safari web browsers. Although other web browsers can be used, you may experience differing levels of performance and user experience.

To make sure you have the latest security updates, browsers such as Chrome and Safari can be updated automatically by Google or Apple.

For tablet use, the user interface is only supported on iPad Pro (or newer equivalent) with the Safari web browser. Although other tablets can be used, you may experience differing levels of performance and user experience.

Note Some ad-blocker plugins for browsers can prevent you from seeing data in action centers, the **KPIs** view, the **Action Centers** view, the **KPI Visuals Gallery** view, and the Insights panel. If you are having issues viewing content in these screens even though you have all of the required security and role access, check if there is an ad blocker running. If an ad blocker is running, disable it or add URLs containing "api/analytics" to the list of allowed URLs maintained in the ad blocker.

Signing In

You can access QAD Adaptive from a web browser in the same way that you normally access web pages on the Internet.

Before signing in, check the following:

- Check that your browser accepts cookies and has JavaScript activated.
- Check if your workplace has Internet rules that restrict access. These rules could block access to QAD Adaptive.
- Contact your system administrator to check if any firewall or proxy settings prevent access to QAD domains.

Sign In to QAD

To sign in, open QAD Adaptive in your browser and enter your username and password. Your username is typically an email address.

If QAD is synchronized to your company's directory service, you can sign in with your company email address and password.

The features you can access depend on your role memberships in the system. The menu options can vary depending on your role.

After signing in, you first see the default home page. You can change the default home page by navigating to any page and setting it as your home page.

Setting Your Home Page

After you sign in, the first page you see is your home page. If this is the first time you have signed in, you will see the default home page.

You can set any page to be your home page by navigating to a page and choosing Set Current as Home from the user options drop-down on the [menu bar on page 242](#).

Tablet Usage Guidelines

Please note the following guidelines for using QAD Adaptive on a touchscreen tablet.

Interaction Guidelines

- For tablet use, the user interface is only supported on iPad Pro (or newer equivalent). Although other tablets can be used, you may experience differing levels of performance and user experience.
- The user interface is optimized for landscape mode: most tablets in portrait mode are not quite wide enough to fit all of our fields and full menu.
- For data-entry tasks, an external keyboard is highly recommended.
 - If using the tablet's virtual keyboard, consider using an alternative keyboard app for improved functionality and view area usage.
 - If using the tablet's virtual keyboard, use the tablet's settings to make the keyboard smaller so that it does not cover too much of the view area.
 - On some tablets, the virtual keyboard can obscure the view area, especially when used in landscape mode.
- On a tablet, views do not offer a hybrid mode where you can simultaneously access browse and form data.
- Configuring views and stored views is best done on a larger desktop or laptop screen.
- Double-click actions are not supported on tablets.
- Hover events are not supported on tablets.
- The browse grouping (Group By) feature is not yet available for tablet use.
- The Design Layout mode for extending forms is not available on tablets. This feature requires more screen area and so is only available for laptop or desktop use.

Although the Surface Pro has a touchscreen, the user interface works on the Surface Pro as it does with regular laptop and desktop devices. These interaction guidelines do not apply to the Surface Pro.

Windows 10 can automatically scale displays by 150% for high-resolution screens. For best results, change the automatic 150% scaling factor to be from 125% to 100%.

Performance Guidelines

On a tablet, for performance reasons, open no more than five levels deep of drill-down modals. If you need to drill down more than five levels deep, open the next drill-down modal in new browser tab.

For high-speed broadband connection performance, the following is recommended:

- Minimum download speed: 16 mbps
- Maximum latency: 150 ms

Terminology Guidelines

Please be aware of the following terminology differences between the QAD .NET UI and the QAD Web UI:

- In the .NET UI, screens for creating, updating, and deleting data typically end with "Maintenance". However, in the Web UI, screens for creating, updating, and deleting data do not end with "Maintenance" but are indicated by the green pencil icon. For example, in the .NET UI, sales orders are managed using Sales Order Maintenance, but in the Web UI, sales orders are managed using the Sales Orders screen.
- On many screens, fields that included "Code", "ID", or "Number" .NET UI do not typically include those terms on Web UI screens. For example, "Item Status Code" in the .NET UI is "Item Status" in the Web UI.

Keyboard Shortcuts

When you need to enter data quickly without the use of a mouse, use these keyboard shortcuts for browses and forms. You can also use many standard web browser keyboard shortcuts.

Note: To access the online help from the Web UI, enter: **Ctrl + I** (*macOS: Cmd + I*).

Browse Keyboard Shortcuts

The following lists keyboard shortcuts you can use with browses.

Browse Keyboard Shortcuts

Action	Keyboard Shortcut
Next record	Up Arrow
Previous record	Down Arrow
Create new	Ctrl + Alt + N <i>macOS: Control + Option + N</i>
Edit	Ctrl + E
Next page	Page Down <i>macOS: fn + Down Arrow</i>
Previous page	Page Up <i>macOS: fn + Up Arrow</i>
Access browse search	Ctrl + G
Select Search button	Enter
Exit advanced search	Esc

Form Keyboard Shortcuts

The following lists keyboard shortcuts you can use with forms.

Form Keyboard Shortcuts

Action	Keyboard Shortcut
Create New	Ctrl + Alt + N <i>macOS: Control + Option + N</i>
Delete	Ctrl + D
Save	Ctrl + S

Action	Keyboard Shortcut
	<p>Saves the form and switches the form button to Save if it was previously Save & Next.</p> <p>You can also save a form record by pressing Enter.</p> <p>Ctrl + Alt + S</p> <p>Saves the form and navigates to the next record. It also switches the form button to Save & Next if it was previously Save.</p>
Cancel	Esc
Undo last action	Ctrl + Z
Redo last action	Ctrl + Y <i>macOS:</i> Cmd + Shift + Z
Copy text	Ctrl + C
Paste text	Ctrl + V
Reload page	Ctrl + R
Next panel	Alt + J <i>macOS:</i> Option + J
Previous panel	Alt + K <i>macOS:</i> Option + K
Next field	Tab
Previous field	Shift + Tab
Clear field	Space bar
Clear date field	Space bar
Select / deselect check box	Space bar
Display selection list on field	Up / Down Arrow
Display calendar picker	Alt + Up / Down Arrow <i>macOS:</i> Option + Down / Up Arrow
Increment selection list by 1	Up / Down Arrow
New form grid record	Ctrl + Alt + N <i>macOS:</i> Control + Option + N

Action	Keyboard Shortcut
	When editing a grid record, you can press Enter to save and create a new grid record, based on “execute next button” logic.
Delete form grid record	Ctrl + Alt + D <i>macOS</i> : Control + Option + N
In hierarchical grids, toggle (open or close) child records	Alt + T
In hierarchical grids, add a child record	Ctrl + Alt + M
Open field lookup	Alt + L <i>macOS</i> : Option + L
Execute next button (highlighted in green)	Enter The button highlighted is context-sensitive. For example, from a form record, press Enter to save the record. From a form grid record, press Enter to save the record and create a new one.
Move focus to next button	Ctrl + Enter
Go to right-hand options (Attachments, Activity, Drill-down Links)	Alt + R
Financials Auto-Balance Calculation	Alt + B

Selecting Next Line, Done, or Cancel on Form Grids

In a single-row edit grid, when done editing a row, you can go to the Next Line, Done, and Cancel buttons by typing Ctrl + Enter, which first puts focus on the Next Line button. You can then use the Tab key to go to the Done and Cancel buttons. To select a button, use the Enter key.

Web Browser Keyboard Shortcuts

Remember that you can take advantage of standard browser keyboard shortcuts. Here are some examples:

Web Browser Keyboard Shortcuts

Action	Keyboard Shortcut
Find text on page	Ctrl + F

Action	Keyboard Shortcut
Reload page	Ctrl + R
Undo last action	Ctrl + Z
Redo last action	Ctrl + Y
Copy text	Ctrl + C
Paste text	Ctrl + V
Clear field	Space bar
Clear date field	Space bar
Toggle checkbox	Space bar
Display selection list on field	Alt + Down Arrow <i>macOS: Option + Up / Down Arrow</i>
Display calendar picker <i>macOS: Option + Up / Down Arrow</i>	Esc
Increment selection list by 1	Up / Down Arrow
Open link in new browser tab (especially useful when selecting menu items from menu search results)	Ctrl + (click) <i>macOS: Control + (click)</i>
Open link in new browser window	Shift + (click)

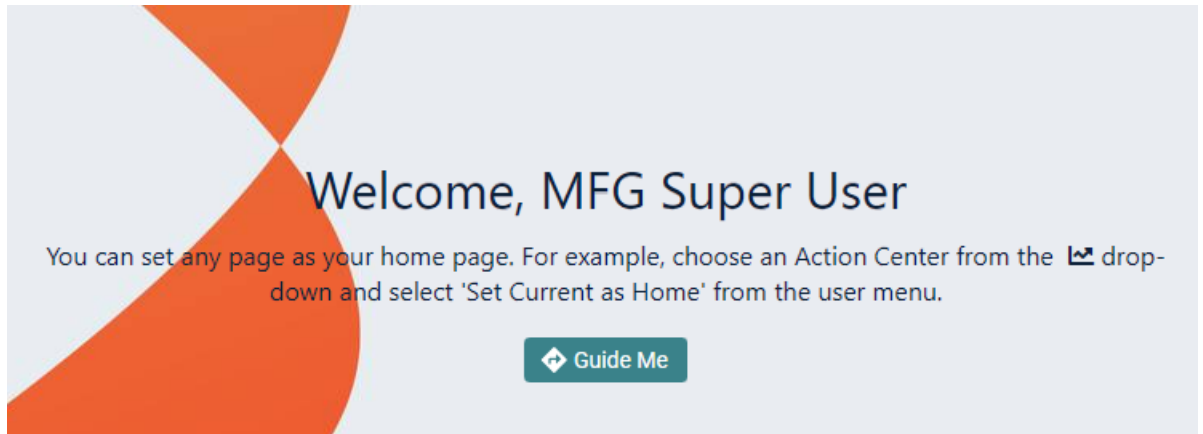
Guide Me

The QAD Web UI now includes Guide Me, on-screen guided assistance to help you quickly get up to speed on QAD Adaptive. The Guide Me menu includes Guide Me workflows, Videos, and Process Maps.

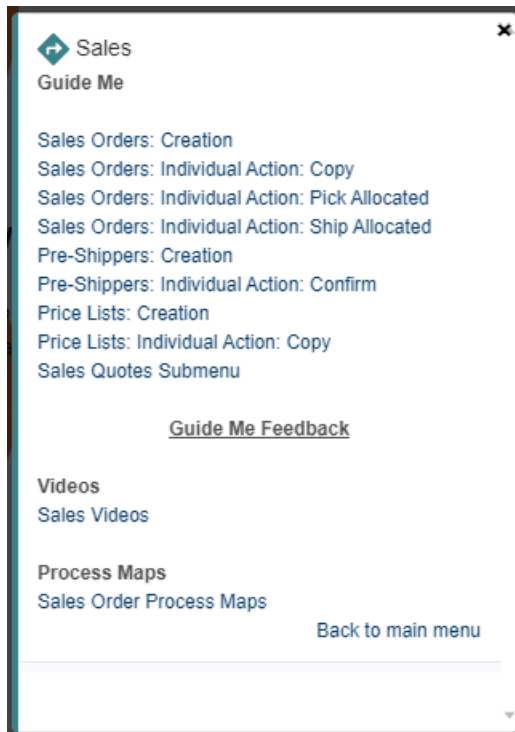
Note Guide Me is only available for Cloud customers.

Important The Safari browser can only support Guide Me when cross-site tracking is enabled. This is a global setting and can compromise privacy. Chrome is the recommended browser for QAD Adaptive.

You can access Guide Me by clicking the icon on the home screen.



Guide Me offers a menu with many workflows to help you get started with learning QAD:



Along with the Guide Me workflows, useful links to videos and process maps are also included.

Click the Guide Me Feedback link from any menu to help request new tutorials and improve existing in-application training.

The experience of using Guide Me can depend on what data you have in your system and on your role permissions.

Training Videos

Many training videos are now available so you can learn more about QAD.

Note The videos listed in this section may refer to older versions of QAD software. For the latest training videos, please visit [QAD Learning Center](#). You can also share your feedback about our videos [here](#).

The video player includes chat and attachment icons along the bottom of the screen. You can click on the chat icon to ask a question about the video, and click on the attachment icon to view a transcript, where applicable.



When you see the video icon, click it to view a training video.

Training videos cover the following topics:

General Features Videos

- [Adaptive UX Basic Functions and Terminology Overview](#)
- [Workspace, User Profile and Favorites](#)
- [Activity Tracking](#)
- [Alerts and Approvals](#)
- [Advanced Search](#)
- [Browses and Reports](#)
- [Browse Export and Report Viewer](#)
- [Keyboard Shortcuts](#)
- [Lookup Definitions](#)
- [Notifications, Activity, Attachments](#)
- [Accessing QAD Action Center App from your Mobile Device](#)

Setting Up Base Data Videos

- [Set Up Address Types, Counties and Countries](#)
- [Set Up Analysis Groups, Generalized Code Groups and Generalized Codes](#)
- [Set Up Attribute Categories, Attribute Definitions, Attribute Valuations and Attribute Profiles](#)
- [Set Up Customer Types, Customers and Customer Ship-Tos](#)
- [Set Up Default Daybook, Master Notes and Use Master Notes in Transactions](#)
- [Set Up End Users, Blocked Transactions and Blocked Customer/Supplier](#)

- [Set Up Item and Supplier Certification](#)
- [Set Up Item Status Codes, Commodity Codes and Fiscal Class](#)
- [Set Up Items, Copy an Item Master and Set Up Item-Site](#)
- [Set Up Language Detail, Reason Codes and Daybook Sets](#)
- [Set Up Sites, Units of Measure, Product Lines and Copying Product Lines](#)
- [Set Up States and Corporate Groups](#)
- [Set Up Supplier Types, Suppliers and Credit Terms](#)

Action Centers Videos

- [Action Centers Overview](#)
- [Analyze KPIs](#)
- [Create KPIs](#)
- [KPI Bulk Actions](#)
- [Financial KPIs](#)
- [Historical KPIs](#)
- [Create Visuals](#)
- [Create Action Center](#)
- [Insights](#)
- [Predefined QAD Action Centers](#)
- [Action Center Permissions](#)

Sales Videos

- [Sales Quotes: Navigation/Overview](#)
- [Sales Quotes: Creation](#)
- [Sales Quotes: Creating Sales Quotes by Copying Sales Quotes](#)
- [Sales Quotes: Individual Release to Sales Order](#)
- [Sales Quotes: Bulk Release](#)
- [Sales Quotes: Up and Cross Selling](#)
- [Sales Quotes: Reprice Action](#)
- [Sales Orders: Navigation/Overview](#)
- [Sales Orders: Create Quick Order](#)
- [Sales Orders: Edit Sales Order](#)
- [Sales Orders: Copy a Sales Order](#)
- [Sales Orders: Pick and Ship](#)

- [Sales Orders: Revalue Cost Action](#)
- [Sales Orders: Allocate Action](#)
- [Sales Orders: Bulk Actions](#)
- [Sales Orders: Enhanced Visibility](#)
- [Sales Orders: Available To Promise \(ATP\)](#)
- [Sales Orders: Global Order Management](#)
- [Global Sales Orders Setup and ATP Visibility](#)
- [Navigating Customer Scheduled Orders](#)
- [Variance Tolerances, Variance Indicators, and the Customer Required Schedule Detail - Active Browse](#)
- [Sales Orders - Price Lists](#)

Purchasing Videos

- [Purchasing Requisition Control](#)
- [Requisition and Purchasing Setup](#)
- [Requisitions with Enterprise Asset Management](#)
- [Stop Routing for an EAM Requisition](#)
- [Requisitions - Entering a Requisition](#)
- [Requisitions - Add Notes and Route For Approval](#)
- [Requisitions - Release to PO](#)
- [PO Requisitions Workflow and Attachments](#)
- [PO Supplier Certification](#)
- [Email a PO to a Supplier](#)
- [Drill Down Functions](#)
- [PO Enhancements](#)
- [Purchasing Manager Action Center](#)
- [Unified Purchase Order Document](#)
- [Unified Receiving and Return Process](#)
- [Creating and Analyzing Supplier Scheduled Releases](#)
- [Manage Supplier Releases Action](#)
- [Purchasing September 2019 Update](#)
- [Supplier Scheduled Orders and Releases](#)

Field Service Management Videos

- [Action Requests](#)

- [Browse Creating Service Orders](#)
- [Creating Service Orders from Action Requests](#)
- [Service Activity Reports](#)
- [Item Usage Return](#)
- [Triage and Tracking Service Orders](#)
- [Action Request Enhancements](#)
- [Creating a Depot Order](#)
- [Receiving a Depot Order and Adding Service Labor](#)
- [Adding a Material Order](#)
- [Recording Parts and Labor with Service Activity Reports](#)
- [Completing and Shipping a Depot Order](#)
- [Customer Quotes for Depot Orders](#)
- [Firm Purchasing, Supplier Scheduled Orders, and Supplier Scheduled Releases](#)

Enterprise Asset Management Videos

- [Maintenance Requests](#)
- [Create and Assign an Asset Work Order](#)
- [Close an Asset Work Order](#)
- [Review a Closed Asset Work Order](#)
- [Maintenance Manager Action Center](#)
- [Asset Work Order Completion](#)
- [Asset Work Order Finish Approval](#)
- [Manage Stores Requisitions Lines Action](#)

Manufacturing Videos

- [Product Structure Training](#)
- [Inventory Transactions and Browse Enhancements](#)
- [Alternate Product Structure and Routings](#)
- [Production Planning and Preparation Enhancements](#)
- [Cycle Counting](#)
- [Item Attributes and Quality Inspections](#)
- [Production Orders - Smoothing Using the Backward Smoothing Method](#)
- [Production Leveling - Finite Capacity by Priority Leveling Method](#)

- [Production Automation](#)
- [Item Attribute Profiles](#)
- [Item Lots](#)
- [Quality Orders](#)
- [Test Specifications](#)

Financials Videos

- [GL Accounts](#)
- [Supplier Activity Dashboards](#)
- [Supplier Invoices](#)
- [Supplier Payment Selections](#)
- [Supplier Invoice with Receiver Matching](#)
- [Supplier Payments](#)
- [Browse Drilldowns](#)
- [Journal Entries](#)
- [QAD Financials September 2019 Update](#)

Fixed Assets Videos

- [Introduction to Fixed Assets](#)
- [Fixed Asset Business Rules](#)
- [Fixed Assets Control](#)
- [Fixed Assets Calendar](#)
- [Fixed Asset Books](#)
- [Fixed Asset Locations](#)
- [Fixed Asset Classes](#)
- [Creating a Fixed Asset](#)
- [Posting an Acquisition](#)
- [Service Life Adjustments](#)
- [Rest of Life Adjustments](#)
- [Transferring an Asset](#)
- [Retiring an Asset](#)
- [Transaction Processing and Reporting](#)
- [Fixed Asset September 2019 Update](#)

Security Videos

- [Field Security](#)

- [Role Permissions](#)
- [Security Menus](#)
- [Security User Access](#)
- [Roles](#)

Platform Videos

- [Creating an App](#)
- [Creating a Business Component](#)
- [Creating an Extension](#)
- [Creating Formula Fields](#)
- [Creating a Non-Embedded Grid](#)
- [Adding a Relationship](#)
- [Adding Conditional Formatting](#)
- [Defining a Lookup and Using Data Lists](#)
- [Defining Generalized Code as a Data List](#)

QAD Adaptive Mobile App

With the QAD Adaptive mobile app, you have direct access to your enterprise resource planning and supply chain business data anywhere and anytime. This app connects to your QAD Adaptive ERP solution, giving you and everyone in your organization timely and relevant business information for getting things done in any location. Whether you are in the office, traveling, or visiting a supplier or customer, you can leverage QAD Adaptive with this easy-to-use mobile experience. Get the QAD Adaptive mobile app now so you can:

- Quickly open the app with Apple Touch ID and Face ID
- Navigate using your predefined role menus to access data in QAD Adaptive
- Leverage the menu search to find what you need, and open recently used menu items
- Import and use the same favorites you have on the Web UI, or set up new mobile favorites
- Manage your workspace and server connections
- Search browse data using advanced search operators
- Sort browse data by key fields
- View form data using default views or other stored views
- Create and maintain CRM Contacts, Accounts, Leads, Opportunities and Events
- Access help content in the app and online

You can access QAD Adaptive on your mobile phone with the QAD Adaptive mobile app, available from the Apple App Store and Google Play. Further information about using the QAD Adaptive mobile app is also available: [QAD Adaptive Mobile App Online Help](#).

Note To use the QAD Adaptive mobile app, you must be a user of the QAD Adaptive ERP solution. Before you can sign in to the app, you must connect to a QAD Adaptive ERP server.

QAD Learning Center

To view available training courses, locations, and materials, use the [QAD Learning Center](#). Choose Education under the Services tab to access this resource. In the Learning Center, you can reserve a learning environment if you want to perform self-study and follow a training guide on your own.

Our innovative [QAD Digital Learning](#) portal, designed to revolutionize the way we approach education and professional development of our customers, partners and employees.

[QAD Digital Learning](#) grants you access to a comprehensive suite of learning tools and resources including:

- **Role based Learning Paths:** Tailor your learning journey to match your area of expertise and career goals. These paths will guide you through a focused set of learning resources designed to strengthen your skills and knowledge in relevant areas.
- **Flexible Learning:** Access learning materials anytime, anywhere, ensuring that you can learn at your own pace and convenience.
- **Interactive Content:** Engaging multimedia content, including videos, animations, and multiple translations will keep you motivated and enhance your learning experience.
- **Manager Dashboard:** Create, assign, and track learning plans for employees, celebrate course and certification completions and support areas needing more focus.
- **Training environment:** Support your self-study and hands-on activities by accessing the training environment.

To learn more about QAD Digital Learning subscription and kick-start your role-based learning journey, please contact digitallearning@qad.com

QAD Support Center

Support also offers an array of tools depending on your company's maintenance agreement with QAD. These include the Knowledgebase and other valuable resources, where you can access and search for topics of interest. Please visit the [QAD Support Center](#).

QAD Document Library

To access release notes, user guides, demo and training guides, and installation and conversion guides by product and release, visit the [QAD Document Library](#). Choose Document Library under the Support tab. In the QAD Document Library, you can view HTML pages online, print specific pages, or download a PDF of an entire book.

To find a resource, you can use the navigation tree on the left or use a powerful cross-document search, which finds all documents with your search terms and lets you refine the search by book type, product suite or module, and date published.

QAD Document Feedback

If you have any feedback about this documentation, please go to the [QAD Document Feedback](#) form.