Administration Guide

QAD Customer Relationship Management

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QAD CRM 6.1
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Contents

About This Guide

What Is in This Guide?

This guide describes administration and integration tasks for QAD Customer Relationship Management (QAD CRM).

This guide has the following sections:

1. Administration

   This section includes information on setting up your organization, territory, security, and configuring your system. It also describes how to administer reports, templates, and the QAD AdminService. For details, see Section 1, “Administration,” beginning on page 11.

2. Integration

   This section includes information on integrating QAD CRM with QAD Enterprise Applications, QAD Remote Sales, and Microsoft Exchange Server. For details see Section 2, “Integration,” beginning on page 143.

The appendix contains field mappings for prospects tables between QAD CRM and your QAD ERP application; for details, see Appendix A, “Field Mappings,” on page 223.

For information about QAD CRM installation, see *Installation Guide: QAD Customer Relationship Management*.

Other QAD Documentation

QAD CRM can be integrated with QAD Enterprise Applications to extend its capabilities. For information on QAD Enterprise Applications, see the following:

- For an overview of new features and software updates, see the *Release Bulletin*.
- For software installation instructions, refer to the appropriate installation guide for your system.
- For conversion information, refer to the *Conversion Guide*.
- For an overview of system features and instructions on navigating the user interface, see *User Guide: QAD User Interfaces*.

- For detailed information on using system features, refer to the relevant user guide.
- For technical details, refer to *Entity Diagrams* and *Database Definitions*.

For a complete list of QAD documentation, visit the QAD Support site.

Online Help

QAD CRM has an extensive online help system that is an online version of *User Guide: QAD Customer Relationship Management*. Online help is available by choosing Help|QAD Customer Relationship Management Help.

QAD Web Site

QAD's Web site provides a wide variety of information about the company and its products. You can access the Web site at:

http://www.qad.com

For users with a QAD Web account, product documentation is available for viewing or downloading from the QAD Online Support Center at:

http://support.qad.com/

You can register for a QAD Web account at the QAD Online Support Center. Your customer ID number is required. Access to certain areas is dependent on the type of agreement you have with QAD.

Most user documentation is available in two formats:

- Portable document format (PDF). PDF files can be downloaded from the QAD Web site to your computer. You can view them with the free Adobe Acrobat Reader.
- HTML. You can view user documentation through your Web browser. The documents include search tools for easily locating topics of interest.

Conventions

Screen Illustrations

QAD CRM has a feature-rich Progress-based graphical user interface (UI). All screen captures in this guide show this interface.

Typographic

This document uses the text or typographic conventions listed in the following table.

If you see:	It means:
`monospaced text`	A command or file name.
`italicized monospaced text`	A variable name for a value you enter as part of an operating system command; for example, *`YourCDROMDir`*.
`indented` `    command line`	A long command that you enter as one line, although it appears in the text as two lines.
Note	Alerts the reader to exceptions or special conditions.
Important	Alerts the reader to critical information.
Warning	Used in situations where you can overwrite or corrupt data, unless you follow the instructions.

Chapter 1

Overview

This section contains an overview of QAD Customer Relationship Management (QAD CRM). It discusses the following topics:

QAD CRM Components

This section provides an overview of the following components that constitute the QAD CRM application:

- QAD Sales Force Automation
- QAD Marketing Automation
- QAD Remote Sales

For more information about these components, refer to *User Guide: QAD Customer Relationship Management*.

QAD Sales Force Automation

QAD Sales Force Automation is the core of QAD CRM, and enables salespeople to generate business and manage customer relationships. This layer of the QAD CRM application appears as Sales Management on the application menu.

QAD Marketing Automation

QAD Marketing Automation is an optional layer that integrates with the QAD Sales Force Automation layer to provide features for managing and maintaining marketing campaigns. This layer of the QAD CRM application appears as Marketing Management on the application menu.

QAD Remote Sales

QAD Remote Sales is an optional application that can be installed on the stand-alone machines of remote sales personnel to enable interaction with the QAD CRM central (host) database.

Remote users can synchronize the data on their remote machines with the central database to ensure that both remote and central databases contain the latest data.

QAD Remote Sales interacts with both the QAD Sales Force Automation and QAD Marketing Automation layers.

Typically setup configuration of QAD Remote Sales is performed by a system administrator. For details, see Chapter 12, “QAD Remote Sales Integration,” on page 163.

Synchronizing data between remote and host databases is typically performed by a salespersons as part of their everyday activities; for details, refer to *User Guide: QAD Customer Relationship Management*.

System Integrations

This section provides an overview of the different systems or applications that can be integrated with QAD CRM.

QAD Enterprise Applications Integration

Certain modules within QAD CRM can be integrated with QAD Enterprise Applications. When these modules are integrated, you can synchronize data—for example, product information—in QAD CRM with the corresponding information in the QAD Enterprise Applications database.

For more details on QAD Enterprise Applications integration, see Chapter 11, “QAD ERP Integration,” on page 145.

Microsoft Exchange Server

QAD CRM can be integrated with Microsoft Exchange Server 2003. When integrated, you can store references to e-mail messages sent and received from Microsoft Exchange Server 2003, as well as synchronize details of contact persons and activities between the two systems.

For details on Microsoft Exchange Server integration, see Chapter 14, “Microsoft Exchange Server Integration,” on page 199.

Security

The QAD CRM system provides multiple types and levels of security that should be viewed within the context of your organization's overall security framework. While it is beyond the scope of this guide to discuss the details of information security, the fundamental components involve measures to assure the preservation of:

- Confidentiality—ensuring that information is accessible only to those authorized to have access
- Integrity—safeguarding the accuracy and completeness of information and processing methods
- Availability—ensuring that authorized users have access to information when required

Security properly starts with a comprehensive policy statement that demonstrates management support and commitment to security, and defines the principal security components important to the organization

After the policy statement is prepared, procedures, guidelines, and other supporting administrative controls are typically defined to support the policy. Finally, technical controls are designed and implemented to support the administrative controls.

For details about planning and implementing security within QAD CRM, see Chapter 5, "System Security," on page 39.

QAD AdminService

QAD ADS is a Windows service for managing and executing background jobs that is installed as part of the QAD CRM system installation. QAD ADS is a multi-threaded application that executes jobs concurrently. QAD ADS automates and executes jobs defined in QAD CRM and with QAD ADS. A job can be a single task or a series of tasks.

For details on using and configuring the QAD ADS, refer to the online help for this component.

Chapter 2

Getting Started

This section provides an overview of the QAD Customer Relationship Management (QAD CRM) setup. It discusses the following topics:

Overview

Many tasks must be performed to ensure a successful implementation of the QAD CRM system. Setup tasks are divided into the following types:

- Mandatory setup
- Function setup

Mandatory Setup

Mandatory setup must be performed immediately after installing the QAD CRM system. Mandatory setup tasks must be performed before performing any function setup tasks.

Mandatory setup involves running the Configuration Wizard to provide information required for system operation—details about business units, the host node, the base currency, and supported system languages. Mandatory setup also configures the system administrator profile required for completing function setup.

For details about mandatory setup, refer to Chapter 3, “Post-Installation Configuration,” in *Installation Guide: QAD Customer Relationship Management*.

Function Setup

Before performing your function setup, it is best to develop a detailed implementation plan that describes how the various system components will support your organization’s needs.

An implementation plan helps to identify how your existing business processes can be mapped to the system. In particular, your implementation plan should identify requirements for system security based on the needs of your various departments and personnel. For details on security, see Chapter 5, “System Security,” on page 39.

Use the components in the Settings menu to set up and configure your QAD CRM system.

Section 1

Administration

This section describes the administration of the QAD Customer Relationship Management (QAD CRM) system.

Chapter 3

Organization Setup

This section describes how to set up business units, users, and teams in QAD Customer Relationship Management (QAD CRM). It discusses the following topics:

Overview

Managing business units, users, and teams is an integral component of QAD CRM system administration since these components are at the core of your business-generating efforts.

The QAD CRM system provides significant flexibility in the business unit, user, and team setup process. This allows you to create teams and business units when creating and maintaining users from the Users component. Typically these components might be configured in the following sequence:

1. Business units
2. Users
3. Teams

Note It is recommended that you plan your system before implementing these components. In particular, you should have conducted an audit of your organization's security requirements prior to setting up the security-related attributes of business units, teams, and users. For details, see Chapter 5, "System Security," on page 39.

Business Units

An organization may have branch offices, subsidiaries, or business partners whose data may need to be maintained in the system. QAD CRM provides features for managing business unit data.

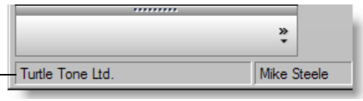
Using the Business Units component, you can maintain details of as many business units as required to meet the needs of your organization. System users can only access the data for a business unit when their user profile is associated with that business unit profile.

All users in the system must be associated with at least one business unit in order to log in. A user that is associated with multiple business units can choose which business unit to access at login. A user cannot switch business units during a session—they must log out of the system and then log in again.

The name of the active business unit displays at the far left of the application status bar during the user session, as shown in Figure 3.1.

Fig. 3.1
Active Business Unit

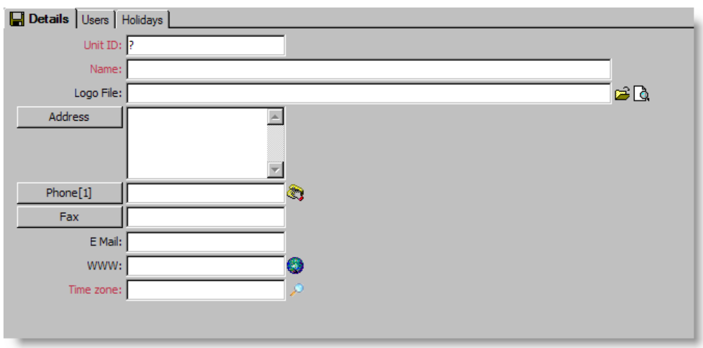
Active business unit



To access the Business Units component, choose Main Menu|Settings|Organization|Business Units. The Business Units pane displays showing the units currently defined in the system.

Details Tab

Fig. 3.2
Business Units - Details Tab



Unit ID. Enter a unique code for the business unit.

Name. Enter the name of the business unit.

Logo File. Enter the location and name of the graphics file containing the logo of the company. Click the Open Folder icon to select the graphics file. To view the specified file, click the View icon.

Note The selected image displays in the main application workspace when no application menu item is selected. For example, you can select a graphic of your company logo and it will display when the application opens.

Address. Enter address details as required. Providing country information is mandatory.

Phone. Enter telephone details as required.

Note If you have a modem connected to your computer, you can click the icon to the right to use the dial-out facility.

Fax. Enter fax details as required.

E-mail. Enter an e-mail address.

WWW. Enter an Internet address. You can click the icon to the right to launch your Internet browser to the specified address.

Time zone. Enter a time zone for the business unit.

A time zone must be specified when defining a business unit. Time zones are defined in relation to Greenwich Mean Time (GMT); for example, the GMT-8 time zone, which applies to the west coast of the United States, is 8 hours behind GMT.

Note For planning activities, the system uses a hierarchy to determine which time zone to use. First the system checks the time zone specified in the user's Preferences|My Settings module. If there is no time zone specified, the system uses the time zone specified in the user's database record. If the record does not specify a time zone, the system uses the time zone specified for the business unit associated to the user.

Users Tab

Use the Users tab to associate a user profile to the business unit profile. Every user must be associated with at least one business unit in order to log in to the system. For details of associating users and business units, see "Users" on page 17.

Holidays Tab

Use the Holidays tab to define a holiday schedule for a business unit. You specify details of non-working days to a business unit the same way as you do for a user. For details, see "Holidays" on page 23.

Users

The system administrator is responsible for creating and maintaining user profiles in the system. A user can have multiple user profiles; each user profile has a unique user ID and password. A user can only use one profile at a time when logged in to the system.

A user can be a member of a *permission group* or multiple groups with access to specific system menus. The system administrator creates permission groups, and defines access permissions to the system according to user profiles.

Users who share areas of responsibility are typically members of the same team; team membership determines access to database records (row-level security). For example, a user cannot view a profile if that profile is associated with a different team.

Permission groups and teams are important considerations when implementing system security. For details, see Chapter 5, "System Security," on page 39.

Use the features in the Users component to maintain user profile information. The Users component has several tabs to maintain different parts of the user profile, such as basic user profile information; permission group, business unit and menu associations; team affiliations; holidays; and so on.

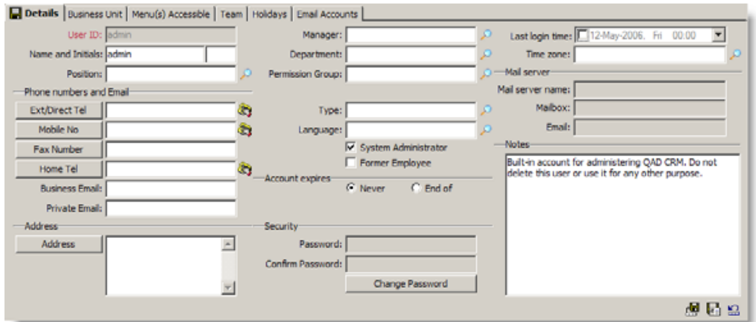
To access the Users component, choose Main Menu|Settings|Organization|Users. The Users browse lists the users defined in the system.

Note You can copy details of an existing user and edit it to create a new user profile. To copy an existing user profile, right-click the user profile you want to copy and choose Copy (or click Copy on the toolbar). The Details tab displays with the copied user details.

Details

Use the Details tab to maintain basic identifying information for the user profile—name, position, manager, contact details, and so on. You also maintain the user password using this tab.

Fig. 3.3
Users - Details Tab



User ID. Enter a unique user ID for the user. This ID is used by the users in conjunction with a password to access the system.

Name and Initials. Enter the first, middle, and last name of the user.

Position. Enter the position of the user.

Manager. Enter the manager to whom the user reports.

Department. Enter the department in which the user works.

Permission Group. Enter a permission group for the user. This determines the areas of the system the user can access. A user can belong to only one permission group. For details about security and permission groups, see “Permission Groups” on page 43.

Last Login Time. Displays the time and date of the previous login of the user.

Time Zone. Enter the time zone for the user.

If a time zone has not been specified in My Settings|Preferences, the system uses the time zone defined here for user activities. If no time zone has been defined here, the system uses the time zone defined for the business unit that is active during the user’s current session. If a user is associated with multiple business units, the time zone of the business unit that is active during the current session is used for an activity. Tasks always use local time.

Mail server name. Displays the mail server name if your system is integrated with Microsoft Exchange Server.

Mailbox. Displays the user's mailbox if your system is integrated with Microsoft Exchange Server.

Email. Displays the user's email address if your system is integrated with Microsoft Exchange Server.

Ext/Direct Tel. Enter the direct work telephone or extension numbers of the user. Specify other contact details of the user in the Fax Number, Home Tel, and Mobile No text box.

Note You can click the Telephone icon to use the dialout facility to make a phone call or send a fax to the user from your computer.

Business Email. Enter the business e-mail of the user.

Private Email. Enter the private e-mail address of the user.

Note You can click the Email icon next to the text box to directly send an e-mail to the user.

Address. Enter the user address.

Type. Enter the user type or skill level.

Language. Enter the language the system should automatically use when the user logs in.

System Administrator. Select this check box to assign system administrator rights to the user.

Former Employee. Select this check box to indicate that the user has left the company.

Account Expires. Indicate whether the user profile expires. If the End Of option is selected, you must enter an expiration date.

When a user account expires, that user is prevented from logging in to the system. To restore system access, the user account must be modified by selecting the Never option or providing a new expiration date.

Password. Enter a password for the user, then enter the same password in Confirm Password. After entering passwords using this function, you must provide passwords to all users so that they can access the system.

Note For an existing user, click Change Password to enable the Password and Confirm Password fields.

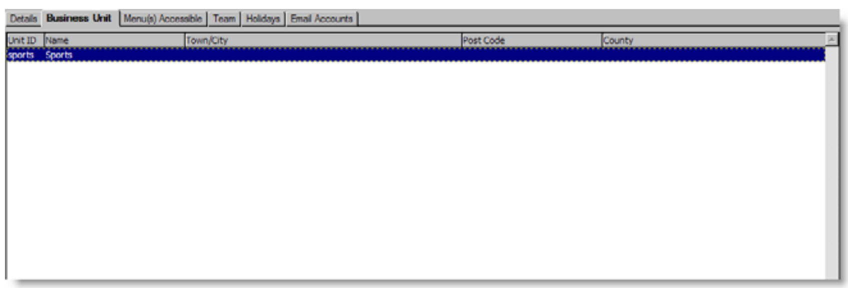
An administrator can give users the ability to change their passwords by providing access to the My Settings|Details screen.

Business Unit

Use the Business Unit tab to maintain associations between a user profile and business units defined in the system. A user must be associated with a business unit in order to access data for that unit. A user profile can be associated with one or more business units, but can only work on data for one business unit at a time. At login, a user who is associated with multiple business units can choose which business unit to work on.

Note You can also use the Business Unit component to maintain user profile/business unit associations.

Fig. 3.4
Users - Business Unit



To attach a user profile to a business unit:

1. Choose Main Menu|Settings|Organization|Users.
2. Select a user in the Users listbox.
3. Right-click the Business Unit listbox and choose Add. The Attach Business Unit dialog box displays.

   Note The right-click menu also lets you edit or delete user profile/business unit associations.

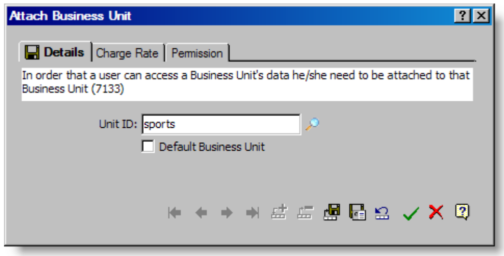


Fig. 3.5
Attach Business Unit

4 Provide information for the Details tab, as required.

Unit ID. Enter the business unit to associate with the user profile.

Default Business Unit. If the user profile is attached to multiple business units, select this check box to indicate that this is the default business unit for this user profile.

5 Provide information for the Charge Rate tab, as required.

Charge Rate 1. Enter the normal hourly charge rate that the business unit pays the user.

Charge Rate 2. Enter any other hourly charge rate—such as weekend charge rate—that the business unit pays the user.

6 Provide information for the Permission tab, as required. The Permissions tab lets you restrict actions for the specified user when that user is working with the business unit:

- Add Records
- Edit Records
- Copy Records
- Delete Records
- Update Records

Menu(s) Accessible

Use the Menu(s) Accessible tab to define the menus the user can access. A user can be attached to multiple menus. A user that is attached to multiple menus can choose which menu to use at login.

For details about defining menus, see “Menu Manager” on page 54.

Note You can also use the Menu Manager to manage users and menus.

To assign a user to a menu:

1 Choose Main Menu|Settings|Organization|Users.

2 Select the user in the Users listbox you want to assign to a menu.

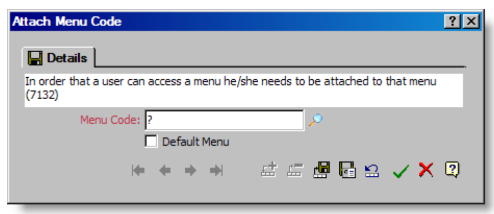
3 Click the Menu(s) Accessible tab. Any menus currently associated with the selected user display.

4 Right-click the Menu(s) Accessible listbox and choose Add.

   Note The right-click menu also provides options for editing and deleting existing menu assignments.

   The Attach Menu Code dialog box displays.

Fig. 3.6
Attach Menu Code



5 In the Menu Code field, enter a code for the menu to attach.

6 If this is the default menu for the user, select the Default Menu check box.

7 Click OK.

Team

Users with similar job profiles can be grouped into teams, such as Sales, Marketing, or Management. A user can be a member of multiple teams. Team affiliation determines a user's record-level permissions in the system; for details, see "Teams" on page 26.

Holidays

To assign a user to a holiday schedule:

1 Choose Main Menu|Settings|Organization|Users.

2 Click the Holidays tab. Any holidays currently associated with the selected user display.

3 Right-click the Holidays listbox and choose Add.

Note The right-click menu also provides options for editing and deleting existing holiday schedules.

The Non-Working Days Details dialog box displays.

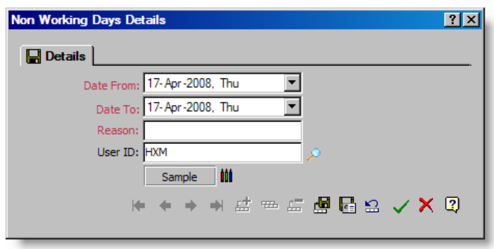


Fig. 3.7
Non-Working Days Details

4 Enter the start and end dates, a reason for the non-working period, and a user ID.

5 Click OK.

E-mail Accounts

Use the Email Accounts tab to associate a user with an e-mail account and to maintain e-mail account details. A user can have multiple e-mail accounts, one of which is a default account.

To associate a user to an e-mail account:

1 Choose Main Menu|Settings|Organization|Users.

2 Click the Email Accounts tab. Any accounts currently associated with the selected user are displayed.

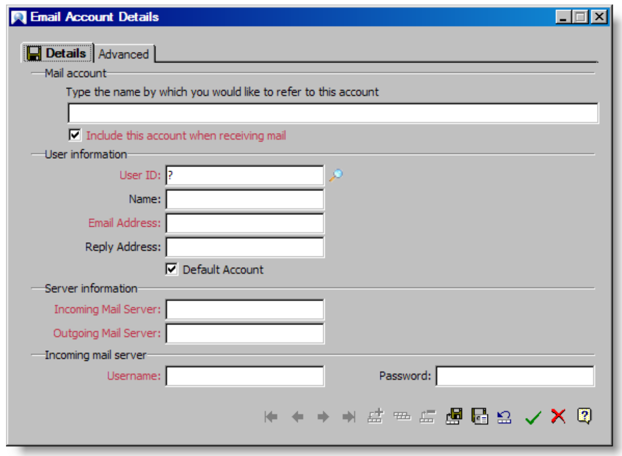
3 Right-click the Email Accounts listbox and choose Add.

Note The right-click menu also provides options for editing and deleting existing e-mail accounts.

The dialog box has two tabs: Details and Advanced.

Details

Fig. 3.8
Email Account Details



Account name. Enter a name by which this e-mail account should be called.

Include this account when receiving mail. Select this option to include the e-mail account when receiving mail for the system user.

User ID. Enter a user ID to associate with this e-mail account. The user must be defined in the system.

Name. Enter the name of the user to associate with this e-mail account.

Email Address. Enter the e-mail address for the user. The user will use this e-mail address for sending e-mail messages.

Reply Address. Enter the address on which the user will receive replies to e-mail messages.

Default Account. Select the check box if this is the default e-mail account for this user.

Incoming Mail Server. Enter the name of the incoming mail server for the e-mail account.

Outgoing Mail Server. Enter the name of the outgoing mail server for the e-mail account.

Username. For the incoming mail server, enter the user name that the system user must use for receiving e-mail messages using the account.

Password. For the incoming mail server, enter the password that the system user must use for receiving e-mail messages using the account.

Advanced

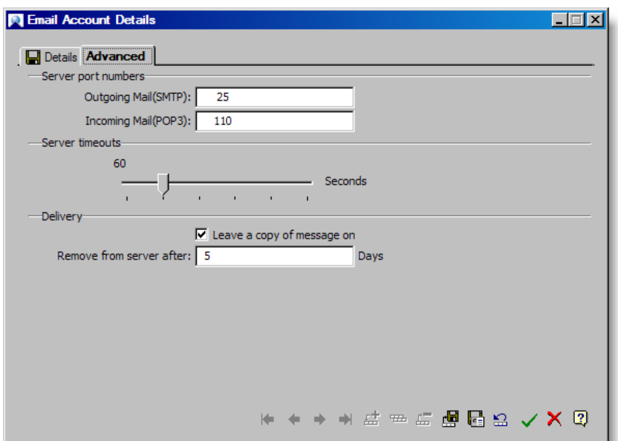


Fig. 3.9 Email Account Details - Advanced Tab

Outgoing Mail (SMTP). Enter the port number of the outgoing mail server.

Incoming Mail (SMTP). Enter the port number of the incoming mail server.

Server Timeouts. Using the slider, enter the number of seconds for server timeout. This time specifies how long to wait for a response from the server before ceasing attempts to send or receive e-mail messages.

Leave a Copy of Message on. Select the check box to leave a copy of the e-mail messages on the incoming mail server.

Remove from Server after. Enter the number of days after which to delete e-mail messages from the incoming mail server.

Teams

Teams are associated with a business unit. Team members typically share job or role responsibilities. Users can belong to as many teams as required for business requirements. Team affiliation determines the business unit data that a user can access.

Teams can themselves contain teams. For example, a Sales team might consist of two teams, such as Northern Region Sales and Southern Region Sales. Typically a user who is a member of one team cannot view data—such as sales data—for a user associated with a different team.

If required, teams can be configured to allow data to be shared with other teams by creating a team hierarchy. Data sharing operates in a top-down mode: teams higher in a team hierarchy can view the data of members in lower teams, but not vice versa. Teams that are on the same level can share data.

Note If you do not want to implement team-level security for Opportunities and Activities, you must set up a default team and attach all users to this team.

For more information about teams and security, see Chapter 5, “System Security,” on page 39.

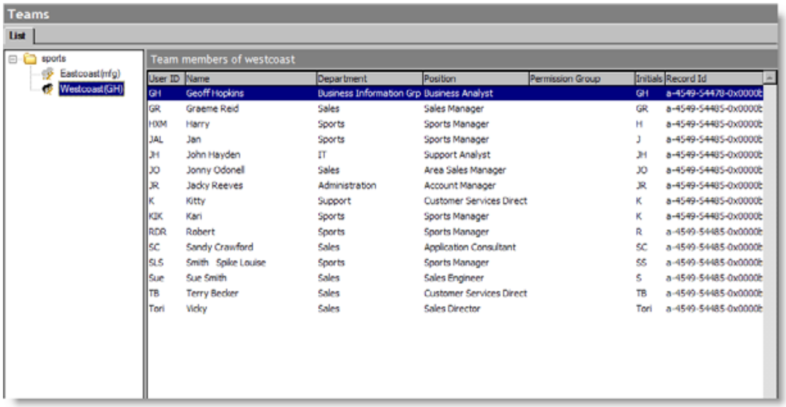


Fig. 3.10
Teams

The Teams window has two areas. The left-hand pane lists the name of the business unit and the teams that are currently attached to that unit. Teams are arranged in a hierarchy. The right-hand pane lists the members in the selected team.

To create a team:

1. Choose Main Menu|Settings|Organization|Teams. The Teams window displays.
2. Right-click the business unit to create a team under the unit. Or right-click an existing team to create a subteam within that team.

   Note The right-click menu also contains options for editing and deleting a team.

3. Choose Add from the menu. The Team Details dialog box displays.

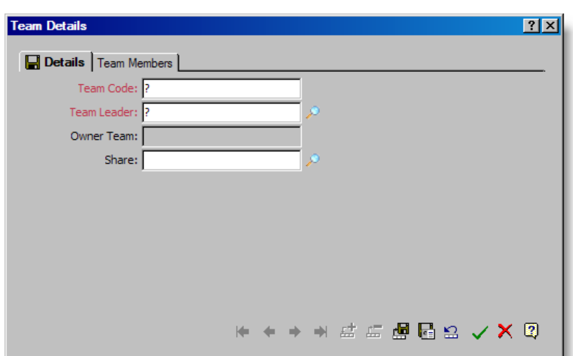


Fig. 3.11
Team Details

4 Complete the Details tab as required.

Team Code. Enter the team code.

Team Leader. Enter a team leader for the team. The team leader must be a user defined in the system.

Share. Enter a team to share data with. If no team is specified, no data sharing is enabled.

5 Select the Team Members tab. The Members of Team <*Name*> listbox displays. The team leader is listed.

Note You can also attach a user to a team by using the Team tab in the Users component.

6 Right-click the listbox and choose Attach User. The Attach User(s) window displays the system users.

7 Select the users to attach to the team and click OK.

Note You can use Ctrl+click to select multiple users at a time.

Users and Remote Nodes

Using the Users module, you can do the following remote-node related actions:

- Create a remote node.
- Maintain node attachments.

Creating Remote Nodes

If you are on the host database, you can create a remote node for a user by right-clicking the user in the Users browser and choosing Create a Remote Node from the menu.

Note If you are working on a remote database, this option is not available.

If a node already exists for the user, you can edit the node details. If a node does not exist for the user, the system does either of the following:

- If no enabled regional node exists under the login node, the system creates a remote node for the selected user under the login node.

- If one (or more than one) enabled regional node exists under the login node, the user is given the option to choose which parent node the remote should be created under.

Maintaining Node Attachments

You can also attach or detach a user from a remote node. Attaching a user to a node means that all the profiles associated with that user are also attached to the node. Conversely, detaching a user from a node also detaches from the remote node any profiles that are attached to that user.

If you remove a system user from a business unit and they are attached to a remote node, if the user is not attached to any other business unit, the system will ask whether to disable the remote node to which the user was attached. This also applies if an employee is made a former employee.

When a team is attached to a node, if another team is configured to share that team's data, the profiles associated with the new team will also be subscribed to the remote node.

For more information about working with remote nodes, see Chapter 12, "QAD Remote Sales Integration," on page 163.

Chapter 4

Territory Management

This section describes how to set up territories in QAD Customer Relationship Management (QAD CRM). It discusses the following topics:

Overview

Account managers who are responsible for marketing products operate in certain geographic locations or for certain industries. These geographic locations or industries are referred to as *territories*.

A territory that is a geographic location can be represented by a zip code or post code, region, county, state, and so on. Different types of industries are represented by standard industry codes (SIC).

Profiles that exist within a specific territory can have an internal account manager as well as an external account manager. An internal account manager manages the account for the profile off-site; the external account manager visits the profile site.

Using the territory management features in the Territory Management component lets you manage details of your territories. These territories are used in modules that manage or require details of account managers, such as the Marketing Management module.

Using the Territory Management module you can:

- Define territories and assign them to account managers.
- Reassign territories to account managers.

Define Territories

To define a territory:

1. Choose Main Menu|Settings|Territory Management|Define Territories. The Allocation by Method browser displays.
2. Depending on which manager you want to define a territory for, click either External A/C Manager or Internal A/C Manager. The list of territory types displays.

Region	A region defines the territory; for example, Asia-Pacific.
Post Code	A post code defines the territory; for example, 95066.
County	A county defines the territory; for example, San Francisco.
State	A state defines the territory; for example, California.
Country	A country defines the territory; for example, Czech Republic.
Group	A group defines the territory; for example, QAD or Oracle.

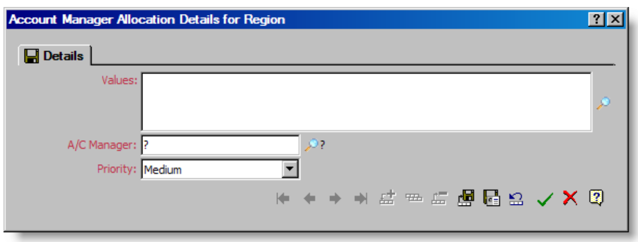
SIC Code	A code defines the territory; for example, 44613 - Optical Goods Stores.
Profile Type	A profile type defines the territory; for example, Competitor or Customer.
Analysis Group	An analysis code defines the territory.

3 Select a territory type.

4 Right-click the Define Territories list box, and then choose Add. The Account Manager Allocation Details dialog box displays for the selected territory type.

Note The context menu also contains options for editing or deleting an allocation, as well as creating an Allocation by User report.

Fig. 4.1
Account Manager Allocation Details



5 Complete the fields as required.

Values. Enter a value for the territory type.

Note You can enter multiple territory codes by using commas between values; for example, for post codes you can enter 95066,95067,95068.

A/C Manager. Enter a manager defined in the system to associate with the territory.

Priority. Enter a priority: Low, Medium, or High.

Note Priorities are used to control display preferences in browsers if territories overlap. For example, if you define sales representative A for Sydney using the high priority and sales representative B with a medium priority, in the browser sales representative A displays above sales representative B.

Reassign Territories

As circumstances change, it may be necessary to reassign the territories belonging to an account manager to a different account manager. Using the Reassign Territories component in Territory Management, you can reassign profiles that comply with certain conditions to other account managers. For example, you can reassign all profiles in the Asia-Pacific region to a new account manager; or reassign all profiles in the USA whose SIC code is 111.

Note Territories are assigned to an account manager when specifying a territory record, so profiles in the territory have the same account manager as allocated to that territory; see “Define Territories” on page 32 for details. However, a different account manager can be allocated to a profile when the profile is created or modified.

You reassign profiles by doing the following:

1 Select the profiles to reassign.

2 Process the profiles.

Profile Selection

You can manually select the profiles to reassign, or use search criteria to assemble a list of profiles to be reassigned. If you need to reassign many profiles, use search criteria to save time.

Manual Selection

To select a profile manually:

1 Choose Main Menu|Settings|Territory Management|Reassign Territories. The List browser displays any profiles in the system requiring reassignment that have not yet been processed.

   Note If you already see the profiles you want to reassign, select the profiles and jump to “Profile Processing” on page 37.

2 Right-click the browser and choose Add. The Enter Profile dialog box displays.

Note You can remove a profile from the reassignment list by right-clicking the profile and choosing Delete. This removes the profile from the reassignment list—it does not delete the profile from the system.

3 Click the Select Profile button. The Find Profile/Contact dialog box displays.

4 Locate and select the profile you want to reassign, and then click OK.

5 Click OK to add the selected profile to the list for reassignment.

Selection Using Search Criteria

To select profiles using search criteria:

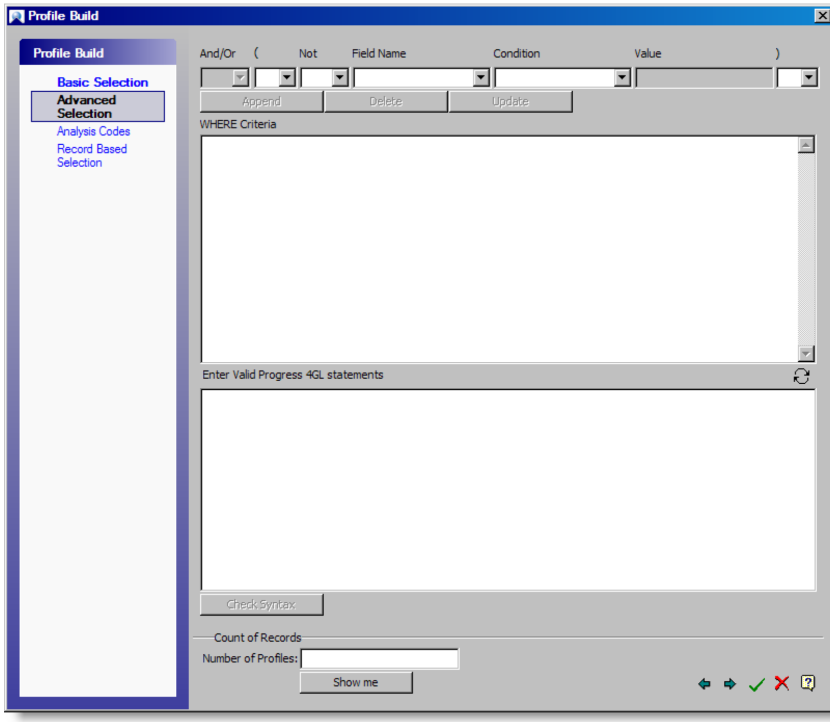
1 Choose Main Menu|Settings|Territory Management|Reassign Territories.

2 Right-click the List browser and choose Build.

   Note You can also choose File|Build or click Build on the toolbar.

   The Profile Build dialog box displays.

Fig. 4.2
Profile Build - Advanced Selection



3 Specify your criteria for selecting profiles in the fields at the top of the dialog box.

Note You can click Basic Selection, Advanced Selection, Analysis Codes, or Record Based Selection to change the types of criteria you can use.

For example, to display all profiles in the North region, specify the following:

```
(PROSPECT.Region is(exactly) 'North')
```

4 To add more criteria, click Append and perform step 3.

Note Syntax errors may occur when you append or modify conditions. It is a good practice to check the syntax before processing conditions. To check syntax errors, click Check Syntax.

5 Click OK. The profiles that fulfill the specified conditions are displayed in the List browser. You can now reassign these profiles to a different account manager; see “Profile Processing” on page 37.

Profile Processing

To reassign profiles:

1 Select the profiles you want to reassign to a different account manager.

   Note To select multiple profiles, hold down the Ctrl key and select the profile records.

2 Right-click the list of territories and choose Process.

   Note You can also choose File|Process or click Process on the toolbar.

   The Change of A/C Manager dialog box displays.

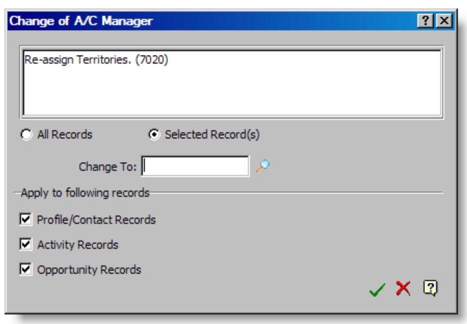


Fig. 4.3
Change of A/C Manager

3 Specify the profiles to reassign: All Records or Selected Records.

4 In the Change To text box, enter the new account manager for the profiles.

5 In the Apply to Following Records area, select which records to reassign: Profile/Contact Records, Activity Records, or Opportunity Records.

6 Click OK. The specified account manager is assigned to the selected profiles.

Chapter 5

System Security

This section describes security in QAD Customer Relationship Management (QAD CRM). It discusses the following topics:

Overview

The security model used by the QAD CRM system controls who can access the system and defines the actions that users defined in the system can perform.

Using system security features, you can configure system login behavior, create and maintain users, teams (roles), and permission groups, and specify user access to business units. Using a combination of these security-related features, you can control user access to system menus and functions.

Using login security features, you can secure your system from unauthorized users. You can also configure additional types of security that provide enhanced protection for individual database records.

Note If you intend to use a QAD ERP application with QAD CRM, a system administrator must configure security for the ERP application separately. For details, see *User Guide: QAD Security and Internal Controls* or *User Guide: Manager Functions*, depending on your version of the application.

Security

The QAD CRM system has several types or levels of security that operate together to ensure a secure system. During an application session, these security levels or types may operate at the same time, as shown in Figure 5.1.

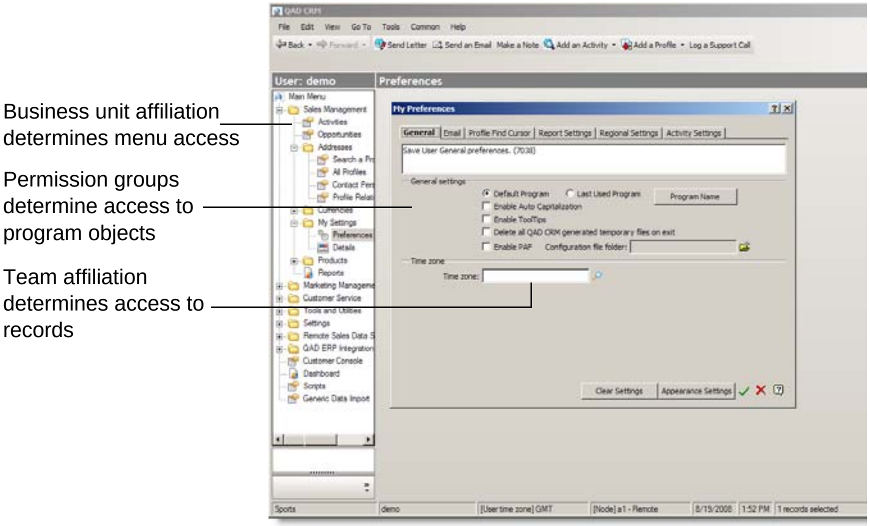


Fig. 5.1
Different Types of Security

The QAD CRM system does not have a specific component that is dedicated to security setup. Instead, configuring your system security involves using multiple system components, such as the User component, the Program Manager, Menu Manager, and Field Object Manager.

For details about the User component, see “Users” on page 17. For details about the Program Manager, Menu Manager, and Field Object Manager, see Chapter 6, “Menu, Program, and Field Object Management,” on page 45.

Security in QAD CRM involves the following system features or components:

- Login security
- Business units
- Teams
- Permission Groups

Login Security

Login security determines whether a user can log in to the application. This level of security is always active and requires that users specify a valid user ID and password combination before they can log in.

If, after three login attempts, the user has still not entered a valid user ID and password combination, the Logon screen closes. The user must relaunch the application and attempt to log in again.

For details about logging in to the system, refer to *User Guide: QAD Customer Relationship Management*.

Business Units

A *business unit* can be a branch office, subsidiary, or business partner whose data must be maintained in the system. You can associate a user profile with one or more business units to allow a user to access data for that business unit.

A user must be assigned to at least one business unit in order to access the system; in turn, a business unit is assigned a system menu. If a user is assigned to more than one business unit, the user can choose which business unit to log in to, as well as which system menu to use.

Use business units to control the menus that your system users have access to—and the functions they can perform—according to the requirements of the department or organization. For example, a Management group might require access to all system features, while a Sales group might only require access to a subset of features that are relevant to their business activities.

For details about business units, see “Business Units” on page 14.

Teams

A *team* is a group within a business unit to which a system user is associated. Business units may have multiple teams.

For example, your business unit may have two teams: the Northern Region Sales team and the Southern Region Sales team. Typically users assigned to a team can access sales data for their team only, unless the teams have been configured to share sales data.

For details about business units, see “Teams” on page 26.

Permission Groups

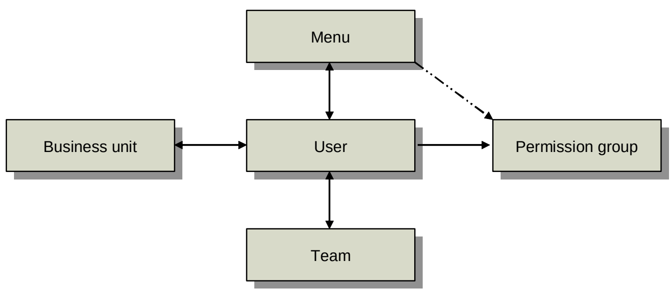
Permission groups are used to control user access to system objects such as programs and program pages (tabs on screens). You can assign a program object in the system to a specific permission group so that only users within that group can access the program.

For details about business units, see "Users" on page 17.

Security Relationships

Figure 5.2 illustrates the relationship between a system user and system menus, business units, permission groups, and teams.

Fig. 5.2
Security



The direction of the arrows indicates how associations are made. For example, a user can be assigned to a team, or a team to a user (bi-directional arrows); a user can be assigned to a permission group, but not vice versa (unidirectional arrows). The dotted line between Menu and Permission group indicates this relationship is created by the association between User and Menu.

For details about setting up your organization, see Chapter 3, "Organization Setup," on page 13.

Chapter 6

Menu, Program, and Field Object Management

This section describes maintaining menus, programs, and field objects in QAD Customer Relationship Management (QAD CRM). It discusses the following topics:

Overview

Using the Program Manager, Menu Manager, and Field Object Manager, you can configure the programs, application menus, and fields on the various screens to suit your requirements. Configuration also integrates your security model into your system; for details on security, see Chapter 5, "System Security," on page 39.

Programs

The modules within the QAD CRM system are collections of Progress programs. Some programs have user interfaces such as dialog boxes or screens.

Each system program has objects or procedures, which are used to perform various tasks. For example, the Activity Manager has the Add Activity procedure that the program uses to add details of a new activity.

Programs have two levels of objects:

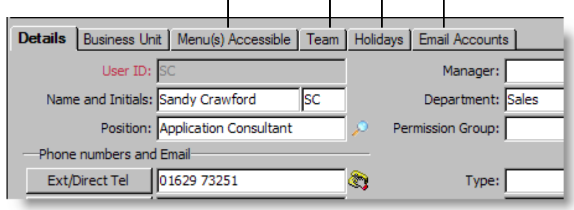
- Tab-level
- Procedure-level

Tab-Level Objects

You can maintain the tabs on program screens, their labels, display order, and context ID used for the help system. For example, you can configure the Details tab in the Activity Manager program to be the second tab from the left-hand side of the program object.

Fig. 6.1
Program Object and Tabs

The Users program object has several associated tabs



Tabs typically contain procedures. For example, the Details tab generally has options to execute the Add, Edit, and Delete procedures. In this case, these three procedure objects are associated with the Details tab object.

Procedure-Level Objects

Procedure-level objects are associated with tab objects and define the tab contents. Procedure-level objects specify internal procedures for performing tasks. For example, the ability to add details of a new activity in the Activity Manager program is achieved through a procedure-level object.

You can put procedure-level objects in the toolbar and/or menu. Some procedures have a user interface—others can run in the background without being noticed by the user.

When configuring security, you can specify which users can access a tab or procedure. Implementing new or modified objects requires technical knowledge of the QAD CRM system; it is recommended that you contact QAD Support prior to customizing your system.

For details on using the Program Manager, see “Program Manager” on page 48.

Menus

QAD CRM allows you to configure the menus that are available to system users according to their responsibilities and business function. For example, the Management group may need access to the entire system, but the Sales group might need access to only a subset of features. When a user logs in, the system displays only those menus and menu options that are defined for the business unit and team to which the user belongs.

Using the Menu Manager, you can create menus and assign functionality to users and permission groups. Only system administrators should have access to the Menu Manager.

For details on using the Menu Manager, see “Menu Manager” on page 54.

Field Objects

Field objects in the system correspond to the records in the system database. Field object security—implemented by assigning specific fields on a screen to a user or a permission group—enables users to view and/or edit the values in certain fields, while other fields are protected.

Use the Field Object Manager to maintain the database table fields that display on the system dialog boxes and screens. You can customize various attributes, as well as define permissions for individual fields.

For details on using the Field Object Manager, see “Field Object Manager” on page 65.

Program Manager

Use the Program Manager to maintain system programs and customize the system to your requirements. You can add, modify, or delete programs as required. You also can maintain the objects associated with a program by using the Objects tab.

Important Using the Program Manager to customize your system programs requires prior experience with Progress systems, as well as in-depth technical knowledge of the QAD CRM system. It is recommended you contact QAD Support for assistance with customizing your system.

To access the Program Manager, choose Main Menu|Settings|System|Program Manager.

The Program Manager pane displays the programs defined in the system and a description.

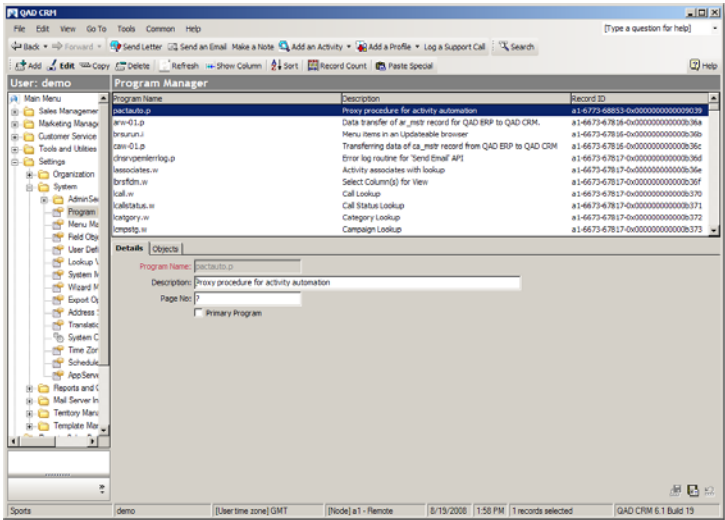


Fig. 6.2
Program Manager

Details Tab

Use the Details tab to maintain program details such as descriptions, page number, and so on. You also can indicate if a program is a primary program. Only primary programs can be accessed from the application menu.

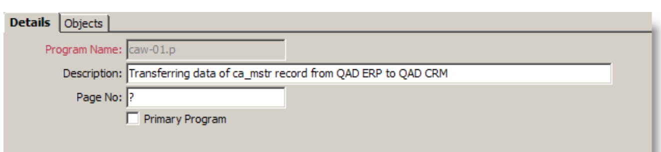


Fig. 6.3
Program Manager - Details Tab

Program Name. Enter the name of the program, including the extension (`.i`, `.w`, or `.p`). Once the record is saved, the program name cannot be changed.

Description. Enter a short description of the program.

Page Number. If required, specify the page number for the program. An incorrect page number may cause an error when the program is executed, so the value entered here must be correct.

Primary Program. Select the check box to indicate that this is a primary program that will be executed by selecting the program shortcut from the application menu.

Note Only primary programs can be added to menus as shortcuts by using the Menu Manager. For details, see “Menu Manager” on page 54.

Note Other tasks must be performed to implement the program successfully. Depending on implementation requirements, this may include changing program code and recompiling.

Deleting Programs

You can use the Program Manager to delete programs from the system.

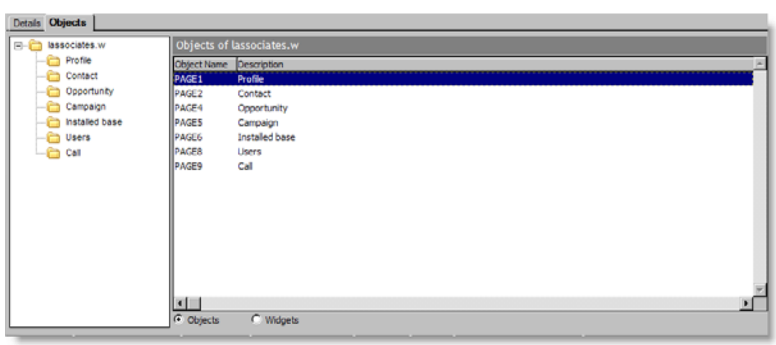
Important Before deleting a program, make sure you understand the consequences of doing so. After deleting the program, you must also remove any references to the program in the application menu.

To delete a program, right-click the program and then choose Delete. The system prompts you to confirm the operation. Click Yes. The system deletes the program.

Objects Tab

Use the Objects tab to view the tab-level and procedure-level objects associated with the programs defined in your system. You also can access the Object Details dialog box used for maintaining objects associated with a program or a tab.

Fig. 6.4
Program Manager - Objects Tab



The Objects tree hierarchy displays the program and associated tab objects for the program selected in the Program Manager browser. Select a tab object in the Objects tree hierarchy to display the procedure objects associated with that tab in the right-hand pane.

You can click the Widgets option at the bottom of the Objects tab to display widgets associated with the selected item. For details of configuring widgets, see “Widget Details” on page 53.

Note A program can have objects and widgets. Objects are represented by tabs—for example, Details, Further Details, and so on. Widgets are non-database fields, such as the text in a field for address details.

To add a new tab object to a program, right-click the program in the Objects tree hierarchy and then choose Edit. (Or, to add a new procedure to a tab object, select a tab object.) The Object Details dialog box displays, showing fields appropriate to tabs or procedures.

Note You can also copy details of an existing program entry and edit it as required. This is useful if you want to customize programs for different users. To copy a program, select the program in the List tab and then click Copy on the toolbar or menu. The Details screen displays with the option to Copy only page objects (tab objects only) or Copy all objects (tab and procedure objects).

Object Details Dialog Box

Use the Details tab to describe tabs or procedures and to specify their behavior. The fields available in this box change according to whether a tab or a procedure is selected in the Program Manager. Use the Labels tab to specify a label for a tab or procedure.

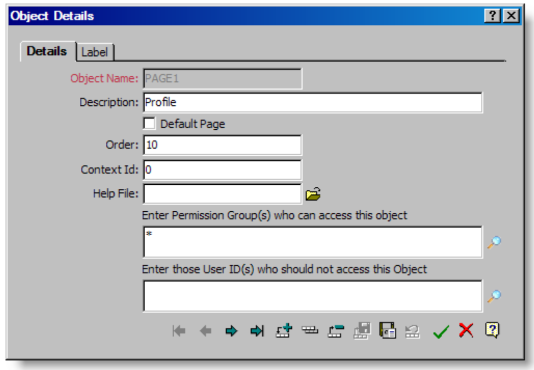


Fig. 6.5
Object Details

Object Name. Enter the name of the object. For example, type PAGE 1 for the first tab in the program interface. Once the record is saved, the object name cannot be changed.

Description. Enter a brief description of the object.

Default Page. Select the check box to indicate that the tab page should display when users run the program. Only one default tab page is allowed for a program interface. (Tab only.)

Context ID. Enter the context ID number for the tab screen. This ID is used to map the tab screen with the help system. (Tab only.)

Help File. Enter the path and name of the context-sensitive help file that should open when the help is invoked. If the default help file is to be used, skip this step. (Tab only.)

Object Type. Enter the type of procedure object. (Procedure only.)

The types (File, Edit, View, and Go To) represent the menus on the main menu bar. A menu object can be invoked from three places (a right-mouse click in the browser, from the toolbar, and one of the submenus). The submenus change according to the context. If you choose the Add command on the File menu, the object will be added to the File menu on the menu bar.

Internal Procedure. Enter the name of the internal procedure if required. For details, contact QAD Support. (Procedure only.)

Order. Enter a value to represent the sequence in which the tab should display, using the format [*Order Number*]0. For example, to display the tab as the first tab from the left in the program interface, enter `10`.

Display in Toolbar. Select this check box to display the option in the toolbar.

Display in Menu. Select this check box to display the option in the menu.

Default Action. Select the check box to have the option execute automatically when users start the program. Only one default action is allowed per object/tab page.

Permission Groups. Specify the permission groups permitted to access the object. By default all permission groups (*) are given access.

User IDs. Specify the users you want to prevent from accessing this object. If a user is a member of a group listed in the Permission Groups field but is specifically excluded in this field, the exclusion takes precedence.

Widget Details

Use the Widget Details box to describe widgets.

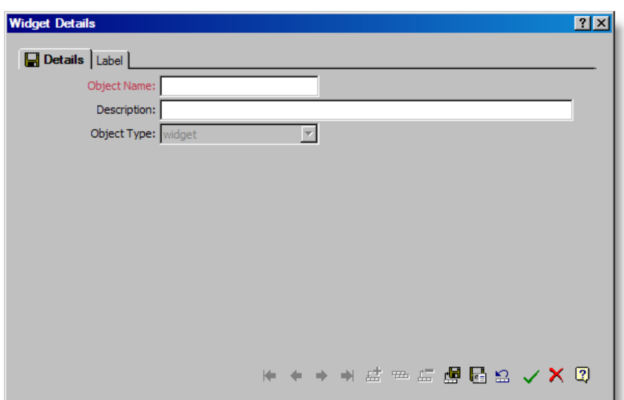


Fig. 6.6
Widget Details

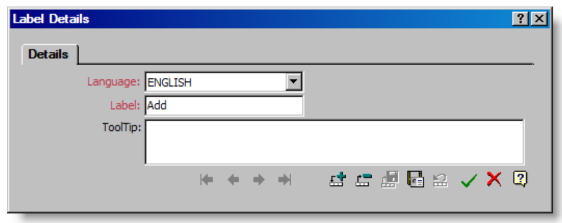
Object Name. Enter the field name of the widget; for example, `lbl_contact_toolbar`.

Description. Enter a description for the widget.

Label Details

Use the Label Details tab to specify a label for a tab object or procedure object. Tab labels display as text in the tabs. For procedure objects, labels display in the toolbar and menu.

Fig. 6.7
Label Details



Language. Enter the supported language for the label. When logging in to the system, users choose a language. The label specified for the object displays.

Label. Enter the label in the specified language.

Tooltip. Enter the Tooltip for the label.

Menu Manager

Use the Menu Manager to maintain system menus and shortcuts to executable programs, and to assign menus to users and permission groups.

Depending on their roles within an organization, users typically have different access privileges to system menus. When a user logs in to the system, the application menu displays only those menus and associated shortcuts that are appropriate for that user. You use the Menu Manager to configure system menus and assign them to your system users.

Figure 6.8 displays a typical menu and its shortcuts.

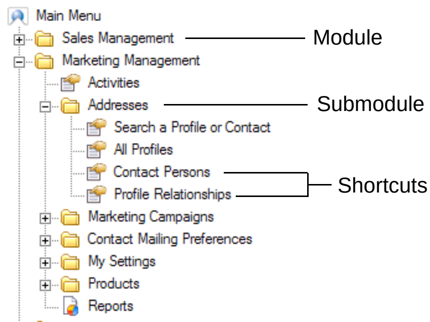


Fig. 6.8
System Menu

A menu consists of the items described in the table below.

Menu item	Description
Menu	A list of options arranged in a tree hierarchy that displays in the left pane of the main application window. A menu contains modules, submodules, and/or shortcuts to executable procedures.
Module	Containers that hold submodules and shortcuts to executable programs. In the tree hierarchy, modules occupy the top level. Modules can be expanded or collapsed to view or hide the submodules and program shortcuts they contain.
Submodule	Containers within a module that hold shortcuts to executable procedures and/or their submodules. Submodules, like modules, can be expanded or collapsed.
Shortcut	Shortcuts to executable system procedures or third-party procedures. A user clicks a shortcut to invoke an executable procedure, which usually starts its program in the right main window pane.

You can create menus for individual users and for permission groups. Menus are assigned to users and permission groups through user profiles. A user can be assigned more than one menu; if a user has multiple menus assigned, the user can select which menu to use during login. The system determines the menus that are available for a user by using the login ID.

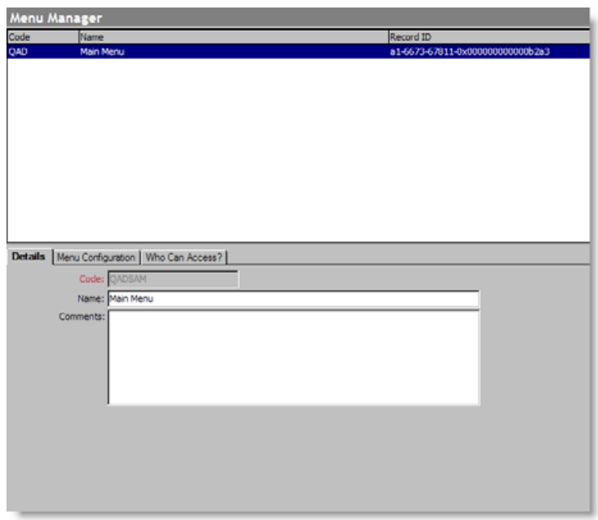
To access the Menu Manager, choose Main Menu|Settings|System|Menu Manager.

Note You can also define menus by using the Copy Menu Wizard to copy an existing menu, and then edit the menu details as needed. For details, see “Copy Menu Wizard” on page 63.

Typically defining a menu consists of three steps:

1. Define the menu in the system by providing basic details (Details tab). See “Defining a Menu” on page 56.
2. Define the modules, submodules, and shortcuts for the menu (Menu Configuration tab). See “Configuring the Menu” on page 57.
3. Associate the menu with users and permission groups, as required (Who Can Access? tab). See “Attaching Users and Permission Groups” on page 63.

Fig. 6.9
Menu Manager



The browser displays the menus already defined in the system.

Defining a Menu

Use the Details tab to define basic information for the menu you want to create.

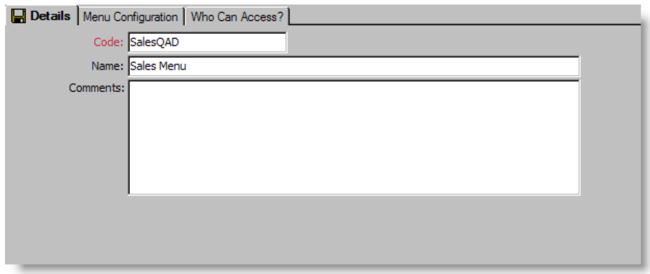


Fig. 6.10
Details Tab

Code. Enter a unique code for the menu.

Name. Enter a name for the menu.

Comments. Enter any comments for the menu as required.

Configuring the Menu

Use the Menu Configuration tab to define the menu hierarchy: the modules, submodules, and shortcuts in the menu and their arrangement.

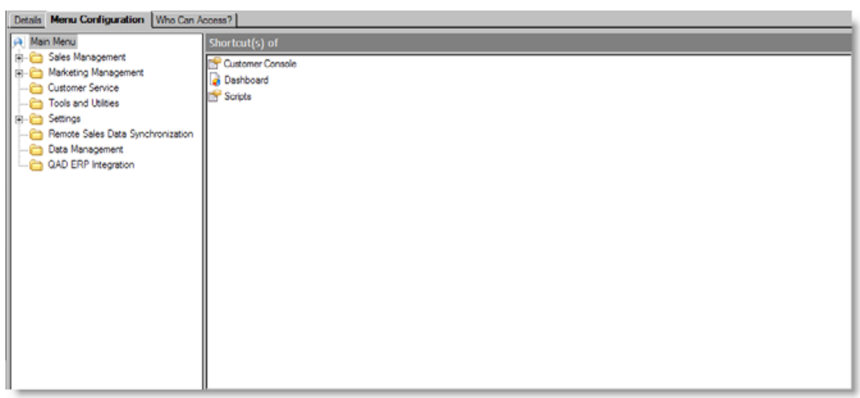


Fig. 6.11
Menu Configuration Tab

The left-hand pane displays the menu tree hierarchy consisting of the modules and submodules. The right-hand pane displays the shortcuts associated with the module or submodule that is currently selected in the left-hand pane.

The process of defining a menu consists of:

- Adding a module or submodule

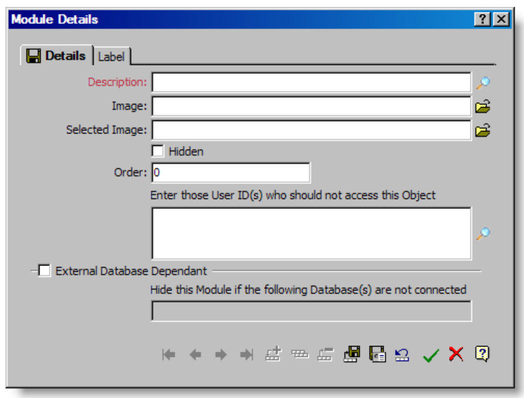
- Adding shortcuts to modules or submodules

Adding Modules or Submodules

Select a module or submodule in the left-hand pane, and then right-click the pane and choose Add Module. The Module Details dialog box displays.

Note When maintaining menus, only executable programs and objects that are registered with the Program Manager can be used.

Fig. 6.12
Module Details



1 In the Description field, enter a name for the module.

2 In the Image field, enter the image you want to display before the module label on the application menu; for example, `images\browse.bmp`.

   Note Images are stored in the `/images` directory in the QAD CRM installation directory. Images must be `.bmp` or `.ico` format.

3 In the Selected Image field, enter the image you want to display when the user selects the module. For example, you might use an image of an open folder to indicate the item is selected.

4 Select the Hidden check box to hide the module on the menu.

5 In the Order field, enter the order in which the module must appear in the menu. For example, to have the module display as the second module from the top, enter `20`.

6 Enter the IDs of any users who should not have access to this object.

7 Select the External Database Dependant check box if the module depends on the availability of one or more databases. In the Hide the Module if the following database(s) are not connected field, enter the name of the relevant databases. When these databases are not available, the system does not display the module in the menu.

Adding Shortcuts to Modules or Submodules

Select the module or submodule in the left-hand pane to which you want to add a shortcut. Existing shortcuts associated with the selected module display in the Shortcuts pane. Right-click the Shortcuts pane and choose Add Shortcut. The Shortcut Details dialog box displays. The dialog box has three tabs, used for the following:

- Defining shortcut details (Details)
- Defining labels for the shortcut (Label)
- Defining objects for the shortcut (Objects)

Defining Shortcut Details

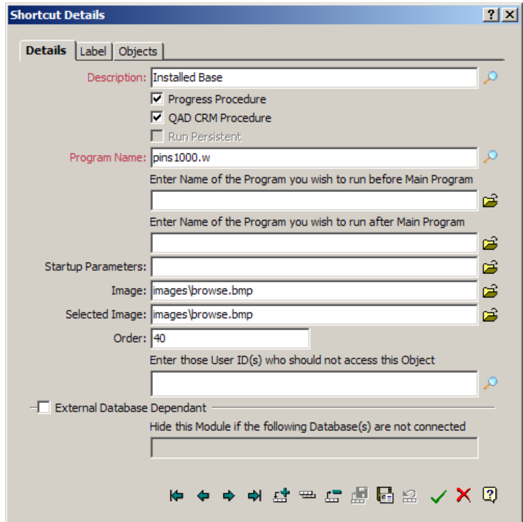


Fig. 6.13
Shortcut Details

1. In the Description field, enter a brief description of the shortcut.
2. Select the Progress Procedure check box if the program whose shortcut you are creating is a Progress procedure.
3. Select the QAD CRM Procedure check box if the program is a QAD CRM system procedure.
4. Select the Run Persistent check box if you want to run the program persistently.
5. In the Program Name field, enter the name of the main program (`*.w` file) for the shortcut to call.
6. In the Enter Name of Program to Run before Main Program field and the Enter Name of Program to Run after Main Program field, enter the name of the programs you want to run before and after the main program, respectively.
7. In the Startup Parameters field, enter the parameters that the program must use while starting.

8 In the Image field, enter the image you want to display before the module label on the application menu. Images are stored in the `/images` directory in the QAD CRM installation directory.

Note Images must be `.bmp` or `.ico` format.

9 In the Selected Image field, enter the image you want to display when the user selects the module. For example, you might use an image of an open folder to indicate the item is selected.

10 In the Order field, enter the order in which the module must appear in the menu. For example, to have the module display as the second module from the top, enter `20`.

11 Enter the IDs of any users who should not have access to this object.

12 Select the External Database Dependant check box if the module depends on the availability of one or more databases. In the Hide the Module if the following database(s) are not connected field, enter the name of the relevant databases. If these databases are not available, the system does not display the module in the menu.

Defining Shortcut Labels

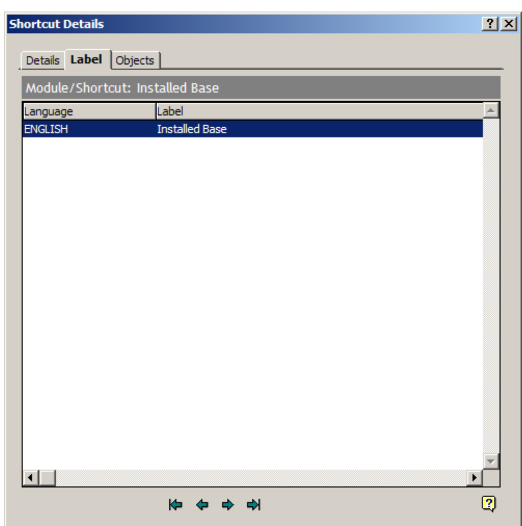


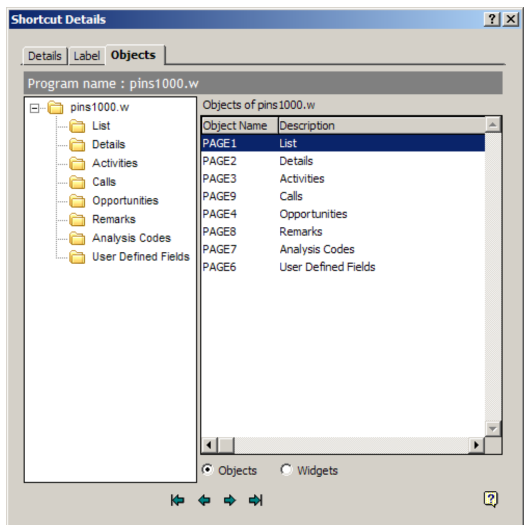
Fig. 6.14
Shortcut Details - Labels Tab

Right-click the list box and choose Add Label from the menu. A blank row opens up in the list box. Enter the language of the label (for example, ENGLISH) and the text of the label.

Note You can enter labels in different languages if your system is configured for multi-language support. The system will display the label using the language selected for the current session using the Application Language drop-down list on the Logon screen.

Defining Shortcuts

Fig. 6.15
Shortcut Details - Objects Tab



Use the Shortcut Details – Objects tab to configure the menu shortcuts by either adding an object or tab to a shortcut, or adding a procedure to an object.

Note For details about programs and objects, see “Program Manager” on page 48.

1 Do one of the following:

- To add an object or a tab to a shortcut, select the shortcut in the left-hand pane to display its associated objects in the right-hand pane.

- To add a procedure to an object, select an object (folder) in the left-hand pane to display its associated procedures in the right-hand pane.

2 Select the Objects option or the Widgets option.

3 Right-click the right-hand pane and choose Add from the menu.

4 Configure the object, tab, or procedure as appropriate. For details on configuring objects, see “Object Details Dialog Box” on page 51.

Attaching Users and Permission Groups

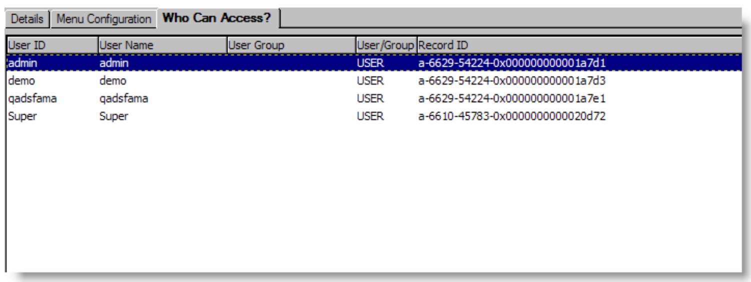


Fig. 6.16
Who Can Access? Tab

Use the Who Can Access? tab to associate users and permission groups with the menu. This tab displays the users and permission groups currently attached to the menu. Right-click the browser to access commands for maintaining associations between menus and users/permission groups.

To create a permission group, right-click the Select Permission Group look-up box and choose Add.

Note A user can be assigned a menu and belong to a permission group that is assigned a different menu. In this case, the user has access to at least two menus. When the user logs in, the logon screen displays all the menus associated with the user, allowing the user to decide which menu to use during the session.

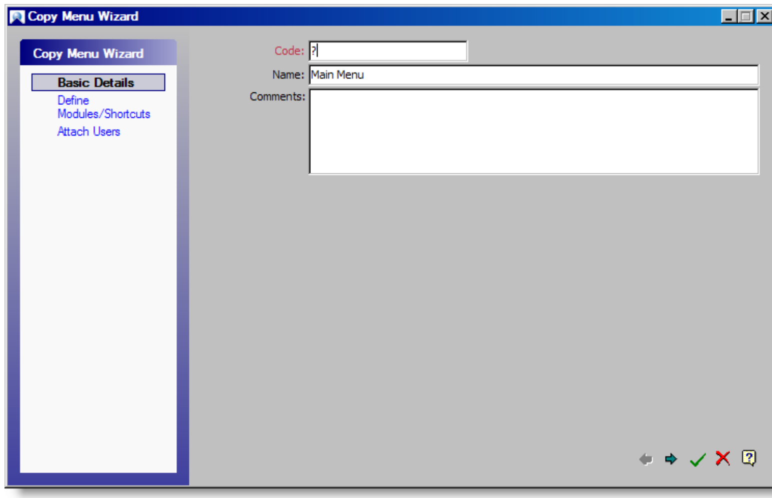
Copy Menu Wizard

Use the Copy Menu Wizard to copy an existing menu to use as the basis for the new menu.

To access the Copy Menu Wizard, right-click an existing menu in the Menu Manager browser and choose Copy.

Note The Wizard copies a menu but not the users attached to the menu.

Fig. 6.17
Copy Menu Wizard



Creating a menu using the Copy Menu Wizard consists of the same three steps as creating a menu manually:

1. Specify basic details of the menu (Basic Details page). This step is mandatory.
2. Define modules and shortcuts by using the arrows to move the items from the Available Modules/Shortcuts list into the Selected Modules/Shortcuts list (Define Modules/Shortcuts page). This step is optional.

   Note Make sure you arrange the menu items in the order you want before saving the menu.
3. Attach users and/or permission groups to the new menu (Attach Users page). This step is optional.

Field Object Manager

Use the Field Object Manager to maintain the database table fields that display on the system dialog boxes and screens. You can manage identifying information, field colors, label characteristics, hyperlink behavior, and audit status.

You can also define permissions for individual fields on screens and dialog boxes to control the permission groups and users that can view and update fields in a database record.

For example, access to information about product cost price or customer credit limits may be appropriate for some systems users, but not others. You can restrict access to these fields as appropriate by using field security. In addition, organizations can hide unwanted fields from screens to reflect their business requirements—for example, some organizations choose to remove customer turnover from their system implementations.

To access the Field Object Manager, choose Main Menu|Settings|System|Field Object Manager.

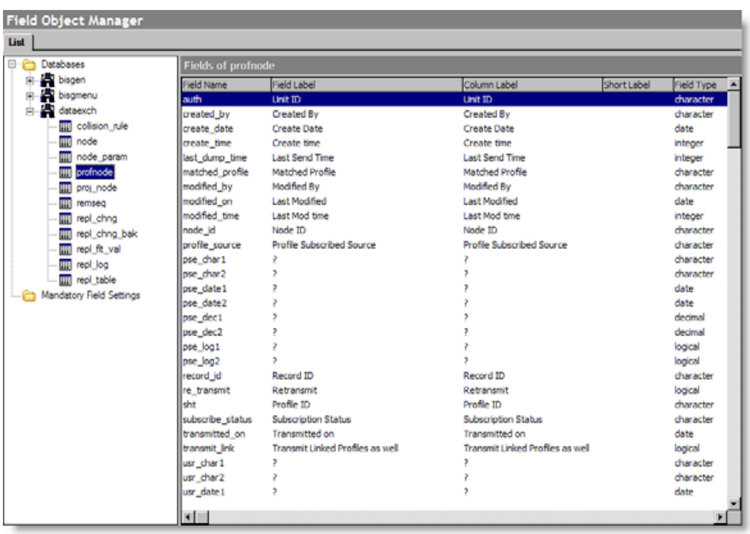


Fig. 6.18
Field Object Manager

The Field Object Manager screen has two panes. The left-hand pane shows the system databases arranged in a tree hierarchy and the Mandatory Field Settings link. The right-hand pane shows the fields within the selected database table.

Note For details on changing colors for mandatory fields, see "Field Object Manager" on page 65.

Expand a database to view the database table names. When a database table name is selected, the right-hand area displays the field names, associated field label, type, and format.

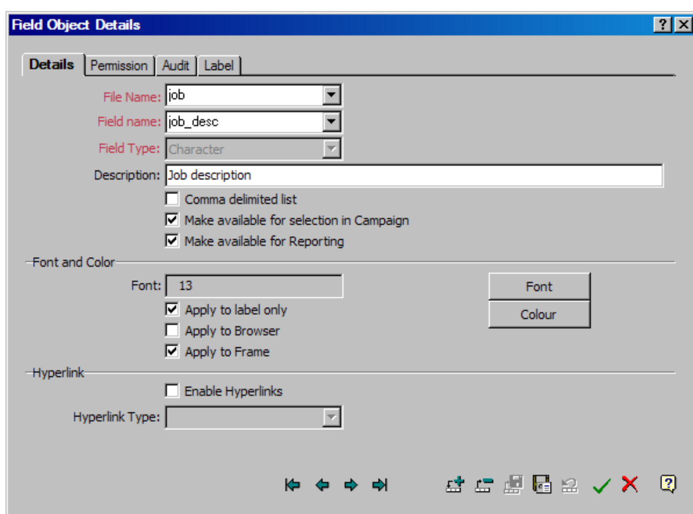
To specify characteristics for a field, right-click the field and choose Edit.

Note The right-click menu also contains options for adding and deleting.

Details

Use the Details tab to specify basic characteristics of the field, such as associated database table and field name, description, availability in other modules, font and color, and so on.

Fig. 6.19
Field Object Details - Details Tab



File Name. Enter the name of the database table for the field. The drop-down list contains the table names contained within the selected database.

Field Name. Enter the name of the field.

Description. Enter a description for the field.

Comma Delimited List. Select the check box to allow comma delimited values to be entered into the field.

Make available for selection in Campaign. Select this check box to make this field available for building campaigns.

Make available for Reporting. Select this check box to make this field available in user-defined queries and reports.

Specify font and color settings as required using the Select Font and Select Color dialog boxes. Click Font and Color, respectively, to access these boxes.

Apply to label only. Select the check box to apply the specified font and color settings to the field label only.

Apply to browser. Select the check box to apply the specified font and color settings to the field as it displays in a column in a browser.

Apply to frame. Select the check box to apply the specified font and color settings to the field as it displays in a frame.

Specify Hyperlink settings as required.

Enable Hyperlinks. Select the check box to enable hyperlinks for this field. Selecting this field enables the Hyperlink Type drop-down list.

Hyperlink Type. Select a hyperlink type to use for the field.

Email. Launches the mail client.

Web Access. Launches the web browser and navigates to the Web address specified.

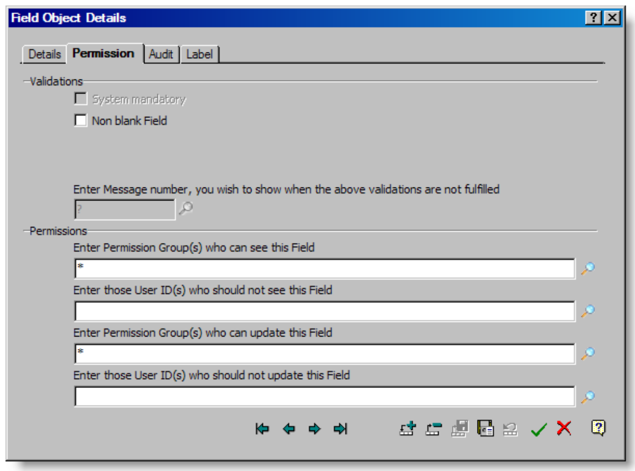
File. Executes the specified file.

Run Program. Executes the specified program.

Permission

Use the Permission tab to maintain permissions for permission groups and users. For example, you can specify that only the Sales team can see a field, update the field, or both. Or you can specify individual users that do not have access or modification privileges for a field. By default, all groups have access and modify permissions for all fields.

Fig. 6.20
Field Object Details - Permission Tab



System mandatory. Select the check box to indicate if the field is defined as mandatory. System mandatory fields are used by the business logic in the system and require a value. System mandatory fields must be populated before the information on the screen or box on which they are located can be saved.

You also can set colors and fonts for mandatory fields. For details, see "Mandatory Field Settings" on page 71.

Non blank field. Select the check box to indicate that the field must contain an entry. The business logic used by the system does not stipulate that non-blank fields must contain a value—this is up to the system user. Selecting the check box enables the Enter Message Number field.

Enter Message Number. Enter the number of the system message to display if the System Mandatory and/or Non Blank Field validations are not fulfilled when the screen or dialog box containing the field is saved.

Specify Permissions as required.

Changing Field Permissions

To change permissions for a field:

1. Determine the database table that the field belongs to by clicking the field and then pressing Ctrl+F5. The Object Details box displays.

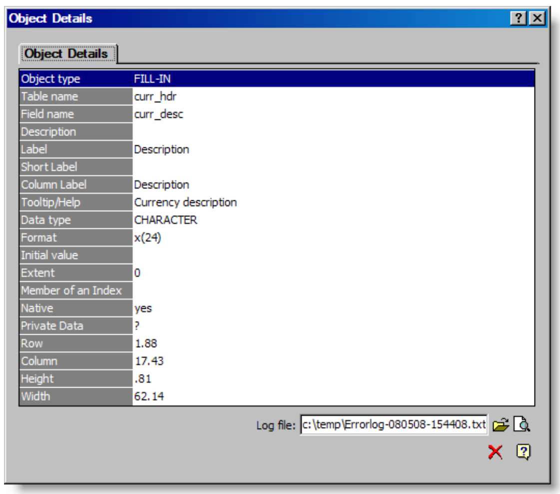


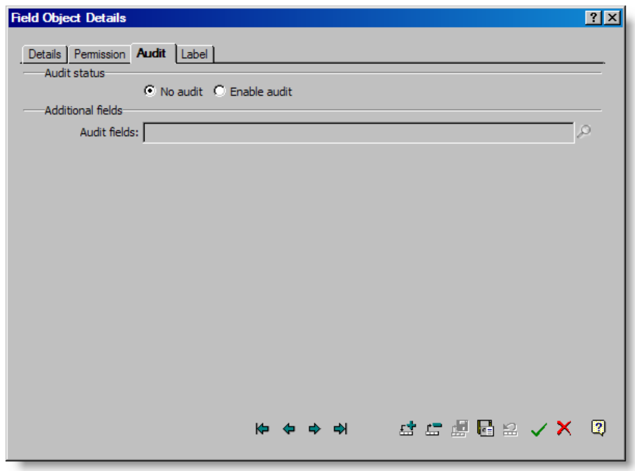
Fig. 6.21
Object Details

2. Determine the table name and field name of the field you want to specify permissions for.
3. Select Main Menu|Settings|System|Field Object Manager and locate the table in the database listing.
4. Select the table name, and then right-click the field name and choose Edit. The Field Object Details dialog appears.
5. Click the Permissions tab and specify permissions as appropriate.

Audit

Use the Audit tab to specify auditing behavior for fields in the system. Auditing a field permits changes to a field to be tracked for various purposes. For example, you can audit how frequently an activity start date is changed; or how long it takes for an opportunity to move from the inquiry stage to the quote stage.

Fig. 6.22
Field Object Details - Audit Tab



Audit Status. Select the audit options as required.

No audit. Select this option to indicate auditing is not enabled for this field.

Enable audit. Select this option to enable auditing for this field. Selecting this option enables the Audit Fields field. Enter any additional fields to be audited.

Label

Use the Label tab to specify label and Tooltip settings for the field.

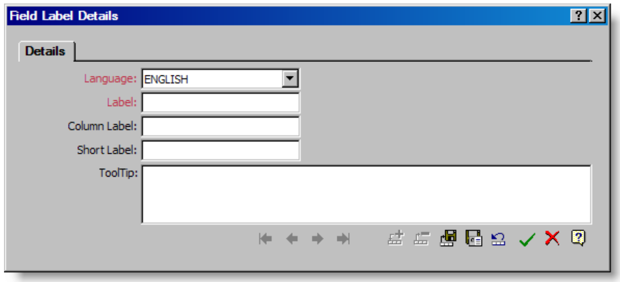


Fig. 6.23
Field Object Details - Field Label Details

Language. Specify a language for the field label.

Label. Enter the field label.

Column Label. Enter the column label. The column label is used in the system browsers.

Short Label. Enter a short label. The short label is used when space restrictions prevent the full label from being used; for example, if the label is translated.

Tooltip. Enter the Tooltip text for the field. The Tooltip displays when the mouse cursor is on the field. Users can enable or disable the display of Tooltips if they have permission.

Mandatory Field Settings

Use the Mandatory Field Settings dialog box to specify the color and other characteristics of mandatory fields on screens and dialog boxes so that these fields are easier to see.

To access the Mandatory Field Settings dialog box, choose Main Menu|Settings|System|Field Object Manager. Then click the Mandatory Field Settings item in the tree hierarchy.

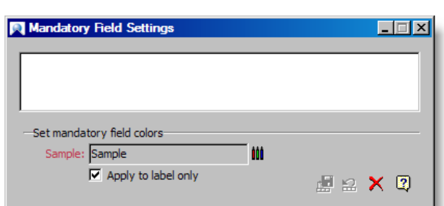


Fig. 6.24
Mandatory Field Settings

Click the Crayon icon next to the Sample field to display the Select Color dialog box. Choose a foreground and background color as required. Use the Edit button to customize available colors.

Select the Apply to Label Only check box to apply the specified color to the label only; or clear the check box to apply the specified color to the field entry also.

Note After changing colors for mandatory fields, you must exit your current session and log in again for the changes to take effect.

Chapter 7

System Configuration

This section describes how to configure settings for various modules within the QAD Customer Relationship Management (QAD CRM) application. It discusses the following topics:

Overview

When you start using QAD CRM, you may want to change some of the default settings or configure settings according to specific business unit and user requirements. The System module helps you maintain these settings. To access the System module, go to Main Menu|Settings|System. This displays the list of functions and modules for which you can maintain and configure settings.

Most of the screens in the System module are divided into two parts—the top half is a browser displaying the list of records available in the database, while the bottom half opens the selected record in edit mode.

If you have the required edit permissions for this module, you can edit a record selected in the browser in any of the following ways:

- Click the Edit button on the toolbar.
- Right-click and choose Edit.
- Choose Edit from the File menu.

However, if you do not have edit permissions for this module, the Edit option is unavailable.

User Defined Fields

You can use the user-defined fields option to add frames and fields to the system modules depending on your specific and unique requirements. User Defined fields can be set for the following modules and sub-modules:

- Profiles
- Contacts
- Opportunities
- Quotes (in Opportunities)
- Orders (in Opportunities)
- Opportunity Lines
- Products
- Installed Base
- Customer Service

- Campaign Response (in Target Details window)

For example, you can create a user-defined frame and associated fields for the All Profiles module that lets end users edit the credit limit of the selected customer directly from the User Defined Fields tab. To assist in data entry, you can associate look-up tables to field displays. You can also configure user-defined frames to validate data entered by end users. To implement field-level security, you can set access permission for fields using the Field Object Manager. For details on the Field Object Manager, see “Field Object Manager” on page 65.

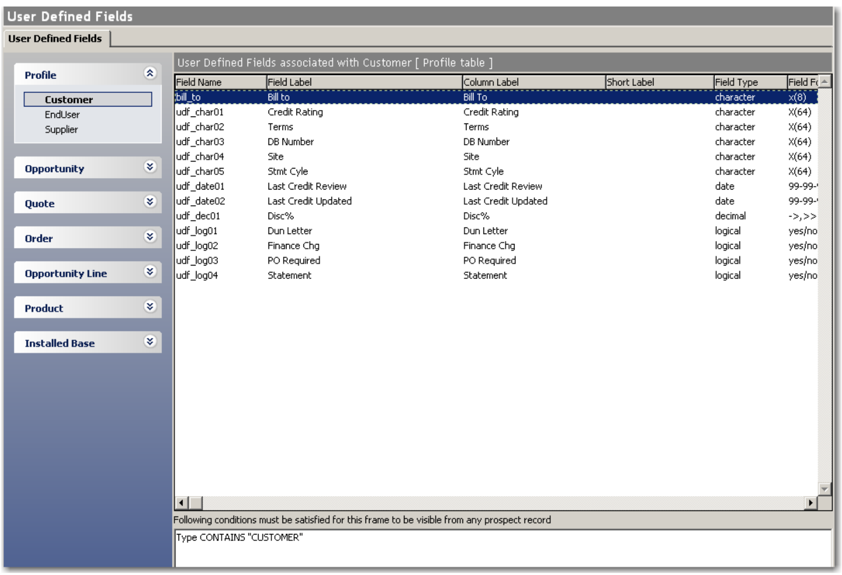


Fig. 7.1
User Defined Fields

To create new user-defined fields, you can either use fields from the database or choose from the following extra user-defined fields available:

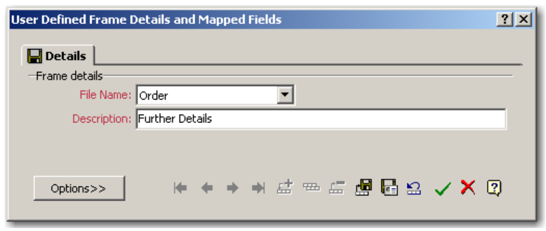
- 50 character type fields
- 20 decimal type fields
- 15 date fields
- 15 logical fields
- 10 sections

The User Defined Fields screen is divided into two parts. The left pane displays the list of modules and the user-defined frames added under them. The right part displays the list of fields available in each user-defined frame. You can add, edit, copy, and delete frames and fields through this screen.

Maintain Frames

You can maintain frames from the left pane of the User Defined Fields screen. Right-click in this area and choose Add Frame. The User Defined Frame Details window displays.

Fig. 7.2
User Defined Frame Details



Details

Use the Details tab to record the description for a new user-defined frame.

> *File Name.* Use the drop-down list to select the module under which to place the new user-defined frame.
>
> *Description.* Enter a name for the new user-defined frame you are creating.
>
> ***Note*** Both fields are mandatory.

Click Options to expand the window and define conditions that the system applies while displaying user-defined fields.

Example You want the user-defined field tab to display only for those profiles that are of type `Customer`. You can create these settings by defining a condition where `Type` (Field Name) `Contains` (Operator) `Customer` (Field Value).

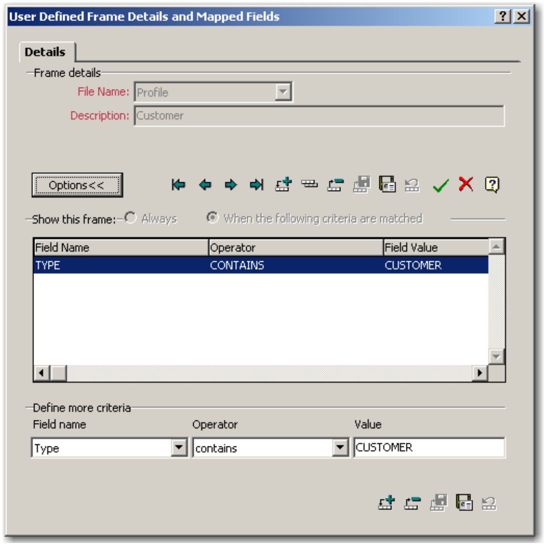


Fig. 7.3
User Defined Frame - Options

Click Save to create a new user-defined frame in the module you selected. To verify, you can navigate to the relevant module and view the new frame under the User Defined Fields tab. The new frame appears as a new tab as indicated in the figure below.

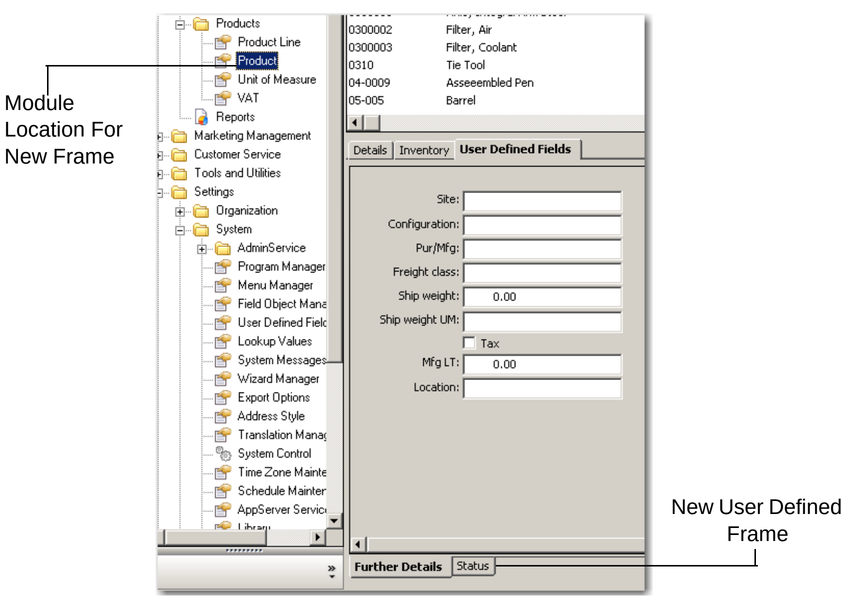


Fig. 7.4
New User Defined Frame

After defining a frame you need to add fields to it. You can then verify that the new fields you create appear in the user-defined frame for that particular module.

Maintain Fields

You can add fields to the new frame using two different methods:

- Add Field—Lets you add field-level details such as name, description, type and associated values.
- Design Frame—Lets you add field objects and provides a visual representation of the changes to your frame.

Add Field

The Add Field option is more suited to users who have good knowledge of the system and its databases. Since this option does not provide any visualization of the fields you create, you must be able to visualize the size and placement of field objects within a frame. To use this option, do the following:

1. Select the new frame from the left pane of the User Defined Fields screen.
2. Right-click in the right part of the screen and choose Add Field. The Field Details for Frame window displays.

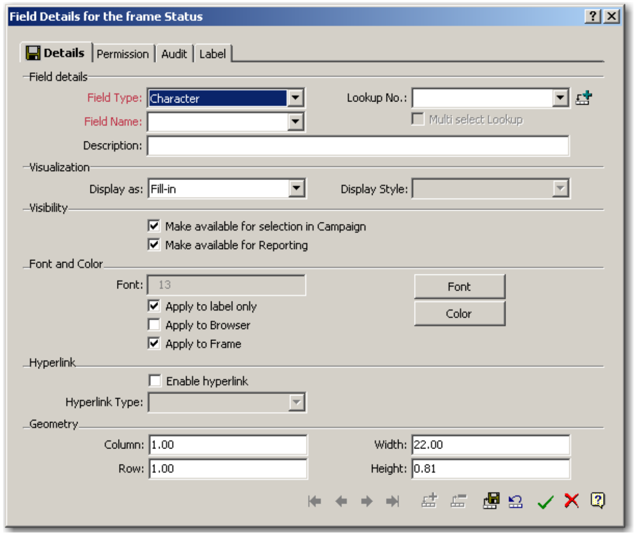


Fig. 7.5
Add Field Details for Frame

3 Enter the required field object details on all the tabs—Details, Permission, Audit, and Label.

4 Save the settings.

You can now view the user-defined fields you added through the Preview Frame option. You can also navigate to the relevant module and verify the user-defined fields.

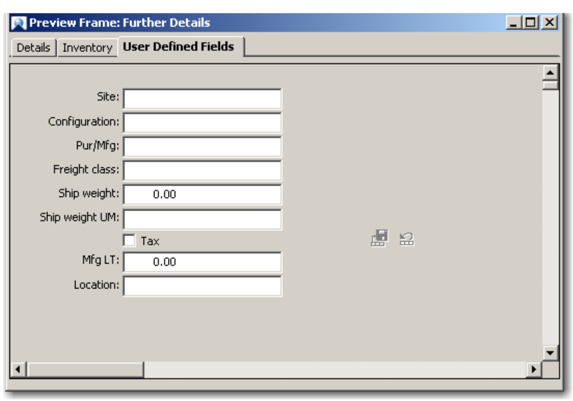
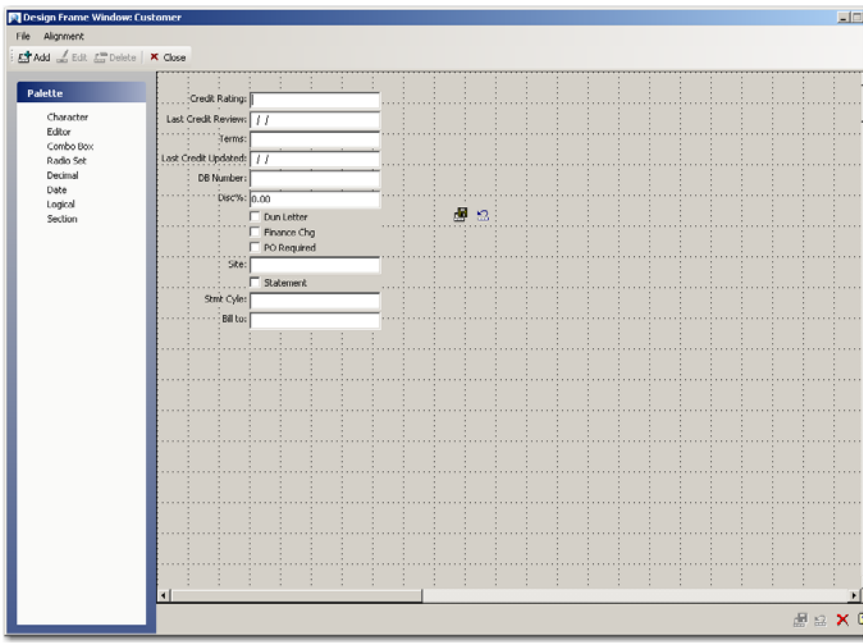


Fig. 7.6
Preview Frame

Design Frame

The Design Frame option lets you use a design grid, add fields to a new frame, and place those fields appropriately. Even if you have defined fields using the Add Field option, the Design Frame can help in the placement of those fields. The design grid also gives you the option to align fields and check their placement in a dynamic setting.

Fig. 7.7
Design Frame



To use the Design Frame option, do the following:

1 Select the new frame from the left pane of the User Defined Fields screen.

2 Right-click and choose Design Frame or click the Design Frame button on the toolbar. The Design Frame window displays.

3 Select the field object types that you want to add from the Palette on the left. This automatically opens the Add Field Details for Frame window.

4 Add field level details in the Add Field Details for Frame window.

5 Select field objects and use their handles to move them or alter their size. You can use the Alignment option from the menu to fix the alignment of the selected fields.

6 Save the settings.

You can now view the user-defined fields you added to a new frame through the Preview Frame option. You can also navigate to the relevant module and verify the user-defined fields.

Lookup Values

The Lookup Values option lets you to create new lookups and add values to existing ones.

The Lookup Values browser displays the list of lookups available in the database. You can add, edit, copy, and delete lookups through this screen.

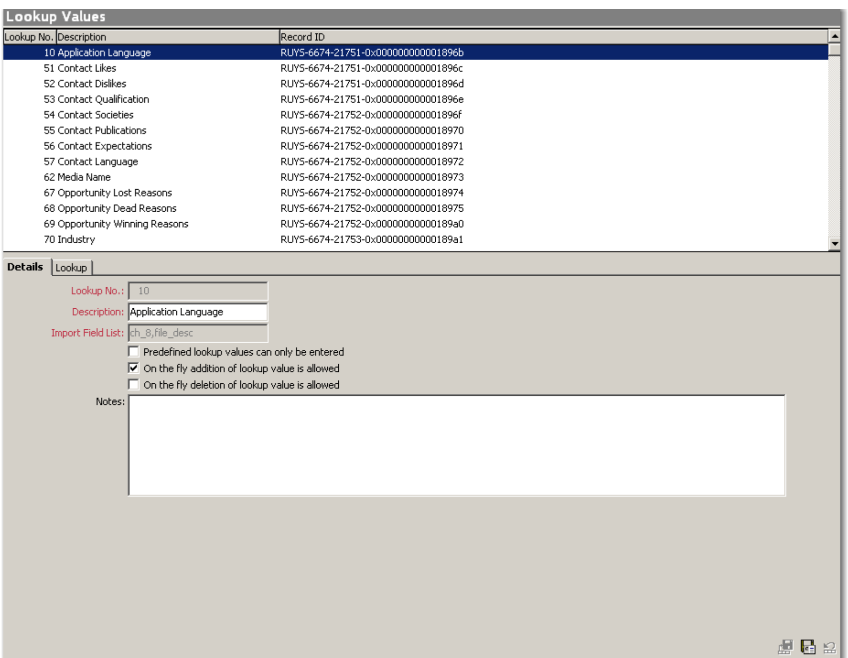


Fig. 7.8
Lookup Values

Details

Use the Details tab to record the complete description of a new lookup.

Lookup Number. Enter a unique number for the new lookup you are creating.

Description. Enter a description for the lookup.

Import Field List. The Import Field List contains information about the fields that the system can import. Enter the column values to be populated through the Import File option.Use commas to enter multiple values.

Example For a lookup based on regions, this field may contain values `Ch_8,file_desc.` This means that the file to import will contain information in this format—an eight-character name followed by a file description, as shown below.

```
APAC,Asia Pacific Region
CAN,Canadian Region
EUR,European Region
PAC,Pacific Region
US,United States Region
```

Note The file to import must be a plain text file, and should not have headers or labels.

Predefined lookup values can only be entered. Select this check box if you want that wherever in the system the current lookup is used, the user can only enter values that are defined here. This option prevents the end user from entering new values directly into an associated field.

On the fly addition of lookup value is allowed. Select this check box to give the end user the flexibility to add new values to the lookup table from wherever this lookup is accessed.

On the fly deletion of lookup value is allowed. Select this check box to give the end user the flexibility to delete values from the lookup table from wherever this lookup is accessed.

Notes. Enter notes related to the lookup you are creating.

Lookup

Use the Lookup tab to add values to the lookup table.

Through the Lookup Values screen you can also import data from an external source by importing a comma-delimited text file in comma-separated values (.csv) format to create records in a lookup table.

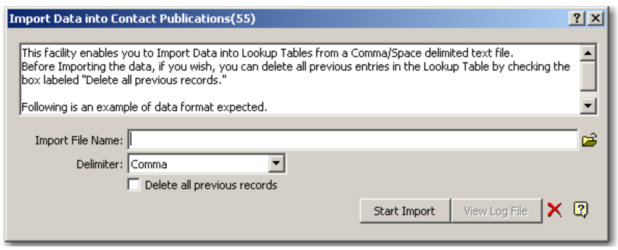


Fig. 7.9
Import Data

To import records, complete the following fields:

Import File Name. Enter the file location from which to import the data for the lookup table values.

Delimiter. Select the appropriate delimiter from the drop-down list.

Delete All Previous Records. Select this check box if you want to delete any previous entries in the lookup table.

Example If you are importing look up data for lookup number 54, the system will, during the import process, delete all previous lookup data for which lookup number is 54.

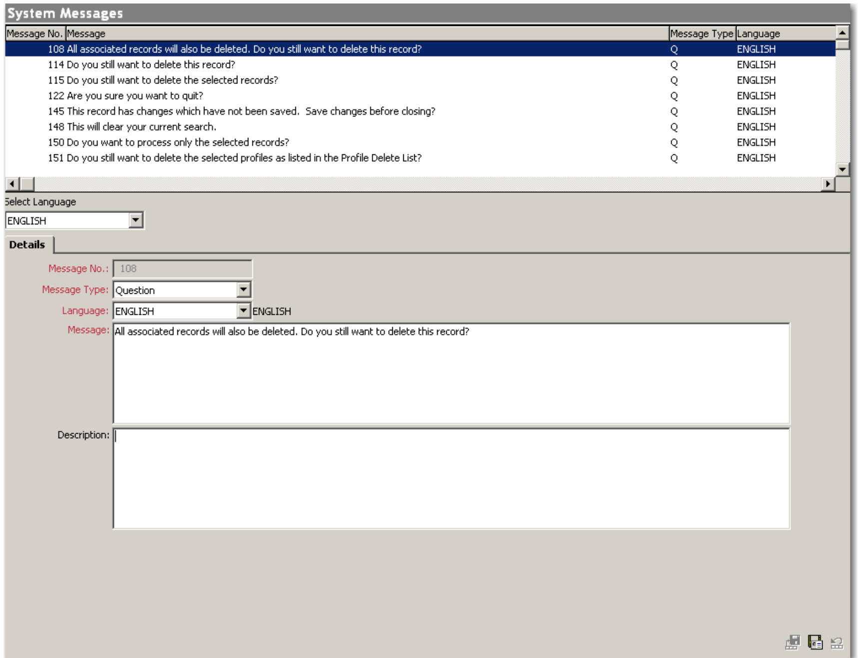
Click Start Import to start the import process. Once the import is complete, click View Log File to view the log file.

System Messages

You can use the System Messages option to create new messages or edit existing ones.

The System Messages browser displays the list of messages available in the database. You can add, edit, copy, and delete messages through this screen.

Fig. 7.10
System Messages



Details

Use the Details tab to record the complete description of a new message.

Select Language. Choose the display language for the new message using this dropdown. If you select the asterisk (*), the new message will display in all the languages supported by the system.

Message Number. Enter the message number of the new message you are creating.

Message Type. Select a message type from the drop-down list. The five options available are Information, Question, Error, Warning, and Informative Text.

Language. Select the language in which you want to create the new message.

Note The system gives you the option of displaying the same message in multiple languages. In such a case, the message number remains the same but multiple versions of the same message are saved in different languages. The end user sees the message display in the language specified during login.

Message. Enter the actual message content the system will display.

Description. Enter any additional description for the message.

Wizard Manager

The Wizard Manager lets you maintain wizards used in the system. Wizards help enter data in a logical, pre-specified format.

The Wizard Manager browser displays the list of wizards being used by QAD CRM. You can add, edit, and delete wizards through this screen.

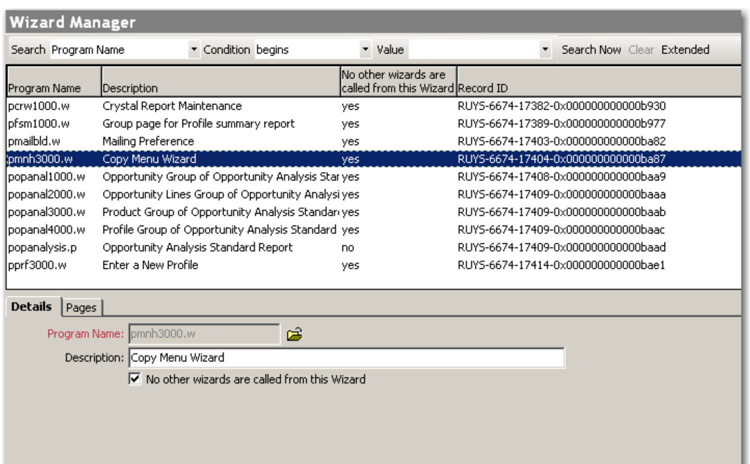


Fig. 7.11
Wizard Manager

Details

Use the Details tab to record the program name and description for a new wizard.

Program Name. Enter or choose the program name for the new wizard you are creating.

Description. Enter an appropriate description for the wizard.

No other wizards are called from this Wizard . Select this check box to confirm that the wizard you are creating will not be called from any other wizard in the system. If you leave this check box clear, it means the current wizard will have a parent-child relationship with one or more wizards in the system.

Pages

The Pages tab displays the pages or widgets used in a wizard depending on the radio button you choose. It also lets you add subsequent pages to a wizard through the Page Details window. You can also edit, copy, and delete wizard pages from here.

Details

Object Name. Enter the object name or the page number for the new page. The object name must be preceded by the word `PAGE` like `PAGE01`, `PAGE02`, and so on.

Description. Enter a description for the new page.

Message No. Use the lookup to choose the system message number that you want displayed as help text. The message that you specify here displays as a Tooltip when the end user runs the wizard and focuses on the page link.

Order. Enter the numeric order in which the new page is available in the wizard.

Context ID. Enter the context sensitive ID that links to the appropriate help topic in the system help file.

Help File. If you want to invoke a help file other than the default help file used in the system, click the folder icon to choose an alternate file. The Context ID should pertain to this file.

Smart Frame Name. Enter the name of the program that should run when users open the page through the wizard.

Table Name. Specify the database table where you want to store data gathered through the page.

Permission. Use the lookups to choose access rights for the page you are adding to the wizard. Enter an asterisk (*) in the Permission fields to give complete access to all user groups.

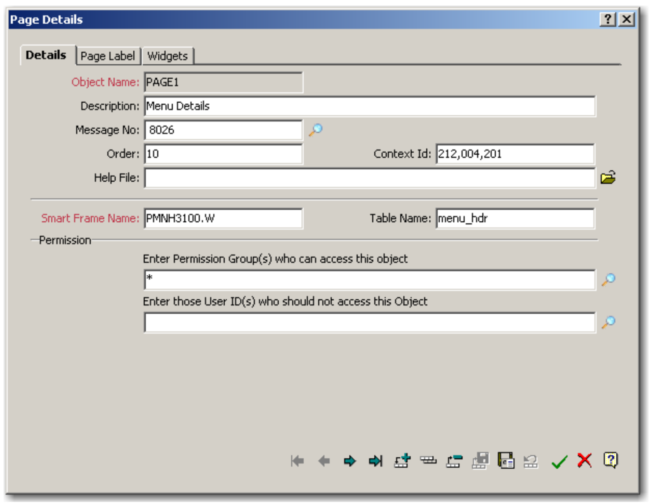


Fig. 7.12
Page Details

Page Label

Language. Select the language of the page label.

Label. Enter the text for the page label.

Tooltip. Enter a Tooltip for the page label. A Tooltip provides the end user with a description of the label.

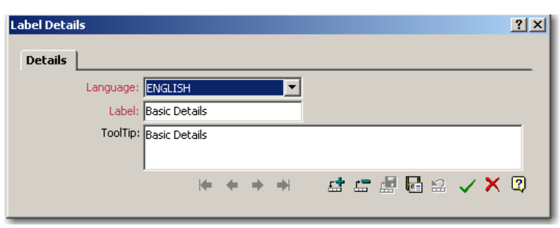


Fig. 7.13
Label Details

Widgets

Object Name. Enter the object name for the widget associated with the page.

Description. Enter a description for the widget.

Object Type. Select object type from the drop-down list.

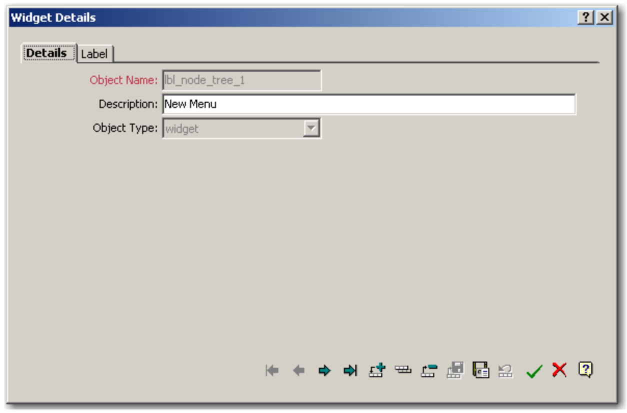


Fig. 7.14
Wizard Manager

Export Options

The Export Options screen lists the types of options available in the QAD CRM system to export data.

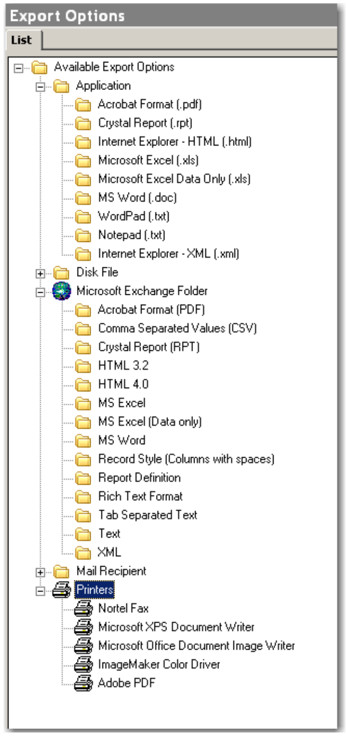


Fig. 7.15
Export Options

All browsers in the system let you export information to a selected output channel. Right-click and choose Export from any of the system browsers. This opens the Export Wizard, which guides you through the process of exporting data. For more details, see the Reports section of *User Guide: QAD Customer Relationship Management*.

All output formats in the system are mapped to the export capabilities of Crystal Reports. The Export Options screen therefore does not let you add or delete any options. You can only edit the options listed through the Export Option Details window.

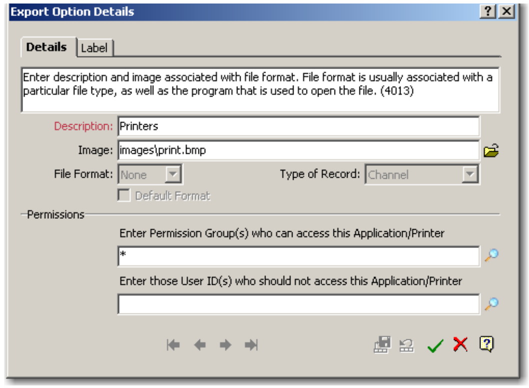


Fig. 7.16 Export Option Details

Select any export option. Right-click and choose Edit to display the Export Option Details window.

Details

Use the Details tab to change the description and image associated with the selected export file format. The image file you choose displays as the associated icon for the export option. You can also set permissions from this tab.

Label

Use the Label tab to add, edit, or delete labels for the listed export options.

Address Style

You can use the Address Style option to maintain the various forms of addresses used in the system. The system gives you the flexibility to define different address styles for different countries.

Example Suppose you have to post campaign letters to addresses both within your country, and overseas. For addresses belonging to your own country, you may not want to display the country name to save space on the mailing label. However, you require that all overseas addresses mention the country name as well. In such a case, you can define two address style options—one for inland addresses, and another one for overseas addresses.

The address style you define here is used throughout various modules in the system:

- In All Profiles—Details and Addresses tabs.
- In Contacts—Details tab and Print Mail Labels option.
- In Marketing Campaigns—Details tab in Media Source and Target Details window.
- In Settings—Details tab in Users and Business Units.
- In CSR Maintenance—Details tab.

The Address Style browser displays the list of address styles currently in use. You can add, edit, copy, and delete address styles through this screen.

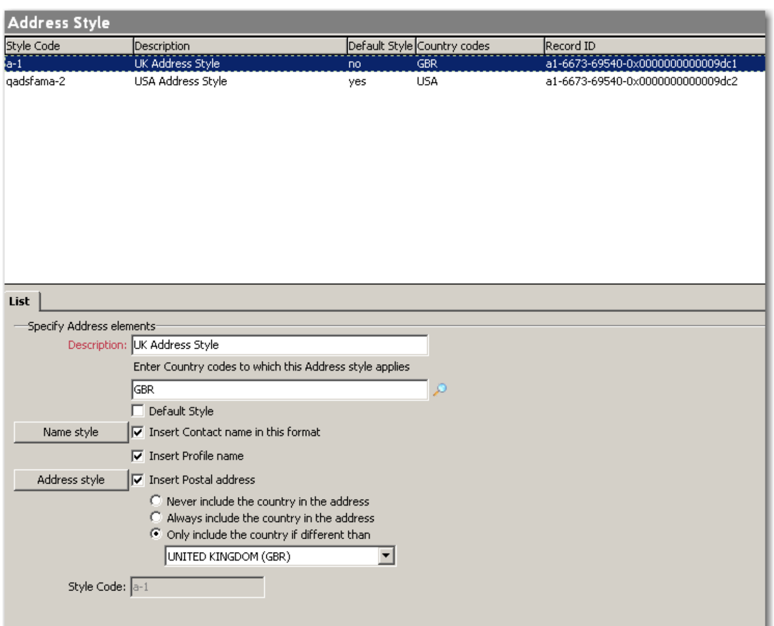


Fig. 7.17
Address Style

List

Use the List tab to record the elements of a new address style.

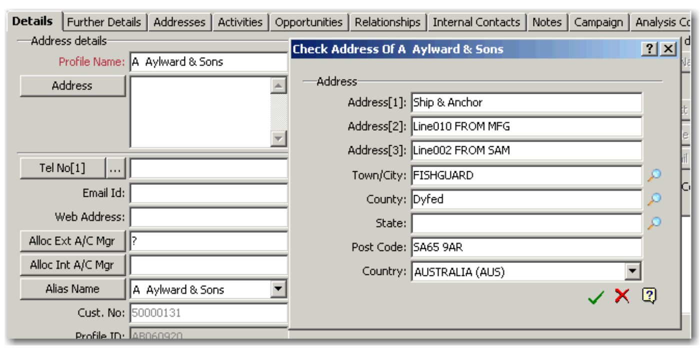
Description. Enter the description for the new address style you are creating.

Enter Country Codes to which this Address Style applies. Use the lookup to choose the codes for those countries in the system database to which the current address style applies. Use commas to enter multiple country codes.

Default Style. Select this check box if you want this to be the default address style for all addresses recorded.

Note If you have the Default Style check box selected but no address style is defined in the Address Style window, then the address editor in Main Menu|Sales/Marketing Management|Addresses|All Profiles|Details shows up blank. This is because the addresses displayed in Profiles are picked up by the system from the Address Style settings defined here.

Fig. 7.18
All Profiles: Blank Address Editor



Name Style. Click this button to display the Name Style window. Use this window to record the format in which you want the name to appear.

Insert Contact Name in this format. Select this check box if you want the contact name to appear in the format specified here.

Insert Profile Name. Select this check box if you want the profile name to be included in the address style you are creating.

Address Style. Click this button to display the Address Style window. Use this window to record the format in which you want the address to appear.

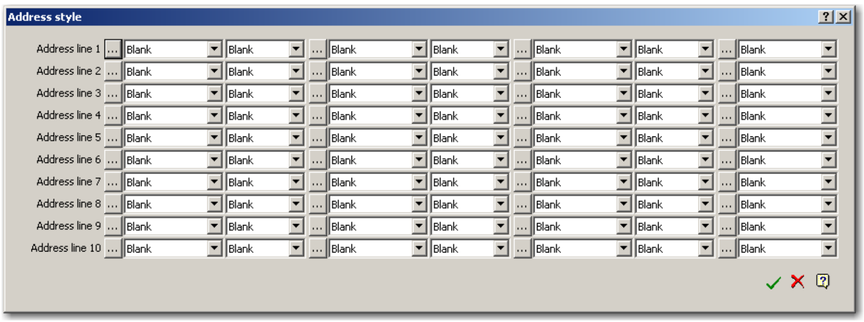


Fig. 7.19 Address Style Window

Insert Postal Address. Select this check box if you want the postal address to be included in the address style you are creating. Choose the appropriate radio button to define the condition under which to include the postal address.

Style Code. This is a unique system generated number for each new address style that is added.

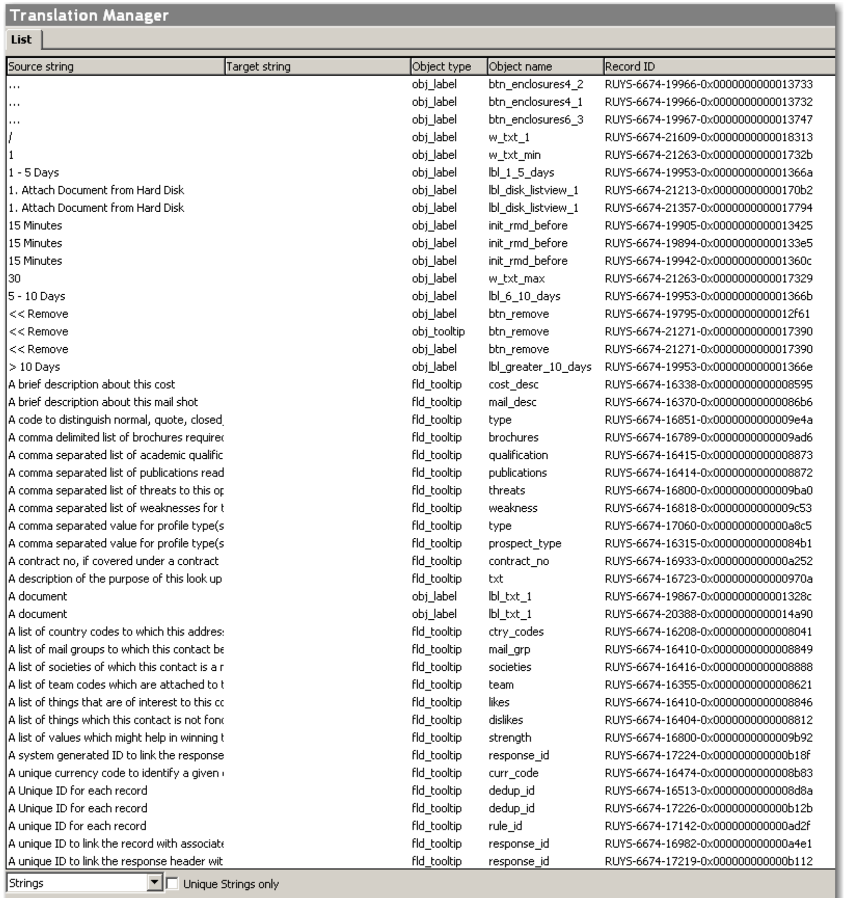
The address style you create is displayed in a preview frame.

Translation Manager

The Translation Manager helps in the translation of strings from one source language into more than one target language.

The Translation Manager browser displays the list of translatable strings and messages being used by QAD CRM. You can edit these strings and messages, export them to Excel files for translation, and import the translated strings back into the system through this screen.

Fig. 7.20 Translation Manager



Source string	Target string	Object type	Object name	Record ID
...		obj_label	btn_enclosures4_2	RUYS-6674-19966-0x0000000000013733
...		obj_label	btn_enclosures4_1	RUYS-6674-19966-0x0000000000013732
...		obj_label	btn_enclosures6_3	RUYS-6674-19967-0x0000000000013747
/		obj_label	w_txt_1	RUYS-6674-21609-0x0000000000018313
1		obj_label	w_txt_min	RUYS-6674-21263-0x000000000001732b
1 - 5 Days		obj_label	lbl_1_5_days	RUYS-6674-19953-0x000000000001366a
1. Attach Document from Hard Disk		obj_label	lbl_disk_listview_1	RUYS-6674-21213-0x00000000000170b2
1. Attach Document from Hard Disk		obj_label	lbl_disk_listview_1	RUYS-6674-21357-0x0000000000017794
15 Minutes		obj_label	init_rmd_before	RUYS-6674-19905-0x0000000000013425
15 Minutes		obj_label	init_rmd_before	RUYS-6674-19894-0x00000000000133e5
15 Minutes		obj_label	init_rmd_before	RUYS-6674-19942-0x000000000001360c
30		obj_label	w_txt_max	RUYS-6674-21263-0x0000000000017329
5 - 10 Days		obj_label	lbl_6_10_days	RUYS-6674-19953-0x000000000001366b
<< Remove		obj_label	btn_remove	RUYS-6674-19795-0x0000000000012f61
<< Remove		obj_tooltip	btn_remove	RUYS-6674-21271-0x0000000000017390
<< Remove		obj_label	btn_remove	RUYS-6674-21271-0x0000000000017390
> 10 Days		obj_label	lbl_greater_10_days	RUYS-6674-19953-0x000000000001366e
A brief description about this cost		fld_tooltip	cost_desc	RUYS-6674-16338-0x0000000000008595
A brief description about this mail shot		fld_tooltip	mail_desc	RUYS-6674-16370-0x00000000000086b6
A code to distinguish normal, quote, closed,		fld_tooltip	type	RUYS-6674-16851-0x0000000000009e4a
A comma delimited list of brochures requirec		fld_tooltip	brochures	RUYS-6674-16789-0x0000000000009ad6
A comma separated list of academic qualific		fld_tooltip	qualification	RUYS-6674-16415-0x0000000000008873
A comma separated list of publications read		fld_tooltip	publications	RUYS-6674-16414-0x0000000000008872
A comma separated list of threats to this op		fld_tooltip	threats	RUYS-6674-16800-0x0000000000009ba0
A comma separated list of weaknesses for t		fld_tooltip	weakness	RUYS-6674-16818-0x0000000000009c53
A comma separated value for profile type(s		fld_tooltip	type	RUYS-6674-17060-0x000000000000a8c5
A comma separated value for profile type(s		fld_tooltip	prospect_type	RUYS-6674-16315-0x00000000000084b1
A contract no, if covered under a contract		fld_tooltip	contract_no	RUYS-6674-16933-0x000000000000a252
A description of the purpose of this look up		fld_tooltip	txt	RUYS-6674-16723-0x000000000000970a
A document		obj_label	lbl_txt_1	RUYS-6674-19867-0x000000000001328c
A document		obj_label	lbl_txt_1	RUYS-6674-20388-0x0000000000014a90
A list of country codes to which this addres:		fld_tooltip	ctry_codes	RUYS-6674-16208-0x0000000000008041
A list of mail groups to which this contact be		fld_tooltip	mail_grp	RUYS-6674-16410-0x0000000000008849
A list of societies of which this contact is a r		fld_tooltip	societies	RUYS-6674-16416-0x0000000000008888
A list of team codes which are attached to t		fld_tooltip	team	RUYS-6674-16355-0x0000000000008621
A list of things that are of interest to this cc		fld_tooltip	likes	RUYS-6674-16410-0x0000000000008846
A list of things which this contact is not fonc		fld_tooltip	dislikes	RUYS-6674-16404-0x0000000000008812
A list of values which might help in winning t		fld_tooltip	strength	RUYS-6674-16800-0x0000000000009b92
A system generated ID to link the response		fld_tooltip	response_id	RUYS-6674-17224-0x000000000000b18f
A unique currency code to identify a given (		fld_tooltip	curr_code	RUYS-6674-16474-0x0000000000008b83
A Unique ID for each record		fld_tooltip	dedup_id	RUYS-6674-16513-0x0000000000008d8a
A Unique ID for each record		fld_tooltip	dedup_id	RUYS-6674-17226-0x000000000000b12b
A unique ID for each record		fld_tooltip	rule_id	RUYS-6674-17142-0x000000000000ad2f
A unique ID to link the record with associate		fld_tooltip	response_id	RUYS-6674-16982-0x000000000000a4e1
A unique ID to link the response header wit		fld_tooltip	response_id	RUYS-6674-17219-0x000000000000b112

The List tab includes a drop-down list at the bottom left where you can choose whether you want to view strings or messages. If you select the Unique Strings Only check box, the system displays only those strings that have a unique combination of Object Name and Source String fields. There is also a drop-down list in the toolbar that displays all the target languages in the system. You can choose to translate the source strings or messages to any of these languages. Select a record, right-click and choose Edit to modify the target string or message.

Note The system must have at least two languages set up for the Translation Manager to translate the messages or strings. If only a single language is available in the system, then the Translation Manager browser displays a blank screen. There is no second language to which the available messages or strings can be translated.

Export Data

The Export Data option of the Translation Manager lets you export source strings and messages for translation from the system to Microsoft Excel spreadsheets in predefined formats.

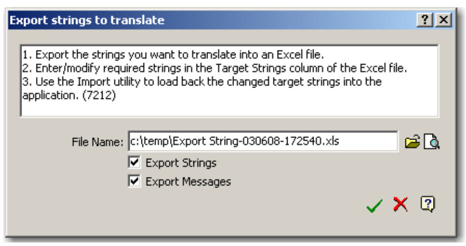


Fig. 7.21
Export Data

File Name. Click the folder icon to browse and choose a file and location where the exported source strings and messages are saved. If this is an existing file, you can view it by clicking on the document icon. In case a file already exists, the system confirms whether you want to overwrite the file.

Export Strings. Select this check box to export source strings.

Export Messages. Select this check box to export source messages.

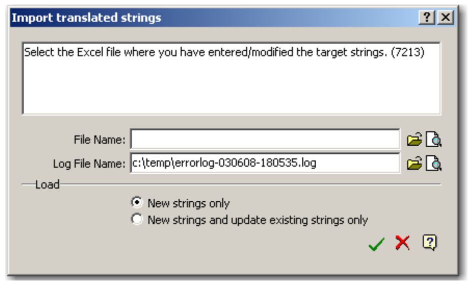
You can export strings and messages together or separately. If exported together, the first sheet of the Excel file contains the exported strings and the second sheet contains the exported messages.

The Excel sheet consists of the same columns as in the Translation Manager browser. All the columns of this Excel sheet are read-only except the Target Language column. The editable and read-only columns are displayed in different colors.

Import Data

The Import Data option of the Translation Manager lets you import the Microsoft Excel spreadsheets where you have entered or modified the target strings and messages.

Fig. 7.22
Import Data



File Name. Enter or choose the Excel file from which to import the translated target strings and messages into the system.

Log File Name. This field displays the location of the error log. The system automatically generates an error log after the import process is through. Click the folder icon to choose an alternate location.

New Strings Only. Select this radio button if you want to import only the new strings from the Excel file into the system. This option imports only those strings for which no target language has been specified.

New Strings and Update Existing Strings. Select this radio button if you want to import new strings as well as update the existing strings from the Excel file.

Pre Translation

The Pre Translation utility is used for simultaneously translating multiple strings that have the same values in their source and target strings.

Example `Edit` is the source string value and `Bewerken` is the target string value. If you choose to pre-translate, all the source strings having the value `Edit` and for which the target strings read `Bewerken` are translated at the same time. However, if two `Edit` source strings have two different target string values, then pre-translation does not work for those source strings.

Right-click in the Translation Manager browser and choose Pre Translation. A confirmation message pops up. Choose Yes to start pre-translation or No to cancel the process.

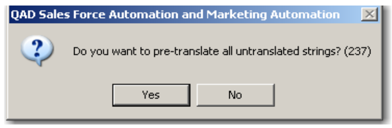


Fig. 7.23
Pre Translation

Note Pre Translation does not work with unique strings or messages. The Pre Translation option does not appear in the right-click menu if you select the Unique Strings Only check box.

Translation on Demand

The Translation on Demand option lets you view and modify all the labels and Tooltips for the current interface.

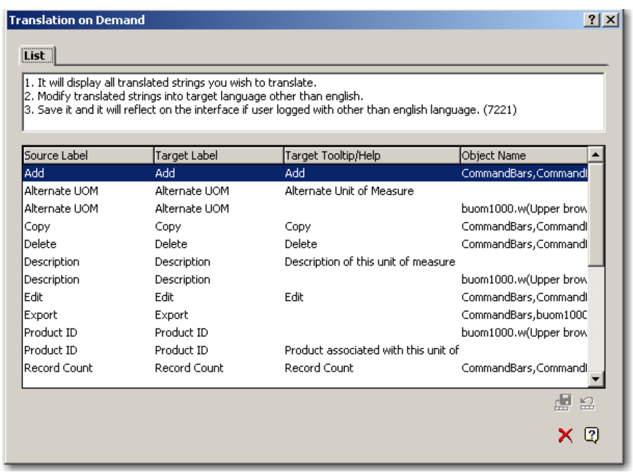


Fig. 7.24
Translation On Demand

In any browser, press Alt+F3 to display the Translation on Demand window. Right-click and choose Edit to modify target labels and Tooltips. Click Save to modify the record.

Note Modifying and saving a record through the Translation on Demand window does not make any global changes or replacements in the system. It only modifies the selected record.

If you are logged into the system using any language other than English, then the modifications you make through the Translation on Demand window get updated immediately.

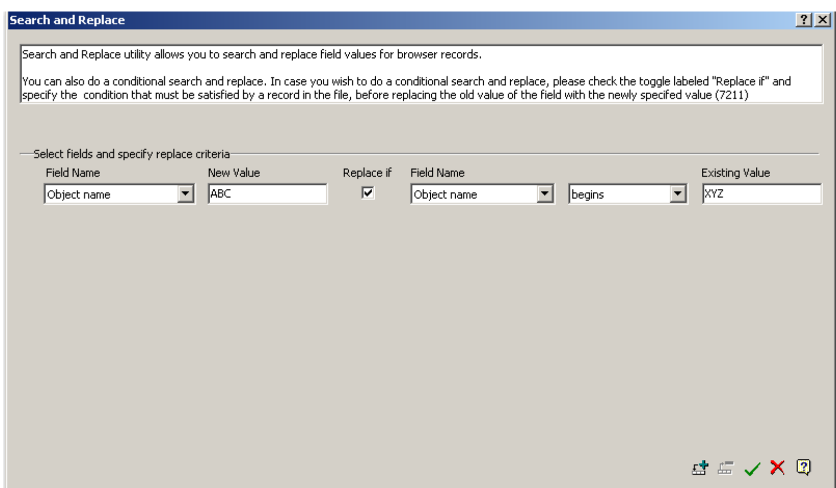
However, you cannot modify labels and Tooltips through the Translation on Demand option if the current login language is English. In this case when you click Save, a Target Language pop-up opens. Use the drop-down list to choose the target language for modification. The system does not let you change labels and Tooltips in English since that is the default language used by QAD CRM.

Fig. 7.25
Target Language

Replace

The Search and Replace utility allows you to search and replace field values for browser records within the Translation Manager. You can also perform a conditional search and replace.

Fig. 7.26
Search and Replace



Note Once you replace a term using the search and replace utility, you cannot undo the task. It is therefore advisable to ensure the validity of the search and replace task before using this utility.

System Control

The System Control option lets you define the settings of the following functions:

- Activity and Reminder Settings
- Configure Contact Detail Frame
- Define Base Currency
- Emailshot Preferences
- Report Options
- Business Year Settings
- Filter

Activity and Reminder Settings

The Activity Settings tab lets you apply color settings to differentiate between activity categories. System default settings use red to indicate overdue activities, blue for high-priority activities, and green to highlight recurring activities.

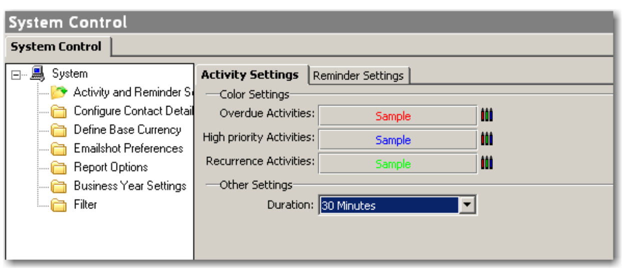
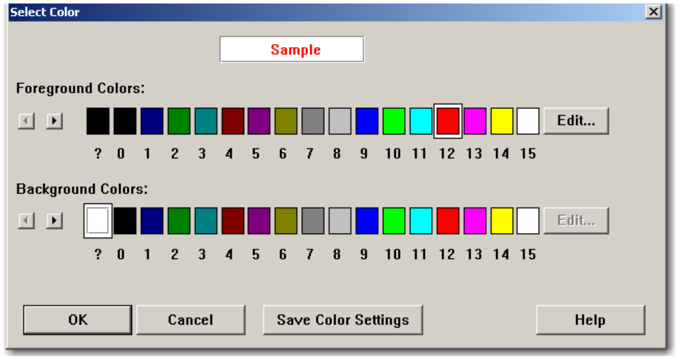


Fig. 7.27
Activity Settings

However, you can change these default settings by clicking on the Select Color icon. The Select Color window displays. Use it to define foreground and background colors for a selected activity category.

Fig. 7.28
Select Color



The Activity Settings tab also lets you specify a default duration for any new activity that you add. You can select an appropriate time interval from the Duration drop-down list.

Note The duration that you specify here as the default is used by the system when the end user creates a new Appointment type activity. The default duration that appears in the Appointment Details window is automatically taken from this field.

Use the Reminder Settings tab to enable reminders for activities.

Reminder. Select the Reminder check box to activate the reminder function for activities.

Remind Before. Select the time interval prior to the actual event when you want the reminder to be sent.

Note The time interval you select here is used by the system as the default for reminders. However, you can change this for individual activities when you create a new activity or modify an existing one.

Polling Interval. Select the default polling interval (“snooze time”) for reminders in the system.

Sound File. Select a sound file from your hard drive.

Email ID Type. Select the e-mail ID to which you want the reminder e-mail to be sent.

Email Content Type. Indicate whether you want to use a template to create the reminder e-mail.

Email Template. Select the template file for the reminder e-mail.

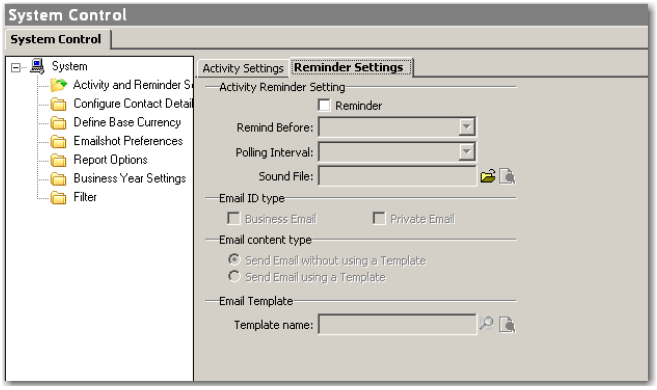


Fig. 7.29
Reminder Settings

Configure Contact Detail Frame

The Configure Contact Detail option lets you enable automatic generation of contact salutation and sign-off. Select the relevant check boxes to activate these features.

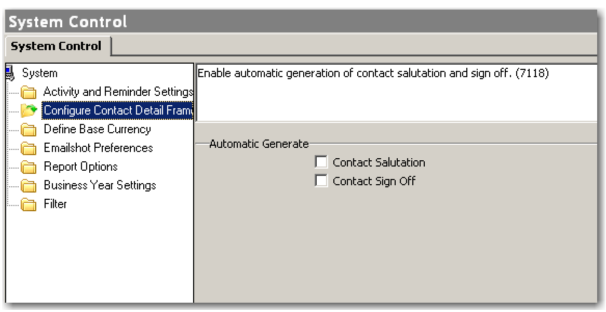
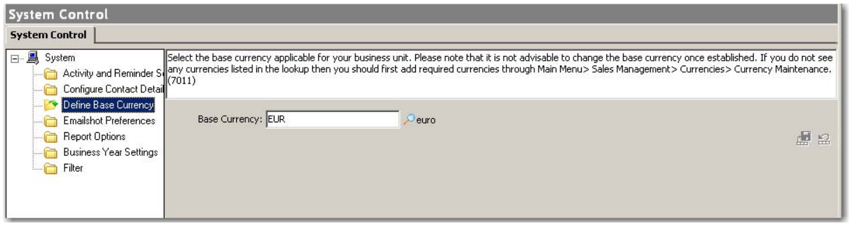


Fig. 7.30
Configure Contact Detail Frame

Define Base Currency

This option lets you define a base currency for a business unit. Use the lookup provided to select a currency.

Fig. 7.31
Define Base Currency



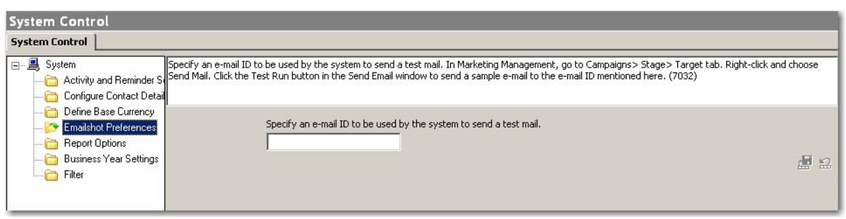
In case a required currency is not available in the lookup, go to Main Menu|Sales Management|Currencies|Currency Maintenance to add a new currency. For details, see *User Guide: QAD Customer Relationship Management*.

Note You should not change the base currency once it has been set up.

Emailshot Preferences

This option lets you specify a test e-mail account where you can receive sample system-generated e-mails. This e-mail account receives mails sent during the test run of emailshots created through the Campaigns module.

Fig. 7.32
Emailshot Preferences



Report Options

Use the Report Options to specify report-related settings for the Crystal reports supported by QAD CRM.

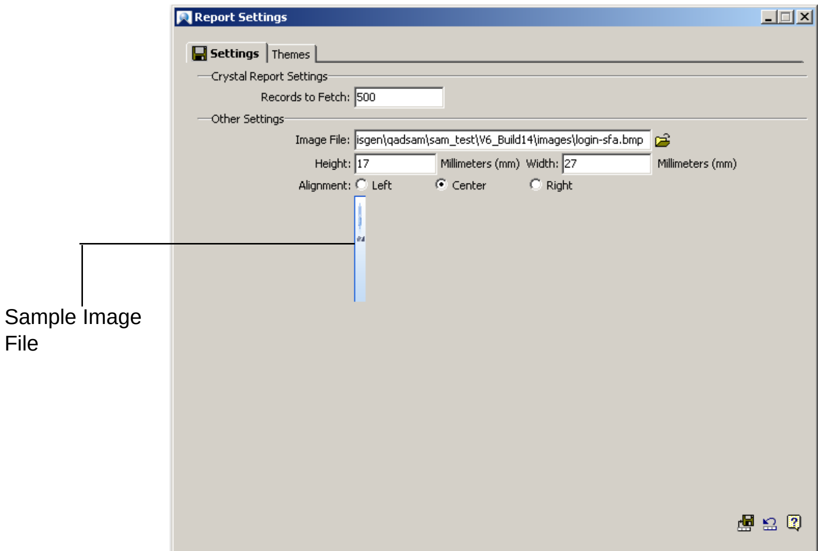


Fig. 7.33
Report Settings

Settings

Records to Fetch. Enter the number of records that you want displayed in each report screen.

Image File. Click on the folder icon to browse and select an image file. The image that you choose here is displayed by the QAD CRM report viewer for all standard and user-defined reports. The system displays a sample of the selected image file.

Height/Width. Specify the height and width (in millimeters) of the image display.

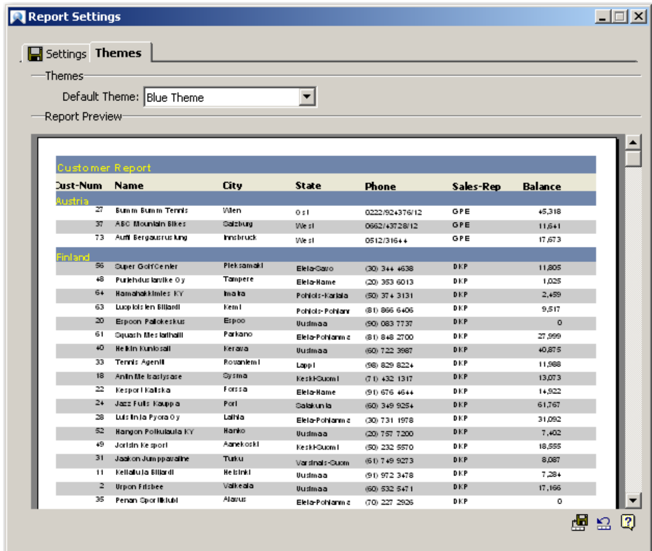
Alignment. Choose the alignment of the selected image by clicking the appropriate radio button.

Note The image feature is designed especially for situations where, for example, a company wants to display the company logo on all its reports.

Themes

Use the drop-down list to choose the default theme for your report display. You can see a preview of the chosen theme in the Report Preview area.

Fig. 7.34
Report Themes



Business Year Settings

Use this option to establish the business year settings for a business unit.

Month Starting Business Year. Select the starting month of the business year for the current business unit.

Start Year. Select the year marking the start of the business unit.

End Year. Select the last year through which the business unit is expected to function.

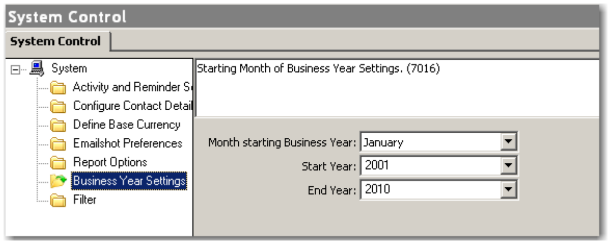


Fig. 7.35
Business Year Settings

Filter

The Filter option lets you view the list of filters defined in the system.

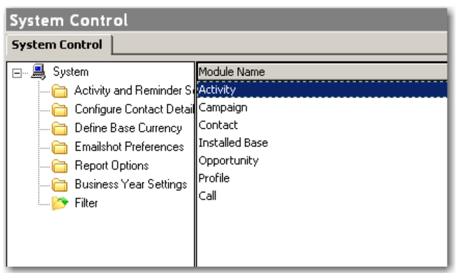


Fig. 7.36
Filter

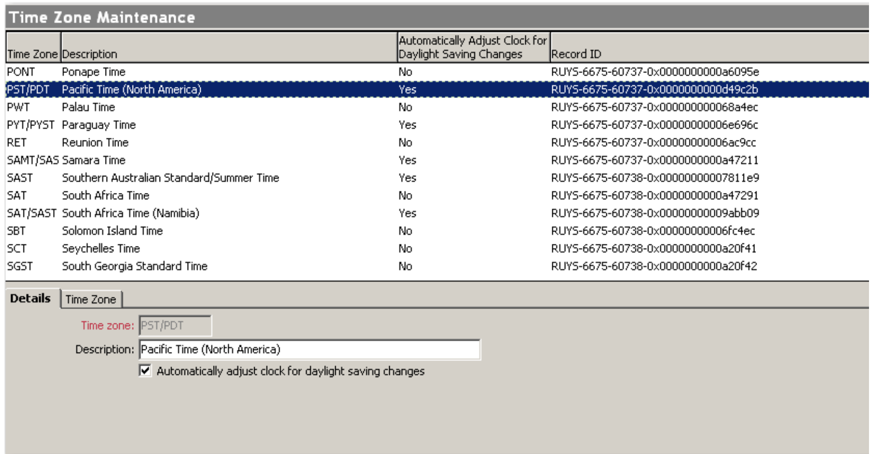
You can add, edit, and delete filters from here. Select a filter and double-click on it to view details. You can also right-click and choose View Filter to perform these functions.

Time Zone Maintenance

The Time Zone Maintenance option lets you manage records for all the time zones used by the system.

The Time Zone Maintenance browser displays the list of time zones available in the database. You can add, edit, copy, and delete time zones.

Fig. 7.37
Time Zone Maintenance



Details

Use the Details tab to record the name and description of the new time zone.

Time Zone. Enter the name of the new time zone you are adding.

Description. Enter a description for the new time zone.

Select the check box if you want the system to automatically adjust the clock for daylight saving changes.

Time Zone

Use the Time Zone tab to record basic information about the new time zone.

Time Period. Use the drop-down list to choose the time period you want to add.

Start Year, End Year. Enter the start and end years within which this new time period becomes effective. The end year is usually an arbitrary forecast date; for example, 9999.

GMT Offset. Enter the difference in hours from the Greenwich Mean Time.

Start Period. Enter the month and the expected date when the new time period begins.

Note Ensure that the date you choose falls in the same week for every year that the new time period remains effective. For example, if you choose the last Sunday in March as the start date for a particular time period, then your start period cannot be a date earlier than 25 March in any given year.

Weekday. Enter the day of the week from when the new time period is to start. Each day of the week is denoted by a number, with 1 representing Sunday, and 7 Saturday.

Time. Enter the hour when the new time period begins.

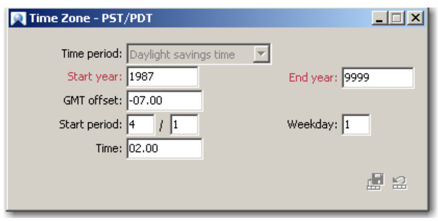


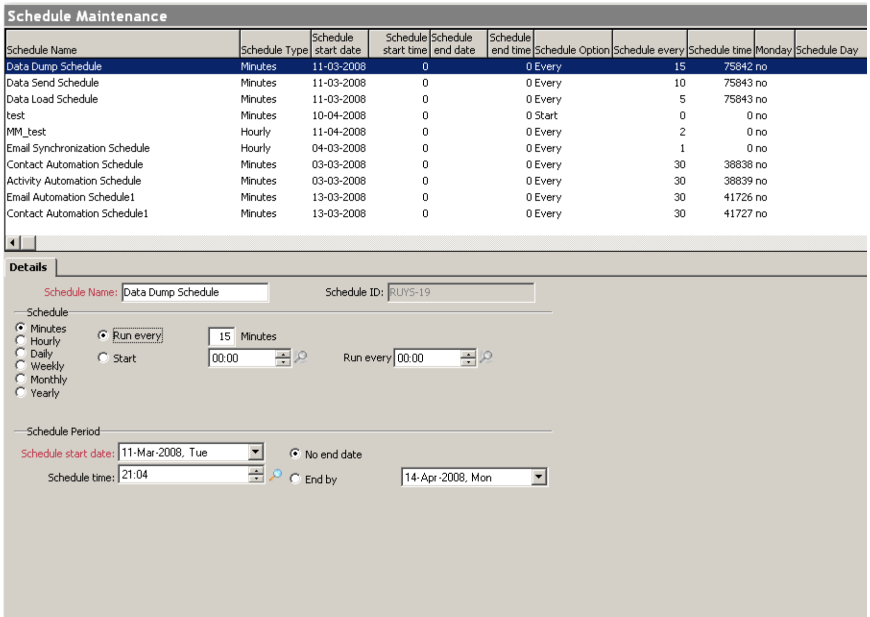
Fig. 7.38
Time Zone

Schedule Maintenance

You can use the Schedule Maintenance option to maintain all schedules defined in the system. Schedules can be attached to defined jobs created for AdminService, or used for replication in Activities.

The Schedule Maintenance browser displays the list of schedules available in the database. You can add, edit, copy, and delete schedules through this screen.

Fig. 7.39
Schedule Maintenance



Details

Use the Details tab to record basic information about a new schedule.

Schedule Name. Enter the name of the new schedule you are adding.

Schedule ID. This refers to a unique ID automatically generated by the system when you save the new schedule.

Schedule. Click the appropriate radio button to select a time line for the new schedule. Specify the schedule interval and pattern.

Schedule Start Date. Enter the start date of the new schedule.

No End Date/End By. Select the appropriate radio button to specify whether the schedule is effective indefinitely. If you choose End By, enter an end date.

Schedule Time. Enter the start time of the new schedule.

AppServer Service Maintenance

The AppServer Service Maintenance browser displays the list of application services available in the system. You can add, edit, copy, and delete application services.

To enable the AdminService utility to run on your system, you must first configure your application server (AppServer) settings in the QAD CRM system.

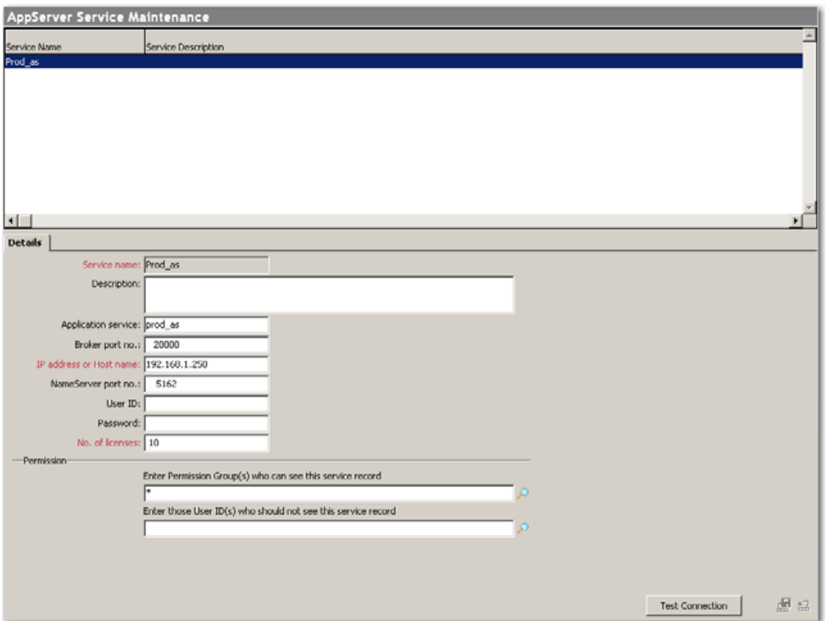


Fig. 7.40
AppServer Service Maintenance

Details

Use the Details tab to record basic information about a new service.

Service name. Enter the name of the new service you are adding.

Description. Enter a description for the new service.

Application service. Enter a name for the application service running on the AppServer.

Broker port no. Enter the port number of the broker.

IP Address or Host name. Enter the internet protocol address or the name of the host machine.

NameServer port no. Enter the port number of the NameServer.

User ID. Enter the unique code to connect to the AppServer.

Password. Enter a password that will enable connecting to the AppServer.

No. of licenses. Enter the number of licenses that will be issued for using the new service.

Permission. Use the look-up buttons to define permissions to the new service. You can grant access or deny permissions to specified user groups.

Click the Test Connection button to check whether the new service that you have set up works effectively. If it does, you can save the service record.

Chapter 8

Reports and Queries

This section describes how to create queries and run reports using the Reports and Queries module of the QAD Customer Relationship Management (QAD CRM) application. It discusses the following topics:

Overview

The Reports and Queries module provides you the flexibility to use reports provided with the QAD Customer Relationship Management (QAD CRM) system, or create your own custom reports using the Query Builder tool. The system also lets you choose varied output media for the reports. You can output the reports to external applications as well.

Reports

You can access the Reports module from Main Menu|Settings|Reports and Queries|Reports. Links to the Reports module are also available from Sales Management and Marketing Management menus.

The Reports screen displays the different categories of reports available. For more details on reports, see the Reports section of *User Guide: QAD Customer Relationship Management*.

Query Builder

The Query Builder helps you generate custom reports, and extract desired data in e-mails and document templates used for mail merges. Typically, database specialists or system administrators design queries to extract data that match specific conditions. Sales and marketing personnel, having limited knowledge of the system database, can then use these queries to generate custom reports according to their individual requirements. To access this option, go to Main Menu|Settings|Reports and Queries|Query Builder.

Building queries involves specifying conditions for extracting the desired data from the system database. For example, if you want to extract data for profiles that offer opportunities with at least 80% probability, you should join the tables of profiles and campaigns. Then you should specify the conditions for display by selecting the required fields. You can then use this query to generate a report or write a business letter that includes this data.

Note You should have a good understanding of the QAD CRM system database and its tables before attempting to create queries.

Query Builder Maintenance

Using the Query Builder, you can:

- Manage query records
- Build queries to extract data from the database

Right-click in the Query Builder browser to add a new query record. You can also edit or delete existing query records.

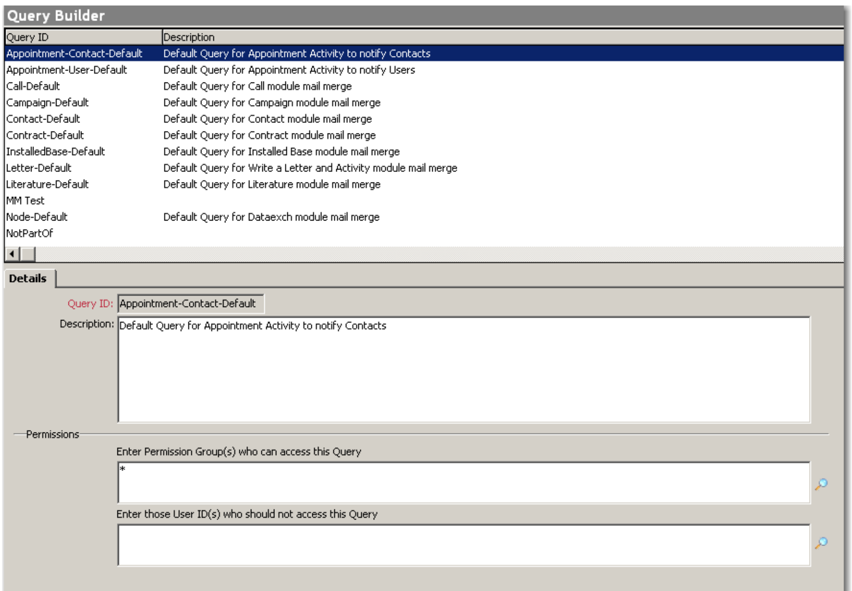


Fig. 8.1
Query Builder

Details

Query ID. Enter a query ID for the new record. This is a mandatory field.

Description. Enter an appropriate description for the new query record.

Permissions. Define access permissions to the new query record.

Save the record. This opens the Query Builder wizard.

Query Builder Wizard

The system provides the Query Builder wizard to assist you in designing queries. You can build a query when you save a new query record or while editing an existing query record.

To build a query from an existing record, select a query in the Query Builder browser. Right-click and choose Compose Query. The Query Builder wizard displays.

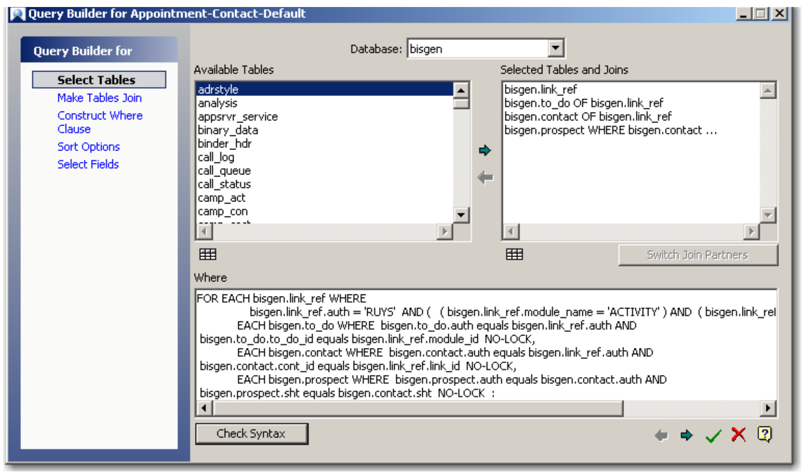


Fig. 8.2 Query Builder Wizard - Select Tables

Select Tables

This option lets you choose the tables that you want to use for defining a new query. It lists all the tables available for a chosen database.

Database. Select the appropriate database from the Database drop-down list.

Note QAD CRM uses three databases. The tables displayed depend on the database you choose.

Available Tables/Selected Tables and Joins. Select the appropriate tables from the Available Tables list. Use the arrow keys to move the selected tables to the Selected Tables and Joins list. You can view the field list of the selected tables by clicking the checkered button below each table.

Switch Join Partners . This button is enabled when the table you select can connect with more than one table. Clicking this button opens a dialog box that displays the possible options and lets you choose which related table you want to join.

Where . This text box describes how the selected tables function.

Check Syntax . Click this button to check the validity of your query.

Make Tables Join

You can use this option to join tables when you are defining complex queries.

Join. This drop-down list shows the joining conditions between the various tables you selected in the previous option Select Tables. Choose a condition; all the fields related to the selected tables display in the two list boxes.

Operator and And/Or. Click the appropriate button to specify the joining conditions between the fields of the two selected tables.

Inner Join/Outer Join. Select the appropriate radio button depending on the type of joining criteria you want to specify.

Note In Progress, Inner Join is a term used to specify that in a query combining two tables, the result returns records from the first table that meets the specified criteria, combined with the corresponding records from the second table that meets the specified criteria. The result does not include any records that have failed to meet any part of the criteria. Inner join is the default for all queries. However, Outer Join refers to the reverse. In this case the result includes only those records that have failed to meet any part of the criteria.

For example, using the SPORTS database, an inner join between customer and order does not include any customers that do not have any orders. In an outer join, the results are the reverse. An outer join between customer and order includes those customers that do not have any orders.

Join Criteria. This box displays the criteria you defined for joining fields from two selected tables. You can validate the syntax of the joining by clicking the Check Syntax button.

To join fields from two different tables, do the following:

1. Scroll through the left list and select a field by double-clicking it.
2. Click Operator or And/Or to apply a joining condition.
3. Scroll through the right list and select the second field from here by double-clicking it.

You can join as many tables as required for your query.

Construct Where Clause

Use this option only if you want to add some specific, hard-coded values to some of the fields you have selected for your query. Construct Where Clause is not a mandatory option.

Sort Options

Sort options let you sort data while executing a query.

Table. Select the table for which you want to define sort options.

Available Fields. Select the required fields from the Available Fields list.

Selected Fields. Use the arrow keys to move them to the Selected Fields list.

Click the appropriate radio button—ascending or descending—to sort the selected fields. You can select up to five fields for sorting.

Select Fields

This option lets you expose only selected fields in the custom report that is to be generated using the query you are building. For example, a table can have 100 fields, but you can set the number of fields that will be visible in the report to 20. Only those fields that you select here show up in the report writer when the actual report is being created.

Select the check box adjoining each field that you want to display in the report.

Save your settings in the Query Builder wizard for the new query record created. This record now displays in the Query Builder browser.

After creating a query, you can use it to generate custom or user-defined reports using the Report Writer.

Report Writer

You can generate various custom or user-defined reports through the Reports module using the Report Writer, also called the Add a Report wizard.

To open the Add a Report wizard, right-click the Reports screen and choose Add Report using QAD SFA/MA Report Writer. The Report Writer lets you design report formats and categorize them as required. These formats define the conditions, tables, and fields to use to extract data for browser reports using queries created through the Query Builder.

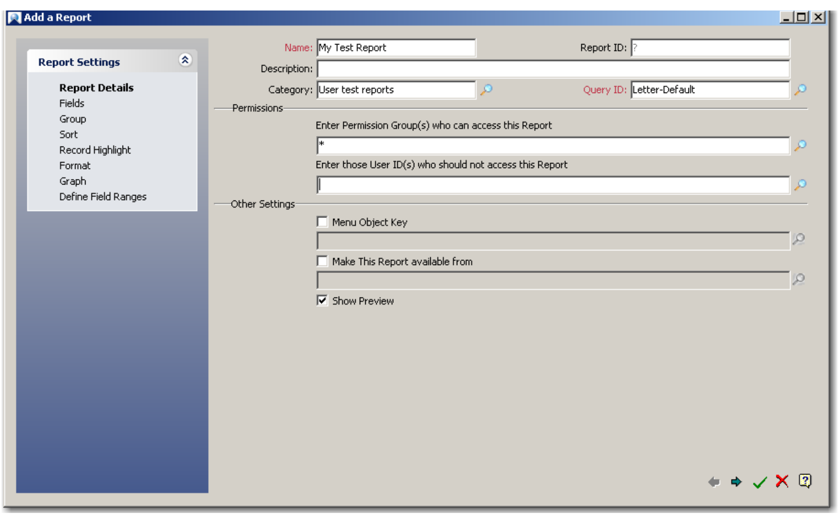


Fig. 8.3
Report Writer-Report Details

For more details on using the Report Writer, see *User Guide: QAD Customer Relationship Management*.

Chapter 9

Template Manager

This section describes how to design and apply templates to standard letters and e-mail messages in the QAD Customer Relationship Management (QAD CRM) application. It discusses the following topics:

Overview

A template is a pre-designed file containing prescribed formats, based on which you can create new files. A template ensures that all documents based on it have a consistent layout and format.

You can maintain templates for Microsoft Word documents and e-mail messages in QAD Customer Relationship Management (QAD CRM) through the Template Manager module. To access this module go to Main Menu|Settings|Template Manager.

Templates are useful for creating multiple documents or e-mail messages having similar content. Microsoft Word templates are used when creating documents using the mail merge facility or the Send Letter option. E-mail templates are used while sending e-mail messages to multiple contacts during a marketing campaign.

The system uses registered templates to automatically create various documents such as campaign catalogs, mailing labels, and business letters. In addition to pre-specified content, a template contains data extracted from specified fields of system tables. This is possible as templates are associated with database queries. Other fields, such as Microsoft Word fields, can also be included in templates.

Using the Template Manager module you can:

- Manage Microsoft Word templates.
- Manage e-mail message templates.
- Manage the location of templates and files used in mail-merge.

Standard Letters

Using the Standard Letters option, you can register and create Microsoft Word templates. You also specify their mail-merge type, which includes letter, label, or catalog. Templates must be associated with a pre-defined query. Once you register a template, you can design, view, edit, and delete it as required.

Microsoft Word templates are `.dot` files. You can create these files by designing the layout, format, styles, and default content of a Microsoft Word document, and saving it as a document template file in the desired location. To create a new document based on a template, double-click the template file from Windows Explorer.

Manage Document Templates

You can manage document template records from the Standard Letters option. Go to Main Menu|Settings|Template Manager|Standard Letters. Right-click in the browser area and choose to add, edit, copy, or delete a template record from the displayed list.

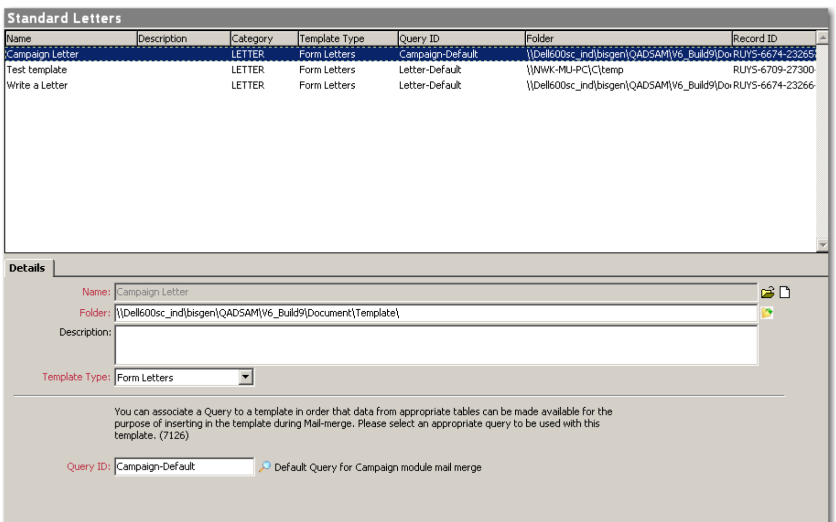


Fig. 9.1
Standard Letters

Details

Use the Details tab to record basic information for a new template.

Name. Enter a name for the new template record you are adding. Alternately, select an existing template file by clicking on the folder icon.

Folder. Enter a folder location where you want to save the new template. This location serves as the default location for this template. You can browse for the location by clicking on the folder icon.

Description. Enter a description for the template you are creating. You could include the purpose and function of the template in this field.

Template Type. Select the template type from the drop-down list. Template type refers to the kind of document for which you want to create a template. Options include Form Letters, Mailing Labels, and Catalog.

Query ID. Use the look-up to select the appropriate query that you want to attach to your template.

Note All fields except Description are mandatory.

Save the template record. It displays in the Standard Letters browser as a registered template. You can now design a template for this new record you created.

Design or Edit Templates

To design a template, do the following:

1. Select a template record from the list of registered templates in the Standard Letters browser.
2. With a selected template record, do one of the following:
   - Click the Design Template button on the toolbar.
   - Right-click anywhere in the list of templates and choose Design Template.
   - Select Design Template from the File menu on the menu bar.
3. Design a new template according to your requirements, or edit an existing template.
4. Save and close the template.

New Template

If there is no template associated with a template entry, the system opens Microsoft Word and creates a blank template. The name and location where the system saves the blank template is specified in the template entry.

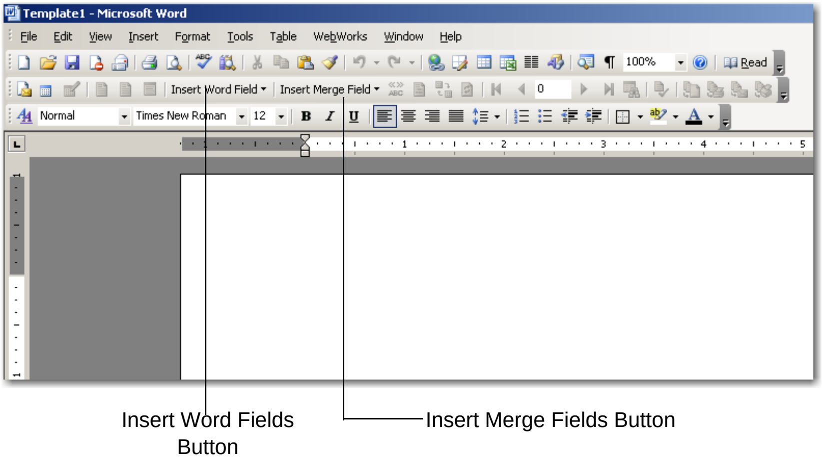


Fig. 9.2
Design New Template

Though you can design a new template directly from Microsoft Word, it is recommended that you do this from within the QAD CRM system. When you design a template through the system, the template includes the Insert Merge Fields and the Insert Word Fields buttons to insert custom results of associated queries and Microsoft Word fields, which are otherwise not available. The query fields available depends on the query you specify while adding the template entry.

Existing Template

If an existing template is already associated with a template entry, the system prompts you to confirm. If you choose to redesign the template, the system deletes all content in the template and opens it for editing.

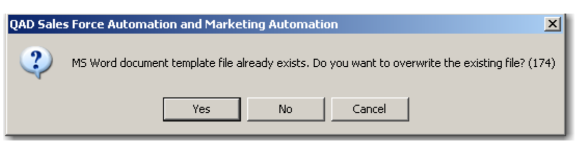


Fig. 9.3
System Message-Existing Template

Note Opening an existing template in redesign mode removes the previous content. QAD recommends that you open an existing template in edit mode instead.

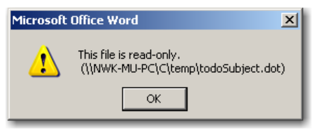
View Templates

To view a template, select a template record from the list of registered templates in the Standard Letters browser and do one of the following:

- Click the View Template button on the toolbar.
- Right-click and choose View Template.
- Select View Template from the File menu on the menu bar.

The system opens the template in Microsoft Word as a read-only file. You cannot save any changes made to the template.

Fig. 9.4
System Message-View Template



Emails

Using the Emails option, you can create and save templates for e-mail messages. These templates contain pre-defined content and data from specified fields, and are useful in composing e-mail messages that are to be sent to multiple contacts. They are especially suitable for sending out emailshots through the Campaign module, where e-mail messages regarding a campaign are sent to a filtered target audience.

You can manage e-mail template records from the Emails option. Go to Main Menu|Settings|Template Manager|Emails. Right-click in the browser area and choose to add, edit, copy or delete a template record from the list displayed.

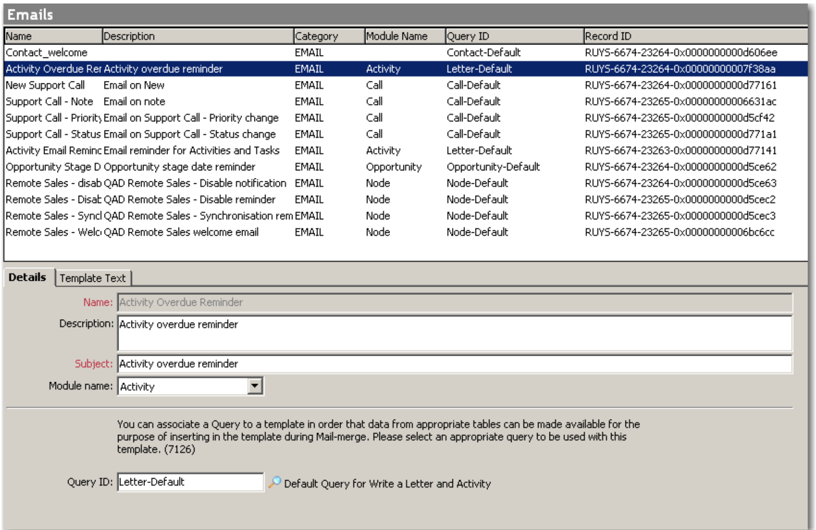


Fig. 9.5
Emails-Details tab

Details

Use the Details tab to record basic information for a new template.

Name. Enter a name for the new template record you are adding. This is a mandatory field.

Description. Enter a description for the template you are creating. You could include the purpose and function of the template in this field.

Subject. Enter the subject line for the e-mail template. This subject line is used for all e-mails that are sent out using this template record. This is a mandatory field.

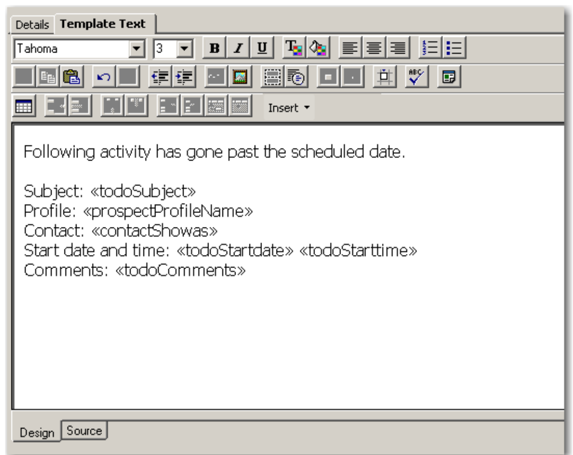
Module Name. Select the module name from the drop-down list. The template record you create is visible through the Use Template option of the Compose Email screen only from the module you indicate here. If you leave this field blank, the e-mail template record is available across all modules.

Query ID. Use the look-up to select the appropriate query that you want to attach with your template.

Template Text

Use the Template Text tab to design a template for the selected e-mail template record. This tab contains an editing toolbar similar to that of Microsoft Word. You can design the format, layout, style, and other components using this toolbar. You can select system features that you want to include in the template through the Insert button.

Fig. 9.6
Emails-Template Text tab



Save the template record. It displays in the Emails browser as a registered e-mail template.

Note You can create text-only templates for e-mails using the Template Text tab. When you compose e-mails using the Send an Email option, you can choose whether you want the template displayed as simple text or in HTML format.

Standard Letter Folder Locations

Using the Standard Letter Folder Locations option of the Template Manager, you can specify default folders for storing templates, and documents based on those templates. When you save a template, it is useful to save it in a default folder prescribed for particular user types or user groups.

Since the templates listed under Standard Letters can used by multiple users, consider storing them in a central location on the network. Storing all the templates on a shared network drive provides direct access to multiple system users.

You can manage document template locations from the Standard Letter Folder Locations option. Go to Main Menu|Settings|Template Manager|Standard Letter Folder Locations. Right-click in the browser area and choose to add, edit, copy, or delete a template location from the list displayed.

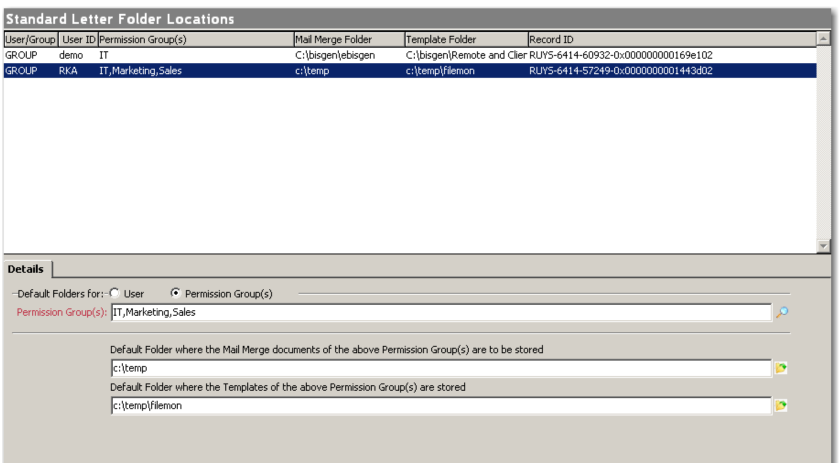


Fig. 9.7
Standard Letter Folder Locations

Details

Use the Details tab to record permissions and default folder locations for a new template.

User/Permission Groups. Select the appropriate radio button. To make a template available to an individual user, select User. To make a template available to a user group, select Permission Groups.

User ID/Permission Groups. Use the lookup to enter names of those users or user groups who will have permission to access the indicated templates and mail merge folders on a shared drive.

Default Folder for storing Mail Merge documents/Templates for above

Permission Groups. Click the folder icon next to these fields to browse and select the default location for storing mail merge documents and templates for selected users or user groups.

Click Save to save the default folder locations.

Chapter 10

QAD AdminService

This section describes the settings required to run the QAD AdminService (QAD ADS). The QAD ADS is an essential component for the smooth functioning of the QAD Customer Relationship Management (QAD CRM) application. It discusses the following topics:

Overview

QAD ADS is a Windows service that manages and simultaneously executes background jobs that are defined in the QAD CRM system:

- Synchronizes QAD ADS settings with those of QAD CRM
- Monitors defined jobs
- Schedules and executes predefined jobs, and performs post-job processing

Understanding Jobs

A job can be a single task or a series of tasks that are defined in the QAD CRM system. QAD ADS implements multiple job instances simultaneously. It processes two types of jobs:

- Predefined jobs in QAD ADS
- Jobs defined in the QAD CRM system

Jobs are linked to QAD ADS through instances. QAD ADS can work with multiple instances or environments, such as Production, Test, Training, and so on. Each instance on QAD ADS can have a separate database and a separate set of jobs to be executed.

Predefined Jobs

QAD ADS contains the following predefined jobs:

- DataSyncJob: Perform data synchronization activities
- DeleteLog: Delete job history and event log records
- SendEmail: Send and receive e-mails on behalf of QAD CRM

The QAD ADS service executes predefined jobs at defined intervals. For more details, see “Managing Predefined Jobs”.

Defined Jobs

Job definitions in QAD CRM are stored in a database table called job. The job table can have one or more tasks. A schedule can be attached to either a job or a task, as specified in the QAD CRM system.

Defined jobs for QAD ADS includes:

- Exchange Server Automation
- Email Reminder
- Activity Overdue Reminder
- Opportunity Stage Date Reminder

For more details, see “Managing Defined Jobs”.

Configuring AppServer Settings

To enable the QAD ADS service to run on your system, you must first configure your application server (AppServer) settings in the QAD CRM system. To define these settings, go to Main Menu|Settings|System|AppServer Service Maintenance. For details, see AppServer Service Maintenance.

Setting Up QAD ADS

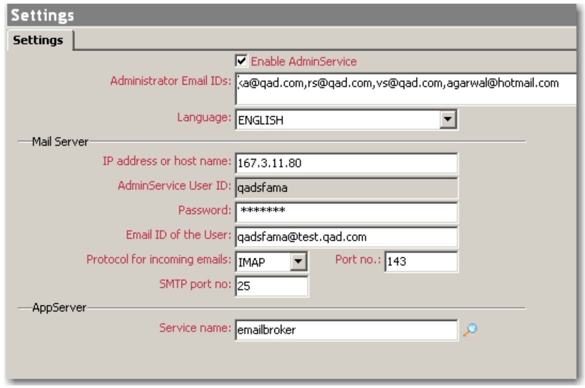
Two types of settings are required to run QAD ADS:

- Settings defined in the QAD CRM system through the AdminService Settings screen (see “Configuring AdminService Settings”)
- Settings defined in the QAD ADS Windows service and stored in the registry (see “Configuring the QAD ADS” on page 133)

Configuring AdminService Settings

After defining the settings in the AppServer Service Maintenance screen, you must set up the AdminService Settings screen in the QAD CRM system. To configure these settings, go to Main Menu|Settings|System|AdminService|Settings. The Settings screen displays.

Fig. 10.1
Settings Screen



Settings

Enable AdminService. Select this check box to enable the other fields in this screen.

Administrator Email IDs. Enter the e-mail IDs of the system administrators. Multiple e-mail IDs can be separated by commas or semi-colons.

Language. Choose the language you want to use for this service.

IP Address or Host name. Enter the IP address or host name of the mail server you want to use.

AdminService User ID. Enter Windows user ID for AdminService.

Note This field is currently non-editable, and the default user ID is set to qadsfama.

Password. Enter the password for the AdminService user ID.

Email ID of the User. Enter the e-mail ID of the AdminService user.

Protocol for incoming emails. Choose the protocol (IMAP or POP3) for incoming e-mails from the drop-down.

Port no. Enter the incoming mail server port number according to the protocol selected.

SMTP port no. Enter the SMTP port number for outgoing mails.

Service name. Enter the service name of the AppServer to which you want QAD ADS to connect.

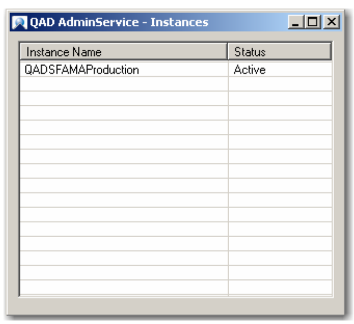
Save the settings you have recorded for the AdminService Settings. You can now start the QAD ADS service.

Configuring the QAD ADS

To configure the QAD ADS Windows service:

1. Start the QAD ADS through Start|Programs|QAD AdminService 6.00|Settings. This creates a shortcut icon in the system tray of your machine.
2. Double-click the icon in the system tray or right-click it and choose Settings. The Instances window displays showing the available instances, and their current status on QAD ADS.

Fig. 10.2
Instances Window

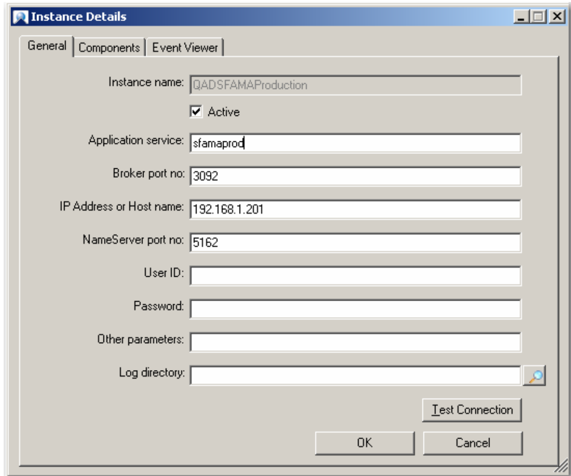


3. Right-click and choose Add to add a new instance.

   Note Similar options are available for Edit, Copy, and Delete.

   The Instance Details screen displays.

Fig. 10.3
Instance Details-General



4 Enter the instance name and other details in the General tab of the Instance Details screen. Select the Active check box to activate the new instance.

Important For a given application service, apart from the Instance Name and Other Parameters fields, all other field values must match those entered in the AppServer Service Maintenance screen of QAD CRM (see Configuring AppServer Settings).

5 Click Test Connection to verify that the AppServer connection is established and running successfully.

6 Click OK to save the new instance or Cancel to return to the Instances window. When you save a new instance, QAD ADS sends a message confirming the creation of a new instance and provides an option to restart the QAD ADS service.

7 Exit QAD ADS and restart the service on your machine. This ensures that all of the latest settings are picked up by QAD ADS while running the instance.

Modifying QAD ADS Settings

You can modify the service settings by using the AdminService Settings screen in QAD CRM (see Configuring AdminService Settings). After making any changes to the field values here, restart QAD ADS to automatically pick up the new settings.

Note It is recommended that you do not change the service settings using the Edit option in the Instances window. Settings defined in the AdminService Settings screen override any changes you make in the service directly.

Exiting QAD ADS

To exit the QAD ADS service, do one of the following:

- Click the Close (X) button on the top right corner of the QAD ADS Instances window.
- Right-click the system tray icon for QAD ADS and choose Exit.

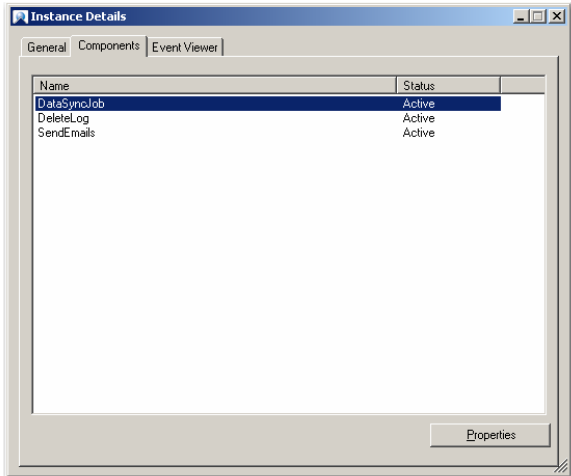
Note Closing the QAD ADS service does not stop it. It keeps running in the background.

Managing Predefined Jobs

Predefined jobs display on the Components tab of the Instance Details screen. The three predefined jobs that QAD ADS performs for any selected instance include:

- DataSyncJob: assists in data synchronization with QAD CRM.
- DeleteLog: deletes job history and event log records that are older than a specified number of days.
- SendEmails: helps deliver e-mails forwarded by QAD CRM.

Fig. 10.4
Instance Details-Components



You can activate the predefined jobs, and edit the properties associated with them by using the Properties window. To do so, select the job and click Properties.

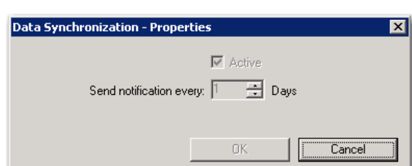
DataSyncJob

DataSyncJob executes the following tasks:

- Disables remote nodes for which no valid QAD CRM user can be located
- Sends e-mail reminders to inactive nodes
- Disables child nodes that have not synchronized data in a given span of time

Note DataSyncJob works only if data synchronization is activated in the QAD CRM system, and its corresponding component is enabled in QAD ADS. The notification frequency of the DataSyncJob is not editable. Its value is preset to once a day. The Properties window for this job is view-only.

Fig. 10.5
DataSyncJob-Properties



DeleteLog

DeleteLog deletes job history and event log records. You can specify the frequency of these tasks by clicking Properties. The following window displays.

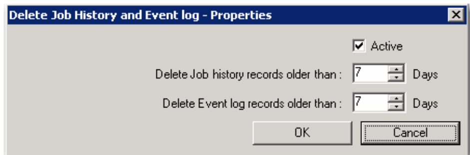


Fig. 10.6 DeleteLog-Properties

Select the number of days after which you want QAD ADS to delete the job history and event log records.

SendEmail

SendEmail executes the following tasks:

- Sends e-mails forwarded by QAD CRM
- Alerts system administrators through e-mail if database connections fail
- Sends e-mail activity report after a predefined interval, listing the number of e-mails that were sent or not sent through QAD ADS

You can specify the frequency of these tasks by clicking Properties. The following window displays.

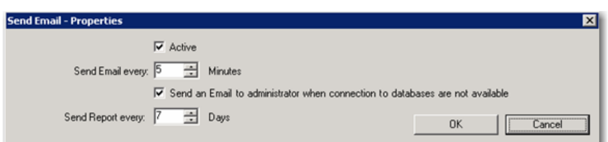


Fig. 10.7 Send Email-Properties

Select the frequency with which to send e-mails and forward reports to the system administrators. Select the appropriate check box to alert system administrators if connections to databases are not available.

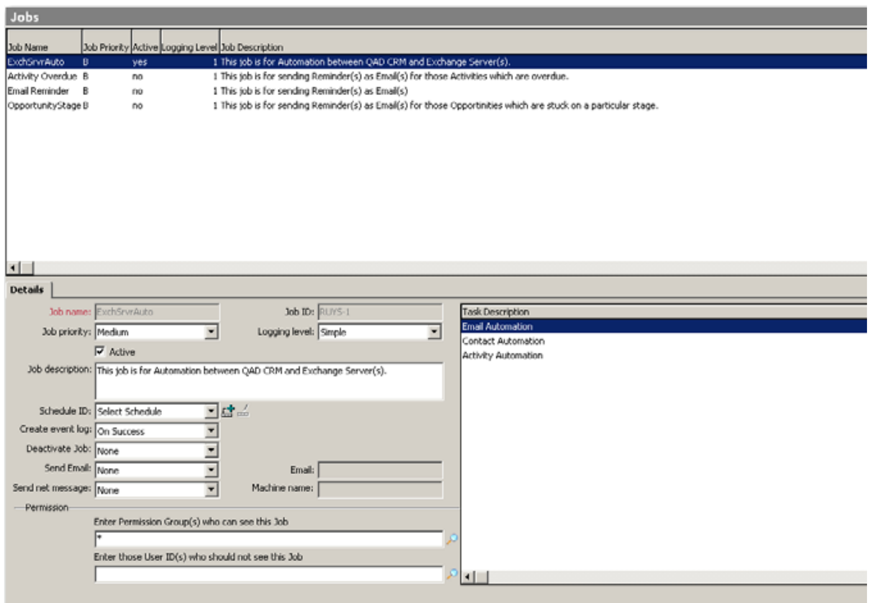
Note Only those system administrators are alerted whose e-mail IDs are specified in AdminService Settings screen.

Managing Defined Jobs

Use the Jobs screen in QAD CRM to view defined jobs for QAD ADS. To access the Jobs screen, go to Main Menu|Settings|System|AdminService|Jobs.

The Jobs screen is divided into two parts—the top half is a browser displaying the list of defined jobs available, while the bottom half opens the selected job in edit mode.

Fig. 10.8
Jobs



To edit a job, select a job and then do one of the following:

- Click the Edit button on the toolbar.
- Right-click and choose Edit.
- Choose Edit from the File menu.

Note Similar options are available for Add and Delete.

When you right-click and choose Add, the system displays the types of defined jobs available. After you add a new job, it displays as a new record in the browser.

You can only choose the defined job type that you want to add. All field values and tasks associated with a defined job are preset in the system. However, you can edit the fields or the task settings according to your requirements.

Tasks can only be edited by right-clicking in the Task Description area and choosing Edit. This displays the Edit Task window where you can edit task settings. Depending on the task type you select, the appropriate Edit Task window displays.

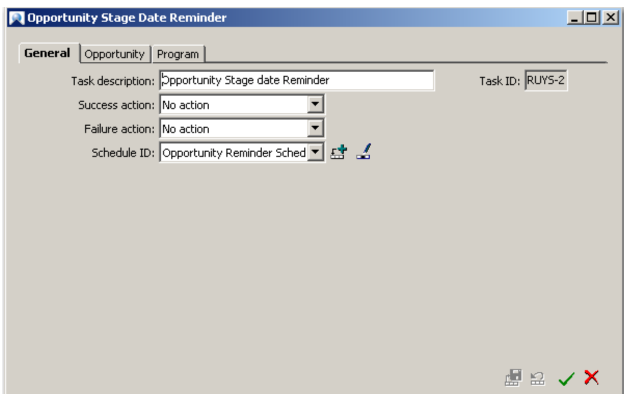


Fig. 10.9 Edit Task-Opportunity Stage Date Reminder

Note You cannot add or delete a task.

Managing Schedules

You can also attach a schedule to a defined job by using the Schedule ID drop-down either in the Jobs screen, or in the Edit Task window.

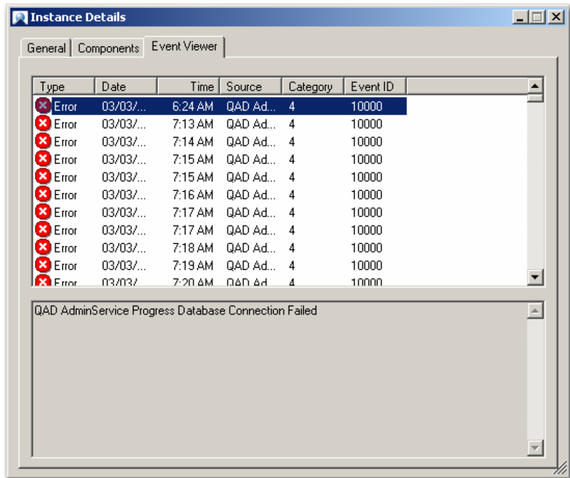
Note You can attach schedules only at one level—job or task—at a time. It is recommended that you attach schedules at the job level rather than at the task level. When you attach a schedule at the job level, the related tasks get sequenced automatically.

For more details on schedules, see Schedule Maintenance.

Using the Event Viewer

Use the Event Viewer to view the event log for defined jobs related to a selected instance. To access the log, click the Event Viewer tab of the Instance Details screen on QAD ADS.

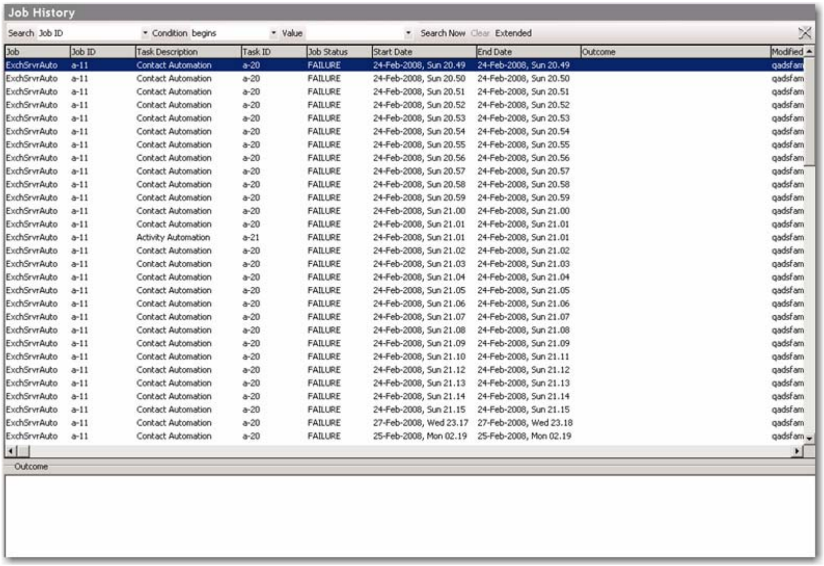
Fig. 10.10
Event Viewer



Choose the type of events you want to display here through the Create Event Log field of the Jobs screen in QAD CRM. The viewer currently displays Error and Information type events. To refresh data in the event viewer, right-click and choose Refresh.

Viewing Job History

Use the Job History screen to view the job history records in QAD CRM. Go to Main Menu|Settings|System|AdminService|Job History.



Job History

Search Job ID Condition begins Value Search Now Clear Extended

Job	Job ID	Task Description	Task ID	Job Status	Start Date	End Date	Outcome	Modified
ExchSrvrAuto	a-11	Contact Automation	a-20	FAILURE	24-Feb-2008, Sun 20.49	24-Feb-2008, Sun 20.49		qadsfam
ExchSrvrAuto	a-11	Contact Automation	a-20	FAILURE	24-Feb-2008, Sun 20.50	24-Feb-2008, Sun 20.50		qadsfam
ExchSrvrAuto	a-11	Contact Automation	a-20	FAILURE	24-Feb-2008, Sun 20.51	24-Feb-2008, Sun 20.51		qadsfam
ExchSrvrAuto	a-11	Contact Automation	a-20	FAILURE	24-Feb-2008, Sun 20.52	24-Feb-2008, Sun 20.52		qadsfam
ExchSrvrAuto	a-11	Contact Automation	a-20	FAILURE	24-Feb-2008, Sun 20.53	24-Feb-2008, Sun 20.53		qadsfam
ExchSrvrAuto	a-11	Contact Automation	a-20	FAILURE	24-Feb-2008, Sun 20.54	24-Feb-2008, Sun 20.54		qadsfam
ExchSrvrAuto	a-11	Contact Automation	a-20	FAILURE	24-Feb-2008, Sun 20.55	24-Feb-2008, Sun 20.55		qadsfam
ExchSrvrAuto	a-11	Contact Automation	a-20	FAILURE	24-Feb-2008, Sun 20.56	24-Feb-2008, Sun 20.56		qadsfam
ExchSrvrAuto	a-11	Contact Automation	a-20	FAILURE	24-Feb-2008, Sun 20.57	24-Feb-2008, Sun 20.57		qadsfam
ExchSrvrAuto	a-11	Contact Automation	a-20	FAILURE	24-Feb-2008, Sun 20.58	24-Feb-2008, Sun 20.58		qadsfam
ExchSrvrAuto	a-11	Contact Automation	a-20	FAILURE	24-Feb-2008, Sun 20.59	24-Feb-2008, Sun 20.59		qadsfam
ExchSrvrAuto	a-11	Contact Automation	a-20	FAILURE	24-Feb-2008, Sun 21.00	24-Feb-2008, Sun 21.00		qadsfam
ExchSrvrAuto	a-11	Contact Automation	a-20	FAILURE	24-Feb-2008, Sun 21.01	24-Feb-2008, Sun 21.01		qadsfam
ExchSrvrAuto	a-11	Activity Automation	a-21	FAILURE	24-Feb-2008, Sun 21.01	24-Feb-2008, Sun 21.01		qadsfam
ExchSrvrAuto	a-11	Contact Automation	a-20	FAILURE	24-Feb-2008, Sun 21.02	24-Feb-2008, Sun 21.02		qadsfam
ExchSrvrAuto	a-11	Contact Automation	a-20	FAILURE	24-Feb-2008, Sun 21.03	24-Feb-2008, Sun 21.03		qadsfam
ExchSrvrAuto	a-11	Contact Automation	a-20	FAILURE	24-Feb-2008, Sun 21.04	24-Feb-2008, Sun 21.04		qadsfam
ExchSrvrAuto	a-11	Contact Automation	a-20	FAILURE	24-Feb-2008, Sun 21.05	24-Feb-2008, Sun 21.05		qadsfam
ExchSrvrAuto	a-11	Contact Automation	a-20	FAILURE	24-Feb-2008, Sun 21.06	24-Feb-2008, Sun 21.06		qadsfam
ExchSrvrAuto	a-11	Contact Automation	a-20	FAILURE	24-Feb-2008, Sun 21.07	24-Feb-2008, Sun 21.07		qadsfam
ExchSrvrAuto	a-11	Contact Automation	a-20	FAILURE	24-Feb-2008, Sun 21.08	24-Feb-2008, Sun 21.08		qadsfam
ExchSrvrAuto	a-11	Contact Automation	a-20	FAILURE	24-Feb-2008, Sun 21.09	24-Feb-2008, Sun 21.09		qadsfam
ExchSrvrAuto	a-11	Contact Automation	a-20	FAILURE	24-Feb-2008, Sun 21.10	24-Feb-2008, Sun 21.11		qadsfam
ExchSrvrAuto	a-11	Contact Automation	a-20	FAILURE	24-Feb-2008, Sun 21.12	24-Feb-2008, Sun 21.12		qadsfam
ExchSrvrAuto	a-11	Contact Automation	a-20	FAILURE	24-Feb-2008, Sun 21.13	24-Feb-2008, Sun 21.13		qadsfam
ExchSrvrAuto	a-11	Contact Automation	a-20	FAILURE	24-Feb-2008, Sun 21.14	24-Feb-2008, Sun 21.14		qadsfam
ExchSrvrAuto	a-11	Contact Automation	a-20	FAILURE	24-Feb-2008, Sun 21.15	24-Feb-2008, Sun 21.15		qadsfam
ExchSrvrAuto	a-11	Contact Automation	a-20	FAILURE	27-Feb-2008, Wed 23.17	27-Feb-2008, Wed 23.18		qadsfam
ExchSrvrAuto	a-11	Contact Automation	a-20	FAILURE	25-Feb-2008, Mon 02.19	25-Feb-2008, Mon 02.19		qadsfam

Outcome

Fig. 10.11
Job History

The records displayed depend on the settings specified in the “DeleteLog” job in QAD ADS.

Section 2

Integration

This section describes how to integrate the QAD Customer Relationship Management (QAD CRM) system with other third-party applications.

Chapter 11

QAD ERP Integration

This section describes how to configure the settings to activate integration of the QAD Customer Relationship Management (QAD CRM) application with the QAD ERP application. It discusses the following topics:

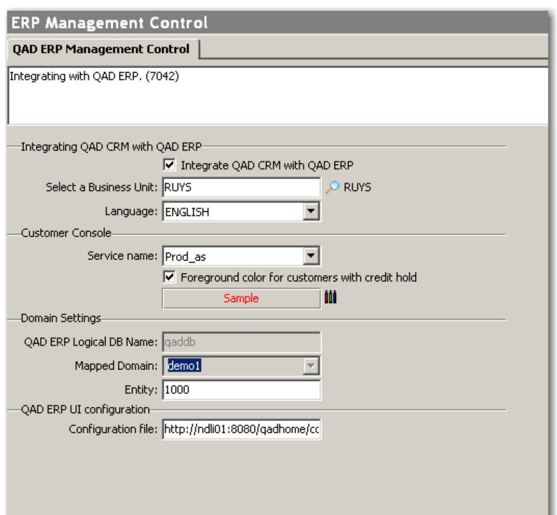
Overview

The QAD ERP Integration module helps to maintain settings and set switches for the integration of QAD CRM and QAD ERP. You can set up the integration for particular modules based on your requirements. You can access the QAD ERP Integration module through the main menu of QAD CRM.

Integration Setup

To activate integration with QAD ERP and maintain domain settings, go to Main Menu|QAD ERP Integration|ERP Management Control.

Fig. 11.1
ERP Management Control



QAD ERP Management Control

Use the QAD ERP Management Control option to configure settings that control the integration of QAD CRM and QAD ERP.

Integrate QAD CRM with QAD ERP. Select this check box to activate the integration of the two applications.

Select a Business Unit. Use the drop-down list to select a business unit. The records pertaining to the selected business unit will participate in the integration with QAD ERP.

Language. Select a language from the drop-down list. The language you select here is used in other integration programs. For example, initial data transfer uses this field to find translated text and export it to the log file.

Service Name. Select a service name for Customer Console.

Note In case QAD ERP databases are not connected in the current QAD CRM session, the settings defined for this service name in Main Menu|Settings|System|AppServer Service Maintenance are used to connect to the required QAD ERP databases.

Foreground color for customers with credit hold. Select this check box if you want the foreground color to show up as defined in the color scheme here. Choose a different foreground color by clicking on the color button.

Note If a customer is on credit hold, then this foreground color will be used to distinguish that customer from the other customers who do not have any credit hold. The customers with credit hold will show up in the chosen color in browsers like All Profiles and the Customer Console.

QAD ERP Logical DB Name. Enter the logical name for the QAD ERP database. Normally it is `qaddb`.

Mapped Domain. Select that QAD ERP domain name with which you want to integrate the current instance of the QAD CRM database.

Note A QAD database can have multiple domains. However, any given instance of a QAD CRM database can currently only be integrated with a single domain at a time.

Entity. Enter the primary entity of the above selected domain. The Customer Console module uses this information when it calls QAD ERP AppShell screens.

Configuration File. Enter the path to the configuration file.

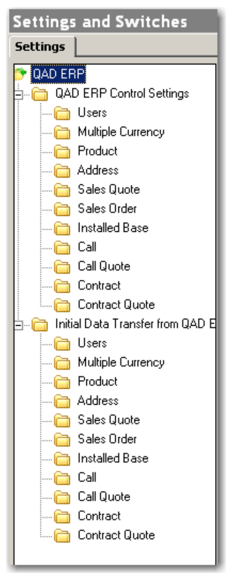
Note The settings in the configuration file are used to connect to the QAD ERP desktop session whenever you click a related hyperlink in Customer Console, or in system-generated reports that display QAD ERP data.

After you save the general integration settings on this tab, use the Switches and Settings option to specify control settings for each module that you want to integrate.

Settings and Switches

The Settings and Switches option lets you define and maintain the control settings for particular modules that you want to include in the integration with QAD ERP. To access this option, go to Main Menu|QAD ERP Integration|Settings and Switches|QAD ERP|QAD ERP Control Settings. This displays the list of functions and modules for which you can maintain and configure settings. Switches let you specify the direction in which the information is transferred—from QAD ERP to QAD CRM or vice versa.

Fig. 11.2 Settings and Switches - QAD ERP Control Settings



Control Settings

To define switches or control settings for a selected module, do the following:

1 In the Settings option, select in the left window pane the component whose switches you want to define. The detailed settings window for the selected option displays in the right window pane.

2 Specify the control setting details for the selected component.

3 Click Save to save any changes to the settings. The changes made to the integration settings will be available at next login.

Users

Use this option to define control settings for transferring user information from QAD ERP.

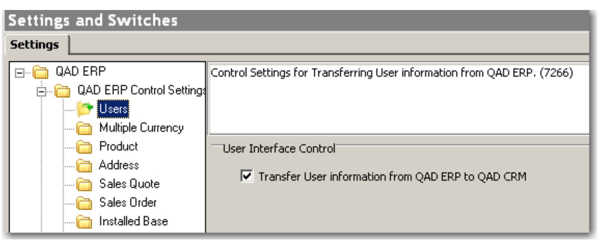


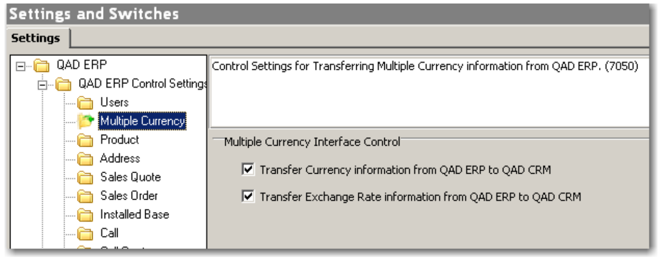
Fig. 11.3
Users

Select the Transfer User information from QAD ERP to QAD CRM check box to activate transfer of user information.

Multiple Currency

Use this option to define control settings for transferring multiple currency information from QAD ERP.

Fig. 11.4
Multiple Currency



Transfer Currency information from QAD ERP to QAD CRM. Select this check box to enable the transfer of currency information from QAD ERP.

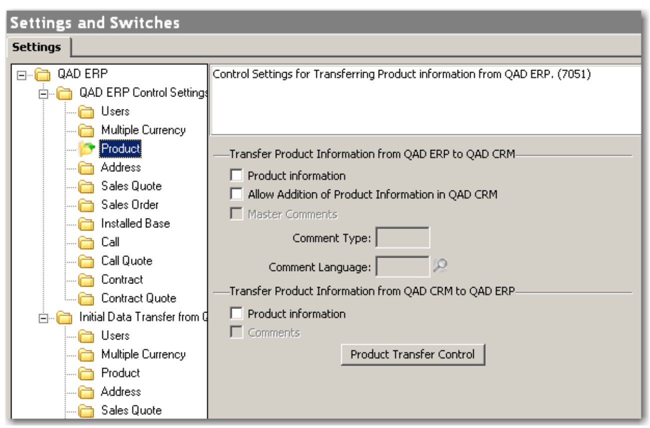
Transfer Exchange Rate information from QAD ERP to QAD CRM.

Select this check box to enable the transfer of exchange rate-related information from QAD ERP.

Product

Use this option to define control settings for transferring product information to and from QAD ERP.

Fig. 11.5
Product



From QAD ERP to QAD CRM

Product Information. Select this check box to enable the transfer of product information from QAD ERP.

Allow Addition of Product Information in QAD CRM. Select this check box to enable QAD CRM to add the product information received from QAD ERP into its database.

Master Comments. Select this check box to transfer master comments from QAD ERP. This option is enabled only when you select the Product Info check box.

Comment Type. Enter a comment type for the transaction.

Comment Language. Choose a comment language from the lookup.

From QAD CRM to QAD ERP

Product Information. Select this check box to enable transfer of product information from QAD CRM to QAD ERP.

Comments. Select this check box to transfer comments from QAD CRM.

After completing the above settings, click the Product Transfer Control button. The Product Transfer Settings window displays.

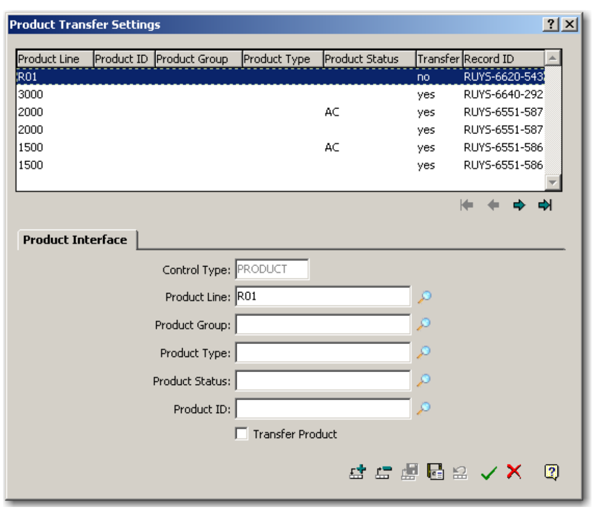


Fig. 11.6 Product Transfer Settings

The Product Transfer Settings window lets you provide details for each product that you want to include in the integration process. It also lets you maintain details for all existing product lines that participate in the integration.

Product Interface

Control Type. Enter the control type for the product selected.

Note This field is currently hard coded to Product and the system does not let you enter any data in this field.

Product Line. Use the lookup to enter the product line.

Product Group. Use the lookup to enter the product group.

Product Type. Use the lookup to enter the product type.

Product Status. Use the lookup to enter the product status.

Note This field is used in all the product transfer control conditions described below.

Product ID. Use the lookup to enter the product ID.

Transfer Product. Select this check box to include the products selected in the browser in the transfer process.

The Product Transfer Settings window checks for product transfer control conditions in the following order:

1. Product ID with Product Status
2. Product Line, Product Group and Product Status
3. Product Line, Product Type and Product Status
4. Product Line and Product Status

The Product Status field is used by the system in all conditions.

Address

Use this option to define control settings for transferring address-related information to and from QAD ERP.

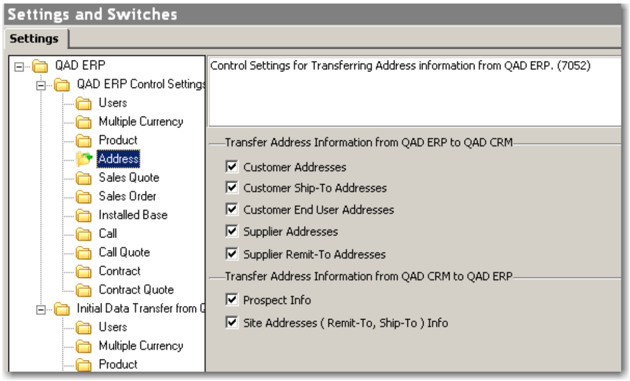


Fig. 11.7
Address

When you click QAD ERP Control Settings|Address, a list of address check boxes displays. These address types are associated with both QAD ERP, and QAD CRM. Select those check boxes for which you want to activate data transfer between applications.

Sales Quote

Use this option to define control settings for transferring sales quotation information to and from QAD ERP.

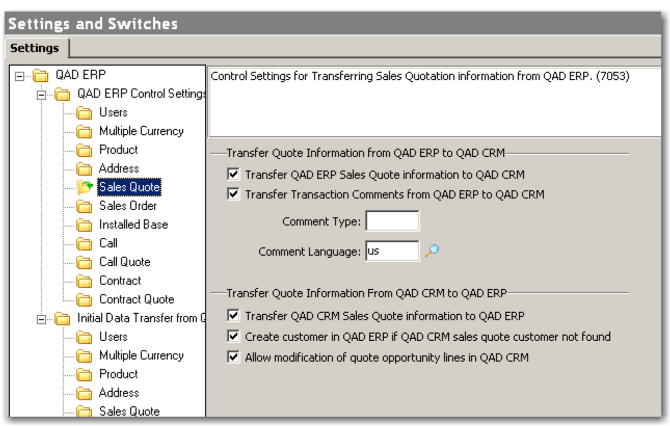


Fig. 11.8
Sales Quote

From QAD ERP to QAD CRM

Transfer QAD ERP quotation information to QAD CRM. Select this check box to enable the transfer of sales quotation information from QAD ERP.

Transfer Transaction Comments from QAD ERP to QAD CRM. Select this check box to enable the transfer of transaction comments from QAD ERP.

Comment Type. Enter comment type for the transaction.

Comment Language. Choose a comment language from the lookup.

From QAD CRM to QAD ERP

Transfer QAD CRM quote lines to QAD ERP. Select this check box if you want to transfer quote lines from QAD CRM to QAD ERP.

Create customer in QAD ERP if QAD CRM sales quote customer not found. Select this check box if you want the details of the QAD CRM sales quote customer to get recorded automatically in QAD ERP during the transfer of sales quote information. This option applies to those cases where a particular QAD CRM prospect does not exist in the QAD ERP database.

Allow modification of quote opportunity lines in QAD CRM. Select this check box if you want QAD ERP users to be able to modify quote opportunity lines in QAD CRM for quotes created in QAD ERP.

Sales Order

Use this option to define control settings for transferring sales order information to and from QAD ERP.

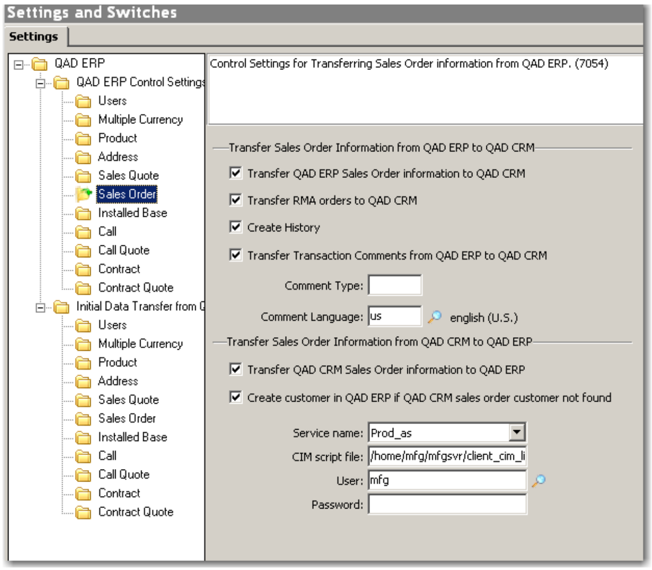


Fig. 11.9
Sales Order

From QAD ERP to QAD CRM

Transfer QAD ERP Sales Order Information to QAD CRM. Select this check box to enable the transfer of sales order information from QAD ERP.

Transfer RMA orders to QAD CRM. Select this check box if you want to transfer RMA orders from QAD ERP.

Note RMA numbers uniquely identify a specific return material authorization (RMA) in QAD ERP. An RMA is used to track items returned from a customer for repair or exchange as well as the items issued as replacements. The RMA serves both as an authorization for the customer to return the items and as an internal tracking number to ensure that they actually are received. All subsequent activity references this RMA number, including any returns to supplier, repair work orders, and billing. Reports and inquiries can also be selected by RMA number.

Create History. Select this check box to enable creation of history records in QAD CRM for all sales order related transactions.

Transfer Transaction Comments from QAD ERP to QAD CRM. Select this check box to enable transfer of transaction comments from QAD ERP.

Comment Type. Enter a comment type for the transaction.

Comment Language. Choose a comment language from the lookup.

From QAD CRM to QAD ERP

Transfer QAD CRM Sales Order Information to QAD ERP. Select this check box to enable the transfer of sales order information from QAD CRM to QAD ERP.

Create customer in QAD ERP if QAD CRM sales order customer not found. Select this check box if you want the details of the QAD CRM sales order customer to get recorded automatically in QAD ERP during the transfer of sales order information. This option applies to cases when a particular QAD CRM prospect does not exist in the QAD ERP database. Such records get created with the use of specified templates. For details, see “Templates”.

Service Name. Select a service name from the drop-down list. The service name you select here is used for Sales Order integration.

Note The Service Name mentioned here may or may not be the same as the one mentioned in the ERP Management Control option.

CIM Script File. Enter the path to the CIM script file. The information contained in this file helps set up database connections, allocate appropriate PROPATH, and select programs to run for the CIM load.

Note Sales Orders are transferred from QAD CRM to QAD ERP using Computer Interface Method (CIM) load. CIM Data Load helps load legacy or non-Progress data from an external source into the QAD ERP database for processing. Using CIM, data can be added using standard program validation. The import data can be in ASCII file format or acquired in real time. The CIM Data Load function takes information and loads it into the QAD ERP database for later processing by the CIM Data Load Processor.

User. Enter the user ID to be used by the CIM file to access the QAD ERP database.

Password. Enter the password for the above user ID to access the QAD ERP database.

Installed Base

Use this option to define control settings for transferring installed base information from QAD ERP.

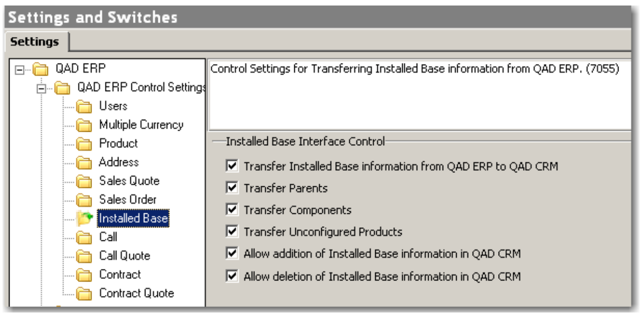


Fig. 11.10
Installed Base

Transfer Installed Base information from QAD ERP to QAD CRM.

Select this check box to enable the transfer of installed base information from QAD ERP.

Note In QAD ERP, whenever an installed base is created, depending on the system settings, the system creates multiple installed base records. For example, if the selected product is a configured product, the system will create installed base records for all the components of the configured product as well as its corresponding parent.

Transfer Parents. Select this check box to transfer installed base records where its product is classified as a parent.

Transfer Components. Select this check box to transfer installed base records where its product is classified as a component.

Transfer Unconfigured Products. Select this check box to transfer installed base records where its product is classified as unconfigured.

Allow addition of Installed Base information in QAD CRM. Select this check box to let QAD CRM create new profitem records whenever installed base information is transferred from QAD ERP.

Allow deletion of Installed Base information in QAD CRM. Select this check box to let QAD CRM delete profitem records whenever the corresponding installed base items get deleted in QAD ERP.

Call

Use this option to define control settings for transferring customer call information from QAD ERP.

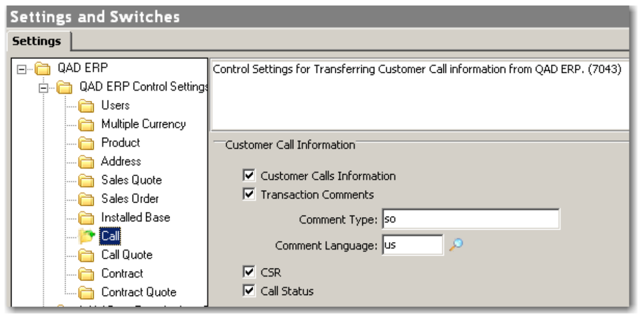


Fig. 11.11
Call

Customer Calls Information. Select this check box to activate the transfer of customer call information from QAD ERP.

Note This is the main control that enables the transfer of calls. Clearing this check box makes the subsequent comments-related check boxes unavailable.

Transaction Comments . Select this check box to enable the transfer of transaction comments.

Comment Type. Enter a comment type for the transaction.

Comment Language. Choose a comment language from the lookup.

CSR. Select this check box to enable the transfer of information related to customer service representatives.

Call Status. Select this check box to enable the transfer of call status information.

Call Quote

Use this option to define control settings for transferring service call quotation information from QAD ERP.

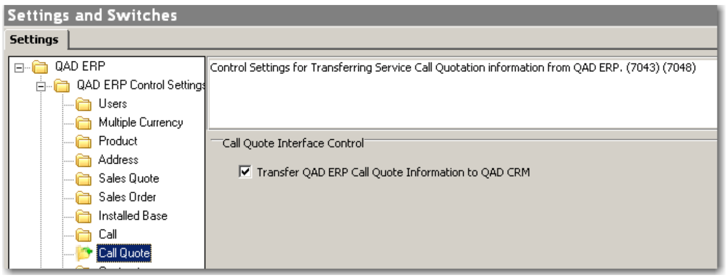


Fig. 11.12
Call Quote

Select the Transfer QAD ERP Call Quote Information to QAD CRM check box to activate the transfer of service call quotation information.

Contract

Use this option to define control settings for transferring service contract information from QAD ERP.

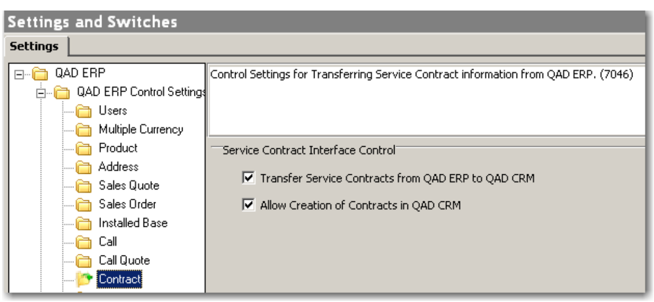


Fig. 11.13
Service Contract

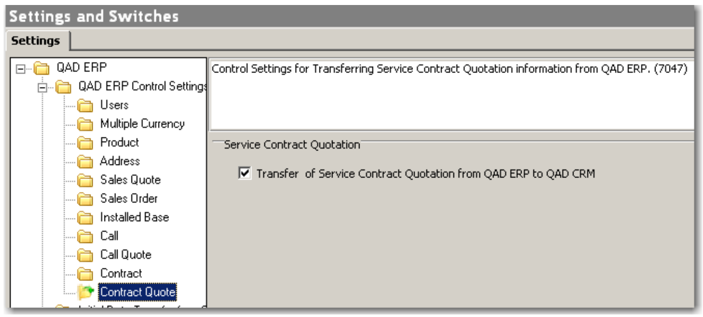
Transfer Service Contracts from QAD ERP to QAD CRM. Select this check box to enable the transfer of service contracts from QAD ERP.

Allow Creation of Contracts in QAD CRM. Select this check box to enable contract creation in QAD CRM.

Contract Quote

Use this option to define control settings for transferring service contract quotation information from QAD ERP.

Fig. 11.14
Service Contract Quotation



Select the Transfer Service Contract Quotation from QAD ERP to QAD CRM check box to activate transfer of service contract quotations.

Initial Data Transfer

The initial data transfer between QAD ERP and QAD CRM marks the success of their integration. The integration automatically synchronizes data between the two systems based on the configuration. However, the initial data transfer from QAD ERP to QAD CRM must be initiated manually. To access this option, go to Main Menu|QAD ERP Integration|Settings and Switches|QAD ERP|Initial Data Transfer from QAD ERP.

Before you can transfer data from QAD ERP to QAD CRM, make sure you have properly configured both applications. For configuration details, see *Installation Guide: QAD CRM*. You must also ensure that the QAD CRM and the QAD ERP databases are connected.

When you initiate the first data transfer from QAD ERP using the QAD CRM working environment, you should transfer the data in the following order:

- Users
- Multiple Currency
- Product
- Address

- Sales Quote
- Sales Order
- Installed Base
- Call
- Call Quote
- Contract
- Contract Quote

To start the data transfer process, do the following:

1. Select a node under the Initial Data Transfer from QAD ERP option. A dialog box displays.
2. Select the check boxes in the dialog box, if any, based on your requirements.
3. Click OK to start the data transfer process from QAD ERP to QAD CRM.

The Product Data node dialog box is displayed below as an example.

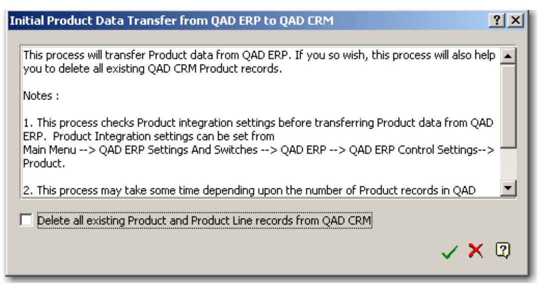


Fig. 11.15 Initial Data Transfer - Product

To determine the result of the initial data transfer, see the .txt files that are created in the <MFG/PRO installation>\log folder. These text files are created in either the `QADSFAandMAInstallation\test\log` or `QADSFAandMAInstallation\prod\log` directory depending upon the environment.

Templates

QAD ERP uses templates for customer and quote records that are transferred from QAD CRM. These templates contain default information, and ensure that the customer and quote records transferred from QAD CRM get saved in the appropriate format in QAD ERP.

QAD ERP creates default values for customers in the cm_mstr table and records quote header default values in the qo_mstr table. It uses the following blueprints for new customers from QAD CRM:

- cm_addr = QADSFAMA is the customer template used to track customer inputs from QAD CRM.
- qo_mstr.qo_nbr = QADSFAMA is the quote template for quote values coming from QAD CRM.

Chapter 12

QAD Remote Sales Integration

This section describes how to set up nodes, configure settings and enable data synchronization for the QAD Customer Relationship Management (QAD CRM) application. It discusses the following topics:

Overview

Off-site personnel using QAD Remote Sales on their remote computers can synchronize data with the host database. This ensures on-site and off-site personnel have access to the latest information.

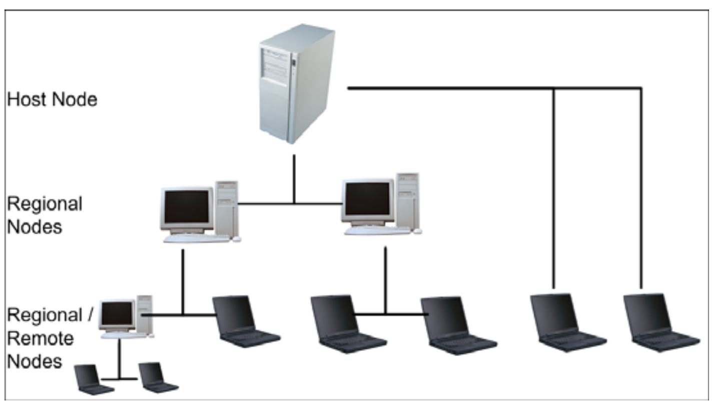
Understanding Nodes

A node is the database that the system uses. The QAD CRM central database is referred to as the *host* node. The QAD Remote Sales database is called the *remote* node. *Regional* nodes are typically QAD CRM databases installed in the regional offices of a company. They can synchronize data with their parent node and subordinate nodes within their region.

Note In this chapter, regional nodes are called remote nodes unless otherwise specified.

All nodes maintain details about other nodes. This assists them in identifying nodes.

Fig. 12.1
Understanding Nodes



Procedure Overview

You can synchronize data between nodes using the AppServer Synchronization method.

To synchronize data:

1 Set up the host, regional, and remote nodes for data synchronization.
2 Set up the QAD AdminService.
3 Prepare regional and remote nodes for data synchronization.
4 Synchronize data using the AppServer method.

Node Setup: Host Node

To set up nodes, you must:

1 Enable data synchronization.
2 Configure the host node.
3 Create and set up regional and remote nodes.
4 Enable AppServer data synchronization.
5 Specify the data available to nodes.

Note You must log in as the QAD CRM administrator to set up nodes. The current node should be the host node. You can identify the current node from the status bar.

Enabling Data Synchronization

You typically enable data synchronization while configuring QAD CRM.

To enable and configure data synchronization from QAD CRM:

1 Choose Main Menu|Remote Sales Data Synchronization|Node Management Control. Then choose Node|Synchronization Settings.
2 Select the Enable Data Synchronization check box.

   Note Make sure that these settings are enabled from a Host session of QAD CRM. Check the status bar to determine the current session.

3 In the No of Days Modified Records to be kept, enter `30`.

Configuring the Host Node

Configuring the host node includes maintaining the node and time zone details.

To configure the host node:

1. Choose Main Menu|Remote Sales Data Synchronization|Remote Node Setup.
2. Right-click the host node and choose Edit. The Node Details dialog box for the host node displays.
3. In the Details tab, edit the following as required:

   Description. Enter a brief description of the host node.

   Time Zone. Enter the time zone of the region where the host node is located.

   Email ID. Enter the host node e-mail address.

4. Close the Node Details dialog box.

Setting Up Remote Nodes

To create a remote node in QAD CRM:

1. Choose Main Menu|Remote Sales Data Synchronization|Remote Node Setup.
2. Right-click the host or regional node and choose Add. The Node Details dialog box displays.

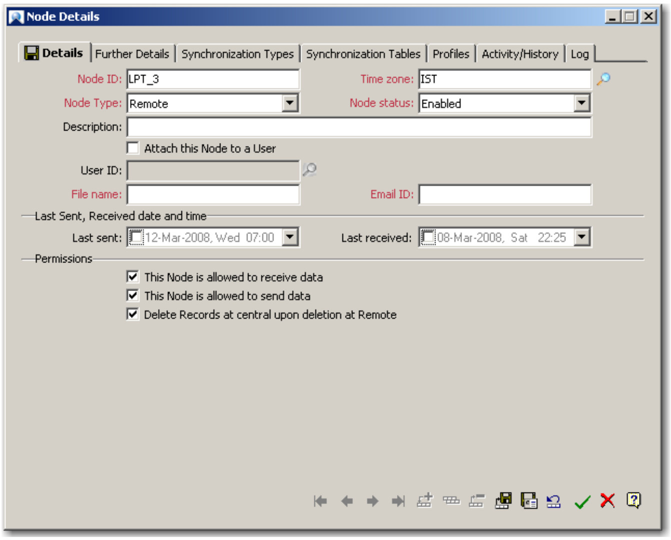


Fig. 12.2
Adding Details of a Remote Node

3 In the Node ID field, enter the node ID.

4 Specify the remote node details.

   a Select Remote from the Node Type drop-down list.

   b In the Description field, enter a brief description of the node.

   c In the Time Zone field, specify the time zone of the remote node.

   d Select the Attach this Node to a User check box. When attaching to a user, the system automatically assigns all the information to the node.

   e In the File name field, enter the name for the host node data subset file. For example, you can enter the name of the node.

   Do not specify the extension; the data subset file is automatically saved in the required format (`.res`).

   f In the Email ID field, enter the e-mail address of the node administrator or user.

   g In the Permissions area, select the permissions you want to grant to the node.

5 Click Save.

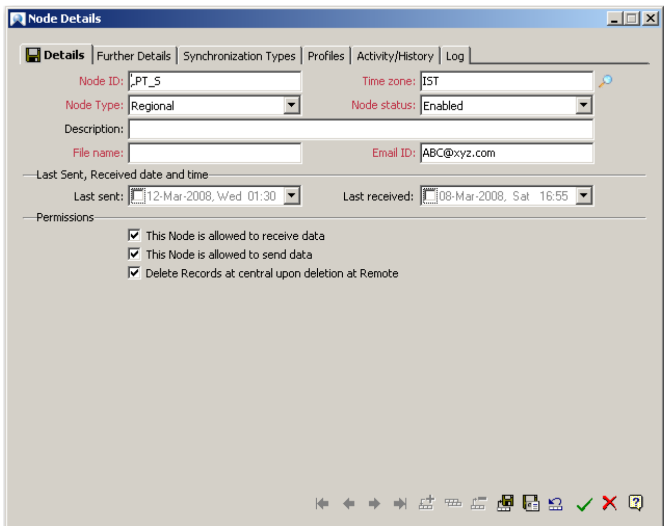
Setting Up Regional Nodes

To create a regional node:

1 Choose Main Menu|Remote Sales Data Synchronization|Remote Node Setup.

2 Right-click the host or regional node and choose Add. The Node Details dialog box displays.

Fig. 12.3
Adding Details of a Regional Node



3 Select Regional from the Node Type drop-down list.

4 Specify the required node details as described in step 4 of the previous procedure. See page 167.

AppServer Synchronization

This section explains the AppServer method of data synchronization, and lists the procedure for setting up nodes using this method of synchronization.

Setting Up Nodes for AppServer Synchronization

To provide regional and remote nodes access to AppServer data synchronization method:

1 Choose Main Menu|Remote Sales Data Synchronization|Remote Node Setup.

2 Right-click the regional or remote node and choose Edit. The Node Details dialog box displays.

3 Click the Synchronization Types tab. The Synchronization Types browser displays.

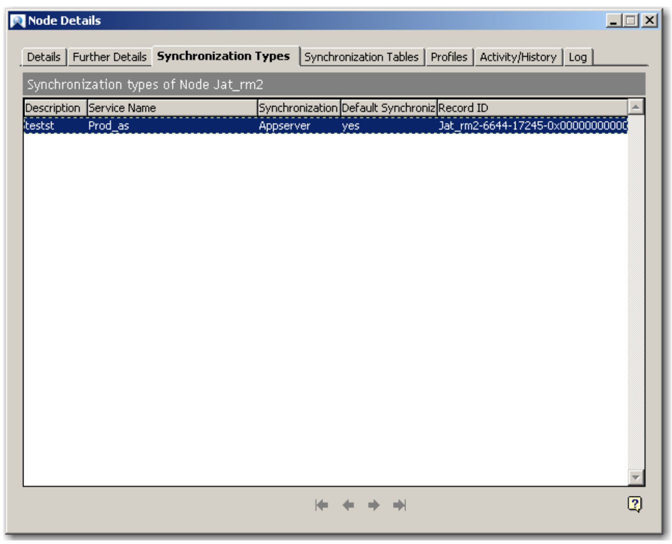
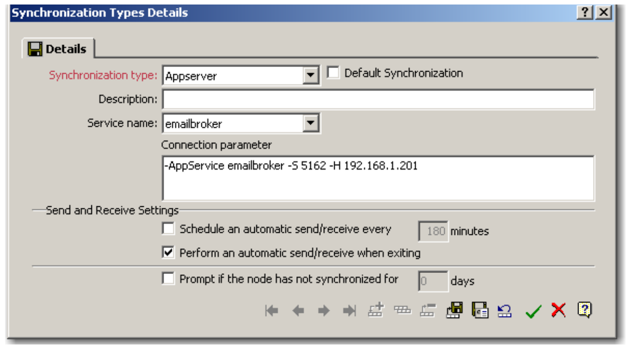


Fig. 12.4
Synchronization Types

4 Right-click in the Synchronization Types browser area and choose Add. The Synchronization Type Details dialog box displays.

Fig. 12.5
Enabling AppServer Method



5 From the Synchronization Type drop-down list, select Appserver.

6 In the Description field, enter a brief description of the method.

7 Select the service name from the drop-down list. This must be defined before setup. You can define services from Settings|System|Appserver Service Maintenance.

8 Define send and receive settings. Click Save and then click Close.

Note You cannot add multiple records for the same synchronization type. You can only edit an existing AppServer data synchronization record. To do this, right-click the record in the Synchronization Types browser and choose Edit. To delete the record, choose Delete from the right-click menu.

For details on enabling AppServer synchronization from regional and remote nodes, see Synchronizing Data Using the AppServer.

Specifying Profile Records

To specify conditions for a node to access profile records during synchronization:

1. In the Node Details dialog box, click the Profiles tab.

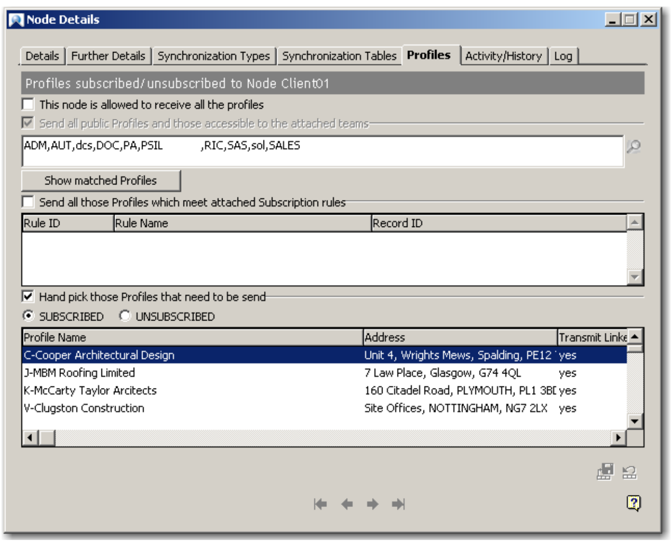


Fig. 12.6
Node Details - Profiles

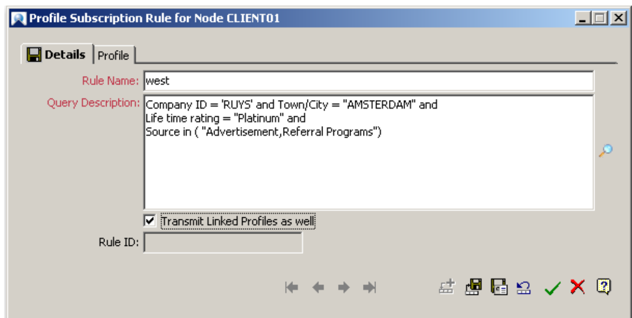
2. If you want the remote node to access all profiles, select the This Node Is Allowed To Receive All The Profiles check box. Then click Save. Skip the following steps.
3. To specify the teams whose profiles the node can access:
   - **a** Select the Send all public profiles and those accessible to the attached teams check box.
   - **b** In the field for teams, use the lookup to enter the teams whose profiles the node can access.
   - **c** Choose the option to subscribe profiles by defining the rules that match other conditions, but do not belong to the teams.

     Note that in addition to profiles associated with teams, you can specify other conditions to select profiles, as described in subsequent steps.

4 To specify a subscription rule for selecting profiles, select the Send all those profiles that meet attached subscription rules check box. Then do the following:

a Right-click the rule area and choose Add. The Profile Subscription Rule dialog box displays.

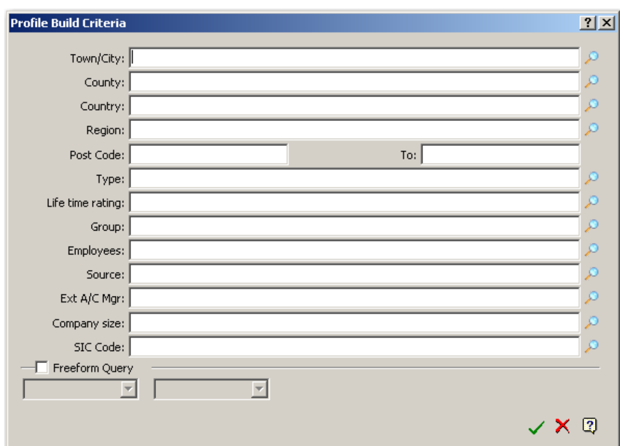
Fig. 12.7
Add a Rule for Selecting Profiles



b In the Rule Name field, enter a descriptive name for the rule.

c Click the lookup button next to the Query Description field. The Profile Build Criteria dialog box displays.

Fig. 12.8
Profile Build Criteria



d Specify the conditions for selecting profiles. Click OK.

e To select all profiles linked with the profiles that comply with the condition, select the Transmit Linked Profiles as well check box.

f Click Save.

To view the profiles that comply with the rules, click the Profile tab. Then select Subscribed.

g Click Close. If profile records match the conditions, the Select an option dialog box displays.

h Choose the option to subscribe or unsubscribe the matched profile records as required and click OK.

In the Node Details dialog box, the rule displays in the list of rules.

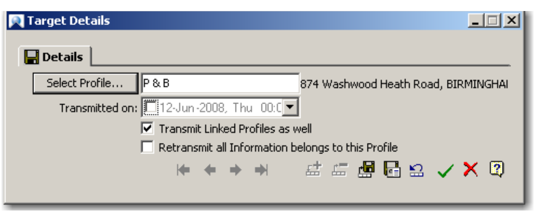
5 To build a list of custom profiles for the node:

a Select the Hand pick those profiles that need to be sent check box.

b To subscribe a profile record, right-click the profile area and choose Subscribe.

c Select the profile record and click Save. Then click Close.

Fig. 12.9
Target Details



d To build a profile list based on your criteria, right-click the profile area and choose Build.

e Specify your criteria and click Save. You can subscribe to all profiles linked to the profiles that match the criteria.

Note Once the selected profiles display, you can unsubscribe them, move them to a different node, retransmit them even if they have not been modified, or detach them from the node. You can select multiple profiles from the lists profiles. To access these options, select the profiles, right-click, and choose the option.

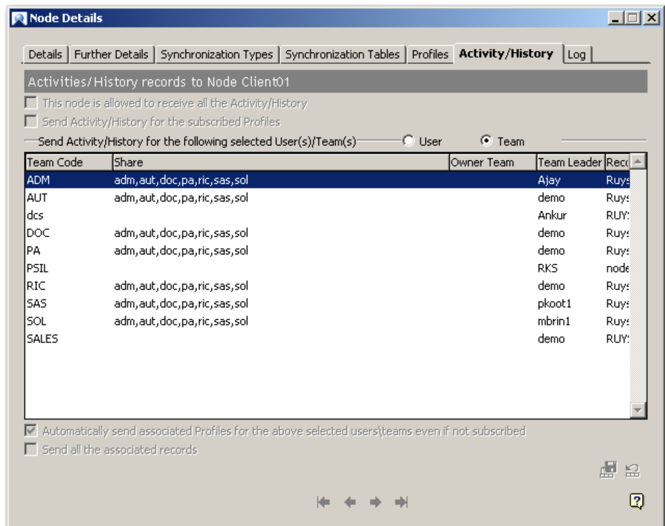
6 Click Save in the Node Details dialog box.

Specifying Activity and Transaction History Records

To specify conditions for a node to access activity and transaction history records during synchronization:

1 In the Node Details dialog box, click the Activity/History tab.

Fig. 12.10
Node Details - Activity/History



2 If you subscribe to all profiles for the node, the option labeled This node is allowed to receive all the Activity/History is enabled.

Select this option to provide the node access to synchronize all activity and transaction history records.

3 If you subscribe to selective profiles, the Send Activity/History for the subscribed profiles option becomes available.

Select this option to provide the node access to the activities and transaction history records of these profiles.

See "Specifying Profile Records" on page 171 for details on specifying profiles.

4. If you want the node to receive relevant profile details when activity records are created by certain users or teams—regardless of whether the profile records associated with the activity records are subscribed or not—do the following:
    a. Select User or Team.
    b. Right-click the record list area and choose Attach.
    c. Select the users or teams. You can select multiple records.
    d. Click OK. The user or team records appear in the record list area.
    e. Select the Automatically send associated Profiles even if not subscribed check box.
5. If you want the node to receive profile associated records, select the Send All The Associated Records check box and then click Save.

Preparing Regional and Remote Nodes

Before creating data subsets for QAD Remote sales, verify that QAD Remote Sales is installed and running.

To prepare regional and remote nodes:

1. Create data subsets for nodes.
2. Load data subsets on nodes.
3. Enable data synchronization from regional and remote nodes.

For details on loading the data subset file and enabling the remote nodes to support data synchronization, refer to *Installation Guide: QAD Customer Relationship Management*.

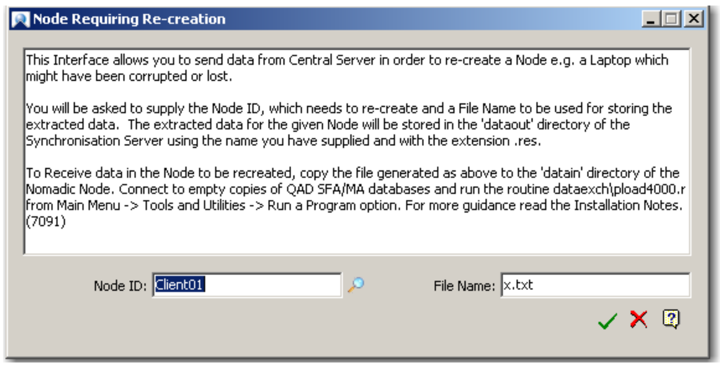
Creating Data Subsets for Remote Nodes

Before creating data subsets, ensure that you have specified the criteria for choosing the data that nodes can synchronize. This data is extracted from the host node to create the data subset.

To extract a host data subset for a regional or remote node:

1. Log in as administrator. The current node must be the host node.
2. Choose Main Menu|Remote Sales Data Synchronization|Extract Data to Recreate a Node. The Node Requiring Re-creation dialog box displays.

Fig. 12.11
Node Requiring Re-Creation



3. In the Node ID field, enter the regional or remote node for which you want to create the data subset.

   The file name specified while creating the node displays in the File Name field.
4. To change the file name of the host node data subset, change the name in the File Name field.
5. Click OK.

The system starts extracting data from the host node and adding it to the data subset file. The data subset file in the `.res` format is stored in *`QADCRMInstallDir`*`\prod\dataout`.

After the data subset creation, the Creation Process Summary message displays. Click the information icon to view details.

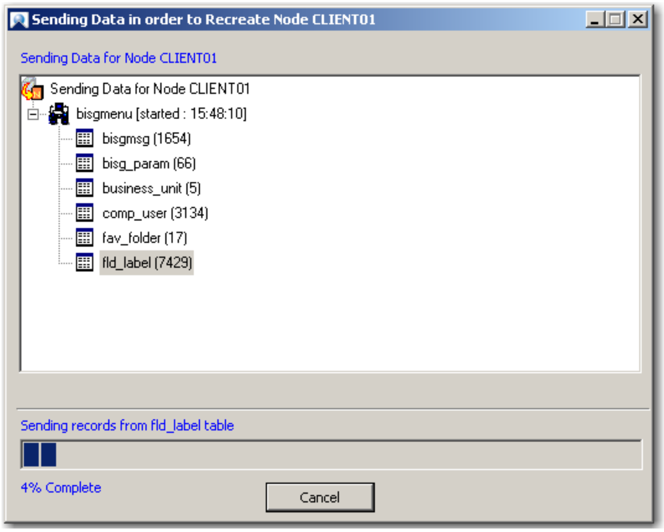


Fig. 12.12A
Creating Host Data Subset for a Node

After the data subset creation, the Creation Process Summary message displays.

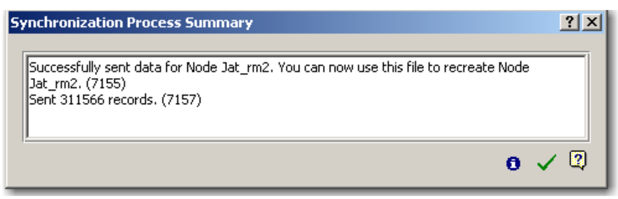


Fig. 12.13
Replication Process Summary Screen

6 Click the information icon on the Replication Process Summary dialog to view the details.

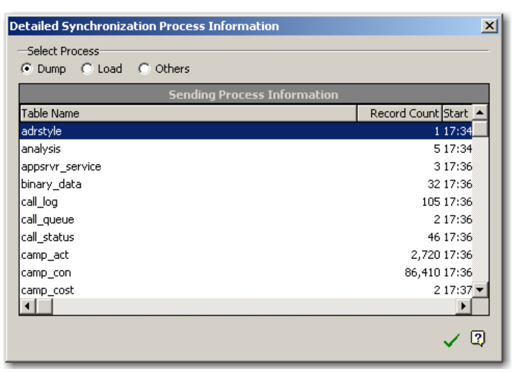


Fig. 12.14
Detailed Synchronization Process Information

Loading Data Subsets on Nodes

1 Copy the data subset file of the node in `.res` format from:

`QADCRMInstallDir\prod\dataout`

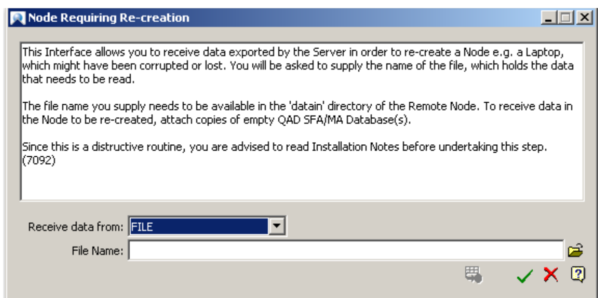
to this directory where QAD Remote Sales is installed:

`QADCRMInstallDir\datain`

2 Log in as `demo` in QAD Remote Sales.

3 Choose Main Menu|Remote Sales Data Synchronization|Load Data to Recreate Current Node. The Node Requiring Re-Creation dialog box displays.

Fig. 12.15
Node Requiring Re-Creation



4 From the Receive data from drop-down list, choose File.

5 In the File Name field, specify the full path and name of the `.res` file you copied in the step 1.

6 Click OK. The system starts loading the data into the personal database. The system displays warning messages before loading the data. Select Yes to these messages.

7 Restart QAD Remote Sales.

Enabling Data Synchronization from Regional and Remote Nodes

To enable data synchronization from regional and remote nodes:

1 Choose Main Menu|Remote Sales Data Synchronization|Node Management Control|Synchronization Settings.

2 Select the Enable Data Synchronization check box.

3 In the No of Days Modified Records to be kept field, type `30`.

4 Restart QAD Remote Sales.

Synchronizing Data Using the AppServer

See “Setting Up Nodes for AppServer Synchronization” on page 169.

To synchronize data using the AppServer method:

1 Choose Main Menu|Remote Sales Data Synchronization|Synchronize Data with Host Computer. The Synchronize Data with the Host Computer dialog box displays.

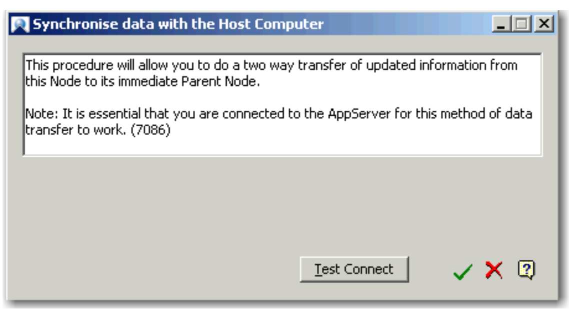


Fig. 12.16 Initiating AppServer Data Synchronization

2 Click Test Connection.

If the AppServer connection parameters are set correctly, a message displays confirming this. Click OK.

The connection may fail if:

- The computer network at the office is down.

- Your computer has a firewall that does not allow the connection to take place.
- The network connection that your laptop is using is slow or down.
- The connection parameters are incorrect.

Restore the connection. Repeat steps 1 and 2.

3 Click Start. The data synchronization starts and the synchronization status displays in the progress window.

   Once the data is synchronized, the Replication Process Summary message displays. Click the information icon to view replication details.

Viewing Synchronization Log

To view the synchronization log of the remote, regional, or host node:

1. Choose Main Menu|Remote Sales Data Synchronization|Remote Node Setup.
2. Right-click the node and choose Edit.
3. Click the Log tab.
4. Select the status type and view the log.

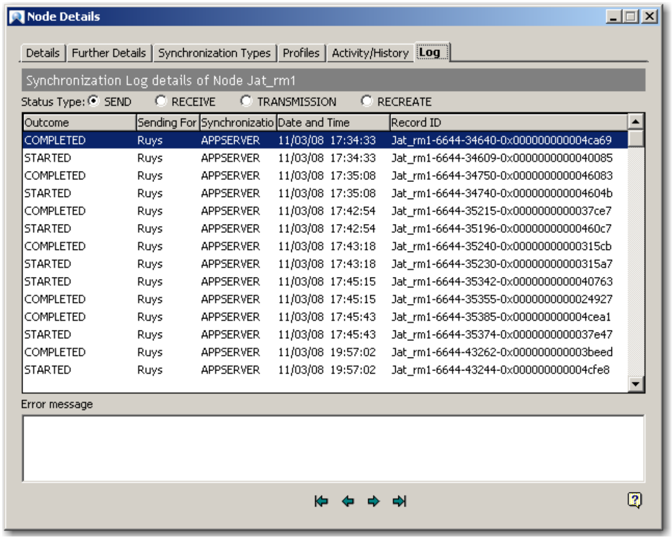


Fig. 12.17
Viewing Log

QAD AdminService and Data Synchronization

QAD AdminService disables the node if a remote node failed to synchronize data for the period specified in QAD CRM.

To manually enable a disabled node for data synchronization:

1. Log in as administrator in QAD CRM.
2. Choose Main Menu|Remote Sales Data Synchronization|Remote Node Setup.
3. Right-click the disabled node and choose Edit. The Node Details dialog box displays. Display the Details tab if it is not already displayed.
4. Select Enabled from the Node Status drop-down list.
5. Click Save.

Chapter 13

Data Management

This section describes how to create queries and run reports using the Reports and Queries module of the QAD Customer Relationship Management (QAD CRM) application. It discusses the following topics:

Overview

The Data Management module consists of the Generic Data Import (GDI) facility and the Global Search and Replace feature. GDI provides you the option to import information from various external sources into the QAD CRM databases. The Global Search and Replace utility allows you to search and replace field values within your databases.

Generic Data Import

For your business generation requirements, you may want to import information from various external sources into the system databases. For example, you may purchase a database from a vendor that contains information on various projects or prospects and would like to integrate it into the system database. Importing such information may be crucial to your organization and instrumental in increasing profitability.

The Generic Data Import (GDI) option provides you a powerful functionality to not only import strategic information into databases, but to also specify your data import preferences. You can access this option from Data Management|Generic Data Import.

Using GDI, you can:

- Set default field values to store in tables while importing data.
- Map fields.
- Import the specified data into tables.
- Specify additional details for importing data.

Understanding the Generic Data Import Process

GDI gives you the flexibility to import information from various sources into the system, including migrating data from other database tables. However, this module requires source data to be in ASCII-formatted files, with `.txt` or `.csv` file extensions.

If your source database files are not in ASCII format, it is recommended that you first convert them. Use a delimiter to separate field values in the source data files.

You can import two types of data in tables using GDI:

- External Data: Data received from external sources like vendors
- Internal Data: Data originally intended to be part of the system database, but being uploaded at a later date

Data Import Table Types

GDI supports data import into the following types of tables:

Table 13.1
Tables Supported for Data Import

Data Import Tables	Purpose
Users	Maintains information about all system users.
Prospect	All the profile organizations registered with the system are stored in this table.
Contact	Details of all the contact persons of profiles are stored in this table.
Product	Details of all products registered with the system are stored here.
Product Line	Details of all product lines for products are stored here.
Opportunity	Maintains information about all opportunities.
Opportunity Line	All the opportunity lines related to an opportunity are stored in this table.
Installed Base	Details of all the installed bases are recorded in this table.
Analysis	Maintains details of analysis codes for profile organizations.
Site Address	Records site addresses of construction projects.
Profile Hierarchy	Details of profile organization hierarchy are stored here.
Literature	Records details of marketing literature.
Quote Header	Details of quotes sent to profile organizations are stored here.
Order Header	Details of all orders are stored here.
Sic Code	Details of Standard Industry Codes (SIC) that categorize various types of industries are stored in this table.

You can choose Multiple as the import option when the data file you import from contains more than one table.

Import File Format

For successful file import through GDI, the content of a data file that is to be imported must be in a specific format. This is because the system identifies table names, field names, and data in the file by its format.

It is recommended that before starting the import process, you open the data file and check the format of its content. The file should have the following data format:

```
[Table Name]

Field Name 1, Field Name 2, Field Name 3

Data 1, Data 2, Data 3

Data 4, Data 5, Data 6
```

In this format:

- Table name can be any text enclosed in [ ].
- Field name can be any text separated by a delimiter. It must not be in quotes.
- Data delimiter is a specific character that delimits or separates the data to be imported in the tables. It can be a space, a comma, a semicolon, or any other special character. You must specify the delimiter used in the data file before you import the data. In the example, comma (,) is used as the delimiter.
- Data is the content that should be exported to system tables from the data file. These information units can be enclosed in quotes, especially when field values contain space characters. Empty quotes ("") represent an empty field value for its record.
- End of a record is marked by paragraph character. It is inserted using the Carriage Return, or the Enter key on the keyboard.
- End of table indicates the end of the data to be imported. It is marked by a full-stop.

Multiple Tables Import

Sometimes, a file may contain multiple tables. The system can import data from multiple tables with in data files, provided they are being imported in the specific tables that support this feature. Following is an example of a file with two tables—prospect and contact.

```
[prospect]

sht, twn, nme, sort_name, ctry, grp, grp_sub, type,
status, acnt_mngr, inside_rep, record_id

"0001030","London","Gardiner & Theobald","Gardiner &
Theobald","England (U
K)","","","Contractor,Customer,Supplier","balbeer","sa
ndeep","000-3945-43109-0x0000a701"

"0001032","Oxfordw","Ridge Management","Ridge
Management","England","","","","balbeer","sandeep","00
0-3945-43110-0x0000a70e"

"0001033","London","John Shreeves &
Partners","","","","","","balbeer","sandeep","000-
3945-43110-0x0000a720"

"0001036","Birmingham","Couch Perry &
Wilkes","","","","","","balbeer","sandeep","000-3945-
43110-0x0000a732"

.

[contact]

show_as, sht, middle_name, position, fore, twn

"Mr John Dudd","0001037","S", "Technical
Director","John","London"

"Mr Eric
Lindley","0001038","D","Consultant","Eric","Sheffield"

"Mr Alan J Young","0001057","J","Snr
Manager","Alan","New York"

"Ms Jane Young","0001224","J","Business
Analyst","Jane","London"

.
```

In the above example:

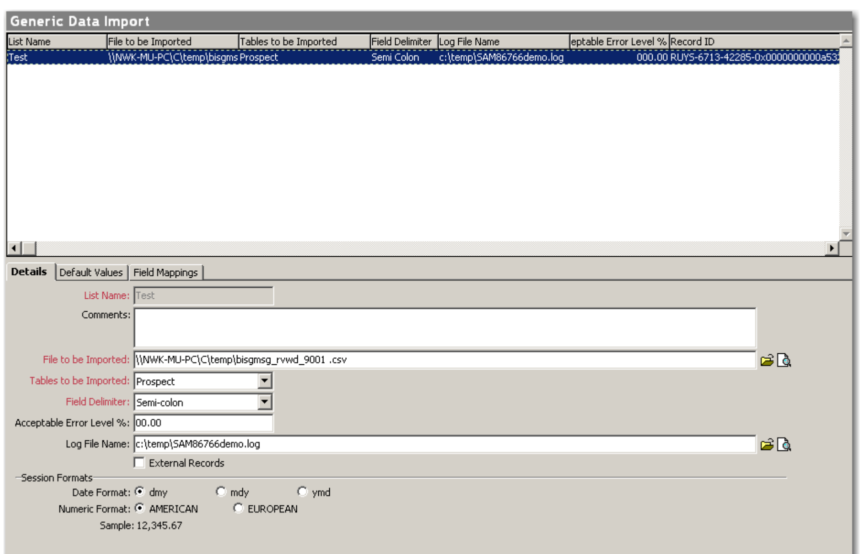
- Since each record in the [prospect] table is long and cannot fit in a visible line, it is carried on to the next line. However, each record ends with a 'paragraph end' character.
- Quotes ("") indicate an empty field value.
- In data files with multiple tables, the main or primary table should be placed before the dependant table. As in the above example, the Prospect table is placed before the Contact table as the Prospect table is the primary table. Data in the Contact table depends on the Prospect table as each contact record is typically linked to a prospect record.

Note If the records that you want to import already exist in a system table, they will be overwritten by the import process.

Manage Data Import

You can manage data import records from the GDI option. Right-click in the browser area and add, edit, copy, or delete a data import record from the list displayed.

Fig. 13.1 Generic Data Import



Details

Use the Details tab to record specifications for importing data from a file into a table.

List Name. Enter a descriptive name you want to give to the import record. Typically, this is the name of the source from where the data file was acquired. You should specify the same list name each time you import data from this source. The system uses this name for mapping fields and importing data.

Comments. Enter additional information about the file you will import.

File to be Imported. Enter the name and the full path to the data file you want to import. Click the Open Folder icon next to this text box to select the file from your computer or network. To open the data file and view its contents, click the View icon next to this text box.

Note It is recommended that you view the contents of the import file to ensure that its data is in the required format.

Tables to be Imported. Select the system table where you want export the data. If the import file contains multiple tables, select Multiple.

Field Delimiter. Select the field delimiter used in the import file for separating field data. If the delimiter is not in the list, select Others. A text box displays. In this text box, type the delimiter.

Acceptable Error Level %. Enter the numeric error acceptance percentage that is permissible for the data import process. Set it high—like 80%—if you want to continue the import process even when it encounters some errors, and low—like 10%—when you want the process to stop if it encounters errors.

Log File Name. Enter the name and the full path of the log file that should contain the error logs, if any, of the import process. Click the Open Folder icon to select the file from your computer or network. When the log file is ready after the import process ends, you can view it by clicking the View icon.

External Records. Select this check box if the import data file contains data from an external source.

Date Format. Select the appropriate date format from the radio buttons.

Numeric Format. Select the numeric format. You can choose from the American and European formats. The sample of the selected numeric format displays.

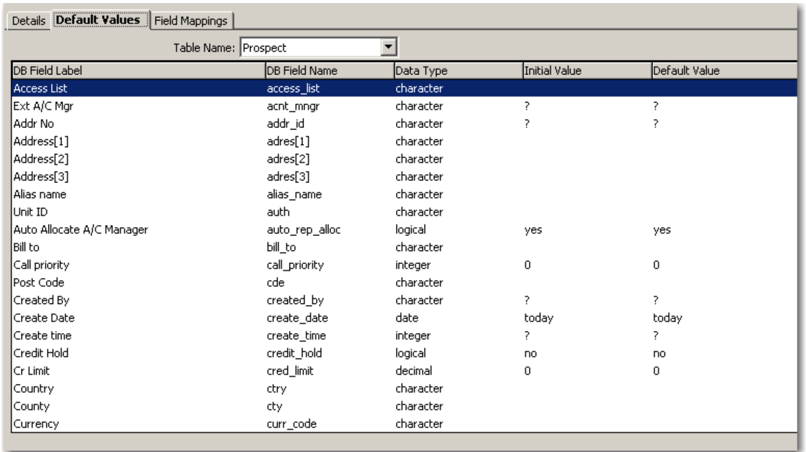
Default Values

Default data value for a field is the data that is automatically entered in the field during data import. GDI gives you the flexibility to specify default data values for fields.

Using the Default Values tab you can manipulate the data values that will be entered into table fields while importing data. See the examples below to help understand this feature.

Example While importing project data from a file you acquired from a vendor, you want to specify the name of the vendor in a field named Source Information. You can include the vendor name by setting the default value for Source Information before starting the import process.

Example You receive a list of prospects and their addresses from an external source. You want to allocate account managers to them right away. Instead of going and adding this information to each prospect record in the data file, you add this information in the Default Values tab by setting the default value for the relevant field. During the import, this information gets updated directly in the database.



Details | **Default Values** | Field Mappings

Table Name: Prospect

DB Field Label	DB Field Name	Data Type	Initial Value	Default Value
Access List	access_list	character		
Ext A/C Mgr	acnt_mngr	character	?	?
Addr No	addr_id	character	?	?
Address[1]	adres[1]	character		
Address[2]	adres[2]	character		
Address[3]	adres[3]	character		
Alias name	alias_name	character		
Unit ID	auth	character		
Auto Allocate A/C Manager	auto_rep_alloc	logical	yes	yes
Bill to	bill_to	character		
Call priority	call_priority	integer	0	0
Post Code	cde	character		
Created By	created_by	character	?	?
Create Date	create_date	date	today	today
Create time	create_time	integer	?	?
Credit Hold	credit_hold	logical	no	no
Cr Limit	cred_limit	decimal	0	0
Country	ctry	character		
County	cty	character		
Currency	curr_code	character		

Fig. 13.2
Default Values

To set the default data value for a table field, do the following:

1. Select the data import record from the GDI browser and click the Default Values tab.
2. Select the relevant system table from the Table Name dropdown. All the fields in the selected table are listed, including the field label, field name, data type, initial value, and default value.
3. Select the field record whose default data value you want to specify.
4. Right-click and select Set Default Value. The Default Value field of the selected record becomes editable.
5. Enter the default value in the Default Value column for the selected field record and press Enter.
6. Click Save to save the record.

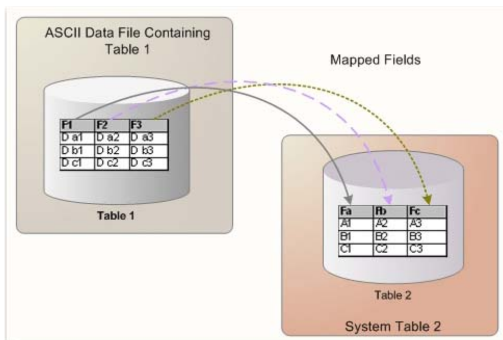
Note If the field for which you specify a default value already has a value assigned to it in the import data file, the default data value will be overwritten by the value in the data file. For example, assuming you specify the default data value for the field `prospectsource` as `ABC`, and the data file has the value `DUN BRD` for the same field (or the field mapped to `prospectsource`). In such a case, the GDI process will assign the value `DUN BRD` to the `prospectsource` field.

Field Mappings

Field mapping is a powerful functionality that provides you the flexibility to map data according to your requirements. Field maps determine which field information from the data file table must go in the field in the system table.

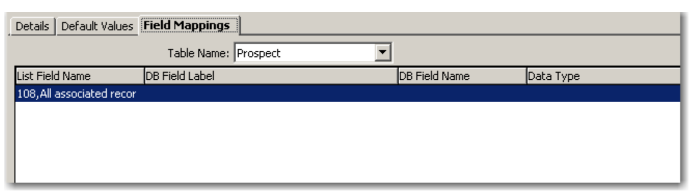
Before you can map fields, you must specify the system table to import information from the data file table. The GDI function automatically maps fields in the data file table to its corresponding system table.

Fig. 13.3
Field Mapping Process



However, at times you may want to change these maps. For example, while specifying details for importing a data file to the system table, the GDI process may map the field `P_name` to the table field `Sort Name`. You can correct this by mapping `P_name` to `Profile Name`.

Fig. 13.4
Field Mappings



To change the mapping of a data field to the field in a system table, do the following:

1 Select the data import record from the List screen and click the Field Mapping tab.The list of mapped fields in the data file table and the table displays. The system automatically creates these maps.

2 Select the relevant table from the Table Name dropdown. All the fields in the selected table are listed under the DB Field Label Column. The corresponding data fields are listed under the List Field Name column.

3 Select the field record for which you want to change the mapping.

4 Right-click and select Map this Field. The DB Field Label value changes into a dropdown listing the system table fields.

5 Select the relevant field from the dropdown and press Enter.

6 Click Save to save the record.

7 To change more field maps, repeat steps 3-5 and save the changes.

Make sure you save the data import record before starting the import process using GDI.

Data Import Process

You can import data using GDI after you have created a data import record, specified default data values, and mapped fields in the data file table to the system table. Before you start importing data, make sure you have saved the information you specified in all the screens of the Generic Data Import module.

To start the data import process, do the following:

1 Select the data import record from the GDI browser.

2 Right-click and select Start Import.

GDI starts importing data from the specified data file into the specified system table. If the data file has multiple tables, the module imports data into the corresponding tables.

When the data import ends, the system displays a confirmation message. To confirm that the data was successfully imported, open the appropriate module and look for the imported data.

You can also check the log file associated with the import record to see if the process encountered any errors. Errors recorded during import are shown in the specified log file in the following format:

```
Record Number <Line where error occurred> , Invalid
<Field name> <error number>

...
```

The log file is saved at the location specified in the Details tab.

Global Search and Replace

The Global Search and Replace utility allows you to search and replace field values within the QAD CRM databases. The system uses the following databases:

Table 13.2
System Databases

Database Name	Description
bisgen	Contains most of the data you work with while using the system
bisgmenu	Contains data related to system setup, including companies, users, and menus, among other setup data
dataexch	Contains data related to data synchronization, including nodes, collision rules, and replication logs, among other data.

The data in these system databases is managed and maintained through modules. But changing something in one or all the databases can be a tedious process. For example, searching for CA and changing it to California in all profile records can take significant time and effort. The global search and replace utility of the Data Management module facilitates such tasks.

This utility lets you search and replace field values within the system databases. You can specify up to five custom conditions for searching and replacing data. You can also store details of replaced data in a log for later reference.

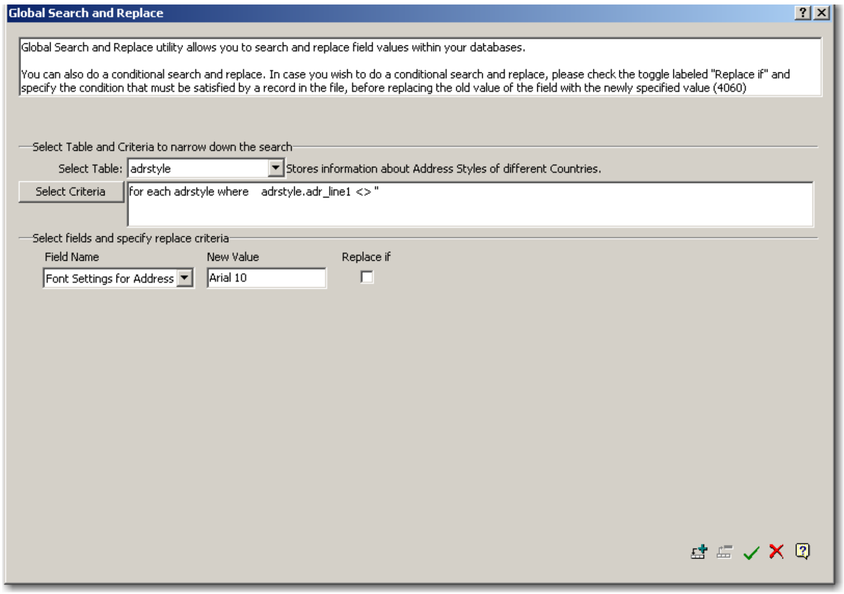


Fig. 13.5
Global Search and Replace

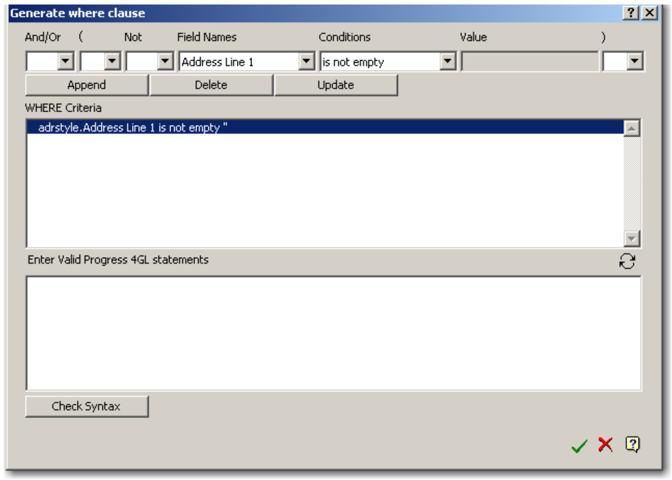
To perform global search and replace, do the following:

1 Use the Select Table dropdown to select the table in which you want to change data through search and replace. For example, to search profile records, select prospect. The table description appears alongside.

2 Click the Select Criteria button. The Generate Where Clause window displays.

3 Specify the search conditions in this window and save your settings.

Fig. 13.6
Generate Where Clause



The criteria you created through the Generate Where Clause window displays in the Select Criteria text box.

4 Use the Field Name dropdown to select the field you want to replace. Enter the new value in the adjoining text box.

5 In case you want to perform conditional search and replace, select the Replace If check box. This displays field name and condition dropdowns.

6 Specify the condition that must be satisfied by a record in the file, before replacing the old field value with the new value.

Example To change CA to California in profile records, select County (cty) from the Field Name list and type California in the New Value text box. Select Replace If and select is (exactly) from the Operator list. Type CA in the Existing Value text box.

You can specify up to five conditions. To add another condition click the Add button. To remove a condition, click the Delete button.

7 Click Save to start the global search and replace process. The system displays a message to confirm global search and replace based on the specified conditions.

8 Click Yes. The system begins to search and replace the data based on your conditions. This process may take several minutes.

Note Once you replace a term using the search and replace utility, you cannot undo the task. It is therefore advisable to ensure the validity of the search and replace task before using this utility.

In the Log File Name text box, enter or select the log file in text format (`.txt`) where you want to store details of the search and replace operation. To select the log file, click the Folder icon, browse and select the log file, and click Open.

To open the log file and view its contents, click the Open icon.

Chapter 14

Microsoft Exchange Server Integration

This section describes how to integrate Microsoft Exchange Server with QAD Customer Relationship Management (QAD CRM). It discusses the following topics:

Overview

QAD CRM can be integrated with Microsoft Exchange Server 2003 to store references to e-mail messages sent and received from Microsoft Exchange Server 2003, as well as synchronize details of contact persons and activities between the two applications.

Integrating Microsoft Exchange Server 2003 and QAD CRM requires you to:

1. Configure the servers.

   a. Configure Microsoft Exchange Server 2003. This includes creating a user with privilege to access mailboxes.

   b. Configure QAD AdminService.

      The QAD CRM installation process installs QAD AdminService when you install QAD CRM on a Windows 2000 or Windows 2003 server. QAD AdminService can be configured to periodically synchronize data between the two systems.

   c. Configure QAD CRM. QAD AdminService uses these settings to synchronize data.

2. Install a Component Object Model (COM) add-in on Microsoft Outlook. This creates the custom buttons required for integration.

   COM add-ins let you create a single add-in that is available to various Microsoft Office applications, extending the functionality of your Microsoft Office-based applications.

Integration is automatic and data synchronization takes place at the back end. It is flexible and provides data security. You can specify information, conditions, and schedule to synchronize data.

Multiple Exchange servers can be supported as long as the servers are in the same domain.

Synchronization events are recorded by the system in the event log. Synchronization errors are sent to the administrator via e-mail for correction.

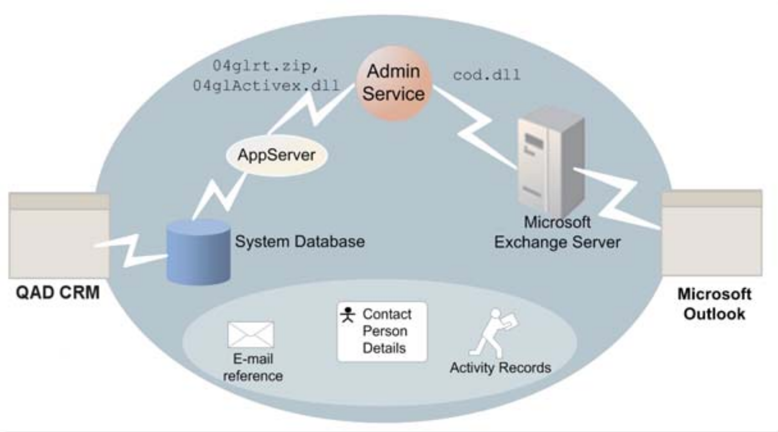


Fig. 14.1 Integration with Microsoft Exchange Server 2003

Integration Prerequisites

Before performing the integration:

1. Refer to *Installation Guide: QAD Customer Relationship Management* for details on which versions of Microsoft Exchange Server are supported.
2. Create a mailbox in Microsoft Exchange Server 2003 for all the QAD CRM users that you plan to configure for Microsoft Exchange Server 2003 integration.
3. Install and configure QAD AdminService. For details, refer to *Installation Guide: QAD Customer Relationship Management*. For configuration details, see Chapter 10, "QAD AdminService," on page 129.
4. Ensure that Progress AppServer is configured and running. QAD AdminService synchronizes data between QAD CRM and Microsoft Exchange Server 2003 using Progress AppServer.
5. Install and configure QAD CRM.

Setting Up Microsoft Exchange Server

Follow the procedure below to set up Microsoft Exchange Server 2003 for integration with QAD CRM.

1 Create a superuser in Microsoft Exchange Server 2003 called `qadsfama` with a tooltipmailbox. Do the following on the server:

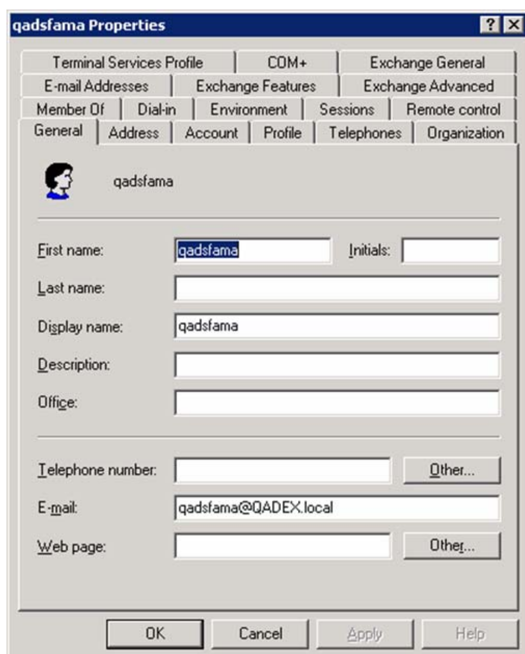
   a Choose Start|All Programs|Administrative Tools|Active Directory Users and Computers. The Active Directory Users and Computers tool starts.

   b Right-click the User node in the left pane and choose New|User.

   c Enter `qadsfama` in the First Name and User logon name fields. Click Next.

   d Select the `qadsfama` user and verify substeps e–g by right-clicking the new user and then choosing Properties.

Fig. 14.2
Properties - General Tab



e Check the e-mail address of `qadsfama`—it should be qadsfama@*yourdomain*. For example, if your domain name is `test.com`, your e-mail address should be `qadsfama@test.com`.

f Click the Member of tab (see Figure 14.3) and ensure that `qadsfama` is a member of the Domain Users group. If not, select Domain Users and click Add to add the user to the group.

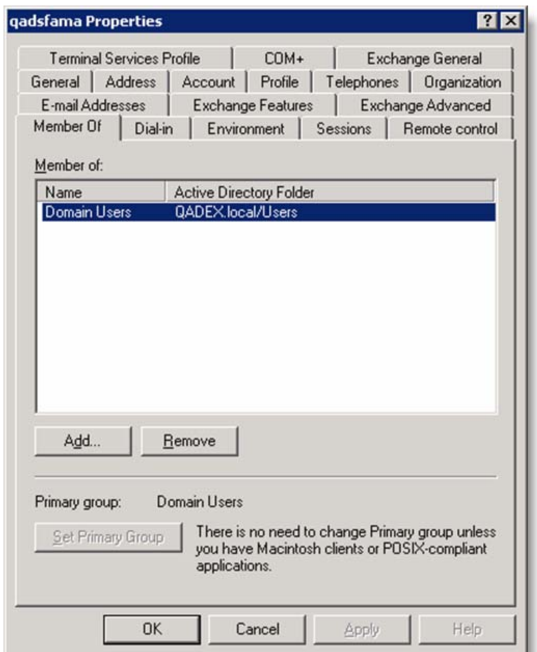
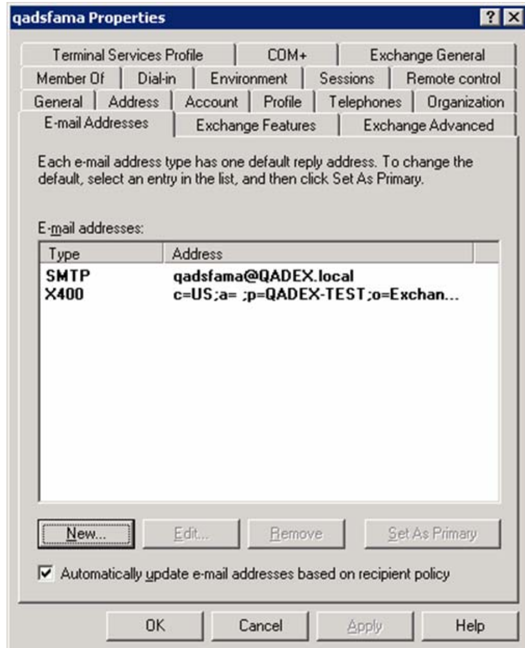


Fig. 14.3
Properties - Member Of Tab

g Click the E-mail Addresses tab and check the e-mail addresses of `qadsfama` as shown in Figure 14.4. Information may vary depending upon your installation. If the e-mail address entries are missing, create them by clicking New.

Fig. 14.4
Properties - E-mail Addresses Tab



2 Enable the `qadsfama` user to access private mailboxes allocated to system users. Do the following on the server:

a Choose Start|All Programs|Microsoft Exchange|System Manager. The Exchange System Manager tool displays.

b In the left pane, choose Administrative Groups|First Administrative Group| Servers|*exchangeserver*|First Storage Group|Mailbox Store (*servername*).

c Right-click and choose Properties. The Mailbox Store (*servername*) Properties dialog box displays.

d Click the Security tab. Then click Add.

e Enter `qadsfama` in the Enter the object names to select (examples) text field and click Check Names.

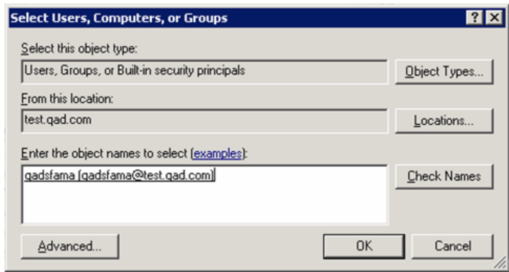


Fig. 14.5
Select Users, Computers, or Groups box

f Click OK.

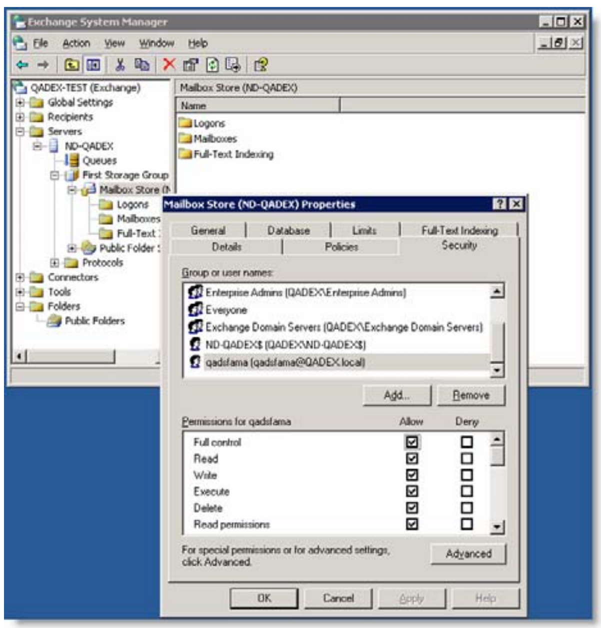
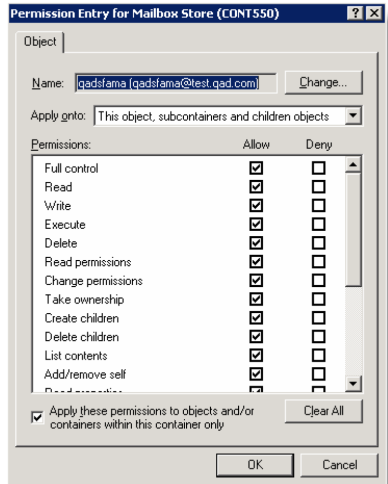


Fig. 14.6
Properties - Member Of Tab

g In the Permissions for `qadsfama` list, select the Full Control, Send As, and Receive As permission options, if not already selected. These permissions enable `qadsfama` to process mailboxes for e-mail synchronization.

h Click Advanced. Double-click the qadsfama user. The Permission Entry for Mailbox (*servername*) displays.

Fig. 14.7
Permission Entry for Mailbox Store



- **i** In the Apply onto drop-down list, select the This object, subcontainers and children objects option, if it is not already selected.
- **j** Click the Apply these permissions to objects and/or containers within this container only option, if not already selected.
- **k** Click Apply.
- **l** If there are multiple storage groups or mailbox stores, repeat steps b–k for each.

3 The `qadsfama` user should have full permission to Public storage. To check the permission, in a client machine where Microsoft Outlook is installed, create a Microsoft Outlook Profile for `qadsfama` and check the permission. If `qadsfama` does not have the permission, enable the permission from Start|Programs|Microsoft Exchange|System Manager.

Configuring the Integration

You enable and configure the integration from QAD CRM. To configure the integration, you must log on as qadsfama.

Note After configuring the integration, restart your system to make the changes take effect.

Enabling the Integration

To enable the integration and specify the direction of data flow for synchronization:

1. Modify the hosts file of the server where QAD CRM is installed. Map the IP address of the Exchange Service machine to the name of the machine. For example:

192.168.1.100	qadex
192.168.1.100	IP address of the Microsoft Exchange Server machine
qadex	Name of the Microsoft Exchange Server machine

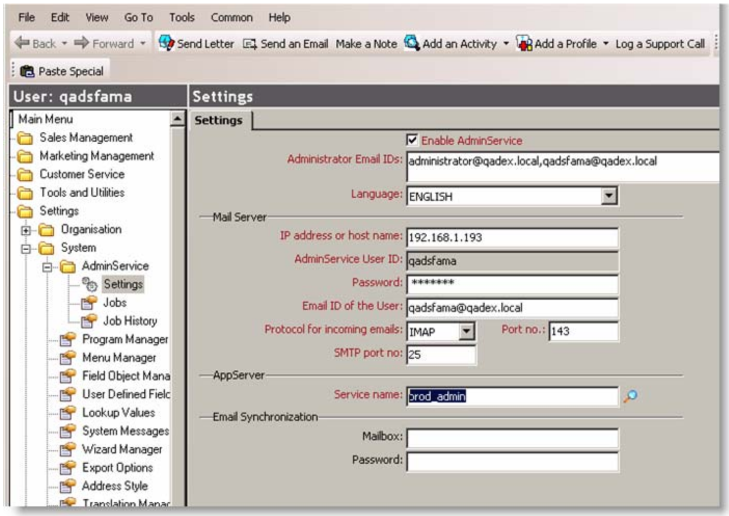
   The hosts file stores information on where to find a node on a computer network. This file maps hostnames to IP addresses. The hosts file supplements (or replaces) the domain name system on computer networks. Unlike DNS, the hosts file is controlled by the user who is using the computer.

   On a Microsoft Windows server, the hosts file is located in `C:\windows\system32\drivers\etc`.

2. Log on to QAD CRM as user `qadsfama`. From the application menu menu, choose Settings|System|AdminService|Settings.

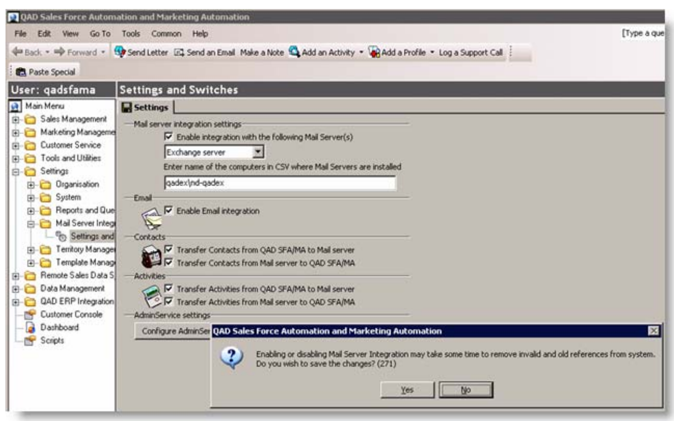
   Ensure that QAD AdminService is enabled and configured. The password for the Microsoft Exchange user `qadsfama` should be the same as that for the `qadsfama` user specified in the QAD AdminService settings.

Fig. 14.8
Properties - Settings Tab



3 Choose Main Menu|Settings|Mail Server Integration|Settings and Switches.

Fig. 14.9
Settings



4 In the Settings tab, select the Enable Integration with the following Mail Server(s) check box. Select Exchange Server from the drop-down list.

5 In the Enter name of the computers in CSV where mail servers are installed field, enter the name of the server where Microsoft Exchange Server 2003 is installed.

6 To enable e-mail reference synchronization, select the Enable Email Integration check box.

7 To enable contact details synchronization, do the following as required:

   a Select the Transfer Contacts from QAD CRM to Mail Server check box to send contact information from the system to Mail server.

   b Select the Transfer Contacts from Mail Server to QAD CRM check box to send contact information from Microsoft Exchange Server 2003 to the system.

8 To enable activity synchronization, do the following as required:

   a Select the Transfer Activities from QAD CRM to Mail Server check box to send activity information from the system to Microsoft Exchange Server 2003.

   b Select the Transfer Activities from Mail Server to QAD CRM check box to send activity information from Microsoft Exchange Server 2003 to the system.

9 Click Save and then select Yes to the question.

Depending on your settings, the Email, Contacts, and Activities tabs display. The left menu navigation pane includes the Mailbox Management and Public Folder Maintenance options under Settings|Mail Server Integration.

Associating Mailboxes with Users

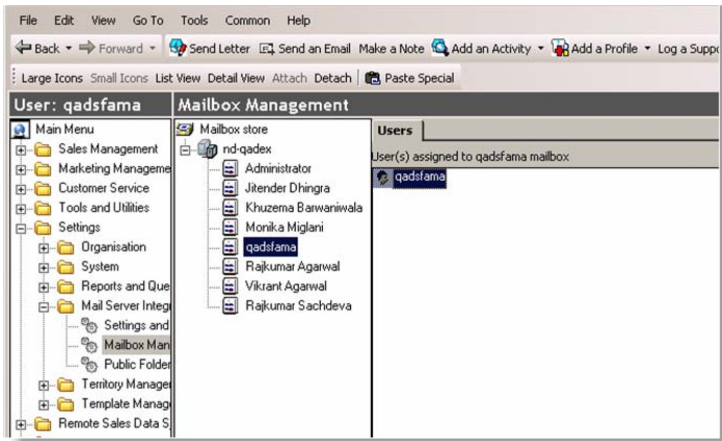
For proper data synchronization, QAD AdminService needs to know which QAD CRM user is mapped to a Microsoft Exchange Server user.

You can specify this mapping after you enable integration. Mapping is vital for e-mail and activity synchronization as e-mail messages appointments and tasks are stored in private mailboxes. You must map a mailbox to one system user. QAD AdminService uses the Exchange Server user account `qadsfama` to access these private mailboxes.

To map Microsoft Exchange Server 2003 users with QAD CRM users:

1. Restart your QAD CRM system.
2. Choose Main Menu|Settings|Mail Server Integration|Mailbox Management. Assign Exchange mailbox `qadsfama` to the QAD CRM user `qadsfama` and other users to their mailboxes as described next.

Fig. 14.10 Mailbox Management - Users



3. Expand Mailbox Store to view all Exchange Server mailboxes, if not visible.
4. Click the Users tab to view system users that are not mapped to mailboxes.
5. Identify the mailbox and the system user you want to map.
6. Drag the system user and drop it on the mailbox. This attaches the system user to the Microsoft Exchange Server 2003 mailbox.
7. Repeat steps 5 and 6 if you want to map more users.

   Note To detach a user from a mailbox, right-click the user and choose Detach.

8. Log off and log on again using `qadsfama`.

Setting Up E-Mail Integration

Users can send e-mail messages from their QAD CRM client via any messaging client installed on their computer. If integration is enabled, the system uses Microsoft Outlook as the default messaging client.

To set up e-mail reference synchronization in the system:

1 Choose Main Menu|Settings|Mail Server Integration|Settings and Switches.

2 Click the Emails tab.

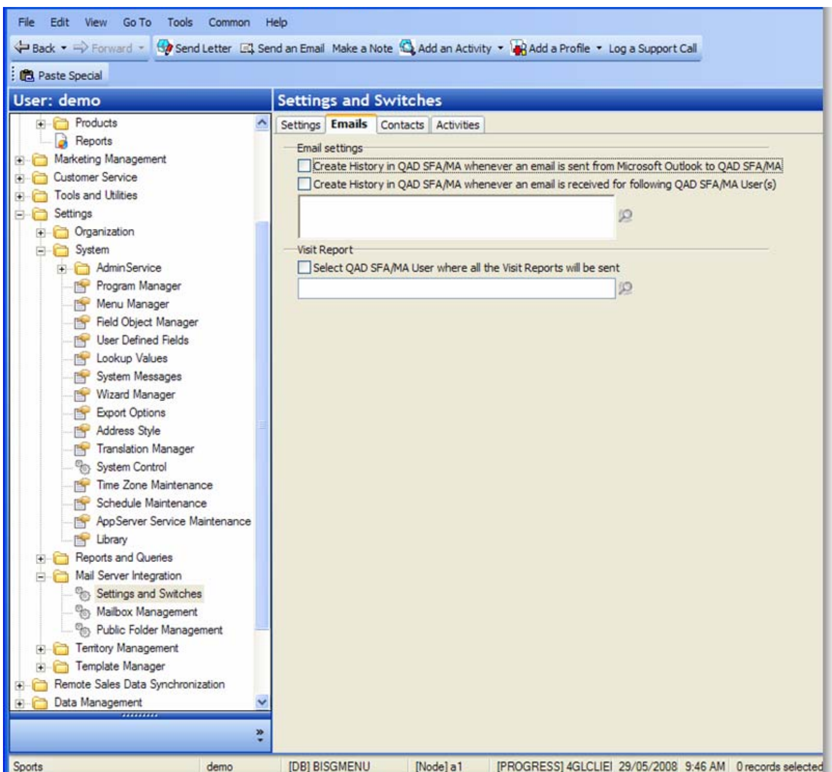


Fig. 14.11 Settings and Switches - Emails

3 You can create a history record in the system when an e-mail message is sent from Microsoft Outlook using the Send to History custom button. To do so, select the Create History Whenever An Email Is Sent From Microsoft Outlook check box.

4. To create a history record in the system when an e-mail message is received in specified mailboxes:

   a. Select the Create a History when e-mail is received for the following mailboxes check box.

   b. Enter the mailbox names.

   Use this option to create mailboxes for specific tasks. For example, you can create a Support mailbox to receive e-mail messages from customers requesting assistance.

5. To create history records from e-mail messages received in a specific mailbox:

   a. Select the Mailbox for Scanning Visit Reports check box.

   b. Enter the mailbox name.

      Users, typically sales personnel, can compose an e-mail message detailing an activity and send it to this mailbox with this subject:

      Visit Report <*contact e-mail address*>

      QAD AdminService scans such e-mail messages, extracts the contents, and creates a history record.

6. Click Save.

Setting Up Activity Integration

The system supports the following activity types:

- Telephone
- Letter
- E-mail
- Appointment
- Script
- Task

Microsoft Exchange Server 2003 supports these item types:

- Appointment
- Task

For synchronization, system activity types must be appropriately mapped to Microsoft Exchange Server activity types. The appointment and task type activities of both systems are mapped by default and cannot be changed. You must map other activity types, as well as set up activity synchronization.

Setting Up Activity Synchronization

To set up activity details synchronization in the system:

1 Choose Main Menu|Settings|Mail Server Integration|Settings and Switches.

2 Click the Activities tab.

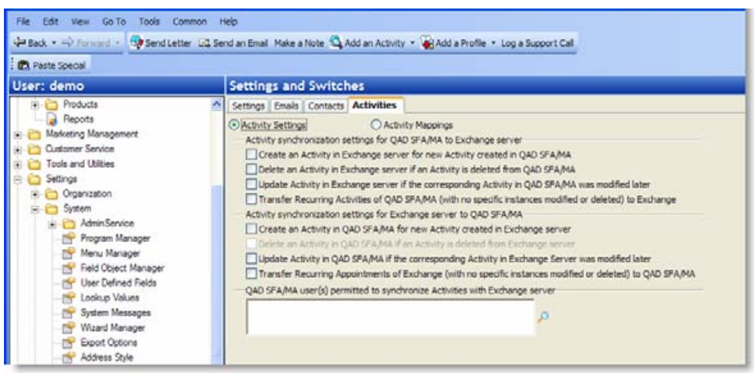


Fig. 14.12
Settings and Switches - Activities Tab

3 Select Activity Settings, if this option is not selected.

4 To enable activity synchronization from the system to Microsoft Exchange Server 2003, select the required options in this area:

Activity synchronization settings for QAD CRM to Exchange Server.

Available options are:

- Create an Activity in Exchange Server for new Activity created in QAD CRM.
- Delete an Activity in Exchange Server if an Activity is deleted from QAD CRM.
- Update Activity in Exchange Server if the corresponding Activity in QAD CRM was modified later.

5 To enable activity synchronization from Microsoft Exchange Server 2003 to the system, select the required options in this area:

Activity synchronization settings for Exchange Server to QAD CRM.

The available options are:

- Create an Activity in QAD CRM for new Activity created in Exchange Server.
- Update Activity in QAD CRM if the corresponding Activity in Exchange Server was modified later.
- Select the QAD CRM users that are permitted to synchronize Activities with the Microsoft Exchange Server.

6 Click Save.

Mapping Activity Types

You can map QAD CRM activity types Letter, Appointment, and Telephone to Microsoft Outlook appointments. You can map QAD CRM tasks to Microsoft Outlook tasks.

To map system activity types to Microsoft Exchange Server 2003 activity types:

1 Choose Main Menu|Settings|Mail Server Integration|Settings and Switches.

2 Click the Activities tab.

3 Select Activity Mappings.

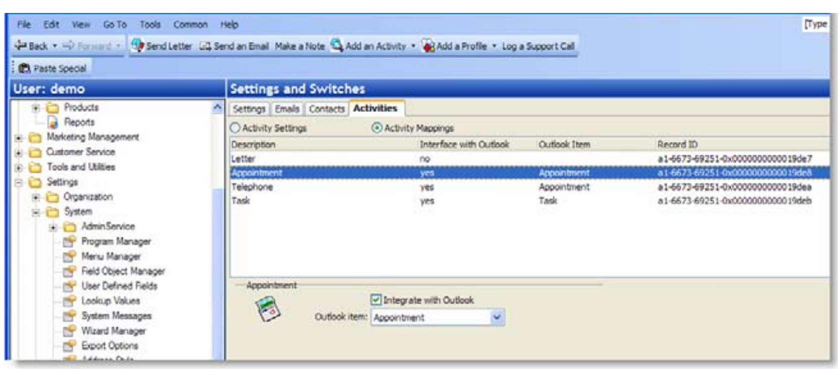


Fig. 14.13 Settings and Switches - Activity Mappings

4 Select the system activity type you want to map to Microsoft Exchange Server activity type.

5 Select the Interface with Outlook check box.

6 From the Outlook Item drop-down list, select the Microsoft Exchange Server activity type to which you want to map the selected activity type.

7 Repeat steps 4–6 to map other activity types to Exchange Server activity types.

8 Click Save.

Note Appointment and Task are mapped by default and cannot be changed.

Setting Up Contact Integration

The contact synchronization options that are available depend on the options you select while enabling contact integration.

To set up contact details synchronization from the system:

1 Choose Main Menu|Settings|Mail Server Integration|Settings and Switches.

2 Click the Contacts tab.

Fig. 14.14 Settings and Switches - Contacts Tab

3 To enable contact synchronization from the system to Microsoft Exchange Server, select the required options in this area:

Contact Synchronization settings for QAD CRM to Exchange Server.

Available options are:

- Create Contact in Exchange Server for new Contact created in QAD CRM
- Delete Contact in Exchange Server if Contact is deleted from QAD CRM.
- Update Contact in Exchange Server if the corresponding Contact in QAD CRM was modified later

4. To enable contact synchronization from Exchange Server to the system, select the required options in this area:

   Contact Synchronization settings for Exchange Server to QAD CRM.

   The available options are:

   - Create Contact in QAD CRM for new Contact created in Exchange Server
   - Attach it to the following profile if the company name is left blank in the Exchange Server Contact

     If you select this option, you must enter the profile ID in the input box below this option. During contact synchronization, this profile is attached to the contacts in Exchange Server that have no company reference.
   - Create a new profile if no exact match found for the company name in Exchange Server Contact
   - Update Contact in QAD CRM if the corresponding Contact in Exchange Server was modified later
   - Update Profile address details in QAD CRM if the Company address details modified in Exchange Server Contact

5. To enable certain users to synchronize information from the system, enter their mailboxes in the field under Exchange users permitted to synchronize with Exchange Public Contacts from QAD CRM.

6. Click Save.

Maintaining Public Folders for Contacts

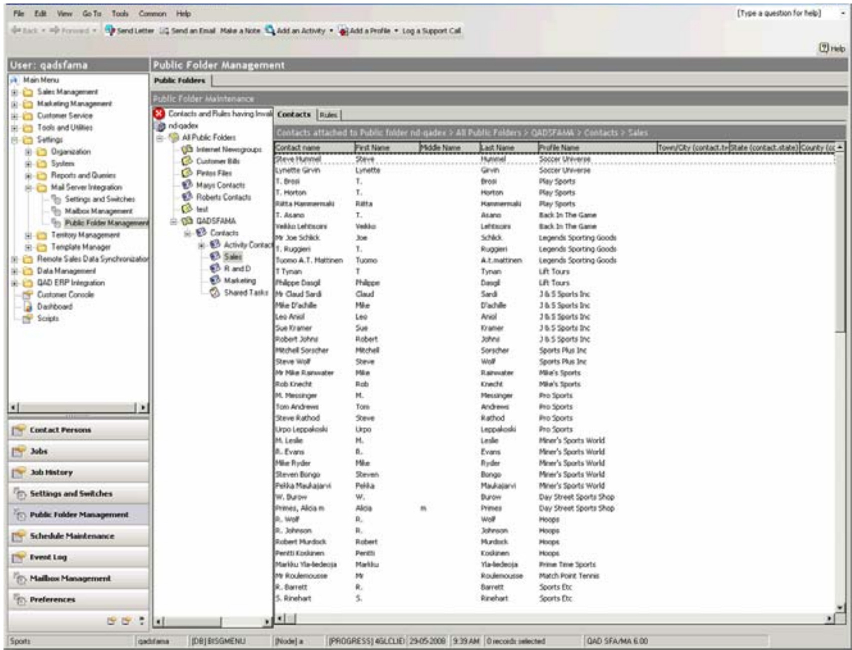
Contacts from QAD CRM are stored in the public folders in Microsoft Exchange Server 2003. The system creates a directory structure under `qadsfama` in the Microsoft Exchange Server 2003 `public` directory. You can create multiple subdirectories under this directory to organize contact records. You can also specify system users who can access contacts stored in these directories, along with their access permissions.

Contact records are automatically transferred to their corresponding directories during synchronization. Records without specific directory reference are not transferred to Microsoft Exchange Server 2003. You can also specify rules for synchronizing contact records. These rules are used to automatically determine the directory to store a new contact record created in the system.

To maintain public folders for contact records and specify user permissions:

1. Choose Main Menu|Settings|Mail Server Integration|Public Folder Management.
2. The system should show all public folders. Click the Public Folders tab if it is not already selected.
3. Open Microsoft Outlook with a profile configured against Microsoft Exchange user `qadsfama`. Make sure a default folder structure is created in Public Folder storage of Exchange Server. The user `qadsfama` should have owner permission for all the public folders.

Fig. 14.15
Public Folder Management



4 To transfer contacts in a logical way, create the public folders in Microsoft Outlook and give the owner permission to user `qadsfama`.

5 To attach contacts to a folder:

a Select the folder and click the Contacts tab.

b Right-click the Contacts screen and choose Attach Contacts.

c From the list, select the contacts and click Attach.

Note To detach a contact, right-click the contact and choose Detach Contacts.

6 To attach rules to a contact directory:

a Select the directory and click the Rules tab.

b Right-click the Rule attached to Public Folder area and choose Add Rule from the right-click menu. The Add Rule Criteria dialog box displays.

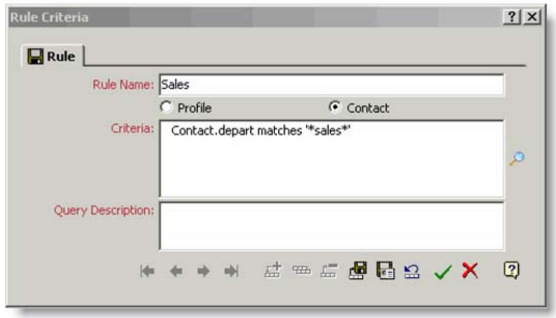


Fig. 14.16
Add Rule Criteria

c In the Rule Name field, type the name of the rule.

d If you want the rule criteria to be based on the contact record, select Contact. If you want the rule criteria to be based on the profile record, select Profile.

e In the Query String field, enter the query for attaching contact records to the selected directory.

f In the Query Description field, type the description of the specified criteria.

g Click Save.

How Contact Synchronization Works

In the system, contacts are associated with profile records. The profile name must match the company field of the contact record of Microsoft Exchange Server 2003.

During contact details exchange between Microsoft Exchange Server 2003 and QAD CRM, QAD AdminService first determines if the company name matches a profile name in the system. If it does, QAD AdminService updates the record.

If QAD AdminService finds multiple profile instances, it composes and delivers an e-mail message with the matching records to the user who created the contact record. The records in this e-mail message are hyper-linked. After receiving a message, the user can click the profile record to use for synchronization.

If QAD AdminService cannot find a profile record that matches the company, it creates an entry in the event log. Users can attach a profile to such contacts from the event log facility of the system.

To attach a profile to a contact from the event log in the system:

1 Choose Main Menu|Tools and Utilities|Event Log.

2 Expand Contact Synchronization.

3 Right-click the event log record and choose Attach.

4 Find and select the profile or add a new profile. Then click OK.

Configuring Microsoft Outlook

To create custom buttons in Microsoft Outlook, do the following on all QAD CRM client computers:

1 Access *QADCRMInstallDir*`/prod/bin` from the client computer.

2 Copy the `sfamaclienttool.exe` executable on the local computer and run it.

Fig. 14.17 ComAddin Installation

3 If the custom component is not already installed, choose Yes to install it.

If the custom Microsoft Outlook component was previously installed, the installation program prompts you to modify or uninstall it. Choose Yes to modify.

Fig. 14.18 ComAddin Installation

4 Select the Apply following settings option.

5 Select the Email, Contact, and Activity options.

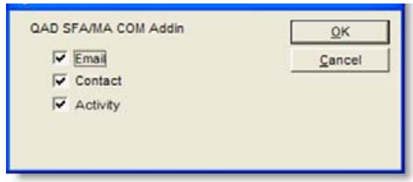


Fig. 14.19
Applying Settings

6 Click OK. The COM Addin installation starts.

7 A message box displays to confirm the installation. Click OK.

Appendix A

Field Mappings

This appendix contains field mappings for the prospect table in QAD Customer Relationship Management (QAD CRM) and corresponding tables in the QAD ERP application.

Prospects

Due to space limitations, this table is presented in two parts. The first part displays the QAD CRM field names, field labels, and field column labels. The second part displays the QAD ERP application field names, field labels, and column labels. Use the number in the Row column to map QAD CRM fields to QAD ERP application fields; for example, the CRM field name `cde` (row 13) maps to the QAD ERP field name `ad_mstr.cm_bill`.

Table A.1
QAD CRM Field Information

Row	Field Name	Field Label	Field Column Label
1	access_list	Access List	Access List
2	acnt_mngr	Ext A/C Mgr	Ext A/C Mgr
3	addr_id	Addr No	Addr No
4	adres[1]	Address[1]	Address[1]
5	adres[2]	Address[2]	Address[2]
6	adres[3]	Address[3]	Address[3]
7	alias_name	Alias name	Alias Name
8			
9	auth	Unit ID	Unit ID
10	auto_rep_alloc	Auto Allocate A/C Manager	Auto Allocate A/C Manager
11	bill_to	Bill to	Bill To
12	call_priority	Call priority	Call Priority
13	cde	Post Code	Post Code
14	created_by	Created By	Created By
15	create_date	Create Date	Create Date
16	create_time	Create time	Create time
17	credit_hold	Credit Hold	Credit Hold
18	cred_limit	Cr Limit	Cr Limit
19	ctry	Country	Country
20	cty	County	County
21	curr_code	Currency	Cur
22			
23	cust_no	Cust. No	Cust. No
24			

Row	Field Name	Field Label	Field Column Label
25			
26	email_id	Email Id	Email Id
27	esc_code	Escalation code	Escalation Code
28	esc_seq	Escalation sequence	Escalation Sequence
29	established_date	Established date	Established date
30	fax	Fax No	Fax No
31	grp	Group	Group
32	grp_sub	Sub Group	Sub Group
33	industry	Industry	Industry
34	inside_rep	Int A/C Mgr	Int A/C Mgr
35	integration_type	Integration Type	Integration Type
36	modified_by	Modified By	Modified By
37	modified_on	Last Modified	Last Modified
38	modified_time	Last Mod time	Last Mod time
39	nme	Profile Name	Profile Name
40	num_empl	Employees	Employees
41	owner	Owner	Owner
42	payment_terms	Payment Terms	Payment Terms
43	price_list	Price List	Price List
44	pse_char1	n/a	n/a
45	pse_char2	n/a	n/a
46	pse_char3	n/a	n/a
47	pse_char4	n/a	n/a
48	pse_char5	n/a	n/a
49	pse_date1	n/a	n/a
50	pse_date2	n/a	n/a
51	pse_dec1	n/a	n/a
52	pse_dec2	n/a	n/a
53	pse_log1	n/a	n/a
54	pse_log2	n/a	n/a
55	rating	Life time rating	Life Time Rating
56	record_id	Record ID	Record ID
57	reg	Region	Region

Row	Field Name	Field Label	Field Column Label
58	sht	Profile ID	Profile ID
59	sic_code	SIC Code	SIC Code
60	source	Source	Source
61	state	State	State
62	tax_no	Registration number	Registration Number
63	tel[1]	Tel No[1]	Tel No[1]
64	tel[2]	Tel No[2]	Tel No[2]
65	tel[3]	Tel No[3]	Tel No[3]
66	turnover	Company size	Company Size
67	twn	Town/City	Town/City
68	txt	Remarks	Remarks
69	type	Type	Profile Type
70	tzone_code	Time zone	Time Zone
71	udf_char01	Credit Rating	Credit Rating
72	udf_char02	Terms	Terms
73	udf_char03	DB Number	DB Number
74	udf_char04	Site	Site
75	udf_char05	Stmt Cyle	Stmt Cyle
76	udf_char06	Terms	Terms
77	udf_char07	Char value7	Char value7
78	udf_char08	Char value8	Char value8
79	udf_char09	Char value9	Char value9
80	udf_char10	Char value10	Char value10
81	udf_char11	Char value11	Char value11
82	udf_char12	Char value12	Char value12
83	udf_char13	Char value13	Char value13
84	udf_char14	Char value14	Char value14
85	udf_char15	Char value15	Char value15
86	udf_char16	Char value16	Char value16
87	udf_char17	Char value17	Char value17
88	udf_char18	Char value18	Char value18
89	udf_char19	Char value19	Char value19
90	udf_char20	Char value20	Char value20

Row	Field Name	Field Label	Field Column Label
91	udf_char21	Char value21	Char value21
92	udf_char22	Char value22	Char value22
93	udf_char23	Char value23	Char value23
94	udf_char24	Char value24	Char value24
95	udf_char25	Char value25	Char value25
96	udf_char26	Char value26	Char value26
97	udf_char27	Char value27	Char value27
98	udf_char28	Char value28	Char value28
99	udf_char29	Char value29	Char value29
100	udf_char30	Char value30	Char value30
101	udf_char31	Char value31	Char value31
102	udf_char32	Char value32	Char value32
103	udf_char33	Char value33	Char value33
104	udf_char34	Char value34	Char value34
105	udf_char35	Char value35	Char value35
106	udf_char36	Char value36	Char value36
107	udf_char37	Char value37	Char value37
108	udf_char38	Char value38	Char value38
109	udf_char39	Char value39	Char value39
110	udf_char40	Char value40	Char value40
111	udf_char41	Char value41	Char value41
112	udf_char42	Char value42	Char value42
113	udf_char43	Char value43	Char value43
114	udf_char44	Char value44	Char value44
115	udf_char45	Char value45	Char value45
116	udf_char46	Char value46	Char value46
117	udf_char47	Char value47	Char value47
118	udf_char48	Char value48	Char value48
119	udf_char49	Char value49	Char value49
120	udf_char50	Char value50	Char value50
121	udf_date01	Last Credit Review	Last Credit Review
122	udf_date02	Last Credit Updated	Last Credit Updated
123	udf_date03	Date value3	Date value3

Row	Field Name	Field Label	Field Column Label
124	udf_date04	Date value4	Date value4
125	udf_date05	Date value5	Date value5
126	udf_date06	Date value6	Date value6
127	udf_date07	Date value7	Date value7
128	udf_date08	Date value8	Date value8
129	udf_date09	Date value9	Date value9
130	udf_date10	Date value10	Date value10
131	udf_date11	Date value11	Date value11
132	udf_date12	Date value12	Date value12
133	udf_date13	Date value13	Date value13
134	udf_date14	Date value14	Date value14
135	udf_date15	Date value15	Date value15
136	udf_dec01	Disc%	Disc%
137	udf_dec02	Disc%	Disc%
138	udf_dec03	Disc%	Disc%
139	udf_dec04	Dec value4	Dec value4
140	udf_dec05	Dec value5	Dec value5
141	udf_dec06	Dec value6	Dec value6
142	udf_dec07	Dec value7	Dec value7
143	udf_dec08	Dec value8	Dec value8
144	udf_dec09	Dec value9	Dec value9
145	udf_dec10	Dec value10	Dec value10
146	udf_dec11	Dec value11	Dec value11
147	udf_dec12	Dec value12	Dec value12
148	udf_dec13	Dec value13	Dec value13
149	udf_dec14	Dec value14	Dec value14
150	udf_dec15	Dec value15	Dec value15
151	udf_dec16	Dec value16	Dec value16
152	udf_dec17	Dec value17	Dec value17
153	udf_dec18	Dec value18	Dec value18
154	udf_dec19	Dec value19	Dec value19
155	udf_dec20	Dec value20	Dec value20
156	udf_log01	Dun Letter	Dun Letter

Row	Field Name	Field Label	Field Column Label
157	udf_log02	Finance Chg	Finance Chg
158	udf_log03	PO Required	PO Required
159	udf_log04	Statement	Statement
160	udf_log05	Payment Hold	Payment Hold
161	udf_log06	PO Required	PO Required
162	udf_log07	Log value7	Log value7
163	udf_log08	Log value8	Log value8
164	udf_log09	Log value9	Log value9
165	udf_log10	Log value10	Log value10
166	udf_log11	Log value11	Log value11
167	udf_log12	Log value12	Log value12
168	udf_log13	Log value13	Log value13
169	udf_log14	Log value14	Log value14
170	udf_log15	Log value15	Log value15
171	usr_char1	n/a	n/a
172	usr_char2	n/a	n/a
173	usr_date1	n/a	n/a
174	usr_date2	n/a	n/a
175	usr_dec1	n/a	n/a
176	usr_dec2	n/a	n/a
177	usr_log1	n/a	n/a
178	usr_log2	n/a	n/a
179	web_adres	Web Address	Web Address
180	who_can_access	Who can access	Who can access

Table A.2
QAD ERP Application Field Information

Row	Field Name	Field Label	Field Column Label
1	n/a		
2	If available users then cm_slspsn	Salesperson	Salespsn
3	n/a		
4	ad_mstr.ad_line1	Address	
5	ad_mstr.ad_line2	Address	
6	ad_mstr.ad_line3	Address	

Row	Field Name	Field Label	Field Column Label
7	cm_mstr.cm_sort	Sort Name	
8	vd_mstr.vd_sort	Sort Name	
9	n/a		
10	n/a		
11	cm_mstr.cm_bill	Bill-To	
12	n/a		
13	ad_mstr.ad_zip	Post	
14	n/a		
15	n/a		
16	n/a		
17	n/a		
18	cm_mstr.cm_cr_limit	Credit Limit	Cr Limit
19	ad_mstr.ad_ctry	Country Code	Ctry
20	(if avail code_mstr then code_cmmt else ad_mstr.ad_county)	County	
21	cm_mstr.cm_curr	Currency	Cur
22	vd_mstr.vd_curr	Currency	Cur
23	cm_mstr.cm_addr	Customer	
24	vd_mstr.vd_addr	Supplier	
25	eu_mstr.eu_addr	End User	
26	n/a		
27	n/a		
28	n/a		
29	n/a		
30	ad_mstr.ad_fax	Fax/Telex	
31	n/a		
32	n/a		
33	n/a		
34	n/a		
35	n/a		
36	n/a		
37	n/a		
38	n/a		

Row	Field Name	Field Label	Field Column Label
39	ad_mstr.ad_name	Name	
40	n/a		
41	n/a		
42	n/a		
43	n/a		
44	n/a		
45	n/a		
46	n/a		
47	n/a		
48	n/a		
49	n/a		
50	n/a		
51	n/a		
52	n/a		
53	n/a		
54	n/a		
55	n/a		
56	n/a		
57	cm_mstr.cm_region	Region	
58	n/a		
59	n/a		
60	n/a		
61	ad_mstr.ad_state	State	St
62	n/a		
63	ad_mstr.ad_phone + (if ad_mstr.ad_ext <> "" then (" x ":U + ad_mstr.ad_ext) else "")	Telephone + Ext	
64	ad_mstr.ad_phone2 + (if ad_mstr.ad_ext2 <> "" then (" x ":U + ad_mstr.ad_ext2) else "")	Telephone + Ext	
65	n/a		
66	n/a		
67	ad_mstr.ad_city	City	

Row	Field Name	Field Label	Field Column Label
68	n/a		
69	n/a		
70	ad_mstr.ad_timezone	Time Zone	
71	cm_mstr.cm_cr_rating	Credit Rating	Cr Rate
72	cm_mstr.cm_cr_terms	Terms	
73	cm_mstr.cm_db	DB Number	
74	cm_mstr.cm_site	Site	
75	cm_mstr.cm_stmt_cyc	Stmt Cycle	Cycle
76	vd_mstr.vd_cr_terms	Cr Terms	
77	n/a		
78	n/a		
79	n/a		
80	n/a		
81	n/a		
82	n/a		
83	n/a		
84	n/a		
85	n/a		
86	n/a		
87	n/a		
88	n/a		
89	n/a		
90	n/a		
91	n/a		
92	n/a		
93	n/a		
94	n/a		
95			
96			
97			
98			
99			
100			

Row	Field Name	Field Label	Field Column Label
101			
102			
103			
104			
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107			
108			
109			
110			
111			
112			
113			
114			
115			
116			
117			
118			
119			
120			
121	cm_mstr.cm_cr_review	Last Credit Review	Cr Limit Review
122	cm_mstr.cm_cr_update	Last Credit Update	Cr Limit Update
123			
124			
125			
126			
127			
128			
129			
130			
131			
132			
133			

Row	Field Name	Field Label	Field Column Label
134			
135			
136	cm_mstr.cm_disc_pct	Disc %	
137	vd_mstr.vd_disc_pct	Disc %	
138	eu_mstr.eu_disc_pct	Disc %	
139			
140			
141			
142			
143			
144			
145			
146			
147			
148			
149			
150			
151			
152			
153			
154			
155			
156	cm_mstr.cm_dun	Dun Letter	Dun
157	cm_mstr.cm_fin	Finance Chg	Fin
158	cm_mstr.cm_po_reqd	PO Required	PO Reqd
159	cm_mstr.cm_stmt	Statement	Stmt
160	vd_mstr.vd_hold	Payment Hold	Hold
161	eu_mstr.eu_po_reqd	PO Required	
162			
163			
164			
165			
166			

Row	Field Name	Field Label	Field Column Label
167			
168			
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