

Industry-specific

QAD SOLUTIONS

Manufacturing Applications

Administration Guide QAD Customer Self Service (QAD CSS)

Introduction
Administration
System Control
Language
Messages
Reports
System Registry Fields



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QAD CSS 4.2 or higher
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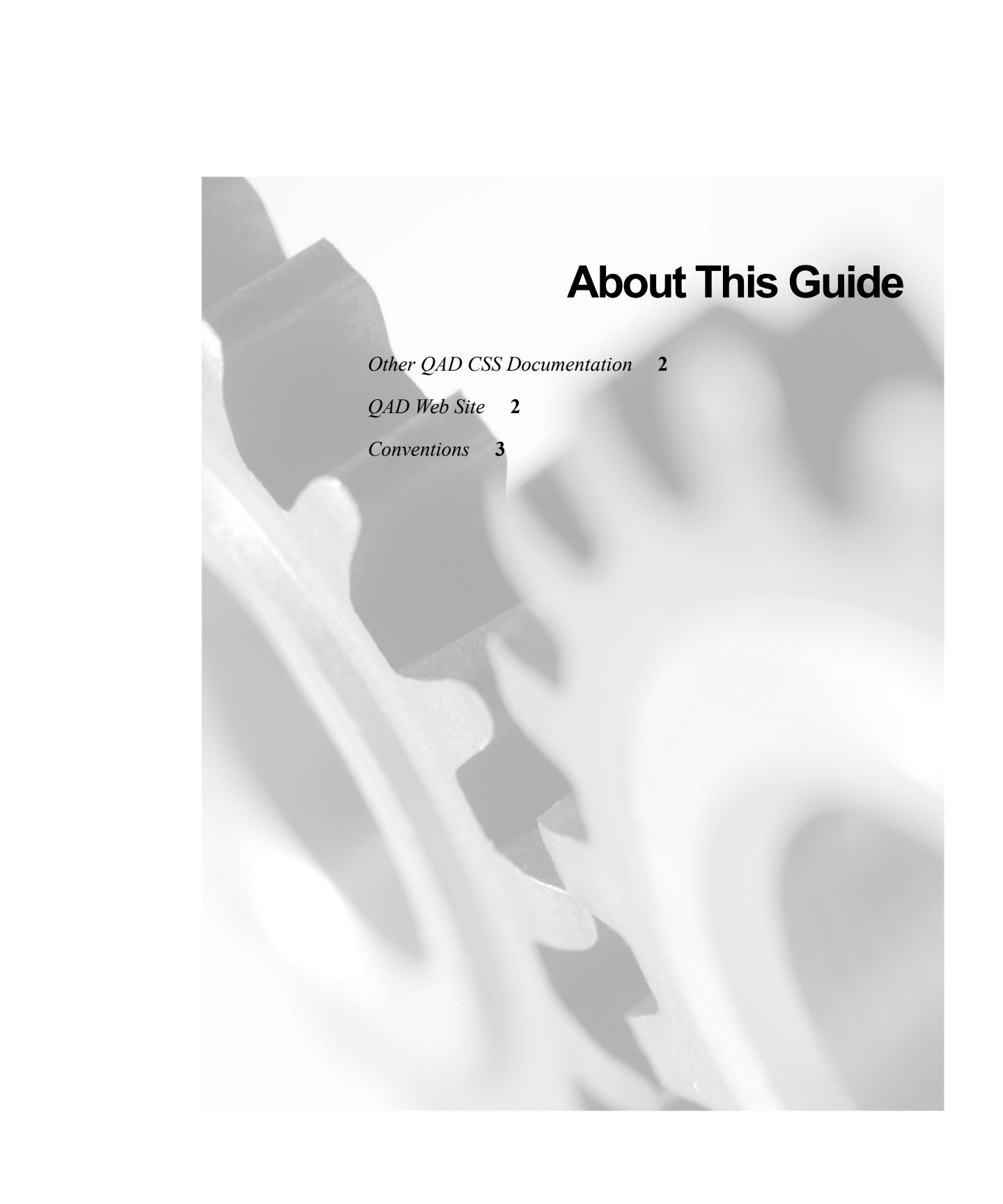
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This guide provides information on each of the administrative functions available for managing a Web order-entry system with QAD CSS.

Other QAD CSS Documentation

For details on how to install QAD CSS on Windows and UNIX systems, see *Installation Guide: QAD Customer Self Service*.

For information useful during the initial setup of a QAD CSS Web site, see *Implementation Guide: QAD Customer Self Service*. This guide includes details on planning an implementation, using load functions to add data about your MFG/PRO items and customers to QAD CSS, customizing the UI, managing the order-creation process, and other setup tasks.

See the QAD Web site for information about the documentation that exists for MFG/PRO.

To view documents online in PDF format, see the *Documents on CD* and *Supplemental Documents on CD*. The CD-ROM media includes complete instructions for loading the documents on a Windows network server and making them accessible to client computers.

Note The QAD CSS installation guide is not included on a CD. A printed copy is packaged with your software. The latest version is also available on the QAD Web site.

QAD Web Site

The QAD 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 QAD CSS users with a QAD Web account, product documentation is available for viewing or downloading at:

<http://support.qad.com/>

You can register for a QAD Web account by accessing the Web site and clicking the Accounts link at the top of the screen. 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:

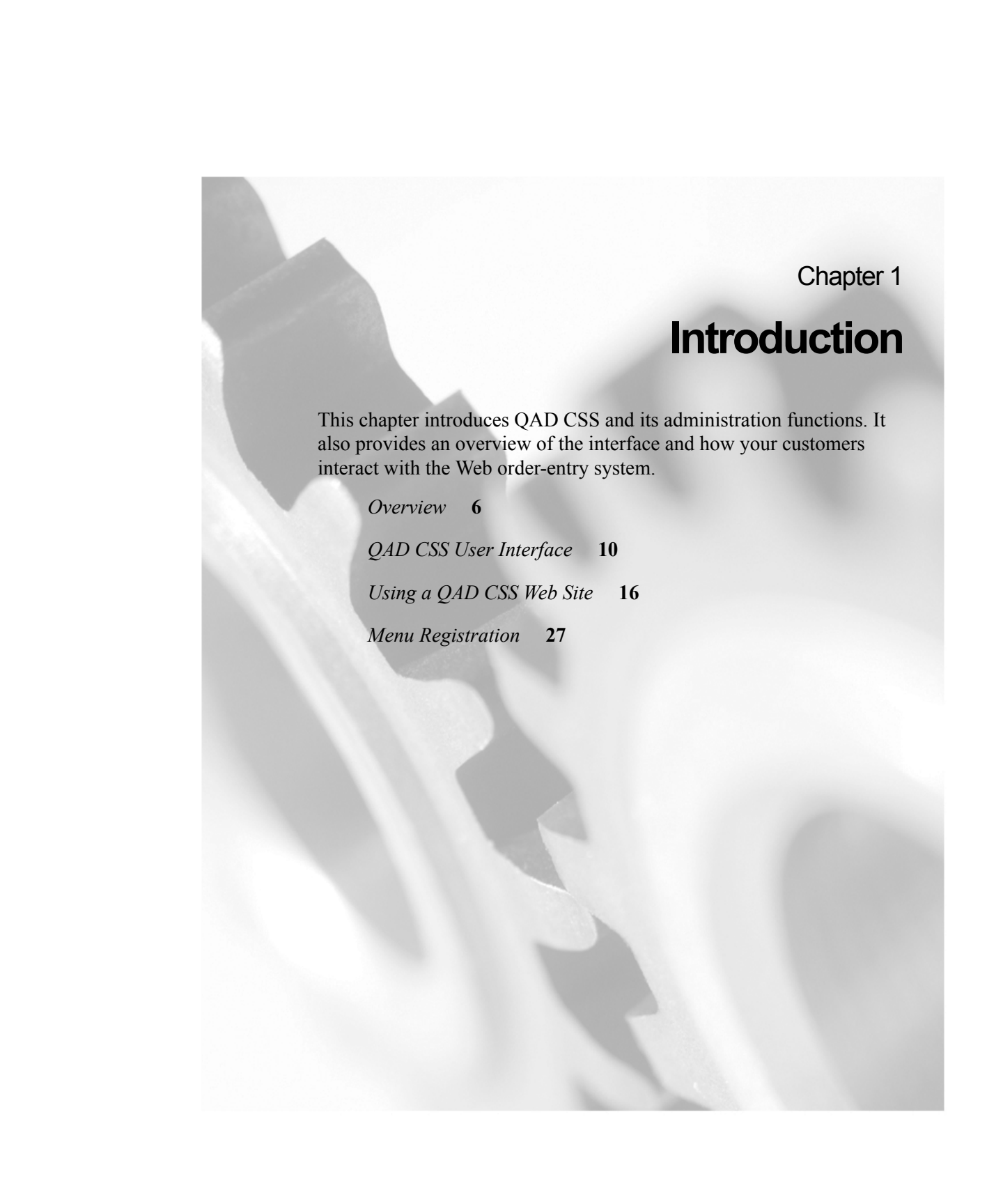
- Portable document format (PDF). PDF files can be downloaded from the QAD Web site to your computer. You can view them with the free Adobe Acrobat Reader. A link for downloading this program is also available on the QAD Web site.
- HTML. You can view user documentation through your Web browser. The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

Features also include an online solution database to help QAD CSS users answer questions about setting up and using the product. Additionally, the QAD Web site has information about training classes and other services that can help you learn about QAD CSS.

Conventions

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.
<i>italicized monospaced text</i>	A variable name for a value you enter as part of an operating system command; for example, <i>YourCDROMDir</i> .
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.

The background of the page is a grayscale image of several interlocking gears. The gears are of different sizes and are positioned in a way that they appear to be meshing together. The lighting creates highlights and shadows on the teeth of the gears, giving them a three-dimensional appearance. The overall tone is technical and industrial.

Chapter 1

Introduction

This chapter introduces QAD CSS and its administration functions. It also provides an overview of the interface and how your customers interact with the Web order-entry system.

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Overview

QAD Customer Self Service (QAD CSS) is a Web-based order-entry application designed to work with QAD's MFG/PRO system. It lets you extend your MFG/PRO system to the Web in support of either business-to-business (B2B) order entry or business-to-customer (B2C) order entry.

With QAD CSS, you can:

- Implement and integrate rapidly, using a cost-effective approach and flexible Web technology.
- Easily model your own business processes without invasive code changes.
- Customize the user interface using Web-standard cascading style sheets.
- Let your customers enter orders with easy-to-use Web browser screens that update MFG/PRO in real time.
- Let your customers check their order status, credit history, and inventory levels.
- Create order templates to simplify and streamline standard order processing.
- Automatically generate e-mails based on rules that you define.

B2B and B2C Implementations

QAD CSS can be used to manage orders in two different business scenarios. The particular scenario you want to support will influence how you set up your system and which functions you use.

- In the business-to-business (B2B) scenario, you sell items through your Web site to established customers that are defined before they access your site. These customers log in to your system and establish their identity. They often buy items on a regular basis, use order templates to facilitate the order-entry process, and pay for items with purchase orders.
- In the business-to-customer (B2C) scenario, you sell items to any shopper that comes to the site and do not require shoppers to identify themselves until they are ready to place an order. These buyers are most likely to pay for items with a credit card.

Using this Guide

This guide should be used in conjunction with *Implementation Guide: QAD Customer Self Service*. The implementation guide provides guidance in planning how you want to set up your Web site and the ways you can use administrative functions to support different approaches to the order-entry process. It also includes details about loading item and customer information from MFG/PRO during initial system setup.

Administration Guide: QAD Customer Self Service provides detailed descriptions of each administrative function provided with the system. You can use it as a reference during implementation and later as a reference for day-to-day administrative activities.

Administrative Functions

QAD CSS administration functions are divided into four categories:

- Administrative functions let you manage information related to users of the system—both internal and external. Most information about customers is obtained from MFG/PRO, so these functions should be used only for temporary changes. Administrative functions also let you control the appearance of the QAD CSS Web order-entry system and the availability of QAD CSS functions when users log in to the site. ▶ See Chapter 2.
- System control functions let you modify aspects of how QAD CSS works and integrates with your system. ▶ See Chapter 3.
- Language functions let you set up information used for non-English installations. You can also use these functions to modify the strings and labels that display in English. ▶ See Chapter 4.
- Message functions let you determine when various messages display as well as the message content. ▶ See Chapter 5.

Administrative functions include the following:

- Address Maintenance
- Carrier href Maintenance
- Contact Maintenance
- Contact Cross-Reference
- Menu Maintenance
- Saved Report Maintenance
- Security Group Maintenance
- Session Maintenance

- Customer Maintenance
- Icon Maintenance
- Item Layout Maintenance
- Item Types Maintenance
- Menu Button Maintenance
- Specials Maintenance
- System Registry
- User Registration
- User Maintenance

Language functions include:

- Currency Unicode
- Data Translation Fields
- Language Control
- String Translation Maintenance

Message functions include:

- E-Mail Master Maintenance
- Error Message Maintenance
- FAQ Category Maintenance
- FAQ Maintenance
- Message Maintenance
- User Message Maintenance

System control functions include:

- Browse Maintenance
- Data Source Maintenance
- Dynamic Temp-Table Maint
- Help Maintenance
- Order Control
- Primary Index
- Super Layer Maintenance
- System Control
- System Module Maintenance
- Customer Load
- Catalog Load
- QAD CSS Clearance Code

Using QAD CSS with MFG/PRO eB2.1

QAD CSS is designed so that a single version of QAD CSS can support multiple versions of MFG/PRO.

Note While QAD CSS can be used with multiple MFG/PRO versions, one instance of QAD CSS can be used with only one version of MFG/PRO at a time. You cannot connect to both MFG/PRO eB2 and eB2.1 databases simultaneously.

The MFG/PRO eB2.1 release introduced a major new concept—domains—into the architecture of the MFG/PRO database. Domains allow companies to centralize operations in fewer databases by using separate, logical partitions in a single database.

Each domain in an MFG/PRO eB2.1 database represents a single business operation with distinct operational requirements and settings. While an MFG/PRO eB2.1 database can have any number of domains, you may want to place orders through QAD CSS that affect only a subset of these domains.

To accommodate the presence of multiple domains in the eB2.1 database, the concept of data sources has been introduced into CSS. The data sources (domains) you want to use in your implementation must be defined in Data Source Maintenance before other records that are domain-specific can be defined.

▶ See “Data Source Maintenance” on page 131

All items and customers in MFG/PRO eB2.1 belong to a specific domain. As a result, all functions that relate to items and customers in QAD CSS require that you specify the associated data source (domain). This includes the functions in the following list.

- Address Maintenance
- Catalog Load
- Contact Cross-Reference Maintenance
- Customer Maintenance
- Customer Load
- Customer Item Maintenance
- Item Types Maintenance
- Special Maintenance
- User Maintenance

Note Users in MFG/PRO are not related to a specific domain. However, in QAD CSS, they are always associated with a customer and customer records are domain-specific. Therefore, in QAD CSS user records are also domain specific.

Each user sees a catalog of items within the context of the domain associated with the customer they specify at log-in. If a user is associated with only one customer, this association occurs automatically.

QAD CSS User Interface

The screens that you use to perform administrative functions share common features. This section describes how you navigate in QAD CSS, common screen components, and how you complete common functions such as deleting records.

Fig. 1.1
Sample
Maintenance
Screen

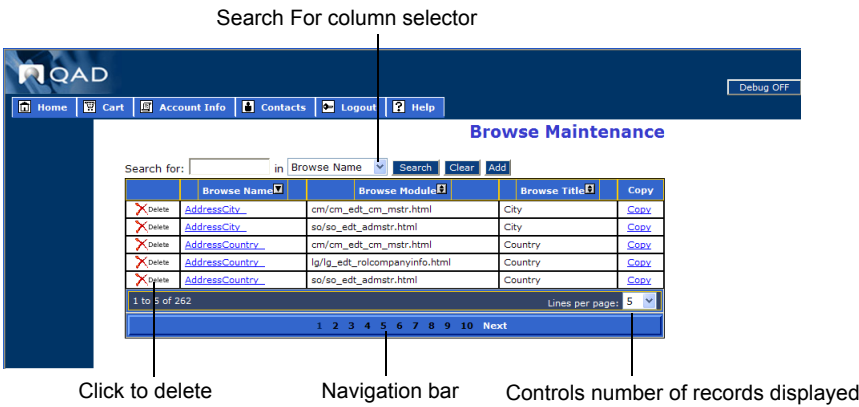


Figure 1.1 illustrates a sample maintenance screen in QAD CSS. Many screens open with the same type of display, which lists all currently defined records that can be maintained by the active function. In Figure 1.1, currently defined browses display.

These types of screens include the following key components:

See “Searching for Entries” on page 14 for details.

Search For. Enter search criteria to limit the results of the search. This component works in conjunction with the next field, the search for column selector.

Search For column selector. This component determines the target browse column for the search. To modify which columns are available for searching requires programmatic customizations.

Search. Click Search to execute the search.

Clear. Click Clear to reset and initialize the search to its initial state.

Add. Click Add button activate the edit window in Add mode. Only one edit window can be open at a time.

Column Sort Identifier. Clicking a searchable column gives that column sort control of the result set. Clicking the same column a second time inverts the sort order.

See “Sorting Entries” on page 15.

Delete Record Link. Clicking the delete link permanently deletes the record of the corresponding row.

See “Deleting an Entry” on page 15.

Edit Record Link. Click a link to an existing record to activate the edit window. Only one edit window can be open at a time. The column you use to edit a record varies between different screens, but is always highlighted as an active link.

Example In Figure 1.1, click Browse Name to edit the code.

Navigation Bar. The QAD CSS navigation bar is a standard screen component used to navigate through a set of records. It controls the display of the number of records in the current result set, determines the number of records per result set, and lets you navigate the result set by page when more than one page of data exists.

Using Edit Screens

Figure 1.2 illustrates a typical edit screen.

User Maintenance

User ID:  Browse icon

User Name: 

Description: 

E-Mail Address: 

Contact Phone Number: Ext:

User Language:

Data Source:

Password:

Confirm Password:

Secret Question:

Secret Answer:

Password Expire Date:

Force password change on next login? ☐

Disable Account? ☐

External Admin? ☐

External Administration

Add / Edit Associations

Save **Delete**

New **Reset**

 Lookup icon

Fig. 1.2
Sample Edit Screen

Lookup and Browse Icons

Some fields in edit screens display associated icons.

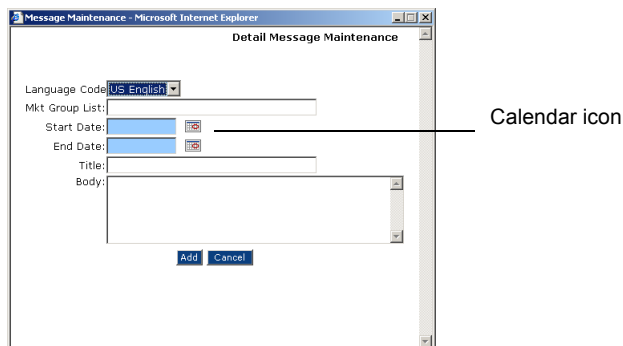
Lookup (magnifying glass icon). Enter a value in the associated field and then click this icon to find the other data associated with the record. For example, enter Bob in the User ID field and click the lookup icon. The system finds the first user record with the string Bob and displays all the related data.

Browse (book icon). Click this icon to display a browse of the data defined for the associated field. All valid records display, and you can select one to use in your current edit session.

Calendar Icons

Figure 1.3 illustrates an edit screen with the calendar icon.

Fig. 1.3
Screen with
Calendar for
Specifying Dates



Calendar icon. Click the calendar icon to display a calendar for selecting days and months, as shown in Figure 1.4.

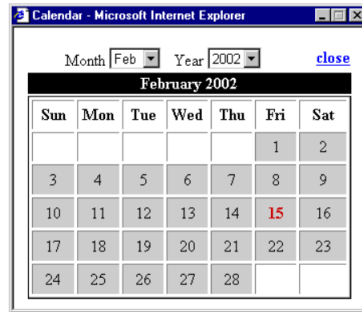
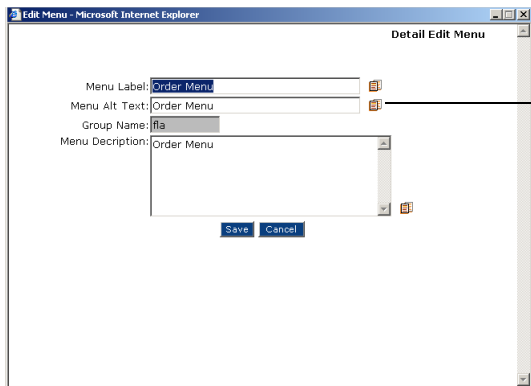


Fig. 1.4
Calendar

Data Translation Icon

If you are using multiple languages, some fields can be translated. An icon displays next to a field that supports this feature when you are logged in using the default language. Data translation icons display only in edit screens for existing records. Figure 1.5 illustrates the translation icon when you are editing a menu label.



Translation icon

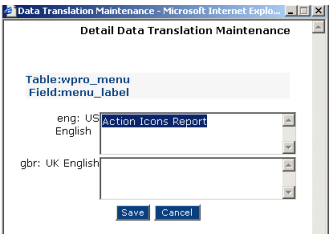
Fig. 1.5
Screen with
Translation Icon

Note You must have a multi-language version of QAD CSS to use the data translation function.

The default language in QAD CSS is initially set to English, but QAD CSS works with any language set as the default. Translation is allowed only from the default language. When a user is logged in using a language other than the default, the translation icon does not display.

Clicking this icon activates a window that allows translation of the corresponding data field.

Fig. 1.6
Detail Data
Translation
Maintenance



Note The languages shown can vary. Only those languages currently installed are available.

Searching for Entries

Maintenance screens let administrators find specific entries using searches. This ability can be applied to search different columns. Search results show only those entries that match the search criteria. This is useful to quickly find a specific set of records among many pages of information.

To search for an entry:

- 1 In the Search For text box, enter part or all of the search criteria.
- 2 In the Search For column selector, select the column to apply the search operation against.
- 3 Click Search to execute the search.

When the search is executed, the criteria entered in the Search For text box are applied to limit the results of the search. The search criteria are applied according to the data type as shown in Table 1.1.

Table 1.1
Search Criteria and
Data Types

Search Type	Data Types
Contains/word index	Character
Equals	Integer, decimal, date, character fields
Begins	Character
Greater than or equal to	Integer, decimal, date, character fields

To cancel a search and reset the results shown in the navigation screen to the initial state, click Clear.

Sorting Entries

You can control the order of the records displayed in navigation screens. Sortable columns are indicated by a double-arrow icon located next to the column label. The active sort column is indicated by either an up or down arrow icon, depending on the current sort order.

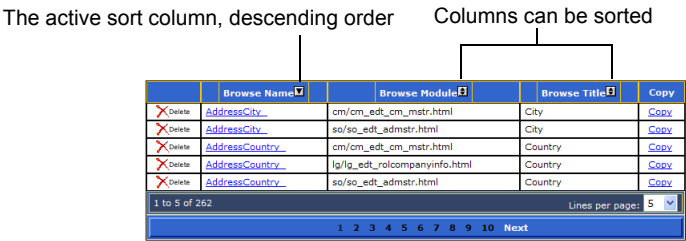


Fig. 1.7
Sorting Columns

When you click a column title, it becomes the active sort column. If the selected column was already the active column, the column sort order is inverted. In this case the arrow direction also changes.

Note Changing the column sort order does not affect the results of the current search results. Searches and sorts are limited to a single active column as displayed in the keyword box and are not combined with previous searches or sorts.

Deleting an Entry

The Delete function lets an administrator permanently delete records.

Important This physically deletes the selected record from the database. There is no undo function to recover deleted records.

Fig. 1.8
Deleting Records

Click here to delete.

	Browse Name	Browse Module	Browse Title	Copy
	AddressCity	cm/cm_edt_cm_mstr.html	City	Copy
	AddressCity	so/so_edt_admstr.html	City	Copy
	AddressCountry	cm/cm_edt_cm_mstr.html	Country	Copy
	AddressCountry	lg/lg_edt_rlocompanyinfo.html	Country	Copy
	AddressCountry	so/so_edt_admstr.html	Country	Copy
1 to 5 of 262				
Lines per page: 5				
1 2 3 4 5 6 7 8 9 10 Next				

To delete a record:

- 1 In a maintenance screen, click the link to the record to be deleted to display the edit screen.
- 2 Print the screen containing the record details. This lets you re-create the record in the future.
- 3 Click Cancel to close the edit screen.
- 4 Click the Delete link in the row of the entry to be deleted.
- 5 Click OK to confirm the deletion of the selected record. To prevent the permanent deletion of the selected record, click Cancel.

Note This action does not physically remove HTML documents, custom programs, JavaScript program files, or icon graphic files from the corresponding QAD CSS directory.

Using a QAD CSS Web Site

♦ See “Detail User Registration Editor” on page 66.

QAD CSS administrators control who can log in to a QAD CSS Web site by enabling or disabling user records. Administrators establish users and set up personal IDs, passwords, contact information, and preferences. Administrators also set up security that controls user access to QAD CSS functions at the site.

Note If you are implementing a B2C Web order-entry system, you probably will not require users to log in, since accounts are typically not created until the user is ready to actually place an order.

See *Implementation Guide: QAD Customer Self Service* for details about setting up and managing B2C and B2B order-entry scenarios.

Figure 1.9 illustrates how the user is prompted during log-in. This page, including the message content, can be customized.

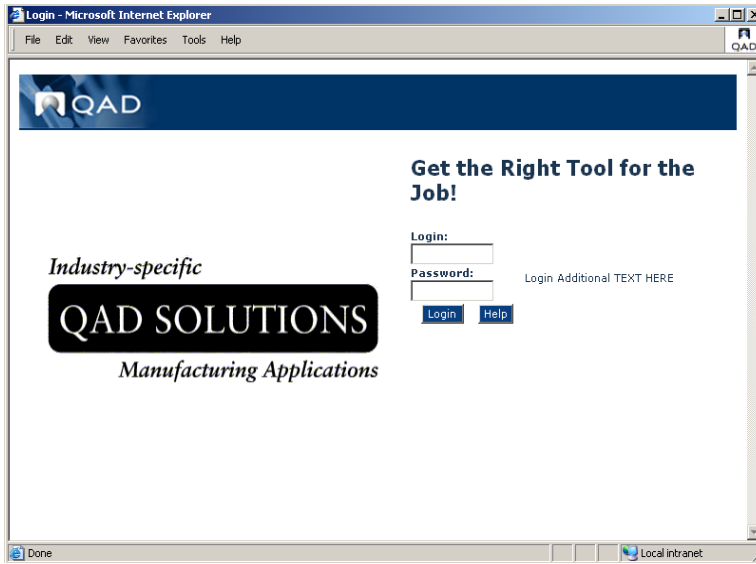


Fig. 1.9
User Log-In

When a user is associated with more than one customer, a customer selection screen displays after the user log-in.

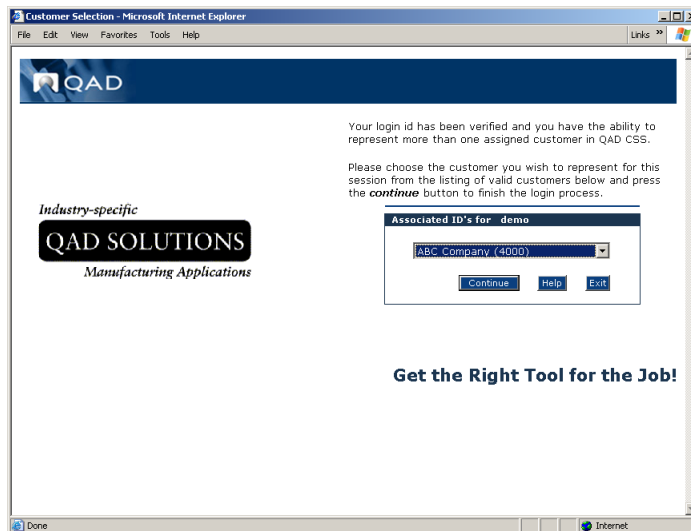


Fig. 1.10
User Log-In with
Customer Selection

♦ See “Customer Selection” on page 25.

The customer selection screen doubles as a transitional welcome page. Both the log-in and this screen can appear completely integrated with a corporate home site.

Note During implementation, you can change the wording on this screen or integrate the sign-in features directly on a corporate home page.

♦ See “Detail User Registration Editor” on page 66.

After logging in, users are taken to their respective home page as defined in User Maintenance.

QAD CSS Home Page

QAD CSS provides multiple administration functions that let you control the appearance of the home page and the availability of QAD CSS functions to internal and external users.

♦ See Appendix A, “System Registry Fields,” on page 259.

Some features of the interface are controlled through system registry settings. These can be customized based on various attributes of the user who is navigating the site. Other features are controlled through various maintenance functions.

♦ See “Security Group Maintenance” on page 58.

The functions displayed on the menu bar and the navigation menu are controlled by security groups. When a function is not assigned to a user’s security group, the menu button or link does not display on their screen.

Users return to the QAD CSS home page by clicking the Home button on the menu bar.

Figure 1.11 illustrates a sample QAD CSS home page.

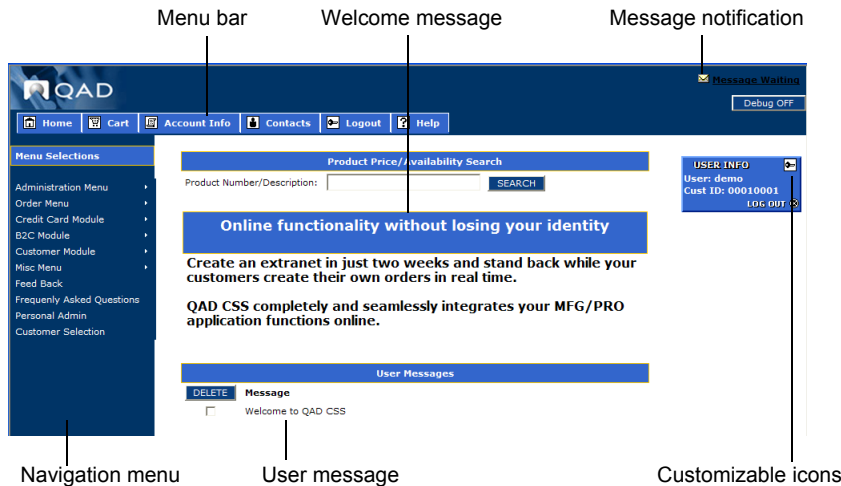


Fig. 1.11
Sample QAD CSS
Home Page

Menu Bar

The QAD CSS menu bar displays at the top of every page. You can set up and configure the appearance and security of the menu bar. The menu options available can be modified, deleted, and reordered.

See “Menu Button Maintenance” on page 92.

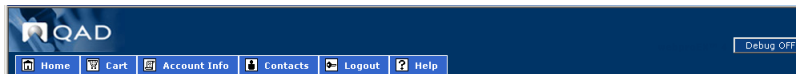


Fig. 1.12
Menu Bar

Clicking a button on the menu bar executes one of the following actions:

Home. Returns the user to their designated home page.

Cart. Displays the contents of the user’s shopping cart.

Account Info. Displays a list of reports available to the user that provide information about their account activity. The same information is available from the Order Menu by clicking the Account Information menu options.

Contacts. Displays your company contact information.

Logout. Ends the current session on the QAD CSS site.

See “Contact Maintenance” on page 39.

▶ See “Help Maintenance” on page 137.

Help. Displays the help topic associated with the current QAD CSS page.

Navigation Menu

▶ See “Menu Maintenance” on page 97.

The QAD CSS navigation menu displays at the left of the home page and provides users with direct links to the different modules and pages allowed by individual permissions. You can edit and configure the menu options on the navigational menu. Unavailable options do not appear to users.

Messages

▶ See Chapter 5, “Messages,” on page 185.

Several functions are used to control messages appearing on QAD CSS pages. A welcome message on the home page can be associated with specific users or groups of users. Messages can also be associated with specific users. User messages can be used to show off a new feature, welcome a new user to the site, advertise specials, or communicate anything else specific to a user.

When certain events occur, automatic e-mail notification can be sent to users, customers, salespeople, administrators, and others. You can set up and configure messages related to those events.

You can also create error messages and determine the way the message is delivered (e-mail, HTML, or log). QAD CSS comes with over a thousand programmed events, most of which do not require user interaction.

Icons

▶ See “Icon Maintenance” on page 79.

QAD CSS provides for the customization of two types of icons. Action icons can be clicked to perform an action such as displaying a detailed description or an image, or to open a PDF file. Information icons provide more information about the corresponding item, such as a picture indicating that an item is new.

Order Entry

The display of available items in the product catalog during order entry is completely customizable. You can set up customers and customer groups and create a general pool of items available for all customers or a specific pool of items for individual customers.

See “Customer Maintenance” on page 47.

Implementation Guide: QAD Customer Self Service provides details about using load functions to set up the catalog and tailor its appearance for different groups of uses.

Figure 1.13 illustrates a sample order-entry screen with product categories and item list.

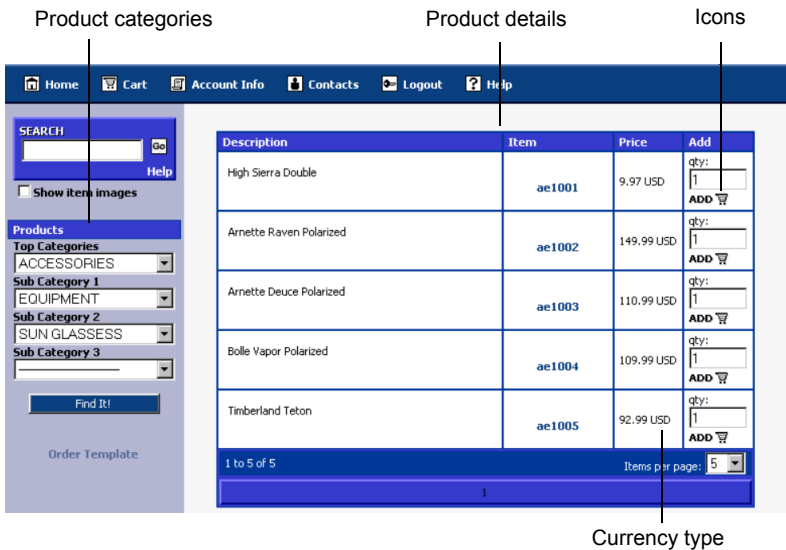


Fig. 1.13
Order Entry

During implementation, you can choose up to three order-entry styles. Many aspects of order entry are managed by settings defined in the system registry. Some are set in additional maintenance programs.

See “System Registry Maintenance” on page 117.

Items can be categorized similar to a traditional sales catalog. Administrators can establish categories of items and their relationships to each other. Item types are categorized into a hierarchical arrangement of categories and subcategories directly related to how items are grouped for sale on the Web site.

See “Item Types Maintenance” on page 87.

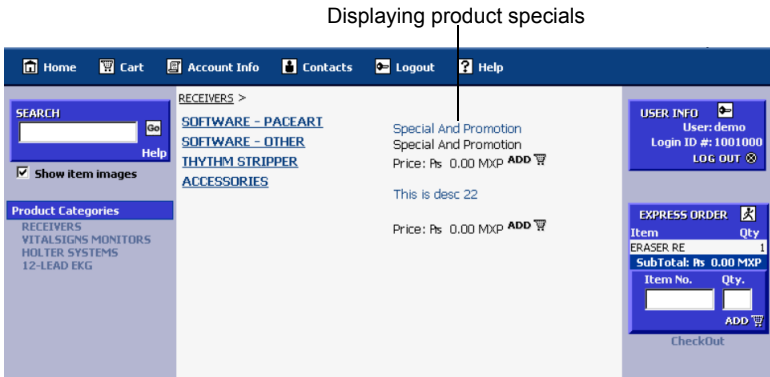
See “Item Layout Maintenance” on page 83.

The display of individual items in the item catalog can also be customized. Various options are provided that control the display of pictures, icons, descriptive text, customer item number, quantity available, pricing, reference, and indexing that appear on item lines.

See “Specials Maintenance” on page 103.

Selected items can be featured to customers when they visit a QAD CSS site. Specials (often referred to as promotions) are groups of items that can be targeted to specific marketing groups or all visitors to the site.

Fig. 1.14
Displaying Specials and Promotions in Order Entry



Specials can be selectively offered to specific marketing groups and have specific start and end dates.

See “Address Maintenance” on page 34.

The customer addresses displayed in order entry typically are stored and updated in MFG/PRO and made available to QAD CSS through using the Customer Load function on the Administration|System Control menu. However, users of QAD CSS can create or modify address records while placing orders. These temporary addresses are typically only needed when you implement a Web order-entry system for B2C processing.

Figure 1.15 illustrates an order ready to be submitted.

Customer address

HomeCartAccount InfoContactsLogoutHelp

NextContinue ShoppingCancel

Finish Order

Order Number: bp000451User ID: demoOrder Date: 02/14/02

Bill-To AddressUpdate

CENTURY HALLMARK 123
ACCOUNTS PAYABLE DEPARTMENT
3020 CENTURY BLVD
P.O. BOX 675
LOS ANGELES, CA 90210
United States of America

Ship-To AddressUpdate

CENTURY HALLMARK 123
ACCOUNTS PAYABLE DEPARTMENT
3020 CENTURY BLVD
P.O. BOX 675
LOS ANGELES, CA 90210
United States of America

Payment Method:Shipping Method:

PO/REF Number (Optional):

Order Comments:

Line	Item Number	Qty	Price	Ext Price
1	efstrapd	1	4.00 USD	4.00 USD
2	cw1001	1	54.99 USD	54.99 USD

Non-Taxable Total: 58.99 USD
Taxable Total: 0.00 USD

Line Total: 58.99 USD
Discount: 0.00 USD
FREIGHT: 0.00 USD
SERVICE: 0.00 USD
SPECIAL: 0.00 USD
Tax: 0.00 USD
ORDER TOTAL: 58.99 USD

Fig. 1.15
Finished Order

Personal Administration

Personal Administration lets users change passwords, secret questions, and e-mail addresses as often as they want. This function of QAD CSS frees administrators from performing tasks for which they are not needed. Additionally, users can take responsibility for themselves in real time. Overall, this prevents duplicate efforts.

Administrators can perform this and other more advanced functions on their own or the user’s behalf in User Maintenance.

The menu location of Personal Administration is Home Menu|Personal Administration. Personal Administration is available to all users.

See “Detail User Registration Editor” on page 66.

Clicking the Personal Administration menu option displays the screen in Figure 1.16. If the user password has expired, Personal Administration may display as the log-in page.

Fig. 1.16
Personal
Administration

Personal Administration does not permit changes to user ID, user name, or the password expiration date. Users are not permitted to view or change sensitive areas of information.

The specific components found on this screen are:

User ID. Unique ID of the user currently logged in.

User Name. Unique name of the user.

Password Expiration Date. Date the current password will expire. The length of time a password is valid is determined in System Control Maintenance.

Enter your old password. Verifies the current user and grants permission to proceed.

Enter your new password. User's new password.

Confirm your new password. Used to check against typographical errors.

Enter your secret question. Used to verify user's identity when they have forgotten their password.

Enter your secret answer. Works in conjunction with Enter your secret question.

Edit your email address if desired. Permits e-mail address updates.

See "System Control Maintenance" on page 152.

Clicking a command button executes one of the following actions:

- Update saves the record to the database. Before saving, all required fields must be populated. The system verifies that the record is unique and compares the password to the existing record. When validated, a record is updated in the database. If validation fails, a message specific to the error is displayed and the record is not updated.
- Cancel returns to the index page without making any changes to the database.

Adding a Personal Administration Entry

See “Detail User Registration Editor” on page 66.

Customer Selection

The Customer Selection page displays based on the sign-in options for individual users defined in User Maintenance. This access screen displays only for users who can sign in as multiple customers. All others are taken directly to a home page.

See “Detail User Registration Editor” on page 66.

Fig. 1.17
Company ID Set
Up in User
Maintenance

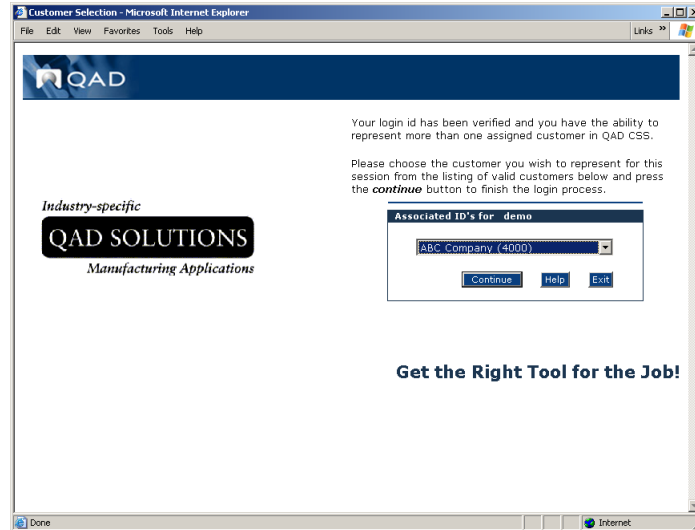
Note In System Registry Maintenance, the registry option *custDisplayLimit* determines how many customers to show in the customer selection drop-down list when a specific user signs in.

See page 283.

The menu location of Customer Selection is Home Menu|Customer Selection. Customer Selection is available only to users associated with more than one customer.

Clicking the Customer Selection menu option displays the screen shown in Figure 1.18.

Fig. 1.18
User Log-In with
Customer Selection



Customer Selection doubles as a transitional welcome page. Both the log-in and this screen can appear completely integrated with a corporate home site.

Note During implementation, you can change the wording or integrate the sign-in features directly on a corporate home page.

The specific components found on this screen are:

Login Type. Choose the type of customer to represent this session; only one is permitted per session.

Note The Login Type radio button displays only when you have customized QAD CSS to include other types of addresses than customers, such as suppliers.

Selection list. This listing is built dynamically based on log-in type.

Continue button. Clicking this button displays the QAD CSS home page associated with the selected customer.

Help button. Click to display a help dialog.

Exit button. Click to return to the log-in screen.

♦ See “Help Maintenance” on page 137 for setup options.

Menu Registration

Table 1.2 lists each function on the QAD CSS home page and the associated program name required to register the function with QAD CSS. You register pages in the menu system using System Module Maintenance.

♦ See “System Module Maintenance” on page 156.

Function Name	Registered Page
Personal Administration	ad/ad_adm_bcuserpersonal.html
Customer Selection	lg/lg_custsel.html

Table 1.2
Home Page
Function
Registration
Programs

Table 1.3 lists each administration function and the associated program name required to register the function with QAD CSS.

Table 1.3
Administration
Function
Registration
Programs

Function Name	Registered Page
Address Maintenance	ad/ad_mnt_addr.html
Carrier href Maintenance	ad/ad_mnt_carrierhref.html
Contact Maintenance	ad/ad_mnt_contact.html
Contact Cross-Reference	ad/ad_mnt_contactxref.html
Customer Maintenance	ad/ad_mnt_cust.html
Customer Item Maintenance	ad/ad_mnt_customeritem.html
Icon Maintenance	ad/ad_mnt_icon.html
Item Layout Maintenance	ad/ad_mnt_itemlayout.html
Item Types Maintenance	ad/ad_mnt_itemtypes.html
Menu Button Maintenance	ad/ad_mnt_menubuttons.html
Menu Maintenance	ad/ad_mnt_menu.html
Saved Report Maintenance	ad/ad_mnt_rptsaved.html
Security Group Maintenance	ad/ad_mnt_securitygroups.html
Session Maintenance	ad/ad_mnt_session.html
Specials Maintenance	ad/ad_mnt_specialmaster.html
System Registry	ad/ad_mnt_registry.html
User Registration	ad/ad_mnt_userregistration.html
User Maintenance	ad/ad_mnt_usermstr.html

Table 1.4 lists each language function and the associated program name required to register the function with QAD CSS.

Table 1.4
Language Function
Registration
Programs

Function Name	Program Name
Currency Unicode	ad/ad_mnt_currencode.html
Data Translation Fields	ad/ad_mnt_transfields.html
Language Control	ad/ad_mnt_langcontrol.html
String Translation Maintenance	ad/ad_mnt_stringtrans.html

Table 1.5 lists each message function and the associated program name required to register the function with QAD CSS.

Function Name	Registered Page
E-Mail Master Maintenance	ad/ad_mnt_memail.html
Error Message Maintenance	ad/ad_mnt_errormsg.html
Error Action Maintenance	ad/ad_mnt_erroraction.html
FAQ Category Maintenance	ad/ad_mnt_faqqategory.html
FAQ Maintenance	ad/ad_mnt_faq.html
Message Maintenance	ad/ad_mnt_infowindowdetail.html
User Message Maintenance	ad/ad_mnt_usermessage.html

Table 1.5
Message Function
Registration
Programs

Table 1.6 lists each system control function and the associated program name required to register the function with QAD CSS.

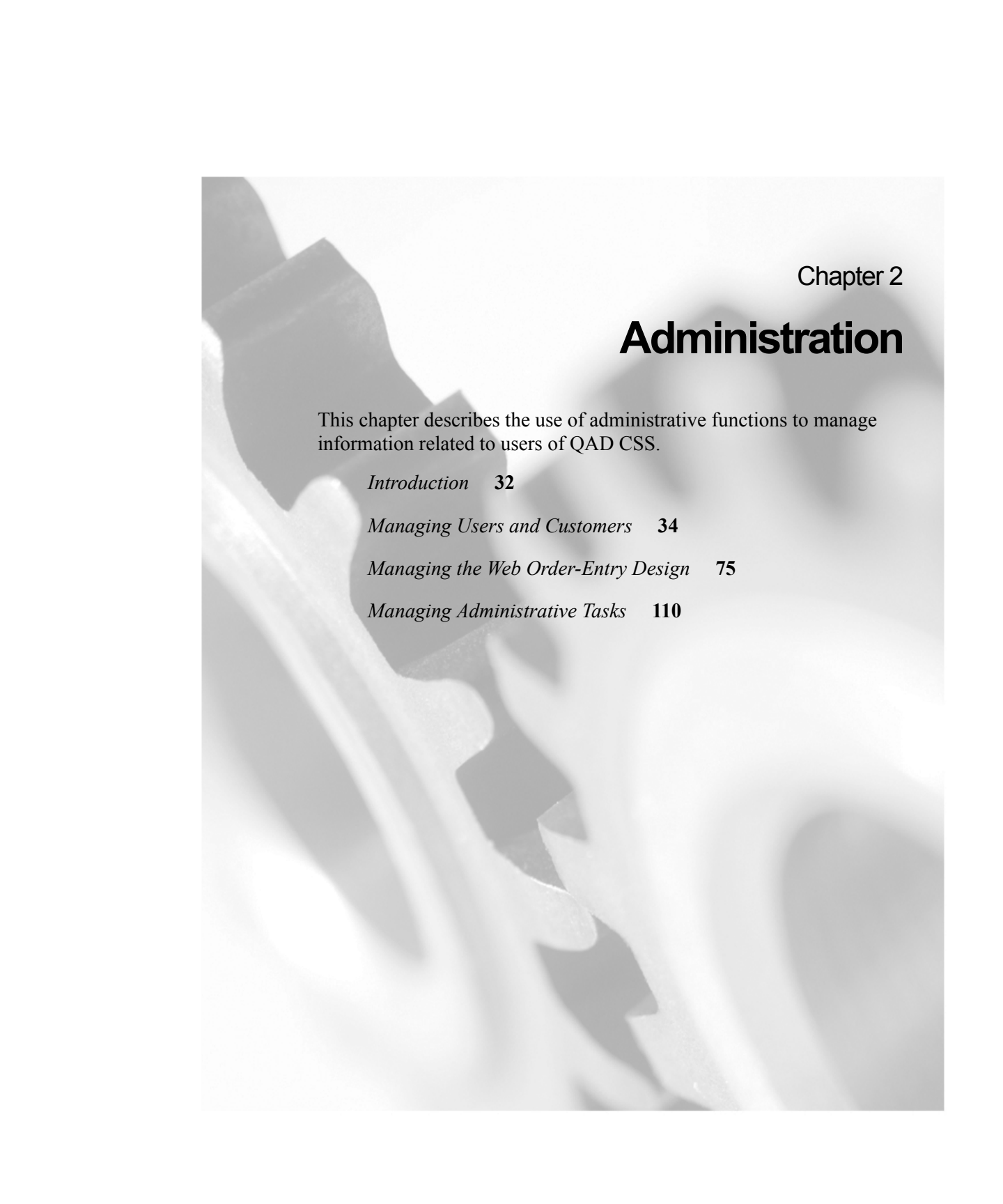
Function Name	Registered Page
Browse Maintenance	ad/ad_mnt_browseostr.html
Data Source Maintenance	ad/ad_mnt_datasource.html
dtmap Maintenance	ad/ad_mnt_dtmap.html
Help Maintenance	ad/ad_mnt_help.html
Order Control	ad/ad_mnt_orderctrl.html
Primary Index	ad/ad_mnt_idx.html
Super Layer Maintenance	ad/ad_mnt_super.html
System Control	ad/ad_mnt_controltable.html
System Module Maintenance	ad/ad_mnt_module.html
JavaScript Maintenance	ad/ad_mnt_JavaScript.html
Customer Load	ad/ad_mnt_customerupload.html
Catalog Load	ad/ad_mnt_itemupload.html
QAD CSS Clearance Code	cl/cl_clearance.html

Table 1.6
System Control
Function
Registration
Programs

Table 1.7 lists each report function and the associated program name required to register the function with QAD CSS.

Table 1.7
Report Menu
Registration
Programs

Function Name	Registered Page
Order Archive Report	orp/orp_rpe_orderarch.html
Uncommitted Orders Report	orp/orp_rpe_orderpurge.html
Unprocessed Orders Report	orp/orp_rpe_unprocorder.html
Action Icon Report	adr/adr_rpe_icons.html
Browse Master Report	adr/adr_rpe_browseostr.html
Customer Master Report	adr/adr_rpe_cust.html
Data Translation Report	adr/adr_rpe_datatrans.html
Documentation Master	adr/adr_rpe_doc.html
E-Mail Address Report	adr/adr_rpe_email.html
E-Mail Event Journal Report	adr/adr_rpe_emevjjournal.html
Error Message Report	adr/adr_rpe_error.html
Item Master Report	adr/adr_rpe_custitem.html
Module Report	adr/adr_rpe_mod.html
System Module Report	adr/adr_rpe_module.html
System Registry Report	adr/adr_rpe_registry.html
Security Group Report	adr/adr_rpe_security.html
Super Layer Report	adr/adr_rpe_super.html
Transaction History Report	adr/adr_rpe_transpurge.html
Module Security	adr/adr_rpe_modsecurity.html
User Master Report	adr/adr_rpe_user.html
Credit Card Transaction Report	adr/adr_rpe_ccpayment.html
Module Hierarchy Report	adr/adr_rpe_module_heirarcy.html

The background of the page is a grayscale image of several interlocking gears. The gears are of different sizes and are positioned in a way that they appear to be meshing together. The lighting creates highlights and shadows on the teeth of the gears, giving them a three-dimensional appearance. The overall tone is technical and industrial.

Chapter 2

Administration

This chapter describes the use of administrative functions to manage information related to users of QAD CSS.

Introduction **32**

Managing Users and Customers **34**

Managing the Web Order-Entry Design **75**

Managing Administrative Tasks **110**

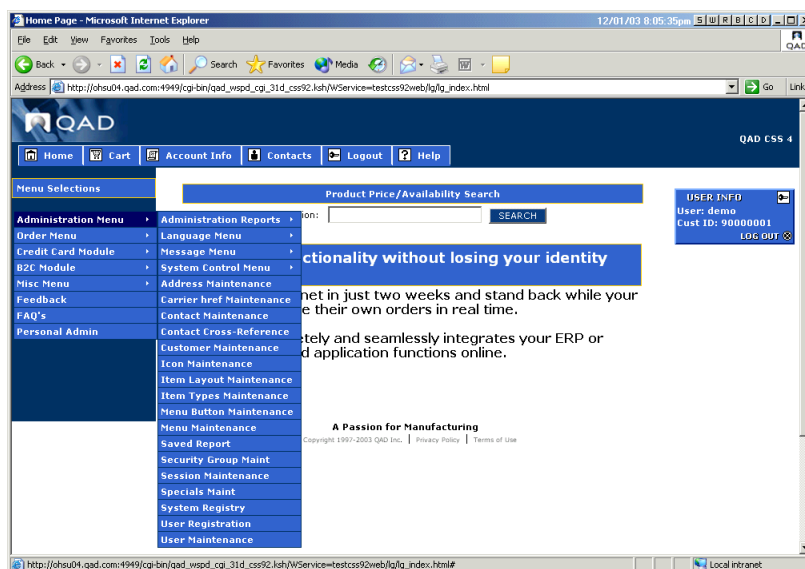
Introduction

Administrative functions let you manage information related to users of the system—both internal and external. Most information about customers is obtained from MFG/PRO, so these functions should be used only for temporary changes.

Administrative functions also let you control the appearance of the QAD CSS Web order-entry system and the availability of QAD CSS functions when users log in to the site.

The menu location for administration functions is Home Menu|Administration Menu.

Fig. 2.1
Administration
Menu



Administrative functions include the following:

- Address Maintenance is used to create, modify, delete, and store temporary addresses before they are committed to MFG/PRO.
- Carrier Href Maintenance associates HTML links with the tracking capabilities of a shipping carrier's Web site.
- Contact Maintenance is used to specify information about the individuals at your company who respond to customer requests.

- Contact Cross-Reference associates contacts at your company with your customers.
- Customer Maintenance overrides and extends MFG/PRO system information related to customers and items.
- Icon Maintenance sets the graphic images used to pass information to the end user through visual cues.
- Item Layout Maintenance maintains predefined registry options that determine which product details appear in the product catalog.
- Item Types Maintenance establishes categories of items and their relationships to each other.
- Menu Button Maintenance is used to set up and configure the QAD CSS menu bar displayed at the top of every page.
- Menu Maintenance is used to edit and configure the QAD CSS navigational menu displayed to the left of the page.
- Saved Report Maintenance saves the search criteria used to generate a report for a specific QAD CSS module.
- Security Group Maintenance defines security groups to which users are assigned, limiting users to specifically defined QAD CSS modules.
- Session Maintenance lets administrators monitor user session records and their related transactions.
- Specials Maintenance controls item promotions offered to customers while they visit a QAD CSS site.
- System Registry establishes how QAD CSS dynamically interprets and processes business rules.
- User Registration notifies administrators when potential customers submit an online request for a user log-in.
- User Maintenance establishes users and creates relationships between QAD CSS and MFG/PRO users.

Administration maintenance functions are available only to users with authority to access these functions.

Note Consider restricting access to authorized administrators or individuals with the specific responsibility for setting up administration options.

♦ See “Menu Maintenance” on page 97 for details on menu setup and security.

Managing Users and Customers

This section describes the administrative functions related to users and customers:

- Address Maintenance
- Contact Maintenance
- Contact Cross-Reference Maintenance
- Customer Maintenance
- Security Group Maintenance
- User Registration
- Detail User Registration Editor

Address Maintenance

Customer addresses are stored and updated in MFG/PRO and made available to QAD CSS using load functions. However, users of QAD CSS can create or modify address records while placing orders. This creates the need to store addresses temporarily outside of MFG/PRO.

Note *Implementation Guide: QAD Customer Self Service* provides details about using load functions to add MFG/PRO customer and item information to your QAD CSS database.

▶ See “Security Group Maintenance” on page 58.

Address Maintenance lets administrators or other users designated by security group view, add, modify, or delete these temporary addresses.

In an MFG/PRO eB2.1 implementation, address records are domain specific. You must indicate which data source (domain) the record is associated with.

Temporary addresses are typically only needed when you implement a Web order-entry system for business-to-customer processing. They may be created for reasons such as the following:

- Business rules are in effect that require temporary storage of the address before posting an order. For example, you want to review addresses to prevent shipment to a P.O. box.

- Orders are not posted directly, requiring address modifications to be stored until the order is released. For example, all orders must be reviewed before committing to MFG/PRO.

Addresses are typically created during the order-entry process and deleted once the order is posted to MFG/PRO.

Important Addresses are deleted immediately when the order is successfully committed to MFG/PRO. This function is not intended for long-term storage or maintenance of address records.

HomeCartAccount InfoContactsLogoutHelp

NextContinue ShoppingCancel

Finish Order

Order Number: bp000451User ID: demoOrder Date: 02/14/02

Bill-To AddressUpdate

CENTURY HALLMARK 123
ACCOUNTS PAYABLE DEPARTMENT
3020 CENTURY BLVD
P.O. BOX 675
LOS ANGELES, CA 90210
United States of America

Ship-To AddressUpdate

CENTURY HALLMARK 123
ACCOUNTS PAYABLE DEPARTMENT
3020 CENTURY BLVD
P.O. BOX 675
LOS ANGELES, CA 90210
United States of America

Payment Method:PO/REF Number:Order Comments:

Shipping Method:

Line	Item Number	Qty	Price	Ext Price
1	efstrapd	1	4.00 USD	4.00 USD
2	cw1001	1	54.99 USD	54.99 USD

Non-Taxable Total: 58.99 USD
Taxable Total: 0.00 USD

Line Total: 58.99 USD
Discount: 0.00 USD
FREIGHT: 0.00 USD
SERVICE: 0.00 USD
SPECIAL: 0.00 USD
Tax: 0.00 USD
ORDER TOTAL: 58.99 USD

Fig. 2.2
Specifying Bill-To
and Ship-To
Addresses During
Order Entry

The menu location of Address Maintenance is Home Menu|Administration Menu|Address Maintenance.

Clicking the Address Maintenance menu option displays the screen in Figure 2.3.

Fig. 2.3
Address
Maintenance

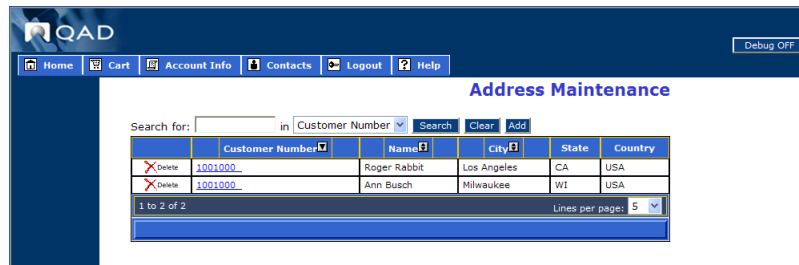


Table 2.1 summarizes the contents of the Address Maintenance navigation screen.

Table 2.1
Address
Maintenance
Navigation

Column	Search	Search Type	Sort	Description	Link
Customer Number	Y	Equals	Y	The unique identifier in both MFG/PRO and QAD CSS. This is an integral link between the two systems.	Y
Name	Y	Begins	Y	Customer name associated with the customer number. It may display or the name may display depending on specific implementation rules.	N
City	Y	Begins	Y	City name of this address record.	N
State	N	n/a	N	State abbreviation code of this address record.	N
Country	N	n/a	N	Country name of this address record.	N

Related QAD CSS functions:

- Order Entry 1
- Order Entry 2
- Order Entry 3, Heads-Down Order (HDO) Entry

Adding an Address Entry

The Add function of Address Maintenance lets an administrator add custom addresses.

The following information is required to complete this process:

- The unique customer number to be applied to this record
- The complete customer address (including postal code and country)
- Tax code, carrier code, and carrier method
- Customer's e-mail address

To create a new entry:

- 1 Click Add in the navigation window to display the edit screen in Add mode.
- 2 Enter data into the appropriate fields.
- 3 Click Add in the edit window to save the record.

The screenshot shows a web browser window titled "Edit Address - Microsoft Internet Explorer". Inside, there's a form titled "Detail Edit Address". The form has several input fields. "Data Source" is a dropdown menu showing "DataSource1". "Customer Number" is a text box with a blue highlight. "Address Number" is a text box with the value "0". Below these are fields for "Address Name", "Address 1", "Address 2", "Address 3", "City", "State", "Country", "Phone Num", "Carrier Code", "Email", "County", "Zip Code", "Tax Code", "Fax Num", and "Carrier Method". At the bottom right of the form are two buttons: "Add" and "Cancel".

Fig. 2.4
Detail Edit Address

Data Source. In an MFG/PRO eB2.1 installation, choose the domain that this address is associated with.

Note This field does not display in MFG/PRO eB2 implementations.

Customer Number. Specify the unique identifier of this customer record in both MFG/PRO and QAD CSS. This is an integral link between the two systems.

Address Number. A unique number used to determine the sort order of multiple addresses associated with the same customer number. Positive and negative integers are allowed. Any address with the same customer number and address number as an existing address record will not be added.

Address Name. An extended address field provided by the user to give a specific meaning to the address; for example, Atlanta Branch Office. The field displays on printed addresses.

Address 1–3. Address line entries.

City. City name of this address record.

State. State abbreviation code of this address record.

Country. Country name of this address record. This field displays a selection list of country codes defined in MFG/PRO.

Phone Num. Complete telephone listing including country and area codes.

Carrier Code. Reference to customer's preferred shipping carrier; for example, UPS or FedEx. If you plan to set up carriers in Carrier Href Maintenance, these should be valid ship via codes defined in MFG/PRO.

E-Mail. E-mail address stored on this address record.

County. County name of this address record.

Zip Code. Zip (postal) code of this address record.

Tax Code. The customer's tax code stored on this address record.

Fax Num. The customer's fax number stored on this address record.

Carrier Method. Relates to customer's carrier code stored on this address record; for example, ship via or freight list. The actual value varies based on how QAD CSS is implemented.

▶ See "Carrier Href Maintenance" on page 75.

Clicking a command button executes one of the following actions:

- Add saves the new record to the database. All required fields—indicated by alternate field color—must be populated prior to saving a record. Before saving, the system verifies that the record is unique and displays an error if it is not.
- Cancel closes the window without adding the record.

Modifying an Address Entry

The Modify function of Address Maintenance lets an administrator modify existing address entries. Requirements for adding a record are the same as for editing a record.

To modify an entry:

- 1 Display the record to modify.
- 2 Click the Customer Number link in the row of the record to be modified. Clicking the link displays the edit screen.
- 3 Enter data into the appropriate fields. Fields that do not allow change are indicated by a second alternate color.
- 4 Click Save to commit the changes.

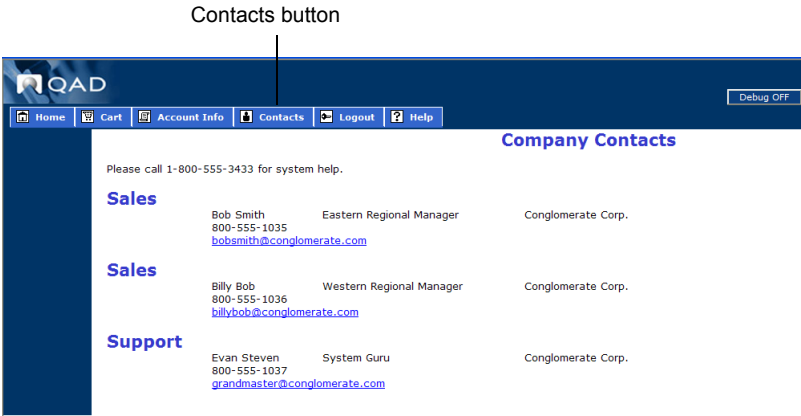
▶ See field descriptions starting on page 37.

Contact Maintenance

Users of QAD CSS have the ability to view company contact information by clicking the Contacts button on the QAD CSS menu bar. The contact lists shown are personalized for each customer. Contact Maintenance lets administrators set up company contacts and cross-reference them to any number of customers so they display in the user's contacts list. Contacts that are not associated with a customer do not display in any contacts list.

You can set up default contacts available to all users of the site, as well as personalized contact lists.

Fig. 2.5
Contacts List



The menu location of Contact Maintenance is Home Menu|
Administration Menu|Contact Maintenance.

Clicking the Contact Maintenance menu option displays the screen in
Figure 2.6.

Fig. 2.6
Contact
Maintenance

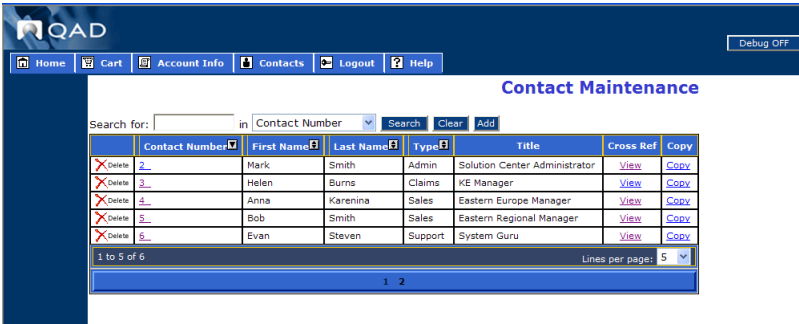


Table 2.2 summarizes the contents of the Contact Maintenance navigation
screen.

Table 2.2
Contact
Maintenance
Navigation

Column	Search	Search Type	Sort	Description	Link
Contact Number	Y	Equal	Y	The unique identifier for a company contact.	Y
First Name	Y	Contains	Y	First name of the company contact.	N
Last Name	Y	Contains	Y	Last name of the company contact.	N

Column	Search	Search Type	Sort	Description	Link
Type	Y	Equal	Y	Unique identifier used to group contacts by type.	N
Title	N	n/a	N	Job title for the company contact.	N
Cross Ref	N	n/a	N	Hyperlink to the Contact Cross-Reference Maintenance function.	Y

Related QAD CSS functions:

- Contact Cross-Reference Maintenance

See page 44.

Adding a Contact Entry

The Add function of Contact Maintenance lets an administrator add details about specific end-user contacts associated with a customer. The following information is required to complete this process:

- The contact name, contact type, e-mail, number, and address to be associated with this record

To create a new entry:

- 1 Click Add in the navigation window to display the edit screen in Add mode.
- 2 Enter data into the appropriate fields.
- 3 Click Add in the edit window to save the record.

The screenshot shows a web browser window titled 'Contact Maintenance - Microsoft Internet Explorer'. The main content area is titled 'Detail Contact Maintenance'. It contains a form with the following fields and values:

- Number: (empty)
- Type: Sales
- First Name: Jane
- Last Name: Doe
- Title: Western Sales Manager
- Company: Conglomerate Inc.
- Phone 1: 805-566-2111
- Phone 2: (empty)
- Fax: (empty)
- E-Mail: jdoe@conglomerat.com
- Image File: (empty)
- Comments: (empty)
- Address Line 1: (empty)
- Address Line 2: (empty)
- Address Line 3: (empty)
- City: (empty)
- State: (empty)
- Zip: (empty)
- Country: (empty)

At the bottom of the form are two buttons: 'Add' and 'Cancel'.

Fig. 2.7
Detail Contact Maintenance

▶ See “Sort Order”
on page 46.

Number. A unique identifier for this contact is assigned automatically by QAD CSS when the record is added to the database.

Type. The contact type used to group contacts in a meaningful way, such as Sales or Support. Contacts are sorted by type in the contacts list.

Note This value is not validated, so make sure you plan your contact types and enter them consistently.

First Name. The contact’s first name.

Last Name. The contact’s last name.

Title. Job title for this contact.

Company. Name of company where this contact works.

Phone 1. Complete telephone listing including country and area codes.

Phone 2. Alternate telephone listing including country and area codes.

Fax. The contact’s fax number.

E-Mail. The preferred e-mail address for this contact. QAD CSS uses this address when sending an associated e-mail event.

Image File. Relative path to an image file for this contact. This image will display next to the contact name when the contact list is displayed.

Comments. Additional information regarding this contact.

Address line 1–3. Address line entries.

City. City name of this address record.

State. State abbreviation code of this address record.

Zip. Zip (postal) code of this address record.

Country. Country name of this address record. This field displays a selection list of country codes defined in MFG/PRO.

Clicking a command button executes one of the following actions:

- Add saves the new record to the database. All required fields—indicated by alternate field color—must be populated prior to saving a record. Before saving, the system verifies that the record is unique and displays an error if it is not.
- Cancel closes the window without adding the record.

Modifying a Contact Entry

The Modify function of Contact Maintenance lets an administrator modify existing address entries. Requirements for adding a record are the same as for editing a record.

To modify an entry:

- 1 Display the record to modify.
- 2 Click the Contact Number link in the row of the record to be modified. Clicking the link displays the edit screen.
- 3 Enter data into the appropriate fields. Fields that do not allow change are indicated by a second alternate color.
- 4 Click Save to commit the changes.

See field descriptions starting on page 37.

Contact Cross-Reference

While in Contact Maintenance, you can click a View link to display cross-references corresponding to the contact row.



Fig. 2.8
Viewing Contact
Cross-References
Through Contact
Maintenance

Clicking a View link in Contact Maintenance displays cross-reference details shown in the screen in Figure 2.9.

Fig. 2.9
Contact
Cross-Reference
Maintenance

The screenshot shows the QAD Contact Cross-reference Maintenance screen. The header includes the QAD logo, navigation links (Home, Cart, Account Info, Contacts, Logout, Help), and a Debug OFF button. The main content area has a search bar and a table with the following data:

	Contact Number	Customer Number	Sort Order
X Delete	5	MTS	A
X Delete	5	00010001	0

At the bottom, it shows "1 to 2 of 2" and "Lines per page: 5".

Note Contact Cross-Reference can also be accessed directly from the Administration menu. See the next section for a description.

Contact Cross-Reference Maintenance

Use Contact Cross-Reference Maintenance to create and maintain associations between customers and contacts on the contact list. Multiple contacts can be associated with a single customer.

The menu location of Contact Cross-Reference is Home Menu|Administration Menu|Contact Cross-Reference.

Note In an MFG/PRO eB2.1 implementation, contact cross-reference records are domain specific. You must indicate which data source (domain) the customers being cross-referenced are associated with.

Clicking the Contact Cross-Reference menu option displays the screen in Figure 2.10.

Fig. 2.10
Contact Cross-
Reference
Maintenance

The screenshot shows the QAD Contact Cross-reference Maintenance screen. The header includes the QAD logo, navigation links (Home, Cart, Account Info, Contacts, Logout, Help), and a Debug OFF button. The main content area has a search bar and a table with the following data:

	Contact Number	Customer Number	Sort Order
X Delete	2	1001000	1

At the bottom, it shows "Lines per page: 5".

Table 2.3 summarizes the contents of the Contact Cross-Reference Maintenance navigation screen.

Column	Search	Search Type	Sort	Description	Link
Contact Number	Y	Equals	Y	The unique identifier for a company contact.	Y
Customer Number	Y	Equals	Y	The unique identifier in both MFG/PRO and QAD CSS. This is an integral link between the two systems.	N
Sort Order	Y	Equals	Y	The alphanumeric value that controls the order in which this company contact displays in the contacts list. Positive and negative numeric values can be used.	N

Table 2.3
Contact Cross-Reference Maintenance Navigation

Related QAD CSS functions:

- Contact Maintenance
- Customer Maintenance

See page 39.

Adding a Contact Cross-Reference Entry

The Add function of Contact Cross-Reference Maintenance lets an administrator create a relationship between a contact number and a customer number.

The following information is required to complete this process:

- The unique contact number to be applied to this record
- The unique customer number to be linked to the contact number

To create a new entry:

- 1 Click Add in the navigation window to display the edit screen in Add mode.
- 2 Enter data into the appropriate fields.
- 3 Click Add in the edit window to save the record.

Fig. 2.11
Detail Contact
Cross-Reference
Maintenance

Contact Number. Unique identifier for a contact.

Data Source. In an MFG/PRO eB2.1 installation, choose the domain that the customer referenced by this contact is associated with.

Note This field does not display in MFG/PRO eB2 implementations.

Customer Number. Unique identifier in both MFG/PRO and QAD CSS for a customer. This is an integral link between the two systems. Enter an asterisk (*) to associate this contact with all customers.

Sort Order. Alphanumeric value that determines the order in which this contact will display in relation to other contacts in the contacts list. Contacts are first sorted by contact type and then by sort order. Enter 0 (zero) to sort this contact by the contact number.

Clicking a command button executes one of the following actions:

- Add saves the new record to the database. All required fields—indicated by alternate field color—must be populated prior to saving a record. Before saving, the system verifies that the record is unique and displays an error if it is not.
- Cancel closes the window without adding the record.

Modifying a Contact Cross-Reference Entry

The Modify function of Contact Cross-Reference Maintenance lets an administrator modify existing cross-reference entries. Requirements for adding a record are the same as for editing a record.

To modify an entry:

- 1 Display the record to modify.
- 2 Click the Contact Number link in the row of the record to be modified. Clicking the link displays the edit screen.
- 3 Enter data into the appropriate fields. Fields that do not allow change are indicated by a second alternate color.
- 4 Click Save to commit the changes.

▶ See field descriptions starting on page 45.

Customer Maintenance

Use Customer Maintenance to override and extend MFG/PRO system information related to customers and items. The recommended practice is to maintain customers and items using the Customer Load function provided with QAD CSS on the Administration|System Control menu. Customer Maintenance lets you manually adjust the results of the load.

In an MFG/PRO eB2.1 implementation, customer records are domain specific. You must indicate which data source (domain) each customer is associated with.

Implementation Guide: QAD Customer Self Service provides details about using load functions to add MFG/PRO customer and item information to your QAD CSS database.

Important Implementation affects both usage and requirements of customer and item information stored in QAD CSS. You should understand this thoroughly before changing any customer or item information.

Some examples of implementing QAD CSS relative to customer maintenance are:

- Create a general pool of items for all customers. In this case, there will be many items and only one customer record. The information stored in the customer record is not used.
- Create a specific pool of items for each customer. In this case, there will be many items and many customer records. The information stored in these customer records can include information not stored in MFG/PRO. It can also override information stored in MFG/PRO.

Many options are possible depending on how you plan to implement and use QAD CSS.

The menu location of Customer Maintenance is Home Menu|Administration Menu|Customer Maintenance.

Clicking the Customer Maintenance menu option displays the screen in Figure 2.12.

Fig. 2.12
Customer
Maintenance

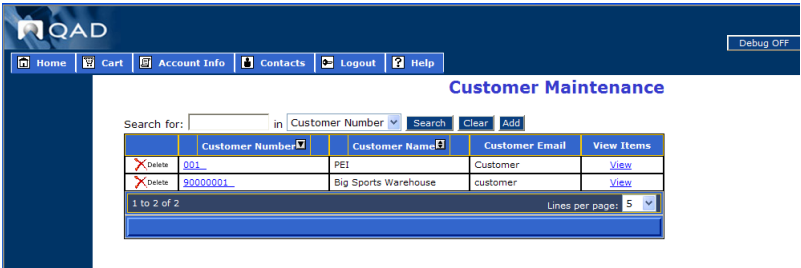


Table 2.4 summarizes the contents of the Customer Maintenance navigation screen.

Table 2.4
Customer Address
Maintenance
Navigation

Column	Search	Search Type	Sort	Description	Link
Customer Number	Y	Exact	Y	The unique identifier in both MFG/PRO and QAD CSS. This is an integral link between the two systems.	Y
Customer Name	Y	Begins	Y	Customer name associated with the customer number. The display may vary depending on specific implementation rules.	N
Customer E-Mail	N	n/a	N	The e-mail address associated with this customer overriding or extending MFG/PRO value.	N
View Items	N	n/a	N	This link displays only items associated with this customer.	Y

Adding a Customer

The Add function of Customer Maintenance lets an administrator add customers. The following information is required to complete this process:

- The unique customer name, e-mail, number, and group to be associated with this record
- The default site from which items are shipped
- The master customer associated with this record

To create a new entry:

- 1 Click Add in the navigation window to display the edit screen in Add mode.
- 2 Enter data into the appropriate fields.
- 3 Click Add in the edit window to save the record.

The screenshot shows a web browser window titled 'Edit Customer - Microsoft Internet Explorer'. The page content is titled 'Detail Edit Customer'. It features a form with the following fields: 'Data Source' (a dropdown menu with 'DataSource1' selected), 'Customer Number', 'Customer Name', 'Customer Group', 'Customer E-Mail', 'Default Site', 'Master Customer', and 'Warehouse List'. Each field has a corresponding input box. At the bottom of the form are two buttons: 'Add' and 'Cancel'.

Fig. 2.13
Detail Edit
Customer

Data Source. In an MFG/PRO eB2.1 installation, choose the domain that this customer is associated with.

Note This field does not display in MFG/PRO eB2 implementations.

Customer Number. The unique identifier in both MFG/PRO and QAD CSS. This is an integral link between the two systems.

Customer Name. Customer name associated with the customer number. The actual display depends on specific implementation rules.

▶ See “System Registry Maintenance” on page 117.

Customer Group. You can use customer group as a key value in the system registry to control the behavior of your Web order-entry system based on customer group membership. Group names are not validated but should be planned and used consistently. The group name can be a maximum of eight characters.

▶ See “E-Mail Master Maintenance” on page 187.

Customer E-Mail. The e-mail address associated with this customer is used by QAD CSS to notify customers based on predefined events that you set up.

Default Site. This value represents the default site for calculating quantity availability in MFG/PRO. MFG/PRO determines a default site in Item Master Maintenance (1.4.1). You can use this field to override the MFG/PRO default with a different value.

▶ See page 272.

See also the effect of the *runGetDefWhseQty* registry setting.

Master Customer. This field stores a reference to one or more QAD CSS customer records; use a comma-separated list for multiple values. The current customer inherits all of the items associated with master customers in addition to items associated with their own customer number.

Browse Icon. This lets you select from a list of all valid QAD CSS customers.

Warehouse List. Specify a comma-separated list of all the sites (warehouses) available for inventory calculations. The order of this list may impact the calculations, depending on implementation.

Note This field is not currently used by the system.

Clicking a command button executes one of the following actions:

- Add saves the new record to the database. All required fields—indicated by alternate field color—must be populated prior to saving a record. Before saving, the system verifies that the record is unique and displays an error if it is not.
- Cancel closes the window without adding the record.

Modifying a Customer Entry

The Modify function of Customer Maintenance lets an administrator modify existing customer entries. Requirements for adding a record are the same as for editing a record.

To modify an entry:

- 1 Display the record to modify.
- 2 Click the Customer Number link in the row of the record to be modified. Clicking the link displays the edit screen.
- 3 Enter data into the appropriate fields. Fields that do not allow change are indicated by a second alternate color.
- 4 Click Save to commit your changes.

▶ See field descriptions starting on page 49.

Customer Item Maintenance

Customer Item Maintenance is an extension of Customer Maintenance. This function lets QAD CSS administrators override and extend MFG/PRO information related to customer items. The recommended practice is to maintain customer items using the Item Load function provided with QAD CSS on the Administration|System Control menu. Customer Item Maintenance lets an administrator manually adjust the results of the load.

Implementation Guide: *QAD Customer Self Service* provides details about using load functions to add MFG/PRO customer and item information to your QAD CSS database.

Important The implementation of QAD CSS affects both the usage and requirements of customer item information stored in QAD CSS. You should thoroughly understand how the order module was implemented before changing any customer item information.

Some examples of implementing QAD CSS relative to customer maintenance are:

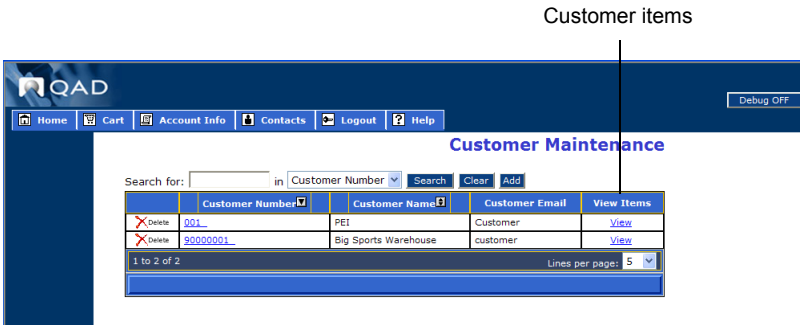
- Create a general pool of items for all customers. In this case, there will be many items and only one customer record. The information stored in the customer record is not used.

- Create a specific pool of items for each customer. In this case, there will be many items and many customer records. The information associated with these customer records can include information not stored in MFG/PRO or override MFG/PRO information.

Many options are possible depending on the specific implementation of QAD CSS.

Customer Item Maintenance is reached from the Customer Maintenance screen by clicking the View link.

Fig. 2.14
Viewing Customer
Items Through
Customer
Maintenance



Clicking a View link in Customer Maintenance displays the screen in Figure 2.15.

Fig. 2.15
Customer Item
Maintenance

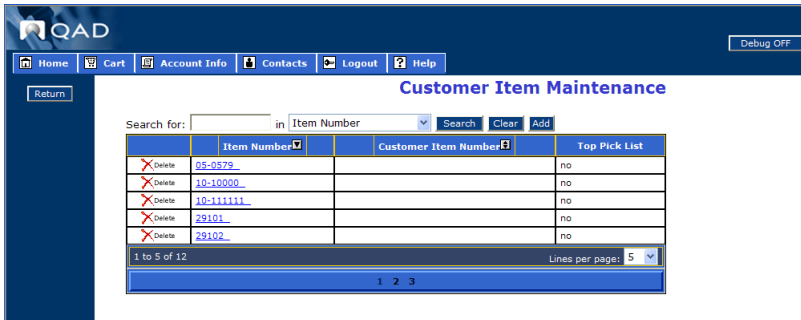


Table 2.5 summarizes the contents of the Customer Item Maintenance navigation screen.

Column	Search	Search Type	Sort	Description	Link
Item Number	Y	Contains	Y	The item number as defined in MFG/PRO. This field provides the link between the QAD CSS item table and the pt_mstr table in MFG/PRO.	Y
Customer Item Number	Y	Contains	Y	The item code the customer uses to cross-reference this item number.	N
Top Pick List	N	n/a	N	Cross item-type categorization of items used to give the customer another way to view a group of items; for example, the top ten items purchased last year. Displays value of Item List field.	N

Table 2.5
Customer Item
Maintenance
Navigation

Adding a Customer Item Entry

The Add function of Customer Item Maintenance lets an administrator add custom customer item records and associate them with specific QAD CSS pages.

Important Customer item records are created and maintained through the Catalog Load function. Changes made here are not permanent.

To create a new entry:

- 1 Click Add in the navigation window to display the edit screen in Add mode.
- 2 Enter data into the appropriate fields.
- 3 Click Add in the edit window to save the record.

Fig. 2.16
Detail Customer
Item Edit

Customer Item Edit - Microsoft Internet Explorer

Detail Customer Item Edit

Data Source: DataSource1
Customer Number: 10000

Item Number:

Item Type:

Search Item: ☐

Item Description 1:

Price:

Detail Image:

Detail Height:

Thumb Image:

Thumb Height:

Pop Image:

Pop Height:

Icon List:

Schematic File:

Language Code:

Min/Max/Mult:

Integers 1-3:

Decimals 1-3:

Characters 1-5:

Other Fields 1-5:

6-10:

11-15:

Codes 0-5:

Customer Part:

Unit of Measure:

Item List:

Description 2:

Euro Dollar:

Alt Text:

Detail Width:

Alt Text:

Thumb Width:

Alt Text:

Pop Width:

PDF File:

Add Cancel

Data Source. In an MFG/PRO eB2.1 installation, the domain that this customer is associated with displays.

Note This field does not display in MFG/PRO eB2 implementations.

Customer Number. Specify the number identifying the customer associated with this item. This must be a valid customer ID in both MFG/PRO and QAD CSS and is an integral link between the two systems.

Item Number. Specify the item number as defined in MFG/PRO. This field provides the link between the QAD CSS item table and the pt_mstr table in MFG/PRO.

Customer Part. Specify the ID that the customer uses to refer to your internal item number.

Item Type. Not currently used.

Unit of Measure. Specify the stocking unit of measure for this item in QAD CSS as defined by MFG/PRO. If left blank, a unit of measure of each is assumed.

Search Item. Select this option to include this item when a keyword search is performed from the order-entry pages.

Item List. Indicate if you want to include this item in a special group, such as the top-ten items purchased last year.

No: No special processing is associated with the item.

Yes: The customer item view can be sorted by this value so that you can see the items with Yes grouped together.

Note This does not currently extend to the catalog view of items.

Item Description 1. Specify the first line of the item description. This information can originate from the MFG/PRO item master table or marketing sales catalog.

Item Description 2. Specify the second line of the item description. This information can originate from the MFG/PRO item master table or marketing sales catalog.

Price. This is the price for this item, for this customer, in the customer's default currency, at the minimum order quantity, when the price is provided from QAD CSS instead of MFG/PRO pricing routines.

See page 272.

Normally, pricing is obtained from MFG/PRO through a pricing API, based on system registry setting *runGetBestPrice*. However, if for some reason a price is not returned from MFG/PRO or the MFG/PRO database is not available, the price stored in this field displays in the product catalog.

Euro Dollar. Specify the price defined in Price converted into the euro monetary unit.

Detail Image. This is the relative path and file name of the item detail image file displayed on the QAD CSS item detail page when system registry setting *itemDetailPgm* is set to display `op_itemdetail.html` for a new HTML page.

See
"itemDetailPgm"
on page 266.

Alt Text. Specify the alternate text displayed in rollovers or when the image cannot be displayed.

Note It is strongly recommended to specify image height and width to optimize the display performance of the Web site in all Web browsers.

Detail Height. Specify the height of the image in pixels.

Detail Width. Specify the width of the image in pixels.

Thumb Image. Specify the relative path and file name of the item detail image file displayed on the catalog page next to the item description when users select the option to show item images.

Alt Text. Specify the alternate text displayed in rollovers or when the image cannot be displayed.

Thumb Height. Specify the height of the image in pixels.

Thumb Width. Specify the width of the image in pixels.

See
“itemDetailPgm”
on page 266.

Pop Image. This is the relative path and name of the item pop-up image file displayed when *itemDetailPgm* is set to display `op_itemimage.html` for a small image pop-up screen.

Alt Text. Specify the alternate text displayed in rollovers or when the image cannot be displayed.

Pop Height. Specify the height of the image in pixels.

Pop Width. Specify the width of the image in pixels.

See “Icon
Maintenance” on
page 79.

Icon List. Specify a comma-delimited list of icon names defined in Icon Maintenance that display below the item description in the item catalog.

See page 275.

Note The registry setting *showLegendBar* must be Yes to display the icon descriptions.

PDF File. Specify the path—relative to the images directory—and name of a file associated with the item that can be displayed in a browser. This can be an Adobe Acrobat Portable Document Format (PDF) file, such as a data sheet, marketing document, or technical specification. It can also be an HTML file or any other Web-compatible format.

See page 266.

This file displays when *itemDetailPgm* is set to display `op_itemdetail.html`.

Schematic File. Specify the path—relative to the images directory—and name of a file associated with the item that can be displayed in a browser. This can be a PDF or Word file containing technical specifications. This file displays when *itemDetailPgm* is set to display `op_itemdetail.html`.

Language Code. Choose a value from the drop-down selection list of available languages to associate with this customer item record. Leave blank if not implementing items by language.

Minimum Quantity. Optionally, specify a minimum quantity that can be ordered. This sets the default order quantity in the catalog. An error is generated if a quantity less than this is ordered. Leave this field set to 0 (zero) if no minimum applies.

Maximum Quantity. Optionally specify the maximum quantity that can be ordered. The system checks this field when an item is added to the shopping cart and displays an error if the quantity ordered is greater than the maximum. Leave this field set to 0 (zero) if no maximum applies.

Multiple. Optionally, enter the multiple for placing orders for this item. This field is checked when items are added to the shopping cart. Leave this field set to 0 (zero) if no multiple applies.

Integers 1–3. User-defined fields for integer values. These fields can be used during customization to extend the use of this record.

Decimals 1–3. User-defined fields for decimal values. These fields can be used during customization to extend the use of this record.

Characters 1–5. User-defined fields for character values. These fields can be used during customization to extend the use of this record.

Other Fields 1–15. User-defined fields for text strings. These fields can be used during customization to extend the use of this record.

Codes 0–5. Enter the item types (category codes) assigned to this item. The item types define the hierarchy for grouping items for display, with 0 (zero) as the top-most down the hierarchy to 5.

▶ See “Item Types Maintenance” on page 87.

Clicking a command button executes one of the following actions:

- Add saves the new record to the database. All required fields—indicated by alternate field color—must be populated prior to saving a record. Before saving, the system verifies that the record is unique and displays an error if it is not.
- Cancel closes the window without adding the record.

Modifying a Customer Item Entry

The Modify function of Customer Item Maintenance lets an administrator modify existing customer item entries. Requirements for adding a record are the same as for editing a record.

To modify an entry:

- 1 Display the record to modify.
- 2 Click the Customer Number link in the row of the record to be modified. Clicking the link displays the edit screen.
- 3 Enter data into the appropriate fields. Fields that do not allow change are indicated by a second alternate color.
- 4 Click Save to commit the changes.

▶ See field descriptions starting on page 53.

Security Group Maintenance

Security Group Maintenance lets administrators create groups of functions on a common menu. When a function is not assigned to a user's security group, the menu button or link does not display on their screen. Administrators assign users to one security group, limiting users to specifically defined QAD CSS menus. Security is enforced on access to every QAD CSS page. A user can be assigned to one group only.

You can specify security groups in the following functions:

▶ See page 92.	• Menu Button Maintenance
▶ See page 66.	• User Maintenance
▶ See page 97.	• Menu Maintenance

QAD CSS makes extensive use of security groups and related functions throughout the application.

You can also use security groups as a key value in the system registry to control the behavior of the site based on security group membership.

See “System Registry Maintenance” on page 117.

Before defining security groups, consider how you want to divide up users based on functional roles. For example, you may want administrators, sales personnel, and support staff to have access to different functions. You may want one group for all customers or several groups based on your relationship with particular customers.

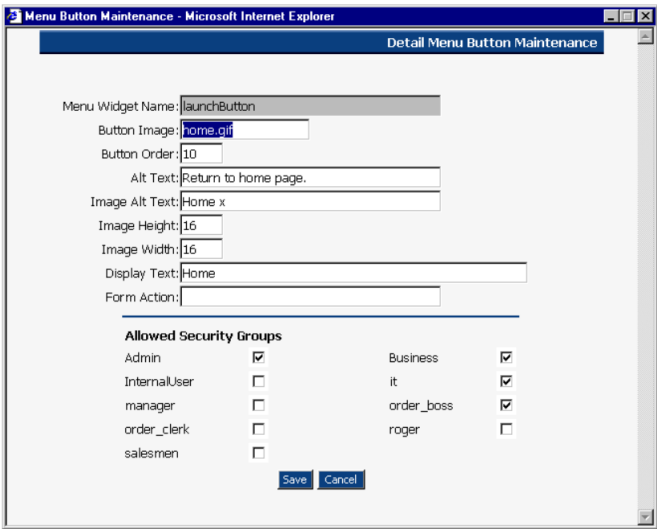


Fig. 2.17
Security Groups
Applied to
Maintenance
Programs

The menu location of Security Group Maintenance is Home Menu|Administration Menu|Security Group Maintenance.

Clicking the Security Group Maintenance menu option displays the screen in Figure 2.18.

Fig. 2.18
Security Group
Maintenance



Table 2.6 summarizes the contents of the Security Group Maintenance navigation screen.

Table 2.6
Security Group
Maintenance
Navigation

Column	Search	Search Type	Sort	Description	Link
Group Name	Y	Begins	Y	Unique alphanumeric text that identifies the QAD CSS security group. Assigning a descriptive name can help to define the purpose of the security group for users.	Y
Group Description	N	n/a	N	A free-form text area to define the use or purpose of the security group.	N

Related QAD CSS functions:

- ♦ See page 66.
- User Maintenance

Adding a Security Group

The Add function of Security Group Maintenance lets an administrator add security group profiles. A security group is an arbitrary grouping of QAD CSS functions usually designed to define the role of a group of users and their use of QAD CSS.

Note QAD CSS is shipped with a single security group of IT.

To create a new entry:

- 1 Click Add in the navigation window to display the edit screen in Add mode.
- 2 Enter data into the appropriate fields.
- 3 Click Add in the edit window to save the record.

Fig. 2.19
Detail Edit Security Group

Security Group Name. Unique alphanumeric text that identifies the QAD CSS security group. Assigning a meaningful name can help to define the purpose of the security group for users of QAD CSS.

Security Group Description. A free-form text area to define the use or purpose of the security group.

Clicking a command button executes one of the following actions:

- Add saves the new record to the database. All required fields—indicated by alternate field color—must be populated prior to saving a record. Before saving, the system verifies that the record is unique and displays an error if it is not.
- Cancel closes the window without adding the record.

Modifying a Security Group

The Modify function of Security Group Maintenance lets an administrator modify existing security group entries. Requirements for adding a record are the same as for editing a record.

To modify an entry:

- 1 Display the record to modify.
- 2 Click the Group Name link in the row of the record to be modified. Clicking the link displays the edit screen.
- 3 Enter data into the appropriate fields. Fields that do not allow change are indicated by a second alternate color.
- 4 Click Save to commit your changes.

▶ See field descriptions starting on page 60.

User Registration

QAD CSS allows potential customers to request a user log-in by registering directly from a QAD CSS Web site. When a customer submits an online registration, a new account is not created immediately. The information the customer provides on the online registration form is passed to User Registration where an administrator can review the request and set up a new customer account in MFG/PRO and QAD CSS.

Important You must verify that the customer record exists in MFG/PRO before you can create the user.

The menu location for online registration is Home Menu|Misc Menu|Register Online Start.

Clicking the Register Online Start menu option displays the initial online registration screen that contains two buttons—one to start the registration process and one to cancel the request. Clicking Open Registration Page displays the initial registration screen shown in Figure 2.20.

The screenshot shows a web browser window titled "Register Online Company Info - Microsoft Internet Explorer". The page content is titled "Detail Register Online Company Info". It includes a section "Register For Online Access" with instructions to complete a form for on-line access. Below this, it lists features available with on-line access and provides contact information for customer service. The main section is a form titled "Please supply the following data. Required fields are marked with an asterisk." The form contains the following fields: "Company Name*", "Address 1*", "Address 2", "City*", "State/Province*", "Zip/Postal Code*", "Country*" (a dropdown menu currently showing "Australia"), "Phone Number/Extension*", and "Fax Number*". At the bottom of the form are "Next" and "Cancel" buttons. The browser's status bar at the bottom shows "Done" and "Internet".

Fig. 2.20
Detail Register
Online Company
Info

After filling in their company information, the user clicks Next to proceed to the second registration screen requesting information about the user, as shown in Figure 2.21.

The screenshot shows a web browser window titled "Register Online User Info - Microsoft Internet Explorer". The page content is titled "Detail Register Online User Info". It includes a section "Please provide the following information for user setup". The form contains the following fields: "Name*", "Job Title*", "E-Mail Address*", "Phone*", "User ID*", "Secret Question*", "Secret Answer*", and "Account Number". At the bottom of the form are "Next" and "Cancel" buttons. The browser's status bar at the bottom shows "Done" and "Internet".

Fig. 2.21
Detail Register
Online User Info

Clicking Next displays a summary of the online registration information. Clicking Submit on the summary screen sends the registration information to User Registration.

Administrators use User Registration to review and verify user information before an actual account is set up in MFG/PRO and QAD CSS.

▶ See “E-Mail Master Maintenance” on page 187.

When an online request is submitted, an e-mail notification can be sent automatically to the requestor and to the person responsible for setting up new customer accounts.

Before the user can be established in QAD CSS, other setup is required:

▶ See page 66.

▶ See page 284.

- 1 Verify that the account is a valid MFG/PRO customer. If not, a customer record must be defined in MFG/PRO.
- 2 A default user must be defined in User Maintenance in QAD CSS to supply default information when the new user records are created.
- 3 This user ID must be specified as the value for the *defaultCustomerRegistration* system registry key in System Registry Maintenance.
- 4 Optionally enable e-mail notification so that an administrator is alerted when a new registration form is submitted. Otherwise, you must implement procedures to review User Registration on a regular basis.

Note QAD Global Services may need to modify the program that executes the commit for the new user records to supply additional default information, depending on the specific needs of your implementation.

When administrators are notified, they can review the registration request in User Registration. Initially, they have two choices. They can:

- Click Decline to reject this user request.
- Click Verify Customer to indicate that they have validated that the user has supplied a valid account number. This is necessary to ensure that the account corresponds to a customer record defined in QAD CSS and MFG/PRO.

After the account passes verification, the administrator can then click Create User to create a new user record using the information supplied during registration in combination with the defaults associated with the default user ID.

The menu location of User Registration is Home Menu|Administration Menu|User Registration.

Clicking the User Registration menu option displays the screen in Figure 2.22.

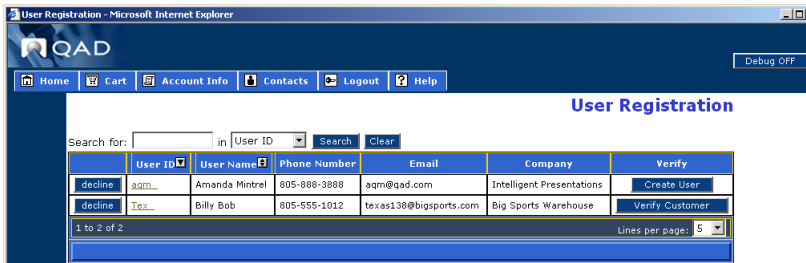


Fig. 2.22
User Registration

Table 2.7 summarizes the contents of the User Registration navigation screen.

Column	Search	Search Type	Sort	Description	Link
Decline	N	n/a	N	Click to reject this user.	N
User ID	Y	Begins	Y	A unique code used to identify the user record.	Y
User Name	Y	Begins	Y	Proper name of the user requesting a user ID.	N
Phone Number	N	n/a	N	The phone number of the user.	N
E-Mail	N	n/a	N	The e-mail address of the user.	N
Company	N	n/a	N	The name of the company where the user works.	N

Table 2.7
User Registration Navigation

Column	Search	Search Type	Sort	Description	Link
Verify Customer	N	n/a	N	Click Verify to indicate that you have verified that the user has specified a valid account (customer) number. The button then changes to Create User.	N
Create User	N	n/a	N	Click Create User to create a new user record based on the online registration information.	N

Detail User Registration Editor

Clicking the User ID link activates the Detail User Registration screen.

Fig. 2.23
Detail User
Registration

The components of the detail user registration editor screen are:

User ID. Unique ID of the user currently logged in.

User Name. Unique name of the user.

Account Number. The code representing the company defined in QAD CSS and MFG/PRO that this user is associated with. When the user record is created in User Maintenance, it will be associated with the specified company. You can click the Verify Company name to ensure that this is a valid company ID.

If the user registering does not know their company or supplied an invalid company, you may need to contact them regarding their account information.

User Title. The user's title representing their function at their company.

User Phone. Complete telephone listing including country and area codes.

E-Mail Address. E-mail address associated with this user record.

Secret Question. Used to verify user identity when they have forgotten their password.

Secret Answer. Works in conjunction with Secret Question to identify a user.

Clicking a command button executes one of the following actions:

- Save commits your changes to the database.
- Cancel closes the window without changing the record.

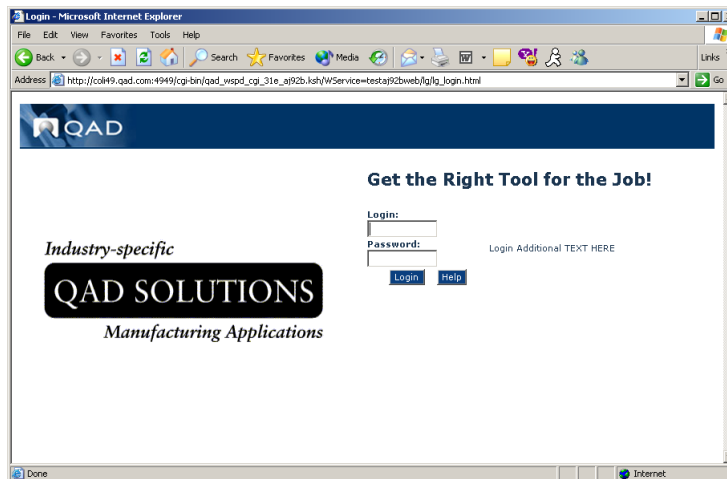
User Maintenance

This function lets administrators establish users and create relationships between QAD CSS and MFG/PRO users. For instance, users in MFG/PRO can be defined as employees, customers, distributors, vendors, suppliers, and so on. User Maintenance is where personal IDs, passwords, contact information, and preferences are maintained.

Note In an MFG/PRO eB2.1 implementation, users in MFG/PRO are not related to a specific domain. However, in QAD CSS, they are always associated with a customer and customer records are domain specific. Therefore, in QAD CSS user records are also domain specific.

Figure 2.24 illustrates how the user is prompted during log-in. This page, including the message content, can be customized at each installation.

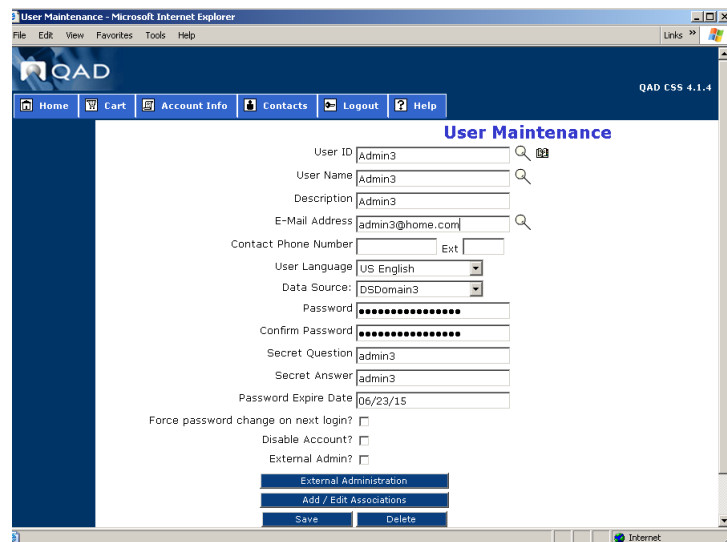
Fig. 2.24
User Log-In



The menu location of User Maintenance is Home Menu|Administration Menu|User Maintenance.

Clicking the User Maintenance menu option displays the screen in Figure 2.25.

Fig. 2.25
User Maintenance



The key screen components of the User Maintenance navigation screen are:

User ID. Specify a unique code to identify this user record. Click the browse icon to display a list of defined users.

User Name. Enter the proper name for the user, as it is to appear in the QAD CSS environment.

Description. A brief description of the user account; for example, the user's title or department.

E-Mail Address. Enter the preferred e-mail address for this user account. QAD CSS uses this address when sending an associated e-mail event.

▶ See "E-Mail Master Maintenance" on page 187.

Contact Phone Number. Enter the contact telephone number for this user account in case the user must be reached by voice.

Ext. Enter the contact telephone extension number, if applicable.

User Language. Enter the user's preferred language for the QAD CSS interface. This functions properly only if the current installation of QAD CSS has multiple language licenses.

The system registry setting *useLangItems* determines how the user's language affects the display of items in the item catalog.

▶ See page 281.

Data Source. In an MFG/PRO eB2.1 installation, choose the domain that this user is associated with.

Password. A sequence of characters required for access to the QAD CSS site.

Note The password length is determined by the *minPasswordLength* registry setting.

▶ See page 289.

Confirm Password. Verifies the sequence required in the password field. Used as a double-entry technique to avoid misspelled passwords.

Secret Question and Secret Answer. The secret question and answer that is provided during the QAD CSS registration will help QAD CSS and the administrator verify the identity of the user if the forgotten password must be reset.

Password Expire Date. Specify the date that this user’s password expires.

Force password change on next login. Select this option to force this user to change passwords during next log-in.

Disable Account. Select this option to lock out the related user account. A new account is disabled by default. You cannot activate it until you create an association for the new user.

External Admin. Select this option to indicate that this user can access external administration functions. These are set up by clicking the External Administration button and assigning users or groups to this user. You should only enable this feature after carefully coordinating with this user what responsibilities will be required.

Note This record must be saved before proceeding to external administrator setup.

External Administration button. This button displays the setup page for external administration.

Add/Edit Associations button. This button displays the customer association screen (see Figure 2.26)

See “External Administration Entries” on page 73.

User Detail Maintenance

Administrators can add, edit, and delete customer associations by clicking Add/Edit Associations. This displays the User Detail Maintenance screen. Any customer accounts currently associated with this user display in this screen.

Note The data displayed and maintained here is also used to populate the customer selection screen at log-in.

Fig. 2.26
User Detail
Maintenance



User Detail Editor

Clicking the Customer ID link or the Add button activates the User Detail Editor screen.

Important The potential for security breaches should not be overlooked. This should only be administered by qualified individuals.

Fig. 2.27
User Detail Editor

The components of the user detail editor screen are:

Company ID. Specify the unique number that identifies the company in MFG/PRO to be associated with this user. The values you specify in this screen apply when the user selects this customer association during log-in.

Company Name. Specify the descriptive name associated with the record for user and administrative identification.

Security Group. Enter the security group to which this individual is assigned. Only one group is allowed. The user's security group determines aspects of the user interface such as which menus can be accessed. Set up security groups in Security Maintenance.

▶ See "Security Group Maintenance" on page 58.

You can also use the security group as a key value in the system registry to control the behavior of the site based on security group membership.

ID Type. Select a value from the drop-down list that indicates the type of users. Choices are:

- Customer, indicating an address set up in Customer Maintenance (2.1.1) in MFG/PRO

- Vendor, indicating an address set up in Supplier Maintenance (3.1.1) in MFG/PRO
- Internal User, indicating an address set up in User Maintenance (36.3.18 in MFG/PRO eB2, 36.3.1 in eB2.1)

This field should typically be set to Customer. In this release of QAD CSS, setting it to Vendor or Internal has no effect. The ID type must be Customer to define external associations.

Start Page. Specify the page the user is taken to upon successful log-in. This is typically `lg/lg_index.html`, but you can change it to another page for specific users.

Marketing Group. Optionally, enter one or more optional target marketing groups to which this user is assigned. For more than one group, enter a comma-delimited list.

Note This value is not validated, so make sure you plan your marketing groups and enter them consistently.

See “System Registry Maintenance” on page 117.

You can use the marketing group as a key value in the system registry to control the behavior of the site based on marketing group membership.

User Currency. Specify the user’s preferred currency (optional).

See page 281.

The *userCurrency* registry setting can override the currency associated with a user in User Maintenance. When a user logs in to QAD CSS, the system checks for a currency in this order:

- First, a currency defined with the *userCurrency* setting
- If blank, the value assigned to the QAD CSS user in User Maintenance
- If user currency is blank, the value from the customer bill-to in MFG/PRO

This currency is associated with the session at log-in and determines the currency used for displaying prices.

Note If you are using QAD CSS with Trade Management (TrM), the currency of a user who logs in with a TrM customer is always set to the associated TrM division currency, regardless of the setting of *userCurrency*.

Show Euro. Selecting this option displays euro as an alternate currency in addition to the preferred currency. This is typically used with a customer in a country that is in transition to the euro as the national currency.

Save button. Commits the changes to the database.

Cancel button. Closes the screen without any changes becoming part of the permanent record.

External Administration Entries

External Administration outsources user account administration to external parties without involving the host site QAD CSS administrator. In this case, a customer is authorized to manage their own QAD CSS users. To implement this feature, choose the user ID to set up as an external administrator. Set External Admin to Yes in the User Maintenance screen and then click External Administration to display the External Administration Association screen.

Allowable Type	Allowable Value
User ID	
cust	1001000
security	order_clerk

Fig. 2.28
External
Administration
Association

In this screen, you specify which users or groups the user you are currently setting up can administer. For example, a large client with many users in different geographic locations can directly maintain those users independently of the main QAD CSS administrator. This lets customers control the user base according to their needs.

Example John Smith is an IT Manager at the headquarters of ABC Company, a multinational holding corporation. You want to let John change information for all of the users of Nationale Company, a French subsidiary of ABC company. You set Allowable Type to Customer and Allowable Value to the customer number associated with Nationale Company. Once this record is created, John can change data associated with all Nationale Company users.

Important Do not modify the allowable types in the drop-down menu.

To specify the records that a customer can administer, follow these steps:

- 1 Define the ID Type as Customer.
 - a Select ID Type from the Allowable Type drop-down menu.
 - b Enter Customer in Allowable Value.
 - c Click add to submit the values.
- 2 Associate any security groups the external administrator should be able to administer. At least one security group is required for each external administrator profile.
 - a Select Security Group from the Allowable Type drop-down menu.
 - b Using the browse, select a valid security group in Allowable Value.
 - c Click Add to add the security group to the external administrator profile.
- 3 Select an association group from the drop-down menu (User ID, Customer Number, Vendor Number, Internal User, Security Group). Typically, users are selected by customer number or security group.

Note Vendor Number and Internal User do not apply to standard QAD CSS.
- 4 Specify the customers that the external administrator can manage. At least one customer must be defined for each external administrator profile.
 - a Select Customer from the Allowable Type drop-down menu.
 - b Using the browse, select the customer whose user accounts are to be administered by the external administrator.
 - c Click Add to add the customer to the external administrator profile.
 - d Repeat these steps to associate additional customers.

- 5 Associate user accounts the external administrator can manage:
 - a Select User ID from the Allowable Type drop-down.
 - b Using the browse, select the user whose user account is to be administered by the external administrator.
 - c Click add to add the user account to the external administrator profile.
 - d Repeat these steps to associate additional users as needed.

To delete associated rights, click delete on the left end of the row.

Managing the Web Order-Entry Design

This section describes the administrative functions related to the appearance of the order-entry pages and item catalog:

- Carrier Href Maintenance
- Icon Maintenance
- Item Layout Maintenance
- Item Types Maintenance
- Menu Button Maintenance
- Menu Maintenance
- Specials Maintenance

Carrier Href Maintenance

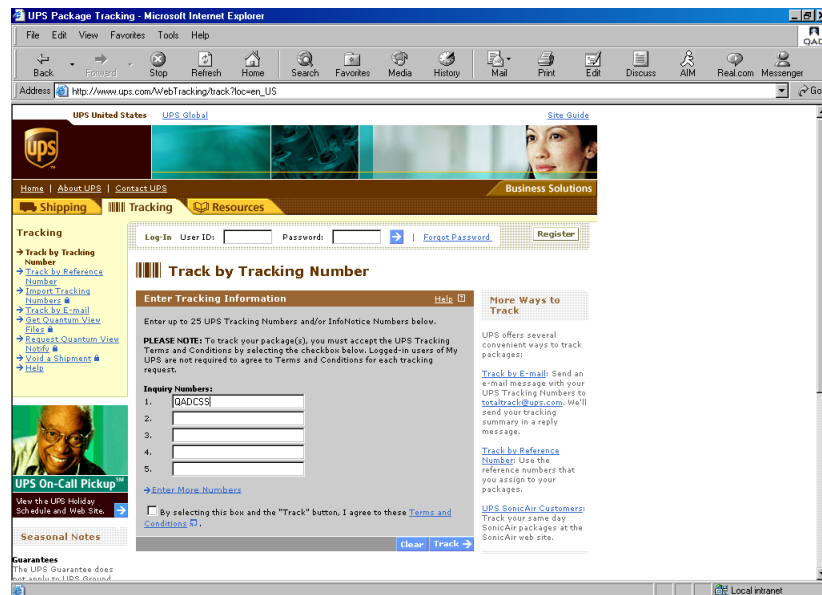
The Carrier Href Maintenance function lets administrators associate HTML links with the tracking capabilities of shipping carrier Web sites such as UPS or FedEx. The links are usually made available to the user in the Order Tracking Report. If a tracking number is available, the shipping carrier site offers linking capability, and the link is defined in Carrier Href Maintenance, QAD CSS automatically fills in the applicable fields from the carrier's Web site and the tracking information is displayed.

QAD CSS determines the tracking number by searching the invoice history for the bill of lading number associated with the customer sales order (ih_bol). The carrier code is determined by the value for the Ship Via code (ih_shipvia).

Important In order for your customers to be able to use this feature, you must ensure that the Ship Via field is populated during order entry.

Clicking the link displays the carrier's tracking page in a new browser window, as shown in Figure 2.29.

Fig. 2.29
Carrier Tracking
Page



The menu location of Carrier Href Maintenance is Home Menu|Administration Menu|Carrier Href Maintenance.

Note This is an advanced feature. Consider restricting access to authorized developers.

Clicking the Carrier Href Maintenance menu option displays the screen in Figure 2.30.



Fig. 2.30
Carrier Href
Maintenance

Table 2.8 summarizes the contents of the Carrier Href Maintenance navigation screen.

Column	Search	Search Type	Sort	Description	Link
Language	Y	Equals	Y	The language that QAD CSS uses to link the Carrier Web site to the correct language of the user.	N
Carrier Code	Y	Equals	Y	The MFG/PRO carrier code (Ship Via) used to identify shipping companies. Example: UPS	Y
Carrier Name	Y	Equals	Y	A word or phrase that constitutes the designation of the shipping carrier. Example: United Parcel Service	N

Table 2.8
Carrier Href
Maintenance
Navigation

Related QAD CSS functions:

- Order Tracking Report

Adding a Carrier Href Entry

The Add function of Carrier Href Maintenance lets an administrator add custom links to carrier shipment tracking sites.

To create a new entry:

- 1 Click Add in the navigation window to display the edit screen in Add mode.
- 2 Enter data into the appropriate fields.

- 3 Click Add in the edit window to save the record.

Fig. 2.31
Detail Edit Carrier
Href

Language Code. The language that QAD CSS uses to link the carrier Web site to the correct language of the user.

Carrier Code. The MFG/PRO ship via code used to identify shipping companies, such as UPS.

Carrier Name. A word or phrase that constitutes the designation of the shipping carrier, such as United Parcel Service.

Carrier Href. The complete JavaScript/HTML anchor tag to open the carrier site. The contents can include symbol replacement variables that will be substituted at run time.

Clicking a command button executes one of the following actions:

- Add saves the new record to the database. All required fields—indicated by alternate field color—must be populated prior to saving a record. Before saving, the system verifies that the record is unique and displays an error if it is not.
- Cancel closes the window without adding the record.

Modifying a Carrier Href Entry

The Modify function of Carrier Href Maintenance lets an administrator modify existing Carrier Href entries. Requirements for adding a record are the same as for editing a record.

To modify an entry:

- 1 Display the record to modify.
- 2 Click the Carrier Code link in the row of the record to be modified. Clicking the link displays the edit screen.
- 3 Enter data into the appropriate fields. Fields that do not allow change are indicated by a second alternate color.
- 4 Click Save to commit the changes.

▶ See field descriptions starting on page 77.

Icon Maintenance

Icon maintenance lets an administrator set icons (pictures) that are used to communicate information visually. There are two different kinds of icons:

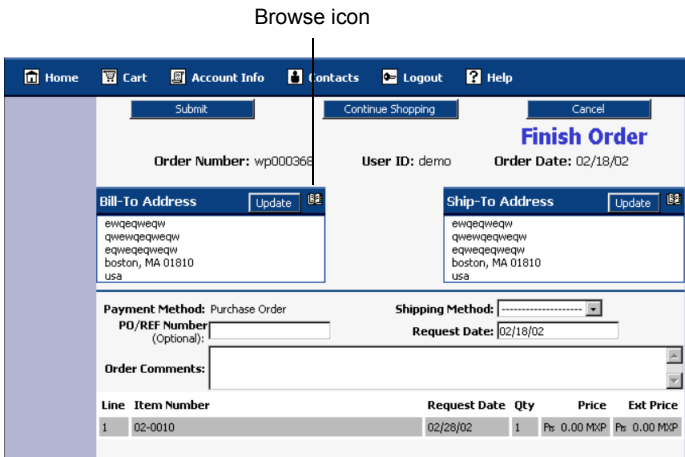
- Action icons can be clicked for a more detailed description, picture, or PDF corresponding to the item; for example, the camera icon suggests that there is a picture available for this item.
- Information icons provide more information about the item; for example, the USDA logo tells the user that this item is USDA-certified meat.

You can associate a list of icons with an item in Customer Item Maintenance. The *showLegendBar* registry setting determines if icons associated with an item display below the item description in the catalog and a legend bar displays at the top of the product catalog. The legend displays the names of the icons associated with the items as defined in Icon Maintenance.

▶ See page 275.

Note It is strongly recommended that only one icon type be implemented to prevent confusing the user.

Fig. 2.32
Displaying Icons



The Icon Maintenance administration function menu location is Home Menu|Administration Menu|Icon Maintenance.

Clicking the Icon Maintenance menu option displays the screen in Figure 2.33.

Fig. 2.33
Icon Maintenance



Table 2.9 summarizes the contents of the Icon Maintenance navigation screen.

Table 2.9
Icon Maintenance
Navigation

Column	Search	Search Type	Sort	Description	Link
Icon Name	Y	Begins	Y	A unique identifier for this icon.	Y
Icon Action	N	n/a	N	A command that directs QAD CSS to perform a function when the icon is invoked; for example, OPEN PDF. Leave this field blank for informational icons.	N

Column	Search	Search Type	Sort	Description	Link
Image Location	N	n/a	N	The path and file name of the icon image relative to the QAD CSS images directory.	N
Alt Text	N	n/a	N	Text that appears when a user's mouse moves over the icon.	N

Related QAD CSS functions:

- Action Icons Report

See page 236.

Adding an Icon Entry

The Add function of Icon Maintenance lets an administrator add custom icons and define their use to QAD CSS. The following information is required to complete this process:

- The name and location of the graphics file of the icon image
- The QAD CSS action associated with the icon file
- A meaningful name to identify this icon
- A meaningful alternative message describing the icon's use

To create a new entry:

- 1 Click Add in the navigation window to display the edit screen in Add mode.
- 2 Enter data into the appropriate fields.
- 3 Click Add in the edit window to save the record.

The screenshot shows a web browser window titled 'Edit Icons - Microsoft Internet Explorer'. Inside, there's a form titled 'Detail Edit Icons'. The form has the following fields and values:

- Name: icon1
- Alt Text: This is icon 1
- Icon Action: (empty)
- Icon Type: Plain (dropdown menu)
- Image Location: oe_icons/office_type.gif
- Image Height: 24
- Image Width: 24

At the bottom of the form, there are two buttons: 'Add' and 'Cancel'.

Fig. 2.34
Detail Edit Icons

Name. Specify a unique identifier for this icon. The icon name displays in the legend bar when the *showLegendBar* registry setting is Yes.

Alt Text. Enter text that appears when a user's mouse moves over the icon or the graphic cannot be displayed.

Icon Action. Optionally, specify a command that directs QAD CSS to perform a function when the icon is invoked, such as OPEN PDF. Leave this field blank for informational icons.

Note Action icons require customization to enable or build the specific action to be executed.

Icon Type. Valid values are Plain and Link. The icon type defines what action, if any, is executed when the icon is invoked.

Plain: The icon is generated without associated actions.

Link: The icon is generated on the page by passing the icon name and icon action to the QAD CSS `actionicon.js` file.

Image Location. Specify the path and file name of the icon image relative to the QAD CSS images directory.

Image Height. Enter the height of the image in pixels.

Image Width. Enter the width of the image in pixels.

Note Always specify image height and width to optimize the display performance of the Web site in all Web browsers.

Clicking a command button executes one of the following actions:

- Add saves the new record to the database in the `wpro_icons` table. All required fields—indicated by alternate field color—must be populated prior to saving a record. Before saving, the system verifies that the record is unique and displays an error if it is not.
- Cancel closes the window without adding the record.

Modifying an Icon Entry

The Modify function of Icon Maintenance lets an administrator modify existing icon entries. Requirements for adding a record are the same as for editing a record.

To modify an entry:

- 1 Display the record to modify.
- 2 Click the Name link in the row of the record to be modified. Clicking the link displays the edit screen.
- 3 Enter data into the appropriate fields. Fields that do not allow change are indicated by a second alternate color.
- 4 Click Save to commit your changes.

▶ See field descriptions starting on page 81.

Item Layout Maintenance

The item catalog display is a list of items arranged systematically with descriptive details. This list is a result of searches or specific item category selections performed by the user. The arrangement of the information in the item catalog is one of many QAD CSS personalization features. This feature is controlled by Item Layout Maintenance.

See *Implementation Guide: QAD Customer Self Service* for in-depth details about designing the layout of information in the catalog.

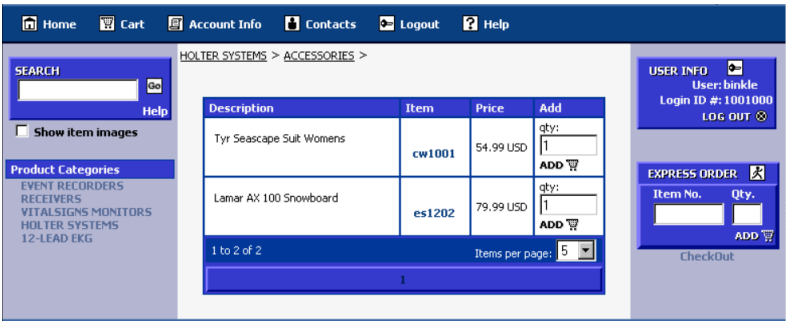
Item Layout Maintenance lets an administrator maintain predefined registry options that determine which product details are displayed. Through this function, administrators determine the pictures, descriptive text, pricing, reference, and indexing that appear on the line.

The following registry settings affect the display of this screen:

- *itemLayout* determines the default value of the Display check box for the 15 fields in Item Layout Maintenance. This, in turn, determines what displays in the product catalog. ▶ See page 287.
- *itemLayoutHeader* defines default values for the Header Label fields in Item Layout Maintenance. These, in turn, determine what displays above the associated column in the product catalog. ▶ See page 287.
- *itemLayoutLabel* defines default values for the Side Label fields in Item Layout Maintenance. These, in turn, determine what displays to the left of the item detail in the product catalog. ▶ See page 288.

Figure 2.35 illustrates how the catalog appears using values defined in Item Layout Maintenance.

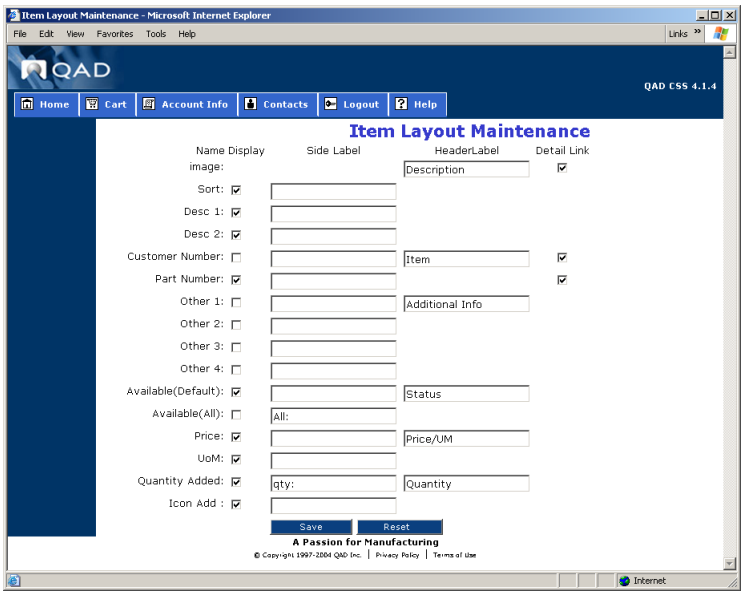
Fig. 2.35
Displaying Product
Details



The menu location of Item Layout Maintenance is Home Menu|Administration Menu|Item Layout Maintenance.

Clicking the Item Layout Maintenance menu option displays the screen in Figure 2.36.

Fig. 2.36
Item Layout
Maintenance



The Item Layout Maintenance screen is arranged by columns. The name of the function (label) is followed by a check box used to turn the display function on or off. After that, the side label displays, which refers to text

that will display next to the item in the catalog. The header label identifies text values that display as column headings. The detail link permits users to click through to an additional page with a more detailed description of an item.

The Item Layout Maintenance screen is arranged by columns.

Name. This column displays the name of the fields that can be included in the catalog.

Display. The check boxes in this column determine if the associated field is displayed in the catalog.

Side Label. The text entered in these fields displays in the item rows in the catalog.

Header Label. The text entered in these fields displays as column headings in the item catalog.

Detail Link. The check boxes in this column determine if the associated field is a hyperlink to a page with a more detailed description of the item.

The presentation of the Item Layout Maintenance screen is managed through a number of system registry settings. These settings determine the default values for the various screen elements, as well as the header labels and side labels.

▶ See settings starting on page 287.

The fields being managed through Item Layout Maintenance correspond to fields loaded from MFG/PRO using Catalog Load.

Sort. Enabling this option displays the text in the sort description field from the QAD CSS item table. This field does not have a corresponding data element in MFG/PRO. If you want to use this field in your item display, you must supply a value during the item load.

The sort description is often used to control the arrangement of items in the catalog based on a marketing design that may not be part of the item definition in MFG/PRO.

Desc 1. Enabling this option displays the text in the item description 1 field from the QAD CSS item table.

Desc 2. Enabling this option displays the text in the item description 2 field from the QAD CSS item table.

Customer Number. Enabling this option displays the customer item number.

Part Number. Enabling this option displays the MFG/PRO item number.

Other 1–4. Enabling these options displays optional text stored with the item in the QAD CSS item table.

Available (Default). Enabling this option displays the available quantity in the default site.

Note The default site is associated first with the customer, and then with the item.

Available (All). Enabling this option displays the available quantity in all available sites.

Note You may not want to display the actual quantity available as calculated directly by MFG/PRO since this number does not account for outstanding orders. You probably want to determine an algorithm for adjusting this that better reflects what a customer can order. You can also use the *runGetWhseQty* registry setting to manage the display of quantity available and return a text message.

Price. Enabling this option displays the calculated price of the item at the minimum order quantity.

UoM. Enabling this option displays the selling unit of measure for this item.

Quantity Added. Enabling this option allows the user to update the quantity for this item before adding to the cart.

Icon Add. Enabling this option displays the Add icon so that a user can add this item to the shopping cart.

Save. This button commits changes to the database.

Reset. This button resets all the fields to their last saved state.

Related QAD CSS functions:

- Customer Maintenance

See page 273 for details on registry settings.

See page 47.

- Item Types Maintenance
- Order Entry 1
- Order Entry 2

▶ See page 87.

Item Types Maintenance

The QAD CSS Item Types Maintenance function lets administrators establish categories of items and their relationships to each other. Item types can be set up globally, by customer group, or by customer. This feature of QAD CSS lets you categorize items as if presented in a sales catalog. This feature may be difficult to implement using Item Master Maintenance (1.4.1) in MFG/PRO.

Note In an MFG/PRO eB2.1 implementation, item types—the same as items—are domain specific. You must indicate which data source (domain) each category is associated with.

Item categories are typically created automatically during the load of item information from MFG/PRO. You can use the function after load to modify category data if needed or associate images with categories if you are using order entry type 2.

Implementation Guide: *QAD Customer Self Service* provides details about using load functions to add MFG/PRO customer and item information to your QAD CSS database.

The implementation of QAD CSS affects both the usage and requirements of item type information stored in QAD CSS. A thorough working knowledge of the item load process and implementation of the Order module is strongly recommended before changing any item type information.

Fig. 2.37
Item Type
Information in
Order Entry

Item categories

Description	Item	Price	Add
High Sierra Double	ae1001	9.97 USD	qty: ADD
Arnette Raven Polarized	ae1002	149.99 USD	qty: ADD
Arnette Deuce Polarized	ae1003	110.99 USD	qty: ADD
Bolle Vapor Polarized	ae1004	109.99 USD	qty: ADD
Timberland Teton	ae1005	92.99 USD	qty: ADD

1 to 5 of 5 Items per page: 5

The menu location of Item Types Maintenance is Home Menu|Administration Menu|Item Types Maintenance.

Clicking the Item Types Maintenance menu option displays the screen in Figure 2.38.

Fig. 2.38
Item Types
Maintenance

	Customer Number	Language	Code 0	Code 1	Code 2	Code 3	Code 4	Code 5
	90000001	eng	OFFICE					
	90000001	eng	OFFICE	DISCRETE				
	90000001	eng	OFFICE	PRINT				

1 to 3 of 3 Lines per page: 5

Table 2.10 summarizes the contents of the Item Types Maintenance navigation screen.

Column	Search	Search Type	Sort	Description	Link
Customer Number	Y	Begins	Y	The unique identifier in both MFG/PRO and QAD CSS. This is an integral link between the two systems. When blank, this record is viewable by all customers.	Y
Language	Y	Begins	Y	Identifies the language of this item type entry.	N
Code 0–5	Y	Begins	Y	The codes that link the category to the items (code 0, 1 ... 5).	N

Table 2.10
Item Types
Maintenance
Navigation

Related QAD CSS functions:

- Security Group Maintenance
- Order Entry 1
- Order Entry 2

See page 58.

Adding an Item Types Entry

The Add function of Item Types Maintenance lets an administrator add new item category nodes to the item structure.

To create a new item types entry:

- 1 Click Add in the navigation window to display the edit screen in Add mode.
- 2 Enter data into the appropriate fields.
- 3 Click Add to commit this function.

Note Category descriptions *must* be unique in relation to the category code. Different category codes cannot share the same description.

Fig. 2.39
Detail Edit Item
Types

Data Source. In an MFG/PRO eB2.1 installation, choose the domain that this item type is associated with.

Note This field does not display in MFG/PRO eB2 implementations.

Customer Number. The unique identifier in both MFG/PRO and QAD CSS. This is an integral link between the two systems. When blank, this record is viewable by all customers.

Language Code. Indicate the language of this item types entry.

Primary Icon Image. The path and file name of the icon image relative to the QAD CSS images directory.

Note All category icons are a feature of Order Entry 2. Primary icons are placed next to the category name in the left panel of the Order Entry 2 item search screen. Other category icons are available for display in the drill-down section that indicates current location in the category tree.

See page 275.

The *showGroupImage* system registry setting determines if the image displays to the right or left of the category description.

Primary Icon Alt Text. The text displayed if the primary icon cannot be displayed.

Primary Icon Height. Enter the height of the image in pixels.

Primary Icon Width. Enter the width of the image in pixels.

Note It is strongly recommended to specify image height and width to optimize the display performance of the Web site in all Web browsers.

Code. Enter a code from 0 through 5 linking the category to the items.

Description. This is the displayed text representing this category.

Note Category descriptions must be unique in relation to the category code. No two category codes can share the same description.

Icon Image. Enter the path and file name of the icon image relative to the QAD CSS images directory.

Icon Alt Text. Enter the text displayed if the primary icon cannot be displayed.

Icon Height. Enter the height of the image in pixels.

Icon Width. Enter the width of the image in pixels.

Clicking a command button executes one of the following actions:

- Add saves the new record to the database in the wpro_itemtypes table. All required fields—indicated by alternate field color—must be populated prior to saving a record. Before saving, the system verifies that the record is unique and displays an error if it is not.
- Cancel closes the window without adding the record.

Modifying an Item Types Entry

The Modify function of Item Types Maintenance lets an administrator modify existing Item Types Entries. Requirements for adding a record are the same as for editing a record.

To modify an entry:

- 1 Display the record to modify.
- 2 Click the Code 0 link in the row of the record to be modified. Clicking the link displays the edit screen.
- 3 Enter data into the appropriate fields. Fields that do not allow change are indicated by a second alternate color.
- 4 Click Save to commit your changes.

♦ See field descriptions starting on page 89.

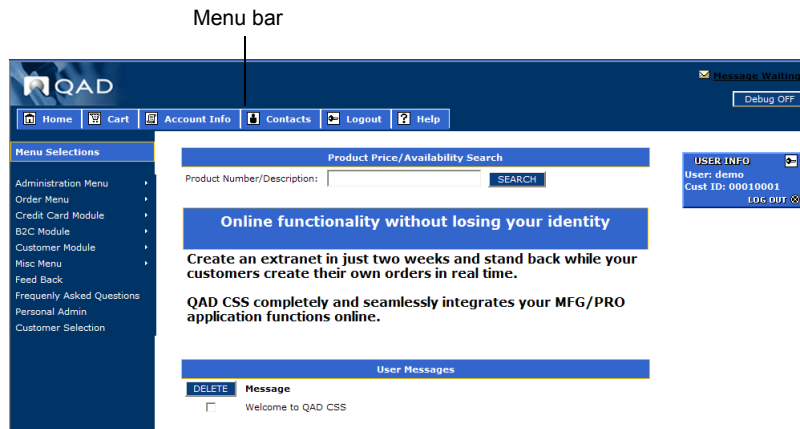
Menu Button Maintenance

Menu Button Maintenance lets administrators set up and configure the QAD CSS menu bar displayed at the top of every page. Through this function, administrators are able to create and apply appropriate security settings to each option. Administrators can also modify, delete, and reorder the menu bar options available. This function is an important aspect of customizing QAD CSS.

Note Advanced technical expertise is required to further extend the functionality and customization options of QAD CSS.

Menu bars may not appear as shown. Actual appearance is controlled through the QAD CSS style sheet; check with the Web master for more details. Even though the appearance may be different, the functionality is identical.

Fig. 2.40
QAD CSS Menu
Bar



The menu location of Menu Button Maintenance is Home Menu|Administration Menu|Menu Button Maintenance.

Clicking the Menu Button Maintenance menu option displays the screen in Figure 2.41.

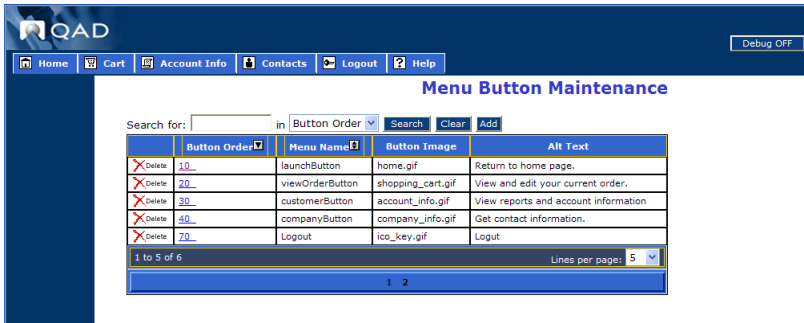


Fig. 2.41
Menu Button
Maintenance

Table 2.11 summarizes the contents of the Menu Button Maintenance navigation screen.

Column	Search	Search Type	Sort	Description	Link
Button Order	Y	Exact	Y	Relative location of the button on the menu bar (left to right).	Y
Menu Name	Y	Begins	Y	Unique text for the menu button.	N
Button Image	N	n/a	N	Complete file name, including relative path, of the associated image that appears on the menu button.	N
Alt Text	N	n/a	N	Mouse-over text associated with this menu button.	N

Table 2.11
Menu Button
Maintenance
Navigation

Note Avoid using spaces when creating button names. This will avoid possible conflicts with certain operating system configurations.

Related QAD CSS functions:

- Security Group Maintenance
 - User Maintenance
 - System Module Maintenance
- See page 58.
 - See page 66.
 - See page 156.

▶ To remove a function from an individual security group, refer to “Modifying a Button on the Menu Button Bar” on page 96.

Deleting a Button from the Menu Button Bar

The Delete function of Menu Button Maintenance lets an administrator permanently delete menu button records.

Important QAD CSS physically deletes this record from the database. There is no undo function to recover deleted records.

To delete a menu function:

- 1 Click the Button Order link in the row of the function to delete.
- 2 Print this screen and save it as a hard copy. This will allow the function to be re-created in the future.
- 3 Click the Cancel button to close the Menu Button edit screen.
- 4 Click the Delete link in the row of the function to delete.
- 5 Click OK to confirm the deletion of the selected function. Click Cancel to prevent the function from being deleted.

Note Consider deactivating a menu bar function by assigning no security groups for this function.

Adding a Button to the Menu Button Bar

The Add function of Menu Button Maintenance lets an administrator add custom buttons and functions to the menu bar. The following information is required to complete this process:

- The name of the button to create
- The display text associated with the button
- The URL or JavaScript function to execute when the button is clicked
- The security groups to which this function will be available
- Optionally, any icon image associated with this function

To create a new menu bar function:

- 1 Click Add in the navigation window to display the edit screen in Add mode.
- 2 Enter data into the appropriate fields.

- 3 Select each security group that will have access to this function on the menu bar. Users assigned to selected security groups will see this option. Users not assigned to selected security groups will not see this option.
- 4 Click Add in the edit window to save the record.

Menu Button Maintenance - Microsoft Internet Explorer

Detail Menu Button Maintenance

Menu Widget Name:

Button Image:

Button Order:

Image Alt Text:

Image Height:

Image Width:

Display Text:

Form Action:

Allowed Security Groups

ComplexB2B	☐	it	☒
MediumB2B	☐	QADqa	☐
SimpleB2B	☐		

Fig. 2.42
Detail Menu Button
Maintenance

Menu Widget Name. Name must be plain character and unique among menu buttons. Spaces are not allowed in the name. If this value is set as LaunchButton, ViewOrderButton, HelpButton, or Documentation, the Form Action field is ignored. These values are not case sensitive.

Button Image. Name must match a physical image name stored in one or more image directories. Does not have to be unique and can be left blank.

Button Order. Value must be 0 (zero) or a positive integer. This represents (in ascending order) the button's position relative to the existing buttons (after the security filter has been applied). Duplicated numbers result in a sort based on Progress database logic.

Note The order that a particular user sees depends on the user's security group.

Image Alt Text. The text that appears when the image is not available.

Image Height/Width. When set to 0 (zero), the loading optimization of the menu bar is not enabled. These values adjust the image to the size it will be displayed. This does not alter the actual image file.

Note Current browsers handle image sizing in unpredictable ways. Set this to a correct value for optimized Web page loading.

Display Text. Plain text that will be displayed on the new button to the right of the image.

▶ See “Menu Widget Name” on page 95.

Form Action. This is the value of the form action variable, which is interpreted by the newHeaderSubmit function in the standard JavaScript library. Some form actions are specifically coded in the JavaScript. If one of these standard format actions is not used (LaunchButton, ViewOrderButton, HelpButton, or Documentation), you must specify either:

- A valid QAD CSS module as set up in Module Maintenance. Typically, this should be a module that is defined as being on the menu.
- A valid URL. In this case, a new browser window will be opened displaying the URL address.

Note The default configuration of QAD CSS has several uses of form action instances. These can serve as examples to demonstrate the various implementations of form actions.

Allowed Security Groups. This is a list of the current security groups, which have been set up through Security Group Maintenance. A check indicates permission to see and execute this button.

Clicking a command button executes one of the following actions:

- Add saves the new record to the database. All required fields—indicated by alternate field color—must be populated prior to saving a record. Before saving, the system verifies that the record is unique and displays an error if it is not.
- Cancel closes the window without adding the record.

Modifying a Button on the Menu Button Bar

The Modify function of Menu Button Maintenance lets an administrator modify existing menu button entries. Requirements for adding a record are the same as for editing a record.

Common tasks are the maintenance of icon images, translated data elements, and adjusting security group assignments. The following information is required to complete this process:

- The display text associated with the button
- The URL or JavaScript function that executes when this button is clicked
- The security groups to which this function is to be made available
- Optionally, any icon image associated with this function

To modify a menu bar function:

- 1 Display the record to modify.
- 2 Click the Button Order link in the row of the function to be modified.
- 3 Enter data into the appropriate fields. Fields that do not allow change are indicated by a second alternate color.
- 4 Select each security group that will have access to this function on the menu bar. Users assigned to selected security groups will see this option. Users not assigned to selected security groups will not see this option.
- 5 Click Save to commit the changes.

▶ See field descriptions starting on page 94.

Menu Maintenance

Menu Maintenance lets administrators edit and configure the QAD CSS navigational menu that displays in the left frame. The navigational menu provides users with direct links to the different modules and pages they are allowed to use based on security group. Unavailable options do not appear to users.

▶ See “Menu Button Maintenance” on page 92 for more information on setting up security.

Administrators can add modules, remove them, and reorder the available menu options. You can also create headers and new hierarchies as needed.

Warning You can reorder menus as needed. However, Customer Selection *must* always be the last item on the menu listing or an error occurs when you attempt to generate the menu system.

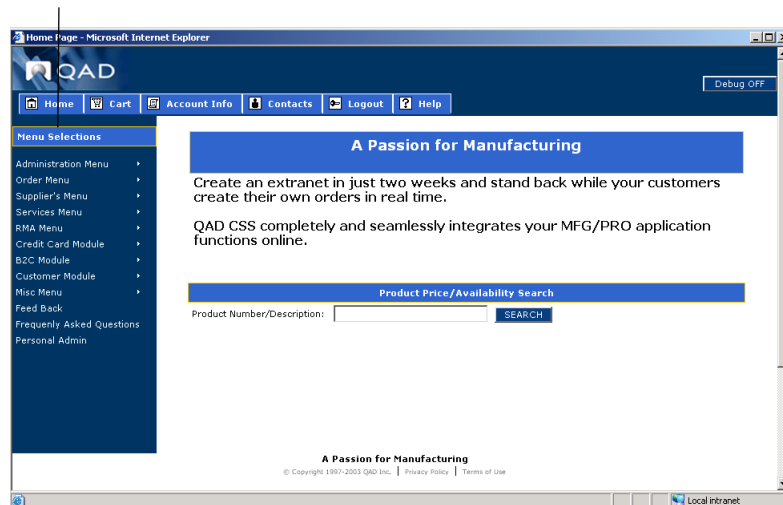
See page 283.

Many other features of the menu system are determined by registry settings defined in System Registry Maintenance. For example, *genMenuHeight*, *genMenuInLin*, *genMenuWidth*, *menuBackGround*, and *menuBackgroundOver* all affect different aspects of the menu system. Appendix A, “System Registry Fields,” provides details about these settings.

Note The creation of functions that do not appear in the menu system should be left to QAD Global Services. Creating and organizing the menus is the last detail to developing new functions.

Fig. 2.43
QAD CSS
Navigation Menu

Navigation menu



See “Security Group Maintenance” on page 58.

Before setting up menus in Menu Maintenance, use Security Group Maintenance to define security groups for users who perform specific roles in the administration of QAD CSS. After security groups are defined, create menus containing the specific functions for those roles.

The Menu Maintenance function is initially loaded with a full set of menus. The function is designed to streamline data entry by letting you copy that structure and tailor it for other groups. After you make a copy for a security group, you can remove the menus they should not access and reorganize the others as needed.

When you change the menus, you must regenerate the corresponding JavaScript file. The JavaScript file is used to enhance system performance. This file is located in the directory specified by the *menuDir* registry setting.

The menu location of Menu Maintenance is Home Menu|Administration Menu|Menu Maintenance.

Clicking the Menu Maintenance menu option displays the screen in Figure 2.44.

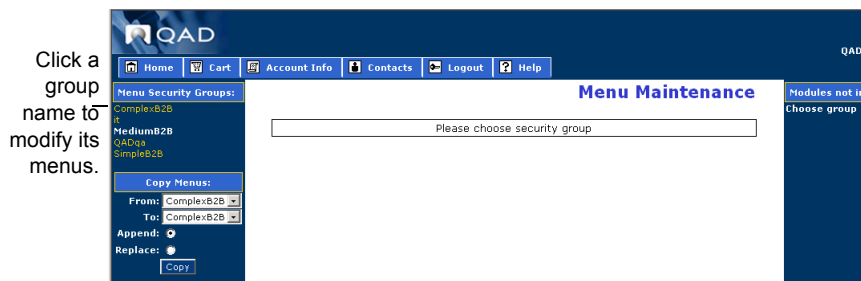


Fig. 2.44
Menu Maintenance

The Menu Maintenance screen is relatively unpopulated. Most of the information and options appear in the left column. The specific components found on this screen are:

Menu Security Group List. List of the security groups previously defined in Security Group Maintenance. This list is selectable and takes you to a second Menu Maintenance screen.

▶ See “Security Group Maintenance” on page 58.

Copy Menu From. This lets administrators copy menu options and hierarchy from one security group and associate them with another.

Copy Menu To. Copies menu options and hierarchy to a new menu. Specify the security group to be associated with the new menu.

Append/Replace Copy Option. When copying menus, choose either Append or Replace.

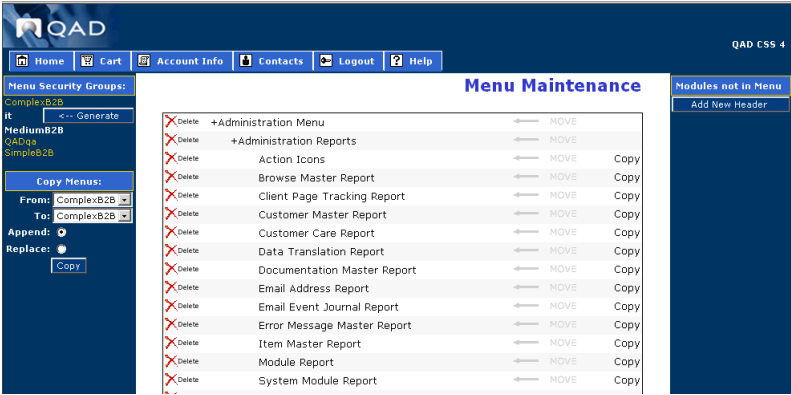
Append: Append the menu setup to the existing menu structure.

Replace: Erase any previous menu setup and copy the one specified.

Copy button. Performs the Copy function and updates the database.

Clicking a security group link displays the menu organization screen. From here, you can modify the menu hierarchy and order.

Fig. 2.45
Menu Organization
Screen



The specific components found on this screen are:

Generate button. After you make changes to the menus for the selected security group, click Generate to implement the changes into the navigational menu for the corresponding users.

See page 289.

Generating the menus is an optimization feature. It creates or updates a JavaScript file that is placed in the directory specified by the *menuDir* registry setting. Displaying menus based on the JavaScript file enhances system performance.

See page 285.

During system setup, you can choose to display menus in real time by setting the system registry field *genMenuInLine* to False. When *genMenuInLine* is False, any users currently logged in must log out and log back in for the changes to take effect.

Menu generation is carried out for all licensed languages.

Delete. Deletes the record of the corresponding row.

Note The record will now display under the Modules not on Menu list, unless it has been physically removed from the system using System Module Maintenance.

See Figure 2.46
on page 102.

Edit Header/Menu Module Option. Click on a menu name to display a new window where the record can be modified.

Move To Link. After selecting (highlighting) a move link, click the arrow located next to the item where you want the menu item to display. Clicking the arrow moves the selected menu above the location you are pointing to in the hierarchy/order.

Move Link. Click the Move link to select an item you want to move.

Copy Link. Click this link to open a copy of the menu in the corresponding row in the Detail Edit Menu screen. You can then modify the attributes as needed to create a new menu item.

When you save the copy, the new menu item will be placed at the bottom of the menu list. You can use the Move link to move it to the position where you want it to display.

Modules not in Menu. These are the modules (menu items) that are not currently available to the selected security group. Click on one of these to move it to the active list.

When you move the module, the new menu item will be placed at the bottom of the menu list. You can use the Move link to move it to the position where you want it to display.

Add New Header. This adds a menu selection (by default, named *new header*). You can then edit this new menu item by clicking on it and give the header a new name.

Moving Menu Entries

Menu Maintenance lets administrators move menus to new positions in the menu hierarchy. To move a menu:

- 1 From the Menu Maintenance screen, select the security group associated with the menu structure to be altered.
- 2 Click the Move button adjacent to the menu item to be moved.
- 3 Click the left pointing arrow adjacent the row above where you want the menu entry to display.
- 4 The screen will refresh with the change applied.

Adding a Menu Entry

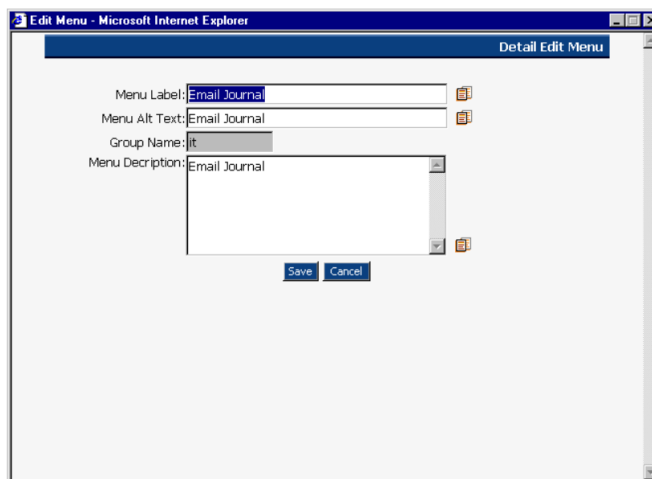
The Add New Header function of Menu Maintenance lets an administrator add custom menu options documents and associate them with specific QAD CSS pages.

To create a new entry:

- 1 Click the Add New Header button in the right column of the Menu Maintenance screen.
- 2 Click New Header from the bottom of the menu list to display the menu edit window.
- 3 Enter data into the appropriate fields.
- 4 Click Add in the edit window to save the record.

Clicking a menu item from Menu Maintenance displays the screen in Figure 2.46.

Fig. 2.46
Detail Edit Menu



The components of the menu edit screen are:

Menu Label. The text as it will appear on the menu. This has a translation option. To see the language options and alter the translated text, click the translation icon.

Menu Alt Text. The text that displays on mouse hover. This has a translation option. To see the language options and alter the translated text, click the translation icon.

Group Name. The security group to which this record belongs.

Menu Description. A description of the purpose of the menu. This can be helpful identifying the evolution of your menu system.

Clicking a command button executes one of the following actions:

- Save commits the record to the database.
- Cancel returns to the menu selection screen without making any changes to the database.

Modifying a Menu Entry

The Modify function of Menu Maintenance lets an administrator modify existing menu entries. Requirements for adding a record are the same as for editing a record.

To modify an entry:

- 1 Display the record to modify.
- 2 Click the menu link in the row of the record to be modified. Clicking the link displays the edit screen.
- 3 Enter data into the appropriate fields. Fields that do not allow change are indicated by a second alternate color.
- 4 Click Save to commit the changes.

♦ See field descriptions starting on page 102.

Specials Maintenance

Specials (often referred to as promotions) are groups of items administrators want to feature to customers when they visit a QAD CSS site. Specials are an optional feature of QAD CSS and implemented in the Order Entry 2 process. Specials can be selectively offered to specific marketing groups and have specific start and end dates.

Note In an MFG/PRO eB2.1 implementation, specials—as well as the items they reference—are domain specific. You must indicate which data source (domain) each special is associated with.

Due to the highly custom business nature of promotions, it is likely the business rules that control the specials display are customized.

This function is an important part of customizing QAD CSS to promote revenue growth.

Fig. 2.47
Special Displayed
in Order Entry 2



The menu location of Specials Maintenance is Home Menu|Administration Menu|Specials Maintenance.

Clicking the Specials Maintenance menu option displays the screen in Figure 2.48.

Fig. 2.48
Specials
Maintenance

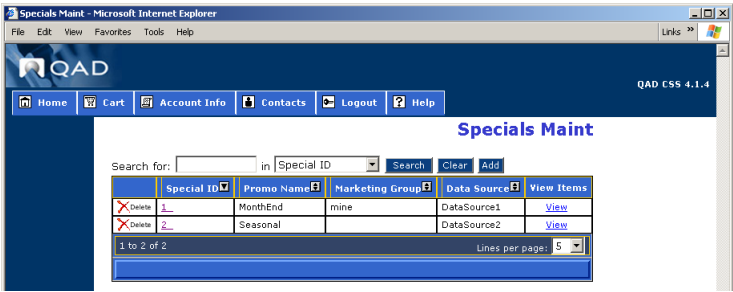


Table 2.12 summarizes the contents of the Specials Maintenance navigation screen.

Table 2.12
Specials
Maintenance
Navigation

Column	Search	Search Type	Sort	Description	Link
Special ID	Y	Greater than or equal to	Y	Unique identifier for this promotion.	Y
Promo Name	Y	Begins	Y	Name of the promotion.	N

Column	Search	Search Type	Sort	Description	Link
Marketing Group	Y	Begins	Y	The marketing group ID to which the promotion is targeted. Users assigned to this marketing group can be presented items for this promotion. Leave this field blank to allow all users to participate in this promotion.	N
Data Source	Y	Begins	Y	The source domain in an eB2.1 database for the items associated with this special.	
View Items	N	n/a	N	Hyperlink to the Special Detail Maintenance function.	Y

Related QAD CSS functions:

- Order Entry 2
- User Maintenance

▶ See page 66.

Adding a Specials Entry

The Add function of Specials Maintenance lets an administrator add custom specials documents and associate them with specific QAD CSS pages. The following information is required to complete this process:

- The name and number of the new promotion
- In MFG/PRO eB2.1, the data source that identifies the domain with the items on the special
- The type of promotion and the valid target marketing group
- The dates and times to run the promotion

To create a new entry:

- 1 Click Add in the navigation window to display the edit screen in Add mode.
- 2 Enter data into the appropriate fields.
- 3 Click Add in the edit window to save the record.

Fig. 2.49
Detail Special
Master Edit

Promotion ID. Enter a unique identifier for this promotion.

Data Source. In an MFG/PRO eB2.1 installation, choose the domain that this special is associated with.

Note This field does not display in MFG/PRO eB2 implementations.

Promotion Name. Enter the descriptive name of the promotion.

Type of Promotion. Enter a brief description that helps identify the promotion.

Target Marketing Group. Optionally, enter the ID of a marketing group to which the promotion is targeted. Users assigned to this marketing group can be presented items for this promotion. Leave this field blank to allow all users to participate in this promotion. Marketing groups should be previously set up in User Maintenance.

This Promotion should run from/To. The date range of the promotion. Promotions can be scheduled to appear at a future date. Requires a valid date divided by slashes (00/00/00) or dashes (00-00-00).

... during these times of day. Use the selection lists to enter the times of day the promotion should run. For instance, promotions can be scheduled to appear only in the morning.

Clicking a command button executes one of the following actions:

- Add saves the new record to the database. All required fields—indicated by alternate field color—must be populated prior to saving a record. Before saving, the system verifies that the record is unique and displays an error if it is not.

See “Detail User Registration Editor” on page 66 for details on creating and maintaining marketing groups.

- Cancel closes the window without adding the record.

Modifying a Specials Entry

The Modify function of Specials Maintenance lets an administrator modify existing specials entries. Requirements for adding a record are the same as for editing a record.

To modify an entry:

- 1 Display the record to modify.
- 2 Click the Special ID link in the row of the record to be modified. Clicking the link displays the edit screen.
- 3 Enter data into the appropriate fields. Fields that do not allow change are indicated by a second alternate color.
- 4 Click Save to commit the changes.

See field descriptions starting on page 105.

Special Detail Maintenance

Special Detail Maintenance is an extension of Specials Maintenance. This function lets administrators set up which items they want to feature to customers.

While in Specials Maintenance, you can click a View link to display items associated with the corresponding specials row.

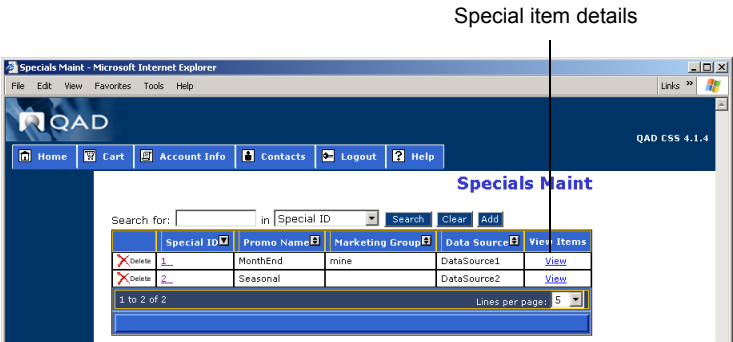


Fig. 2.50
Viewing
Promotional Items
Through Specials
Maintenance

Clicking a View link displays the screen in Figure 2.51.

Fig. 2.51
Special Detail
Maintenance

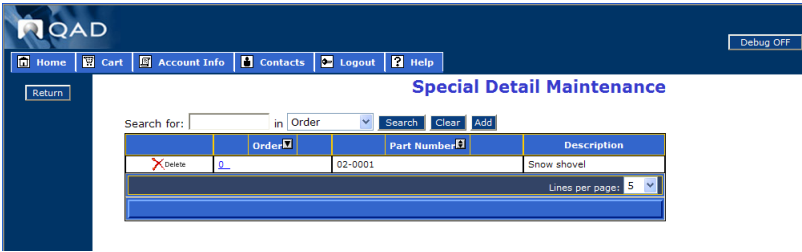


Table 2.13 summarizes the contents of the Special Detail Maintenance navigation screen.

Table 2.13
Special Detail
Maintenance
Navigation

Column	Search	Search Type	Sort	Description	Link
Order	Y	Greater than or equal to	Y	Positive or negative integer that determines the order in which the item displays relative to other special detail items.	Y
Part Number	Y	Contains	Y	Item number associated with this special.	N
Description	N	n/a	N	Brief description of the featured item.	N

Adding a Special Detail Entry

The Add function of Special Detail Maintenance lets an administrator add selected items and associate them with a specific special.

To create a new entry:

- 1 Click Add in the navigation window to display the edit screen in Add mode.
- 2 Enter data into the appropriate fields.
- 3 Click Add in the edit window to save the record.

Fig. 2.52
Detail Special
Detail Maint

Special ID. Unique identifier for this promotion.

Part Number. Specify the item number as defined in MFG/PRO.

Group Order. Enter a positive or negative integer that determines the order in which this item displays relative to other special detail items.

Short Description. Specify a brief description of this item. This description displays in bold to the right of the image associated with the item in the specials page area.

Long Description. Specify a longer text description of the item being promoted. This text wraps around the image. The price as determined by MFG/PRO and shopping cart icon display below the long description.

Image Name. Enter the relative path and file name of the item detail image file as displayed to the user.

Product Group. Specify the item category that determines where in the catalog this promotion displays. The product group corresponds to Code 0–5 as specified in Item Types Maintenance. These codes define the major product categories in the catalog layout.

♦ See “Item Types Maintenance” on page 87.

Clicking a command button executes one of the following actions:

- Add saves the new record to the database. All required fields—indicated by alternate field color—must be populated prior to saving a record. Before saving, the system verifies that the record is unique and displays an error if it is not.
- Cancel closes the window without adding the record.

Modifying a Special Detail Entry

The Modify function of Special Detail Maintenance lets an administrator modify existing special detail entries. Requirements for adding a record are the same as for editing a record.

- 1 Display the record to modify.
- 2 Click the Order link in the row of the record to be modified. Clicking the link displays the edit screen.
- 3 Enter data into the appropriate fields. Fields that do not allow change are indicated by a second alternate color.
- 4 Click Save to commit the changes.

Managing Administrative Tasks

This section describes general administrative functions:

- Saved Report Maintenance
- Session Maintenance
- System Registry Maintenance

Saved Report Maintenance

▶ See Chapter 6, “Reports,” on page 217.

Use Saved Report Maintenance to delete, modify, or create custom reports. Saved reports contain the search criteria used to generate a report from a QAD CSS module. Typically, users create saved reports directly from the report function. An administrator can then copy the report for other uses or modify the report criteria. This method is recommended so that you can generate the field list and field data automatically.

The menu location of Saved Report Maintenance is Home Menu|Administration Menu|Saved Report Maintenance.

Clicking the Saved Report Maintenance menu option displays the screen in Figure 2.53.

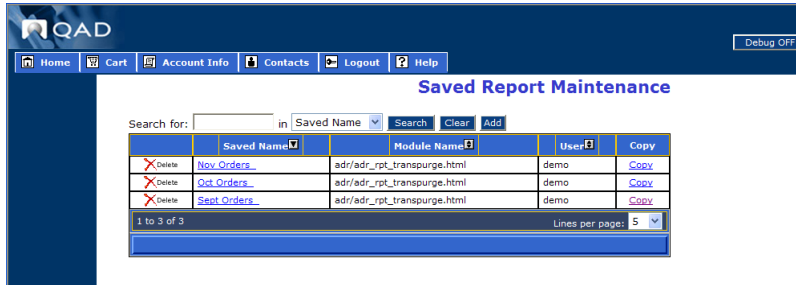


Fig. 2.53
Saved Report
Maintenance

Table 2.14 summarizes the contents of the Saved Report Maintenance navigation screen.

Column	Search	Search Type	Sort	Description	Link
Saved Name	Y	Begins	Y	Unique alphanumeric name for a saved report.	Y
Module Name	Y	Begins	Y	Name of the QAD CSS module to which the report search criteria applies.	N
User	Y	Begins	Y	Unique identifier for the user allowed to access the report.	N

Table 2.14
Saved Report
Maintenance
Navigation

Related QAD CSS functions:

- All QAD CSS reports

See Chapter 6,
“Reports,” on
page 217.

Adding a Saved Report Entry

The Add function of Saved Report Maintenance lets an administrator save a defined set of report search criteria.

Note It is recommended that you save the search criteria for a report in the report navigation screen.

To create a new entry:

- 1 Click Add in the navigation window to display the edit screen in Add mode.
- 2 Enter data into the appropriate fields.
- 3 Click Save in the edit window to save the record.

Fig. 2.54
Detail Saved
Report
Maintenance

Version: ex 4.1

User Name: demo

Customer Number: 90000001

Module Name: adr/adr_rpe_pagetracking.html

Saved Name: ClientPage1

Field List: cust_from,cust_to,date_from,date_to,

Field Data: 01000,01200,,,user1,user23,1,true

Save Cancel

Version. QAD CSS version for the saved report.

User Name. Unique identifier for a user. Only this user will be able to view this saved report from the report navigation screen.

Customer Number. Unique identifier for a customer associated with this user.

Module Name. Name of the calling page for the QAD CSS module this report will be run against.

Saved Name. Unique name for the saved report. Name must be no more than 25 characters long and cannot start with a number.

Field List. List the fields used for the search criteria, separated by commas. Do not enter spaces; for example, cust_from,cust_to.

Field Data. List the field search data, separated by commas, corresponding to the fields entered in Field List. If you do not want to limit the search for a particular field, do not enter any search data between the two commas; for example: 000001,,.

Clicking a command button executes one of the following actions:

- Add saves the new record to the database. All required fields—indicated by alternate field color—must be populated prior to saving a record. Before saving, the system verifies that the record is unique and displays an error if it is not.
- Cancel closes the window without adding the record.

After a report is saved, the saved name is added to the report navigation screen that corresponds to the QAD CSS module name. The saved report is only displayed for the user specified in the saved report.

Modifying a Saved Report Entry

The Modify function of Saved Report Maintenance lets an administrator modify existing saved report entries. Requirements for adding a record are the same as for editing a record.

To modify an entry:

- 1 Display the record to modify.
- 2 Click the Saved Name link in the row of the record to be modified. Clicking the link displays the edit screen.
- 3 Enter data into the appropriate fields. Fields that do not allow change are indicated by a second alternate color.
- 4 Click Save to commit the changes.

Copying a Saved Report Entry

The Copy function in Saved Report Maintenance lets an administrator copy, modify, and save an existing saved report as a new saved report. Requirements for adding a record are the same as for copying a record.

To copy an entry:

- 1 Display the record to modify.
- 2 Click the Copy link in the row of the record to be copied. Clicking the link displays the edit screen.

- 3 Modify data in the appropriate fields. Make sure you update the Saved Name field.
- 4 Click Save in the edit window to save the record.

Session Maintenance

When a user signs in to a QAD CSS Web site, the system identifies the user and assigns a unique session number. This session ID allows QAD CSS to track and store information about the user’s activities while in the site.

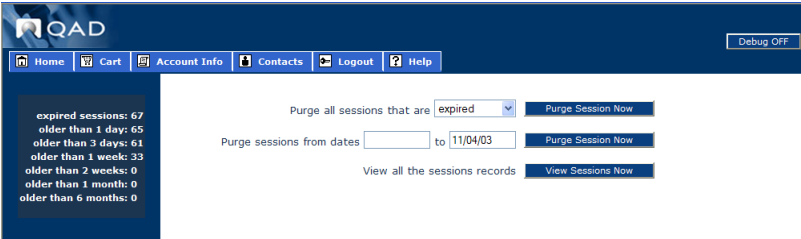
The Session Maintenance function lets administrators view all session records and their related transactions. Administrators are able to monitor sessions and terminate active or abandoned sessions. It is recommended to periodically review and purge abandoned sessions records.

Session detail can be important in diagnosing and troubleshooting issues reported by users.

The menu location of Session Maintenance is Home Menu|Administration Menu|Session Maintenance.

Clicking the Session Maintenance menu option displays the screen in Figure 2.55.

Fig. 2.55
Session
Maintenance



The key screen components of the Session Maintenance navigation screen are:

Session Summary. The left column lists a summary of options available in the purge selection list drop-down.

Purge all sessions that are. Choose the group of session records to purge or view: expired, 1 day old, 3 days old, 1 week old, 1 week old, 2 weeks old, 1 month old, 6 months old. Then click Purge Session Now to permanently delete the session records based on the value of the list.

Purge sessions from/to dates. Specify a range of dates for selecting session records to purge. Then click Purge Session Now to permanently delete the session records based on the date range.

View Sessions Now Button. Click to display a list the session records based on the value of the purge selection list.

Purging Session Records

There are three methods of purging session records.

Important Purging an active session will terminate a user's connection.

Method 1: Purge all sessions that are expired

- 1 Select a range of sessions from the drop-down menu (1 day old, 3 days old, 1 week old, 2 weeks old, 1 month old, or 6 months old).
- 2 Click the adjacent Purge Session Now button. A confirmation window displays.
- 3 Click OK to delete the corresponding session and all related records from the session table.

Method 2: Purge all sessions for a specific date range

- 1 Enter a valid from date.
- 2 Verify the to date.
- 3 Click the adjacent Purge Session Now button. A confirmation window displays.
- 4 Click OK to delete the corresponding records from the session table.

Method 3: View all the session records and select individual sessions to purge

Abandoned sessions will automatically be selected to delete.

Important The display line that is presented in bold represents the administrator currently operating this function. Do not delete this line, or your session will be immediately terminated.

Clicking View Sessions Now displays the screen shown in Figure 2.56.

Fig. 2.56
Viewing All
Session Records

Delete?	Session ID	User ID	Customer	Page Visited	Access Date	Access Time
☐	cralcadllVxfacaa			lg/ig_login.html	02/18/02	06:01
☐	kyYkgDkldjXlknc			lg/ig_login.html	02/18/02	08:22
☒	dJbOnpjhhdhdkfi			lg/ig_login.html	02/14/02	09:39
☒	jcikktcbkhPocnm			lg/ig_login.html	02/08/02	11:30
☐	batJkqkDTrkUZSku	binke	90000001	ad/adm_bcuserpersonal.html	02/18/02	08:16
☐	icijafWyhlNjfk	binke	1001000	ad/ad_edt_pdatatrans.html	02/18/02	08:21
☐	bKvwdhcarjalBZp	binke	1001000	ad/ad_edt_usermessage.html	02/18/02	08:33
☐	ceOObggdblkdlle	binke	1001000	ad/ad_mnt_session.html	02/18/02	11:08
☒	jnijcfaprdjrwiln	demo	1001000	ad/ad_mnt_super.html	02/07/02	09:30
☒	koqkcNjtGpcimkaf	demo	1001000	op/op_rpt_orderpurchase.html	02/05/02	11:24
☒	adkbjUapfiasOnQl	demo	1001000	ad/ad_mnt_usermstr.html	02/12/02	11:30
☒	kYlddmlkjaajaf	demo	90000001	rp/rp_rpt_ctriframe.html	02/11/02	13:43
☒	kjdcVclnaDeSfa	demo	1001000	op/op_hdodisplay.html	02/05/02	14:27
☒	wpMdtjyailFalld	demo	1001000	op/op_templatesave.html	02/06/02	15:05
☒	lgjMMWxczahniiH	demo	1001000	ad/ad_mnt_controltable.html	02/12/02	15:05

Note The currently active session is in bold.

Sort By selection list. This allows the administrator to sort session records by user ID, customer association, and last access date.

This screen displays a list of sessions with columns as described in Table 2.15.

Table 2.15
Sorting Session
Records

Column	Description
Delete check box	A check identifies this session record for deletion.
Session ID	A unique identifier for this session. This link generates a summary transaction report for this session.

Column	Description
User ID	The log-in user ID.
Customer Number	The last selected customer number value chosen by the user.
Page Visited	The last QAD CSS module visited.
Access Date/Time	The last date and time the session record was updated.

To delete records from the session view list:

- 1 Select the check box of the corresponding rows to delete.
- 2 Click the Purge Selected Session button.
- 3 Click OK in the confirmation window.

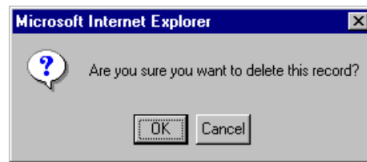


Fig. 2.57
Selection
Confirmation

It is also possible to view more details about specific sessions from here.

Note Method 3 is often used for troubleshooting, while methods 1 and 2 reflect standard maintenance.

Related QAD CSS functions:

- Transaction History Report

▶ See page 252.

System Registry Maintenance

QAD CSS has been designed with built-in flexibility, making it possible to easily accommodate varying business requirements. This flexibility is achieved through the *system registry*, which is a virtual control table consisting of key value pairs. You use these keys to establish how QAD CSS dynamically interprets and processes business rules.

More than 200 settings affect every aspect of system processing from how users log in to what displays in the catalog and how an order is submitted.

▶ See Appendix A, “Registry Settings,” on page 260 for a list of all settings.

Customizing Settings

The system registry in QAD CSS is more than just a set of simple on-and-off switches that affect system processing. Unlike other control tables, the system registry lets you tailor QAD CSS functionality for specific users or groups of users. Every registry setting is fully qualified by a key (the setting name), the value, and an ID. You can use the ID field to customize the Web site behavior at a very detailed level.

Each user always has at least three IDs:

- An individual user ID that identifies information unique to the user, such as e-mail address and phone number.
- A customer ID, identifying the organization that will receive the items being ordered. A user can be associated with more than one customer; for example, distributors may enter orders for multiple customers. During log-in, a user with multiple customer associations selects the customer to use for the current session.
- A security group, assigned when the user was defined. Security groups are defined in Security Group Maintenance and can be associated with menus, menu buttons, and users. The security group determines what menu choices users have when they log in.

Note In a B2C environment, users do not identify themselves initially. The user ID, customer ID, and security group are defined globally based on a special B2C user account.

Each user can also be associated with two other optional ID values:

- Customer groups are assigned to customers in Customer Maintenance. If settings are defined by customer group, the user inherits the group from the customer value.
- Marketing groups can be assigned to users in User Maintenance. Users can be associated with more than one marketing group. Marketing groups are used to implement special promotions, which can be targeted to one or more marketing groups. Welcome messages can also be tailored for one or more marketing groups.

All of the system registry values can vary based on any one of these five ID values. When the system needs to obtain the value for a specific key, it first collects all ID values associated with the current user. It then recursively evaluates all the matching ID values to determine the final value of the lowest key. IDs are evaluated in the following order:

- 1 Customer group
- 2 Marketing group
- 3 Security group
- 4 Customer number
- 5 User ID

For convenience and organization, registry keys include a module and version descriptor. This lets you organize keys into logical or functional areas.

For optimization purposes, you can indicate whether to limit the recursive search for a match by specifying an override value. When override is not allowed, the system uses the value it has found without continuing its search.

The override setting is critical in implementing a waterfall system of settings where you might want all members of the OEM customer group except for customer 1003 to see a certain catalog layout. In this case you must ensure that Override is set to Yes for all of the custom settings that you create for customer group Retail so that the system continues to look for the record set up for customer 1003.

Important The system always looks at the record for a blank ID first. If Override is set to No on this record, no other values are found. You must ensure that the default registry setting for Override is set correctly to accommodate your implementation planning; otherwise, you may have unexpected results.

Example You want to tailor the setting of *indexOrderHome* for members of the B2C security group. You already have a value tailored for customer group Retail. You must set the Override field to Yes on the registry setting for Retail so that the system continues searching until it finds the setting for security group B2C. Set the Override field to No on the security group

setting to ensure that this value is used even when values are also set for customer number or user ID. Also set the Override field to Yes for the records with no ID to ensure that the system looks for your custom settings.

Note Through the registry you can add and change registry keys. Contact QAD Global Services for implementation of new keys.

Important Avoid deleting global registry keys.

System Registry Screen Details

The System Registry Maintenance function location is Home Menu|Administration Menu|System Registry Maintenance.

Clicking the System Registry Maintenance menu option displays the screen in Figure 2.58.

Fig. 2.58
System Registry
Maintenance

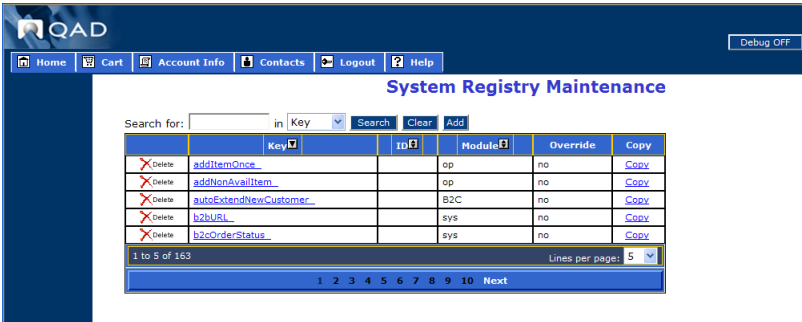


Table 2.16 summarizes the contents of the System Registry Maintenance navigation screen.

Table 2.16
System Registry
Maintenance
Navigation

Column	Search	Search Type	Sort	Description	Link
Key	Y	Begins	Y	A system registry key name.	Y
ID	Y	Begins	Y	This is the link between the registry key value and the QAD CSS business rule. - Blank: Specifies a global registry key. - Nonblank: Represents a custom override of registry value.	N

Column	Search	Search Type	Sort	Description	Link
Module	Y	Begins	Y	Defines a group of registry keys related to QAD CSS product modules: • B2C – Business-to-Customer • OP – Order Processing • CC – Credit Card • SYS – Core QAD CSS	N
Override	N	n/a	N	Determines if the system should continue to look for a matching value for this key (Override Yes) or stop with this value (Override No).	N
Copy	N	n/a	N	Duplicates the existing key to easily create new registry keys.	Y

Note The module, key, and ID fields comprise a unique index in the System Registry table wpro_registry.

Related QAD CSS functions:

- System Registry Report

▶ See page 248.

Adding a New Registry Key

The Add function of System Registry Maintenance lets an administrator add registry keys to QAD CSS.

To create a new registry key:

- 1 Click Add in the navigation window to display the Detail Edit Registry screen in Add mode.
- 2 Enter data into the appropriate fields.
- 3 Click Add to commit this function.

Fig. 2.59
Detail Edit Registry

Module. Defines a group of registry keys related to QAD CSS product modules or custom enhancements.

- B2C – Business-to-Customer
- OP – Order Processing
- CC – Credit Card
- SYS – Core QAD CSS

ID. This is the link between the registry key value and the QAD CSS business rule.

Leave blank for this registry key value to apply regardless of a user's set of associated IDs.

Specify an ID value if you want to implement a specific key value for a particular user group. You can specify:

- Customer group
- Marketing group
- Security group
- Customer number
- User ID

Override. This setting determines if this registry key entry can be overridden by another registry key with the same key name.

No: Use this value and do not look for a more specific value.

Yes: Continue to look for a more specific value and only use this value if a more specific value is not found.

Key. The system registry key name.

Key Value. Value of the registry key.

Usage. A help text description of registry usage.

Clicking a command button executes one of the following actions:

- Add saves the new record to the database in the wpro_registry table. All required fields—indicated by alternate field color—must be populated prior to saving a record. Before saving, the system verifies that the record is unique and displays an error if it is not.
- Cancel closes the window without adding the record.

Modifying a System Registry Key

The Modify function of System Registry Maintenance lets an administrator modify existing registry keys.

To modify a registry key:

- 1 Display the registry key to modify.
- 2 Click the Key link in the row of the function you want to modify.
- 3 Enter data into the appropriate fields. Fields that do not allow change are indicated by a second alternate color.
- 4 Click Save to commit your changes.

▶ See field descriptions starting on page 121.

Copying a System Registry Key

Use the Copy function to quickly copy, modify, and save new registry keys. You typically do this if you want to change a global key value for a specific customer group, marketing group, or security group.

To copy a system registry key:

- 1 Display the registry key to copy.
- 2 Click the Copy link in the row of the function you want to copy.
- 3 Enter data into the appropriate fields.
- 4 Click Save to commit your changes. The new registry key can now be seen in the System Registry Maintenance screen.

System Control

This chapter describes the use of QAD CSS functions that control internal system processing and integration with external systems.

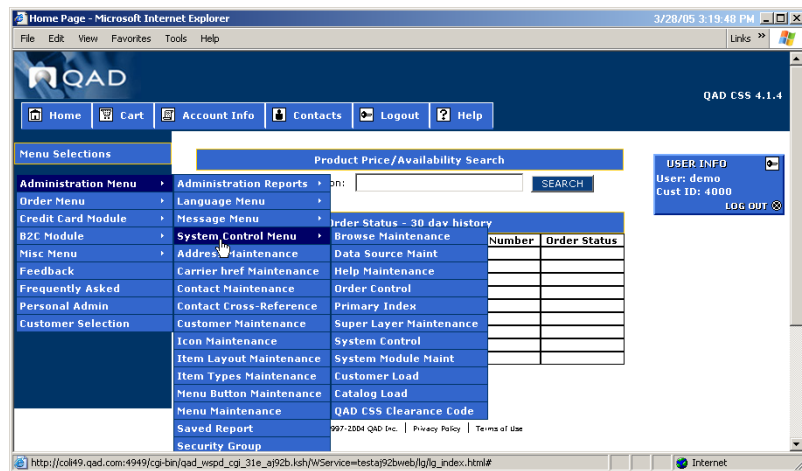
<i>Introduction</i>	126
<i>Browse Maintenance</i>	127
<i>Data Source Maintenance</i>	131
<i>Dynamic Temp-Table Map Maintenance</i>	134
<i>Help Maintenance</i>	137
<i>Order Control Maintenance</i>	141
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<i>System Control Maintenance</i>	152
<i>System Module Maintenance</i>	156
<i>QAD CSS Clearance Code</i>	165

Introduction

System control functions let you modify aspects of how QAD CSS works and integrates with your system.

The menu location of system control functions is Home Menu|Administration Menu|System Control Menu.

Fig. 3.1
QAD CSS System
Control Menu



System control functions include:

- Browse Maintenance is used to edit and configure QAD CSS browses.
- Data Source Maintenance defines valid domains for items and customers in an MFG/PRO eB2.1 environment.
- Dynamic Temp-Table Map (dtmap) Maintenance defines data forms that provide communication between the objects in each tier of the the QAD CSS platform.
- Help Maintenance associates HTML help documents with specific QAD CSS pages.
- Order Control provides a series of global configuration options to drive the business rule processing of order entry.
- Primary Index establishes primary key definitions for QAD CSS maintenance modules and internal data translation relationships

- Super Layer Maintenance allows developers and implementers to establish the architectural layers of common procedures and functions and their relationship to each other.
- System Control provides a series of global configuration options to drive the internal system processing of QAD CSS.
- System Module Maintenance sets the attributes that control the appearance and behavior of QAD CSS modules.
- Catalog Load lets implementors load item information exported from MFG/PRO using an Excel spreadsheet.
- Customer Load lets implementors load customer information exported from MFG/PRO using an Excel spreadsheet.
- QAD CSS Clearance Code lets administrators view clearance information for their implementation of QAD CSS.

▶ See *Implementation Guide: QAD Customer Self Service* for details on load functions.

▶ See “Menu Maintenance” on page 97 for details on menu setup and security.

System control maintenance functions are available only to users with authority to access these functions.

Note Consider restricting access to authorized administrators or individuals with the specific responsibility for setting up system options.

Browse Maintenance

The Browse Maintenance function lets administrators edit and configure QAD CSS browses. Browses appear throughout QAD CSS and are typically lists that are or can become too large for drop-down menus. The applicable browse documents display when a user clicks the browse icon associated with a field. Other icons perform different functions such as language translations and search.

Administrators need to develop the HTML browse content before using this function. Browse documents are stored in the QAD CSS browse directory. You can develop the documents using any HTML editor, including Progress WebSpeed. Administrators can also choose to develop documents using QAD CSS objects. This approach allows style classes and other look-and-feel attributes to be inherited from the application, ensuring that their appearance is consistent with the rest of the application.

Fig. 3.2
Browse Function in
User Maintenance
Fields

Browse icon

QAD

Home Cart Account Info Contacts Logout Help Debug OFF

User Maintenance

User ID

User Name

Description

Email Address

Contact Phone Number Ext

User Language

Password

Confirm Password

Secret Question

Secret Answer

Password Expire Date

Force password change on next login? ☐

Disable Account? ☐

External Admin? ☐

The menu location of Browse Maintenance is Home Menu|Administration Menu|System Control Menu|Browse Maintenance.

Clicking the Browse Maintenance menu option displays the screen in Figure 3.3.

Fig. 3.3
Browse
Maintenance

QAD

Home Cart Account Info Contacts Logout Help Debug OFF

Browse Maintenance

Search for: in

	Browse Name	Browse Module	Browse Title	Copy
	AddressCity...	cm/cm_edt_cm_mstr.html	City	Copy
	AddressCity...	so/so_edt_admstr.html	City	Copy
	AddressCountry...	cm/cm_edt_cm_mstr.html	Country	Copy
	AddressCountry...	lg/lg_edt_ralcompanyinfo.html	Country	Copy
	AddressCountry...	so/so_edt_admstr.html	Country	Copy

1 to 5 of 262 Lines per page:

1 2 3 4 5 6 7 8 9 10 Next

Table 3.1 summarizes the contents of the Browse Maintenance navigation screen.

Column	Search	Search Type	Sort	Description	Link
Browse Name	Y	Begins	Y	Name of the browse.	Y
Browse Module	Y	Begins	Y	Module in which the browse is used.	N
Browse Title	Y	Begins	Y	Title to be displayed when using browse.	N
Copy	N	n/a	N	Copy the setting of a browse into a new browse.	Y

Table 3.1
Browse
Maintenance
Navigation

Related QAD CSS functions:

- Browse Master Report ▶ See page 237.
- Security Group Maintenance ▶ See page 58.
- Menu Button Maintenance ▶ See page 92.
- Menu Maintenance ▶ See page 97.
- System Module Maintenance ▶ See page 156.

Adding a Browse Entry

The Add function of Browse Maintenance lets an administrator add custom browse documents and associate them with specific QAD CSS pages.

To create a new entry:

- 1** Click Add in the navigation window to display the edit screen in Add mode.
- 2** Enter data into the appropriate fields.
- 3** Click Add in the edit window to save the record.

Fig. 3.4
Detail Edit Browse
Master

Detail Edit Browse Master us

Version:

Browse Module:

Browse Name:

Browse UserID:

Browse Title:

Table Name:

Query string for table:

Key search field for table:

Field type of Key:

Table sort expression:

List of labels:

List of fields:

Browse return list:

Additional fields program:

Override program name:

Version. Implemented version of QAD CSS. Different browses can be used for different installed versions.

Browse Module. Name of the page where the browse icon will appear.

Browse Name. Unique name for the browse.

Browse UserID. Not yet implemented. This permits browses specific to users.

Browse Title. Text for the title bar in the browse pop-up window.

Table Name. Name of the table that is the source for the browse data.

Query string for table. Modification to the query. Narrows the results. Must be in proper Progress syntax.

Key search field for table. Field name. Text provided by the browse will be applied to find this field.

Field type of Key. Type of field against which the search will be placed.

Table sort expression. Modification to the query. Narrows the results. Must be in proper Progress syntax.

List of labels. List of labels to be used in the browse columns. Results will be blank if not populated.

List of fields. List of fields in the order that will be displayed when browsed. Must be in proper Progress syntax.

Browse return list. Field objects in the calling page that will be populated with data from the browse.

Additional fields program. Program or code to execute an add column to the browse. Normally used to join other tables to the query.

Override program name. Program that can be executed whenever this browse is called. Must follow standard API for interacting with browses.

Clicking a command button executes one of the following actions:

- Add saves the new record to the database. All required fields—indicated by alternate field color—must be populated prior to saving a record. Before saving, the system verifies that the record is unique and displays an error if it is not.
- Cancel closes the window without adding the record.

Modifying a Browse Entry

The Modify function of Browse Maintenance lets an administrator modify existing Browse entries. Requirements for adding a record are the same as for editing a record.

To modify an entry:

- 1 Display the record to modify.
- 2 Click the Browse Name link in the row of the record to be modified. Clicking the link displays the edit screen.
- 3 Enter data into the appropriate fields. Fields that do not allow change are indicated by a second alternate color.
- 4 Click Save to commit the changes.

▶ See field descriptions starting on page 129.

Data Source Maintenance

The Data Source Maintenance function lets administrators define the valid domains that can be associated with users and items in an MFG/PRO eB2.1 environment. Each domain in an MFG/PRO eB2.1 database represents a single business operation with distinct operational

requirements and settings. While an MFG/PRO eB2.1 database can have any number of domains, you may want to place orders through QAD CSS that affect only a subset of these domains.

The menu location of Data Source Maintenance is Home Menu|Administration Menu|System Control Menu|Data Source Maintenance.

Clicking the Data Source Maintenance menu option displays the screen in Figure 3.5.

Fig. 3.5
Data Source
Maintenance

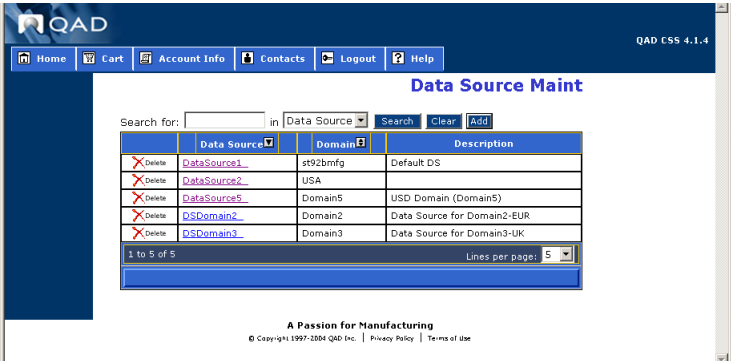


Table 3.2 summarizes the contents of the Data Source Maintenance navigation screen.

Table 3.2
Data Source
Maintenance
Navigation

Column	Search	Search Type	Sort	Description	Link
Data Source	Y	Begins	Y	Name of the data source.	Y
Domain	Y	Begins	Y	MFG/PRO domain associated with this data source.	N
Description	N	n/a	N	Description of the data source.	N

You can specify a data source on the following QAD CSS functions:

- See page 34.
- See page 44.
- See page 47.
- See page 51.
- See page 87.
- See page 103.
- Address Maintenance
- Contact Cross-Reference Maintenance
- Customer Maintenance
- Customer Item Maintenance
- Item Types Maintenance
- Specials Maintenance

- User Maintenance ▶ See page 67.
- Order Archive Report ▶ See page 221.

In addition, you specify a domain when loading data with Customer Load and Catalog Load. These programs are described in *Implementation Guide: QAD Customer Self Service*.

Adding a Data Source Entry

The Add function of Data Source Maintenance lets an administrator add data sources and associate them with specific MFG/PRO domains.

To create a new entry:

- 1 Click Add in the navigation window to display the edit screen in Add mode.
- 2 Enter data into the appropriate fields.
- 3 Click Add in the edit window to save the record.

Fig. 3.6
Detail Data Source
Edit

Data Source. Specify a code (maximum 8 characters) that identifies a data source. To avoid confusion, you may want to name your data sources the same as the MFG/PRO domains that they represent.

Description. Specify a brief description (maximum 24 characters) of this data source to display in lookups.

Domain. Specify the name of a domain in the MFG/PRO database to be associated with this data source.

Default Data Source. Select this field for the data source you want the system to use when a default associated with the currently logged in user cannot be found.

Note This situation should never occur in normal processing, since each user must be associated with a data source.

Clicking a command button executes one of the following actions:

- Add saves the new record to the database. All required fields—indicated by alternate field color—must be populated prior to saving a record. Before saving, the system verifies that the record is unique and displays an error if it is not.
- Cancel closes the window without adding the record.

Modifying a Data Source Entry

The Modify function of Data Source Maintenance lets an administrator modify existing data source entries. Requirements for adding a record are the same as for editing a record.

To modify an entry:

- 1 Display the record to modify.
- 2 Click the Data Source link in the row of the record to be modified. Clicking the link displays the edit screen.
- 3 Enter data into the appropriate fields. Fields that do not allow change are indicated by a second alternate color.
- 4 Click Save to commit the changes.

▶ See field descriptions starting on page 133.

Dynamic Temp-Table Map Maintenance

The QAD CSS platform is designed as an N-tier modular architecture. The message component provides communication between the objects in each tier. Each message is defined as data forms (Progress temp tables). Dynamic Temp-Table Map Maintenance lets developers define those data forms.

Note Dynamic Temp-Table Map Maintenance is a developer-specific maintenance function in QAD CSS. A thorough understanding of QAD CSS development methodology is recommended before making changes in this section.

By default, this program is not available on the menu system. To add it, complete these steps:

- 1 Change the setting of On Menu in System Module Maintenance to Yes.
- 2 Use Menu Maintenance to add the program where you want it in the system. Make sure you assign the correct security.

Clicking the dtmap Maintenance menu option displays the screen in Figure 3.7.

	Table Name	Field Name	Field Type
Delete	so_mstr	so_nbr	character
Delete	so_mstr	so_cust	character
Delete	so_mstr	so_bill	character

Fig. 3.7
Dynamic Temp-Table Map (dtmap) Maintenance

Table 3.3 summarizes the contents of the Dynamic Temp-Table Map Maintenance navigation screen.

Column	Search	Search Type	Sort	Description	Link
Table Name	Y	Begins	Y	The data form name.	Y
Field Name	Y	Begins	Y	The field name in the data form.	N
Field Type	N	n/a	N	The data type definition of the field, such as character, integer.	N

Table 3.3
Dynamic Temp-Table Map (dtmap) Maintenance Navigation

Adding a Dynamic Table Map Entry

The Add function of Dynamic Table Map Maintenance allows a developer to add data forms. The data form design is required to complete this process.

To create a new entry:

- 1 Click Add in the navigation window to display the edit screen in Add mode.
- 2 Enter data into the appropriate fields.
- 3 Click Add in the edit window to save the record.

Fig. 3.8
Detail Edit dtMap

Table Name:	so_mstr
Field Name:	so_nbr
Field Type:	character
Field Extent:	1
Field Format:	x(12)
Column Label:	
Initial Value:	
Field Label:	
Frame Sequence:	1

Add Cancel

Table Name. The data form name.

Field Name. The field name in the data form.

Field Type. The data type definition of the field; for example, character, integer.

Field Extent. The number of entries in an array structure. A value greater than 1 specifies this data field as an array.

Field Format. Display format that specifies the default display attributes of this data field.

Column Label. Default column heading label for this data field.

Initial Value. Initial value for this data field.

Field Label. Default label for this data field.

Frame Sequence. The field order of this data field in relation to the other data fields in the data form. This is only editable when in Add mode.

Clicking a command button executes one of the following actions:

- Add saves the new record to the database. All required fields—indicated by alternate field color—must be populated prior to saving a record. Before saving, the system verifies that the record is unique and displays an error if it is not.
- Cancel closes the window without adding the record.

Modifying a Dynamic Table Map Entry

The Modify function of Dynamic Table Map Maintenance lets an administrator modify existing dynamic table map entries. Requirements for adding a record are the same as for editing a record.

To modify an entry:

- 1 Display the record to modify.
- 2 Click the Table Name link in the row of the record to be modified. Clicking the link displays the edit screen.
- 3 Enter data into the appropriate fields. Fields that do not allow change are indicated by a second alternate color.
- 4 Click Save to commit the changes.

▶ See field descriptions starting on page 135.

Help Maintenance

The QAD CSS Help Maintenance function lets administrators associate HTML help documents with specific QAD CSS pages. The applicable help documents display when the user clicks Help on the default QAD CSS menu bar.

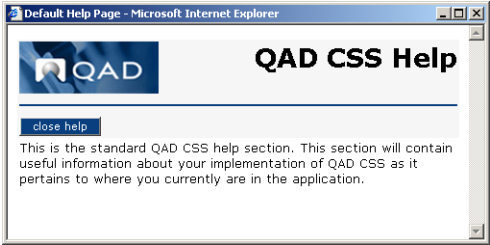
The Help button, as with all other menu bar items, is maintained through the Menu Button Maintenance function. When invoked, the help document is displayed in a new browser window.

▶ See “Menu Button Maintenance” on page 92.

Administrators must develop the HTML help content before using this function. Help documents are stored in the QAD CSS help directory. The documents can be developed using any HTML editor, including Progress WebSpeed. Administrators can also choose to develop documents using

QAD CSS objects. This approach allows style classes and other look-and-feel attributes to be inherited from the application. This ensures the help documents appear consistent with the rest of the application.

Fig. 3.9
Help Topics



The menu location of Help Maintenance is Home Menu|Administration Menu|System Control Menu|Help Maintenance.

Clicking the Help Maintenance menu option displays the screen in Figure 3.10.

Fig. 3.10
Help Maintenance

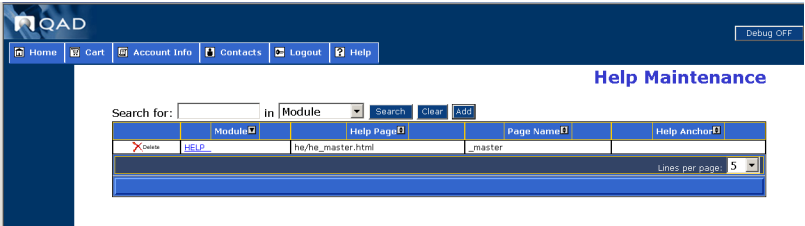


Table 3.4 summarizes the contents of the Help Maintenance navigation screen.

Column	Search	Search Type	Sort	Description	Link
Module	Y	Begins	Y	A unique identifier that is used by QAD CSS to reference the specific relationship between the QAD CSS page and the HTML help document; for example, Home. This allows names that are functionally meaningful to describe the relationship.	Y
Help Page	Y	Begins	Y	The relative path for the help page under the QAD CSS help directory; for example: hp/hp_help.html.	N
Page Name	Y	Begins	Y	The QAD CSS page associated with the help document that is defined in the help page column; for example, lg/lg_index.html (default home page) is linked to hp/hp_help.html.	N
Help Anchor	Y	Begins	Y	HTML anchor tag name in the HTML help page.	N

Table 3.4
Help Maintenance
Navigation

Related QAD CSS functions:

- Security Group Maintenance ▶ See page 58.
- Menu Button Maintenance ▶ See page 92.
- Menu Maintenance ▶ See page 97.
- System Module Maintenance ▶ See page 156.

Adding a Help Entry

The Add function of Help Maintenance lets an administrator add custom help documents and associate them with specific QAD CSS pages. The following information is required to complete this process:

- The name and location of the *.html file of the help document

- The QAD CSS module associated the HTML help document
- The meaningful unique name to identify this association

To create a new entry:

- 1 Click Add in the navigation window to display the edit screen in Add mode.
- 2 Enter data into the appropriate fields.
- 3 Click Add in the edit window to save the record.

Fig. 3.11
Detail Edit Help

The screenshot shows a web browser window titled 'Edit Help - Microsoft Internet Explorer'. Inside the browser is a form titled 'Detail Edit Help'. The form has the following fields and values:

- QAD CSS Page Name:
- Module:
- Help File Name:
- Anchor:

At the bottom of the form are two buttons: 'Add' and 'Cancel'.

QAD CSS Page Name. Specify the name of the page within QAD CSS you want to associate with a help topic; for example, `op/op_index.html`.

Module. A unique identifier that is used by QAD CSS to reference the specific relationship between the QAD CSS page and the HTML help document; for example, `Home`.

Help File Name. The relative path and file name of the HTML document containing the help content that should display for the page specified in QAD CSS Page Name; for example, `he/he_master.html`.

Anchor. HTML anchor tag name in the HTML help page, used to display the page at a specific point.

Clicking a command button executes one of the following action:

- Add saves the new record to the database in the `wpro_help` table. All required fields—indicated by alternate field color—must be populated prior to saving a record. Before saving, the system verifies that the record is unique and displays an error if it is not.

- Cancel closes the window without adding the record.

Modifying a Help Entry

The Modify function of Help Maintenance lets an administrator modify existing help entries. Requirements for adding a record are the same as for editing a record.

To modify an entry:

- 1 Display the record to modify.
- 2 Click the Module link in the row of the record to be modified. Clicking the link displays the edit screen.
- 3 Enter data into the appropriate fields. Fields that do not allow change are indicated by a second alternate color.
- 4 Click Save to commit the changes.

▶ See field descriptions starting on page 139.

Order Control Maintenance

Every QAD CSS order-entry process can be controlled using a series of global configuration options. These options drive the business rule processing of order entry. For example, some options affect access to QAD CSS order-entry features, while others affect how QAD CSS interacts with MFG/PRO.

Note These options are typically set during product implementation. Any change should be carefully reviewed and planned as it will affect the way customers interact with the site.

See *Implementation Guide: QAD Customer Self Service* for additional details about defining your order-entry process.

This QAD CSS page has components affected by global configuration options; specifically, billing and shipping address update and browse.

Fig. 3.12
Order Entry Bill-To
and Ship-To
Addresses

Home Cart Account Info Contacts Logout Help

Next Continue Shopping Cancel

Finish Order

Order Number: bp000451 User ID: demo Order Date: 02/14/02

Bill-To Address Update

CENTURY HALLMARK 123
ACCOUNTS PAYABLE DEPARTMENT
3020 CENTURY BLVD
P.O. BOX 675
LOS ANGELES, CA 90210
United States of America

Ship-To Address Update

CENTURY HALLMARK 123
ACCOUNTS PAYABLE DEPARTMENT
3020 CENTURY BLVD
P.O. BOX 675
LOS ANGELES, CA 90210
United States of America

Payment Method: Shipping Method:

PD/REF Number (Optional):

Order Comments:

Line	Item Number	Qty	Price	Est Price
1	efstrapd	1	4.00 USD	4.00 USD
2	cw1001	1	54.99 USD	54.99 USD

Non-Taxable Total: 58.99 USD
Taxable Total: 0.00 USD

Line Total: 58.99 USD
Discount: 0.00 USD
FREIGHT: 0.00 USD
SERVICE: 0.00 USD
SPECIAL: 0.00 USD
Tax: 0.00 USD
ORDER TOTAL: 58.99 USD

The menu location of Order Control Maintenance is Home Menu|Administration Menu|System Control Menu|Order Control Maintenance.

Note Consider restricting access to individuals with the specific responsibility of controlling the QAD CSS order processing business rules.

Clicking the Order Control Maintenance menu option displays the screen in Figure 3.13.

Fig. 3.13
Order Control
Maintenance

QAD CSS 4.2.1 Debug OFF

Order Control Maintenance

Order Prefix: qa

Default Item Site:

Item Site List:

Use User ID: ☒

Post to MFG/PRO: ☒

Credit Notify at Startup: ☐

Credit Notify on Submit: ☐

Post Order When on Credit Hold: ☒

Credit Notify on Enter: ☐

Add Ship-To: ☐

Browse Ship-To: ☒

Update Bill-To: ☐

Browse Bill-To: ☐

Recover Orders: ☒

Archive Orders: ☐

Archive Incomplete Orders: ☐

Save Reset

The key screen components of the Order Control Maintenance navigation screen are:

Order Prefix. Specify a prefix for the sales order number. By using a different prefix than the one specified in MFG/PRO's Sales Order Control (7.1.24), you can easily identify orders that were placed using QAD CSS.

Default Item Site. Permits QAD CSS to override the default site assigned by MFG/PRO.

Item Site List. Permits QAD CSS to override a default list of allowable sites. This field is not used with MFG/PRO.

Use User ID. This instructs QAD CSS to use the QAD CSS user ID to identify the actual user who placed the order within MFG/PRO. See also the description of the *useUserID* registry setting.

▶ See page 282.

Post to MFG/PRO. Indicates how orders should be sent to MFG/PRO.

No: Orders are reviewed by an internal resource before they are sent to MFG/PRO. When No, a customer service representative must use Order Processing to review and then submit the order.

Yes: Orders are posted to MFG/PRO immediately after they are entered by the buyer in QAD CSS.

Credit Notify on Startup. QAD CSS has the ability to notify the user that their account is on credit hold. MFG/PRO determines whether the customer is on credit hold. Upon account log-in, the credit hold notification message will be displayed if the account is on credit hold and this option is selected. The notification message is maintained in Error Message Maintenance.

▶ See "Error Message Maintenance" on page 194.

Credit Notify on Submit. QAD CSS has the ability to notify the user that their account is on credit hold. MFG/PRO determines whether the customer is on credit hold. Upon submission of an order, the credit hold notification message will be displayed if the account is on credit hold and this option is selected. The notification message is maintained in Error Message Maintenance.

▶ See "Error Message Maintenance" on page 194.

Post Order When on Credit Hold. This field instructs QAD CSS to post an order to MFG/PRO, regardless of customer credit hold status.

Credit Notify on Enter. QAD CSS has the ability to notify the user that their account is on credit hold. MFG/PRO determines whether the customer is on credit hold. Upon starting an order, the credit hold notification message is displayed if the account is on credit hold and this option is selected.

▶ See “Error Message Maintenance” on page 194.

The notification message is maintained in Error Message Maintenance.

Add Ship-To. This field indicates that customers can add new ship-to addresses during the order-entry process. New addresses are posted for storage in MFG/PRO.

Browse Ship-To. This field indicates that customers can select from existing ship-to addresses during the order-entry process. This list can contain addresses from MFG/PRO, QAD CSS, or both.

Update Bill-To. This field indicates that customers can update bill-to addresses during the order-entry process. Modified addresses are posted for storage in MFG/PRO.

Browse Bill-To. This field indicates that customers can select from existing bill-to addresses during the order-entry process. This list can contain addresses from MFG/PRO, QAD CSS, or both.

Note Only one bill-to address is associated with an MFG/PRO customer. Therefore, you should not update the bill-to field. Further, all new and modified ship-to addresses are stored as new temporary addresses in the MFG/PRO application.

Recover Orders. When this is Yes, QAD CSS saves the order and all line items as they are entered, line by line. If the user exits an order by mistake or loses a network connection while entering the order, the system prompts them at the next log-in to resume where they were interrupted, or to begin a new order-entry session.

▶ See “Uncommitted Orders Report” on page 222.

The Uncommitted Orders Report produces a list of all incomplete and uncommitted orders. Administrators can then view and delete all orders available for recovery.

Note It is recommended that this feature remain selected.

Archive Orders. After an order is communicated to MFG/PRO, it is deleted by the system. When Archive Orders is Yes, the system keeps a copy of each order in a side table in QAD CSS after it is sent to MFG/PRO. Archived orders can be viewed and are listed on the Order Archive Report.

◆ See “Order Archive Report” on page 221.

Note You can use the system registry setting *deleteOrder* to prevent the system from deleting orders for certain users, regardless of the setting of Archive Orders.

◆ See page 265.

Archive Incomplete Orders. When this is Yes, the system archives even those orders that were not completed. None of these orders will be in MFG/PRO. Incomplete archived orders can be viewed and are listed on the Order Archive Report.

This feature is helpful to track marketing issues.

Clicking a command button executes one of the following actions:

- Save commits the changes to the database.

Note The Progress WebSpeed agents must be restarted before the changes go into effect.

- Reset returns all fields to the state prior to any changes.

Primary Index Maintenance

A primary index is a key value that identifies a database record as unique. QAD CSS stores primary index information in an internal database table for use in application development. The Primary Index Maintenance function lets developers establish primary key definitions for QAD CSS maintenance modules and internal data translation relationships. Values set up in Primary Index Maintenance must match the primary index in the physical database schema. This information is stored in a separate QAD CSS table to improve system performance and efficiency.

Figure 3.14 shows an example of how Primary Index Maintenance is integrated into Contact Maintenance. The Detail Contact Maintenance screen shows the primary index field in blue as a required field.

Fig. 3.14
Primary Index
Information in
Customer
Maintenance

Required field

QAD

Home Cart Account Info Contacts Logout Help

Debug OFF

http://col49.qad.com - Contact Maintenance - Microsoft Internet Explorer

Detail Contact Maintenance

Number: [] Type: []

First Name: [] Last Name: []

Title: []

Company: []

Phone 1: [] Phone 2: []

Fax: []

E-Mail: []

Image File: []

Comments: []

Address Line 1: []

Address Line 2: []

Address Line 3: []

City: [] State: [] Zip: []

Country: []

Add Cancel

Me	Cross Ref	Copy
Administrator	View	Copy
Manager	View	Copy
al Manager	View	Copy

Lines per page: 5

Copyright 1997-2004 QAD Inc.

The menu location of Primary Index Maintenance is Home Menu|Administration Menu|System Control Menu|Primary Index.

Note This is an advanced feature. Consider restricting access to authorized developers.

Clicking the Primary Index Maintenance menu option displays the screen in Figure 3.15.

Fig. 3.15
Primary Index
Maintenance

QAD

Home Cart Account Info Contacts Logout Help

Debug OFF

Primary Index Maintenance

Search for: [] in [Table] Search Clear Add

	Table	Field
Delete	cm_mstr	cm_addr
Delete	sod_det	sod_nbr,sod_line
Delete	so_mstr	so_nbr
Delete	wpro_activity_code	activity_code
Delete	wpro_addr	customer_number,adr_num

1 to 5 of 50

Lines per page: 5

1 2 3 4 5 6 7 8 9 10

Table 3.5 summarizes the contents of the Primary Index Maintenance navigation screen.

Column	Search	Search Type	Sort	Description	Link
Table	Y	Contains	Y	A word used to designate a database table. This table must exist in the MFG/PRO database.	Y
Field	N	n/a	N	A word used to designate a database table element. This field must exist in the MFG/PRO database table.	N

Table 3.5
Primary Index
Maintenance
Navigation

Related QAD CSS functions:

- System Registry Report

♦ See page 248.

Adding a Primary Index Entry

The Add function of Primary Index Maintenance lets an administrator add custom primary index documents and associate them with specific QAD CSS pages.

To create a new entry:

- 1 Click Add in the navigation window to display the edit screen in Add mode.
- 2 Enter data into the appropriate fields.
- 3 Click Add in the edit window to save the record.

Fig. 3.16
Detail Edit Primary
Index

Table. A word used to designate a database table. This table must exist in the QAD CSS database.

Field List. A word used to designate a database table element. This field must exist in the QAD CSS database table.

Clicking a command button executes one of the following actions:

- Add saves the new record to the database. All required fields—indicated by alternate field color—must be populated prior to saving a record. Before saving, the system verifies that the record is unique and displays an error if it is not.
- Cancel closes the window without adding the record.

Modifying a Primary Index Entry

The Modify function of Primary Index Maintenance lets an administrator modify existing primary index entries. Requirements for adding a record are the same as for editing a record.

To modify an entry:

- 1 Display the record to modify.
- 2 Click the Table link in the row of the record to be modified. Clicking the link displays the edit screen.
- 3 Enter data into the appropriate fields. Fields that do not allow change are indicated by a second alternate color.
- 4 Click Save to commit the changes.

▶ See field descriptions starting on page 147.

Super Layer Maintenance

The QAD CSS application is a collection of procedures and functions. Common procedures and functions are grouped together as architectural layers and loaded persistently on a server. The order in which these layers are loaded affects the way the application behaves and operates. Super Layer Maintenance allows developers and implementers to establish the layers and their relationships to each other.

System administrators may be required to use Super Layer Maintenance during installation or upgrades of QAD CSS modules.

Important This function should be used only when implementing a new module or function. After successful implementation, you should remove it from the menu.

The menu location of Super Layer Maintenance is Home Menu|Administration Menu|System Control Menu|Super Layer Maintenance.

Clicking the Super Layer Maintenance menu option displays the screen in Figure 3.17.

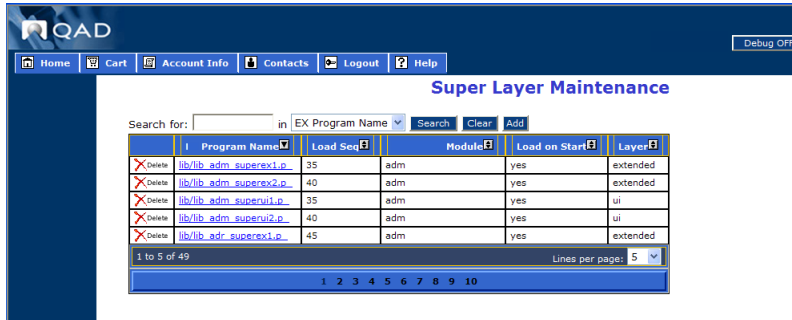


Fig. 3.17
Super Layer
Maintenance

Table 3.6 summarizes the contents of the Super Layer Maintenance navigation screen.

Column	Search	Search Type	Sort	Description	Link
Program Name	Y	Begins	Y	The physical file name of the QAD CSS program.	N
Load Sequence	Y	Equals	Y	Order that the corresponding program will be loaded into the layer.	N
QAD CSS Module	Y	Equals	Y	QAD CSS category code used to group related functions.	N
Load on Start	Y	Begins	Y	Instructs QAD CSS to load this module into the layers upon system startup.	N
Layer	Y	Equals	Y	The layer where the corresponding program will be placed: - Extended - User Interface - Adapter	N

Table 3.6
Super Layer
Maintenance
Navigation

Related QAD CSS functions:

- Super Layer Report

See page 250.

Adding a Super Layer Entry

The Add function of Super Layer Maintenance lets an administrator add custom super layer documents and associate them with specific QAD CSS pages. The following information is required to complete this process:

- The name and module of the super layer
- The load sequence and layer
- If this is to load on start of the QAD CSS agents

To create a new entry:

- 1 Click Add in the navigation window to display the edit screen in Add mode.
- 2 Enter data into the appropriate fields.
- 3 Click Add in the edit window to save the record.

Fig. 3.18
Detail Super Layer
Maintenance

The screenshot shows a web browser window titled "Super Layer Maintenance - Microsoft Internet Explorer". The main content area is titled "Detail Super Layer Maintenance". It contains a form with the following fields and values:

- Program Name: lib/lib_adm_super1.p
- QAD CSS Module: adm
- Load Seq: 35
- Load Layer: extended (dropdown menu)
- Load On Start: ☒

At the bottom of the form are two buttons: "Add" and "Cancel".

Program Name. The physical file name of the QAD CSS program.

QAD CSS Module. QAD CSS category code used to group related functions.

Load Sequence. Order that the corresponding program will be loaded into the layer.

Load Layer. Specify the layer where the corresponding program will be placed. Choices are:

- Extended
- User Interface
- Adapter

Load on Start. Instructs QAD CSS to load this module into the layers upon system startup.

Clicking a command button executes one of the following actions:

- Add saves the new record to the database. All required fields—indicated by alternate field color—must be populated prior to saving a record. Before saving, the system verifies that the record is unique and displays an error if it is not.
- Cancel closes the window without adding the record.

Modifying a Super Layer Entry

The Modify function of Super Layer Maintenance lets an administrator modify existing super layer entries. Requirements for adding a record are the same as for editing a record.

Important You should only make modifications in this program if you are sure you understand the effects.

To modify an entry:

- 1 Display the record to modify.
- 2 Click the Program Name link in the row of the record to be modified. Clicking the link displays the edit screen.
- 3 Enter data into the appropriate fields. Fields that do not allow change are indicated by a second alternate color.
- 4 Click Save to commit the changes.

♦ See field descriptions starting on page 150.

System Control Maintenance

Core QAD CSS system processes can be controlled using a series of global configuration options. These options drive the internal system processing of QAD CSS. For example, some options and settings define the location or locations of images and style sheets, e-mail attributes, session information, transaction tracking, and more.

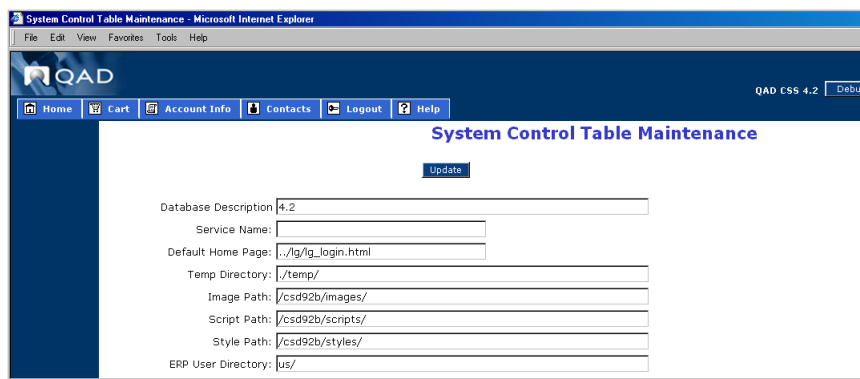
Note These options are typically set during product implementation. Changes should be carefully reviewed and planned, as they will affect the operation of QAD CSS.

The menu location of System Control Maintenance is Home Menu|Administration Menu|System Control Menu|System Control.

Note Consider restricting access to system implementers and those responsible for the technical setup of QAD CSS.

Clicking the System Control Maintenance menu option displays the screen in Figure 3.19. (Additional parts of this screen are shown in Figure 3.20 on page 154 and Figure 3.21 on page 155.)

Fig. 3.19
System Control
Table Maintenance,
Part 1



System Control Table Maintenance - Microsoft Internet Explorer

File Edit View Favorites Tools Help

QAD

Home Cart Account Info Contacts Logout Help

QAD CSS 4.2 Debug

System Control Table Maintenance

Update

Database Description: 4.2

Service Name:

Default Home Page: /lg/ig_login.html

Temp Directory: /temp/

Image Path: /csd92b/images/

Script Path: /csd92b/scripts/

Style Path: /csd92b/styles/

ERP User Directory: /us/

The key screen components of the System Control Maintenance navigation screen are:

Update button. Commits changes to the database.

Note The Progress WebSpeed agents must be restarted before the changes will go into effect.

Database Description. Text used to define this specific implementation. This text generally appears in the upper right corner of the QAD CSS screen; for example, QAD CSS 4.

Service Name. This field is not used in QAD CSS and should be left blank.

Default Home Page. The system default page displayed when a page request is denied and QAD CSS cannot determine what page to display.

Temp Directory. The physical location that QAD CSS uses to write temporary information during the operation of the Web site. This directory is on the operating system where the Progress WebSpeed agents reside. The directory path should always end with a slash or backslash, whichever is appropriate to the operating system.

You enter information for three directories: images, scripts, and style sheets. In all cases you can enter an absolute URL or a relative one. Entering a relative URL can prevent the display of security-related messages when the path is accessed from a secured page.

Note In all cases, the directory path should end with a slash (/).

Image Path. The virtual directory on the Web server where the QAD CSS images reside. For example, this directory can be defined as:

- An absolute URL (<http://www.server.com/images/>)
- A relative URL (</images/>)

Note The value of this field is set by the *images* registry setting.

Script Path. The virtual directory on the Web server where the QAD CSS JavaScript files reside. For example, this directory can be defined as:

- An absolute URL (<http://www.qadcss.com/scripts/>)
- A relative URL (</scripts/>)

Style Path. The virtual directory on the Web server where the QAD CSS HTML style sheets reside. For example, this directory can be defined as:

- An absolute URL (<http://www.qadcss.com/styles/>)

- A relative URL (/styles/)

Note The value of this field is set by the *styles* registry setting.

ERP User Directory. The directory where MFG/PRO source code is located. For a US English installation, this is *MFGPROInstallDir/US/*.

Fig. 3.20
System Control
Table Maintenance,
Part 2

E-Mail Server IP or DNS:	smtp.qad.com
E-Mail Port Number:	25
E-Mail User:	mxl@qad.com
E-Mail Type:	SMTP E-Mail Engine
Secure E-Mail Server:	☐
Secure User ID:	
Secure User ID Password:	

E-Mail Server IP or DNS. The TCP/IP or Domain Name Server (DNS) address of the e-mail server used to route e-mail messages generated by QAD CSS.

E-Mail Port Number. Port number of the SMTP server that is listening for e-mail. The default is 25.

E-Mail User. The authorized e-mail account used to access the e-mail server.

E-Mail Type. The e-mail engine for processing e-mail, either SMTP or SendMail.

Secure E-Mail Server. This field instructs QAD CSS to use the secure SMTP protocol when communicating with the e-mail server. Activating this option requires use of Secure User ID and Secure User ID Password.

Secure User ID. The secured user ID required to access the e-mail server. This is only required when Secure E-Mail Server is activated.

Secure User ID Password. The secured user ID password required to access the e-mail server. This is only required when Secure E-Mail Server is activated.

Master Contact E-Mail: Master system contact e-mail. This is used in customer care.

Master Contact Name: Master system contact name. This is used in customer care.

QAD CSS Service Name:

QAD CSS Release Level:

Control Version:

Password Expiration: Number of days before a password expires

Report Timeout Count:

Session Encoding Key: Encryption key used for generating the user's SESSION NUMBER

Session Limit: Number of user can be logged in with that ID and Password

Session Timeout Limit: Number of minutes of inactivity before the user is logged out

Keep Transaction Log: ☒

Show DB Info: ☒

Debug Flag: ☒

Extend to ERP: ☒

Fig. 3.21
System Control
Table Maintenance,
Part 3

Master Contact E-Mail. Specify the e-mail address of the administrator to receive system-generated e-mail messages. Currently, the only message automatically sent to this address notifies the administrator when the QAD CSS license is about to expire.

Master Contact Name. Specify the name of the user associated with the master contact e-mail address.

QAD CSS Service Name. This field is not currently used and should be left blank.

QAD CSS Release Level. Release number of QAD CSS. The value of this field should not be changed.

Control Version. A value used within QAD CSS to identify version-specific operations. The value of this field should not be changed.

Password Expiration. The number of days, relative to the last password change event, that the new password is valid. Set this value to 0 (zero) to not use this option.

Report Timeout Count. A value that represents the number of rows to count in a report before executing a Progress buffer flush that will send part of the report results back to the user's browser. This is designed to prevent a timeout condition in long-running reports.

Session Encoding Key. A component of encryption key used to generate session numbers.

Session Limit. Limits the number of active, concurrent sessions for a QAD CSS user account.

◆ See “Transaction History Report” on page 252.

Session Timeout Limit. The number of minutes before QAD CSS deactivates a session due to inactivity. A value of 0 (zero) indicates sessions do not time out. This is not recommended in a production environment.

Keep Transaction Log. Select this option when you want QAD CSS to log all Web site activity to a journal. You can view and clear this information using Transaction History Report.

Show DB Info. Select this option when you want QAD CSS to display the information from the database description field in the header of QAD CSS screens.

Debug Flag. Select this option when you want QAD CSS to capture additional technical information useful during development and Web site analysis.

Important Do not operate in debug mode in a production environment.

Extend to ERP. Select this option when you want QAD CSS to connect to the MFG/PRO database. This option should be selected except during initial implementation.

System Module Maintenance

The foundation of the QAD CSS user interface is HTML pages. QAD CSS refers to these HTML pages as *modules*. The appearance and behavior of each HTML page/module depends on the attributes defined in System Module Maintenance. Attributes of a QAD CSS module can include JavaScript functions, security settings, screen elements, and business rules.

When you install the system, all of the pages supplied with QAD CSS are already defined. However, you may want to remove some pages from the menus or modify some of the page parameters, especially those related to security. For example, if you are using credit cards, some pages need to use the HTTPS protocol.

Note Pages that cannot be accessed from the menus can still be accessed directly by typing in the page URL in the browser Address bar. However, the security applied in System Module Maintenance prevents this.

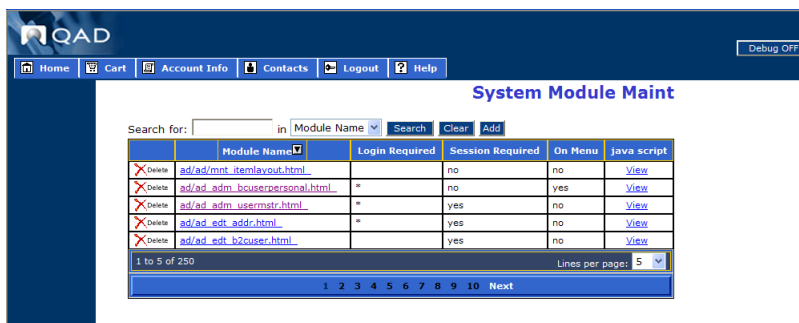
Use this program also if you create a new HTML page in QAD CSS. During the development process, the developer can return to System Module Maintenance to add, modify, or remove attributes of the new page.

Important Every page used in QAD CSS must be registered. Not all pages are accessible from the menu. You must activate the On Menu attribute when adding a new module to be accessed from the QAD CSS menu system.

Administrators may need to access System Module Maintenance during the application of patches or when expanding the capabilities of QAD CSS with additional product modules such as the QAD CSS credit card processing module.

The menu location of System Module Maintenance is Home Menu|Administration Menu|System Control Menu|System Module Maintenance.

Clicking the System Module Maintenance menu option displays the screen in Figure 3.22.



	Module Name	Login Required	Session Required	On Menu	Java Script
	ad/ad/mnt_itemlayout.html		no	no	View
	ad/ad_adm_bcouerpersonal.html	*	no	yes	View
	ad/ad_adm_usermstr.html	*	yes	no	View
	ad/ad_edt_addr.html	*	yes	no	View
	ad/ad_edt_b2ouser.html		yes	no	View

1 to 5 of 250 Lines per page: 5

1 2 3 4 5 6 7 8 9 10 Next

Fig. 3.22
System Module
Maintenance

Table 3.7 summarizes the contents of the System Module Maintenance navigation screen.

Table 3.7
System Module
Maintenance
Navigation

Column	Search	Search Type	Sort	Description	Link
Module Name	Y	Contains	Y	The unique name for this module. This is the same name as the physical QAD CSS HTML program. QAD CSS module names follow a specific naming convention. If you add your own pages, you should follow the same convention to facilitate future maintenance.	Y
Login Required	N	n/a	N	Login Required defines the class of users that can access this module. Users are associated with a specific class in User Maintenance. • <i>All</i>. Everyone can access this module. This option displays an asterisk in the Login Required column. • <i>None</i>. No one can access this module. • <i>Blank</i>. No one can access this module. • <i>Customer</i>. Only users associated with the Customer class can access this module. • <i>Vendor</i>. Only users associated with the Vendor class can access this module. • <i>Internal</i>. Only users associated with the Internal class can access this module.	N
Session Required	N	n/a	N	No: This page can be directly accessed as the first page served (accessed by a book mark) Yes: This page cannot be directly accessed as the first page without a valid session ID.	N

Column	Search	Search Type	Sort	Description	Link
On Menu	N	n/a	N	Yes: This module can be added to the QAD CSS menu in Menu Maintenance. No: This module cannot be added to the QAD CSS menu in Menu Maintenance.	N
JavaScript	N	n/a	N	The link to the JavaScript Maintenance function.	Y

Related QAD CSS functions:

- System Module Report ➤ See page 247.
- Help Maintenance ➤ See page 137.
- User Maintenance ➤ See page 66.
- Menu Maintenance ➤ See page 97.

Adding a System Module Entry

The Add function of System Module Maintenance lets an administrator add custom system module documents and associate them with specific QAD CSS pages.

To create a new entry:

- 1** Click Add in the navigation window to display the edit screen in Add mode.
- 2** Enter data into the appropriate fields.
- 3** Click Add in the edit window to save the record.

Fig. 3.23
Detail System
Module
Maintenance

The screenshot shows a web browser window titled 'System Module Maint - Microsoft Internet Explorer'. The main content area is titled 'Detail System Module Maint'. It contains the following fields and controls:

- Module Name:** A text input field containing 'cc/ccc_processcard.html', which is highlighted with a blue selection bar.
- Module Label:** A text input field containing 'Online Payment'.
- Module Description:** A large text area.
- Alt Text:** A text input field containing 'Online Payment'.
- Page Title:** A text input field containing 'Online Payment'.
- Parent Page:** A dropdown menu.
- Login Required:** A dropdown menu set to 'All'.
- Session Required:** A checked checkbox.
- On Menu:** An unchecked checkbox.
- HTTPS Secure:** An unchecked checkbox.
- Security Required:** A checked checkbox.
- Security Group:** A group of checkboxes including 'B2C' (checked), 'HOU', 'it', and 'SHA'.
- Buttons:** 'Add' and 'Cancel' buttons at the bottom right.

Module Name. Specify the unique name for this menu item. This is the module code relative to the QAD CSS installation directory followed by the HTML file name.

Module Label. Specify the external label for this module. This text is typically displayed on the navigation menu. The module label also serves as the default menu name in Menu Maintenance.

Module Description. Specify a brief, meaningful functional description of the module. This text is the default Menu Description in Menu Maintenance.

Alt Text. Mouse hover text in header bar.

Page Title. Specify the text displayed in the browser title bar for this page.

Parent Page. This field provides hierarchy information for the current page, which is loaded during system implementation. Information in this field is not intended to be edited. If you modify the parent page information, ensure that the change is what you expect by reviewing the Module Hierarchy Report (Administration Menu|Administration Reports).

Login Required. Choose the class of users that can access this module. Users are associated with a specific class in User Maintenance. These classes are:

Blank: No one can access this module.

All (*): Everyone can access this module.

Customer: Only users associated with the Customer class can access this module.

Vendor: Only users associated with the Vendor class can access this module.

Internal: Only users associated with the Internal class can access this module.

Note Currently, QAD CSS users belong to the customer class by default.

Session Required. Select this option when you do not want this page to be directly accessed as the first page without a valid session ID. When this option is not selected, the page can be directly accessed as the first page served; for example, accessed by a bookmark.

On Menu. Select this option when you want the module to be available to be added to the QAD CSS menu in Menu Maintenance.

HTTPS Secure. Indicate if secure processing should be used for this page.

Note To implement this setting, SSL must be set up on your Web server. Otherwise, an error displays during processing.

Security Required. Select this option when you want the module to be accessible only to users belonging to specific security groups. Then choose the user groups from the list below this field. When this option is not selected, any user can access it.

(Administration Menu|Administration Reports).

Security Group List. This list displays the security groups with access to the current program page. Although editable, the check boxes are intended only for temporary changes required to the associations between security groups and program pages. Edits made here are replaced by subsequent updates performed in Menu Maintenance.

Clicking a command button executes one of the following actions:

- Add saves the new record to the database. All required fields—indicated by alternate field color—must be populated prior to saving a record. Before saving, the system verifies that the record is unique and displays an error if it is not.

- Cancel closes the window without adding the record.

Modifying a System Module Entry

The Modify function of System Module Maintenance lets an administrator modify existing system module entries. Requirements for adding a record are the same as for editing a record.

To modify an entry:

- 1 Display the record to modify.
- 2 Click the Module Name link in the row of the record to be modified. Clicking the link displays the edit screen.
- 3 Enter data into the appropriate fields. Fields that do not allow change are indicated by a second alternate color.
- 4 Click Save to commit the changes.

▶ See field descriptions starting on page 159.

JavaScript Module Maintenance

The modular QAD CSS architecture consists of different technology components, including JavaScript among many others. QAD CSS pages are dynamically generated, automatically assembling required components to serve page requests. JavaScript Module Maintenance is the function where developers associate the appropriate JavaScript components to applicable QAD CSS modules.

JavaScript Module Maintenance is a developer-specific maintenance function in QAD CSS. A thorough understanding of QAD CSS development methodology is recommended before making changes in this section.

JavaScript Module Maintenance is reached from the System Module Maintenance screen by clicking the View link.

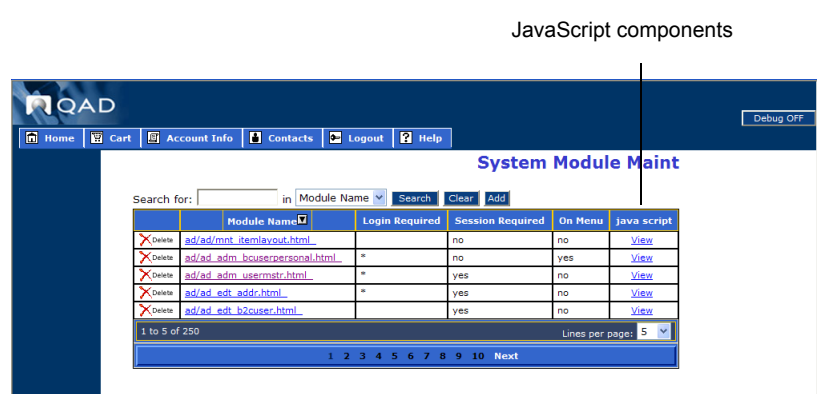


Fig. 3.24
Viewing JavaScript
Details Through
System Module
Maintenance

Clicking the View link in System Module Maintenance displays the screen in Figure 3.25.

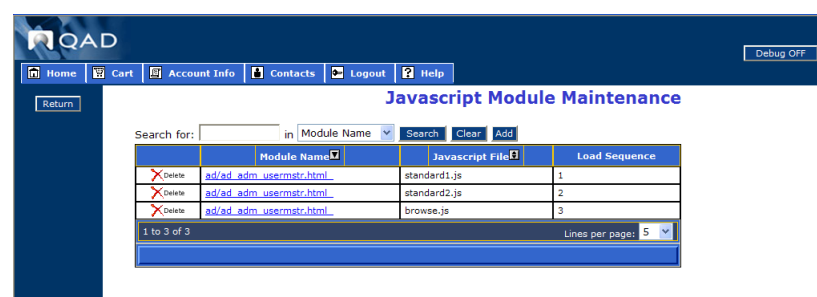


Fig. 3.25
JavaScript Module
Maintenance

Table 3.8 summarizes the contents of the JavaScript Module Maintenance navigation screen.

Column	Search	Search Type	Sort	Description	Link
JavaScript File	Y	Equal	Y	Relative Web path and file name of the JavaScript file.	N
Module Name	Y	Contains	Y	The name of the QAD CSS module in which this JavaScript file is an included component.	Y
Load Sequence	N	n/a	N	Order in which the corresponding JavaScript will be loaded relative to the other JavaScript files that are loaded in the module.	N

Table 3.8
JavaScript Module
Maintenance
Navigation

Adding a JavaScript Entry

The Add function of JavaScript Module Maintenance lets an administrator add custom JavaScript documents and associate them with specific QAD CSS pages. The following information is required to complete this process:

- The name and location of the JavaScript file
- The QAD CSS module associated with the JavaScript file
- The load order

To create a new entry:

- 1 Click Add in the navigation window to display the edit screen in Add mode.
- 2 Enter data into the appropriate fields.
- 3 Click Add in the edit window to save the record.

Fig. 3.26
Detail JavaScript
Maintenance

Module Name. The name of the QAD CSS module where this JavaScript file is included as a component.

JavaScript File. Relative Web path and file name of the JavaScript file.

Load Sequence. Order in which the corresponding JavaScript will be loaded relative to other JavaScript files loaded in the module.

Clicking a command button executes one of the following actions:

- Add saves the new record to the database. All required fields—indicated by alternate field color—must be populated prior to saving a record. Before saving, the system verifies that the record is unique and displays an error if it is not.
- Cancel closes the window without adding the record.

Modifying a JavaScript Entry

The Modify function of JavaScript Maintenance lets an administrator modify existing JavaScript entries. Requirements for adding a record are the same as for editing a record.

To modify an entry:

- 1 Display the record to modify.
- 2 Click the Module Name link in the row of the record to be modified. Clicking the link displays the edit screen.
- 3 Enter data into the appropriate fields. Fields that do not allow change are indicated by a second alternate color.
- 4 Click Save to commit the changes.

▶ See field descriptions starting on page 164.

QAD CSS Clearance Code

QAD CSS Clearance Code is used for informational purposes to let administrators view the clearance information for their implementation of QAD CSS. This information is available only for registered owners of QAD CSS.

Registration is a one-time event that typically takes place during installation of the product. You would need to execute this function again only if you purchase additional languages or licenses. See *Installation Guide: QAD CSS* for details about registering your product during installation.

The menu location of QAD CSS Clearance Code is Home Menu|Administration Menu|System Control Menu|QAD CSS Clearance Code.

Clicking the QAD CSS Clearance Code menu option displays the screen in Figure 3.27.

Fig. 3.27
Detail QAD CSS
Clearance Code

Customer Name. Name of the company registering QAD CSS.

Serial Number. Unique identifier used with the customer name to register QAD CSS. The serial number is provided in your product package and specified during installation.

Install Date. Date of initial installation.

Expiration Date. Date the software expires.

Clearance Code. Code provided by QAD to register the software.

Agent Count. The number of Progress WebSpeed agents that can be used with this installation of QAD CSS.

Language Count. Total number of language modules allowed for this implementation.

Module List. An internal list that indicates which modules have been purchased and installed. The integer 1 indicates that a module is installed; 0 indicates that it is not.

Clicking a command button executes one of the following actions:

- Register sends the company name and serial number you specify to the QAD CSS clearance server for validation. Once validated, the clearance server returns the additional details about the license, including the clearance code, agent count, language count, and module list. The Register button then changes to Update. Clicking update stores the information returned by the clearance server in your QAD CSS database, where it can be viewed here.
- Cancel closes the window without adding the record.

The background of the page is a grayscale image of several interlocking gears. The gears are of different sizes and are positioned in a way that they appear to be meshing together. The lighting creates highlights and shadows on the teeth of the gears, giving them a three-dimensional appearance. The overall tone is technical and industrial.

Chapter 4

Language

This chapter covers the use of language functions for non-English installations of QAD CSS.

<i>Introduction</i>	168
<i>Currency Unicode Maintenance</i>	170
<i>Data Translation Fields</i>	174
<i>Language Control Maintenance</i>	176
<i>String Translation Maintenance</i>	180

Introduction

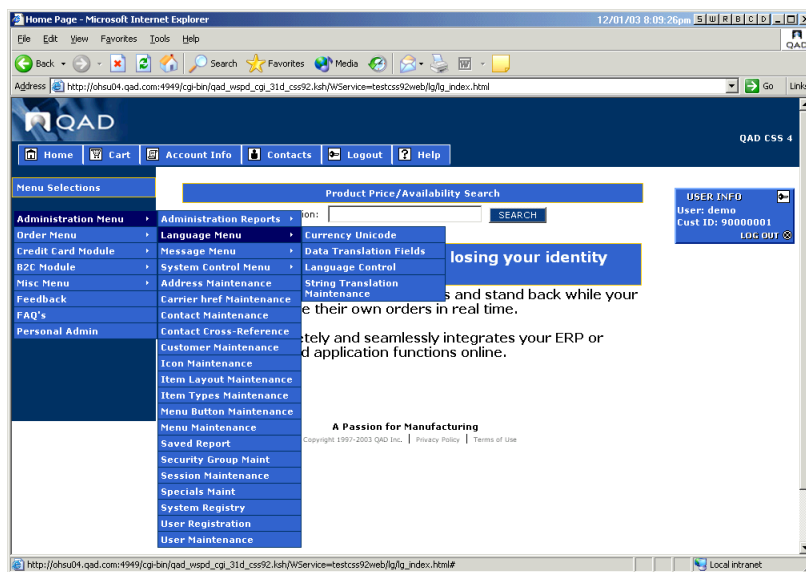
Language functions let you set up information used for non-English installations. You can also use these functions to modify the strings and labels that display in English.

See “QAD CSS Clearance Code” on page 165.

Your QAD CSS system must be cleared to use multiple languages before language translation takes effect. QAD CSS Clearance Code lets you view the number of languages cleared for your system.

The menu location of language functions is Home Menu|Administration Menu|Language Menu.

Fig. 4.1
QAD CSS
Language Menu



There are three major language translation processes in QAD CSS. Language maintenance is the first step in establishing the rules for each process.

- The first process translates individual fixed strings.
- The second process translates phrases of text that may contain calculated values.
- The third process translates specific data elements.

QAD CSS language functions include:

- Currency Unicode Maintenance establishes a relationship between currency codes and the currency symbols displayed in QAD CSS. See page 170.
- Data Translation Fields Maintenance controls which database fields are available for translation into other languages. See page 174.
- Language Control Maintenance is used to create and maintain the definitions of languages implemented in QAD CSS. See page 176.
- String Translation Maintenance controls the translation of most noneditable text in QAD CSS such as buttons, labels, and informational text. Phrases that contain a combination of strings and values are dynamically translated in real time when a page is loaded. See page 180.

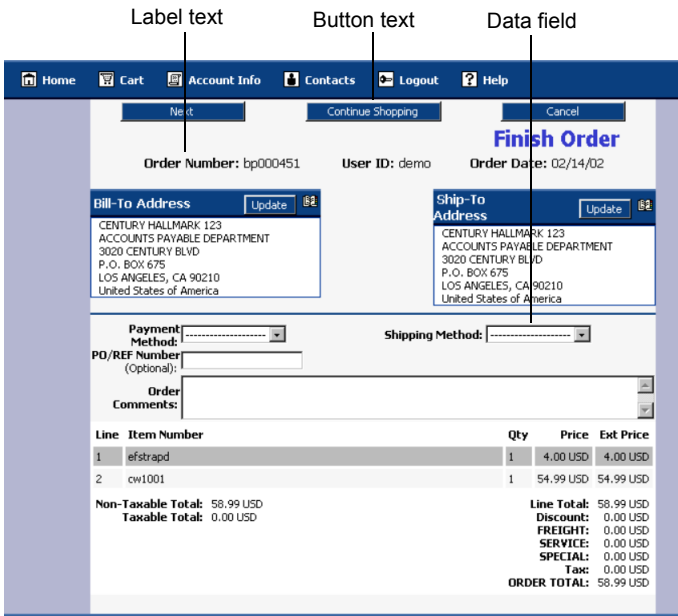


Fig. 4.2
Translatable Screen
Components

The initial default language in QAD CSS is set to English. Any language can be chosen as the default. Set the default language to the appropriate language prior to defining data that is translatable into other languages. Data translation definitions are allowed only from the default language.

See “Language Control Maintenance” on page 176 to set the default language.

♦ See “Menu Maintenance” on page 97 for details on menu setup and security.

Language maintenance functions are available only to users with authority to access these functions.

Note Consider restricting access to authorized administrators or individuals with the specific responsibility for setting up language options.

Currency Unicode Maintenance

Use Currency Unicode Maintenance to establish the relationship between the currency codes in MFG/PRO and the currency symbols displayed in QAD CSS.

The currency symbols are represented by hexadecimal codes for the character set of the appropriate language. The hexadecimal for the same currency symbol can be different across character sets. The ISO currency symbols may not match the currency codes in MFG/PRO.

The International Organization for Standardization (ISO) Web site lists the most current world currency abbreviations for the ISO 4217 character set. You can access the Web site at:

<http://www.iso.ch>

Important You should use the codes as defined by MFG/PRO.

International organizations should take into account the likelihood of their customers not having the appropriate display translators.

The registry setting *useCurrencyUnicode* determines whether the system looks for a hexadecimal unicode associated with the currency for this user session in Currency Unicode Maintenance. If one has been defined, it is displayed before the price amounts. If *useCurrencyUnicode* is No, nothing displays before the price. However, the system always displays the currency code after the price.

Example A hexadecimal value is associated with USD in Currency Unicode Maintenance; \$ displays before the price and USD after it.

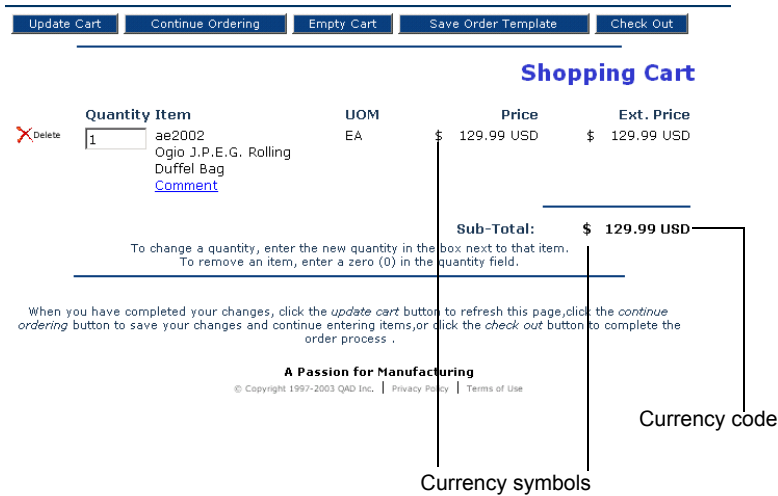


Fig. 4.3
Currency Symbols

The menu location of Currency Unicode Maintenance is Home Menu|Administration Menu|Language Menu|Currency Unicode Maintenance.

Clicking the Currency Unicode Maintenance menu option displays the screen in Figure 4.4.

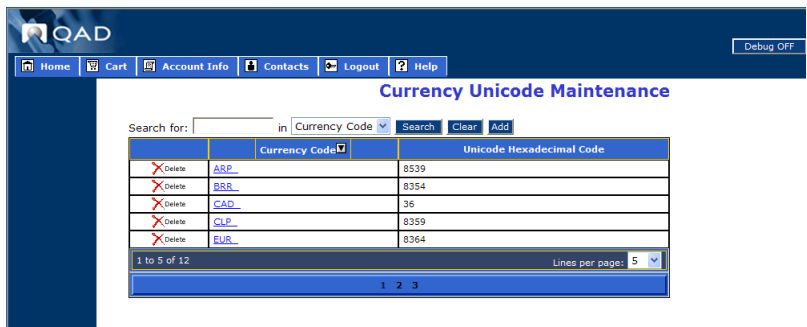


Fig. 4.4
Currency Unicode Maintenance

Table 4.1 summarizes the contents of the Currency Unicode Maintenance navigation screen.

Table 4.1
Currency Unicode
Maintenance
Navigation

Column	Search	Search Type	Sort	Description	Link
Currency Code	Y	Begins	Y	The abbreviation of the currency code as defined in MFG/PRO.	Y
Hexadecimal Code	N	n/a	N	The currency code symbol represented in hexadecimal format. A hexadecimal code is necessary for Web browsers to display the currency symbol.	N

Related QAD CSS functions:

- Order Entry 1
- Order Entry 2
- Order Entry 3
- Language Control Maintenance

▶ See page 176.

Adding a Currency Unicode Entry

The Add function of Currency Unicode Maintenance lets an administrator add custom currency unicode documents and associate them with specific QAD CSS pages. The following information is required to complete this process:

- The ISO 4217 three-letter code for the currency
- The correct hexadecimal code for the currency symbol and the Web browser language pack being used by the user

To create a new entry:

- 1 Click Add in the navigation window to display the edit screen in Add mode.
- 2 Enter data into the appropriate fields.
- 3 Click Add in the edit window to save the record.

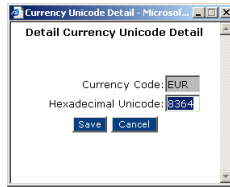


Fig. 4.5
Detail Currency
Unicode

Currency Code. The abbreviation of the currency code as defined in MFG/PRO.

Hexadecimal Unicode. The currency code symbol represented in hexadecimal format. A hexadecimal code is necessary for the Web browser to display the currency symbol.

Important It is extremely important to understand the relationship between character sets and hexadecimal codes, as well as how they interact and work in software applications. Errors in character sets can lead to unpredictable results.

Clicking a command button executes one of the following actions:

- Add saves the new record to the database in the wpro_currency table. All required fields—indicated by alternate field color—must be populated prior to saving a record. Before saving, the system verifies that the record is unique and displays an error if it is not.
- Cancel closes the window without adding the record.

Modifying a Currency Unicode Entry

The Modify function of Currency Unicode Maintenance lets an administrator modify existing currency unicode entries. Requirements for adding a record are the same as for editing a record.

To modify an entry:

- 1 Display the record to modify.
- 2 Click the Currency Code link in the row of the record to be modified. Clicking the link displays the edit screen.
- 3 Enter data into the appropriate fields. Fields that do not allow change are indicated by a second alternate color.

See field descriptions starting on page 172.

- 4 Click Save to commit the changes.

Data Translation Fields

Use Data Translation Fields Maintenance to specify database fields available for translation into other languages. When fields are marked as translatable, the system performs additional processing to look up translated values.

If you don't plan to translate some fields, removing them as candidates can increase connection speed and help to free WebSpeed agents.

The menu location of Data Translation Fields Maintenance is Home Menu|System Control|Data Translation Fields Maint.

Clicking the Data Translation Fields Maintenance menu option displays the screen in Figure 4.6.

Fig. 4.6
Data Translation
Fields Maintenance

Table 4.2 summarizes the contents of the Data Translation Fields Maintenance navigation screen.

Table 4.2
Data Translation
Fields Maintenance
Navigation

Column	Search	Search Type	Sort	Description	Link
Table Name	Y	Contains	Y	Available only in add mode. This is the actual QAD CSS database table name.	Y
Field Name	Y	Contains	Y	Available only in add mode. This is the actual database table field name.	N

Related QAD CSS functions:

- ♦ See page 240.
- Data Translation Report

Adding a Data Translation Field Entry

The Add function of Data Translation Fields Maintenance lets an administrator add custom data translation. The following information is required to complete this process:

- Database table name
- Database table field name

To create a new entry:

- 1 Click Add in the navigation window to display the edit screen in Add mode.
- 2 Enter data into the appropriate fields.
- 3 Click Add in the edit window to save the record.

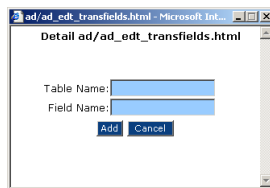


Fig. 4.7
Detail Edit
Translation Fields

Table Name. This must be the complete name of an existing database table.

Field Name. This must be an existing field in the database table.

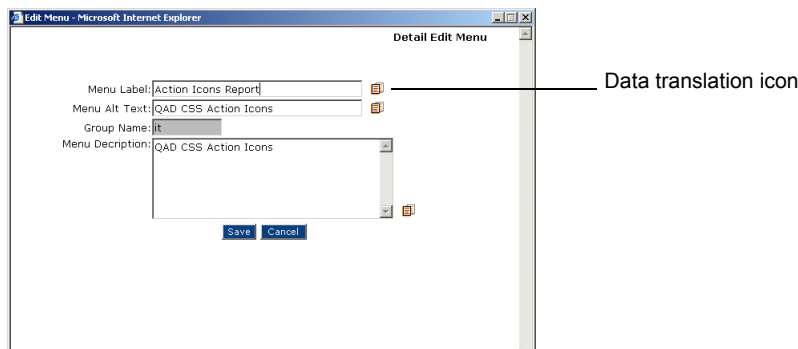
Clicking a command button executes one of the following actions:

- Add saves the new record to the database. All required fields—indicated by alternate field color—must be populated prior to saving a record. Before saving, the system verifies that the record is unique and displays an error if it is not.
- Cancel closes the window without adding the record.

After a data translation entry is added, the data translation icon is displayed next to the field when you modify an entry in the corresponding maintenance function.

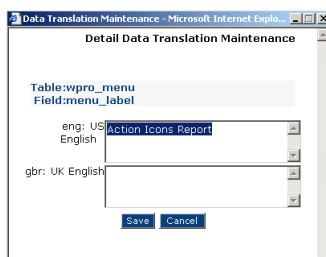
Note Data translation icons display only when you are logged in with the default language. Data translation is not allowed from a non-default language.

Fig. 4.8
Data Translation
Field in Customer
Care Edit Screen



Clicking the data translation icon activates a window that lets you translate the associated data field into each supported language.

Fig. 4.9
Data Translation of
Menu Button Data
Field



Modifying a Data Translation Entry

You cannot modify existing data translation entries using Data Translation Fields Maintenance. Changes to existing data translation is a customization effort.

Language Control Maintenance

Use Language Control Maintenance to create and maintain the definitions of languages implemented in QAD CSS. Language Control Maintenance is the core of all language, translation, and display functions. All languages defined within Language Control Maintenance can be accessed simultaneously, serving real-time translated Web pages based on user language preference.

The number of languages that can be operated depends on the number of language modules purchased for QAD CSS. The number of language modules is displayed in the QAD CSS Clearance Code function.

See “QAD CSS Clearance Code” on page 165.

Warning Do not delete the default language under any circumstances.

When multiple languages are used, make sure the ISO number for the HTML document character set supports every language. The International Organization for Standardization Web site lists the most current HTML coded character sets. You can access the Web site at:

<http://www.iso.ch>

The menu location of Language Control Maintenance is Home Menu|Administration Menu|Language Menu|Language Control Maintenance.

Clicking the Language Control Maintenance menu option displays the screen in Figure 4.10.



Fig. 4.10
Language Control Maintenance

Table 4.3 summarizes the contents of the Language Control Maintenance navigation screen.

Column	Search	Search Type	Sort	Description	Link
Code	Y	Begins	Y	A unique identifier for this language.	Y
Language Description	Y	Begins	Y	The native name of the language; for example, Espanol.	N
Default	N	n/a	N	This field indicates the default language of the QAD CSS implementation. Only one language can be set as the default. Do not change the default language.	N

Table 4.3
Language Control Maintenance Navigation

Column	Search	Search Type	Sort	Description	Link
Date Format	N	n/a	N	Date display format order (d=day, m=month, y=year)	N
Number Format	N	n/a	N	Number display format for thousand separator and decimal point.	N
Character Set	N	n/a	N	HTML document character set (ISO number).	N

Related QAD CSS functions:

- ▶ See page 180.
 - ▶ See page 170.
 - ▶ See page 240.
 - ▶ See page 66.
- String Translation Maintenance
 - Currency Unicode Maintenance
 - Data Translation Report
 - User Maintenance

Adding a Language Control Entry

The Add function of Language Control Maintenance lets an administrator add a language definition.

To create a new entry:

- 1 Click Add in the navigation window to display the edit screen in Add mode.
- 2 Enter data into the appropriate fields.
- 3 Click Add in the edit window to save the record.

Fig. 4.11
Detail Edit
Language Control

Language Code. A unique identifier for this language.

Language Description. The native name of the language; for example, Español.

Default Language. This field cannot be changed. It indicates the default language of the QAD CSS implementation. Only one language can be set as the default. Do not change the default language.

Active. Indicate if this language is currently active.

Date Format. Select the appropriate month/day/year format from the drop-down list.

Number Format. Select the thousand and decimal format for languages.

Character Set. Specify the ISO number for the HTML document character set.

Check all Database tables to be copied from default language. This causes related database records to be copied from the default language database records. Administrators can then use the appropriate maintenance function to edit records with translatable fields.

Important Not checking `wpro_error_msg` will cause JavaScript errors while logging in using the new language. Not checking `wpro_data_trans` will cause the data fields to show up unpopulated.

Clicking a command button executes one of the following actions:

- Add saves the new record to the database in the `wpro_lang_control` table. All required fields—indicated by alternate field color—must be populated prior to saving a record. Before saving, the system verifies that the record is unique and displays an error if it is not.
- Cancel closes the window without adding the record.

Modifying a Language Control Entry

The Modify function of Language Control Maintenance lets an administrator modify existing language control entries. Requirements for adding a record are the same as for editing a record.

To modify an entry:

- 1 Display the record to modify.
- 2 Click the Language Code link in the row of the record to be modified. Clicking the link displays the edit screen.
- 3 Enter data into the appropriate fields. Fields that do not allow change are indicated by a second alternate color.
- 4 Click Save to commit the changes.

▶ See field descriptions starting on page 178.

String Translation Maintenance

The QAD CSS String Translation Maintenance function lets administrators translate many of the maintenance buttons, labels, and informational text and phrases. Translated text can appear on many QAD CSS pages in different languages.

▶ See “Language Control Maintenance” on page 176.

Note The general appearances of numbers and dates are set up in Language Control Maintenance.

Translations of different elements are maintained through different functions. String Translation Maintenance covers most noneditable text that appears as labels on different screens including pop-up windows. This also translates maintenance buttons such as Add and Cancel.

Available options in String Translation Maintenance are dictated by the language modules and licenses that have been purchased with QAD CSS.

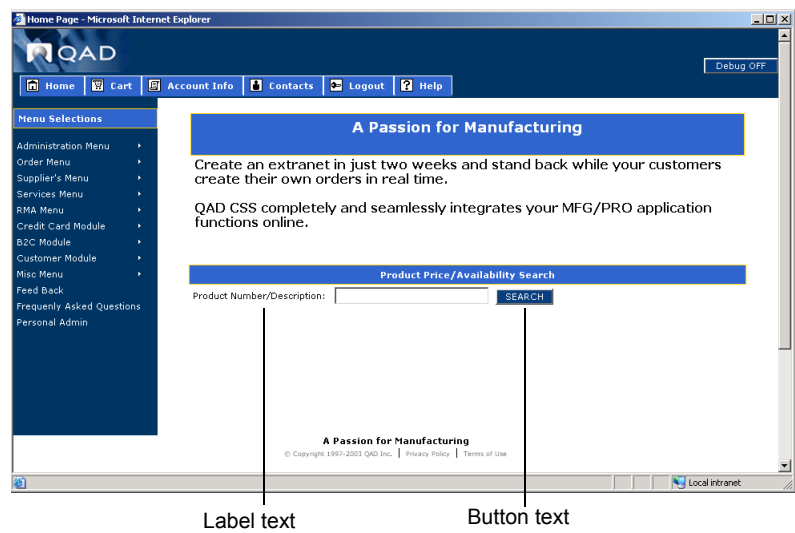


Fig. 4.12
Text Strings
Available for
Translation

The menu location of String Translation Maintenance is Home Menu|Administration Menu|Language Menu|String Translation Maintenance.

Clicking the String Translation Maintenance menu option displays the screen in Figure 4.13.

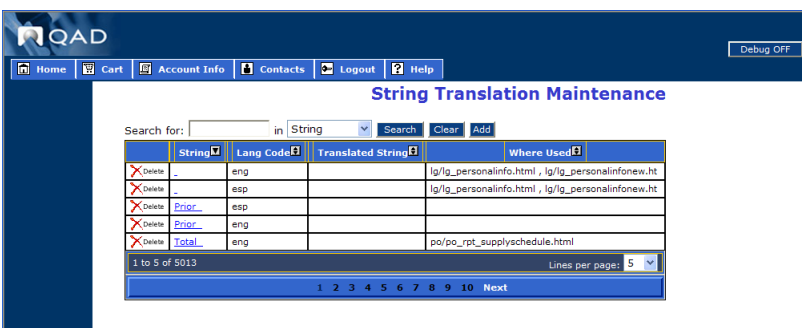


Fig. 4.13
String Translation
Maintenance

Table 4.4 summarizes the contents of the String Translation Maintenance navigation screen.

Table 4.4
String Translation
Maintenance
Navigation

Column	Search	Search Type	Sort	Description	Link
String	Y	Contains	Y	Static (prompt) text.	Y
Translated String	Y	Contains	Y	Translated static prompt text. Strings in English will show blank translated strings.	N
Language Code	Y	Begins	Y	A recognizable code for the translation language.	N

Related QAD CSS functions:

- See page 58.
 - See page 92.
 - See page 97.
 - See page 156.
- Security Group Maintenance
 - Menu Button Maintenance
 - Menu Maintenance
 - System Module Maintenance

Adding a String Translation Entry

The Add function of String Translation Maintenance lets an administrator add custom string translation documents and associate them with specific QAD CSS pages. The following information is required to complete this process:

- The name of the string to added
- The text string in English and the translated language

To create a new entry:

- 1 Click Add in the navigation window to display the edit screen in Add mode.
- 2 Enter data into the appropriate fields.
- 3 Click Add in the edit window to save the record.

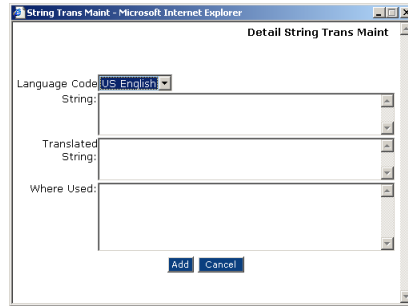


Fig. 4.14
Detail Edit String
Translation

Language Code. Select an available language code from the drop-down menu.

String. The string as it appears in English (default language). Some string are too long to put into the string field; these can be abbreviated; for example, lg_custsel_1, he_msg_1.

Translated String. The correct translation for the string.

Where Used. The module where the string is used. This field is for your information and can help with future maintenance activities.

Clicking a command button executes one of the following actions:

- Add saves the new record to the database. All required fields—indicated by alternate field color—must be populated prior to saving a record. Before saving, the system verifies that the record is unique and displays an error if it is not.
- Cancel closes the window without adding the record.

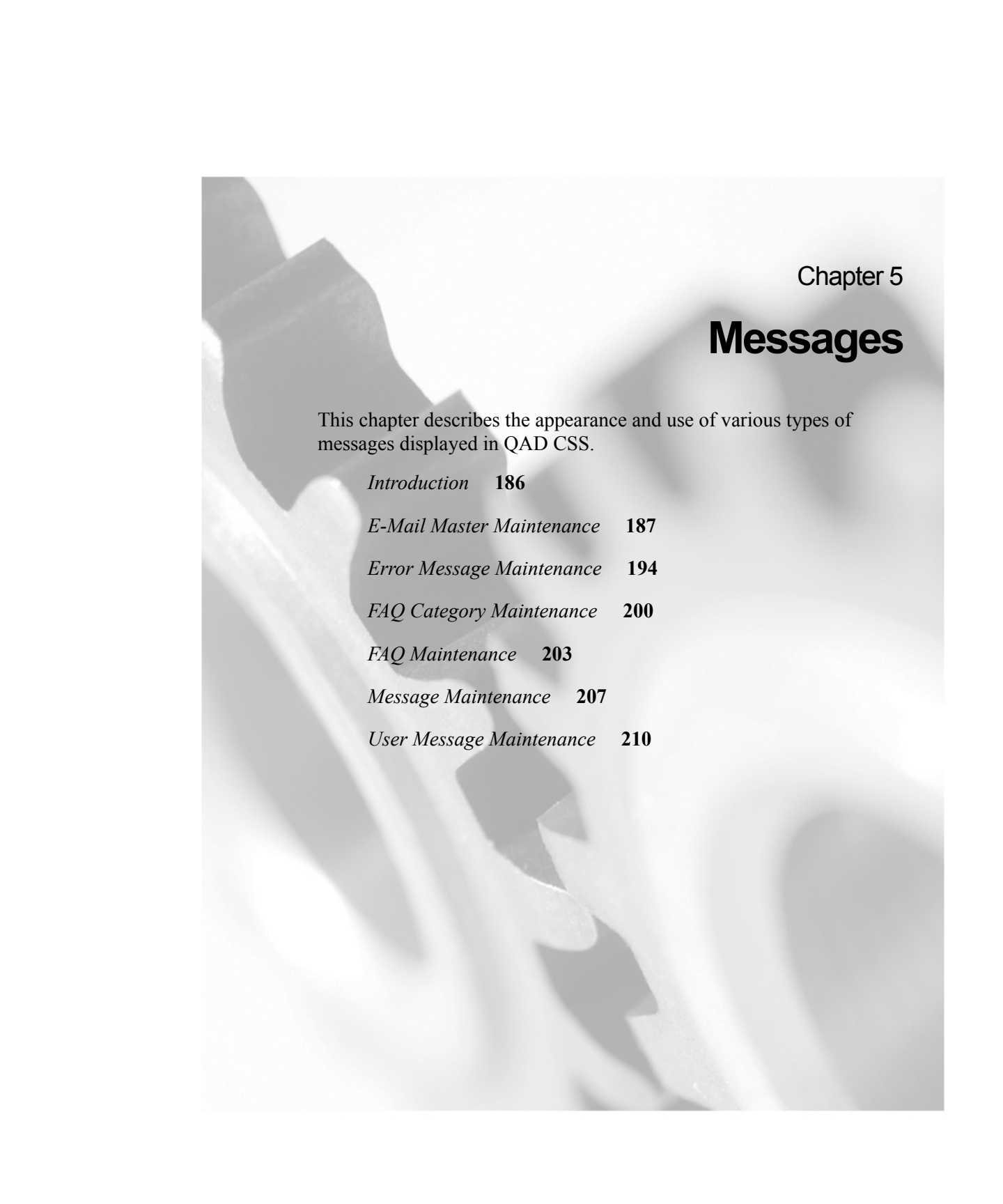
Modifying a String Translation Entry

The Modify function of String Translation Maintenance lets an administrator modify existing string translation entries. Requirements for adding a record are the same as for editing a record.

To modify an entry:

- 1 Display the record to modify.
- 2 Click the String link in the row of the record to be modified. Clicking the link displays the edit screen.

- ▶ See field descriptions starting on page 182.
- 3** Enter data into the appropriate fields. Fields that do not allow change are indicated by a second alternate color.
- 4** Click Save to commit the changes.

The background of the page features a grayscale image of several interlocking mechanical gears. The gears are of different sizes and are positioned in a way that creates a sense of depth and movement. The lighting is soft, highlighting the metallic texture of the gears.

Chapter 5

Messages

This chapter describes the appearance and use of various types of messages displayed in QAD CSS.

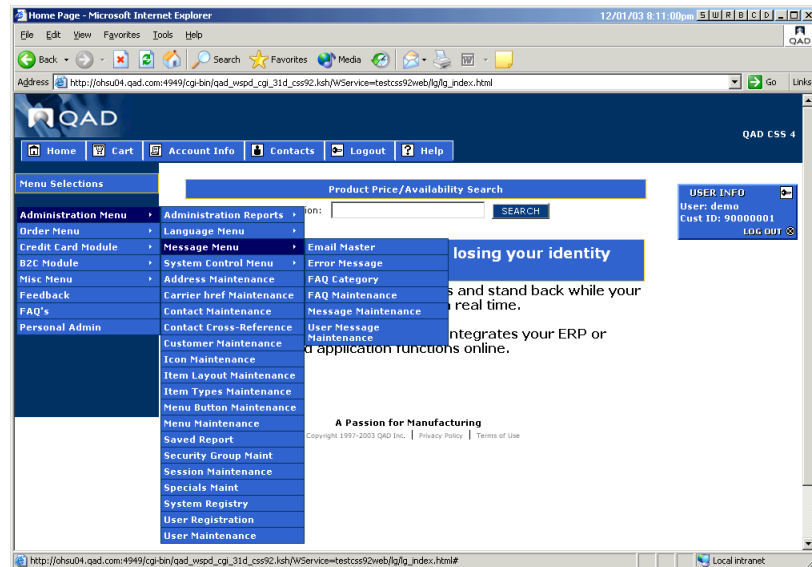
<i>Introduction</i>	186
<i>E-Mail Master Maintenance</i>	187
<i>Error Message Maintenance</i>	194
<i>FAQ Category Maintenance</i>	200
<i>FAQ Maintenance</i>	203
<i>Message Maintenance</i>	207
<i>User Message Maintenance</i>	210

Introduction

Message functions let you determine when various messages display as well as the message content. Messages are used to notify users when events or errors have occurred, to deliver additional information to users, and to provide immediate answers to frequently asked questions.

The menu location of message functions is Home Menu|Administration Menu|Message Menu.

Fig. 5.1
QAD CSS Message
Menu



Message functions include the following:

- E-Mail Master Maintenance provides the ability to automatically notify users, customers, salespeople, administrators, and others using e-mail when certain events occur.
- Error Message Maintenance is used to create, edit, and delete error and informational messages to users. The message delivery method (e-mail, HTML, or log) and the message itself are configurable.
- FAQ Category Maintenance and FAQ Maintenance are used to create question and answer pages and logically group them by category.
- Message Maintenance defines the welcome message displayed on the home page to be viewed by all users or groups of users.

- User Message Maintenance is used to create messages directed at specific users and displayed on the home page. The user must click a link to display the message content.

Message maintenance functions are available only to users with authority to access these functions.

Note Consider restricting access to authorized administrators or individuals with the specific responsibility for setting up message options.

♦ See “Menu Maintenance” on page 97 for details on menu setup and security.

E-Mail Master Maintenance

A key feature of QAD CSS lets administrators set up e-mail to be sent automatically when certain events occur. The events are predefined trigger points. Use E-Mail Master Maintenance to activate the events and define the message content.

Implementation Guide: *QAD Customer Self Service* contains a full list of the events that can trigger an e-mail.

Each event that triggers a message can be associated with one or more QAD CSS users who receive the e-mail. These users must be defined in QAD CSS User Maintenance. Users do not have to access the system; however, setting them up as users is required to define the e-mail address. You can send messages to user accounts that are disabled if some of your internal personnel need to be informed of events but do not need to have access to the system.

When an e-mail is generated, you can also send a copy of the message to the user whose session generated it or to the salesperson associated with an order.

The menu location of E-Mail Master Maintenance is Home Menu|Administration Menu|E-Mail Master Maintenance.

Clicking the E-Mail Master Maintenance menu option displays the screen in Figure 5.2.

Fig. 5.2
E-Mail Master
Maintenance

Event ID	Event Name	Email Subject	Event Status	Details
Delete EX001	Customer Order Submitted	Thank-you for your order	no	View
Delete EX003	User - Added	QAD CSS - User has been added	no	View
Delete EX004	User - Deleted	QAD CSS - User has been deleted	no	View
Delete EX005	User - Modified	QAD CSS - User account modified	no	View
Delete EX006	Personal Admin	QAD CSS - Personal Administration	no	View

Table 5.1 summarizes the contents of the E-Mail Master Maintenance navigation screen.

Table 5.1
E-Mail Master
Maintenance
Navigation

Column	Search	Search Type	Sort	Description	Link
Event ID	Y	Begins	Y	Unique identifier for this e-mail event.	Y
Event Name	Y	Begins	Y	A meaningful name that describes the event.	N
E-Mail Subject	N	n/a	N	The content of subject line for the e-mail.	N
Details	N	n/a	N	This link activates the maintenance for the recipient list of this e-mail event.	Y

Related QAD CSS functions:

- [See page 242.](#)
- [See page 243.](#)
- [See page 255.](#)
- E-Mail Address Report
 - E-Mail Event Journal Report
 - User Master Report

Adding an E-Mail Master Entry

The Add function of E-Mail Master Maintenance lets an administrator add custom e-mail events and the content of the e-mail. The following information is required to complete this process:

- The event ID of a predefined QAD CSS e-mail event
- The content of the message
- Runtime replacement symbols that are available

To create a new entry:

- 1 Click Add in the navigation window to display the edit screen in Add mode.
- 2 Enter data into the appropriate fields.
- 3 Click Add in the edit window to save the record.

Master Email Maintenance - Microsoft Internet Explorer

Detail Master Email Maintenance

Event ID: Event Status: ☐

Send Copy to Salesperson: ☐ Send Copy to User: ☒

Event Name:

Subject:

Body:

Legend

Symbol	Replacement Value
[@userID]	Logged in User ID
[@custID]	Logged in Customer ID
[@orderNum]	Order number
[@eventTime]	Time of event Firing
[@eventDate]	Date of event Firing
[@PONum]	Purchase Order Number
[@invoiceNum]	Invoice Number
[@userName]	Logged in User Real Name
[@userEmail]	Logged in user's email address

Body Report Program:

Attachment Report Program:

Fig. 5.3
Detail Master
E-Mail
Maintenance

Event ID. Unique identifier for this e-mail event.

Event Status. This indicates the status of the event. When this is selected, the event is active.

Send Copy to Salesperson. This field indicates whether a customer's salespeople (as defined in MFG/PRO) receive a copy of the e-mail. When this is selected, this feature is active.

Send Copy to User. This field indicates whether the customer receives a copy of the e-mail. When this option is selected, this feature is active.

Event Name. A meaningful name that describes the event

Subject. The content of the subject line for the e-mail, including symbol replacements, if needed.

Body. The content of the e-mail, including symbol replacements, if needed.

Body Report Program. Specifies the name of the procedure to execute to generate the body of the message. Procedures can be developed to extend the content of the e-mail to include such things as reports or other complex content.

Attachment Report Program. Specifies the name of the procedure to execute to generate the attachments to the e-mail. Procedures can be developed to extend the e-mail function to include such things as reports or other complex content in attachments.

Clicking a command button executes one of the following actions:

- Add saves the new record to the database in the wpro_emev_master table. All required fields—indicated by alternate field color—must be populated prior to saving a record. Before saving, the system verifies that the record is unique and displays an error if it is not.
- Cancel closes the window without adding the record.

Symbol Replacement

The e-mail subject and body use a symbol replacement feature. A symbol is a string of predefined text that is replaced when the e-mail is generated with the value that the symbol represents. Predefined symbols are listed in the screen legend.

The value for a symbol is only available in associated functions of QAD CSS. For example, generating an e-mail with the [orderNum] symbol at the time of log-in will not produce an order number in the e-mail content.

Modifying an E-Mail Master Entry

The Modify function of E-Mail Master Maintenance lets an administrator modify existing e-mail master entries. Requirements for adding a record are the same as for editing a record.

To modify an entry:

- 1 Display the record to modify.
- 2 Click the Event Name link in the row of the record to be modified. Clicking the link displays the edit screen.
- 3 Enter data into the appropriate fields. Fields that do not allow change are indicated by a second alternate color.
- 4 Click Save to commit the changes.

See field descriptions starting on page 189.

E-Mail Event Maintenance

While in E-Mail Master Maintenance, you can click a View link to display e-mail events corresponding to the Event row.

Note *Implementation Guide: QAD Customer Self Service* contains a full list of the events that can trigger an e-mail.

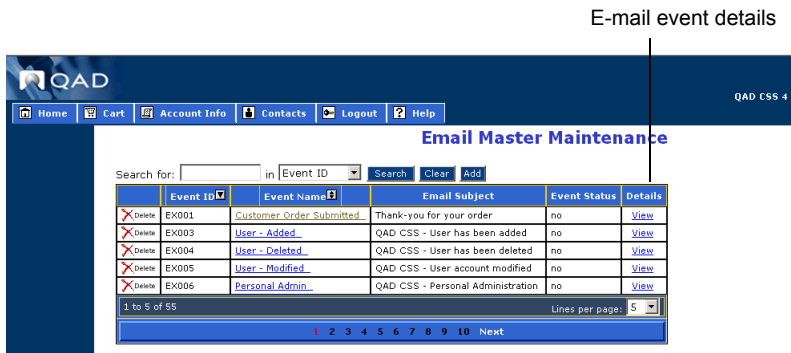


Fig. 5.4
Viewing E-mail
Event Details
Through E-Mail
Master
Maintenance

Clicking a View link displays the screen in Figure 5.5.

Fig. 5.5
E-Mail Event
Maintenance

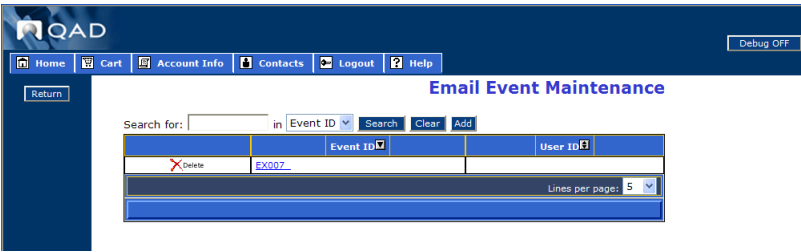


Table 5.2 summarizes the contents of the E-Mail Event Maintenance navigation screen.

Table 5.2
E-Mail Event
Maintenance
Navigation

Column	Search	Search Type	Sort	Description	Link
Event ID	Y	Equals	Y	Unique identifier of the e-mail event.	Y
User ID	Y	Equals	Y	User associated with this event.	N

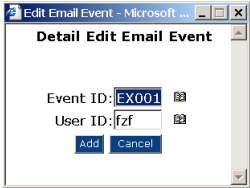
Adding an E-Mail Event Entry

The Add function of E-Mail Event Maintenance lets an administrator add custom e-mail event documents and associate them with specific QAD CSS pages.

To create a new entry:

- 1 Click Add in the navigation window to display the edit screen in Add mode.
- 2 Enter data into the appropriate fields.
- 3 Click Add in the edit window to save the record.

Fig. 5.6
Detail Edit E-Mail
Event



Event ID. Enter an existing identifier for an e-mail event. This field can be browsed to locate valid entries.

Browse icon. This icon brings up an e-mail event master window that lets users select from a list of all existing e-mail events.

User ID. Unique identifier for a QAD CSS user. This field can be browsed to locate valid entries.

Browse icon. This icon brings up a browse master window that lets users select from a list of all valid QAD CSS user IDs.

Clicking a command button executes one of the following actions:

- Add saves the new record to the database. All required fields—indicated by alternate field color—must be populated prior to saving a record. Before saving, the system verifies that the record is unique and displays an error if it is not.
- Cancel closes the window without adding the record.

Modifying an E-Mail Event Entry

The Modify function of E-Mail Event Maintenance lets an administrator modify existing e-mail event entries. Requirements for adding a record are the same as for editing a record.

To modify an entry:

- 1 Display the record to modify.
- 2 Click the Event ID link in the row of the record to be modified. Clicking the link displays the edit screen.
- 3 Enter data into the appropriate fields. Fields that do not allow change are indicated by a second alternate color.
- 4 Click Save to commit the changes.

◆ See field descriptions starting on page 192.

Error Message Maintenance

The QAD CSS Error Message Maintenance function lets administrators create, edit, and delete error messages. There are two types of error messages: JavaScript (js) and Progress (pro). The way the message is delivered (e-mail, HTML, or log) as well as the messages themselves are configurable.

Administrators can also use Error Message Maintenance to create messages that deliver additional information to the user when an event occurs. This functionality is similar to E-Mail Master Maintenance, but Error Message Maintenance is not restricted to e-mail notification only.

QAD CSS comes with over a thousand programmed events, most of which do not require user interaction. JavaScript error messages do not require event actions.

Note JavaScript error messages are preloaded into HTML pages. When adding or modifying a JavaScript message, you must click Generate File to create the actual file.

See “Error Action Maintenance” on page 197.

Events can be set up through Error Message Maintenance, but activating them requires custom programming.

The menu location of Error Message Maintenance is Home Menu|Administration Menu|System Control Menu|Error Message Maintenance.

Clicking the Error Message Maintenance menu option displays the screen in Figure 5.7.

Fig. 5.7
Error Message Maintenance

	Error Number	Type	Module	Language	Error Action
Delete	-	pro		eng	View
Delete	-	pro		esp	View
Delete	ad000001	pro	ad_edt_emevent	eng	View
Delete	ad000001	pro	ad_edt_emevent	esp	View
Delete	ad000002	pro	ad_edt_emevent	esp	View

1 to 5 of 1466 Lines per page: 5

1 2 3 4 5 6 7 8 9 10 Next

Table 5.3 summarizes the contents of the Error Message Maintenance navigation screen.

Column	Search	Search Type	Sort	Description	Link
Error Number	Y	Begins	Y	Unique error identifier.	Y
Type	Y	Begins	Y	The type of error (Progress or JavaScript).	N
Module	Y	Begins	Y	Specific QAD CSS module from which the error will be generated.	N
Language	N	n/a	N	The language associated with the error message. If a message is to appear in multiple languages, it must have a unique error number for each language.	N
Error Action	N	n/a	N	Displays Error Action Maintenance for the specific error number.	Y

Table 5.3
Error Message
Maintenance
Navigation

Related QAD CSS functions:

- Error Message Master

See page 244.

Adding an Error Message Entry

The Add function of Error Message Maintenance lets an administrator add custom error message documents and associate them with specific QAD CSS pages.

To create a new entry:

- 1 Click Add in the navigation window to display the edit screen in Add mode.
- 2 Enter data into the appropriate fields.
- 3 Click Add in the edit window to save the record.

Note Adding an event will not generate event actions. Custom development is required to implement events.

Fig. 5.8
Detail Edit Error
Message

The screenshot shows a web browser window titled "Edit Error Message - Microsoft Internet Explorer". The main content area is titled "Detail Edit Error Message". It contains the following fields:

- Error Number: A text input field.
- Language Code: A dropdown menu currently showing "US English".
- Module: A text input field.
- Error Message: A large text area.
- Description: A large text area.
- Type: A dropdown menu currently showing "Progress".

At the bottom of the form are two buttons: "Add" and "Cancel".

Error Number. Unique error message identifier. Progress events use a two-digit module code plus six-digit sequence numbers with leading zeros. JavaScript events use *e_* plus non-leading zero sequence numbers.

Language Code. Language in which the event displays. You must create a unique event for each language that the message displays in.

Module. The QAD CSS program associated with the event.

Error Message. The actual message content that displays.

Description. A detailed description including the error path.

Type. Progress or JavaScript.

Clicking a command button executes one of the following actions:

- Add saves the new record to the database. All required fields—indicated by alternate field color—must be populated prior to saving a record. Before saving, the system verifies that the record is unique and displays an error if it is not.
- Cancel closes the window without adding the record.

Modifying an Error Message Entry

The Modify function of Error Message Maintenance lets an administrator modify existing error message entries. Requirements for adding a record are the same as for editing a record.

To modify an entry:

- 1

Display the record to modify.
- 2

Click the Error Number link in the row of the record to be modified. Clicking the link displays the edit screen.
- 3

Enter data into the appropriate fields. Fields that do not allow change are indicated by a second alternate color.
- 4

Click Save to commit the changes.

See field descriptions starting on page 195.

Error Action Maintenance

The Error Action Maintenance function lets administrators associate Progress events to specific QAD CSS users. Error Action Maintenance works in conjunction with Error Message Maintenance.

HTML error actions are typically alert boxes. Log error actions typically cannot be viewed through the QAD CSS interface; they are written to the Progress log file as set up during implementation. E-mail error actions send a message to a specified user or users.



Fig. 5.9
Error Alert Box

While in Error Message Maintenance, you can click the View link to display error action event details corresponding to the row.

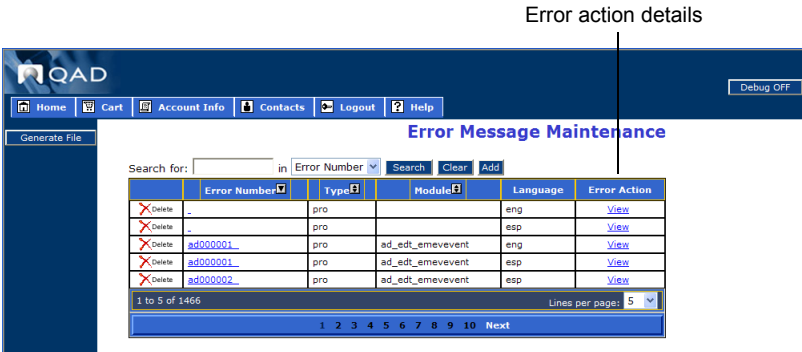


Fig. 5.10
Viewing Error
Action Details
Through Error
Message
Maintenance

Clicking the View link displays the screen in Figure 5.11.

Fig. 5.11
Error Action
Maintenance

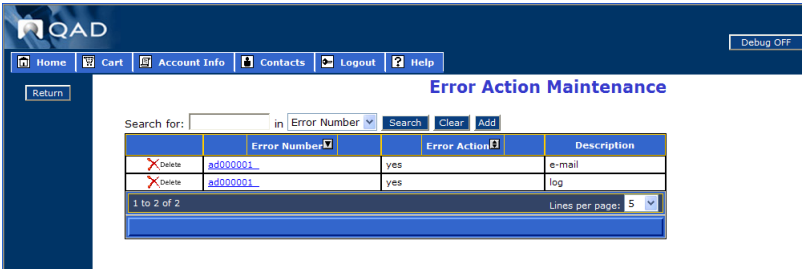


Table 5.4 summarizes the contents of the Error Action Maintenance navigation screen.

Table 5.4
Error Action
Maintenance
Navigation

Column	Search	Search Type	Sort	Description	Link
Error Number	Y	Begins	Y	Unique identifier of the event.	Y
Error Action	Y	Begins	Y	This indicates the error action being active.	N
Description	N	n/a	N	A brief description that provides a level of recognition for administrators.	N

Adding an Error Action Entry

The Add function of Error Action Maintenance lets an administrator add custom event entries. Event entries must be available programmatically to be activated.

To create a new entry:

- 1 Click Add in the navigation window to display the edit screen in Add mode.
- 2 Enter data into the appropriate fields.
- 3 Click Add in the edit window to save the record.

Note This creates a record but will not activate an event. Custom development is required to implement events.

Fig. 5.12
Detail Edit Error
Action

Error Number. A unique identifier for the event. This must be unique among error numbers. This is the link to the error message.

Action Code. Type of action to be taken. Select E-Mail, Log, or HTML from the drop-down list. To set up multiple actions, a new error action must be created.

Activate. When this option is selected, this event will occur.

Error E-Mail Event. Enter the e-mail event for the error action that you previously defined.

Description. A detailed description for administrators to identify the event. This will not be seen by the end user. End user information is set up in Error Message Maintenance.

Clicking a command button executes one of the following actions:

- Add saves the new record to the database. All required fields—indicated by alternate field color—must be populated prior to saving a record. Before saving, the system verifies that the record is unique and displays an error if it is not.
- Cancel closes the window without adding the record.

Modifying an Error Action Entry

The Modify function of Error Action Maintenance lets an administrator modify existing error action entries. Requirements for adding a record are the same as for editing a record.

To modify an entry:

- 1 Display the record to modify.
- 2 Click the Error Number link in the row of the record to be modified. Clicking the link displays the edit screen.
- 3 Enter data into the appropriate fields. Fields that do not allow change are indicated by a second alternate color.
- 4 Click Save to commit the changes.

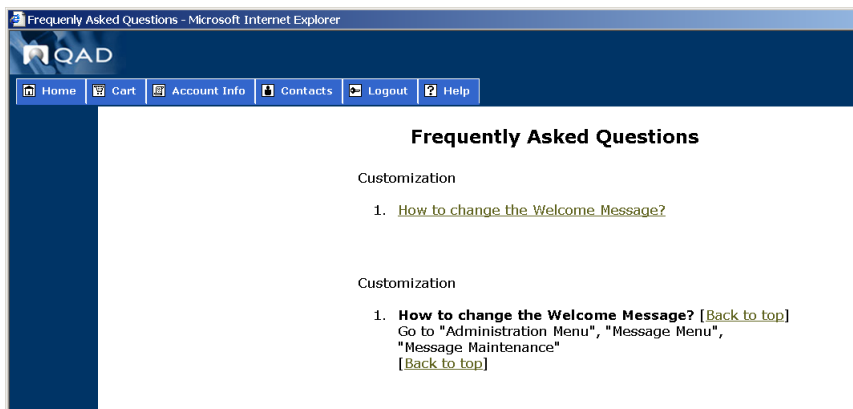
▶ See field descriptions starting on page 198.

FAQ Category Maintenance

Use FAQ (Frequently Asked Questions) Category Maintenance to set up the FAQ pages and the categories related to those pages. FAQ categories define distinct classes to which FAQs of similar concepts belong. Categories must be created prior to use in FAQ Maintenance.

Correctly using and populating the FAQ will reduce QAD CSS administrative support. End users will appreciate the immediate conclusion to issues that could otherwise prevent them from using the system or cause them to spend time on the phone or waiting for e-mail feedback.

Fig. 5.13
Frequently Asked
Questions Grouped
by Category



The menu location of FAQ Category Maintenance is Home Menu|Administration Menu|Messages Menu|FAQ Category Maintenance.

Note Consider permitting your sales support center to access this function to add FAQ content.

Clicking the FAQ Category Maintenance menu option displays the screen in Figure 5.14.

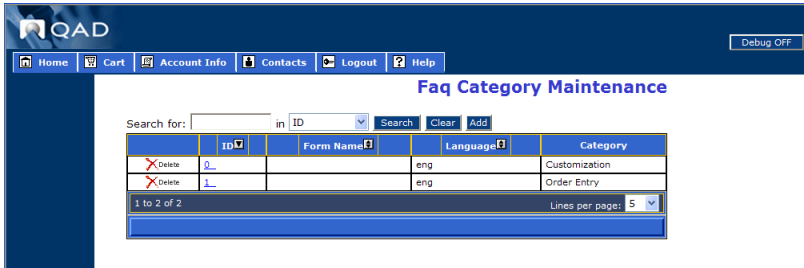


Fig. 5.14
FAQ Category Maintenance

Table 5.5 summarizes the contents of the FAQ Category Maintenance navigation screen.

Column	Search	Search Type	Sort	Description	Link
ID	Y	Exact	Y	The unique ID of the FAQ class.	Y
Form Name	Y	Begins	Y	Leave this field blank to use the standard form in QAD CSS. This field is used only when customized forms have been added.	N
Language	Y	Begins	Y	Identifies the language of the FAQ category.	N
Category	N	n/a	N	The display name of the category on the FAQ form.	N

Table 5.5
FAQ Category Maintenance Navigation

Related QAD CSS functions:

- FAQ Maintenance
 - Security Group Maintenance
 - Menu Button Maintenance
 - Menu Maintenance
 - User Maintenance
 - Language Control Maintenance
- ♦ See page 203.
 - ♦ See page 58.
 - ♦ See page 92.
 - ♦ See page 97.
 - ♦ See page 66.
 - ♦ See page 176.

Adding a FAQ Category Entry

The Add function of FAQ Category Maintenance lets an administrator add FAQ categories to QAD CSS. FAQ categories allow an administrator to define distinct FAQ classes to which FAQs of similar concepts belong.

To create a new entry:

- 1 Click Add in the navigation window to display the edit screen in Add mode.
- 2 Enter data into the appropriate fields.
- 3 Click Add in the edit window to save the record.

Fig. 5.15
Detail Edit FAQ
Category

The screenshot shows a web browser window titled "Edit FAQ Category - Microsoft Internet Explorer". The main content area is titled "Detail Edit FAQ Category". It contains the following fields and controls:

- ID:** A text input field with the value "1".
- Category:** A text input field.
- Form Name:** A text input field.
- Sort Order:** A text input field.
- Language Code:** A dropdown menu currently showing "US English".
- Buttons:** "Add" and "Cancel" buttons located below the Language Code dropdown.

ID. The unique ID of the FAQ class.

Category. The display name of the category on the FAQ form.

Form Name. Leave this field blank to use the standard QAD CSS form. Adding additional forms requires customization development.

Sort Order. The order in which this category displays in relation to other categories on the FAQ form.

Language. Identifies the language of the FAQ category.

Note The language code field is only editable in a multiple-language implementation of QAD CSS. In single-language implementations, this field is always stored as a blank in the database.

Clicking a command button executes one of the following actions:

- Add saves the new record to the database in the `wpro_faqlcategory` table. All required fields—indicated by alternate field color—must be populated prior to saving a record. Before saving, the system verifies that the record is unique and displays an error if it is not.
- Cancel closes the window without adding the record.

Modifying a FAQ Category Entry

The Modify function of FAQ Category Maintenance lets an administrator modify existing FAQ category entries. Requirements for adding a record are the same as for editing a record.

To modify an entry:

- 1 Display the record to modify.
- 2 Click the ID link in the row of the record to be modified. Clicking the link displays the edit screen.
- 3 Enter data into the appropriate fields. Fields that do not allow change are indicated by a second alternate color.
- 4 Click Save to commit your changes.

▶ See field descriptions starting on page 202.

FAQ Maintenance

FAQ (Frequently Asked Questions) Maintenance lets an administrator create multiple question and answer Web pages. These pages are both informational and instructional, usually presented in a question and answer format. The intent of this informational service is to reduce the help desk support requirements of a Web application. It is recommended that the FAQ be given high visibility on all Web pages—for example, on the QAD CSS menu bar.

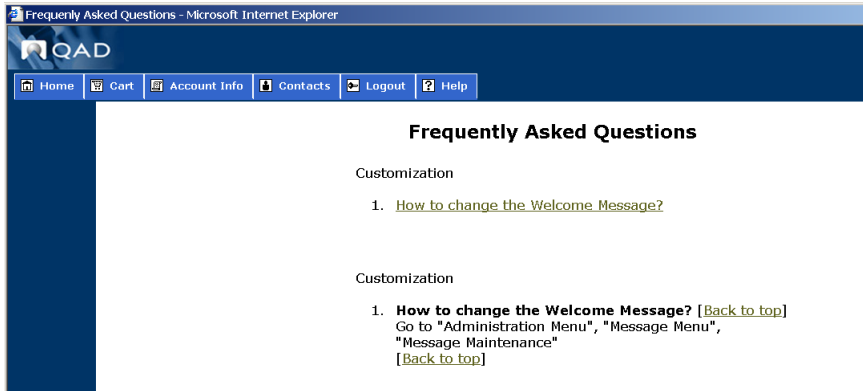
A common approach to building FAQ pages is to compile a list of useful information that will be presented on the Web site. Next, build the leading questions that will easily direct the user to the answers the site provides. It may be necessary to create several questions to the same answer to address different user perspectives.

See “FAQ Category Maintenance” on page 200 for details.

As the number of FAQs increases, you can divide the information into categories related to the business policies of the Web site. Categories must be created in FAQ Category Maintenance before they are available in FAQ Maintenance.

Regular reviews of FAQ content should be part of a normal content revision cycle.

Fig. 5.16
Frequently Asked Questions and Answers



The menu location of FAQ Maintenance is Home Menu|Administration Menu|Messages Menu|FAQ Maintenance.

Note Consider permitting your sales support center to access this function to add FAQ content.

Clicking the FAQ Maintenance menu option displays the screen in Figure 5.17.

Fig. 5.17
FAQ Maintenance

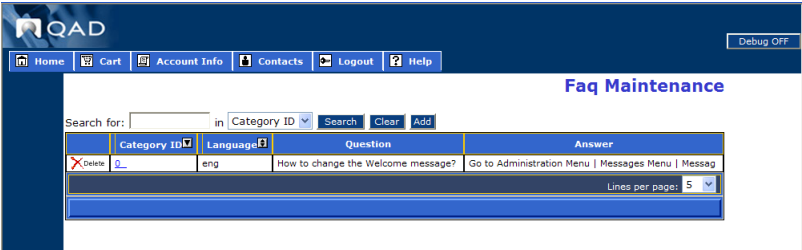


Table 5.6 summarizes the contents of the FAQ Maintenance navigation screen.

Column	Search	Search Type	Sort	Description	Link
Category ID	Y	Exact	Y	Distinct classes to which FAQs of similar concepts belong.	Y
Language	Y	Begins	Y	Identifies the language of the FAQ text.	N
Question	N	n/a	N	The leading question to the specific information contained in the answer.	N
Answer	N	n/a	N	Clear and concise information that satisfies the question.	N

Table 5.6
FAQ Maintenance
Navigation

Note The user will only see FAQs in the user’s language.

Related QAD CSS functions:

- FAQ Category Maintenance
 - Security Group Maintenance
 - Menu Button Maintenance
 - Menu Maintenance
 - User Maintenance
 - Language Control Maintenance
- See page 200.
 - See page 58.
 - See page 92.
 - See page 97.
 - See page 66.
 - See page 176.

Adding a FAQ Entry

The Add function of FAQ Maintenance lets an administrator add custom FAQs to be posted in the Frequently Asked Questions page of QAD CSS.

To create a new entry:

- 1 Click Add in the navigation window to display the edit screen in Add mode.
- 2 Enter data into the appropriate fields.
- 3 Click Add in the edit window to save the record.

Fig. 5.18
Detail Edit FAQ

The screenshot shows a web browser window titled 'Edit FAQ - Microsoft Internet Explorer'. The main content area is titled 'Detail Edit FAQ'. It contains several input fields: 'Category ID' with the value '0', 'Question' (empty), 'Answer' (empty), 'Form Name' (empty), 'Sort Order' with the value '0', and 'Language Code' with a dropdown menu showing 'US English'. At the bottom of the form are two buttons: 'Add' and 'Cancel'.

Category ID. The ID of the distinct class in which this FAQ belongs.

Question. The leading question to the specific information contained in the answer.

Answer. Clear and concise information that satisfies the question.

Form Name. Leave this field blank to use the standard QAD CSS form. Adding additional forms requires customization development.

Sort Order. The order in which the FAQs display in relation to other FAQs within a category.

Language Code. Identifies the language of the FAQ text.

Note The language code field only appears in the international version of QAD CSS. In single-language implementations, this field is always stored as a blank in the database.

Clicking a command button executes one of the following actions:

- Add saves the new record to the database in the wpro_faq table. All required fields—indicated by alternate field color—must be populated prior to saving a record. Before saving, the system verifies that the record is unique and displays an error if it is not.
- Cancel closes the window without adding the record.

Modifying a FAQ Entry

The Modify function of FAQ Maintenance lets an administrator modify existing FAQ entries. Requirements for adding a record are the same as for editing a record.

To modify an entry:

- 1 Display the record to modify.
- 2 Click the Category ID link in the row of the record to be modified. Clicking the link displays the edit screen.
- 3 Enter data into the appropriate fields. Fields that do not allow change are indicated by a second alternate color.
- 4 Click Save to commit your changes.

▶ See field descriptions starting on page 205.

Message Maintenance

The QAD CSS Message Maintenance function lets administrators associate welcome messages with specific users or groups of users. The welcome messages are usually located in the center section of the QAD CSS home page. A welcome message can be anything from a philosophical quote to a special of the day. The ability to modify messages by users is another personalization feature of QAD CSS.

An administrator can provide home messages in plain text or with HTML markup tags. If HTML tags are used, remember to apply proper syntax and test the message before releasing to a production environment.

Note QAD CSS will insert the home message content inside an HTML table cell.

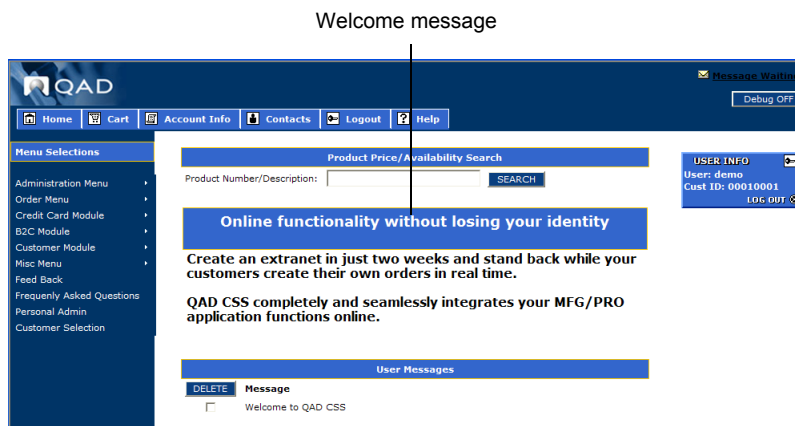


Fig. 5.19
Welcome Message
Added to Home
Page

The menu location of Message Maintenance is Home Menu|Administration Menu|Message Menu|Message Maintenance.

Note Consider permitting sales and marketing access to this function.

Clicking the Message Maintenance menu option displays the screen in Figure 5.20.

Fig. 5.20
Message
Maintenance

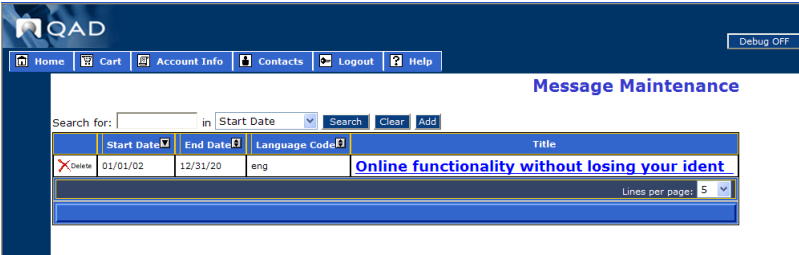


Table 5.7 summarizes the contents of the Message Maintenance navigation screen.

Table 5.7
Message
Maintenance
Navigation

Column	Search	Search Type	Sort	Description	Link
Start Date	Y	Equals	Y	First date that the message appears.	N
End Date	Y	Equals	Y	Last date the message appears.	N
Language Code	Y	n/a	Y	Language in which the message appears.	N
Title	N	n/a	N	Text title for the message entry.	Y

Related QAD CSS functions:

- QAD CSS Home Page

Adding a Message Entry

The Add function of Message Maintenance lets an administrator add custom message text to be displayed on the QAD CSS home page. The following information is required to complete this process:

- Content of the message
- The individual or group who will see the message
- The scheduled start and end dates of the message

To create a new entry:

- 1 Click Add in the navigation window to display the edit screen in Add mode.
- 2 Enter data into the appropriate fields.
- 3 Click Add in the edit window to save the record.

The screenshot shows a web browser window titled 'Message Maintenance - Microsoft Internet Explorer'. The page is titled 'Detail Message Maintenance'. It contains several input fields: 'Language Code' with a dropdown menu showing 'US English'; 'Mkt Group List' with a text input field; 'Start Date' and 'End Date' with text input fields and calendar icons; 'Title' with a text input field; and 'Body' with a large text area. At the bottom of the form are two buttons: 'Add' and 'Cancel'.

Fig. 5.21
Detail Message
Maintenance

Language Code. Select a language for the message. The message will appear only for users who run QAD CSS in the indicated language.

Marketing Group List. The target marketing group that will see the message as set up in User Maintenance. Leaving this field blank indicates that this message will be displayed to all users. Entering a single marketing group will limit the viewing of the message to only users in that marketing group. Multiple groups are not allowed in this field.

Start Date. The beginning date that the message will appear. Click the Calendar icon to select dates from a calendar.

End Date. The date after which the message will discontinue.

Title. The displayed identifier of this message.

Body. The displayed content of the message

See “Detail User Registration Editor” on page 66 for details on creating and maintaining marketing groups.

Clicking a command button executes one of the following actions:

- Add saves the new record to the database. All required fields—indicated by alternate field color—must be populated prior to saving a record. Before saving, the system verifies that the record is unique and displays an error if it is not.
- Cancel closes the window without adding the record.

Modifying a Message Entry

The Modify function of Message Maintenance lets an administrator modify existing message entries. Requirements for adding a record are the same as for editing a record.

To modify an entry:

- 1 Display the record to modify.
- 2 Click the Title link in the row of the record to be modified. Clicking the link displays the edit screen.
- 3 Enter data into the appropriate fields. Fields that do not allow change are indicated by a second alternate color.
- 4 Click Save to commit the changes.

▶ See field descriptions starting on page 208.

User Message Maintenance

Use QAD CSS User Message Maintenance to associate messages with a specific user. User messages can be used to show off a new feature, welcome a new user to the site, advertise specials, or anything specific to a user. User messages are a customization feature of QAD CSS.

▶ See “Message Maintenance” on page 207.

Messages meant to be seen by all users, or specified groups of users, are maintained in Message Maintenance.

Users will see a User Messages heading and message near the bottom of the QAD CSS home page and a message notification to the right of the browser header when messages are available. The message can be viewed by clicking the message link on the home page or the message waiting link in the header. The link on the home page will continue to display until the user deletes the message.

An administrator can provide user messages in plain text or with HTML markup tags. If HTML tags are used, proper syntax must be applied. It is recommended that messages be tested before releasing to a production environment.

Note QAD CSS will insert the user message content inside an HTML table cell.

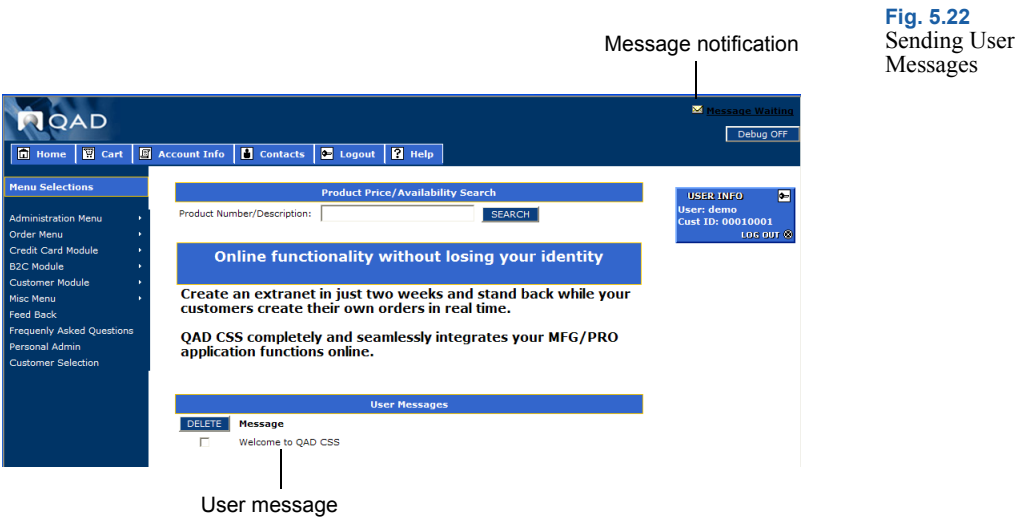


Fig. 5.22
Sending User Messages

The menu location of User Message Maintenance is Home Menu|Administration Menu|Message Menu|User Message Maintenance.

Clicking the User Message Maintenance menu option displays the screen in Figure 5.23.

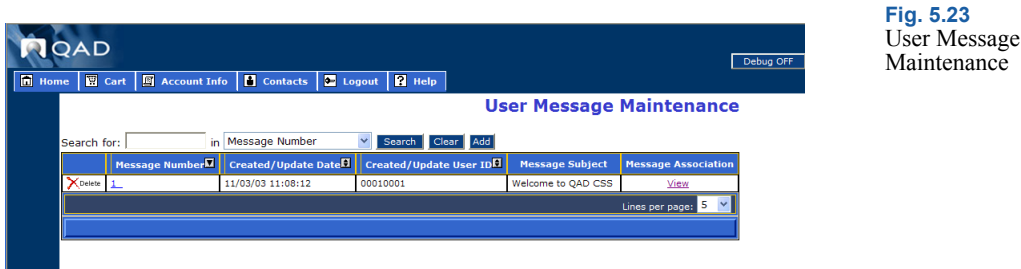


Fig. 5.23
User Message Maintenance

Table 5.8 summarizes the contents of the User Message Maintenance navigation screen.

Table 5.8
User Message
Maintenance
Navigation

Column	Search	Search Type	Sort	Description	Link
Message Number	Y	Begins	Y	Unique identifier for this message.	Y
Created/Updated Date	Y	Begins	Y	The date and time stamp that indicates the last time this message was updated.	N
Created/Updated User ID	Y	Begins	Y	The user ID of the user account responsible for adding or modifying this message.	N
Message Subject	N	n/a	N	A brief, meaningful description of the message.	N
Message Association	N	n/a	N	This hyperlink displays a screen of users that will see this message.	Y

Related QAD CSS functions:

- QAD CSS Home Page

Adding a User Message Entry

The Add function of User Message Maintenance lets an administrator add custom user message content and associate them with specific users. The following information is required to complete this process:

- The user ID for the message
- The content of the message that the user will see

To create a new entry:

- 1 Click Add in the navigation window to display the edit screen in Add mode.
- 2 Enter data into the appropriate fields.
- 3 Click Add in the edit window to save the record.

The screenshot shows a web browser window titled 'User Message Maintenance Detail - Microsoft Internet Explorer'. The main content area is titled 'Detail User Message Maintenance Detail'. It contains three text input fields: 'Message Number' (containing '002'), 'Message Subject' (containing 'Welcome to QAD C\$'), and 'Message Body' (containing 'Your new B2B Internet solutio'). Below these fields are two buttons labeled 'Add' and 'Cancel'.

Fig. 5.24
Detail User
Message
Maintenance Detail

Message Number. Unique identifier for this message.

Message Subject. A brief, meaningful description of the message.

Message Body. This is the message for the user. This can include HTML tags.

Clicking a command button executes one of the following actions:

- Add saves the new record to the database. All required fields—indicated by alternate field color—must be populated prior to saving a record. Before saving, the system verifies that the record is unique and displays an error if it is not.
- Cancel closes the window without adding the record.

Modifying a User Message Entry

The Modify function of User Message Maintenance lets an administrator modify existing user message entries. Requirements for adding a record are the same as for editing a record.

To modify an entry:

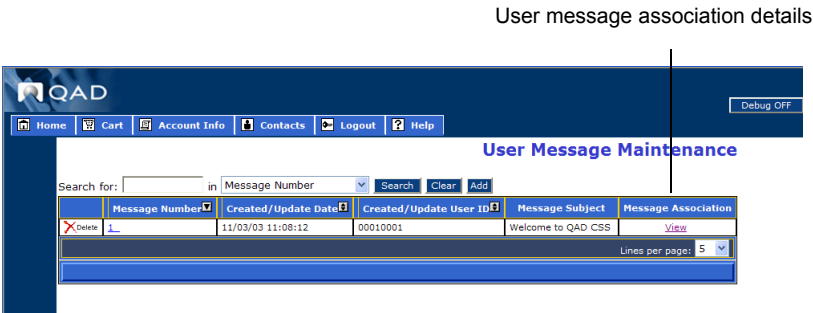
- 1 Display the record to modify.
- 2 Click the Message Number link in the row of the record to be modified. Clicking the link displays the edit screen.
- 3 Enter data into the appropriate fields. Fields that do not allow change are indicated by a second alternate color.
- 4 Click Save to commit the changes.

See field descriptions starting on page 212.

User Message Detail Maintenance

While in User Message Maintenance, you can click a View link to display and add user associations to the corresponding row.

Fig. 5.25
Viewing Message
Association Details
Through User
Message
Maintenance



Clicking a View link displays the screen in Figure 5.26.

Fig. 5.26
User Message
Detail Maintenance

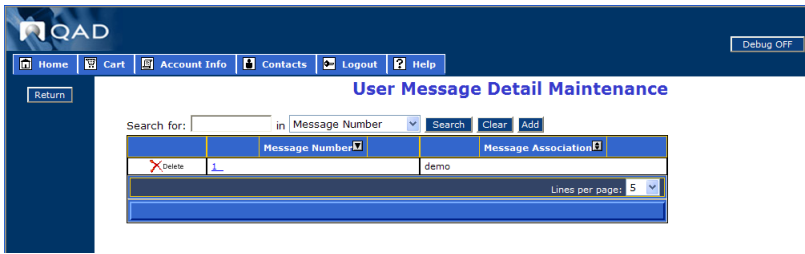


Table 5.9 summarizes the contents of the User Message Detail Maintenance navigation screen.

Table 5.9
User Message
Detail Maintenance
Navigation

Column	Search	Search Type	Sort	Description	Link
Message Number	Y	Begins	Y	Unique identifier for this message.	Y
Message Association	Y	Begins	Y	User associated with this message.	N

Adding a User Message Association Entry

The Add function of User Message Detail Maintenance lets an administrator add users and associate them with specific user messages.

To create a new entry:

- 1 Click Add in the navigation window to display the edit screen in Add mode.
- 2 Enter data into the appropriate fields.
- 3 Click Add in the edit window to save the record.

Fig. 5.27
Detail User
Message Detail
Maintenance

Message Number. The number of the corresponding message row.

User ID. A unique identifier for a QAD CSS user.

Message Deleted. When this option is selected, the message will not be displayed for this user. This field is also used to indicate that the user has deleted the corresponding user message from the browser.

Clicking a command button executes one of the following actions:

- Add saves the new record to the database. All required fields—indicated by alternate field color—must be populated prior to saving a record. Before saving, the system verifies that the record is unique and displays an error if it is not.
- Cancel closes the window without adding the record.

Modifying a User Message Association Entry

The Modify function of User Message Detail Maintenance lets an administrator modify existing user association entries. Requirements for adding a record are the same as for editing a record.

To modify an entry:

- 1** Display the record to modify.
- 2** Click the Message Number link in the row of the record to be modified. Clicking the link displays the edit screen.
- 3** Enter data into the appropriate fields. Fields that do not allow change are indicated by a second alternate color.
- 4** Click Save to commit the changes.

▶ See field descriptions starting on page 214.

The background of the page is a grayscale image of several interlocking gears. The gears are of different sizes and are positioned in a way that they appear to be meshing together. The lighting creates highlights and shadows on the teeth of the gears, giving them a three-dimensional appearance. The overall tone is technical and industrial.

Chapter 6

Reports

This chapter discusses the following administration reports:

Overview **218**

Order Processing Administration Reports **220**

Internal Order Reports **224**

Administration Reports **235**

Overview

QAD CSS provides several reports that let users view information created during the order-entry process and the administration of QAD CSS maintenance functions.

The request screens that you use to create reports share common features. Report fields let you enter selection criteria for the report that limits the search. Entering search criteria for a report is optional. Fields left blank automatically use the default values found in `reports_global.i`. In addition, the report uses all entered parameters to limit the results of the report.

Fig. 6.1
Sample Report
Request Screen

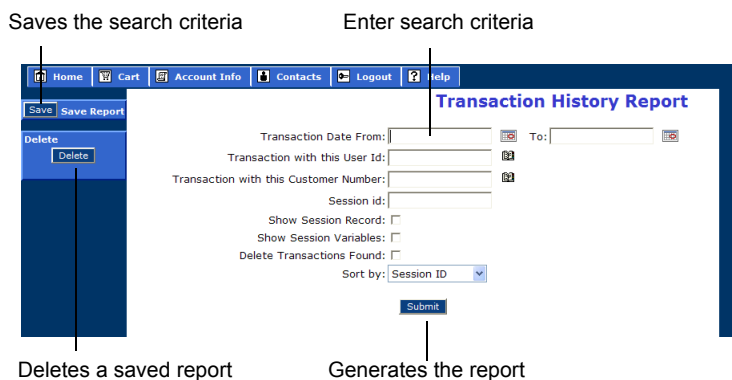
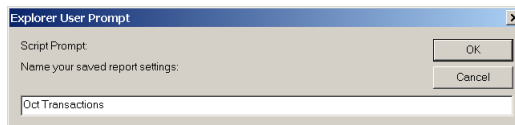


Figure 6.1 illustrates a sample report screen in QAD CSS. Report screens open with the same type of display with one or more fields that let users enter search criteria to limit the results of the report.

Save. Click Save to open a window that lets you save the generated report using the entered search criteria.

Fig. 6.2
Saving Report
Settings



See “Saved Report Maintenance” on page 110.

QAD CSS provides a maintenance function for creating and modifying saved reports.

Delete. Select the check box next to one or more saved reports and then click Delete to delete the report.

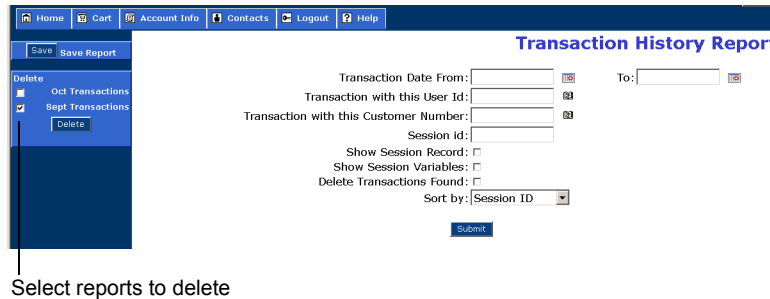


Fig. 6.3
Deleting Saved Reports

Submit. Click Submit to generate the report using the entered search criteria.

After you click Submit, a separate report screen displays.

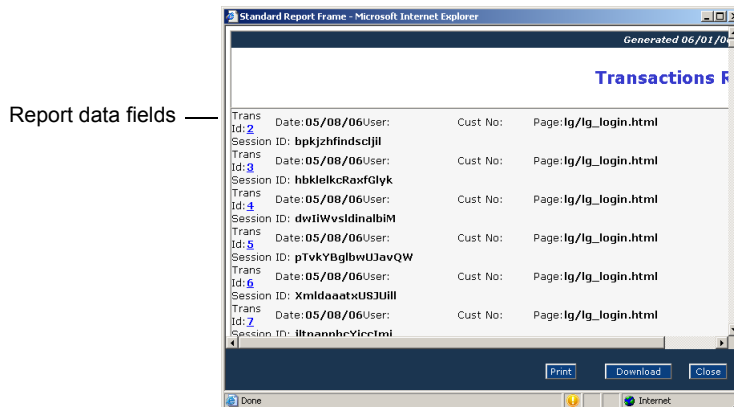


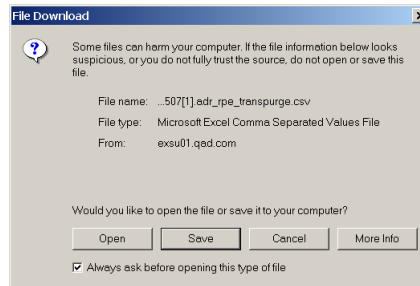
Fig. 6.4
Sample Report Screen

Report Data Fields. Return data according to the selection criteria in the report request screen.

Print. Click Print to print the report.

Download. Click Download to open a window that lets you save the generated report as a comma-separated values (.csv) file. This button is not available on all reports.

Fig. 6.5
File Download
Screen



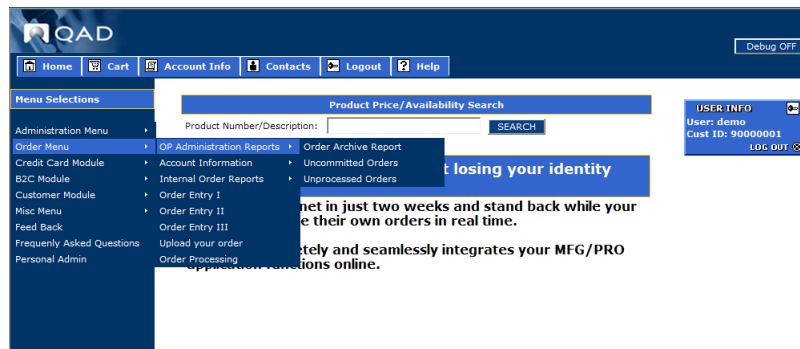
Close. Click Close to close the report screen without saving.

Order Processing Administration Reports

Use order processing administration reports to view information related to orders received from customers.

The menu location of order processing administration reports is Home Menu|Order Menu|OP Administration.

Fig. 6.6
OP Administration
Reports Menu



Order processing administration reports include the following:

- Order Archive Report
- Uncommitted Orders
- Unprocessed Orders

Order Archive Report

Use Order Archive Report to view orders received through QAD CSS and successfully committed to MFG/PRO. When orders are successfully committed to MFG/PRO, they are deleted from the QAD CSS order tables. Depending on the Archive Orders setting in Order Control Maintenance, orders can be archived in QAD CSS before being deleted. This report is used to view these archived orders. In addition, this report serves as a maintenance function to delete orders from QAD CSS.

▶ See “Archive Orders” on page 145.

Clicking the Order Archive Report menu option displays the screen in Figure 6.7.

Fig. 6.7
Order Archive
Report Request
Screen

Warning This report may take an extended period of time to execute when submitted with no criteria to limit the results.

The Order Archive Report request screen lets users find orders using the data source (eB2.1 only), order number, order date, and customer number searches. Search results will show only the orders matching the search criteria.

- 1 If you are using MFG/PRO eB2.1, choose the data source that represents the domain where items on the orders to be reported are located.
- 2 Enter the order number range for the report. Order numbers are assigned by QAD CSS. If QAD CSS is not being used, then order numbers assume the format and sequence from MFG/PRO. When these fields are left blank, this parameter is not used to limit the result.
- 3 Enter all or part of the order date range for the report.
- 4 Enter a valid customer number to limit the report to orders for that customer only.

- 5 Indicate whether to delete archived orders no longer needed. Only the orders shown on the report will be deleted.

Important When selection criteria are not specified, all archived orders will be deleted when the Delete option is selected.

- 6 Click Submit to generate the report according to the selection criteria.

Uncommitted Orders Report

See “Order Control Maintenance” on page 141.

Use Uncommitted Orders to view orders that have been entered but not submitted by customers. These orders are created when Recover Orders is Yes in Order Control Maintenance. When this field is Yes, the system saves orders so that if the order entry process is interrupted—for example, when the customer loses their Internet connection—the customer can return to the site and the order information is available to complete.

This report can be used to view how many orders are waiting to be recovered. In addition, this report serves as a maintenance function to purge abandoned orders from the database.

Note To prevent excessive database growth, system administrators should periodically perform this function to purge abandoned orders from the system.

Clicking the Uncommitted Orders Report menu option displays the screen in Figure 6.8.

Fig. 6.8
Uncommitted
Orders Request
Screen

The Uncommitted Orders request screen lets users find orders using order date and customer number searches. Search results will only show the orders matching the search criteria.

- 1 Enter a valid date or use the calendar browse for the date selection.
- 2 Enter a valid customer number to view all uncommitted orders for a particular customer.

- 3 Indicate whether to delete the uncommitted orders no longer needed. When the Delete option is selected, only the transactions shown on the report will be deleted.

Important When selection criteria are not specified, all uncommitted orders will be deleted.

- 4 Click Submit to generate the report according to the selection criteria.

Unprocessed Orders Report

Use Unprocessed Orders to view all orders submitted by customers but not yet committed to MFG/PRO. The orders shown here are the same orders displayed in Order Processing. This report can be used to view how many orders are waiting to be committed.

Note If the system is set up to commit orders directly to MFG/PRO, no orders will be found here.

Clicking the Unprocessed Orders menu option displays the screen in Figure 6.9.

Fig. 6.9
Unprocessed
Orders Request
Screen

The Unprocessed Orders request screen lets users find orders using order number and order date searches. Search results will only show orders matching the search criteria.

- 1 Enter the order number range for the report. Order numbers are assigned by QAD CSS. If QAD CSS is not being used, order numbers assume the format and sequence from MFG/PRO. When these fields are left blank, all orders will be considered.
- 2 Enter all or part of the order date range for the report.
- 3 Click Submit to generate the report according to the selection criteria.

Report Links

The Unprocessed Orders single-line display summary provides an order number link to view complete details about the order.

Related QAD CSS functions:

- Order Processing
- Open Sales Order Report

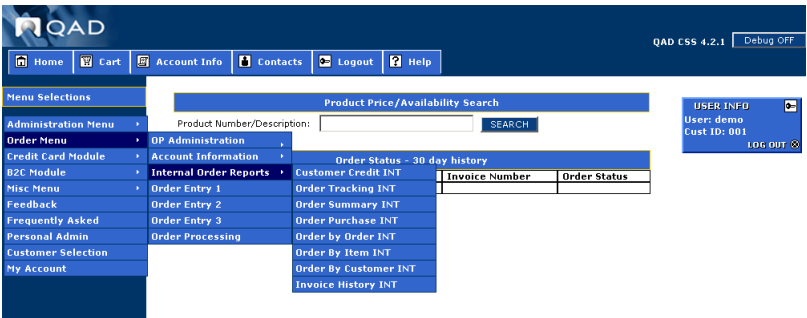
Internal Order Reports

Use internal order reports to view summary or detailed customer order information.

The promise date and/or due date can be displayed on the header and order line for internal order reports menu. This display is determined by the *showDueOrPromDate* setting in the system registry. See “showDueOrPromDate” on page 275 for details on this setting.

The menu location of internal order reports is Home Menu|Order Menu|Internal Order Reports.

Fig. 6.10
Internal Order
Reports Menu



Internal order reports include the following:

- Customer Credit INT
- Order Tracking INT
- Order Summary INT
- Order Purchase INT
- Order by Order INT

- Order by Item INT
- Order by Customer INT
- Invoice History INT

Customer Credit INT

Use Customer Credit INT to view detailed customer credit information.

Clicking the Customer Credit INT menu option displays the screen in Figure 6.11.

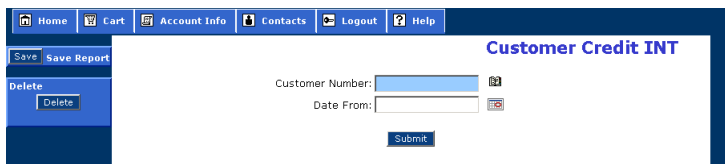


Fig. 6.11
Customer Credit
INT Request
Screen

The Customer Credit INT request screen lets users specify a customer and a start date from which to generate the credit report for that customer.

- 1 Enter the customer number for which you want to generate the credit report. This is a required field.
- 2 Enter a valid date or use the calendar browse for the date selection.
- 3 Click Submit to generate the report according to the selection criteria.

Fig. 6.12
Customer Credit
INT Report

Standard Report Frame - Microsoft Internet Explorer

Generated 05/25/06 by demo

Customer Credit INT

Bill-To: 1001000 Reliable Central Purchasing

Credit Limit: \$ 75,000.00 USD
Current Balance: \$ 69,287.81 USD
Available Credit: \$ 5,712.19 USD
Currency: USD

Account Aging

Current	Past Due 1 - 30	Past Due 31 - 60	Past Due 61 +
\$ 0.00 USD	\$ 0.00 USD	\$ 0.00 USD	\$ 69,287.81 USD

Invoice

Invoice Date	Reference	PO#	Type	Invoice Due Date	Original Amount	Amount Open
03/04/94	1Y300007		Invoice	04/03/94	27,217.81	27,217.81
03/04/94	1Y300006		Invoice	04/03/94	10,395.00	10,395.00
10/21/93	300005		Invoice	11/20/93	14,673.00	14,673.00
10/20/93	300002		Invoice	11/19/93	4,323.00	4,323.00
10/20/93	300001		Invoice	11/19/93	5,879.00	5,879.00
06/01/92	10007	PO- 3333	Invoice	07/01/92	6,800.00	6,800.00
Balance from before 01/01/1900						0.00

Print Close

Order Tracking INT

Use Order Tracking INT to view detailed order tracking information.

Clicking the Order Tracking INT menu option displays the screen in Figure 6.13.

Fig. 6.13
Order Tracking
INT Request
Screen

Home Cart Account Info Contacts Logout Help

Save Save Report

Delete Delete

Order Tracking INT

Customer Number: 

Order Number: 

Purchase Order: 

Show Lot/Serial Numbers Shipped: ☐

Submit

The Order Tracking INT request screen lets users specify sales order number or purchase order number of which to view detailed tracking information.

- 1 Enter a valid customer number to limit the report to orders for that customer only.
- 2 Enter either a sales order number or a PO number.
- 3 Click Submit to generate the report according to the selection criteria.

Fig. 6.14
Order Tracking
INT Report

Standard Report Frame - Microsoft Internet Explorer
Generated 05/25/06 by demo

Order Tracking INT

Invoice History
10007 Sales Order: 10007

Ship-To: Westwood Reliable
Westwood Shopping Center
77 Sunset Strip
Westwood CA 90029
United States of America
Telephone: 213-923-0293

Customer: Reliable Central Purchasing
Attention: Accounts Payable
300000020 Century Blvd
Los Angeles CA 90000
United States of America
Telephone: 213-920-0394

Inv Date: 05/02/92 **Req Date:** 05/01/92 **Order Date:** 05/01/92
PO: PO-3333 **Ship Via:** CONSOLIDATED **Ship Date:** 05/02/92 **Quote:** 100004
BOL: **Status:**

Due Date: 05/02/92

Ln	Item Number	Site	UN	Ordered	Qty In Process	Price	Extended Price	Due Date
1	90-100 KOOLAIR(TM) COOLANT STANDARD ,SCENTED	10000	EA	1,000.0	Allocated 0.0 Picked 0.0 Shipped 1,000.0 Qty Inv. 1,000.0	\$ 6.70 USD	\$ 6,700.00 USD	05/02/92
Base Total							\$ 6,700.00 USD	

Print Close

Order Summary INT

Use Order Summary INT to view summary order information.

Clicking the Order Summary INT menu option displays the screen in Figure 6.15.

Fig. 6.15
Order Summary
INT Request
Screen

Home Cart Account Info Contacts Logout Help

Save Save Report

Delete Delete

Order Summary INT

Customer Number From: To:

Order Number From: To:

Order Date From: To:

Submit

The Order Summary INT request screen lets users find orders by using customer number, order number, and date searches. Search results will show only the orders matching the search criteria.

- 1 Enter the customer number range for the report.
- 2 Enter the order number range for the report. The format of the order number depends on settings in Order Control Maintenance. When these fields are left blank, this parameter is not used to limit the result.
- 3 Enter the order date range for the report.
- 4 Click Submit to generate the report according to the selection criteria.

See “Order Control Maintenance” on page 141.

Fig. 6.16
Order Summary
INT Report

Standard Report Frame - Microsoft Internet Explorer

Generated 05/25/06 by demo

Order Summary INT

10001 Summary [Copy Order](#)

Sold-To: Colossal Conglomerates LTD Suite 1000 Colossal Building Colossal Industrial Park Evanston IL 090876 United States of America Telephone: 1-800- 333-9000	Bill-To: Colossal Conglomerates LTD Suite 1000 Colossal Building Colossal Industrial Park Evanston IL 090876 United States of America Telephone: 1-800- 333-9000	Ship-To: Colossal Conglomerates LTD Suite 1000 Colossal Building Colossal Industrial Park Evanston IL 090876 United States of America Telephone: 1-800- 333-9000

Order Date: 01/25/98 **Currency:** USD **SalesPerson(s):** Willy Loman Incorporated
Parker, Janet

Due Date: 05/02/98

Line	Item	UM	Quantity Ordered	Quantity Open	Quantity Allocated	Quantity Picked	Quantity Shipped	Due Date
1	10-10000	EA	5	5	0	0	0	05/02/98
2	90-100	EA	50	50	50	0	0	01/26/98
3	90-110	EA	200	200	0	0	0	01/26/98

10012 Summary [Copy Order](#)

Sold-To: Colossal Conglomerates LTD	Bill-To: Colossal Conglomerates LTD	Ship-To: Colossal Conglomerates LTD

Print Close

Order Purchase INT

Use Order Purchase INT to view detailed purchase information.

Clicking the Order Purchase INT menu option displays the screen in Figure 6.17.

Fig. 6.17
Order Purchase
INT Request
Screen

Home Cart Account Info Contacts Logout Help

Save Save Report

Delete Delete

Order Purchase INT

Customer Number From:	To:
Order From:	To:
Order Date From:	To:

Include Invoiced Orders: ☒ Include Non-Invoiced Orders: ☒
Show Standard Orders: ☒ Show QAD CSS Orders: ☒
Show Order Detail: ☐

Submit

The Order Purchase INT request screen lets users find orders by using customer number, order number, and date searches. Search results will show only the orders matching the search criteria.

- 1 Enter the customer number range for the report.
- 2 Enter the order number range for the report.

- 3 Enter the order date range for the report.
- 4 Indicate whether to include invoiced orders in the report.
- 5 Indicate whether to include non-invoiced orders in the report.
- 6 Indicate whether to show standard orders in the report.
- 7 Indicate whether to show QAD CSS orders in the report.
- 8 Indicate whether to show order details in the report.
- 9 Click Submit to generate the report according to the selection criteria.

Standard Report Frame - Microsoft Internet Explorer

Generated 05/25/06 by demo

Order Purchase INT

Invoice Number	Order Number	PO Number	Order Date	Order Status
10001	10000	PO-1000	06/12/92	
10002	10002	po-1000	06/12/92	
10003	10003		06/12/92	
10004	10004		06/12/92	
10005	10005		06/12/92	
10006	10006	po-1000	05/01/92	
10007	10007	PO-3333	05/01/92	
10008	10008	PO-00909	05/01/92	
300000	10016		10/20/93	
300001	10017		10/20/93	
300002	10018		10/20/93	
300003	10020		10/20/93	
300004	10022		10/21/93	
300005	10023		10/21/93	
IV300006	SO10029		02/15/94	
IV300007	SO10030		03/04/94	
	10001		01/25/98	HD

Print Close

Done Internet

Fig. 6.18
Order Purchase
INT Report

Order by Order INT

Use Order by Order INT to view detailed order information grouped by sales order.

Clicking the Order by Order INT menu option displays the screen in Figure 6.19.

Fig. 6.19
Order by Order INT
Request Screen

The screenshot shows the 'Order by Order INT' request screen. The interface includes a top navigation bar with links for Home, Cart, Account Info, Contacts, Logout, and Help. A left sidebar contains buttons for Save, Save Report, Delete, and a sub-button Delete. The main area is titled 'Order by Order INT' and features several search criteria fields: 'Customer Number From' and 'To', 'Sales Order From' and 'To', 'Due Date From' and 'To', and 'Purchase Order From' and 'To'. Each field has a small icon to its right. Below these fields are five checkboxes: 'Include Allocated', 'Include Picked', 'Include Unprocessed', 'Display Comments', and 'Include Shipped'. A 'Submit' button is located at the bottom right of the form area.

The Order by Order INT request screen lets users find orders using customer number, sales order, date, and purchase order searches, and define a number of information options to be included in the report. Search results will show only the orders matching the search criteria.

- 1 Enter the customer number range for the report.
- 2 Enter the sales order number range for the report.
- 3 Enter the due date range for the report.
- 4 Enter the purchase order number range for the report.
- 5 Indicate whether to include allocated, picked, unprocessed, and shipped items in the report.
- 6 Indicate whether to display comments in the report.
- 7 Click Submit to generate the report according to the selection criteria.

Standard Report Frame - Microsoft Internet Explorer

Generated 05/25/06 by demo

Order by Order INT

Sales Order: 10001

Sold-To: Colossal Conglomerates LTD
Suite 1000 Colossal Building
Colossal Industrial Park
Evanston IL 090876
United States of America
Telephone: 1-800-333-9000

Ship-To: Colossal Conglomerates LTD
Suite 1000 Colossal Building
Colossal Industrial Park
Evanston IL 090876
United States of America
Telephone: 1-800-333-9000

Order Date: 01/25/98 **PO:** **Status:** HD **Quote:**
Disc %: 0.00 **Cur:** USD **Exchange Rate:** 1.00000 **Terms:** 30

ALL SHIPMENTS PER CORP CONTRACT A-009091 **Salespersons:** Willy Loman Incorporated
Parker, Janet

THE FOLLOWING NOTES ARE TO BE ASSOCIATED WITH ALL SALES ORDERS WITH CUSTOMER 01000000 : WARNING ! ALL CONTAINERS MUST BE TREATED IN ACCORDANCE WITH SPECIFICATION NUMBER 109-PP/9876*1000#7000.2. SUBSEQUENT TO COBALT IRRADIATION PACKAGING MATERIALS WILL BE INSPECTED FOR GLAZING AND SEAM INTEGRITY. IN THE EVENT THAT THE TREATMENT CAUSES THE CONTAINER TO GLOW IN THE DARK.

Print Close

Fig. 6.20
Order by Order INT Report

Order by Item INT

Use Order by Item INT to view detailed order information grouped by item.

Clicking the Order by Item INT menu option displays the screen in Figure 6.21.

Home Cart Account Info Contacts Logout Help

Save Save Report

Delete Delete

Order By Item INT

Customer Number From: To:

Item Number From: To:

Order Number From: To:

Due Date From: To:

Include Picked: ☒ Include Allocated: ☒
Include Shipped: ☒ Include Unprocessed: ☒

Submit

Fig. 6.21
Order by Item INT Request Screen

The Order by Item INT request screen lets users find orders using the customer number, item number, and order number searches. Search results will show only the orders matching the search criteria.

- 1 Enter the customer number range for the report.
- 2 Enter the item number range for the report.
- 3 Enter the order number range for the report.
- 4 Enter the due date range for the report.

- 5 Indicate whether to include allocated, picked, unprocessed, and shipped items in the report.
- 6 Click Submit to generate the report according to the selection criteria.

Fig. 6.22
Order by Item INT
Report

Standard Report Frame - Microsoft Internet Explorer

Generated 05/25/06 by demo

Order By Item INT

10-10000
OASIS(TM) COOLING SYSTEM
HOME/INDUST MODEL
Due Date: 06/01/94

Order Number	Ln	Sold-To	Quantities	C	Price	Ext Price	Due Date	T
10001	1	01000000	Allocated 0.0 EA Picked 0.0 EA Open 5.0 EA		\$ 4,800.00 USD	\$ 24,000.00 USD	05/02/98	
SO10025	1	01000000	Allocated 0.0 EA Picked 0.0 EA Open 100.0 EA		\$ 4,320.00 USD	\$ 432,000.00 USD	03/03/94	
SO10026	1	01000000	Allocated 0.0 EA Picked 0.0 EA Open 125.0 EA		\$ 4,320.00 USD	\$ 540,000.00 USD	03/03/94	
SO10027	1	1001000	Allocated 0.0 EA Picked 0.0 EA Open 50.0 EA		\$ 4,320.00 USD	\$ 216,000.00 USD	03/03/94	
SO10028	1	10010001	Allocated 0.0 EA Picked 0.0 EA		\$ 4,320.00 USD	\$ 216,000.00 USD	03/03/94	

Print Close

Order by Customer INT

Use Order by Customer INT to view detailed order information grouped by customer.

Clicking the Order by Customer INT menu option displays the screen in Figure 6.23.

Fig. 6.23
Order by Customer
INT Request
Screen

Home Cart Account Info Contacts Logout Help

Save Save Report

Delete Delete

Order By Customer INT

Customer Number From: To:

Order Number From: To:

Order Date From: To:

Purchase Order From: To:

Include Picked: ☒ Include Allocated: ☒

Display Comments: ☐ Include Shipped: ☒

Include Unprocessed: ☒ Show Details: ☐

Submit

The Order by Customer INT request screen lets users find orders using the customer number, order number, order date, and purchase order number searches. Search results will show only the orders matching the search criteria.

- 1 Enter the customer number range for the report.
- 2 Enter the order number range for the report.
- 3 Enter the order date range for the report.
- 4 Enter the purchase order number range for the report.
- 5 Indicate whether to include allocated, picked, unprocessed, and shipped items in the report.
- 6 Indicate whether to display comments in the report.
- 7 Indicate whether to show details in the report.
- 8 Click Submit to generate the report according to the selection criteria.

Standard Report Frame - Microsoft Internet Explorer

Generated 05/25/06 by demo

Order By Customer INT

001 - PEI Computers Ltd.										
Order	PO	Ship-To	Order Date	St	Cur	Exchange Rate	Quote	Disc %	Due Terms	Due Date
476		001	04/28/95		USD	1		0	2/10-30	
486		001	04/28/95		USD	1		0	2/10-30	
SO10043		001	05/15/06		USD	1		0	2/10-30	

01000000 - Colossal Conglomerates LTD										
Order	PO	Ship-To	Order Date	St	Cur	Exchange Rate	Quote	Disc %	Due Terms	Due Date
10001		01000000	01/25/98	HD	USD	1		0	30	
10012		01000000	10/05/98	HD	USD	1		0	30	
10013		Dock-001	10/05/93		USD	1		0	30	
SO10025		01000000	03/02/94		USD	1		0	30	
SO10026		01000000	03/02/94		USD	1		0	30	
SO10042		01000000	05/15/06	HD	USD	1		0	30	

Print Close

Done Internet

Fig. 6.24
Order by Customer
INT Report

Invoice History INT

Use Invoice History INT to view invoice history information.

Clicking the Invoice History INT menu option displays the screen in Figure 6.25.

Fig. 6.25
Invoice History
INT Request
Screen

The screenshot shows the 'Invoice History INT' request screen. At the top is a navigation bar with links for Home, Cart, Account Info, Contacts, Logout, and Help. Below this is a sidebar with buttons for Save, Save Report, Delete, and a sub-button Delete. The main area is titled 'Invoice History INT' and contains four search criteria, each with a 'From' and 'To' field: Customer Number, Invoice Number, Order Number, and Purchase Order. A 'Submit' button is located at the bottom right of the search area.

The Invoice History INT request screen lets users find invoices using the customer number, invoice number, order number, and purchase order number searches. Search results will show only the orders matching the search criteria.

- 1 Enter the customer number range for the report.
- 2 Enter the invoice number range for the report.
- 3 Enter the order number range for the report.
- 4 Enter the purchase order number range for the report.
- 5 Click Submit to generate the report according to the selection criteria.

- Action Icons Report
- Browse Master Report
- Customer Master Report
- Data Translation Report
- Documentation Master Report
- E-Mail Address Report
- E-Mail Event Journal Report
- Error Message Master Report
- Item Master Report
- Module Report
- System Module Report
- System Registry Report
- Security Group Report
- Super Layer Report
- Transaction History Report
- Module Security Report
- User Master Report
- Module Hierarchy Report
- Credit Card Transaction Report

Action Icons

Use Action Icons Report to view icons and their corresponding actions. This report does not return information on icons used for information purposes only.

Clicking the Action Icon Report menu option displays the screen in Figure 6.28.

Fig. 6.28
Action Icons
Report Request
Screen

- 1 Enter the range of icon names to include in the report. Leave blank to include all icons defined in the system.
- 2 Click Submit to generate the report.

Icon Name	Description	Link	Count
banner		./banner	5 20
Log in	Log in	./log_in	2 2
Logo	Company logo	./logo.gif	5 5

This report was generated by QAD CSS.
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Fig. 6.29
Action Icons
Report

Related QAD CSS functions:

- Icon Maintenance

See page 79.

Browse Master Report

Use Browse Master Report to view QAD CSS browse documents and, optionally, detailed information for each browse.

Clicking the Browse Master Report menu option displays the screen in Figure 6.30.

Fig. 6.30
Browse Master
Report Request
Screen

The Browse Master Report request screen lets users find browses using browse name, module, and title searches. Search results will only show browses matching the search criteria.

- 1 Enter all or part of the browse name to include in the search. Leave blank to search for all browses.
- 2 Enter the name of the module in which the browse is used. Leave blank to include all modules.
- 3 Enter all or part of the browse title.
- 4 Indicate whether to include browse details. Select Include Details to display detailed information for each browse included in the report.

5 Click Submit to generate the report.

When the option to include browse details is selected, the search results in a report screen similar to Figure 6.31.

Fig. 6.31
Browse Report
With Details



When generating a browse report without including details, the search results in a report screen similar to Figure 6.32.

Fig. 6.32
Browse Report
Without Details

Browse Name	Browse Module	Browse Title
AddressCity	cm/cm_edt_cm_mstr.html	City
AddressCity	so/so_edt_admstr.html	City
AddressCity-Hunter	cm/cm_edt_cm_mstr.html	City
AddressCountry	cm/cm_edt_cm_mstr.html	Country
AddressCountry	lg/lg_edt_rolcompanyinfo.html	Country
AddressCountry	so/so_edt_admstr.html	Country
AddressCountry	cm/cm_edt_cm_mstr.html	Country
AddressCountry	so/so_edt_admstr.html	Country
AddressFormat	cm/cm_edt_cm_mstr.html	Format
AddressFormat	so/so_edt_admstr.html	Format
AddressState	cm/cm_edt_cm_mstr.html	State
AddressState	lg/lg_edt_rolcompanyinfo.html	State
AddressState	so/so_edt_admstr.html	State
all-users	email-maintenance	UserID
all-users	user-ext-maintenance	UserID

Related QAD CSS functions:

See page 127.

- Browse Maintenance

Customer Master Report

Use Customer Master Report to generate a list of QAD CSS customers and view detailed customer information.

Clicking the Customer Master Report menu option displays the screen in Figure 6.33.

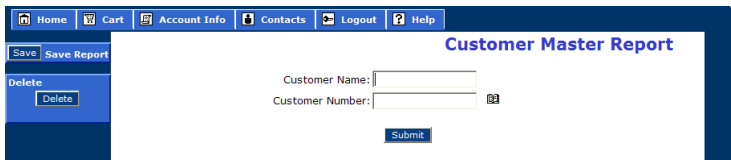


Fig. 6.33
Customer Master
Report Request
Screen

The Customer Master Report request screen lets users generate a list of customer information using customer name and customer number searches. Search results will only show customers matching the search criteria.

- 1 Enter a valid customer name for this report. Leave blank to search for all customers.
- 2 Enter a valid customer number for this report.
- 3 Click Submit to generate the report.

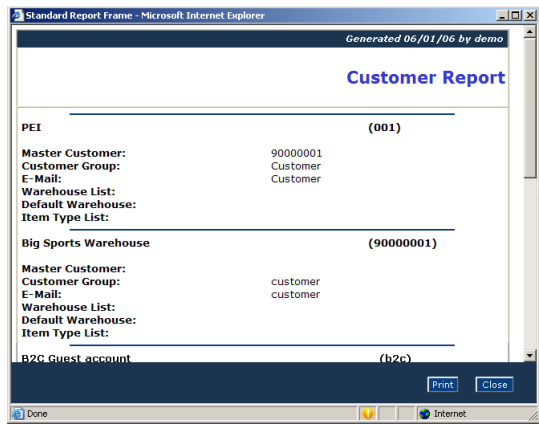


Fig. 6.34
Customer Report

Related QAD CSS functions:

- Customer Maintenance

See page 47.

Data Translation Report

Use Data Translation Report to view the language code or codes assigned to data translation fields in specified QAD CSS database tables.

Clicking the Data Translation Report menu option displays the screen in Figure 6.35.

Fig. 6.35
Data Translation
Report Request
Screen

Home Cart Account Info Contacts Logout Help

Save Save Report Delete

Language Code: All Table Name: wpro_browse_mstr

Submit

The Data Translation Report request screen lets users generate a list of fields available for translation using language code and table name searches. Search results will only show fields matching the search criteria.

- 1 Select one of the valid language codes to include in the search. Select All to search for all languages.
- 2 Select the name of a database table.
- 3 Click Submit to generate the report.

Fig. 6.36
Data Translation
Report Detail

Standard Report Frame - Microsoft Internet Explorer

Generated 06/01/06 by demo

Data Translation

Table Name	Field Name	Language	PUK
wpro_browse_mstr	browse_title.table_field_labels	esp	AddressCitycm/cm_edt_cm_mstr.htmlex 4.1
wpro_browse_mstr	browse_title.table_field_labels	esp	AddressCityso/so_edt_admstr.htmlex 4.1
wpro_browse_mstr	browse_title.table_field_labels	esp	AddressCountrycm/cm_edt_cm_mstr.htmlex 4.1
wpro_browse_mstr	browse_title.table_field_labels	esp	AddressCountrylg/ig_edt_rocompanyinfo.htmlex 4.1
wpro_browse_mstr	browse_title.table_field_labels	esp	AddressCountryso/so_edt_admstr.htmlex 4.1
wpro_browse_mstr	browse_title.table_field_labels	esp	AddressCountrycm/cm_edt_cm_mstr.htmlex 4.1
wpro_browse_mstr	browse_title.table_field_labels	esp	AddressCountryso/so_edt_admstr.htmlex 4.1
wpro_browse_mstr	browse_title.table_field_labels	esp	AddressFormatcm/cm_edt_cm_mstr.htmlex 4.1
wpro_browse_mstr	browse_title.table_field_labels	esp	AddressFormatso/so_edt_admstr.htmlex 4.1
wpro_browse_mstr	browse_title.table_field_labels	esp	AddressStatecm/cm_edt_cm_mstr.htmlex 4.1
wpro_browse_mstr	browse_title.table_field_labels	esp	AddressStatelg/ig_edt_rocompanyinfo.htmlex 4.1
wpro_browse_mstr	browse_title.table_field_labels	esp	AddressStatesso/so_edt_admstr.htmlex 4.1

Print Close

Related QAD CSS functions:

See page 174.

- Data Translation Fields

- Language Control Maintenance

See page 176.

Documentation Master Report

Use Documentation Master Report to view detailed programming information about QAD CSS modules and their associated functions.

Clicking the Documentation Master Report menu option displays the screen in Figure 6.37.

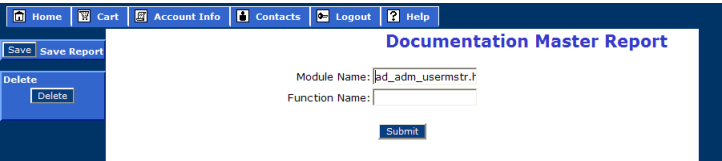


Fig. 6.37
Documentation
Master Report
Request Screen

- 1 Enter a valid QAD CSS system module name to include in the search. Leave blank to search for all modules.
- 2 Enter a valid function name corresponding to a QAD CSS module to include in the search. Leave blank to include all functions.
- 3 Click Submit to generate the report.

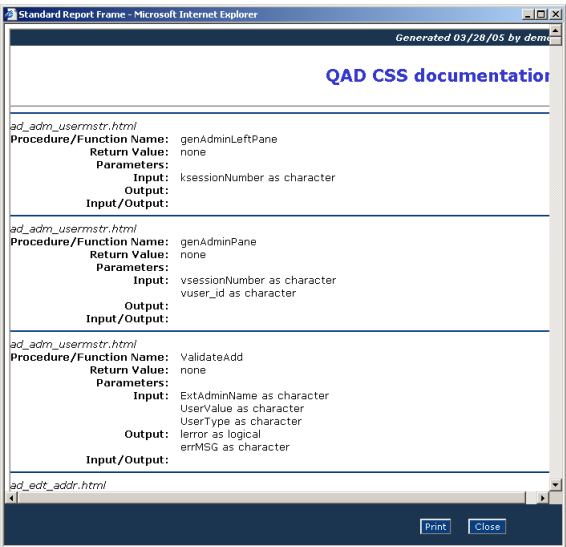


Fig. 6.38
QAD CSS
Documentation
Report

Related QAD CSS functions:

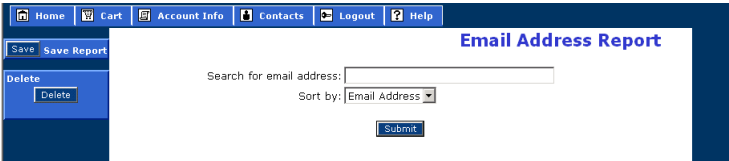
- See page 156.
- System Module Maintenance

E-Mail Address Report

Use E-Mail Address Report to generate a list of QAD CSS users and their e-mail addresses as defined in the QAD CSS user table. This report is useful to find a user name with the corresponding e-mail address.

Clicking the E-Mail Address Report menu option displays the screen in Figure 6.39.

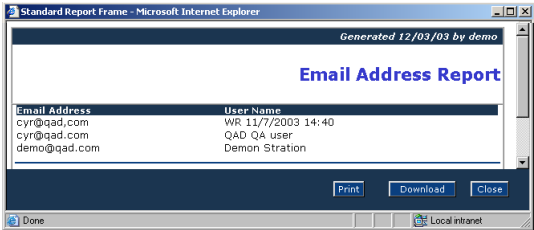
Fig. 6.39
E-Mail Address
Report Request
Screen



The E-Mail Address Report request screen lets users find e-mail listings using e-mail address searches. Search results will only show e-mail addresses matching the search criteria.

- 1 Enter part or all of the e-mail address for the report.
- 2 Select the method for sorting the data in the report.
- 3 Click Submit to generate the report according to the selection criteria.

Fig. 6.40
E-Mail Address
Report Detail



Email Address	User Name
cyr@qad.com	WR 11/7/2003 14:40
cyr@qad.com	QAD QA user
demo@qad.com	Demon Stration

Related QAD CSS functions:

- See page 66.
- User Maintenance

E-Mail Event Journal Report

Use E-Mail Event Journal Report to view e-mail notifications automatically generated when an e-mail event occurs.

Clicking the E-Mail Event Journal Report menu option displays the screen in Figure 6.41.

Fig. 6.41
E-Mail Event
Journal Report
Request Screen

- 1 Enter all or part of the date range to include in the search. Leave blank to search for all e-mail events.
- 2 Click Submit to generate the report.

The search results in a screen similar to E-Mail Event Journal Report Detail.

Date	Time	Event ID	Recipients	Subject	Attachment File Names
05/08/06	17:45:53	EX031			
Body File Name: /home/mfg/qadcss/qadcss/temp/email/NlfJhcQjaicWbLA37449.email					
05/08/06	17:46:44	EX036			
Body File Name: /home/mfg/qadcss/qadcss/temp/email/NlfJhcQjaicWbLA89066.email					
05/08/06	17:49:11	EX031			
Body File Name: /home/mfg/qadcss/qadcss/temp/email/Pikckcoahkckgbhl27955.email					
05/08/06	17:55:23	EX031			
Body File Name: /home/mfg/qadcss/qadcss/temp/email/bcaXmfjceJilIac50139.email					
05/08/06	18:01:32	EX023			
Body File Name: /home/mfg/qadcss/qadcss/temp/email/bcaXmfjceJilIac84846.email					
05/08/06	18:11:18	EX031			
Body File Name: /home/mfg/qadcss/qadcss/temp/email/fabsEkajdqkIPaL671306.email					
05/09/06	09:55:16	EX031			
Body File Name: /home/mfg/qadcss/qadcss/temp/email/jaOcccbznikoTo57309117.email					

Fig. 6.42
E-Mail Event
Journal Report
Detail

Related QAD CSS functions:

- E-Mail Master Maintenance

See page 187.

Error Message Master Report

Use Error Message Master Report to view error messages and their corresponding error actions generated by certain events in QAD CSS modules.

Clicking the Error Message Master Report menu option displays the screen in Figure 6.43.

Fig. 6.43
Error Message
Master Report
Request Screen

The screenshot shows a web application interface. At the top is a dark blue navigation bar with white text links: Home, Cart, Account Info, Contacts, Logout, and Help. Below this is a sidebar on the left with a blue background and white text links: Save, Save Report, and Delete. The main content area has a white background and a blue header bar that says 'Error Message Master Report'. Below this header bar is a search form with two input fields: 'Error Number:' and 'Module:'. The 'Module:' field is a dropdown menu. Below the input fields is a blue 'Submit' button.

The Error Message Master Report request screen lets users view system errors using error number and QAD CSS module searches. Search results only show error messages matching the search criteria.

- 1 Enter all or part of an error number to include in the search. Leave blank to search for all error messages.
- 2 Enter the name of a valid module to include in the search or select it from the drop-down list. This is a specific QAD CSS module from which errors were generated. This field is required.
- 3 Click Submit to generate the report.

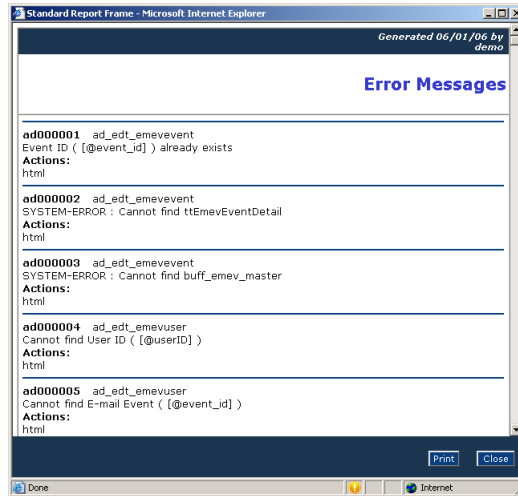


Fig. 6.44
Error Messages
Report

Related QAD CSS functions:

- Error Message Maintenance

See page 194.

Item Master Report

Use Item Master Report to view items and their corresponding prices that customers can order through the QAD CSS Web order-entry system.

Clicking the Item Master Report menu option displays the screen in Figure 6.45.

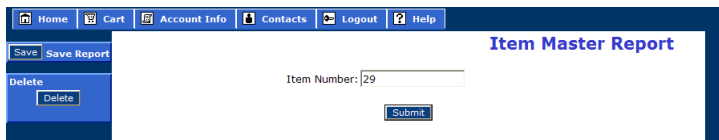
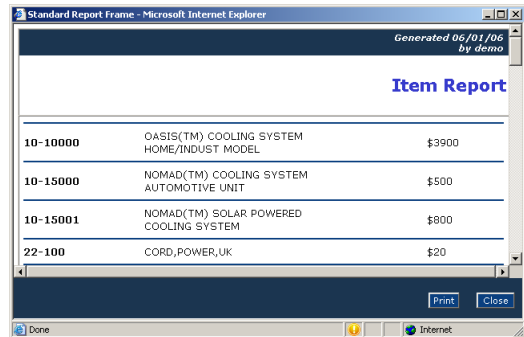


Fig. 6.45
Item Master Report
Request Screen

The Item Master Report request screen lets users find items using item number searches. Search results will only show items matching the search criteria.

- 1 Enter all or part of a valid item number to include in the search. Leave blank to search for all items.
- 2 Click Submit to generate the report.

Fig. 6.46
Item Report



Item Report		
10-10000	OASIS(TM) COOLING SYSTEM HOME/INDUST MODEL	\$3900
10-15000	NOMAD(TM) COOLING SYSTEM AUTOMOTIVE UNIT	\$500
10-15001	NOMAD(TM) SOLAR POWERED COOLING SYSTEM	\$800
22-100	CORD,POWER,UK	\$20

Related QAD CSS functions:

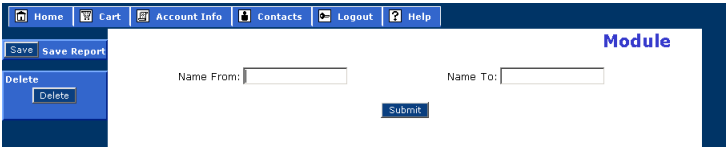
- See page 51.
- See page 87.
- Customer Item Maintenance
- Item Types Maintenance

Module Report

Use Module Report to view the configuration settings of QAD CSS modules.

Clicking the Module Report menu option displays the screen in Figure 6.47.

Fig. 6.47
Module Report
Request Screen



Module

Name From: Name To:

Submit

The Module Report request screen lets users find module configuration settings using a module name search. Search results will only show modules matching the search criteria.

- 1 Enter all or part of a module name range to include in the search. Leave blank to search for all QAD CSS modules.
- 2 Click Submit to generate the report.

Standard Report Frame - Microsoft Internet Explorer

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Module

Module Name	Module Label	Https Secure	Login Req'd	Menu	Access Req'd
ad/ad_mnt_itemlayout.html		no		no	no
ad/ad_adm_bccuserpersonal.html	Personal Admin	no	*	yes	no
ad/ad_adm_usermstr.html	User Maintenance	no	*	no	yes
ad/ad_edt_addr.html	Edit Address	no	*	no	yes
ad/ad_edt_b2cuser.html	Edit B2C	no		no	yes
ad/ad_edt_browsestr.html	Browse Master Maint	no	*	no	yes
ad/ad_edt_carrierhref.html	Edit Carrier href	no	*	no	yes
ad/ad_edt_contact.html	Contact Maintenance	no	*	no	yes
ad/ad_edt_contact:ref.html	Contact Cross-Reference Maintenance	no	*	no	yes
ad/ad_edt_currencycode.html	Currency Unicode Detail	no	*	no	yes
ad/ad_edt_customer.html	Edit Customer	no	*	no	yes
ad/ad_edt_customeritem.html	Customer Item	no	*	no	yes

Print Close

Fig. 6.48
Module Details

Related QAD CSS functions:

- System Module Maintenance See page 156.
- Menu Maintenance See page 97.

System Module Report

Use System Module Report to view JavaScript documents associated with QAD CSS modules.

Clicking the System Module Report menu option displays the screen in Figure 6.49.

Home Cart Account Info Contacts Logout Help

Save Save Report

Delete Delete

System Module Report

Name: ad/ad_mnt

Script:

Show JavaScripts: ☐

Submit

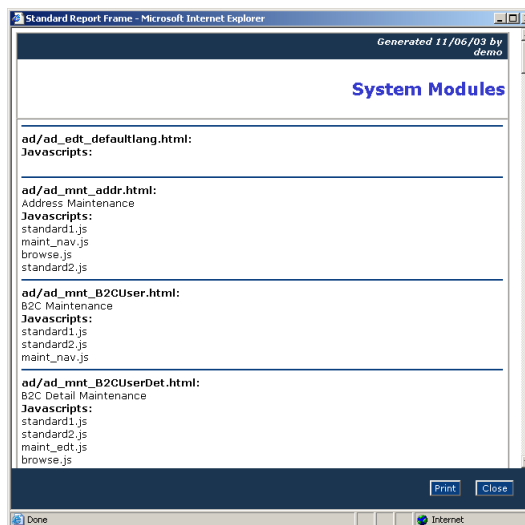
Fig. 6.49
System Module
Report Request
Screen

- 1 Enter a valid QAD CSS module name to include in the search. Leave blank to search for all modules.
- 2 Enter the name of a valid JavaScript file to include in the search. Leave blank to include all JavaScripts.

- 3 Indicate whether you want to show all JavaScripts related to the module.
- 4 Click Submit to generate the report.

When JavaScript details are included, the search results in a screen similar to Figure 6.50.

Fig. 6.50
System Modules
Report



Related QAD CSS functions:

- ▶ See page 156.
 - System Module Maintenance
- ▶ See page 162.
 - JavaScript Maintenance

System Registry Report

Use System Registry Report to generate a list of QAD CSS keys defined in the system registry and their corresponding values.

Clicking the System Registry Report menu option displays the screen in Figure 6.51.



Fig. 6.51
System Registry
Report Request
Screen

The System Registry Report request screen lets users find keys using a key name search. Search results will only show keys matching the search criteria.

- 1 Enter all or part of a valid QAD CSS registry key to include in the search. Leave blank to search for all registry keys.
- 2 Click Submit to generate the report.

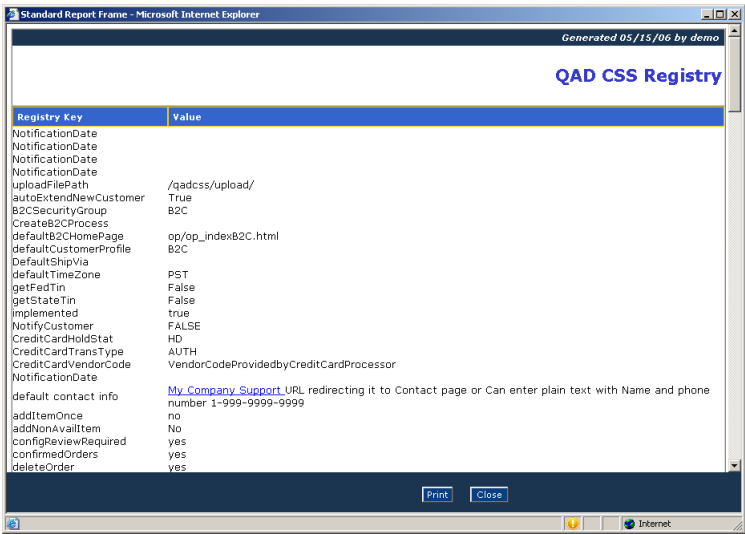


Fig. 6.52
QAD CSS Registry
Report

Related QAD CSS functions:

- System Registry Maintenance

See page 117.

Security Group Report

Use Security Group Report to view security groups set up in QAD CSS.

Clicking the Security Group Report menu option displays the screen in Figure 6.53.

Fig. 6.53

Security Group
Report Request
Screen

- 1 Enter all or part of a security group range to include in the search. Leave blank to search for all security groups.
- 2 Click Submit to generate the report.

Fig. 6.54

Security Groups
Report

Related QAD CSS functions:

See page 58.

- Security Group Maintenance

Super Layer Report

Use Super Layer Report to view super layer module associations defined in QAD CSS and the loading information defined for the super layers.

Clicking the Super Layer Report menu option displays the screen in Figure 6.55.

Fig. 6.55
Super Layer Report
Request Screen

- 1 Enter a valid QAD CSS program name to include in the search. Leave blank to search for all programs.
- 2 Enter the name of a valid QAD CSS module to include in the search. Leave blank to include all modules.
- 3 Enter the name of a valid layer to include in the search. Leave blank to search for all layers.

The layer corresponding to the placement of the program:

- Extended
- User Interface
- Adapter

- 4 Click Submit to generate the report.

Name	Seq	Layer	Module	Load On Start?
lib/lib_adm_superev1.p	35	extended	adm	yes
lib/lib_adm_superev2.p	40	extended	adm	yes
lib/lib_adr_superev1.p	45	extended	adm	yes
lib/lib_adm_supervi1.p	35	ui	adm	yes
lib/lib_adm_supervi2.p	40	ui	adm	yes

Fig. 6.56
Super Layer Report
Details

Related QAD CSS functions:

- Super Layer Maintenance

See page 148.

Transaction History Report

The Transaction History Report lets administrators display and review all Web site transactions. The activities for each visitor can be logged and reviewed.

As users navigate through the site, QAD CSS captures session information such as:

- The pages visited
- The duration of the visit on each page
- Page/form information
- HTML information passed from page to page

This report also lets administrators purge selected transactions from the transaction table to manage table and database size. The data for this report comes from the QAD CSS Transaction table.

See page 152.

Transaction logging is controlled from the System Control Maintenance screen.

Important Transaction logging creates a large volume of records in the Transaction table. This consumes disk resources if not maintained. Make sure to periodically purge old transaction entries by deleting records from the Transaction table when running this function.

Clicking the Transaction Report menu option displays the screen in Figure 6.57.

Fig. 6.57
Transaction History
Report Request
Screen

The Transaction History Report request screen lets users find orders using transaction date, user ID, customer ID, and session ID searches. Search results will only show the orders matching the search criteria.

- 1 Enter a valid date range or use the calendar browse to find a date range.
- 2 Enter a valid user ID to limit the report to transactions for that user only.
- 3 Enter a valid customer number to limit the report to transactions for that customer only.
- 4 Indicate whether to show session information for the transactions. Select the Show Session Record option when you want to display the values stored in the session record at the time the page was requested.
- 5 Indicate whether to show session variable information of the transactions. Select the Show Session Variable option when you want to display the values of all the HTML form fields.
- 6 Indicate whether to delete the transactions no longer needed. Select the Delete Transactions Found option when you want to delete the transactions shown on the report.

Important When selection criteria are not specified, all transactions will be deleted when this option is selected.

- 7 Select the Sort By method for the report.
- 8 Click Submit to generate the report according to the selection criteria.

Fig. 6.58
Transactions
Report

Trans Id	Date	User	Cust No	Page
2	05/08/06	User		lg/lg_login.html
Session ID: bpkjzhfindscjljl				
3	05/08/06	User		lg/lg_login.html
Session ID: hbkklkcRaxfGlyk				
4	05/08/06	User		lg/lg_login.html
Session ID: dwliWvslidinalbiM				
5	05/08/06	User		lg/lg_login.html
Session ID: pTvKYBgIbwUJavQW				
6	05/08/06	User		lg/lg_login.html
Session ID: XmldaaatxUSJUill				
7	05/08/06	User		lg/lg_login.html
Session ID: lltanahYicctmi				

Report Links

The Transaction report provides a transaction number link to view complete details about the transaction. Clicking on this link will show the session record and session variables. This is useful when the report is run without details.

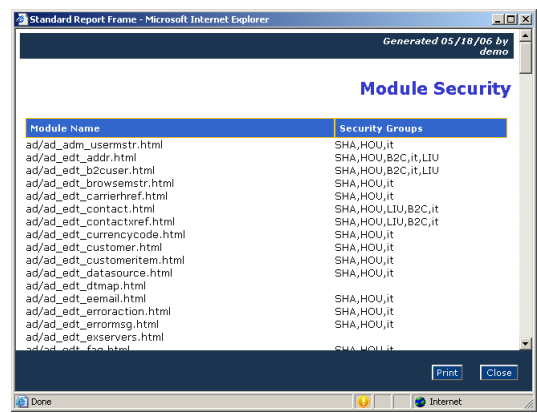
Module Security Report

Use Module Security Report to view security groups associated with QAD CSS modules.

Clicking the Module Security Report menu option displays the screen in Figure 6.59.

Fig. 6.59
Module Security
Report Request
Screen

- 1 Enter the range of module names to include in the report. Leave blank to include all modules defined in the system.
- 2 Click Submit to generate the report.



Module Name	Security Groups
ad/ad_adm_usermstr.html	SHA,HOU,it
ad/ad_edt_addr.html	SHA,HOU,B2C,it,LIU
ad/ad_edt_b2cuser.html	SHA,HOU,B2C,it,LIU
ad/ad_edt_browsestr.html	SHA,HOU,it
ad/ad_edt_carrhref.html	SHA,HOU,it
ad/ad_edt_contact.html	SHA,HOU,LIU,B2C,it
ad/ad_edt_contactxref.html	SHA,HOU,LIU,B2C,it
ad/ad_edt_currencycode.html	SHA,HOU,it
ad/ad_edt_customer.html	SHA,HOU,it
ad/ad_edt_customeritem.html	SHA,HOU,it
ad/ad_edt_datasource.html	SHA,HOU,it
ad/ad_edt_dmap.html	SHA,HOU,it
ad/ad_edt_email.html	SHA,HOU,it
ad/ad_edt_erroraction.html	SHA,HOU,it
ad/ad_edt_errormsg.html	SHA,HOU,it
ad/ad_edt_exservers.html	SHA,HOU,it
ad/ad_edt_fax.html	SHA,HOU,it

Fig. 6.60
Module Security

Related QAD CSS functions:

- System Module Maintenance

See page 156.

User Master Report

User Master Report lets administrators generate a list of QAD CSS users and, optionally, customers and their e-mail addresses. This report is useful for finding a user or customer name with the corresponding e-mail address.

Clicking the User Master Report menu option displays the screen in Figure 6.61.



Fig. 6.61
User Master Report
Request Screen

- 1 Enter a valid user ID to include in the search. Leave blank to search for all users.
- 2 Select how the data in the report will be sorted.
- 3 Indicate whether to include customers in the search.
- 4 Click Submit to generate the report.

Fig. 6.62
User Report

Generated 12/01/03 by demo		
User Report		
demo	Demon Stration	demo@qad.com
QAD01	QAD QA user	cyr@qad.com
WR71440	WR 11/7/2003 14:40	cyr@qad.com

This report was generated by QAD CSS.
© 1986-2003 QAD Inc.,

Related QAD CSS functions:

- ▶ See page 66.
 - User Maintenance
- ▶ See page 47.
 - Customer Maintenance

Module Hierarchy Report

Use Module Hierarchy Report to view QAD CSS module hierarchy. This information is initially loaded with the system data.

Clicking the Module Hierarchy Report menu option displays the screen in Figure 6.63.

Fig. 6.63
Module Hierarchy
Report Request
Screen

- 1 Enter the range of module names to include in the report. Leave blank to include all modules defined in the system.
- 2 Click Submit to generate the report.

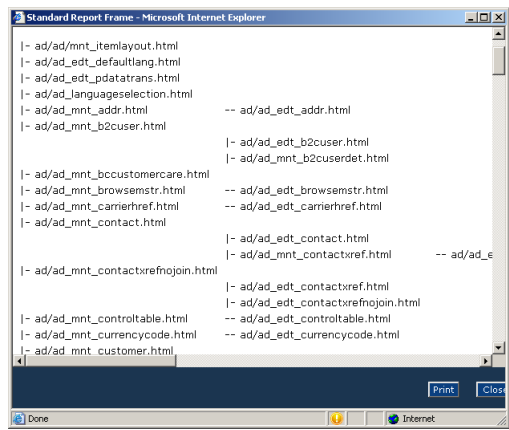


Fig. 6.64
Module Hierarchy
Report

Related QAD CSS functions:

- System Module Maintenance

See page 156.

Credit Card Transaction Report

Use Credit Card Transaction Report to view credit card transaction information.

Note To use this report, you must select the Transaction Log will be kept option in Credit Card Vendor Maintenance.

Clicking the Credit Card Transaction Report menu option displays the screen in Figure 6.65.

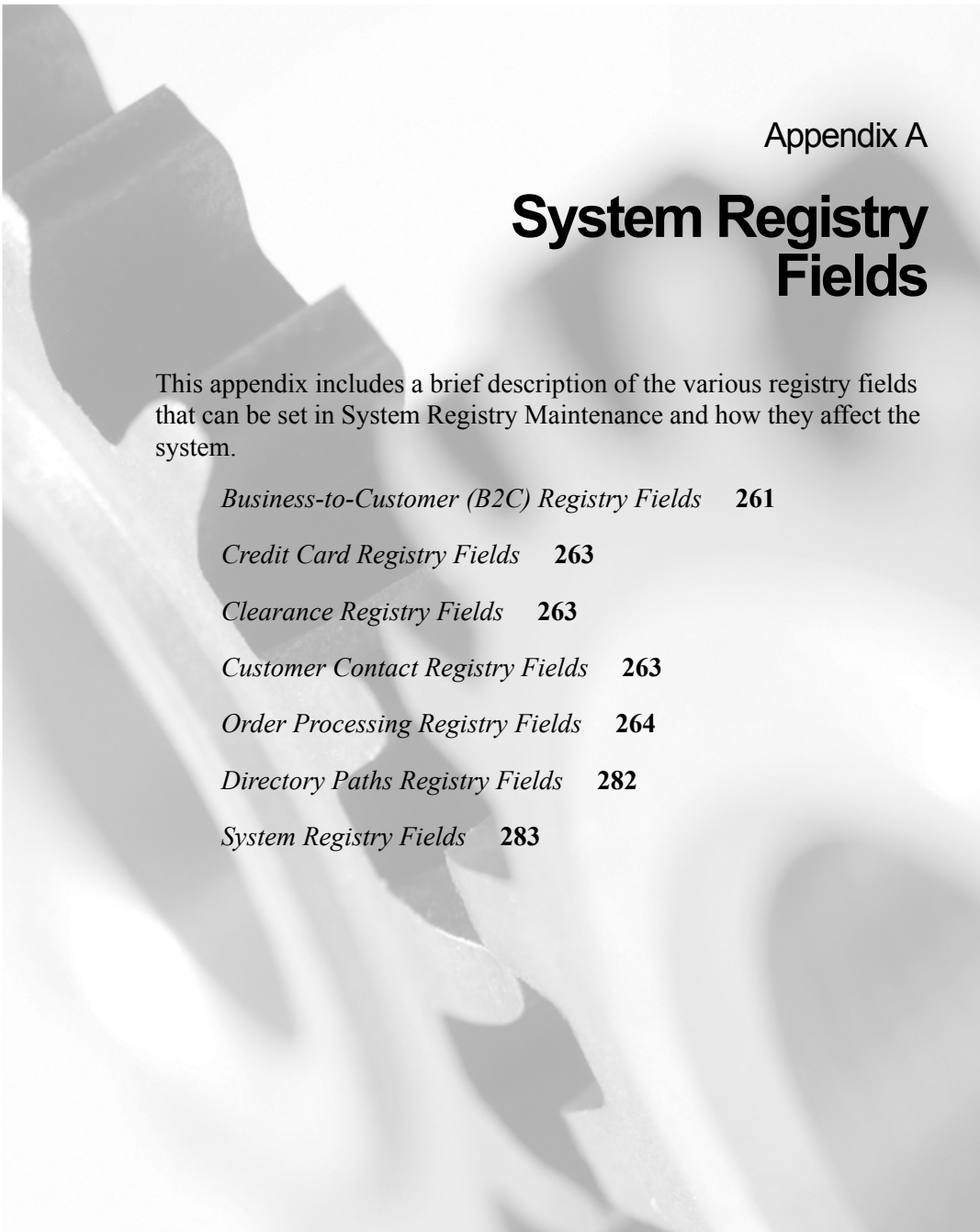
Fig. 6.65
Credit Card
Transaction Report
Request Screen

- 1 Enter all or part of the transaction date range for the report.
- 2 Enter the customer ID range for the report.
- 3 Enter the sales order number range for the report.

- 4 Enter the user ID range for the report.
- 5 Indicate whether to include credit card details in the report.
- 6 Indicate whether to only include failed credit card transactions in the report.
- 7 Select the method for sorting the data in the report.
- 8 Click Submit to generate the report.

Fig. 6.66
Credit Card
Transaction Report

Credit Card Transaction Report		
Order Number:	SO10050	User ID: demo
Order Date:	12/07/05	
Order Amount:	\$ 475.25 USD	
Customer Number:	90000001	
Transaction Status:		
Transaction Number:	2	
Credit Card Number:		
Credit Card Name:		
Credit Card Type:		
Credit Card Expires:	?	
Authorization Number:	?	
Authorization Date:	?	
Authorization Amount:	\$ 0.00 USD	
Order Number:	SO10051	User ID: demo
Order Date:	12/07/05	
Order Amount:	\$ 698.25 USD	
Customer Number:	90000001	
Transaction Status:		
Transaction Number:	3	
Credit Card Number:		
Credit Card Name:		
Credit Card Type:		
Credit Card Expires:	?	
Authorization Number:	?	
Authorization Date:	?	
Authorization Amount:	\$ 0.00 USD	



Appendix A

System Registry Fields

This appendix includes a brief description of the various registry fields that can be set in System Registry Maintenance and how they affect the system.

Business-to-Customer (B2C) Registry Fields **261**

Credit Card Registry Fields **263**

Clearance Registry Fields **263**

Customer Contact Registry Fields **263**

Order Processing Registry Fields **264**

Directory Paths Registry Fields **282**

System Registry Fields **283**

Registry Settings

Much of the way buyers interact with QAD CSS is managed through registry settings defined in System Registry Maintenance.

The tables in this appendix list the various registry fields and associated information. Field information is organized based on the area (module) within QAD CSS that the field affects. These areas are:

- B2C, Business-to-Customer
- CC, Credit Card
- Customer Contacts
- Clearance, License Registration
- OP, Order Processing
- Paths, Directory settings
- Sys, General system settings

Each table displays the following data:

Key: This is the name of the registry field.

Default: This is the default value supplied at installation. Some defaults are blank. Each installation can modify defaults as needed.

Override: This is the default setting of the Override field associated with the registry field. When Override is Yes, the system will continue to look for other instances of this field value that are set up for various groups such as marketing groups or security groups.

Usage: This is a brief description of how the field affects the operation of the system. In some cases, fields may apply differently in a B2C or B2B implementation.

The following conventions are used when specifying registry values:

- Use the caret (^) symbol to separate multiple items that apply to one field (see “orderHeaderInfoLayout” on page 268).
- Use the pipe symbol (|) to separate a code from its value (see “paymentOptions” on page 269).

Table 6.1 Business-to-Customer (B2C) Registry Fields (Page 1 of 2)

Key	Default	Over	Usage
autoExtendNewCustomer	False	No	This setting determines when the customer account is created in MFG/PRO. True: A customer record is created in MFG/PRO when the order is submitted. False: At order submission, temporary records are created in QAD CSS. These can be reviewed by an administrator who then submits them to MFG/PRO. Set this field to False during initial implementation to monitor orders and customers before they are created in MFG/PRO.
B2CSecurityGroup	B2C	No	This setting defines the default security group for B2C users. You create this group during implementation and associate it menus and menu buttons do determine which areas of your site B2C users can access. By default, this is set to B2C.
createB2CProcess		No	This setting determines when the customer account is created in MFG/PRO. Auto: A customer record is created in MFG/PRO when the order is submitted. Blank: At order submission, temporary records are created in QAD CSS. These can be reviewed by an administrator who then submits them to MFG/PRO. This setting is referenced in the <code>lg/lg_newloginstart.html</code> page, which is an alternate way for letting B2C users register.
defaultCustomerProfile	B2C	No	This setting determines the MFG/PRO customer that B2C shoppers are associated with before they have logged in or registered. This customer is used for creating sales quotes during the order-entry process to establish pricing and taxes. You create this customer record in MFG/PRO during implementation and then associate it with a default B2C user account in QAD CSS. Values associated with the QAD CSS user associated with the MFG/PRO B2C customer specified as <i>defaultCustomerProfile</i> also supply values for fields such as marketing group when a new user record is created during registration.

Table 6.1 Business-to-Customer (B2C) Registry Fields (Page 2 of 2)

Key	Default	Over	Usage
defaultB2CHomePage	../op/op_index B2C.html	No	The default B2C user's home page. B2C users are not typically required to log in like B2B users, since they do not necessarily have a defined user account. You can use this field to redirect B2C users to another type of start page.
defaultShipVia		No	This setting determines the ship via code associated with new customer records (cm_shipvia) created in MFG/PRO as part of extending customers in a B2C scenario. Make sure that this value is defined in Generalized Codes Maintenance (36.2.13) in MFG/PRO to avoid validation errors in Customer Maintenance (2.1.1).
defaultTimeZone	PST	No	This setting defines the default time zone code associated with temporary address records created in QAD CSS.
getFedTin	False	No	This setting is used when creating temporary addresses during the order quote process to indicate that the state taxpayer identification number should be used. Set this to True when MFG/PRO tax calculations are performed through the Sales and Use Tax Interface to Vertex's Quantum system.
getStateTin	False	No	This setting is used when creating temporary addresses during the order quote process to indicate that the state taxpayer identification number should be used. Set this to True when MFG/PRO tax calculations are performed through the Sales and Use Tax Interface to Vertex's Quantum system.
implemented	True	No	Indicates that the B2C module is active.
notifyCustomer	False	No	This setting controls the display of a check box asking B2C shoppers if they would like to receive information about updates and specials. Currently, no functionality is associated with this field, but it could be added with custom programming.

Table 6.2 Credit Card Registry Fields

Key	Default	Over	Usage
confirmedOrders	Yes	No	This setting determines if orders are entered as confirmed.
creditCardHoldStat	HD	No	Specify the two-character hold code status indicating that an order is on hold because the customer has exceeded their credit limit. If this registry setting is not defined, CC is used by default. When an order is on credit hold, QAD CSS sets the hold status in the order header to this value. When the order is created in MFG/PRO, the MFG/PRO default hold status is used. In MFG/PRO, any non-blank value in the Action Status field indicates that the order is on credit hold
creditCardVendorCode	VendorCodeProvidedByCreditCardProcessor	No	This setting determines which record created in Credit Card Vendor Maintenance that the system should use when implementing the API for creating credit card transactions. Since you can set up more than one record in this maintenance program, the system uses the registry setting to determine which record is active. This field is used only when credit cards are implemented. Its value depends on the way your company is identified with your credit card service provider.

Table 6.3 Clearance Registry Fields

Key	Default	Over	Usage
notificationDate		No	Stores the date that the site was cleared. Not currently implemented.

Table 6.4 Customer Contact Registry Fields

Key	Default	Over	Usage
default Contact Info	 My Company Support URL redirecting it to Contact page or Can enter plain text with Name and phone number 1-999-9999-9999	No	This field stores the default contact information displayed when a buyer clicks the Contact Us button.

Table 6.5 Order Processing Registry Fields (Page 1 of 19)

Key	Default	Over	Usage
addItemOnce	No	No	This setting determines if buyers can add the same item number only once to their cart. Setting this to No minimizes errors and is recommended unless there is a good business reason to prevent the addition of the same item more than once.
addNonAvailItem	No	No	This setting determines whether buyers can add items to the cart that are not defined in QAD CSS (wpro_cust_item table). This setting affects heads-down order entry and the Express Order cart. Setting this field to Yes is a way of letting users order memo items. However, this can create problems later in order processing. To implement a complete process that supports memo items may require additional customizations. If you set this field to Yes, you should set deleteUnavailableItem to No.
deleteUnavailableItem	Yes	No	This setting is currently not implemented. This setting determines whether items that do not exist in QAD CSS are deleted from the shopping cart. This setting is required in addition to addNonAvailItem to manage memo items since QAD CSS lets items be added to a cart indirectly such as through copying an old order or using an order template. When this field is Yes, any items that do not exist are immediately removed from the cart.
configReviewRequired	Yes	No	This setting determines how customers interact with the system when they place configured items in their carts. When this is Yes, an icon displays next to a configured item when it is put in the cart. Buyers can click on the icon to validate the features and options. They then click Update Shopping Cart when they are satisfied with the configuration.

Table 6.5 Order Processing Registry Fields (Page 2 of 19)

Key	Default	Over	Usage
deleteOrder	Yes	No	This setting determines whether submitted orders are deleted by the system. In normal order processing, an order is submitted by the buyer. The system validates the order and creates a file that is used to update MFG/PRO. When the order is successfully saved in MFG/PRO, the status of the order is changed to submitted. If Archive Orders is Yes in Order Control Maintenance, the order is copied to the archive table and then deleted from QAD CSS. Otherwise, it is deleted without archiving. You can use this registry setting to prevent the system from deleting submitted orders for a particular user. This might be needed to troubleshoot a problem a user is having.
finditOE	OE2	No	This setting determines which page displays when the buyer searches from the main QAD CSS home page. OE1: The system loads <code>op/op_item_lookup.html</code>. OE2: The system loads <code>op/op_index.html</code>.
getPriceOfConfigParts	Yes	No	This setting determines if the price of configured items is calculated and displayed in the catalog.
getPriceOfConfigPartsInCart	Yes	No	This setting determines if the price of configured items is calculated and displayed in the shopping cart.
getPriceOnAdd	Yes	No	Not currently implemented. Instructs the system to recalculate the price of an item when it is added to the cart.
hideOrderEntry	No	No	When Yes, order entry does not display on the menu for customers on credit hold.

Table 6.5 Order Processing Registry Fields (Page 3 of 19)

Key	Default	Over	Usage
indexOrderHome	CAT2	No	This setting determines what displays on the main OE2 page. CAT1 and CAT2 determine the level of catalog entries that display in the left pane; these settings are mutually exclusive. MESSAGE, STATUS, and MOTD affect the content of the center pane. These can be used in any combination and determine the order in which the content displays. • CAT1 displays all distinct product categories in the product catalog. • CAT2 display only category 2 level items in the product catalog. • MESSAGE displays any messages created for the logged-in user in User Message Maintenance. • STATUS displays orders previously placed by the buyer and the order status. indexOrderStatusHistory determines how many days of history display. • MOTD displays either any messages of the day defined in Message Maintenance for the current date or a message defined for a marketing group associated with the current user's customer.
itemDetailPgm	../op/op_itemdetail.html	No	This setting specifies the program to run when a buyer clicks a detail hyperlink in the catalog. • Specify ../op/op_itemimage.html for pop-up (the default). • Specify ../op/op_itemdetail.html for a new HTML page.
itemDetailStyle	inline	No	This setting specifies how the detail page is displayed when a buyer clicks a hyperlink to display detailed information in the catalog. Specify one of the following: • Inline displays a new HTML page. • Popup displays a smaller window.
itemQuantityFormat	>>>>>9.99	No	This setting determines the format and length of the Item Quantity field that display in the three order entry pages and the shopping cart (getCurItems, Item_detail, bclItem_confirm, and bchdo_entry).

Table 6.5 Order Processing Registry Fields (Page 4 of 19)

Key	Default	Over	Usage
itemQuantityShow	8	No	This setting determines how many digits are shown in the Quantity field for OE1, OE2, and HDO.
itemTable.char1	No	No	Not currently used.
itemTypesLabel0-eng	Top Categories	No	This setting determines the label1 in the OE1 index page when the language is English. This and the following related label let implementers adopt the specific terminology required at each site. If you are implementing multiple languages, you must create a corresponding registry entry for that language. For example, if you implement French (frf), create itemTypesLabel0-frf.
itemTypesLabel1-eng	Subcategory 1	No	This setting determines label 2 in the OE1 index page when the language is English.
itemTypesLabel2-eng	Subcategory 2	No	This setting determines label 3 in the OE1 index page when the language is English.
itemTypesLabel3-eng	Subcategory 3	No	This setting determines label 4 in the OE1 index page when the language is English.
itemTypesLabel4-eng	Subcategory 4	No	This setting determines label 5 in the OE1 index page when the language is English.
ItemTypesTopLabel	Products	No	This setting is not currently used. It has been replaced by the language-specific version.
itemTypesTopLabel-eng	Products	No	This setting determines the title in the OE1 index page for the top label of item categories when the language is English.
maxOrderLines	0	No	This setting determines the maximum number of lines users can add to the shopping cart. Set this to 0 if the number of lines is unlimited.

Table 6.5 Order Processing Registry Fields (Page 5 of 19)

Key	Default	Over	Usage
OEHome	op/op_itemlookup.html	No	This setting determine which order-entry page to display when the order-entry process is complete or when an order-entry page has not been found some other way. By default, this is OE1. The default is OE1. During user log-in, QAD CSS determines this value and adds it to the user's session variables. If the user chooses a different order entry, the session variable is updated and the updated value then applies to the session. The registry value determines the initial default only. A default may be needed when a buyer requests an order-entry page indirectly. For example, the buyer could access the reports menu, copy an order (see reportOrderCopy), view the cart, and then click Continue Shopping. The system then needs to know which order-entry page to display.
orderHeadCommit		No	This setting determines the type value of comments associated with the order header. You can leave this blank or specify a type that identifies the comments as being from QAD CSS. Comment types can be validated using generalized codes in MFG/PRO, so if you specify a type, make sure it will pass validation.
orderLineCommit		No	This setting determines the type value of comments associated with the order lines. See description of orderHeadCommit.
orderHeaderInfoLayout	3,user_id ^request_date ^due_date ^po ^payment_method ^currency ^shipping_method ^order_comments	No	This setting determines the values that display on the order confirmation page. The first number is the number of rows or columns to display, followed by the fields to display. The confirmation page displays after the buyer commits an order and can be printed if needed. In addition to the fields included as defaults, erp_order_number can be used.

Table 6.5 Order Processing Registry Fields (Page 6 of 19)

Key	Default	Over	Usage
orderHeaderInfoLayoutLabels	Placed By^Request Date^Due Date^PO Number^Payment Method^Currency^Shipping Method^Header Comments	Yes	This setting determines the labels for the fields displayed on the order confirmation page, as determined by orderHeaderInfoLayout. Specify the same number of labels to correspond to the fields.
orderUIMode	Yes	No	This setting determines if an intermediate page displays during checkout before the order confirmation page. The intermediate page displays a message that the system is processing the order. Set this to Yes if the number of items in the cart is typically large or preparing for confirmation takes a long time. This prevents the buyer from thinking that nothing is happening.
orderWhereAmIGoing	../op/op_bcorderconfirm2.html	No	This is normally set to ../op/op_bcorderconfirm2.html. You can change this to call a different page if you have created a custom page to display before order confirmation.
paymentOptions		No	Specify the default payment option. Two options are currently supported: • Credit Card (1) • Purchase Order (2) Other options can be used, but you must modify the code to change processing based on the option selected. If left blank, Credit Card and Purchase Order are default payment options.
QADUDomain		No	Specify the domain that QAD CSS should use to log in to MFG/PRO. This field is used with QADUser. A valid user record with access to this domain must be defined in MFG/PRO User Maintenance (36.3.18 in MFG/PRO eB2; 36.3.1 in MFG/PRO eB2.1).

Table 6.5 Order Processing Registry Fields (Page 7 of 19)

Key	Default	Over	Usage
QADUPasswd		No	Specify the password that QAD CSS should use to log in to MFG/PRO. This field is used with QADUser. A valid user record with this password must be defined in MFG/PRO. If you are using password expiration dates as part of your MFG/PRO security setup, you must ensure that the system administrator changes the password for this user before the password expires and then updates the <i>QADUPasswd</i> setting appropriately. Otherwise, QAD CSS does not start up or integrate correctly with MFG/PRO.
QADUser	mfg	No	Specify the ID of the user that QAD CSS should use to log in to MFG/PRO. This user must be defined in MFG/PRO.
QCartDescTruncate	12	No	This setting controls how many characters of the item description to display in the Express Order cart. The Express Order cart displays on the right pane with a description and quantity. Since this pane is typically narrow, you can control the number of characters to display with this field.
quoteOrder	True	Yes	This setting determines if a summary of the order total is displayed before the order is submitted. This is done by creating a sales quote in MFG/PRO and calculating taxes and freight. This information is then returned to QAD CSS and the sales quote is deleted. When the payment type is credit card, the order is always quoted, regardless of this value. This field is typically set to True in a B2C environment, but also might be set to True in a B2B environment depending on the business requirements.

Table 6.5 Order Processing Registry Fields (Page 8 of 19)

Key	Default	Over	Usage
reportOrderCopy	Yes	No	This setting determines if a buyer can copy an order to create a new order. When Yes, a Copy Order link displays in the Order Summary Report generated from the Account Information menu. This lets the buyer take an existing order and copy it into the shopping cart. This feature is typically used in a B2B environment. Reporting is optional in a B2C environment so if you plan to use this feature, you must set up reporting.
runGetAllWhseQty	Yes	No	This setting determines if QAD CSS gets information about the on-hand inventory quantity from MFG/PRO or from QAD CSS to display with other item details. Note: The system looks at this setting only when runGetWhseQty is set to Qty or Text. When No, the value of totQty specified in QAD CSS Customer Item Maintenance displays in the product catalog. When Yes, inventory quantity is calculated based on the setting of three fields in Sales Order Control (7.1.24): • Qty All Reduce Qty Available (soc_all). When Yes, quantity allocated is subtracted from quantity available. When No, quantity available includes all available inventory, regardless of whether it has been allocated. This field is set to Yes if calculation method 1 or 2 is selected in Sales Order Control. • Required Qty Reduce Qty Avail (soc_req). When Yes, quantity required is subtracted from quantity available. When No, quantity available includes all available inventory, regardless of whether it has been required. This field is set to Yes if calculation method 3 or 4 is selected in Sales Order Control. • Qty Avail Include Qty on Order (soc_on_ord). When Yes, quantity on open purchase or work orders is added to quantity available. When No, quantity available includes only available quantity on hand. This field is set to Yes if calculation method 2 or 4 is selected in Sales Order Control.

Table 6.5 Order Processing Registry Fields (Page 9 of 19)

Key	Default	Over	Usage
runGetBestPrice	Yes	No	This setting determines if QAD CSS runs the best pricing logic in MFG/PRO to obtain the price for an item when it is displayed in the product catalog. Items in the shopping cart are priced using best pricing regardless of the setting of this field. Use this setting to optimize performance. If the price is not being displayed in the catalog, setting this field to No prevents the unnecessary processing.
runGetBestPriceConfigParts	Yes	No	This setting determines if QAD CSS runs the best pricing logic in MFG/PRO to obtain the price for a configured item when it is displayed in the product catalog. Items in the shopping cart are priced using best pricing regardless of the setting of this field. Use this setting to optimize performance. If the price is not being displayed in the catalog, setting this field to No prevents unnecessary processing.
runGetDefWhseQty	Yes	No	This setting determines if QAD CSS gets information about the on-hand inventory quantity for the default site from MFG/PRO or from QAD CSS to display with other item details. Note: The system looks at this setting only when runGetWhseQty is set to Qty or Text. The default site is determined in this order: • A site associated with the customer record in QAD CSS • The site defined in QAD CSS Order Control • The site from cm_mstr record in MFG/PRO • The site associated with the item in Item Master Maintenance (1.4.1) When this field is Yes, the calculation is similar to that described for runGetAllWhseQty, but only items in the default site are considered. When No, the value of whsQty stored in the QAD CSS Customer Item Master (wpro_cust_item) displays.

Table 6.5 Order Processing Registry Fields (Page 10 of 19)

Key	Default	Over	Usage
runGetMinMaxQty	No	No	This setting determines whether QAD CSS enforces the minimum and maximum order quantity defined in Customer Item Maintenance.
runGetWhseQty	Off	No	The setting of runGetWhseQty has three possible values. Off: Do not perform any availability calculation. If the quantity available has been marked to display in Item Layout Maintenance, no value displays on the screen. Qty: Check the value of the runGetAllWhseQty and runGetDefWhseQty settings and display the quantity available based on those settings. Text: Check the value of runGetAllWhseQty and runGetDefWhseQty and display the text contained in one of two configurable messages, indicating that stock is available or unavailable. • OP000244 displays when zero or less quantity is available in all sites. • OP000245 displays when a quantity greater than zero is available in all sites. Note: This setting has effect only when qtyavaildefault or qtyavail are marked to display in the product catalog in Item Layout Maintenance.
searchList	master	Yes	This setting determines how the search engine looks for items: • Master (or blank): Search for items not associated with a customer. • Customer: Search for items associated with this customer or other customers related to this customer. You should set this field based on how you have loaded information about items. Since items in MFG/PRO are not directly associated with customers, this field is typically set to Master.
searchSortName	Yes	No	Not currently implemented.

Table 6.5 Order Processing Registry Fields (Page 11 of 19)

Key	Default	Over	Usage
setReqDate	No	No	This setting determines the default value of the request date when the shopping cart displays. The options are: • Yes, and promise dates are being calculated in MFG/PRO: Order line request date defaults from the calculated order line promise (delivery) date. • Yes, and promise dates are not being calculated: Order line request date defaults from the calculated order line due (ship) date. • No: Order line request dates are blank.
shippingOptions	ERP	No	This field determines the content of the drop-down list associated with the Shipping Method field in the Order Confirmation page. It can have two values: • A list of shipping options to be considered valid during order entry. • ERP, which indicates QAD CSS should use the values defined for the so_shipvia field in Generalized Codes Maintenance in MFG/PRO. If you choose to create a list, use this format: description1 code1^desc2 code2^desc3 code3... The description displays to the user and the code value is passed to the sales order. If you have set up generalized codes on so_shipvia, all the code values must be valid in MFG/PRO.
showDeliveryIcon	Yes	No	This setting determines whether the Delivery button is displayed beside the following buttons: • Add button for each item on the product catalog • Add button in the express order cart • Delete button for each line in the shopping cart The setting values are Yes or No.
showDetailImage	Yes	No	This setting determines whether an image is included in the item detail page that displays when buyers click an item in the product catalog.

Table 6.5 Order Processing Registry Fields (Page 12 of 19)

Key	Default	Over	Usage
showDueOrPromDate	PromiseDate	No	This setting determines which dates, if any, display on the order-related reports that can be viewed by customers as well as the order summary page that displays during checkout. PromiseDate: Promise date displays. Both: Both dates display. None: No dates display. (Any other value): Due date displays.
showExtendedPrice	Yes	Yes	This setting determines whether the extended price is displayed in the shopping cart.
showGroupImage	LEFT	No	This setting determines where images associated with item categories in Item Types Maintenance display. Possible values are: • LEFT displays image to the left of the text. • RIGHT displays image to the right of the text. • NO does not display an image.
showHDOfromlookup	Yes	No	This setting determines if a link for heads-down order entry displays in the OE1 page. This order-entry method may be more suitable for a B2B environment than for a B2C environment.
showHeaderComments	Yes	No	This setting determines if a field displays so buyers can enter sales order header comments. This may be more applicable to B2B than B2C.
showIndexSearch	Yes	No	For OE2, determines if the item search box displays at the top of the left pane during order entry. showLookupSearch has the same effect for OE1.
showItemListLabels	Yes	Yes	Not currently implemented.
showItemType	Yes	No	Not currently implemented.
showLegendBar	No	Yes	This setting determines if icons associated with an item in the Icon List field of Customer Item Maintenance display below the item description in the catalog and a legend bar displays at the top of the product catalog. The legend explains the name of the icons associated with the items as defined in Icon Maintenance.

Table 6.5 Order Processing Registry Fields (Page 13 of 19)

Key	Default	Over	Usage
showLineComment	Yes	No	This setting determines if a field displays so buyers can enter sales order line comments in the shopping cart. This may be more applicable to B2B than B2C.
showLinePromDate	Yes	No	This setting determines whether the promise date is shown for each order line item on the shopping cart and the Finish Order pages. The setting values are Yes or No.
showLineReqDate	No	No	This setting determines if a field displays next to each item in the shopping cart so the buyer can specify a request date. Values are: • No: Line item request dates are not entered. <i>showReqDate</i> is typically Yes in this case. • Yes: Line item request dates are entered. The <i>showReqDate</i> field is typically set to No. However, when both <i>showReqDate</i> and <i>showLineReqDate</i> are Yes, an Apply All button displays beside the header Request Date field. This lets users apply the header Request Date to all order lines. • Required: Same as Yes but input of the field is mandatory during order entry.

Table 6.5 Order Processing Registry Fields (Page 14 of 19)

Key	Default	Over	Usage
showLineSerNum	No	No	This setting determines if a field for update of lot or serial numbers displays in the shopping cart and on the order summary page. Values are: No: Do not allow entry of lot/serial numbers and do not display them on the order summary. Yes: Allow entry of lot/serial numbers for each item and display the entered values on the order summary. Byline: Allow entry of lot/serial numbers only for an item when ShowSerial function returns a value of True. Then display the entered value on the order summary. To activate the Byline setting requires implementers to write custom code for the ShowSerial function to return the correct value. As installed, QAD CSS always sets this value to True. Note: The serial numbers entered when this field is Yes are not returned to MFG/PRO. Implementers must map this value if they want it to be part of the MFG/PRO order; typically it is mapped as a line comment.
showLookupSearch	Yes	No	For OE1, determines if the item search box displays at the top of the left pane during order entry (op_itemlookup.html page). showSearchIndex has the same effect for OE2.
showOProcStatus	Yes	No	For B2C order maintenance, determines if buyers can search orders by status, as well as criteria such as user ID and customer.
showOrderDetailInCheckOut	Yes	No	This setting determines if the order trailer information is calculated and displays on the order confirmation page. Trailer details include taxes and freight, providing an approximate cost of the total order.
showOrderDetailTotals	Yes	No	This field is used in conjunction with ShowOrderDetailInCheckOut to display the totals associated with the details.

Table 6.5 Order Processing Registry Fields (Page 15 of 19)

Key	Default	Over	Usage
showOrderEntryRight	True	No	This setting determines whether a separate right pane should display in the OE1 screens; the right pane always displays in OE2. To completely disable the display of the right pane in OE1 screens, both this field and showRightPane must be No.
showOrderSummary	No	No	This setting determines if an additional instruction screen should display during order submission when payment method is 2, purchase order. This field should normally be left set to No. Setting it to Yes requires a custom implementation to create a custom <code>orderinstructions.html</code> page to display.
showPartialShipper	Yes	Yes	This setting determines if buyers can indicate acceptance of partial shipments. If Yes, a Partial Shipment check box displays during order confirmation. This feature applies to B2B environments more than B2C.
showPriceinConfigurator	Yes	No	When a configured item is added to the shopping cart, a drill-down icon displays next to the item during checkout. Clicking the icon lets the buyer view the features and options. This field determines whether prices are included with the display of features and options.
showPromDate	Yes	No	This setting determines whether the promise date is shown in the order header on the shopping cart and on the Finish Order pages. When the promise date varies per line, the header promise date shows the latest promise date for all lines on the order. If you want shoppers to see different dates for each line, set <i>showLinePromDate</i> to Yes.

Table 6.5 Order Processing Registry Fields (Page 16 of 19)

Key	Default	Over	Usage
showReqDate	Yes	No	This setting determines whether an updateable Request Date field displays in the order header on the shopping cart and the Finish Order pages. The setting values are Yes or No. When this field is Yes and <i>showLineReqDate</i> is No, the header request date applies to each line on the order and cannot be changed. If you want shoppers to be able to change the date for each line, set <i>showLineReqDate</i> to Yes. When <i>showReqDate</i> and <i>showLineReqDate</i> are Yes, an Apply All button displays beside the header Request Date field. This lets users apply the header Request Date to all order lines.
showShipper	Yes	No	This setting determines if the shipping method can be selected during order confirmation. The effect of this field depends on how the <i>shippingOptions</i> field is set: • If multiple options are defined, a drop-down list displays so the buyer can select a method. • If only one method is defined, it is used by default. • If no shipping options are defined, this field has no effect.
showSortBy	wpro_cust_item. item_number	No	This field controls how items are sorted in the product catalog for both OE1 and OE2. You can specify any value in the QAD CSS item table (wpro_cust_item) such as <i>sort_name</i>, <i>cust_part</i>, <i>item_type</i>. The default is <i>item_number</i>. More than one sort value can be specified using a list separated by carets (^).
showUOM	Yes	Yes	This setting determines if the default item unit of measure displays in the shopping cart.
skipViewCartOnAdd	Yes	No	This setting determines if the cart displays every time an item is added. No: The shopping cart displays each time an item is added. Yes: The shopper can choose to display the cart when they want to.

Table 6.5 Order Processing Registry Fields (Page 17 of 19)

Key	Default	Over	Usage
stockAvailBrowse	111111	No	Not currently implemented. This setting controls the display of quantities columns in Stock Availability Browse.
templateOrder	Yes	Yes	This setting determines if a link to template orders displays on OE1 and OE2 pages. If Yes, the Save Order Template button also displays in the shopping cart.
trailerAddress	No, Yes, Yes	No	This setting controls the display of sold-to, bill-to, and ship-to addresses in the order trailer page. Specify Yes or No for each address; when populated, there should be three comma-separated values in the following order: 1. Sold-to 2. Bill-to 3. Ship-to For a B2C and B2B environment, the two critical address are bill-to for account settlement and ship-to for logistics, taxes, and charges.
useCurrencyUnicode	Yes	No	When this is Yes, the system looks for a hexadecimal unicode associated with the item currency in Currency Unicode Maintenance. If one has been defined, it is displayed before the price amounts. If useCurrencyUnicode is No, nothing displays before the price. However, the system always displays the currency code after the price.
useERPOrderNumber	Yes	No	This setting determines the source of the next order number: No: QAD CSS supplies the next order number. Yes: The next order number is derived from Sales Order Control in MFG/PRO. The generation of the order number occurs before the order is submitted to MFG/PRO.

Table 6.5 Order Processing Registry Fields (Page 18 of 19)

Key	Default	Over	Usage
useLangItems	Yes	No	This setting determines how the user's associated language affects the display of items in the catalog. Yes: Only items with the same language code as the user display. No: All items for the customer display regardless of the item language code. Specific language code: Only items with this code display regardless of the user's language code. Blank: Only items with a blank language code display. Note: This setting has no effect on the display of items in Customer Item Maintenance.
userCurrency		No	Use this field to override the currency associated with a user in User Maintenance. When a user logs in to QAD CSS, the system checks for a currency in this order: • First, a currency defined with the userCurrency setting • If blank, the value assigned to the CSS user • If blank, the value from the customer bill-to in MFG/PRO Note: If you are using QAD CSS with Trade Management (TrM), the currency of a user who logs in with a TrM customer is always set to the associated TrM division currency, regardless of the setting of userCurrency.
userCustomerPartNo	Yes	No	Not currently implemented. This field determines how items are validated during heads-down order entry. In this type of ordering, items are validated only when the buyer clicks submit. If this field is Yes, the item must be associated with the customer.
useTemplateQty	No	No	When Yes, buyers can specify an item quantity before submitting a template. This quantity is used as a multiple for each line in the template. For example, you specify a quantity of 10 when selecting a template. The quantity of each line in the template order is multiplied by 10 and added to the shopping cart.

Table 6.5 Order Processing Registry Fields (Page 19 of 19)

Key	Default	Over	Usage
useUserID	LoginName	No	Use this field to determine the value that populates the Entered By field for sales orders in MFG/PRO: • LoginName: The ID of the user who is currently logged into QAD CSS updates the Entered By field, letting you trace the order to a specific user. • Blank: The value of QADUser (see page 270) updates the Entered By field. This is the user associated with the process that updates the sales order table.
vshowItemImage	False	No	This setting determines the default value for the Show Item Image check box displayed in the product catalog for OE1 and OE2. Works in conjunction with vupdateItemImage.
vupdateItemImage	Yes	No	This setting determines if a check box displays in the left pane of the product catalog for OE1 and 2 so buyers can specify if item images should display. Works in conjunction with vshowItemImage.
scripts		Yes	Not currently implemented. Lets you override the location of the QAD CSS scripts specified in System Control Table Maintenance.

Table 6.6 Directory Paths Registry Fields

Key	Default	Over	Usage
images		Yes	Lets you override the location of the QAD CSS image files specified in System Control Table Maintenance.
styles		Yes	Lets you override the location of the QAD CSS style sheets specified in System Control Table Maintenance.

Table 6.7 System Registry Fields (Page 1 of 8)

Key	Default	Over	Usage
b2bURL	http://www.EnterYourB2URLHere.com	No	Not currently implemented. This setting specifies the URL reference to the log-in page for the B2B site.
b2cOrderStatus	False	No	Not currently implemented. This setting defines the display for B2C order history status. This setting determines if shoppers can run the Order Status Report on the customer profile home page. Set this to Yes only if autoExtendNewCustomer is Yes. Otherwise, shoppers may expect to see information for orders that have not been submitted to MFG/PRO.
companyTimeZone	-0800 PST	Yes	The value of the company time zone is used during e-mail communication to report the time zone from which the e-mail originated.
compLogoHref	http://yourcompanylogohref.com	Yes	This setting defines the URL that will be associated with the additional company logo located in the header. Works in conjunction with compLogoName, which defines the image.
compLogoName		Yes	This setting defines the full file name (with extension) of an additional image to display next to host_logo.gif in the header. The system always displays an image named host_logo.gif first.
custDisplayLimit	25	Yes	This setting determines the maximum number of customers to show on the customer selection screen. Customers are associated with users in User Maintenance. Any value greater than 2 determines the number in the drop-down list at log-in. A value less than 2 displays a browse for selecting a company name. Note: If the buyer logging in has only one customer association, the customer selection screen does not display.
defaultCountry	USA	No	This setting defines the default country to use in address records. These must be valid country codes defined in MFG/PRO.

Table 6.7 System Registry Fields (Page 2 of 8)

Key	Default	Over	Usage
defaultCustomerRegistration	userreg	No	The default user for customers set up in User Registration. Values for this user are copied when a new account is set up based on information collected in the online registration form and verified through User Registration.
defaultSite		No	This setting determines the default site for the temporary customer ship-to record created by the system when creating quotes to determine a preliminary order summary in the B2C order process. This value is used only when the customer associated with the defaultCustomerProfile does not have an associated site. The site associated with a customer is always used first.
disableAccount	False	No	This setting determines what happens when the buyer fails to provide a valid user ID and password. When True, the user account is deactivated and e-mail event EX066 occurs. This field works in conjunction with failLoginRetry. When this field is Yes, a user can supply invalid log-in data three times before an account is disabled.
failLoginRetry	Yes	No	When Yes, the system checks disableAccount after three failed log-in attempts and disables the account if required.
exHeaderType	1	Yes	This setting determines the style of the QAD CSS header: 1: Three rows of display: menu buttons, menu, footer 2: Like 1 but has an additional header layer consisting of search, date, user, cart summary, and check out
exHeaderCart	No	No	When exHeaderType is 2, this field controls the display of the shopping cart summary and cart icon in the header.
exHeaderDate	No	No	When exHeaderType is 2, this field controls the display of the system date information in the header.
exHeaderMenu	No	No	When exHeaderType is 2, this field controls the display of an additional Quick Menu bar in the header. If used, you must design the items that display on the Quick Menu.

Table 6.7 System Registry Fields (Page 3 of 8)

Key	Default	Over	Usage
exHeaderSearch	Top	No	When exHeaderType is 2, this field controls where the search object displays in the header. Valid entries are Top and Bottom.
exHeaderWelcome	No	No	When exHeaderType is 2, this field controls the display of message in the header welcoming the user by name, such as Welcome John Smith.
exmenuDefault		No	Not currently implemented.
genMenuHeight	20	No	Tells the index how high the JavaScript menu is. Height is not related to the number of rows, but more to the available menu area. The value should be set based on the resolution of the user's display device. A value less than 20 may result in improper menu display.
genMenuInLine	True	No	This setting controls how the menu is generated. Menus once finalized can be generated in a JavaScript file and stored. True: Generate the menus in real time each time the buyer accesses the home page. False: Use the generated JavaScript file. This should be set to False once the menus are finalized to improve runtime performance. Use the menuDir registry setting to define where the menu JavaScript file is located.
genMenuWidth	180	No	
HDOHeight	215	No	This setting determines the height of the heads-down order-entry frame set.
HDOHeightNS	225	No	This setting determines the height of the heads-down order-entry frame set for Netscape.
hostCopyrightHref	http://www.qad.com	Yes	This setting defines the host copyright URL located in the footer. Change this to a value appropriate for your installation.

Table 6.7 System Registry Fields (Page 4 of 8)

Key	Default	Over	Usage
hostCopyrightText	<center>A Passion For Manufacturing © Copyright 1997-2005 QAD Inc. </center>	Yes	This setting defines the host copyright text located in the footer. Change this to a value appropriate for your installation.
hostURL	http://www.EnterYo ur HostURL.com	No	Not currently implemented. This setting defines the URL of the host's public Web site. Change this to a value appropriate for your installation.
httpsURL	https://www.EnterY our HTTPSURL.com	No	This setting determines the URL of the host when running in secure mode. The standard host URL is built by the system using information determined during installation in the WebSpeed startup files, and does not need to be defined with a registry setting. This setting is required only under the following conditions: • The entire application is not running under SSL protection. (When the entire application runs under SSL, two URLs are never need.) • Port numbers are included in the host URL, such as: http://host.MySite.com:1234.
indexOrder	SEARCH, MOTD, MESSAGE, STATUS	Yes	Can be set to any of the following or any combination of the following: SEARCH, MOTD, MESSAGE, STATUS. This setting controls the display of the log-in page for B2B environment. Based on the value of this field: • SEARCH displays a search box for searching through the product catalog. • MESSAGE displays a user-defined message. • STATUS displays all orders previously placed by the buyer and the order status. • MOTD displays a generic message of the day.

Table 6.7 System Registry Fields (Page 5 of 8)

Key	Default	Over	Usage
indexOrderStatusHistory	30	No	This setting determines how many days of order history are displayed on the Order Status Report. The system looks for orders with an order-entry date up to this many days before today's date. Set this value based on the transaction volume of the company. Note: indexOrder controls what the user sees on the home page and indexOrderHome controls what the user sees on the Order Entry page. These fields determine if order history can be displayed.
itemDetailLink	Yes, Yes, Yes	No	This setting defines which elements related to items are presented as hyperlinks in the catalog to an additional item detail page. Item Layout Maintenance determines the fields displayed in the Product Catalog. Three fields related to the item can have associated hyperlinks that display a detail page: • Item image • Customer item number • Item number The values in itemDetailLink determine the default values for these three fields in Item Layout Maintenance.
itemLayout	111010000011111	Yes	This setting determines the default values for the display check boxes associated with the 15 fields in Item Layout Maintenance. 1 indicates selection of field as default; 0 indicates non-selection. Users can change these fields in Item Layout Maintenance if needed. The values specified in Item Layout Maintenance determine which item details display in the center pane of the product catalog for OE1 and OE2.
itemLayoutHeader	Description, Item, Additional Info, Available, Price/UM, Quantity	No	This setting defines default values for the Header Label fields in Item Layout Maintenance. These, in turn, determine what displays above the associated column in the product catalog for OE1 and OE2.
itemLayoutHeader-eng	Description, Item, Add'l Info, Avail, Price/UM, Add	No	This setting defines the column labels for the selected item details to be displayed in OE1 and OE2 for the English language.

Table 6.7 System Registry Fields (Page 6 of 8)

Key	Default	Over	Usage
itemLayoutLabel-eng	,,,,,,,,,Def:,,All:,,,qty: ,,	No	This setting defines the side labels for each detail for an item in OE1 and OE2 for the English language.
itemLayoutLabel	,,,,,,,,,,,,,qty:,,	No	This setting defines default values for the Side Label fields in Item Layout Maintenance. These, in turn, determine what displays to the left of the item detail in the product catalog for OE1 and OE2.
itemLayoutName	Sort, Desc 1, Desc 2, Customer Number, Part Number, Other 1, Other 2, Other 3, Other 4, Available (Default), Available (All), Price, UoM, Quantity	No	This setting is not currently used. It has been replaced by the language specific registry settings. This setting defines the default descriptions for the elements displayed on Item Layout Maintenance.
jmsgDir	/qadcss/scripts	No	Specify the full path to the directory where generated error message files are located. <i>QADCSSInstallDir/scripts</i> is recommended. To support multiple languages, QAD CSS places generated error message files in language- specific subdirectories under the directory specified. Messages are read from a generated JavaScript file at runtime.
launchpointHeight	85	Yes	Not currently implemented. This setting determines the height of the frame set that displays when QAD CSS is opened from a link in another page.
lmenustartMenuX	2	Yes	This setting defines the number of pixels for the menu's horizontal position when genMenuInline is True. If not set, a default value of 7 is used. This accommodates both header types.
lmenustartMenuY	140	Yes	When genMenuInline is True, defines the number of pixels for the menu's vertical position. If not defined, the default is 112. If exHeaderType is 1, the default value of 112 is adequate. When exHeaderType is 2, a higher value such as 240 is better.

Table 6.7 System Registry Fields (Page 7 of 8)

Key	Default	Over	Usage
lpMenuWidth	180	No	This setting defines the menu's width. If not defined, the default is 222.
menuBackGround	#003466	Yes	Sets the background color for the index menu. If not defined, the default is #596D99.
menuBackGroundOver	#000066	Yes	Sets the background color for the highlight bar or the cursor, when the focus is placed on the menu. If not defined, the default is #363ACC.
menuDir	/qad/mfgpro/92/css test/qadcss/scripts	No	When genMenuInline is False, defines the directory location where the menu JavaScript file is stored after generating. Menus are generated in Menu System Maintenance to support multiple languages and improve runtime performance.
menuHeaderBottom		No	This setting defines an additional image to display below the main company logo (always <code>host_logo.gif</code>) in the header.
menuHeaderClass		Yes	This setting defines the style class for the menu header. The default value is the default body class.
menuHeaderSpace	No	No	This setting determines if extra space is needed in the header to accommodate the display of the company logo. If the <code>host_logo.gif</code> cannot be compressed to fit within the upper-left corner, this lets you insert an additional space between the graphic and the menu buttons.
menuWindowOptions	width=700, height=700, scrollbars=1, toolbars=1, statusbar=1	No	Not currently implemented. Determine the properties of the window that opens when QAD CSS is opened from another Web page.
minPasswordLength	6	Yes	This setting defines the minimum password length.
partslookuplogo	parts_look.gif	Yes	This setting determines the name of the image file displayed on OE1 prior to the execution of search.
registrationURL	http://license.qad.com/ scripts/lic.wsc/cl/ cl_checkreg.html	No	The URL of the QAD CSS license server used to obtain a clearance code. Note: Both the key value and usage fields must be set correctly. For usage, specify the following URL: http://license.qad.com/scripts/wsisa.dll/WService=live/cl/cl_checkreg.html

Table 6.7 System Registry Fields (Page 8 of 8)

Key	Default	Over	Usage
reportFooterLogo	host_logo.gif	No	Not currently implemented. This setting specifies the name of the image file displayed at the bottom of reports. If left blank, the <code>host_logo.gif</code> is used; this image is always used on the header.
runSecurePages	Yes	No	Not currently implemented. Makes pages in the application that use the <code>makeSecure</code> function run under https (SSL). This is required for credit card implementation.
showAddLoginInfo	No	No	Tells the menu bar if additional log-in information should be shown.
showRightPane	Yes	Yes	This setting determines if the right pane displays throughout the system. The OE2 option always displays the right pane, regardless of the value set in this field.
userMessageArchive	True	No	This setting determines if user messages are archived or deleted from the main index page. No: Messages are physically removed when the index page redisplay. Yes: Messages are marked for deletion but not physically removed.

Glossary

Action Icon. An icon that performs an action when clicked, such as displaying a detailed description, image, or PDF corresponding to an item. For example, a camera icon suggests that a picture is available for an item.

Authorization. The process of communicating with a credit card processing partner to obtain permission from the issuer of a credit card to charge a given amount to that specific card. The authorization is tied to an individual QAD CSS order and the resulting MFG/PRO sales order.

AVS Code. Address Verification Service codes are a credit card fraud prevention tool designed for telephone or electronic ordering scenarios, where the customer is not present to show identification.

Codes are assigned based on the degree of match between the ship-to address for the order and on-file address information associated with the credit card used. For example, when an AVS code of N is returned—meaning that the order address does not match either the street address or zip code on file with the credit card issuer—the merchant might choose to put the order on hold pending further verification.

Business to Business (B2B). The exchange of products, services, or information between businesses rather than between businesses and consumers. For example, a company that supplies large quantities of material to manufacturers is a B2B supplier.

Business to Consumer (B2C). The exchange of products, services, or information between businesses and consumers. For example, an online retailer of books has a B2C operation.

Customer Item. An item made available to a customer or customers that typically displays the item code used by the customer. This item code is cross-referenced to the appropriate item number in MFG/PRO. The availability of items can be restricted by customer.

External Administrator. A person at an outside company who is authorized to administer the user accounts of their own QAD CSS users.

Information Icon. An icon that provides more information about a corresponding item, such as a picture indicating an item is new.

Marketing Group. A group of users targeted for marketing purposes, such as offering a limited-time discount to members of specific groups. The behavior of the site can also be controlled by marketing group.

Module. A function displayed on a QAD CSS menu. A module is also used to define a group of related functions, such as op for order processing functions.

Primary Index. A key value that identifies a database record as unique. QAD CSS stores primary index information in an internal database table for use in application development.

Registration. The process of having the shopper enroll to make purchases through the electronic storefront. During registration, the shopper selects a user name and password and enters address information that is used to create a customer master record in MFG/PRO.

Security Group. A group that limits its members to specifically defined QAD CSS functions and menus. Security groups are typically based on the functional roles of users; for example, separate groups for customers, administrators, and support staff.

Session. The recorded activities between the time a user signs in to a QAD CSS Web site and the time that user logs off. QAD CSS assigns a unique session ID each time a user signs in.

Shopper. Someone placing an order at an electronic storefront. When the order is placed in MFG/PRO, the shopper is identified in a customer master record.

Special. A group of items featured to customers when they visit an electronic storefront. Specials, often referred to as promotions, can be offered to all visitors or selectively offered to specific marketing groups.

Style Sheet. A document associated with Web pages that consistently controls the appearance, placement, and behavior of text when viewed in an Internet browser.

Super Layer. A group of architectural layers of common procedures and functions in QAD CSS that establishes the order in which these layers are loaded and their relationships to each other.

System Registry. A virtual control table in QAD CSS comprised of keys and values used to establish how QAD CSS dynamically interprets and processes business rules. The system registry can be used to tailor QAD CSS functionality for specific users or groups of users.

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