Implementation Guide

QAD Customer Self Service (QAD CSS)

Overview
Populating a QAD CSS Database
Users and Security
Customizing Web Site Appearance
Managing Order Entry
B2C Order Processing
Contacts and Messages
Integration with QAD EA
Implementation Test
System Registry Fields

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QAD CSS Implementation Guide Change Summary

The following table summarizes significant differences between this document and the last published version.

Date/Version	Description	Reference
September 2014/CSS 5.4	Updated the information on B2C Implementation	Page 114
	Updated the information on defining a credit card vendor	Page 124
	Updated the information on the credit card data frame launched from Sales Order Credit Maintenance	Page 132
March 2014/CSS 5.3	Added Single Sign-on	Page 42
	Updated descriptions about using the style sheets	Page 48
	Added Setting Images Through Cascading Style Sheet	Page 54
	Added Customization Best Practices	Page 58
	Updated the description about the system registry *exHeaderType*	Page 66
	Added Using Order Upload	Page 110
	Updated the section Associating Programs with E-mail Events	Page 148
	Adds a system registry *exHeaderButtonIcon*	Page 189
	Adds a system registry *stylesheet*	Page 193
September 2013/CSS 5.2.3	Rebranded for CSS 5.2.3	-
March 2013/CSS 5.2.2	Updated the information for creating users in User Maintenance	Page 37
	Updated the description about the field *Post to QAD Core*	Page 97
	Updated the description about the registry setting *searchList*	Page 134
	Added an e-mail event *EX073*	Page 145
September 2012/CSS 5.2.1	Updated the section Configured Item Defined with Configured Products Module	Page 82
March 2012/CSS 5.2	Added Product Configurations in Catalog, Shopping Cart, Order Review, and Reports	Page 72 Page 80 Page 88 Page 92
	Added a note about ATP check	Page 102
	Added a note about B2C Implementation	Page 114
	Added a note about the *addItemOnce* setting	Page 173
	Added the *ConfiguratorWSURL* system registry setting	Page 188
	Added the *ShowSTDEXTConfTabs* system registry setting	Page 194
September 2011/CSS 5.1.3	Rebranded for CSS 5.1.3	-
	Deleted a note about IE 7.0 not supported with Creating Item Catalog	Page 23

Date/Version	Description	Reference
	Changed pictures and descriptions about Catalog Upload	Page 23 Page 33
	Changed pictures and descriptions about customer selection during login	Page 45
	Added supported browser Mozilla Firefox	Page 48
	Changed pictures and descriptions about Features and Options	Page 82
	Added supported browser type and version	Page 161
	Added the *orderEntryRightUI* system registry setting	Page 176
	Added the *searchMethod* system registry setting	Page 181
	Added the *setDueDate* system registry setting	Page 181

Chapter 1

Overview

This chapter provides an overview of the features of QAD CSS and the planning steps required to complete a QAD CSS implementation.

Overview 2
Discusses how QAD CSS can be used in B2B and B2C scenarios, with a section on using the guide.

Implementation Planning 3
Lists and describes various considerations that are made before setting up CSS.

Using QAD CSS with Domains 5
Explains how CSS uses domains and lists the functions that require specified domains.

Using Registry Settings to Customize Your Web Site 6
Explains how CSS can be tailored by the system registry, discusses primary and optional user IDs, and how they are evaluated and used.

Implementation Checklist 7
Lists and describes implementation checklist steps.

Overview

QAD Customer Self Service (QAD CSS) is a Web-based order-entry application designed to work with QAD Enterprise Applications (QAD EA). It supports either business-to-business (B2B) order entry or business-to-customer (B2C) order entry.

With QAD CSS, you can:

- Integrate and implement 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 QAD EA 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 vs. B2C

QAD CSS can be used in two different business scenarios:

- In the B2B scenario, you sell items through your Web site to established customers that are defined before they access your site and log in to establish their identity. These customers may buy the same items on a regular basis and use features like order templates. They often buy with purchase orders. When the order is shipped, an invoice is generated. B2B customers may have access to account information and order history that would not be available to a casual shopper.
- In the 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.

The requirements of these two scenarios affect how you design and set up your Web order-entry system. You do not, however, have to choose only one or the other type of setup. You can design a site that accommodates both types of buyers using security groups and other features of QAD CSS.

Using This Guide

This guide provides the information on setting up and configuring your QAD CSS site based on your specific business requirements. Review all of the information in this guide before completing your planning to understand the many optional settings that you can use to configure specific features.

Important If you want to implement advanced features or use features that require customization, you should consider engaging QAD Global Services to support this effort. This guide supports basic implementation; it is not intended to provide guidelines on custom modifications.

The following topics are addressed in this guide:

- Chapter 2 discusses how to populate the QAD CSS database with information about the items and customers you have defined in your QAD EA database.

- Chapter 3 describes how to set up security groups and define users, as well as other functions controlled through security including the menu bar and menus.
- Chapter 4 describes aspects of the user interface (UI) and how they can be modified so that the QAD CSS Web site has the same look and feel as your corporate Web site. It discusses modifying elements of the UI controlled through cascading style sheets—such as colors and fonts—as well as managing images.
- Chapter 5 describes the order-entry process, from the initial access to the Web site, through the final confirmation of the order. It discusses in detail the many settings you can use to tailor order features.
- Chapter 6 discusses the unique features of B2C order processing and how to implement them using QAD CSS. It also describes credit card processing, which can be used in both a B2B and B2C scenario.
- Chapter 7 describes how to implement contact lists and various types of messages to support your user community.
- Chapter 8 provides details of the integration between QAD EA and QAD CSS, including the data elements that are passed between the two applications.
- Chapter 9 describes some steps for testing the integration between QAD EA and QAD CSS before rolling out a production Web site. Settings useful in troubleshooting and analysis are also described.
- Appendix A summarizes all of the control settings that can be used to manage your implementation.

Use this guide together with *Administration Guide: QAD Customer Self Service*. The administration guide includes details of how to use each of the functions provided for managing your QAD CSS database. This implementation guide concentrates on the steps involved in initially designing and implementing your site. Many of the administrative functions are in use during implementation, but the details on how to use them are not repeated here.

Implementation Planning

Setting up a Web site involves coordinating activities that may be spread across many company departments. As you begin planning, make sure that you have got input from such key areas as Marketing, Finance, and IS.

Input from Marketing is especially critical because the way you organize your items on the Web could be different from the way they are organized in QAD EA. Carefully consider the organization to streamline the population of the QAD CSS database with item information.

During loading of item information, much data that is unique to items in QAD CSS is specified. The Marketing department is obligated to provide most of this information.

In addition, consult your Marketing department regarding colors, images, and other look-and-feel issues related to the appearance of your Web site. Perhaps they can also supply the text for frequently asked questions and for messages of the day.

When you plan your activities, guarantee that time is available for testing the implementation and integration with QAD EA before rolling the site out for public use.

The following list presents some of the issues you should consider in planning your site. However, this list is just a suggestion of options for you to consider. QAD CSS is highly flexible to support many different kinds of business models. Review this entire guide to ensure that you understand all of the options available.

What optional features in QAD EA are you using?

Many optional features in QAD EA affect the maintenance of sales orders, including the following:

- Logistics Accounting
- Customer Consignment Inventory
- Customer Reserved Locations
- Shipment Performance
- Container and Line Charges
- Available-to-Promise (ATP) Enforcement

If you have enabled any of these features, make sure that proper default values have been defined for additional fields and pop-ups that may display during the load of a sales order created in QAD CSS.

Who do you plan to sell to?

Will you sell to casual users who browse your site without logging in (B2C) or to customers and distributors with whom you have a long-term relationship (B2B)? Do you want to sell to both types of customers? The answer to this question affects how you set up security, users, and customer records.

Do you want to let users update their own personal information? Do you want to let new users apply for an account on your system? What menu pages do you want users to see? Do you want to be able to vary the appearance of the site based on a user's group membership?

How do you want to populate the catalog?

Note The combination of items and item categories is collectively known as the *catalog*. Item categories represent the way you group items hierarchically for presentation on the Web site.

What items do you plan to sell and how do you want them grouped? Do you want items associated with specific customers or available to all customers? Are you going to use images in the catalog? Do you provide any additional detailed descriptions and, if so, how do you want users to view them?

How do you want buyers to be able to search for items? By default, search is supported for item number, item description, and item category, but you can add other fields if needed.

How do you manage orders?

How do you want the order process to work in QAD CSS? Are users allowed to enter comments? Select a shipment method? Enter a request date on each line or only on the header? Can users select the same item more than once for the same order? Are users allowed to project the quantity available to promise (ATP) for sales order line items?

How do you want the order to be loaded into QAD EA? Will orders be confirmed? Will they have a special prefix to identify them as coming from QAD CSS?

What payment methods do you choose to support?

Your customers can pay for items using purchase orders or credit cards. If you want shoppers to be able to pay by credit card, additional configuration and implementation steps are required.

How do you communicate with users?

Who should users contact for assistance? Do you want to incorporate automatic e-mail notifications into your order-processing flow? Will you have messages that change based on data ranges or targeted at specific users or marketing groups? Do you want to supply frequently asked questions and answers to help users understand your site? If so, who will write them?

Using QAD CSS with Domains

Each domain in a QAD EA database represents a single business operation with distinct operational requirements and settings. Although a QAD EA database can have any number of domains, you probably want to place orders through QAD CSS that affect only a subset of these domains.

CSS uses the concept of data sources to accommodate the presence of multiple domains in the QAD EA database. The data sources (domains) you want to use in your implementation are defined in Data Source Maintenance before other records that are domain-specific can be defined.

All functions that relate to items and customers in QAD CSS require that you specify the associated data source (domain). These functions include:

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

See “Setting Up the Default B2C User” on page 117.

When a B2B user logs in to CSS, the system knows which domain to access based on the user’s associated customer record. In a B2C scenario, the user is undefined, so the system must use a default domain. This default is determined by checking the domain associated with the record specified for the *defaultCustomerProfile* registry setting.

The user’s domain determines which items they can view in the catalog.

Using Registry Settings to Customize Your Web Site

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 values. You use these keys to establish how QAD CSS dynamically interprets and processes business rules.

Over two hundred settings affect every aspect of system processing from how users log in to what displays in the catalog and how an order is submitted. Appendix A, “Registry Settings”, on page 170 lists each registry setting with a brief description. Each of these settings is also described in context in the various chapters of this guide so that you can understand how to use it to model your own business requirements.

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 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 receives the items being ordered. A user can be associated with more than one customer; for example, distributors can enter orders for multiple customers. During login, 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 requires 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 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 want all members of the OEM customer group except for customer 1003 to see a certain catalog layout. In this case, make sure that Override is set to Yes for all of the custom settings that you create for customer group Retail. Thus the system can continue 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. Make sure that the default registry setting for Override is set correctly to accommodate your implementation planning; otherwise, you might possibly 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. In this scenario, 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.

As you plan your implementation, consider how you want to use the features of the system registry to enhance your Web-based order-entry system. Many different combinations of values are possible.

Important It is recommended that you start with a basic implementation and thoroughly test it. Then add more variation in settings when you are sure that the basic system is functioning as you expect.

Implementation Checklist

The following checklist can be used to validate the scope of activities required to implement your QAD CSS Web site. References are made to detailed information related to these activities.

The activities do not necessarily need to be done in this order. Many activities can be done in parallel. Where dependencies exist, they are noted.

1 Plan the Web site design.

2 Install QAD CSS and verify all system settings.

See *Installation Guide: QAD Customer Self Service* for information on installing the product and verifying the database connections.

Use System Control Maintenance to verify system settings such as the various directories that QAD CSS uses and settings for enabling e-mail communication.

See “Populating a QAD CSS Database” on page 11.

3 Populate the QAD CSS database.

- Define the domains that your QAD CSS installation can interact with.
- Export item and customer information from QAD EA.
- Load this data into spreadsheets and add additional information used in QAD CSS, including the categories used to group items for display and the location of item images.
- Load customer information into QAD CSS.
- Load item information, creating the required item categories.

You may need to iterate through this process several times to validate the design and ensure that items are categorized in a meaningful and useful way.

See “Users and Security” on page 35.

4 Define security groups and users and determine what functions each group of users can execute.

Note Users and security for B2C are discussed with the B2C implementation.

- Define security groups in Security Group Maintenance. Make sure that you set up security groups before the setup of users, because when you define users, you are required to specify the security group.
- Define users in User Maintenance. Make sure to associate each user with a customer after loading customers.
- Set up online registration if you want users to be able to request accounts from your site.
- Set up personal administration if you want users to be able to modify their information themselves.
- Assign security groups to menu buttons and menus in Menu Button Maintenance and Menu Maintenance.

See “Customizing Web Site Appearance” on page 47.

5 Customize the appearance of the Web site.

- Modify style sheets to correspond to your corporate look and feel.
- Collect the images you use in various areas of the site.
- Develop icons to be displayed in the catalog or other areas of the screen.

See “Managing Order Entry” on page 61.

6 Design your order-entry system.

- Review the registry settings that affect each area of order processing and determine the settings you want to use.

Note Most of these settings apply to both B2B and B2C scenarios. Additional considerations apply to B2C.

- Use Item Layout Maintenance to define settings that determine how items display in the catalog.
- Use Item Types Maintenance to define additional settings related to your item categories.
- Use Order Control to specify system-wide settings that affect order processing.
- Use Carrier Href Maintenance to specify links to carrier Web sites for tracking shipments.
- Use Specials Maintenance to display information about special promotions.

See “B2C Order Processing” on page 113.

7 Design B2C order-entry settings.

- Create the B2C user account and B2C security group required for B2C processing.
- Implement credit card processing.

Note Credit cards can also be used in a B2B scenario.

- Define settings that control the B2C order-entry process.

See “Contacts and Messages” on page 141.

8 Define how users can contact you and how you communicate with users using messages, FAQ, and e-mail.

9 Address multiple language issues. You can use various administrative functions to define the currency symbol, determine which fields are translated, set up languages, and maintain translated strings. These activities are not described in this guide. You can review the details in *Administration Guide: QAD Customer Self Service.*

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

See “Implementation Test” on page 159.

10 Test the system by processing orders and running reports to ensure data integrity. Set up options to help in debugging and monitoring during the test phase.

11 Roll out the system for live use.

Chapter 2

Populating a QAD CSS Database

This chapter describes how to create the QAD CSS customer and item records that correspond to QAD EA records.

Introduction 12
Discusses data sources, items, item categories, customers, customer and item relationships, and master customers.

Creating Customers 15
Lists prerequisite considerations, explains how to use the Customer Load function, design customer queries, prepare customer records to load, and review logs and correct errors.

Creating an Item Catalog 22
Lists prerequisite considerations and explains how to design item queries, plan catalog organization, plan item images, plan additional item data, prepare item records to load, and review logs and correct errors.

Introduction

QAD CSS lets your customers create QAD EA sales orders through a Web order-entry system. The main data points that are shared between QAD CSS and QAD EA are customers and items.

Note Loading customer records may not be an issue in some B2C implementations since B2C customers are not typically known ahead of time.

Data Sources

See “Using QAD CSS with Domains” on page 5.

All items and customers belong to a specific domain. An initial domain is created during installation so the administrative user can log in to the system. You can define additional domains for use before you load information from QAD EA by using Data Source Maintenance on the QAD CSS Administration|System Control menu.

Items

Populating item data in the QAD CSS database is a key step in implementing QAD CSS. The items that you sell on your Web site must also exist in QAD EA. Typically, these items are already defined in QAD EA and tools are provided to help you use this information to populate your QAD CSS catalog.

However, items viewed for selection from a Web order-entry system must have information associated with them that is not used during the creation of a standard sales order in QAD EA. This may be information that you have not previously considered and that you must define before setting up your QAD CSS item catalog.

In addition, QAD CSS uses the concept of a category to group items for display in the catalog. Categories represent hierarchical family relationships up to five levels deep. You plan the category layout during implementation and decide how you want your items displayed.

As a result, item data cannot be directly loaded into QAD CSS. Instead, a three-step process is used where data is first extracted from QAD EA into a comma-separated values (CSV) file and loaded into a spreadsheet. You then add the additional information that QAD CSS requires. When this update is complete, you load the data into QAD CSS.

You can use the QAD CSS Customer Item Maintenance function to modify information later if necessary.

Item Categories

Grouping items into categories is fundamental to the display of items on your Web site. You add the category information into the item spreadsheet before you load the items. Loading the items creates both the item record and the category record (also know as an item type in QAD CSS).

See “Order-Entry Types” on page 62.

If needed later, you can use Item Types Maintenance in QAD CSS to modify the category data. If you are using order entry 2, you also use this function to associate images with categories.

Customers

In addition to items, you can also set up customer data in QAD CSS. In a B2B order environment, you can have established customers. The customer data from QAD EA can be used in setting up customers in QAD CSS. In a B2C environment, customer data is typically not required.

Customers in QAD CSS, like items, can have additional attributes that do not exist in QAD EA. The customer group in QAD CSS is an important attribute because the group can be used as a key value in the system registry to control the behavior of the order-entry system. Using customer groups lets you tailor the appearance and sequence of the order-entry screens based on common customer requirements.

To manage this additional data that QAD CSS requires, a similar multiple-step process is used:

- Extract customer data from QAD EA.
- Add additional field values using a spreadsheet.
- Load the data into QAD CSS.

You can use the QAD CSS Customer Maintenance function to modify information later if necessary. However, QAD EA is supposed to be the source of customer information.

Note Only customer data is loaded into QAD CSS. Customer address data is stored in QAD EA. Any address data in QAD CSS is temporary.

Some data associated with customers in QAD EA affects the order-entry process. For example, when the PO Required field is set to Yes for the customer record in QAD EA, entry of a PO number is also required during order entry in QAD CSS.

Customer and Item Relationships

When you plan customer and item data for QAD CSS, make sure that you consider the relationship between customers and items. In QAD CSS, items are associated with customers. You manage the items that a customer can see in several ways:

- Through loading items with a blank customer record
- Through loading items for one or more master customers and then associating master customers with other customer record
- Through registry settings

The *searchList* registry setting determines the exact effect of the other options.

Because of this relationship between items and customers, you are required to set up customers first in QAD CSS before loading the item data with customer values included.

Blank Customer

You can load items with no value specified for customer (a blank customer value). These items can be visible to all customers that log on to your Web site.

Note Unless you create a customer with a blank value for ID, you cannot modify any values associated with these items using the standard QAD CSS Customer Item Maintenance function. The reason is that QAD EA is considered the source of item information.

Master Customers

It is possible that you have groups of customers that want to see the same items, but not necessarily all items. To eliminate the need to create a record for each customer that orders an item, QAD CSS uses the concept of a master customer. An item is associated with a master customer and the master customer is associated with multiple specific customer records. All customers associated with the master customer inherit the items associated with the master customer, as well as any items assigned specifically to them.

Example You sell finished goods to dealers and spare parts to parts distributors. You want the dealers to see a different view of the catalog than distributors. You create two master customers: a finished goods customer (FG) and a spare parts customer (SP). You load finished goods for the FG customer and spare parts for the SP customer. You then associate all your QAD CSS customer records with the appropriate master customer that represents their business role. Each customer then inherits the items associated with the master customer.

SearchList Registry Setting

The *searchList* registry setting determines how the search engine looks for items to display to a user. It can have two values:

- Master (or blank): Display items not associated with a customer. This value is the default value.
- Customer: Display items associated with the currently logged-in customer or items associated with any customer IDs specified in the Master Customer field for the current customer. If no customer IDs are specified for the Master Customer field, only items associated with the current customer are found.

Note Do not confuse this use of master with master customers. In this context, the master catalog represents items available to all customers, not master customers.

Different Scenarios

Set the *searchList* field based on how you have loaded information about items and what you want to display. Table 2.1 illustrates all of the possible scenarios that you can create by loading various kinds of data and changing the setting of *searchList.*

Table 2.1
Combinations of Master Customer Settings

searchList	Master Customer	Result
Master	Blank	Display all items not associated with a specific customer
Master	Customer ID	Display all items not associated with a specific customer; any values specified in the Master Customer field are ignored.
Customer	Blank	Display only items for this customer

searchList	Master Customer	Result
Customer	Customer ID	Display items associated with current customer and the specified customer. Customer ID can be a comma-delimited list of customer IDs.
Customer	, (comma)	Display items associated with the current customer and items not associated with any customer. The comma tells the system to look for the blank customer.

When *searchList* is Customer, you can use the comma in addition to one or more customer IDs to display all the items associated with the blank customer as well as items associated with one or more master customer IDs.

Example Specify `,4000` or `4000,` to display items associated with the blank customer and items specified with customer 4000. Specify `,4000,5000` or `4000,5000,` or `4000,,5000` to display items associated with the blank customer and items specified with customer 4000 or customer 5000.

Creating Customers

Before loading customer data into QAD CSS, plan this activity carefully.

- Determine the QAD EA domains that you plan to interact with.
- Determine which customer records you want to share between the two systems
- Then plan the information you want to supply for the customers in QAD CSS and decide if you are going to use customer groups and master customers.

To complete the process of updating customer data in QAD CSS with the data in QAD EA, you use the Customer Load function on Administration Menu|System Control Menu in QAD CSS.

Note Only active customer records with complete customer data in QAD EA can be loaded into QAD CSS.

This function creates and uses files in comma-separated values (CSV) format. When you execute the load functions, make sure that Microsoft Excel is installed and available on the local computer. Microsoft Excel can then read and manage files in CSV format.

The CSV files are created in a work area on the server defined during installation in the WebSpeed startup file, `ubroker.properties`, as the fileUploadDirectory. Since users executing load functions possibly have not updated access to this directory, it is recommended that the CSV files be saved locally.

Customer Load leads you through a series of steps:

1. First prepare QAD EA records for import into QAD CSS.
   a. Choose the domain with records you want to import.
   b. Choose customer records you need for the Web by entering selection criteria to pinpoint the exact records you want to extract from QAD EA.
   c. Then extract these records from QAD EA. The system displays them in an Excel spreadsheet.

d Save this spreadsheet in a work area so that you can add additional information.

Note This step is necessary since you may not have access to the directory on the server where QAD CSS is installed.

e Update the additional columns in the spreadsheet with data to be used in QAD CSS.

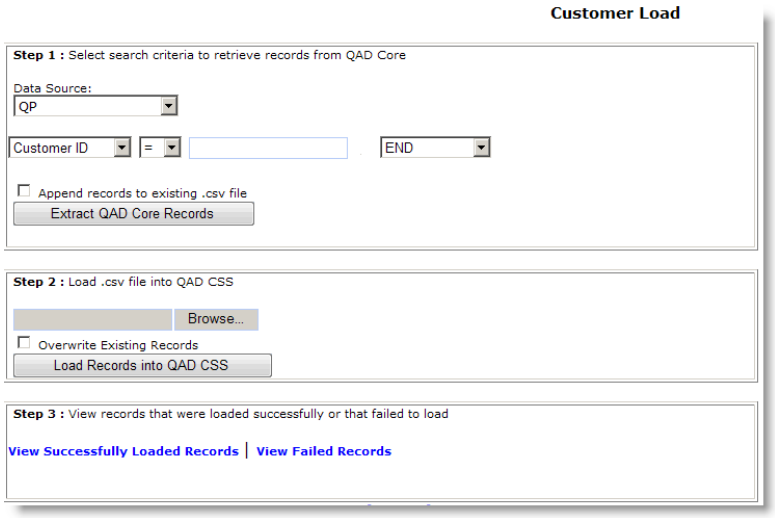
2 You then load this data into QAD CSS, creating or updating customer records. This step creates two log files detailing records successfully loaded as well as those records that cause errors.

3 The final step is to review the log files, save them as an audit trail, and resolve any problems with records that did not load. You can then reload these records to complete the activity.

Important The load function depends on the spreadsheet columns being in an expected sequence. While you can add data to the spreadsheet, do not delete columns or modify the column order. Also save the file in CSV format rather than as an Excel document.

Figure 2.1 illustrates the Customer Load function.

Fig. 2.1
Customer Load



For details, see “Using QAD CSS with Domains” on page 5.

The following sections discuss each step in this function separately, beginning with the planning activity.

Designing Customer Queries

It is likely that not all customers defined in your customer data in QAD EA will purchase items from your Web site. By determining whether those customers that you expect to purchase from the Web have any common characteristics, you can extract customer records based on filters. The Customer Load function lets you select customers by ID, name, site, type, region, promotion group, and date added.

Note The promotion group field is for reference and can be used as needed.

Important Consider performance when choosing selection criteria. System performance is best when selecting records by customer ID; all other selections are not indexed, which may degrade performance.

Before using the Customer Load function, use functions like Customer Browse (2.1.2) and Customer Data Report (2.1.4) to review the data of your customers in QAD EA. Then you can decide on the selection criteria you want to use.

The Date Added field is important for continuing synchronization with QAD EA. Note the date that you initially populate your QAD CSS database. Later, you can select items by date added to retrieve only new records that requires loading.

Important There is currently no way to track records that are modified. You are required to establish internal procedures for managing changes that affect customer records. But since the number of data attributes shared between QAD CSS and QAD EA is small—customer ID, name, and default site—this issue will probably not be seen frequently.

Query Operators

You can use the following operators with filters:

=	The system returns records with attributes that exactly match the value you specify.
<>	The system returns records that are not equal to the one you specify.
<	The system returns records with attributes that start with a value less than the one you specify.
<=	The system returns records with attributes that start with the value you specify or any value lower than it.
>	The system returns records with attributes that start with a value greater than the one you specify.
>=	The system returns records with attributes that start with the value you specify or any value higher than it.

Query Commands

You can use the following commands with queries:

End: The search criteria is complete.

And: A new row is added. Both the current search criteria and the next must be true for records to be selected.

OR: A new row is added. Either the current search criteria or the next one must be true for records to be selected.

Insert Row: Adds a row after the current row within a group. Use this command to add intermediate conditions within an already defined set.

Delete Row: Remove this criteria from the search. You cannot delete a one-row filter.

New Group: Creates a new row for a filter distinct from the preceding set of filter rows. Grouping tells the system in what order to apply a series of operators. A group is removed when the last row of the group is deleted.

Understanding Grouping

When you search for more than two attributes using a mixture of AND and OR operators, indicate what order you want the system to use when applying the operators.

For example, you want to extract customers in the East or West region that have a customer type of consumer.

This could be stated as:

East OR West AND Consumer

If you enter these as three query statements without grouping, the system will return all customers in the East region (regardless of type) and all customers in the West region that are consumers. You need to tell the system to apply the AND condition to the results of the OR condition. In equations, you do this by using parentheses to tell the system what order to apply the operation:

(East OR West) AND Consumer

In the Customer Load function, you do this by indicating a group: the East or West conditions are one group; the AND Consumer is a second group.

Query Example 1

This example illustrates how to find a range of records. Doing this with Customer Load is a little different than most QAD EA programs that let you enter a From and To value.

You want to extract all customer records with an ID between 010000 and 019999.

1. Select Customer ID as the search parameter, >= as the operator, and 010000 as the value. Then choose AND to continue the query based on customer ID.
2. Select Customer ID again as the search parameter, <= as the operator, and 019999 as the value. Then choose End to complete the query.

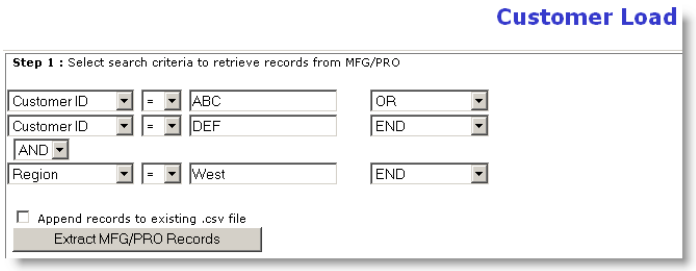
Query Example 2

You want to extract all customer records with a customer name of ABC or a customer name of DEF that are located in region West.

1. Select Customer Name as the search parameter, = as the operator, and ABC as the value. Then choose OR to continue the query based on customer name.
2. Select Customer Name again as the search parameter, = as the operator, and DEF as the value. Then choose New Group to qualify this search using a new parameter.
3. Specify Region as the search parameter, = as the operator, and West as the value. Then choose End to complete the query.

This query is illustrated in Figure 2.2. You can see how the grouping helps make the logic of the query clear.

Fig. 2.2
Customer Query Example



Planning Additional Customer Data

When you extract customer data from QAD EA, only three fields are included: the customer number, name, and default site for ordering items. For each customer record, you can supply the following additional information used by QAD CSS:

See “Using Registry Settings to Customize Your Web Site” on page 6.

Customer Group. You can use the customer group as a key value in the system registry to control the behavior of the 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 maximum eight characters.

See “Setting Up E-Mail Events” on page 143.

Customer E-Mail. The e-mail address associated with the customer is used in QAD CSS to notify customers based on pre-defined events that you set up or to provide answers to customer queries.

Default Site. This represents the default site for calculating quantity availability in QAD EA. A default site is defined in Item Master Maintenance (1.4.1). You can use this field to override the QAD EA default with a different value.

See “Master Customers” on page 14 for details on how the system uses this field.

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

Grouping customers under master customers can streamline and simplify the management of items, since you do not need to have as many separate records to maintain.

The decision whether to use master customers is related to how you plan to implement your catalog. If you do intend to associate master customers with other customers during the load, you should be aware of the following:

- If the master customer associated with a customer is not already defined as a customer, the load creates the master customer with no data other than the customer ID.
- If the master customer is defined later in the spreadsheet with additional data, that data will update the customer record in QAD CSS only if you have selected the check box that lets you overwrite existing records; otherwise, an error is generated.

Prepare Customer Records to Load

Use the Customer Load function on the QAD CSS administrative menu to execute these functions.

Select Records to Extract from QAD EA

To extract the data you need:

1. Choose the domain with customer records you want to load.
2. Enter the customer attribute to use for selecting records in the first field. The choices are customer ID, name, site, type, region, promotion group, and date added.

See “Query Operators” on page 17.

3. Choose an operator from the list: =, <>, <, <=, >, >=.
4. Enter the value you want to match on, such as region = West. You determine these values from QAD EA, since your input is not validated on the Customer Load screen.

See “Query Commands” on page 17.

5. Select a command to continue or end the current query.
6. Indicate if records should be appended to an existing CSV file.
   - When this check box is selected, the records that match the specified selection criteria are added to the bottom of the last set of records you extracted. You can use this to build a master list based on several different queries.
   - When this check box is not selected, a new CSV file is created. If you have not loaded the previously extracted values into QAD CSS, they are lost. Use this for a new query or when you want to discard the results of a query because they are not what you expected.

   Note If you want to maintain individual query results, save the files in a work area—using the CSV format—with unique names before executing a new query.
7. Click Extract Records. The system extracts records based on the query you have created and displays them in an Excel spreadsheet named `Customers.csv`.
8. Save this spreadsheet with a unique name to a local drive or your network file share. If you are working with multiple files, include a data and time stamp to ensure file uniqueness, such as `WestRegionCusomers092004.csv`.

Note If you execute multiple queries and append the data, the results may include duplicate records. You should sort the data by customer ID and ensure there are no duplicates before loading. When duplicates exist, the values from the last record loaded will apply if the load is done with overwrite update; otherwise, errors will result from the duplicate records.

View and Update Extracted Data

1. Review the data that has been extracted from QAD EA and ensure that the records you expected have been retrieved. If not, you can modify the query and extract data again. If necessary, you can manually remove unneeded records or add ones that are required.

   If you have appended the results of multiple queries to one file, ensure that you do not have duplicate records before continuing.

See “Planning Additional Customer Data” on page 19.

2 After reviewing the records and ensuring you have the ones you want, add the additional data used in QAD CSS as described in the planning section.

Important The load function depends on the spreadsheet columns being in an expected sequence. While you can add data to the spreadsheet, do not delete columns or modify the column order.

Important Date format should be mm/dd/yy. If the date format changes after extraction due to your regional settings, you need to change related fields back to mm/dd/yy using the Format Cells function in Excel. For information on how to use the Format Cells function, refer to the Excel documentation.

3 Save your changes and return to the Customer Load function in preparation for the next step.

Load Customer Data into QAD CSS

After you have set up the data, you can load it into QAD CSS.

1 First locate the file you updated by using the Browse button or by entering the directory location.

2 Before loading, determine if you want to modify existing customer information.

- When Overwrite Existing Records is selected, any records that already exist in QAD CSS are replaced during the load.
- When Overwrite Existing Records is not selected, an error is generated for any records that already exist.

Note All fields in the record are replaced by the current values in the spreadsheet. If a value exists for a field in QAD CSS and a blank value exists in the spreadsheet, the final record in QAD CSS will have a blank value.

3 Click Load Records into QAD CSS to begin the load. Before updating the QAD CSS database, the system copies the file to be loaded to the working area on the server.

Review Logs and Correct Errors

The load process creates three files on the server:

- `customers.csv` contains the records exported from QAD EA.
- `customersuccess.csv` contains the records last loaded successfully into QAD CSS.
- `customererror.csv` contains the records that failed during the last load into QAD CSS.

These three files should be considered temporary. The `customers.csv` file is either overwritten or appended to, depending on your selection during the load. The error and success files are always overwritten during the next load.

Note You should institute procedures for backing up and managing the files you save locally and update with additional QAD CSS information.

Use the Successfully Loaded link to view the `customersuccess.csv` file—displayed with Microsoft Excel—that contains all the records successfully added or updated in QAD CSS. You should save this file in an archive directory to maintain an audit trail of the updates.

Use the Failed Records link to view the records that were not loaded (`customererror.csv`). The last data column indicates the reason for the failure.

You can save this file in a work area and correct the data that caused errors. Then use Catalog Load to reprocess the corrected records. You do not need to remove the error information written in the last column; it is ignored by the load.

Important Save the file with a CSV format. Do not save it as an Excel workbook, or the load function will not be able to use it.

You should store copies of the success and error files with meaningful names on a local drive or accessible file share. These files may be useful for auditing at a later time. You should ensure that procedures are in place to back up the files.

Creating an Item Catalog

Before loading item data into QAD CSS, carefully plan this activity.

- Determine the QAD EA domains that you plan to interact with.
- Determine which items in QAD EA you plan to sell through your Web order-entry system.
- Determine how you want items to be grouped for display in the catalog. This determines the categories to be associated with items.
- Determine whether items are available to all customers or you want to create customer-specific views of the catalog.
- Collect images of items to be displayed on the Web.
- Determine how you want to use the other item attributes that can be defined in QAD CSS.

To complete the process of updating item data in QAD CSS with those in QAD EA, use the Catalog Load function located on Administration Menu|System Control Menu in QAD CSS. You can also use this function to delete a catalog and reload an entirely new one.

Note QAD CSS includes a Customer Item Maintenance function where you can create items and modify associated data elements. However, this is better suited for day-to-day minor modifications, rather than initial setup activities. You should always consider QAD EA as the primary source of item information.

The load function creates and uses files in comma-separated values (CSV) format. When you execute the load functions, make sure that Microsoft Excel is installed and available on the local computer. Microsoft Excel can then read and manage files in CSV format.

The CSV files are created in a work area on the server defined during installation in the WebSpeed startup file, `ubroker.properties`, as the fileUploadDirectory. Since users executing load functions possibly have not updated access to this directory, it is recommended that the CSV files be saved locally.

Catalog Load leads you through a series of steps:

1 First prepare QAD EA records for import into QAD CSS.

   a Choose the domain with records you want to import.

   b Choose item records you need for the Web by entering selection criteria to pinpoint the exact records you want to extract from QAD EA.

   c Then extract these records from QAD EA. The system displays them in an Excel spreadsheet.

   d Save this spreadsheet in a work area so that you can add additional information.

   Note This step is necessary since you may not have access to the directory on the server where QAD CSS is installed.

   e Update the additional columns in the spreadsheet with data to be used in QAD CSS.

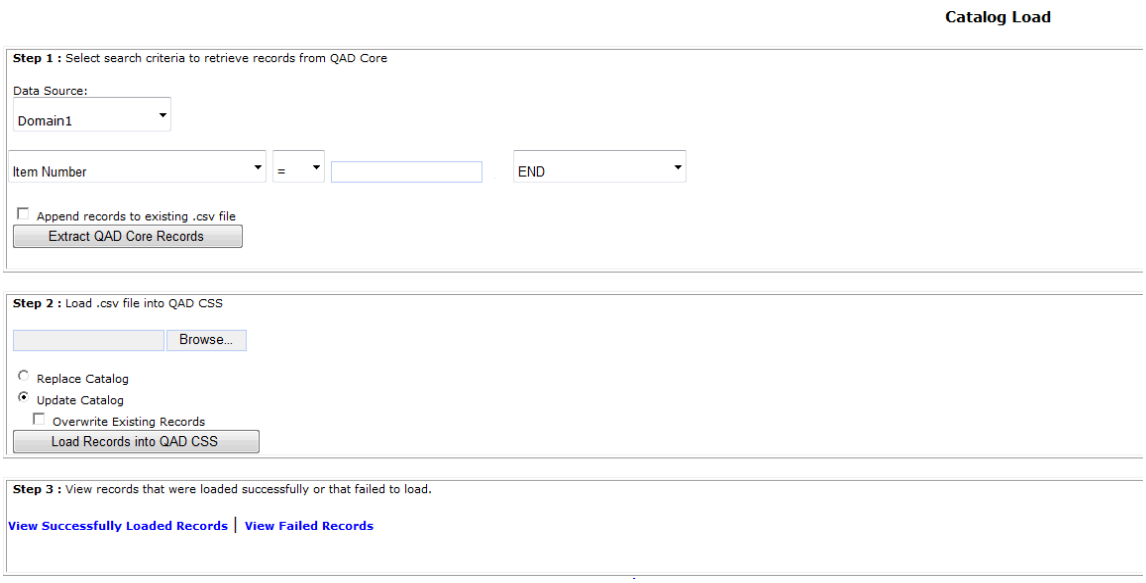
2 You then load this data into QAD CSS, creating or updating item records and their associated categories. This step creates two log files detailing records successfully loaded as well as those causing errors.

3 The final step is to review the log files and resolve any problems with records that did not load.

Important The load function depends on the spreadsheet columns being in an expected sequence. While you can add data to the spreadsheet, do not delete columns or modify the column order. Also the file must be saved in CSV format, not as an Excel document.

Figure 2.3 illustrates the Catalog Load function.

Fig. 2.3
Catalog Load



The following sections discuss each step in this function separately, beginning with the planning activity.

Designing Item Queries

You probably do not want all items defined in your QAD EA to display in your QAD CSS catalog. For example, you may only sell finished goods. Even if you also sell replacement parts, these items are probably a small subset of all the items included in the bill of material for a finished good.

In addition, you may only want to market items on the Web from selected product lines. For example, you may have one product line for consumer products and one for OEM products. Only the consumer products would be available for ordering from the Web.

You need to analyze your items, usually together with your marketing department, and determine which items to include in the QAD CSS catalog. You then need to look at how your items are defined in QAD EA and determine the best ways to group them using item master fields such as:

Product line (pt_prod_line). This is a required field used for grouping items for planning and reporting.

Promo Group (pt_promo). This field is for reference and can be used as needed.

Item Type (pt_type). This is an optional generalized code used to subdivide product lines or create categories that cross product lines.

Item Group (pt_group). This is an optional generalized code used to subdivide product lines or create categories that cross product lines.

Item Status (pt_status). Status codes are defined in QAD EA using Item Status Code Maintenance (1.1.5) and identify the engineering status of an item. If you have defined a code identifying inactive items, you can use it to exclude items with this status from the search results.

The Catalog Load function lets you select items by item number, customer item number, customer number, product line, item type, status, site, group, promotion group, division, and date added. These fields exist in two separate tables in QAD EA: item master (pt_mstr) and customer item master (cp_mstr).

Note The promotion group and division fields are for reference and can be used as needed.

You should consider performance when specifying selection criteria. Searching on fields that are included as part of a database index improves performance. In the item master, item number, group, and type are indexed. In the customer item master, customer item number and customer number are indexed.

When you design queries, you should also consider the relationship between data in the item master and customer item master.

- If you do not include either the customer item number or customer number in a query, only data from pt_mstr is returned. No data from the customer item table is returned, even if it exists.

- If you do include the customer item number or customer number, these criteria limit the data returned from pt_mstr. For example, if you specify customer 9000001 and item type FG, the query returns only items in pt_mstr that also exist in cp_mstr. Starting with that set of records, it then applies the next condition and returns those with a type of FG.

This means that you may need to do several separate queries to find the exact list of items you want. For example, if you want all items with numbers greater than 9 from both tables, you are required to execute two separate queries. You can use the append feature to combine the results of the two queries.

You should review your item data in QAD EA and decide upon the selection criteria you want to use before using the Catalog Load function. Use functions such as Item Master Report (1.5.1) and Item Data Report (1.5.2) to review the data.

The Date Added field is important for continuing synchronization with QAD EA. You should note the date that you initially populate your QAD CSS database. Later, you can select items by date added to retrieve only new records that need to be loaded.

Important There is currently no way to track records that are modified. You are required to establish internal procedures to manage changes that affect item records. But since the number of data attributes shared between QAD CSS and QAD EA is small, this should not be a frequent issue.

For details on how to use the query building features of Catalog Load, review the information in Customer Load. The way queries are built in the two functions is exactly the same. See the following topics:

- “Query Operators” on page 17
- “Query Commands” on page 17
- “Understanding Grouping” on page 18

Planning the Catalog Organization

In the spreadsheet, you can specify values for the additional fields in the QAD CSS item table (wpro_cust_item). Of special importance are the five code and code description fields. These correspond to the categories used to group items for display in the catalog. The values you specify will be created in both wpro_cust_item and the item category table (wpro_item_types). You should carefully consider how you want your items organized before updating the spreadsheet.

Item categories represent a hierarchical way of selecting items of interest. For example, a company that sells clothing might have categories like the following:

- Category 1 Sportswear
- Category 2 Women’s
- Category 3 Outerwear
- Category 4 Jackets

The number of categories you have and how you group the items requires input from your marketing department.

See “Defining Categories” on page 96.

Because the item type (category) values are created during the load process, you do not need to create them manually in Item Types Maintenance in QAD CSS. The load creates a separate record for each combination of item number and code number. However, you may need to add additional information, such as images.

Example You have a three-level catalog structure (code 0, 1, and 2). A record must be created for Item+Code 0, Item+Code1, and Item+Code2. Since this is time consuming to do manually, the records are created by loading the items with the required information.

Planning Item Images

Images are another important aspect of catalog creation. Up to four sets of images can be associated with an item:

See “itemDetailPgm” on page 74.

- Detail images display on the Item Detail page when users click a detail hyperlink and the system registry setting *itemDetailPgm* is set to display a page (`..op/op_itemdetail.html`). Any PDF files or schematics defined for the item also display on this page.

See page 79.

  Note To display images, the *showDetailImage* registry setting must be Yes.

- Pop images display in a pop-up window when users click a detail hyperlink and the system registry setting *itemDetailPgm* is set to display pop-ups (`..op/op_itemimage.html`).
- Thumbnail images display to the left of the item description in the catalog when Show item images is selected.

See page 74.

- You can display one or more icons below the item description in the catalog based on the registry setting *showLegendBar*. When this is Yes, the system checks the value of Icon List for the item before it displays the catalog. If an icon list is associated with the item, the icons are displayed and a legend appears in the top part of the screen listing the icons and their names as defined in Icon Maintenance.

See “Order-Entry Types” on page 62.

Note You can also associate images with each category level used to group items in the catalog using Item Types Maintenance. These images are used only with order entry 2.

For each image, you specify an image name and location, image height and width, and text that the system displays when the image cannot be found or when the user’s cursor passes over the image.

Image Location

The system looks for all images in the directory defined by the *images* system registry value. This directory can also be updated using the Image Path field in System Control Table Maintenance.

To make it easy to group images, you can create subfolders in the images directory. Then specify the subfolder name and image name in the appropriate fields.

Image Names

Since you may have many images, you should adopt a naming convention for your images that makes it easy to identify them. The simplest approach is to use the item number as part of the name and a code that indicates whether the image is for details, pop-ups, or thumbnails.

Example You could name the images for item 4145 as follows: `Item4145_t.gif` for a thumbnail, `Item4145_p.gif` for a pop-up, and `Item4145_d.gif` for a detail image.

Image Size

You should always specify the image height and width to optimize the display performance of the Web site in all Web browsers.

Planning Additional Item Data

The fields listed in Table 2.2 are extracted from the item master table and customer item master table in QAD EA and loaded into the Excel spreadsheet in columns labeled with the corresponding field from the QAD CSS item table wpro_cust_item.

Table 2.2
Extracted Item Fields

Master Table	Field in Master Table	QAD CSS Field in wpro_cust_item	Description
pt_mstr	pt_part	item_number	Item Number
pt_mstr	pt_desc1	item_description[1]	Item Description
pt_mstr	pt_desc2	item_description[2]	Item Description
N/A	N/A	item_long_desc	Marketing Description
pt_mstr	pt_um	um	Unit of Measure
pt_mstr	pt_cfg_type	configured	You can use the Configured field in the CSV file to control whether to select options for a configured item. • When the Configured field in the CSV file is set to No or False, the system uses mandatory default options for the configured item and saves your effort to configure the item. • If you want feature options other than the mandatory default options, leave the Configured field blank or specify any value except No or False. Then you can configure the item in the shopping cart.
cp_mstr	cp_cust_part	cust_part_number	Customer Part Number
cp_mstr	cp_cust	customer_number	Customer

Only an item number is required to create an item in QAD CSS. However, you should supply values for the fields listed in Table 2.3 in the Excel spreadsheet as required for your business model in order to avoid manual updates later. Some of this information displays in the catalog and some of it displays in the item detail page.

Table 2.3
User-Supplied Item Fields

QAD CSS Field Name	Label	Format	Description
N/A	Delete (Y/N)	x(1)	Indicates whether to delete the item record from the CSS system. Y: Delete the item record from the CSS system. N or blank: Leave the record as is.
code0 – code5	Type	x(28)	The category names with 0 (zero) being the top-most down the hierarchy to 5. This updates the field in the wpro_cust_item table and creates a record in wpro_item_types if it does not already exist.
cust_item_list	Item List	Logical	No special processing is currently associated with this field. If you enter Yes, you can sort the customer item view based on this field and see all the items with Yes grouped together. But currently, this feature does not extend to the catalog.
cust_part	Customer Part	x(16)	The ID that the customer uses to refer to your internal part number. This is mapped from cp_mstr.cp_cust_part in QAD EA. When specified, buyers can enter a customer part number and the system finds the correct internal item number for it.
customer_number	Customer	x(8)	The customer associated with this item in QAD CSS. This is mapped from cp_mstr.cp_cust in QAD EA.
detail_image	Detail Image	x(40)	The relative path and name of the item detail image file displayed on the QAD CSS item detail page when *itemDetailPgm* is set to display `op_itemdetail.html` for a new HTML page.
detail_image_alttext	Alt Text	x(40)	The alternate text displayed in rollovers or when the image cannot be displayed.
detail_image_height	Detail Height	->,>>>,>>9	Image height in pixels.
detail_image_width	Detail Width	->,>>>,>>9	Image width in pixels.

Table 2.3 — (Page 1 of 5)

QAD CSS Field Name	Label	Format	Description
ex_char1 – 5	EX Characters 1–5	x(8)	User-defined fields for character values. ex_char1 and exchar2 can be displayed in the catalog using Other 1 and Other 2 in Item Layout Maintenance.
ex_dec1 – 3	EX Decimals 1–3	->>,>>9.99	User-defined fields for decimal values. ex_dec1 can be displayed in the catalog using Other 3 in Item Layout Maintenance.
ex_int1 – 3	EX Integers 1–3	->,>>>,>>9	User-defined fields for integer values. ex_int1 can be displayed in the catalog using Other 4 in Item Layout Maintenance.
icon_list	Icon List	x(40)	A comma-delimited list of icon names defined in Icon Maintenance that display below the item description in the item catalog. The registry setting *showLegendBar* must be Yes to display the icon descriptions.
item_description	Description	x(24)	Text description of the item. Mapped from pt_mstr.pt_desc1 and pt_desc2 in QAD EA. The two fields are stored in separate arrays in the QAD CSS field.
item_market_desc	Marketing Description	X(5000)	Long text description of the item.
item_number	Item Number	x(24)	Unique ID of this item; must be the same as pt_mstr.pt_part.
maxQty	Maximum	->>,>>9.99	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.
minQty	Minimum	->>,>>9.99	The 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.
multQty	Multiple	->>,>>9.99	Enter the multiple for placing orders for this item. The 0 (zero) indicates no order multiple. This field is checked when items are added to the shopping cart.

Table 2.3 — (Page 2 of 5)

QAD CSS Field Name	Label	Format	Description
other_fields	Other Fields 1–15	x(8)	User-defined fields for text strings. Two of these provide information displayed on the item detail page: other_fields[4]: Quantity Requested other_fields[15]: Package Size See “Item Detail Page” on page 79 for additional information.
pdf_file	PDF File	x(28)	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), such as a data sheet, marketing brochure, or technical specifications. It can also be an HTML file, `.wav` file, or any other Web-compatible format. This file display when *itemDetailPgm* is set to display `op_itemdetail.html`.
pop_image	Pop Image	x(40)	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.
pop_image_alttext	Alt Text	x(40)	The alternate text displayed in rollovers or when the image cannot be displayed.
pop_image_height	Detail Height	->,>>>,>>9	Image height in pixels.
pop_image_width	Detail Width	->,>>>,>>9	Image width in pixels.
price_division	Pricing Division	x(8)	The pricing division used for integration with Trade Management. Reserved for future use.
price_group	Pricing Group	x(8)	The pricing group used for integration with Trade Management. Reserved for future use.
price_list	Price List	x(20)	A price list to be considered by the pricing calculation logic in QAD EA. Corresponds to a manual price list entered in Sales Order Maintenance (7.1.1).

Table 2.3 — (Page 3 of 5)

QAD CSS Field Name	Label	Format	Description
schematic_file	Schematic File	x(28)	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`.
search_field		x(8)	Normally this field should be left blank. By default, the items will be searchable based on the item number, descriptions, and categories. If you do not want that to happen, then enter the values that you want the items to be searchable on from the OE1 or OE2 search function.
searchItem	Search Item	Logical	Specifies whether to include this item when a keyword search is performed. By default, all items are searchable from the OE1 or OE2 page. Set this field to No if you do not want users to search for this item.
sort_name	Sort Name	x(12)	An additional field that can be used to sort items in a custom order. To do this, use the system registry field *showSortBy*. This field can also display on the catalog based on settings in Item Layout Maintenance.
thumb_image	Thumb Image	x(24)	Relative path and name of the image file displayed on the catalog page next to the item description when Show item images is selected.
thumb_image_alttext	Alt Text	x(40)	The alternate text displayed in rollovers or when the image cannot be displayed.
thumb_image_height	Thumb Height	->,>>>,>>9	Image height in pixels.
thumb_image_width	Thumb Width	->,>>>,>>9	Image width in pixels.
totQty			The quantity available for ordering at all sites defined in QAD EA.
type0–type5	Description	x(40)	The descriptions of the categories that display in the catalog. Descriptions must be unique. This is stored in the wpro_item_types table, not wpro_cust_item.

Table 2.3 — (Page 4 of 5)

QAD CSS Field Name	Label	Format	Description
um	Unit of Measure	x(2)	The stocking unit of measure for this item. If not specified in QAD CSS, defaults to ea (each). Mapped from pt_mstr.pt_um.
whsQty	Quantity	->>,>>9.99	The quantity available for ordering at the default site defined in QAD EA.
wpro_lang	Language	x(30)	Indicates the language being used for descriptions associated with the item. When this is blank during load, the default CSS language is used (eng). If a language is specified, it is used. This supports creating specific item/customer combinations with different languages if needed.
configurable	Configurable	Logical	Indicates whether the item is configurable. • Yes: The item is configurable. • No or blank: The item is not configurable.

Table 2.3 — (Page 5 of 5)

Prepare Item Records to Load

Use the Catalog Load function on the QAD CSS Administrative menu to execute these functions.

Before executing the load, make sure the following data is defined in QAD CSS:

- Any languages referenced if you are not using the default English language
- Customer records for item/customer associations

Select Records to Extract from QAD EA

To extract the data you need:

1. Choose the domain containing the items you want to load.
2. Enter the item attribute to use for selecting records in the first query field. The choices are item number, customer item number, customer number, product line, item type, status, site, group, promotion group, division, and date added.

See “Query Operators” on page 17.

3. Choose an operator from the list: =, <>, <, <=, >, >=
4. Enter the value you want to match on, such as type = FG. You determine these values from QAD EA, since your input is not validated on the Catalog Load screen.

See “Query Commands” on page 17.

5. Select a command to continue or end the current query.

6 Indicate if records should be appended to an existing spreadsheet.

- When this check box is selected, the records that match the specified selection criteria are added to the bottom of the last set of records you extracted. You can use this to build a master list based on several different queries.
- When this check box is not selected, a new CSV file is created. If you have not loaded the previously extracted values into QAD CSS, they are overwritten. Use this for a new query or when you want to discard the results of a query because they are not what you expected.

Note If you want to maintain the query results, save the files—in CSV format—in a work area with unique names before executing a new query.

7 Click Extract Records. The system extracts records based on the query you have created and displays them in an Excel spreadsheet named `Items.cvs`.

8 Save this spreadsheet with a unique name to a local drive or your network file share. If you are working with multiple files, include a date and time stamp to ensure file uniqueness, such as `FGTypeItems92004.cvs`.

Note If you execute multiple queries and append the data, the results may include duplicate records. You should sort the data by item ID and ensure there are no duplicates before loading. When duplicates exist, the values from the last record loaded will apply if the load is done with overwrite enabled; otherwise, errors will result from the duplicate records.

View and Update Extracted Data

1 Review the data that has been extracted from QAD EA and ensure that the records you expected have been retrieved. If not, you can modify the query and extract data again. If necessary, you can manually remove unneeded records or add ones that are required.

If you have appended the results of multiple queries to one file, ensure that you do not have duplicate records before continuing.

See “Planning Additional Item Data” on page 27.

2 After reviewing the records and ensuring you have the ones you want, add the additional data used in QAD CSS as described in the item planning section.

Important The load function depends on the spreadsheet columns being in an expected sequence. While you can add data to the spreadsheet, do not delete columns or modify the column order.

3 Save your changes and return to the Catalog Load function in preparation for the next step.

Load Item Data into QAD CSS

After you have set up the data, you can load it into QAD CSS.

1 Locate the file that you updated by using the Browse button or by entering the directory location.

2 Select Replace Catalog or Update Catalog. The default option is Update Catalog.

- Select the Replace Catalog radio button if you want to replace your current catalog with a new one. When this option is selected, all items and categories are removed from the QAD CSS database and the records in the CSV file are added. This option can be useful during implementation if you determine that the current way the catalog is organized is not adequate. You can start over with a clean database.
- Select the Update Catalog radio button if you want to modify the existing catalog.
  - When Overwrite Existing Records is not selected, new records are added (if any) and records that are marked as Delete in the CSV file are deleted.
  - When Overwrite Existing Records is selected, new records are added (if any), records that are marked as Delete in the CSV file are deleted, and existing records are replaced.

3 Click Load Records into QAD CSS to begin the load. Before updating the QAD CSS database, the system copies the file to be loaded to the work area on the server.

Review Logs and Correct Errors

The load process creates three files on the server:

- `items.csv` contains the records exported from QAD EA.
- `itemssuccess.csv` contains the records last loaded successfully into QAD CSS.
- `itemserror.csv` contains the records that failed during the last load into QAD CSS.

These three files should be considered temporary. The `items.csv` file is either overwritten or appended to, depending on your selection during the load. The error and success files are always overwritten during the next load.

Note You should institute procedures for backing up and managing the files you save locally and update with additional QAD CSS information.

Use the Successfully Loaded link to view the `itemssuccess.csv` file—displayed with Microsoft Excel—that contains all the records successfully added or updated in QAD CSS. You should save this file in an archive directory to maintain an audit trail of the updates.

Use the Failed Records link to view the records that were not loaded in `itemserror.csv`. The last data column indicates the reason for the failure.

You can save this file to a work area and correct the data that caused errors. Then use Catalog Load to reprocess the corrected records. You do not need to remove the error data written in the last column; it is ignored by the load.

Important Save the file with a CSV format. Do not save it as an Excel workbook, or the load function will not be able to use it.

You should store copies of the success and error files with meaningful names on a local drive or accessible file share. These files may be useful for auditing at a later time. You should ensure that procedures are in place to back up the files.

Chapter 3

Users and Security

This chapter provides details about setting up users and implementing security in QAD CSS.

Overview of Users and Security 36
Describes the relationship between users and security.

Setting Up Security Groups 36
Explains how to use Security Group Maintenance to define security groups.

Managing Users 37
Explains how to create users in user maintenance, create users through online user registration, addresses guest users, personal administration, and manage user sessions.

Assigning Functions to Users 39
Explains how to assign menu bar buttons and assign menus.

CSS Login 42
Discusses login registry settings.

Overview of Users and Security

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

See “Set Up the B2C User in QAD CSS” on page 119.

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. In this case, access is managed in the background through a special B2C account.

This chapter discusses general information about setting up users and security in the context of a B2B implementation. Specific information for B2C implementations is included in Chapter 6, “B2C Order Processing”, on page 113.

You can set up the site so that users can request a login by registering. The information they submit can then be reviewed and approved before the account is created.

To delegate managing the details of user administration, you can set up primary users and define them as external administrators for other users.

Example One of your customers has a buying group of ten buyers. You set up a primary buyer and let this user manage the other user accounts for the customer.

This approach relieves your organization of the day-to-day details of user administration. However, it is only suitable if you have long-term, trusted relationships with your customers.

Setting Up Security Groups

Use Security Group Maintenance to define security groups that determine what functions are available to users. Associate security groups with:

- Menu buttons
- Menus
- Users

When a function is not assigned to a user’s security group, the menu button or link does not display on their screen.

See “Using Registry Settings to Customize Your Web Site” on page 6.

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.

Before defining security groups, consider how you want to divide 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.

Managing Users

Creating Users in User Maintenance

Use User Maintenance to create users and associate them with already defined customers. You specify user information such as e-mail, phone, and language. You also define passwords and determine if users must change their passwords the next time they log in. You can also disable accounts when needed.

You then associate the user with a customer or all customers in a security group. User currency is also defined per customer.

Note You are also required to choose the domain that a user is associated with. Valid domains are defined in Data Source Maintenance.

Each user can have an individual start page that displays after successful login. This is typically set to `lg/lg_index.html`, but you can change it to another page for specific users.

If you want to implement external administrators, you do this in User Maintenance. When you designate a user as an external administrator, you can then specify which users and security groups they can manage.

Example John Smith is the IT Manager of ABC Company. You want to let John change information for all of the users of ABC Company that are registered at your Web site. During setup, you indicate that John is an external administrator and associate the ABC Company customer number with him. Once this record is created, John can change data associated with all users associated with the ABC Company.

See “Setting Up E-Mail Events” on page 143.

Note During implementation, you can activate events that trigger e-mail to defined users. Any users to receive e-mail messages must be defined in User Maintenance with a valid e-mail address, even if you do not expect them to actively use the system.

Creating Users Through Online User Registration

In a B2B scenario, you deal with long-term customers. However, you may still want to have a way to allow new users to request access through your Web site. You can do this by supplying an online registration form that potential buyers can submit for review.

QAD CSS supplies this online registration form from the Register Online menu option (`lg\lg_registeronlinestart`).

One registry setting affects this form. The value of *b2bURL* displays as the URL location that users can access after registration to view their account information. The *b2bURL* setting is also used during login to establish the home page to display.

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 stored in the database. You can review the request in User Registration. After validating the information, you can set up a new customer account in QAD EA if needed.

Important Make sure that you verify that the customer record exists in QAD EA before you can create the user.

To implement the online registration feature:

1. Define a default user in User Maintenance in QAD CSS to supply default information when the new user records are created.
2. Specify this user ID as the value for the *defaultCustomerRegistration* system registry key in System Registry Maintenance.

See “Setting Up E-Mail Events” on page 143.

3. Optionally enable e-mail notification so that you are alerted when a new registration form is submitted. Otherwise, you implement procedures to review User Registration on a regular basis.

Note You 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. This is a customization activity out of the scope of this guide.

When you review the registration request in User Registration you can:

- Reject this user request.
- Accept the request and create a new user record using the information supplied during registration in combination with the defaults associated with the *defaultCustomerRegistration* user ID.

Guest Users

Depending on your particular business requirements, you may have a highly secured B2C Web site or a more open one. If you want to attract new buyers by letting them browse your catalog but not offer them the ability to actually purchase items, you can implement this through security.

Create a security group such as Guest and then create a special Guest account in User Maintenance. Assign the Guest security group to the Guest user account. In Menu Maintenance, provide access to the catalog page. However, in Menu Button Maintenance, remove access to the Cart button and the Add button.

You can combine this with the User Registration form so that interested buyers can submit a request to be added to your system.

Personal Administration

Personal Administration lets users change passwords, secret questions, and e-mail addresses as often as they want. This prevents you from having to manage this activity.

You can set up your site so that the personal administration page displays when the user’s password has expired. By default, this page is:

```
ad/ad_adm_bcuserpersonal.html
```

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.

Managing User Sessions

When a user logs in to your Web site, the system assigns the user ID a unique session number. This session ID lets QAD CSS track and store information about the user's activities while in the site.

You can view these session records and related transactions using the administrative Session Maintenance function. If necessary, you can terminate active or abandoned sessions.

Session detail can be important in diagnosing and troubleshooting issues reported by users.You can determine the amount of detail retained in the system by the Keep Transaction Log field in System Control Table Maintenance.

Important If this field is enabled, be sure to monitor and purge the log regularly.

When logging is enabled, QAD CSS captures session information as users navigate the system, such as:

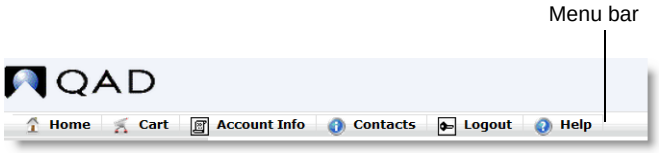
- Pages visited
- Duration of the visit on each page
- Page/form information
- HTML information passed from page to page

Assigning Functions to Users

Assigning Menu Bar Buttons

Use Menu Button Maintenance to set up and configure the QAD CSS menu bar displayed at the top of every page. You can create and apply appropriate security settings to each option as well as modify, delete, and reorder the menu options available. You can add your own entries if needed.

Fig. 3.1
QAD CSS Menu Bar



Assigning Security to Menu Buttons

Assign each security group that will have access to this function on the menu bar. Multiple groups can be assigned. Users assigned to selected security groups will see this option. Users not assigned to selected security groups will not see this option.

Modifying the Menu Bar

You can change the following attributes of the menu bar in Menu Button Maintenance:

- Text that displays on the button
- Image associated with the button and its size attributes
- Alt text that displays as a rollover or when the image is not available

- Order in which the buttons display

Adding New Menu Bar Options

To add an option to the menu bar, you are required to supply the following information:

- Name of the button to create
- Display text associated with the button
- URL or JavaScript action to execute when the button is clicked

You specify 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 form actions is not used (LaunchButton, ViewOrderButton, HelpButton, or Documentation), specify either of the following:

- 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.

Assigning Menus

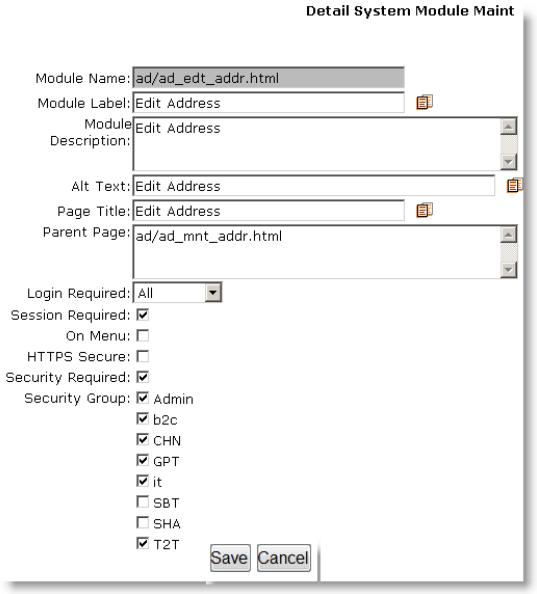
Use two functions to register pages that are part of QAD CSS and define and modify the menu system:

- System Module Maintenance
- Menu System Maintenance

Registering Pages

All HTML pages that are part of the QAD CSS system are registered in Administration Menu| System Control Menu|System Module Maintenance. You also use this program to indicate which pages can display on the menus and set page-level security parameters.

Fig. 3.2
System Module Maintenance



See “Setting Up Secure Processing” on page 127.

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.

You use System Module Maintenance to specify the parent page for the current program page and to indicate whether the current page is restricted by security group. Base system data is loaded during installation and typically does not need to be modified. You may need to use this function for new pages you add.

Parent Page. This field provides hierarchy information for the current page. 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).

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.

Customizing Menus

You use Menu Maintenance to edit and configure the QAD CSS navigational menu. 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.

Note Menu Maintenance only defines menu relationships. To define the relationships between parent and child program pages, you need to use System Module Maintenance.

See “Left Pane, Area 1” on page 66.

Menu Maintenance lets administrators create menu headers and hierarchies. Many other features of the menu system are determined by registry settings defined in System Registry Maintenance.

See “Setting Up Security Groups” on page 36.

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.

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.

When you change the menus, you are required to 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.

During system setup when you want to test changes immediately, you can choose to display menus in real time by setting the system registry field *genMenuInLine* to True. On a production site, this setting should be set to false so that the JavaScript file is used to ensure optimal system performance.

Reporting on Security Setup

Three reports on the Administration|Administration Report menu support the setup of security:

- Module Report includes information about whether a module requires access.
- Module Security Report lists security groups associated with secured modules.
- Module Hierarchy Report displays how pages in QAD CSS are related in parent-child relationships.

CSS Login

Single Sign-on (SSO)

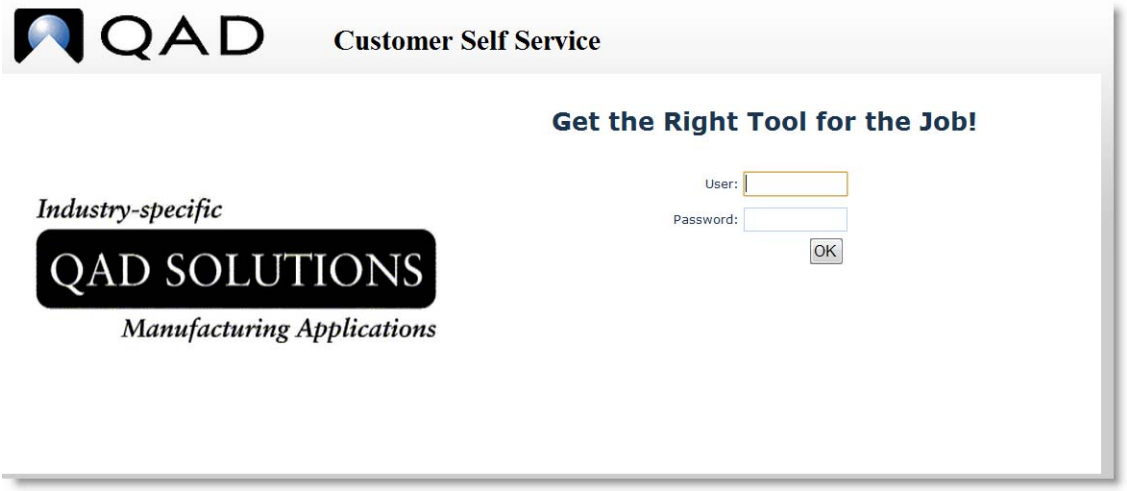
Using single sign-on (SSO), a user can log in once and gain access to all systems, including QAD CSS, without being prompted to log in again at each of them.

Note Make sure that you install an SAML extension; this extension contains a filter that intercepts requests to the CSS login.

In this way, time that would be spent re-entering passwords for the same identity is saved.

Login Registry Settings

Fig. 3.3
Login Registry Settings



When the system prompts the user for a password during login, the following registry settings affect the password:

See “Setting Up E-Mail Events” on page 143.

disableAccount. This setting determines what happens when the user 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 with *failLoginRetry.* When this field is Yes, a user can supply invalid login data three times before an account is disabled.

failLoginRetry. When Yes, the system checks *disableAccount* after three failed login attempts and disables the account if required.

minPasswordLength. This setting defines the minimum password length.

Several other registry settings are active during login also:

b2bURL. This setting is used during login to establish the home page to display.

defaultCountry. This setting establishes the default country to use in address records. You should ensure that this is a valid country code defined in QAD EA. The default country is used when creating new ship-to and bill-to address records in QAD EA.

In addition to these registry settings, settings in administrative functions affect login. In System Control Table Maintenance:

- Password Expiration determines how long a user can enter the same password before being prompted to change it.
- Session Limit determines whether a user can log in more than once with the same ID and password.

In User Maintenance:

- Force password change on next login requires users to change their passwords when they next access the system.
- Disable Account prevents a user from logging in.

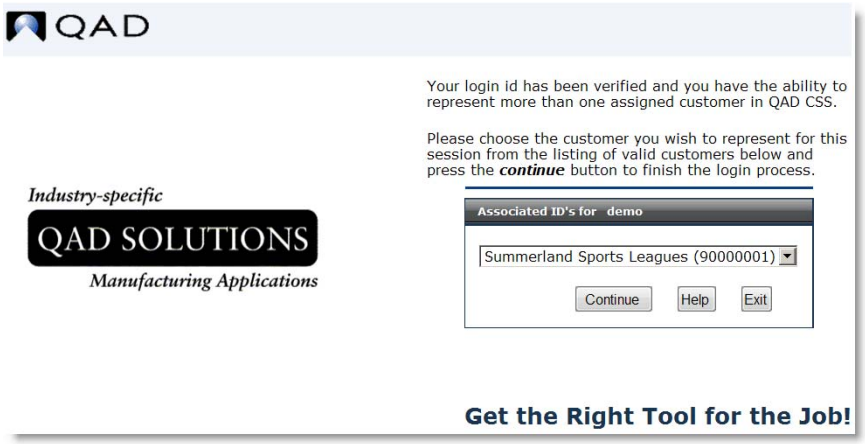
In Order Control Maintenance:

- Credit Notify on Startup determines if a message displays during login when the user's associated customer is on credit hold.

Associated Customers

When a user is associated with more than one customer, a screen appears during login so the user can select the customer for this session.

Fig. 3.4
Choose Customer During Login



The following registry settings affect this page:

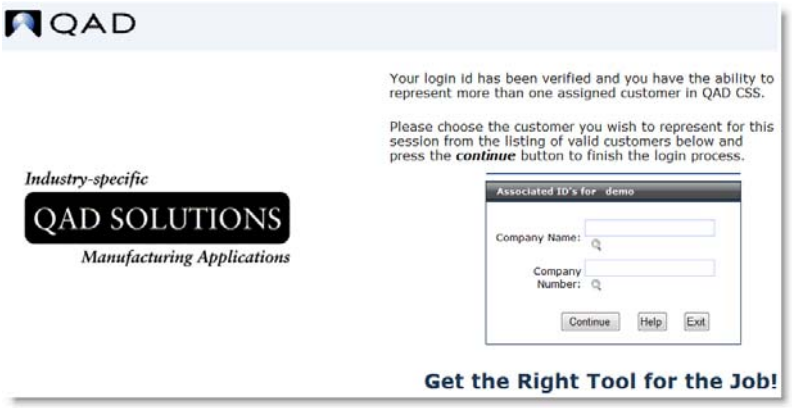
showAddLoginInfo. This setting determines how much information about the customer displays in the additional customer drop-down list.

- No: The list displays the customer name followed by the number in the format: Name (number).
- Yes: The customer name is followed by the city, state, and country; then the customer number. Figure 3.4 illustrates the list when *showAddloginInfo* is Yes.

custDisplayLimit. This setting determines how users select a customer during login when more than one customer is associated with them in User Maintenance. The default is 25.

- If the number of customer records associated with the user is less than the value you specify, a drop-down list appears so that the user can select the appropriate customer from the list (as in Figure 3.4).
- If the number of customer records associated with the user is greater than the value you specify, a screen appears with two lookups: one for customer and one for customer number. The user can choose which browse to use for selecting an associated company (as in Figure 3.5).

Fig. 3.5
Choose Customer During Login (with lookups)



Note When the login has only one customer association, the customer selection screen does not appear.

Chapter 4

Customizing Web Site Appearance

This chapter describes optional ways you can modify and tailor the appearance of the user interface of the Web site you build with QAD CSS.

Introduction 48
Discusses how CSS can be modified to fit a preexisting Web site.

Updating QAD CSS Style Sheets 48
Explains how to modify different aspects of style sheets with details on classes.

Updating Images 54
Explains how to set images through the registry and set images with admin functions.

Using Administrative Functions to Customize the UI 55
Explains how to create icons and change labels.

Customizing Help 57
Explains how to customize help systems based on different kind of help information.

Customization Best Practices 58
Provides best practices and guidelines to follow when you deal with custom programs.

Introduction

QAD CSS is designed so that it can be easily modified to fit into your corporate Web site. It uses standard Web technology, such as cascading style sheets, to control HTML page appearance.

This chapter provides details on modifying style sheets and images. It also includes other details on how the UI can be tailored using registry settings and other administrative functions.

Note Many other registry settings affect different aspects of the home page and the different order entry pages. For example, you use registry settings to determine the background color for the menu in the left pane of the home page. These registry settings and their effects are described in detail in Chapter 5.

Updating QAD CSS Style Sheets

Using style sheets lets Web designers have more control over page appearance by defining an order of precedence. It also makes maintenance of multiple pages easier, since one style sheet can control the appearance of many HTML pages.

The following table lists the style sheets that you can modify. They are initially in the *CSSInstallDir*\qadcss\styles directory.

Note During operation of the Web site, a system registry setting (*styles*) determines the location of style sheets. This value can also be modified by updating the Style Path field in System Control Table Maintenance.

Table 4.1
QAD CSS Style Sheets

File	Description
jquery-ui.css	This cascading style sheet contains class definitions for UI interactions and effects.
qad_style.css	This cascading style sheet contains class definitions used with Javascript menus and other class definitions for style. To be compatible with QAD CSS 5.2.3 or earlier versions, you can use qad_style_old.css.

Using qad_style.css

The qad_style.css file allows for flexible styling of the web pages. Style is specified for cascading style sheet selectors.

You can get your desired style by using either of the following selectors:

- Class
- HTML tag
- ID

For the Class selector, it is a class attribute of one or more elements. The Class selector is referenced in the cascading style sheet with a period.

Example You can define a warning class:

```
<p class="warning">This is a paragraph with a class="warning"</p>
```

Then you can define the warning background color using the Class selector:

```
.warning {background-color: #ffc;}
```

For the HTML tag selector, it is an HTML tag such as `h1` or `p`.

Example You define an HTML tag selector:

```
<p>Specific paragraph</p>
```

Then you can define color and font size using the selector as follows:

```
p {color: blue; font-size: 200%;}
```

For the ID selector, it is an ID attribute of a unique element, which is used once. It is referenced in the cascading style sheet with #.

Example You define an ID selector:

```
<div id="header">
<h1 id="site-title">sample <span id="ep4_7" class="e9p4">sample</span> title</h1>
<h2 id="site-description"> another <span id="ep4_6" class="e9p4">sample</span>
description</h2>
</div>
```

Then you can define color and font size using the selector as follows:

```
#site-title {font-size: 200%;}
#site-description {font-size: 100%; color: #ffc;}
```

Using qad_style_old.css

For QAD CSS 5.2.3 or earlier versions, you control web page style by using classes in the `qad_style_old.css` file:

- Style Sheet Classes for Home Page
- Style Sheet Classes for Order-Entry Pages

Style Sheet Classes for Home Page

You can modify classes used for the home page to ensure that the page fits seamlessly into your corporate Web site.

Figure 4.1 displays a sample home page. The numbers on the sample refer to the classes listed in Table 4.2. The associated class affects the area of the page where the number displays.

You can use this table to determine which classes must be changed to implement the modifications you want to make.

Important You can modify classes without adversely affecting the application. However, you should not add or delete classes.

Fig. 4.1
Home Page Classes

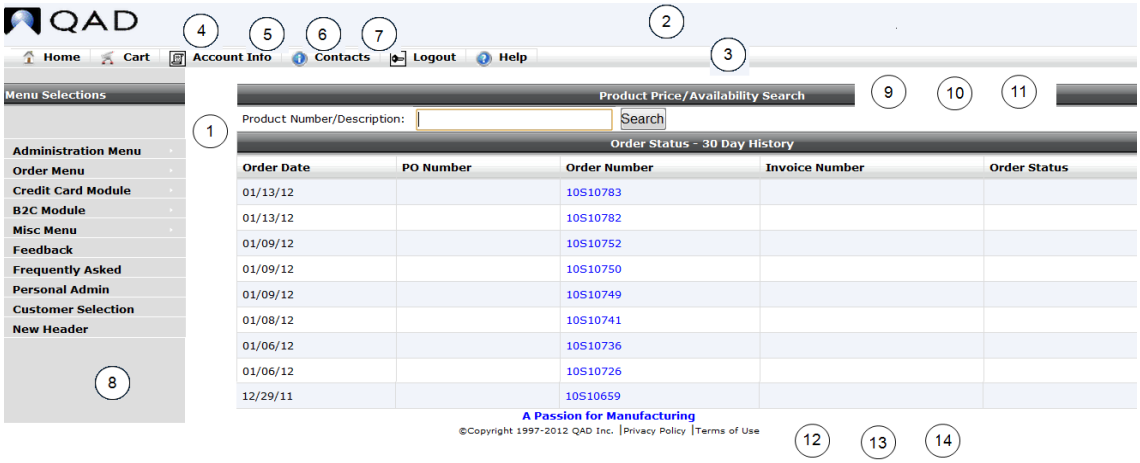


Table 4.2
Class Names

Ref. #	Class Name	Description
1	defaultBody	Sets the background color, foreground color, and font for the entire screen.
2	qadHeader	Sets the background color, foreground color, and font for the top banner that displays the company logo and product version number.
3	TABLE.clsNavTop	Sets the background color for the menu buttons such as Home, Cart, Account Info.
4	TD.clsBtnOff	Sets the background color, border color, and fonts for the menu buttons such as Home, Cart, Account Info.
5	TD.clsBtnUp	Sets the background color, border color, and fonts for the menu buttons (such as Home, Cart, Account Info) when the mouse is over the icon.
6	TD.clsBtnDown	Sets the background color, border color, and fonts for the menu buttons (such as Home, Cart, Account Info) when the button is clicked.
7	TD.clsBBarRaised	Sets the border color and padding for the bar that appears raised behind the menu buttons.
8	TD.clsSideBar	Sets the background color for the menu bar but not the menu items.
9	clsPlainListNoBorder	Sets the background color, foreground color, and font for the main headings such as Product Price/Availability Search, User Messages.
10	defaultText	Sets the background color, foreground color, and font for data entered by a user. For example, it controls the appearance of text that users enter in the Search box next to the Search button.
11	definedButton	Sets the background color, foreground color, and font for the Search button.

Ref. #	Class Name	Description
12	clsRaised	Sets the background color, foreground color, and font for the bottom of the screen. This is the area containing the copyright text defined in the system registry setting *hostCopyrightText*.
13	clsNavLinks	This lets you control the text appearance of a hyperlink so that it appears like normal text without underlining. This can be used for example, in the copyright text if your company tag line is also a hyperlink to your corporate Web site.
14	copyright	Sets the color and font for the copyright information.

Style Sheet Classes for Order-Entry Pages

You can also modify classes used for order-entry pages in QAD CSS.

See “Order-Entry Types” on page 62.

Figure 4.2 displays a sample order entry 1 page. The numbers on the sample refer to the classes listed in Table 4.3. The associated class affects the area of the page where the number displays.

Note In this graphic, only classes that are unique to this page are described. Other classes described in Table 4.2 also apply.

Fig. 4.2
Order Entry I Page

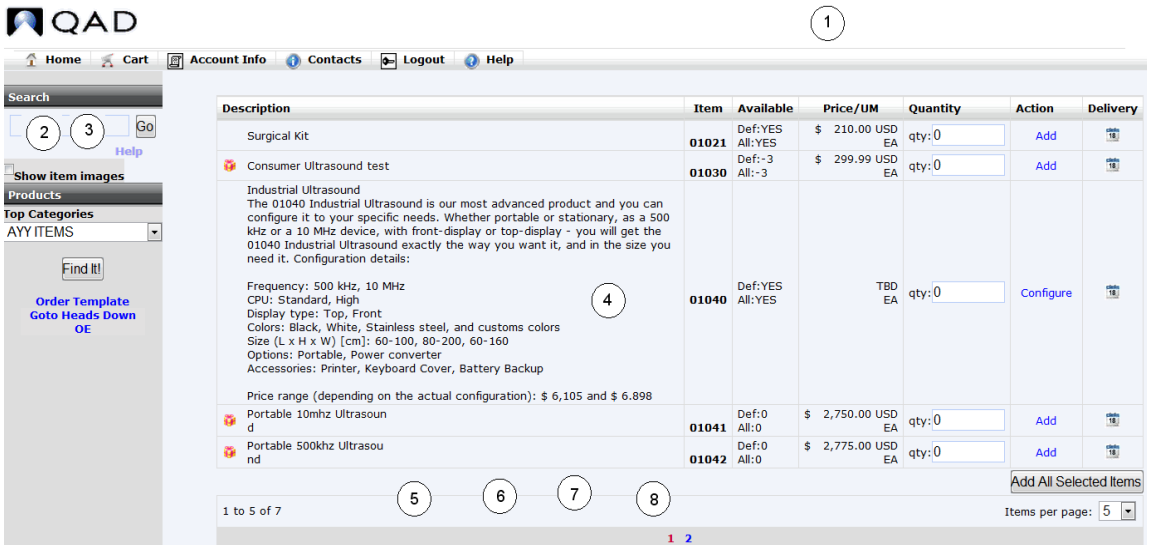


Table 4.3
Order Entry 1 Classes

Ref #	Class Name	Description
1	MessageWaitingText	Sets the font color, font family, and font size of the message waiting text.
2	boxHeader	Sets the color and font size for the search text.
3	clsFlat	Sets the background color for the search menu.
4	plainBorders	Sets the table border/outline color and size.

Ref #	Class Name	Description
5	clsPlainList	Sets the background color, font color, and font size for the cells in the table.
6	TD.clsLegendBar	Sets the background color, font color, and font size for the record count row; for example, 1 to 2 of 2.
7	clsPlainListLink	Sets the text color in the table when it is a hyperlink; for example, cells in the Item column.
8	buttonLinkCurrent	Sets the font color and size for the page numbers on the screen.

Figure 4.3 displays a sample order entry 2 page. The numbers on the sample refer to the classes listed in Table 4.4. The associated class affects the area of the page where the number displays.

Note In this graphic, only classes that are unique to this page are described. Other classes described in Table 4.2 also apply.

Fig. 4.3
Order Entry 2 Page

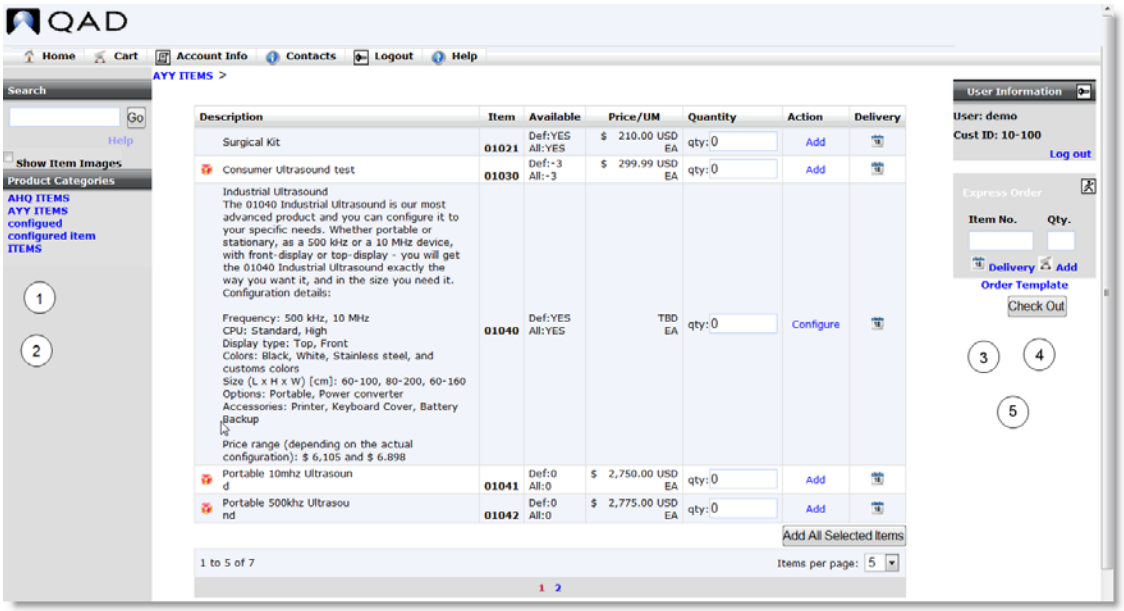


Table 4.4
Order Entry 2 Classes

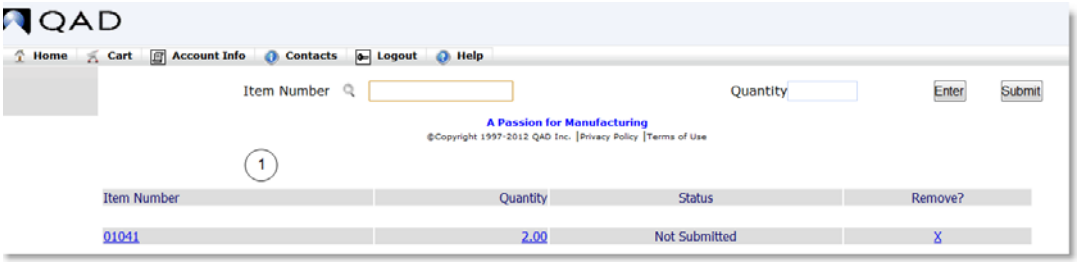
Ref #	Class Name	Description
1	clsItemSubType A.clsItemSubType A:link.clsItemSubType	Sets the font family, color, and size of the link.
	A:hover.clsItemSubType	Sets the font, color, and size when the mouse is over the link.
	A:visited.clsItemSubType	Sets the font, color, and size after the user has clicked the link once.
2	clsRightSideBar	Sets the background color, foreground color, and font for the right side of the screen. This is the area behind the User Info icon.

Ref #	Class Name	Description
3	clsFlat	Sets the background color, foreground color, and font for the User Info icon.
4	clsItemTopType	Sets the background color, foreground color, and font for the category links.
5	A.clsSideBar A:link.clsSideBar	Sets the font family, color, and size of the link.
	A:hover.clsSideBar	Sets the font, color, and size when the mouse is over the link.
	A:visited.clsSideBar	Sets the font, color, and size after the user has clicked the link once.

Figure 4.4 displays a sample order entry 3 page.

Note In this graphic, only classes that are unique to this page are described. Other classes described in Table 4.2 also apply.

Fig. 4.4
Order Entry 3 Page



In this screen, the background color for the lines (1) is hard coded to #DDDDDD.

Modifying Colors

In the style sheet, hexadecimal values represent the color of the element. You can use any color you want. Many different graphics programs—such as Adobe Photoshop—let you see the hexadecimal value of a color.

Other resources are available on the Web. One simple tool can be found here:

http://www.colourtohtml.tk/

Viewing Your Changes

After making modifications, follow these steps to view your changes:

- If you change a `.css` file, press F5 or Refresh in your browser to see the updates.
- If you change an `.html` file—for example, by changing a class name—compile the `.html` using the WebSpeed Workshop.

  For details on how to use WebSpeed Workshop, see *Installation Guide: QAD Customer Self Service*.
- If you make changes to a file in the `lib` directory—for example, to change the class name across the application—you must restart the WebSpeed broker.

Updating Images

The images that display on the home page and other application pages provide a key way of branding the site for your company as well as communicating information about what you sell. This section contains information about how to modify images.

- You can define the image directory in the `qad_style.css` file.
- Or, you can set images through the system registry. The system looks for all images in the directory defined in the system registry. The directory can also be updated using the Image Path field in System Control Table Maintenance.
- Some UI images can also be defined with administrative functions.

Setting Images Through Cascading Style Sheet

You can define the image directory in the `qad_style.css` file.

Example You can define the image directory to include the magnifying glass image and the lookup icon.

```
.magnifying_glass{
background-image:url("../images/magnifying_glass.gif");
background-repeat:no-repeat;
width:20px;
height:20px;
display:inline-block;}

.lookup_icon{
background-image:url("../images/lookup_icon.gif");
background-repeat:no-repeat;
width:16px;
height:16px;
display:inline-block;
vertical-align:top;
/*margin:auto 0 auto 3px;*/
cursor:pointer;}
```

Setting Images Through the Registry

Appendix A,“System Registry Fields”, on page 169 lists all registry settings. You should review these settings carefully, since they let you control many aspects of the UI, from the sizing of graphics to what displays on order-entry pages.

When you use registry settings to modify the UI, you can define elements of the UI that vary for each user, customer, security group, marketing group, and customer group.

A number of system registry settings affect what image files display:

compLogoName. 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.

compLogoHref. Use this setting to define a URL associated with the company logo defined by the *compLogoName* setting.

page 54partslookuplogo. This setting determines the name of the image file displayed on order entry 1 page prior to the execution of search. By default, this is `parts_look.gif`.

reportFooterLogo. This setting specifies the name of the image file displayed at the bottom of reports. If left blank, the `host_logo.gif` is used; this image is always used on the header.

Setting Images with Admin Functions

See “Planning Item Images” on page 26.

Item images are associated with items and can be specified during the Catalog load. Other images on the UI are defined with various administrative functions.

- Use Icon Maintenance to define icons and optionally associated actions with them. Icons can be associated with items in Customer Item Maintenance and display in the catalog when the registry setting *showLegendBar* is Yes. 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.
- You can associate images with contacts in Contact Maintenance. You can use this feature to display pictures of your customer service representatives or other types of pictures on this page.
- If you use order entry 2, you can associate images with the product category heading and each subcategory used to group your items in the catalog. You create this association using Item Types Maintenance.
- You associate images with the QAD CSS menu folders using Menu Button Maintenance. You can use this function to modify the images used for the shopping cart, home, contact, help, account information, and logout.
- You can associate images with items featured on a promotion using Specials Maintenance.

Using Administrative Functions to Customize the UI

Many administrative functions affect the appearance of the UI. Some functions address welcome messages that display on the home page. These are discussed in Chapter 7,“Contacts and Messages”, on page 141.

In System Control Table Maintenance, you determine whether the database description displays in the header of QAD CSS screens.

Other administrative functions that deal specifically with UI issues are:

- Icon Maintenance sets the graphic images used to pass information to the end user through visual cues.

- 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.

Note Menu Button Maintenance and Menu Maintenance are discussed in Chapter 3,“Users and Security”, on page 35, since what displays is based on the user’s security group.

In addition, you can use functions on the Administration|Language Menu to modify field labels. While the language functions are intended primarily to support the use of QAD CSS in a non-English environment, you can also use these functions to create alternate English labels. This provides an easy way of customizing labels without having to edit the HTML pages directly.

Creating Icons

Icon Maintenance lets you define 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 name of the icons associated with the items as defined in Icon Maintenance.

You can use icons in other areas of your site as needed. To implement actions may require additional customization to define the action. The `actionicon.js` file manages the actions associated with icons.

Changing Labels

You can use String Translation Maintenance to translate many of the field and buttons labels and informational text and phrases that appear on QAD CSS pages.

While this function is primarily intended to support non-English environments, it also provides an easy way for you to customize labels without having to directly modify code.

Use String Translation Maintenance to locate the current text that you want to change. Then specify a different string in the Translated String field.

Example You want to display the PDF version of a brochure about a product in the item catalog that customers can access from the Item Detail page. The field for a PDF file is currently labeled Machine Documentation. To change this label to Product Brochure, access String Translation Maintenance. Search for the string Machine Documentation. In the detail editor, specify the value Product Brochure for the Translated String value.

Customizing Help

An HTML-based context-sensitive online help system is available in QAD CSS. There are two sets of help information:

- Help information on administrative modules comes complete with navigation aids such as a table of contents, index, and search options. This information is intended for administrators and customer service representatives.
- Help pages for customer-facing modules to be used by external customers such as Order Entry and Shopping Cart are not navigable but can be easily customized in both content and style using any HTML editor.

To customize help information for a customer-facing module, open and edit the corresponding help page in the following folder using any HTML editor:

QADCSSInstallDir/qadcss/help/custom

The name of the help page is the same as the module page name.

To customize help styles for all customer-facing module help pages, open and edit the following file using any text editor:

QADCSSInstallDir/qadcss/help/custom/help.css

Important Do not change the file name of the help page or the Cascading Style Sheet (.css) file.

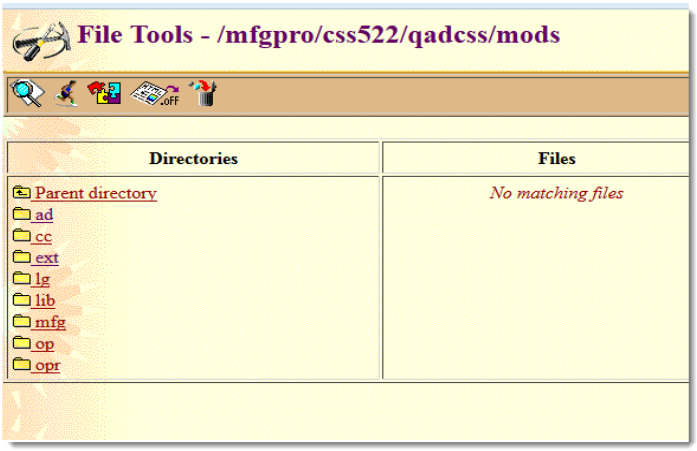
Customization Best Practices

When dealing with custom programs, follow these best practices and guidelines.

Maintaining CSS Directory Structure

CSS programs are created and classified under directories such as `ad`, `br`, `ca`, `cc`. When custom programs are created, put them in the respective custom directory. There is no need to change the current structure. It is similar to QAD source code structure.

Fig. 4.5
Customization Directory Structure Example



When custom programs are stand-alone reports or customized web pages, copy them to the corresponding custom directory and maintain them there. The modifications directories are listed first in the `qadcss.ini` file. This approach is similar to QAD source code maintenance.

Fig. 4.6
`qadcss.ini` Example

```
# QAD MFG/PRO eb2.1 PROPATH
./
./mods/mfg
./mods
./css_se/mfg
./css_se/
./css/mfg
./css
../mods_EDI_API
../mods_EDI_API/us
../EDI_API
../EDI_API/us
../mfgpro/eB21/SP9
/mfgpro/qxtend17/adapter
/mfgpro/qxtend17/adapter/triggers
/mfgpro/qadtest
/mfgpro/qaddev
/mfgpro/qad2009
/mfgpro/qad2009/us
/mfgpro/qad2009/triggers
/mfgpro/qad2009/xrc
/mfgpro/qad2009/src
/mfgpro/qad2009/bbi
```

Moving to Super Layer

The super layer provides highly flexible reusable components:

- Easy access to standard functionality

- The ability to override or enhance standard functionality without changing the standard functionality

You can move new custom procedures to the super layer.

1. Add a layer to the stack:
   a. Update Extensions
   b. Update Master Include for Extensions
   c. Create `super.p`
   d. Update the super procedure stack in Super Layer Maintenance
2. Move the custom procedures to the new super layer.

Creating a Layer

In creating a layer, follow these guidelines:

1. Obtain the custom copy of the `lib_ext_layerui.i` and `lib_ext_layerex.i` files.
2. Add reference to `ext_xx_superui.i` and `ext_xx_superex.i` in the master extension layer.
3. Create `empty.i` for the two `_ext` placeholders.
4. Create `lib_xx_superui1.p` and `lib_xx_superex1.p` and include the correct super layer reference.
5. Go to Super Layer Maintenance and add `lib_xx_superui1.p` and `lib_xx_superex1.p` to the end of the respective stacks.
6. Restart the web agents.

Moving Custom Procedures

In moving custom procedures, follow these guidelines:

1. Identify what procedures to move and whether they belong to the UI or EX layer.
2. Separate UI, Business Rules, and Data.
3. Identify shared temporary tables.
4. Move one procedure at a time.
5. Test after each move.

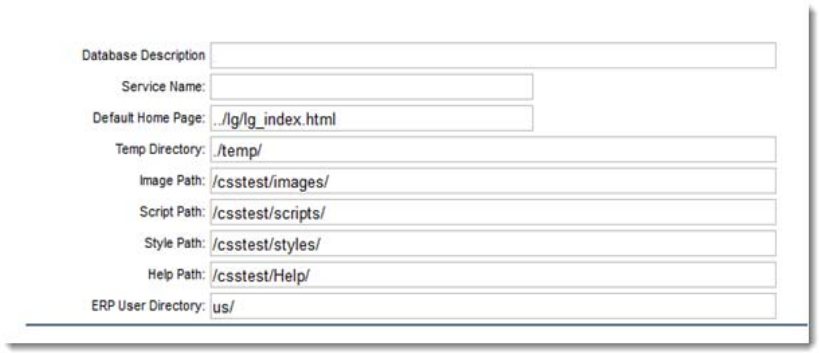
Copying Custom Images to Custom Directories

Copy all the standard images and style sheets to custom directories. These directories are referenced in the CSS System Control Settings. These custom directories are also referenced in the `httpd.conf` file, which controls the virtual directory in Apache.

For catalog images, copy them to a separate directory under images, which is referenced on the CSV file in Catalog Upload.

This approach leaves all the original files intact.

Fig. 4.7
CSS System Control Settings



Creating System Registry Entries

Create system registry entries with an ID equal to the customer ID. This way, they are easy to report.

Chapter 5

Managing Order Entry

This chapter describes the various options that QAD CSS provides for managing order processing.

Introduction 62
Explains how CSS helps manage order-entry layout.

Order-Entry Types 62
Describes the three different styles of order-entry and gives overviews of order entry 1, 2, and 3.

Configuring Order Entry with Registry Settings 65
Explains home page registry settings, settings affecting OE1, OE2, OE3, catalog settings, the item detail page, shopping cart, order preparation page, order confirmation, update ship-to or bill-to address, and the order summary page.

Configuring Other Pages with Registry Settings 89
Explains how to configure the company contact page, order reports, order templates, and order processing.

Configuring Order Entry with Admin Functions 94
Describes administrative functions which have special significance during order processing implementation, including specifying item layout, defining categories, defining order processing options, creating hyperlinks to carriers, and defining specials.

Order Entry with Optional Features in QAD EA 98
Lists the features of QAD EA that affect the maintenance of sales orders, explains how to manage dates during order entries, use ATP calculations, display date-related information, ATP enforcement, and using ATP settings to process an order.

Introduction

With QAD CSS, you have many flexible options for designing the layout of your order-entry system and managing the way your customers interact with the Web site.

See “Using Registry Settings to Customize Your Web Site” on page 6.

Much of this flexibility results from the use of registry entries, which let you customize the Web interaction based on user ID, customer, security group, marketing group, and customer group.

See “Setting Up Security Groups” on page 36.

The functions displayed on the menu bar and the navigation menu can be 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.

In addition, three distinct types of order entry are supported.

The display of individual items in the item catalog can be customized. Various options let you control the display of pictures, icons, descriptive text, customer item number, and currency for each item line. Others let you control more complex processing such as determining quantity available, pricing, and quantity available to promise (ATP).

See “Defining Specials” on page 98.

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.

You can also configure how users can track their orders in QAD CSS and through shipping carrier Web sites.

This chapter illustrates the three types of order entry and then discusses how you can use various registry settings and administrative functions to control aspects of display and processing behavior. It also discusses other administrative functions that are used to support order processing.

See “B2C Order Processing” on page 113.

This chapter assumes a B2B implementation where users are predefined. However, many of the order-processing features described in this chapter are identical for B2C, especially the catalog layout. Chapter 6 discusses the special setup required in a B2C scenario.

Note Each product catalog is related to a particular domain defined in Data Source Maintenance. The user’s domain is determined by the customer association at login, and this, in turn, determines the items the user can see.

Order-Entry Types

Three basic styles of order entry are supported:

- Order entry 1 (OE1) lets buyers browse the catalog by using drop-down category lists to navigate. This approach is optimal when you have many types of items on the Web. The right pane for OE1 is optional and activated through registry settings. The main OE1 page is:

  `op/op_item_lookup.html`

- Order entry 2 (OE2) displays categories as hyperlinks. This approach works best when the choice of types of items is more limited. OE2 always includes both a right and a left pane. The main OE2 page is:

  `op/op_index.html`

  Note A separate version of OE2 is used in the B2C scenario: `op/op_indexB2C.html`. The same settings apply to both of these pages.

See “Defining Specials” on page 98.

  Order entry 2 is somewhat more flexible and feature rich than order entry 1. Marketing specials, defined with the Specials Maintenance administrative function, can be used only with OE2. In addition, graphics can be associated with OE2 categories. The right pane for OE2 includes a built-in express cart feature and displays login information for the user.

- Order entry 3 (OE3) lets buyers order by item number. It is also known as heads-down order entry and accommodates buyers who know exactly which items they want to order. The main OE3 page is:

  `op/op_hdoframe.html`

  Order entry 3 can be integrated as an optional choice with either order entry 1 or order entry 2. You can also include both order-entry options on your home page so users can choose which method they want to use.

The system uses two registry settings to manage the default order entry for a site:

finditOE. This setting determines which page displays when the buyer searches from the main QAD CSS home page: this can be set to OE1 or OE2.

OEHome. This setting determines 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.

These two fields are normally set to the same value.

During user login, QAD CSS determines the value of *OEHome* 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, view the cart, and then click Continue Shopping. The system then needs to know which order-entry page to display.

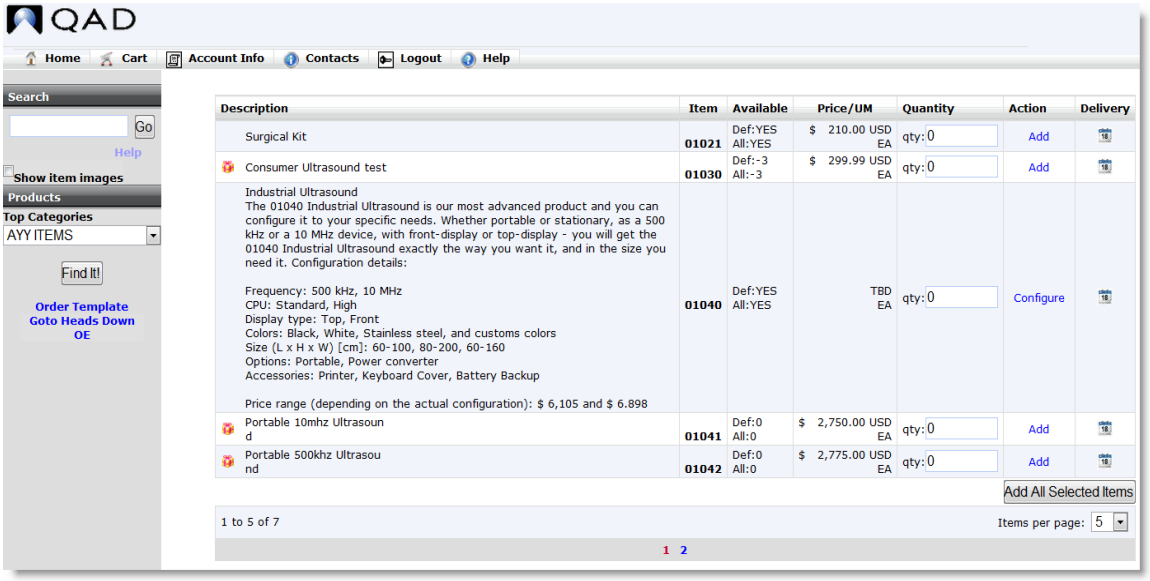
Order Entry 1 Overview

Order entry 1 lets the buyer choose products by selecting categories and subcategories from drop-down lists. See “Creating an Item Catalog” on page 22.

Categories are defined when you load your items and should represent the way your marketing department presents products in a sales catalog.

In Figure 5.1, choices have been made for category and subcategory, resulting in the display of matching items.

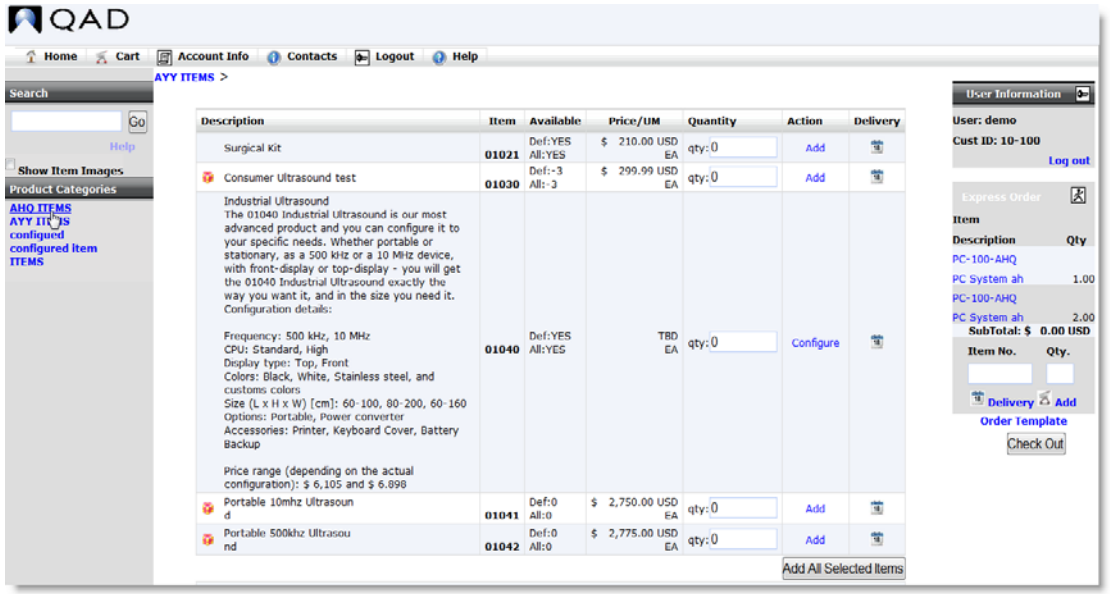
Fig. 5.1
Order Entry 1 Catalog



Order Entry 2 Overview

Order entry 2 lets the buyer choose products by navigating with hyperlinks. See the hyperlinks on the left pane. Clicking a hyperlink displays the catalog of matching items.

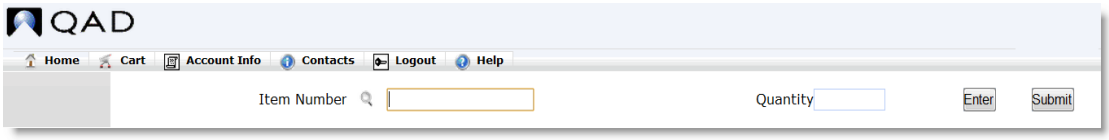
Fig. 5.2
Order Entry 2 Categories



Order Entry 3 Overview

Order entry 3 lets buyers enter item numbers directly; there is no visual listing of items. This is useful for someone who always orders the same items, or is ordering from a printed catalog.

Fig. 5.3
Order Entry 3



Configuring Order Entry with Registry Settings

The QAD CSS registry contains many settings that enable you to tailor and fine tune the order-entry process. These settings can vary based on the ID of the user entering the order or based on the customer account. Settings can also vary based on the group membership of the user—security group, marketing group, or customer group.

This section includes examples of order-entry pages pointing out where registry settings can be used to configure the display or interaction with the screen.

The screens are described based on the order in which they display when a user creates an order, starting with the home page and ending with the order summary. Catalog layout is described after the OE1 and OE2 initial pages, since it applies to both; OE3 does not use the catalog.

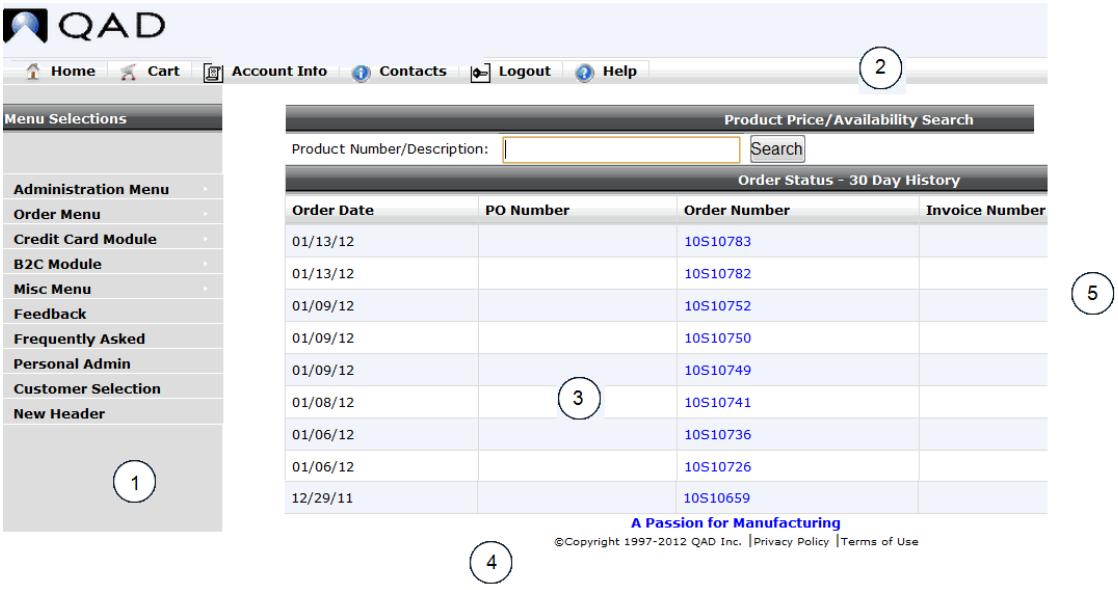
Many of the pages are annotated with numbers pointing to the corresponding registry setting that affects that area of the page. In some cases, registry settings affect general processing related to a page and are not tied to specific page features; these are typically not annotated.

Home Page Registry Settings

Since the home page sets the framework for the entire user experience, many aspects can be configured through registry settings. In the following discussion, settings are grouped into the five major areas outlined in Figure 5.4:

1. Left pane, menu selections
2. Page Header
3. Page Content
4. Page Footer
5. Right Pane

Fig. 5.4
Home Page Functional Areas



Left Pane, Area 1

See “Assigning Menus” on page 40.

The QAD CSS menus display in the left pane. A default menu setup is defined when QAD CSS is installed. The pages that can display on the menu are defined in System Module Maintenance. The menu structure itself is tailored for the security group of the logged-in user in Menu Maintenance.

Page Header, Area 2

The page header can have different styles. The *exHeaderType* registry setting determines the page header style:

- When exHeaderType is 1, the header has two parts, one for menu buttons and the other for items such as the company logo and release number.
- When exHeaderType is 2, the header has three parts. The first two parts are similar to type 1. The additional header layer includes the date, a welcome message, cart summary, checkout button, and search option.
- When exHeaderType is 3, the header is customizable. You can use the procedure insertNewGenHeader3 (`lib_sys_superui1.p`) to customize the header.

Type 1 Page Header

Figure 5.5 illustrates the type 1 header. Numbers correspond to the numbers in parentheses in the descriptions following the figure.

Fig. 5.5
Type 1 Page Header

The following registry settings affect the display of both type 1 and type 2 headers:

compLogoHref (2). This setting defines the URL that will be associated with an additional company logo located in the header, defined with *compLogoName*.

compLogoName (2). 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.

See “Using qad_style.css” on page 48.

In addition to these registry settings, you use administrative functions to control the following display features:

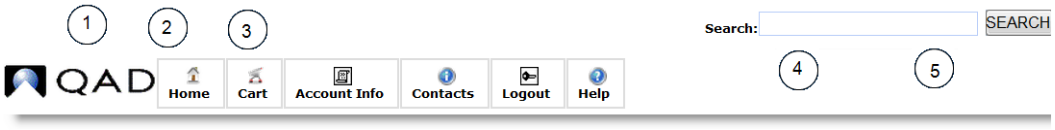
See “Assigning Menu Bar Buttons” on page 39.

- Use Menu Button Maintenance (4) to define the images that display on the buttons. Security groups associated with buttons in this program also determine which buttons display in the menu.
- Use System Control Table Maintenance (5) to determine if the QAD CSS release number displays (Show DB Info) and if the debug setting displays (Debug Flag).

Type 2 Page Header

Figure 5.6 illustrates the type 2 header. Numbers correspond to the numbers in parentheses in the descriptions following the figure.

Fig. 5.6
Type 2 Page Header



The additional elements that display when you use a type 2 header are configured with the following registry settings:

exHeaderMenu (1). This setting controls the display of an additional Quick Menu bar in the header. If used, you must determine what you want included on the Quick Menu; this may require custom programming.

exHeaderCart (2). This setting controls the display of the shopping cart summary and cart icon in the header.

exHeaderDate (3). This setting controls the display of the system date information in the header.

exHeaderWelcome (4). This setting controls the display of a message in the header welcoming the user by name; for example, Welcome John Smith.

exHeaderSearch (5). This setting controls where the search object displays in the header. Valid entries are Top, Bottom and none, to suppress display.

Type 3 Page Header

When exHeaderType setting is 3, the header is customizable. You can use the procedure insertNewGenHeader3 (`lib_sys_superui1.p`) to customize the header.

Page Content, Area 3

Messages can be created in Message Maintenance or User Message Maintenance and display on the screen in the order defined by a registry setting.

The type of content is managed with the *indexOrder* setting. The registry settings that affect this section of the page are:

indexOrder. This setting controls the display of the login page for B2B environment. This field can be set to any of the following or any combination of the following. The order you specify for the registry setting determines the order of display on the home page, from top to bottom.

See “Defining Welcome Messages” on page 150.

- MOTD displays any message of the day defined in Message Maintenance for the current date. Multiple messages can display.
- SEARCH displays a search box for searching through the product catalog. If this fields is displayed, it is affected by:

See “searchList” on page 71.

- The *searchList* setting determines whether the user’s associated customer ID is used in the search for items.

See “finditOE” on page 63.

- The *finditOE* setting determines which order-entry page displays the results of the search.

See “Defining Messages for Individuals” on page 150.

- MESSAGE displays any messages created for the logged-in user in User Message Maintenance.
- STATUS displays all orders previously placed by the user and the order status.

indexOrderStatusHistory. This setting determines how many days of order history are displayed when *indexOrder* or *indexOrderHome* (for OE2) include STATUS. The system displays orders with an entry date up to this many days before today’s date. The default value is 30.

Set this value based on the transaction volume of the company.

Page Footer, Area 4

Figure 5.7 illustrates the page footer. This footer is used regardless of the order-entry type.

Fig. 5.7
Page Footer

Two settings affect the display of information in the page footer:

hostCopyrightHref. This setting defines the host copyright URL located in the footer. Change this to a value appropriate for your installation.

hostCopyrightText. This setting defines the host copyright text located in the footer. Change this to a value appropriate for your installation.

Right Pane, Area 5

Area 5, the right pane, always displays with order entry 2. For order entry 1, display is controlled by the *showRightPane* setting. On the home page, the content of the right pane is always the same.

Order Entry 1

The settings described in this section affect the OE1 main page. Some settings affect both OE1 and OE2.

The following settings apply to the search option and item categories in the left pane.

showLookupSearch. This setting determines if the item search box displays at the top of the left pane. *showSearchIndex* has the same effect for order entry 2.

itemTypesTopLabel-eng. This setting determines the title in the OE1 index page for the top label of item categories when the language is English. The default value is Products.

itemTypesLabel0-eng. This setting determines the label in the OE1 index page when the language is English. The default is Top Categories.

This and the following related label settings 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 – itemTypesLabel5-eng. Used as lower category labels in OE1 when the language is English.

showHDOfromlookup. This setting determines if a link for heads-down order entry displays in the OE1 page.

Note This order-entry method may be more suitable for a B2B environment than for a B2C environment.

The following setting applies to the center page content:

partslookuplogo. This setting determines the name of the image file displayed on the OE1 page before the users searches for items. By default, this is `parts_look.gif`.

The following setting applies to the right pane:

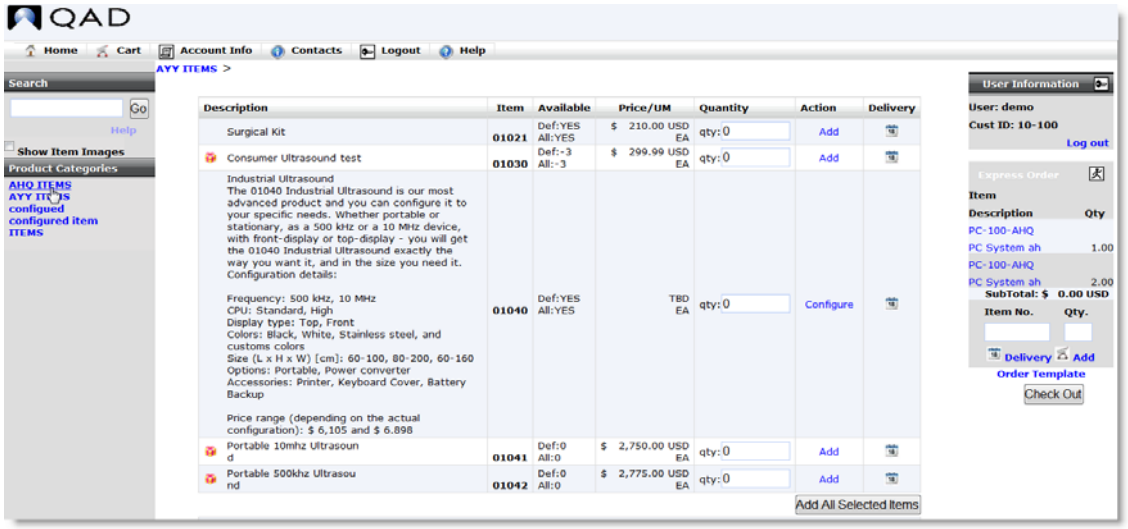
showOrderEntryRight. This setting determines whether a separate right pane displays in the OE1 screens. To completely turn off the display of the right pane in OE1 screens, both this field and *showRightPane* must be No.

See “Right Pane” on page 71 for a discussion of registry settings affecting the right pane.

Order Entry 2

Order entry 2 lets the buyer choose products by navigating with hyperlinks. Figure 5.8 illustrates the main ordering page using this style.

Fig. 5.8
Order Entry 2



Note The B2C main page is based on OE2 and the same settings affect the way it displays.

The some of the registry settings described in this section affect OE2 only; others also affect OE1. For example, the left pane settings apply to both pages and the right pane settings apply to OE1 if a right pane is being displayed.

The following registry setting affects the content of this page. It is similar to the *indexOrder* setting that controls the home page display.

indexOrderHome. 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 displays only category 2 level items in the product catalog.

See page 150.

- MESSAGE displays any messages created for the logged-in user in User Message Maintenance.

See page 68.

- STATUS displays orders previously placed by the buyer and the order status. *indexOrderStatusHistory* determines how many days of history display.

See “Defining Welcome Messages” on page 150.

- MOTD displays either 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.

Settings for Left Pane

A number of registry settings affect the left pane. Most of these also affect OE1.

showIndexSearch. This setting determines if the item search box displays at the top of the left pane. *showLookupSearch* has the same effect for OE1.

searchList. This setting determines whether the user’s associated customer ID is used in the search for items:

- Master (or blank): Search for items not associated with a customer. This is the default value.
- Customer: Search for items associated with the currently logged-in customer or items associated with any customer IDs specified in the Master Customer field for the current customer. If no customer IDs are specified for the Master Customer field, only items associated with the current customer are found.

vupdateItemThumbImage. This setting determines if a check box displays in the left pane of the product catalog so buyers can toggle the display of item images.

vshowItemThumbImage. This setting determines the default value for the Show Item Image check box when *vupdateItemThumbImage* is Yes.

showGroupImage. 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.

Right Pane

These settings control the display of features associated with the right pane for both OE1 and OE2. The right pane always displays in OE2, but displays only when *showOrderEntryRight* is Yes for OE1.

QCartDescTruncate. 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. The default number of characters is 12.

templateOrder. This setting determines if a link to template orders displays. If Yes, the Save Order Template button also displays in the shopping cart.

getPriceOfConfigParts. This setting determines if the price of configured items is calculated and displayed in the catalog.

addNonAvailItem. 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 as well as 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.

For details on this feature, see “Displaying Date-Related Information” on page 102.

showDeliveryIcon. This setting determines whether the Delivery button displays next to the Add button for viewing the system-calculated delivery or ship date. This setting also affects the catalog entries and the shopping cart.

Catalog Settings

The item catalog is the heart of your Web order-entry system, and is the most complex piece to configure. Many different registry settings can be used to manage the display of this screen. The catalog can be accessed from either the OE1 or OE2 screens and is essentially the same for the two types of order entry pages.

Fig. 5.9
Selecting Items from Catalog

The basic layout of the catalog is defined in Item Layout Maintenance. You use that program to determine which columns of information are included and to configure the column labels. A number of registry settings define the defaults for Item Layout Maintenance. See “Specifying Item Layout” on page 94.

The categories that determine how items are grouped are defined in Item Types Maintenance. These categories are normally created during the loading of item information. Once you have configured the basic layout, you use additional registry settings to manage when the system

accesses information in QAD EA for pricing and availability, how detail hyperlinks are implemented, how the user's language affects display, and how items are added to the shopping cart. See "Item Categories" on page 12.

For configurable items defined with the rules-based Configurator:

- The Availability column always shows YES.
- The Action column on the item selection page shows Configure rather than Add, which means you need to configure the item before you add the item to the shopping cart.
- The Price/UM column shows TBD (to be decided), since the price is calculated during configuration. So it is recommended that you add some item price information to the CSS item description for reference purposes.

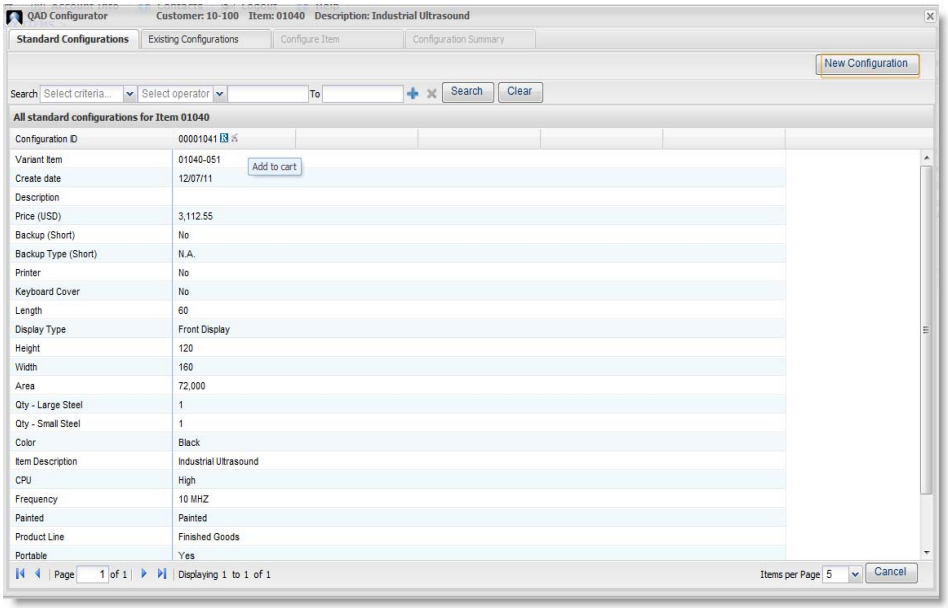
See Figure 5.9.

Note Currently, Configurator-defined items that are of kit type—physical kit or phantom kit—are not available in CSS.

Figure 5.10 illustrates the pop-up configuration questionnaire when you click Configure. See "Reloading a Configuration" and "Creating a New Configuration" in *User Guide: QAD Configurator* for more information on how to configure an item.

Notice the *Add to Cart* icon in Figure 5.10; instead of creating a new configuration, you can just add existing configurations to your shopping cart.

Fig. 5.10
Configure Items in Catalog



Settings for Hyperlinks

See "Item Detail Page" on page 79.

itemDetailLink. This field determines where hyperlinks display in the item catalog. Clicking a hyperlink displays an item detail page.

Three fields can have associated hyperlinks that display a detail page:

- Item image
- Customer item number
- Item number

The value of *itemDetailLink* determines the default values for these three fields in Item Layout Maintenance. The field is set to any combination of three Yes and No values.

itemDetailPgm. This setting specifies the program to run when a buyer clicks a hyperlink to display more information in the catalog.

Specify `../op/op_itemimage.html` for pop-up (the default).

Specify `../op/op_itemdetail.html` for a new HTML page.

itemDetailStyle. 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 (the default) displays a new HTML page.
- Popup displays a smaller window.

Item Layout Settings

See “Specifying Item Layout” on page 94.

itemLayout. This setting determines whether each of the 15 fields in Item Layout Maintenance is selected by default. 1 indicates selection of field as default; 0 indicates non-selection. You can change these defaults in Item Layout Maintenance if needed.

The values specified in Item Layout Maintenance determine item details displayed in the center pane of the product catalog.

itemLayoutHeader-eng. This setting defines the column labels for the selected item details to be displayed in OE1 and OE2 for the English language. Figure 5.9 displays the default values of Description, Item, Avail, Price/UM, Add.

itemLayoutLabel-eng. This setting defines the labels for each detail for an item in the catalog for the English language.

showSortBy. This field controls how items are sorted in the product catalog. You can specify any value in the QAD CSS item table (wpro_cust_item) such as sort_name or cust_part. The default is item_number.

More than one sort value can be specified using a list separated by carets (^).

showLegendBar. 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 displays the name of the icons associated with the items as defined in Icon Maintenance.

Cart Update Settings

addItemOnce. 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.

maxOrderLines. This setting determines the maximum number of lines users can add to the shopping cart. Set this to 0 (zero) if the number of lines is unlimited.

skipViewCartOnAdd. This setting determines if the cart displays every time an item is added.

Yes (the default): The shopper can choose to display the cart when they want to.

No: The shopping cart displays each time an item is added.

Language Settings

useLangItems. This setting determines how the user's associated language—defined in User Maintenance—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.

Quantity Settings

itemQuantityFormat. This setting determines the format and length of the Item Quantity fields that display in the three order-entry pages and the shopping cart (getCurItems, Item_detail, bcItem_confirm, and bchdo_entry). The default format is >>>>>9.99.

itemQuantityShow. This setting determines how many digits are shown in the same quantity fields as described for *itemQuantityFormat*. The default is 8.

runGetMinMaxQty. This setting determines whether QAD CSS enforces the minimum and maximum order quantity defined in Customer Item Maintenance.

Inventory Availability Settings

You use three related settings to determine how inventory availability displays in the catalog: *runGetWhseQty, runGetAllWhseQty, runGetDefWhseQty.*

See "Specifying Item Layout" on page 94.

Note To see this information in the product catalog, the correct fields must be marked for display in Item Layout Maintenance.

The setting of *runGetWhseQty* has three possible values:

Off: Do not perform any availability calculation. Even 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 the *runGetAllWhseQty* and *runGetDefWhseQty* and display the text contained in one of two configurable messages, indicating that stock is available or unavailable.

When *runGetWhseQty* is set to Qty or Text, the values of *runGetAllWhseQty* and *runGetDefWhseQty* determine if inventory quantities are found in QAD EA or read from values stored in the QAD CSS customer item master (wpro_cust_item) table.

runGetAllWhseQty. This setting determines if QAD CSS gets information about the on-hand inventory quantity from QAD EA or from QAD CSS to display with other item details.

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 calculation method for quantity available to allocate specified 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.

runGetDefWhseQty. This setting determines if QAD CSS calculates the on-hand inventory quantity for the default site from QAD EA or from QAD CSS to display with other item details.

The default site is determined in this order:

- The system searches first for a site associated with the customer record in QAD CSS.
- If the customer in QAD CSS does not have an associated site, the site defined in QAD CSS Order Control Maintenance is used.
- If a site is not found in QAD CSS, the site defined in Customer Data Maintenance (cm_mstr) in QAD EA is used to populate the sales order header.
- If the line item does not exist at the default header site, the system looks for 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.

See “Using ATP Calculations” on page 102.

Note ATP calculation is based on the default site; when ATP is enabled in QAD CSS, the Available column should be set to display the quantity in the default site only.

The messages that define the text displayed when the value of *runGetWhseQty* is Text are defined in Error Message Maintenance:

- OP000244 displays when zero or less quantity is available at the default site or in all sites. The text of this message is currently set to Out of Stock, but you can modify it to meet your own requirements. The message text can also display the value of the symbol [@QtyAvail] when it is included.
- OP000245 displays when a quantity greater than zero is available at the default site or in all sites. The text of this message is currently set to Available, but you can modify it to meet your own requirements. The message text can also display the value of the symbol [@QtyAvail] when it is included.

The combination of these three registry settings provides great flexibility in how you manage and display availability in the catalog. Here are some possible options:

- If you do not want to display availability information, turn off the display in Item Layout Maintenance and set *runGetWhseQty* to Off. This optimizes performance when quantity information is not relevant.
- If you want to display full quantities for each item based on information from QAD EA, turn on the field display in Item Layout Maintenance, set appropriate side labels for the fields, set *runGetWhseQty* to Qty, and set both *runGetDefWhseQty* and *runGetAllWhseQty* to Yes.
- If you want to display a message based on availability information from QAD EA, choose which inventory to check: either default site or all sites. Then, turn on display for that field only in Item Layout Maintenance, leave the side label blank, set *runGetWhseQty* to Text, and set either *runGetDefWhseQty* or *runGetAllWhseQty* to Yes. The message Available displays when a quantity is available; otherwise, Out of Stock displays. These messages can be modified in Error Message Maintenance.
- If you want to just display a different message—such as Call for availability—for every item in the catalog, turn on the display for default site quantity in Item Layout Maintenance, leave the side label blank, set *runGetWhseQty* to Text, set *runGetDefWhseQty* and *runGetAllWhseQty* to No. Then change both message Op000244 and Op000245 to Call for availability in Error Message Maintenance.
- If you want to always display the quantity based on information maintained in QAD CSS (not QAD EA), turn on display for either default site or all sites in Item Layout Maintenance, set appropriate side labels, set *runGetWhseQty* to Qty, set *runGetDefWhseQty* and *runGetAllWhseQty* to No.

Note The catalog design applies to the entire catalog; you cannot set the display for individual items.

Delivery Date Setting

You can configure the catalog to include a Delivery button using the *showDeliveryIcon* setting. This setting also affects the Express Order cart and the shopping cart page.

Shoppers click this button to display information about when they can expect to receive their order. The system displays either the date the order can ship (due date) or the date the shipment can be expected to arrive at the shopper's location (promise date). How the system calculates this information from the catalog, Express Order cart, and shopping cart depends on setup in QAD EA:

- Calculate Promise Date in Sales Order Control (7.1.24)

- ATP Enforcement Enabled in Sales Order Control (7.1.24)
- ATP Enforcement Level in Item-Site Planning (1.4.17) and Item Master Maintenance (1.4.1)

See “Managing Dates During Order Entry” on page 99.

Pricing Settings

runGetBestPrice. This setting determines if QAD CSS runs the best pricing logic in QAD EA 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. When set to No or False, price defaults to 0 (zero).

runGetBestPriceConfigParts. This setting determines if QAD CSS runs the best pricing logic in QAD EA to obtain the configured 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 unnecessary processing.

This setting is used with *runGetBestPrice*. When *runGetBestPriceConfigParts* is No or False and *runGetBestPrice* is Yes or True, the system returns the best price for the item, ignoring the configuration. When both are No or False, price defaults to 0 (zero).

userCurrency. 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 QAD CSS user in User Maintenance
- If user currency is blank, the value from the customer bill-to in QAD EA

This currency is associated with the session at login and determines the currency used for displaying prices.

useCurrencyUnicode. When this is Yes, the system looks for a hexadecimal unicode associated with the currency for this user session in Currency Unicode Maintenance. If one has been defined, the symbol defined by this unicode value 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.

Order Entry 3

Order entry 3 lets buyers enter item numbers directly; there is no visual listing of items. This is useful for someone who always orders the same items, or is ordering from a printed catalog.

Note Currently, configurable items defined with QAD Configurator cannot be ordered from Order Entry 3.

The following registry settings apply to OE3 only:

HDOHeight. This setting determines the height of the heads-down order-entry frame set. By default, this is 180.

HDOHeightNS. This setting determines the height of the heads-down order-entry frame set for Netscape. By default, this is 225.

See page 72.

addNonAvailItem. This setting determines whether buyers can add items to the cart that are not defined in QAD CSS (wpro_cust_item table). This setting also affects the Express Order cart from OE1 and OE2.

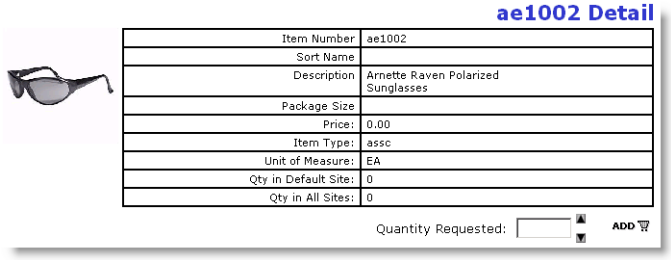
Item Detail Page

See “Settings for Hyperlinks” on page 73.

In Item Layout Maintenance, you can specify that the item number, item image, or customer item number is a hyperlink to display another page with additional detail information about the item.

Figure 5.11 illustrates an inline detail page.

Fig. 5.11
Inline Detail Page



One registry setting affects this page.

showDetailImage. This setting determines whether an image is included in the item detail page.

Table 5.1 lists the fields that display on the item detail page (`op/op_itemdetail.html`). The listed fields display regardless of whether a value is found except for the Schematic Diagram and Machine Documentation fields. These only display when values exist in the wpro_cust_item table.

Table 5.1
Item Detail Display Fields

Label	**wpro_cust_item Field**
Item Number	item_number
Sort Name	sort_name
Description	item_description[1] and item_description[2]
Marketing Description	item_long_desc
Package Size	other_fields[15]
Price	Calculated from QAD EA. If the user detail record for the current user and customer has Show Euro set to Yes, price displays in both USD and euros.
Item Type	Code0 (This is the category code.)

Label	wpro_cust_item Field
Unit of Measure	um
Quantity in Default Site	Calculated from QAD EA.
Quantity in All Sites	Calculated from QAD EA.
Schematic Diagram	schematic_file (Displays only when a value exists.)
Machine Documentation	pdf_file (Displays only when a value exists.)
Quantity Requested	other_fields[4]

See “Changing Labels” on page 56.

Note If the default labels are not suitable for your use of these fields, you can modify the HTML directly or use String Translation Maintenance to modify the labels.

Shopping Cart

Users can view the contents of their shopping cart by clicking the Cart button in the menu bar. A number of registry settings can be used to manage the information that displays for items in the cart and what details users can modify.

The following fields that were previously discussed also affect the shopping cart display:

- *itemQuantityShow* (page 75)
- *itemQuantityFormat* (page 75)
- *deleteUnavailableItem* (page 72)
- *templateOrder* (page 72)

Date-Related Registry Settings

You can use a number of interrelated registry settings to interact with settings in QAD EA that affect date calculations. Using these settings is described in detail in “Order Entry with Optional Features in QAD EA” on page 98. This section summarizes registry settings affecting the shopping cart that are described in more detail on page 98.

See “Managing Dates During Order Entry” on page 99.

showDeliveryIcon. This setting determines whether a Delivery button displays next to each line. When users click this button, the system calculates a delivery date for the requested quantity based on the setup and integration with ATP features defined in QAD EA.

setReqDate. This setting determines the default value of the request date when the shopping cart first displays. The options are:

Yes: Order line request date defaults from the system calculated date.

No: Order line request dates are blank.

showPromDate. This setting determines whether the promise date displays in the order header here and on the Finish Order page.

When this field is Yes and *showLinePromDate* is No, 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 *showLinePromDate* to Yes.

showLinePromDate. This setting determines whether a promise date displays for each order line item.

showReqDate. This setting determines whether a Request Date field displays in the order header letting shoppers update the date that applies to the entire order.

Typically, either *showReqDate* or *showLineReqDate* is set to Yes, not both. However, when *showReqDate* and *showLineReqDate* are both Yes, an Apply All button displays beside the header Request Date field. Clicking this button applies the header request date to all order lines.

showLineReqDate. This setting determines whether a Request Date field displays for each order line item, letting shoppers update a date for each line. Values are:

No: Line item request dates are not entered. *showReqDate* is typically Yes in this case.

Yes: Line item request dates are entered.

Required: Same as Yes but input in the field is mandatory during order entry.

Pricing Settings

The following registry settings affect the display of pricing and how users interact with configured items:

getPriceOfConfigPartsinCart. This setting determines if the price of configured items is calculated and displayed in the shopping cart.

configReviewRequired. This setting determines how customers interact with the system when they place in their carts configured items that are defined in the Configured Products Module of QAD EA.

When this is Yes, an icon displays next to a configured item when it is put in the cart. Buyers can click the icon to validate the features and options. They then click Update Shopping Cart when they are satisfied with the configuration.

showExtendedPrice. This setting determines whether the extended price displays in the shopping cart.

Other Optional Fields

The following registry settings determine if additional update fields display in the shopping cart:

showLineSerNum. 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 the ShowSerial function returns a value of True. Then display the entered value on the order summary.

Note To activate the *Byline* setting, you must write custom code for the ShowSerial function to return the correct value. As installed, QAD CSS always sets this value to True.

The serial numbers entered when this field is Yes are not returned to QAD EA. You are required to map this value if you want it to be part of the QAD EA order; typically it is mapped as a line comment.

showLineComment. 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 to B2C.

showUOM. This setting determines if the default item unit of measure displays in the shopping cart.

Configured Item Defined with Configured Products Module

Features and Options in CSS build upon and support the Configured Products module of QAD EA; setup is done in the Configured Products module of QAD EA.

You can use the Configured field in the CSV file to control whether to select options for a configured item. When the Configured field in the CSV file is set to No or False, the system uses mandatory default options for the configured item and saves your effort to configure the item. See Figure 5.12.

If you want feature options other than the mandatory default options, leave the Configured field blank or specify any value except No or False. Then you can configure the item in the shopping cart. See the Configure icon in the Action column in Figure 5.13.

Fig. 5.12
Standard Bill

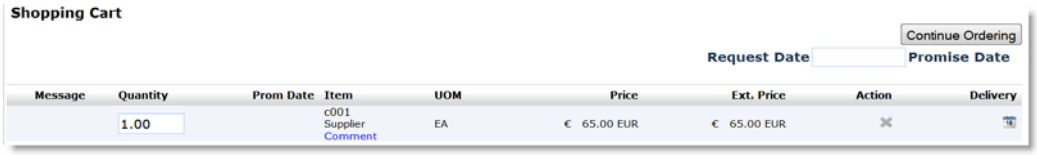
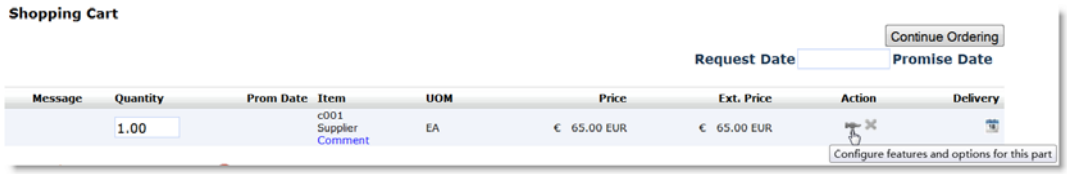


Fig. 5.13
Configure Feature and Options



Click the Configure icon to select feature and options, as shown in Figure 5.14. The full features and options of configured products can be shown by clicking the item that has child components. For example, Figure 5.15 shows components of the sterile probe in Figure 5.14.

Fig. 5.14
Features and Options

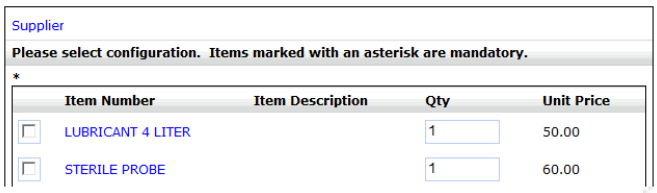
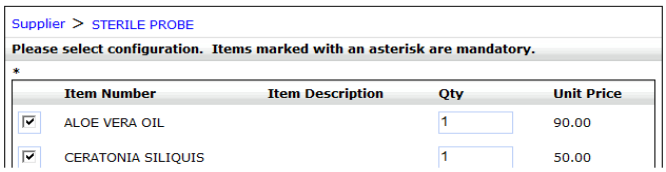


Fig. 5.15
Features and Options Page with Multi-level Structure



Registry settings that affect the configured item include the following:

configReviewRequired. This setting determines how customers interact with the system when they place configured items in their carts.

showPriceinConfigurator. This setting determines whether prices are included with the display of features and options on the page.

getPriceOfConfigParts. This setting determines if the price of configured items is calculated and displayed in the catalog.

Configurable Item Defined with QAD Configurator (Optional)

When *ConfiguratorWSURL* is set, QAD CSS for items defined with QAD Configurator is enabled. QAD Configurator is an add-on product for QAD EA.

For a configurable item defined with the rules-based Configurator, there is a *Reload Configuration* icon in the Action column on the Shopping Cart page. *Reload Configuration* means that you can still configure the item before you check out.

Fig. 5.16
View Configurable Items in Shopping Cart

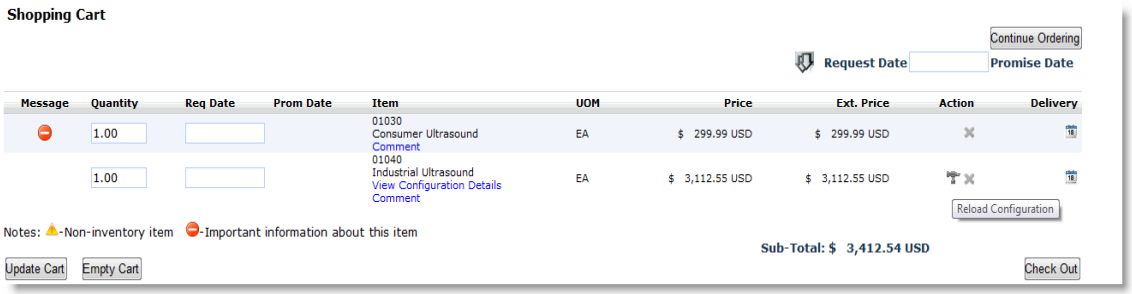
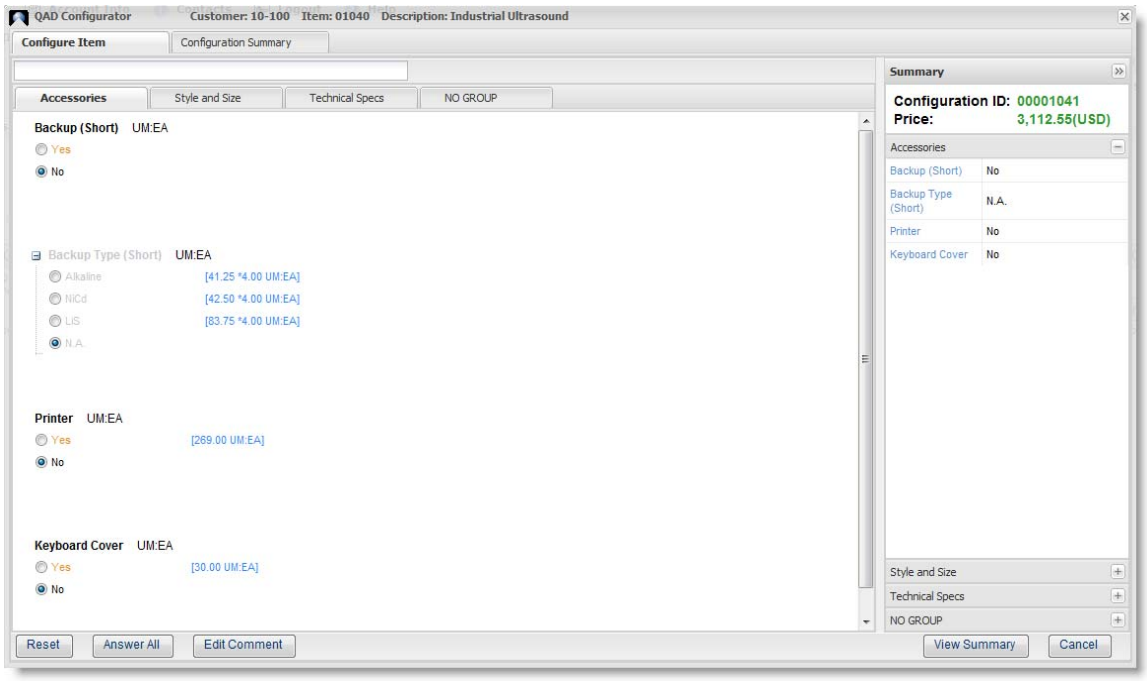


Figure 5.17 illustrates the pop-up configuration questionnaire when you click the *Reload Configuration* icon. See “Configuring Item” in *User Guide: QAD Configurator* for more information on how to configure an item that is defined in QAD Configurator.

Fig. 5.17
Configure an Item in Shopping Cart

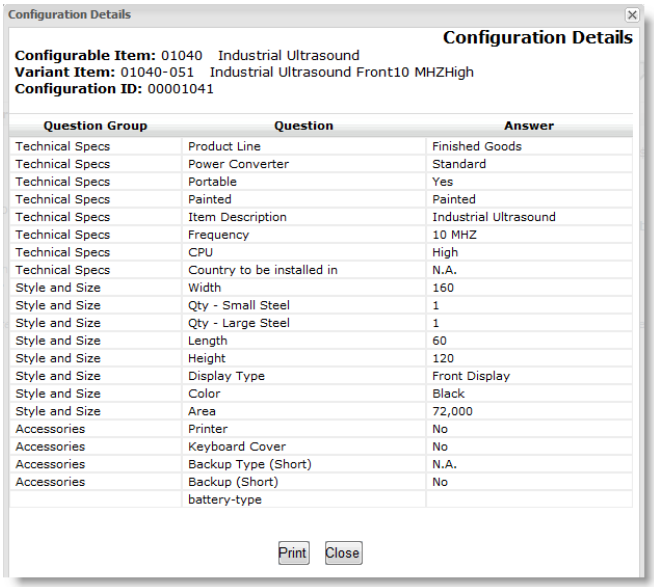


If the configurable item is defined in more than one group in Configurator, the questionnaire of the first group is launched here in CSS.

Note Different from the configuration questionnaire in QAD Configurator, the configuration questionnaire shown in QAD CSS does not display temporary and background questions.

You can always click View Configuration Details on the Shopping Cart page to see your configuration. An example of the configuration details is given in Figure 5.18.

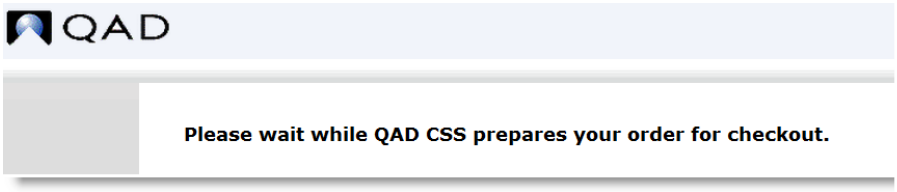
Fig. 5.18
View Configuration Details



Order Preparation Page

When you click Check Out from the shopping cart, the system can optionally display an intermediate page with a message that the system is processing the order. Whether this page displays is controlled by the *orderUIMode* setting.

Fig. 5.19
Preparation Message

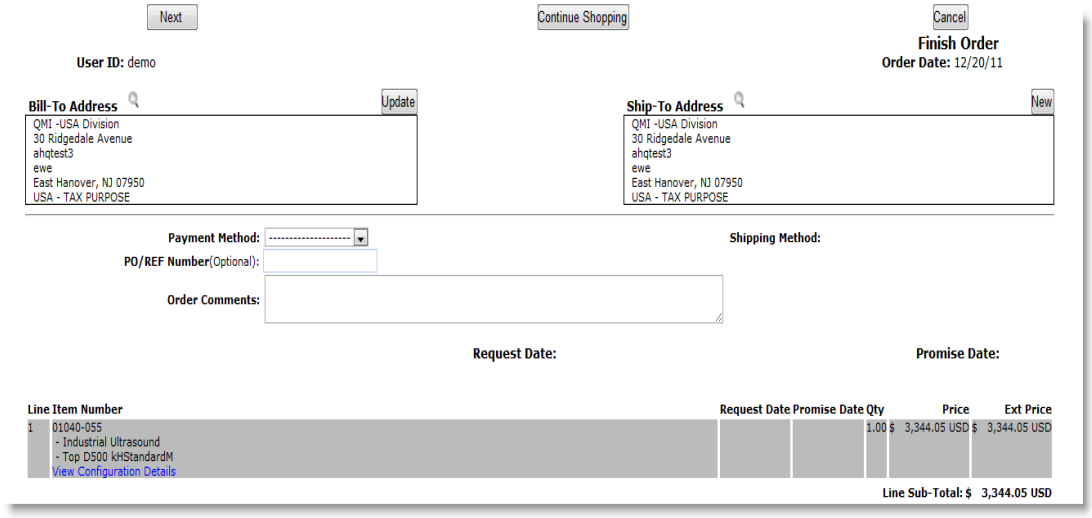


Set *orderUIMode* to Yes if the number of items in the cart is typically large so that preparing for confirmation may take a noticeable amount of time. Displaying the page ensures that the buyer is aware that activity is taking place.

Order Confirmation

A confirmation appears when you check out and before the order is actually submitted. You can review the order and update various order-level settings such as the shipping method, order comments, and ship-to address. For a Configurator-defined item, you can click View Configuration Details to see configuration details before submitting the order.

Fig. 5.20
Finish Order



Which attributes of the order display and which can be updated are managed through registry settings.

In addition, the following setting can be used if you want to display another page before displaying the confirmation page:

orderWhereAmIGoing. This field is normally set to `../op/op_bcorderconfirm2.html`, the standard confirmation page. You can change this to call a custom page to display before order confirmation.

See “Defining Order Processing Options” on page 96.

Two settings in Order Control Maintenance determine whether buyers can add a new ship-to address or select a different address from a lookup on the confirmation page.

The following registry settings affect the display of this page:

useERPOrderNumber. 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 (7.1.24).

The generation of the order number occurs before the order is submitted to QAD EA.

Note The order prefix is determined by a setting in Order Control Maintenance.

paymentOptions. Specify the default payment method. Two options are currently supported:

- Credit Card
- Purchase Order

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.

See “Implementing Credit Card Processing” on page 122.

Note If the PO Required field is set to Yes for the customer record in QAD EA, entry of a PO number is also required during order-entry in QAD CSS.

showPartialShipper. 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. In the event of a partial shipment of a sales order paid for with a credit card, QAD EA will reauthorize the rest of the shipment.

showHeaderComments. This setting determines if a field displays so buyers can enter sales order header comments. This may be more applicable to B2B than B2C.

showOrderDetailInCheckOut. 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. This field is used with *showOrderDetailInCheckOut* to display the totals associated with the details.

quoteOrder. 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 QAD EA 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.

showShipper. This setting determines if the shipping method can be selected during order confirmation. The effect of this field depends on how the *shippingOptions* 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.

shippingOptions. This field determines the content of the drop-down list associated with the Shipping Method field in the Order Confirmation page. It can have either of the following 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 QAD EA

showReqDate. This field determines whether to display the request date in the order header

See page 81.

showLineReqDate. This field determines whether to display the request date for each order line item.

See page 81.

showPromDate. This field determines whether to display the promise date in the order header.

See page 81.

showLinePromDate. This field determines whether to display the promise date for each order line item.

See page 80.

Update Ship-To or Bill-To Address

If Add or Browse Ship-To is selected in Order Control Maintenance, buyers can add a new ship-to address by clicking the Add button or select a different ship-to from a list. The Update and Browse Bill-To settings have the same effects for bill-to addresses.

Figure 5.21 shows the page that displays when you click New for a ship-to address.

Fig. 5.21
Shipping Address Page

In this page and the Billing Address page, the following setting determines the default value for the country field:

defaultCountry. This setting defines the default country to use in address records. These must be valid country codes defined in QAD EA. The default is USA.

Order Summary

After an order is submitted, a summary page displays that the buyer can print if needed.

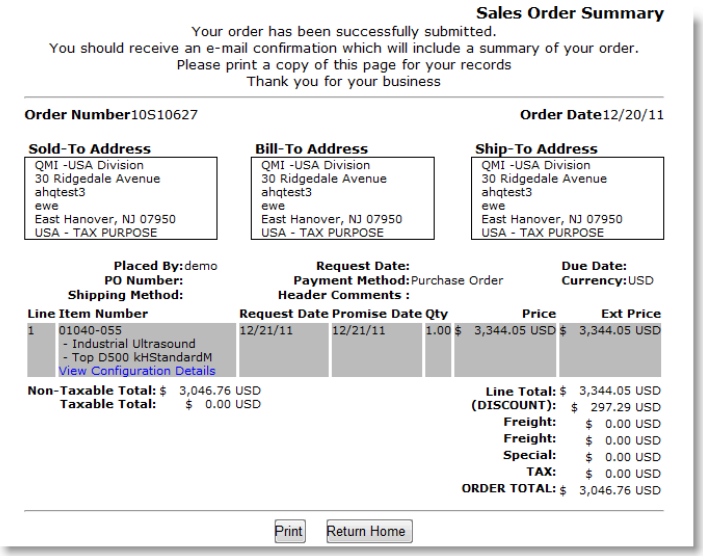
If you need to display an additional page with custom information when the payment method is Purchase Order, you can use the *showOrderSummary* registry setting. To implement this, you must set *showOrderSummary* to Yes and create a custom `orderinstructions.html` page to display before the standard order summary page.

See “Implementing Credit Card Processing” on page 122.

Note If you are using credit card processing, the online payment page displays at this point. Credit cards are typically used in a B2C scenario but can also be used in B2B.

Figure 5.22 displays the standard order summary page. For a Configurator-defined item, you can click View Configuration Details to see the item configuration.

Fig. 5.22
Order Summary



The following registry settings affect the display of this page:

showDueOrPromDate. This setting determines whether the sales order due date or promise date displays on the summary when *orderHeaderInfoLayout* is set to include the due date. Possible values are:

PromiseDate: The line item promise date displays. If request date is also included in the layout, the two dates display in the same column. The Due Date label is automatically changed to Promise Date.

Both: Both due and promise dates display.

None: Neither date displays.

Any other value displays the due date.

trailerAddress. 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 B2C and B2B environments, the two critical address are bill-to for account settlement and ship-to for logistics, taxes, and charges.

Example No,Yes,Yes omits the sold-to address and displays bill-to and ship-to addresses.

orderHeaderInfoLayout. 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 separated with the carat (^). Any of the following fields can be used: user_id, request_date, due_date, po, payment_method, currency, shipping_method, order_comments, and erp_order_number.

Example Enter the following to display these fields on three lines:

3,erp_order_number^user_id^request_date^due_date^po^payment_method^currency^shipping_method^order_comments

Do not include request_date unless either *showLineReqDate* or *showReqDate* is also set to Yes. Otherwise, no value exists for these fields.

orderHeaderInfoLayoutLabels. 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.

Example To specify labels for the data included in the previous example, enter the following:

EA Order Number^Placed By^Request Date^Due Date^PO Number^Payment Method^Currency^Shipping Method^Header Comments

Configuring Other Pages with Registry Settings

A number of other order-related functions can be configured using registry settings. This section discusses configuring:

- Contacts
- Order reports
- Order templates
- Order processing

Company Contact Page

When the user clicks the Contact Us menu button a page displays with company contact information. You can create this contact list in Contact Maintenance. If you do not do this, you can also use the default information set with the *defaultContactInfo* registry setting.

Figure 5.23 illustrates the contacts page using default information from the registry setting.

Fig. 5.23
Company Contacts

Order Reports

QAD CSS provides a number of reports that buyers can use to display information about their orders and order history. These are found on the Account Information menu.

One registry setting affects the following reports:

- Packing Slip Reprint Report
- Order Tracking Report
- Order Summary Report
- Order by Order Report
- Order by Item Report
- Invoice History Report

showDueOrPromDate. 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. Values are:

PromiseDate: Promise date displays.

Both: Both promise and due dates display.

None: No dates display.

(Any other value): Due date displays.

In the case of the Order by Item Report, when *showDueOrPromDate* is set to display the promise date, the report selection criteria is modified to not display Due Date From /To fields. Otherwise, the setting affects only the column heading and content in the various report output.

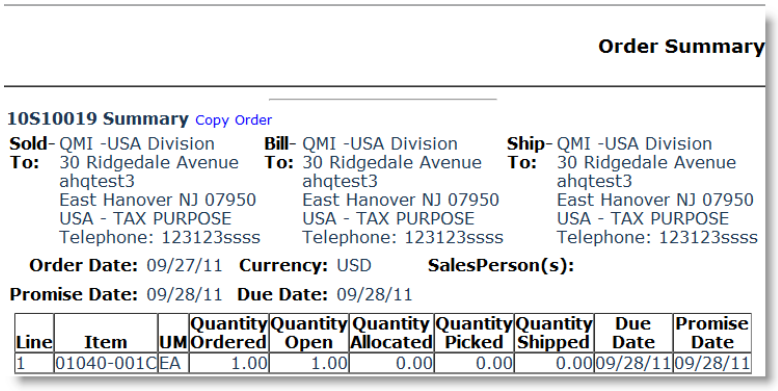
One additional registry setting can be used to configure the Order Summary report.

reportOrderCopy. This setting controls the display of a link that lets a buyer create a new order by copying an order 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.

Figure 5.24 illustrates the Order Summary report with the Copy Order link enabled and *showDueOrPromDate* set to display the due date.

Fig. 5.24
Order Summary Report



Order Summary

10S10019 Summary Copy Order

Sold- QMI -USA Division
To: 30 Ridgedale Avenue
ahqtest3
East Hanover NJ 07950
USA - TAX PURPOSE
Telephone: 123123ssss

Bill- QMI -USA Division
To: 30 Ridgedale Avenue
ahqtest3
East Hanover NJ 07950
USA - TAX PURPOSE
Telephone: 123123ssss

Ship- QMI -USA Division
To: 30 Ridgedale Avenue
ahqtest3
East Hanover NJ 07950
USA - TAX PURPOSE
Telephone: 123123ssss

Order Date: 09/27/11 **Currency:** USD **SalesPerson(s):**

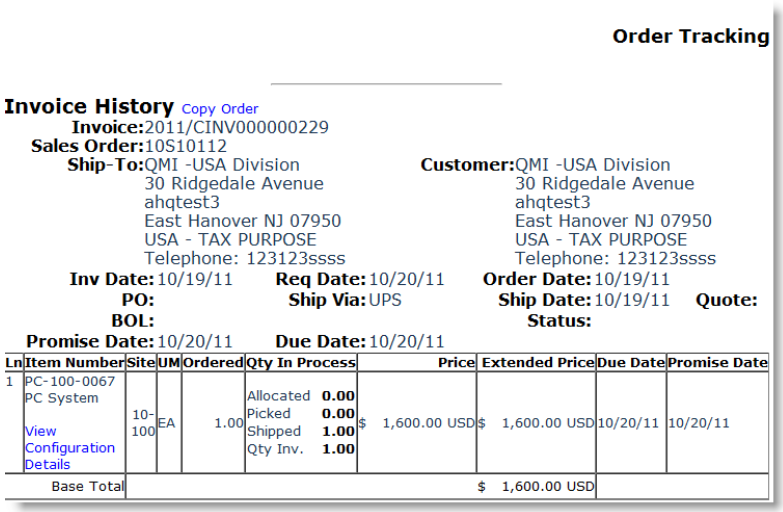
Promise Date: 09/28/11 **Due Date:** 09/28/11

Line	Item	UM	Quantity Ordered	Quantity Open	Quantity Allocated	Quantity Picked	Quantity Shipped	Due Date	Promise Date
1	01040-001C	EA	1.00	1.00	0.00	0.00	0.00	09/28/11	09/28/11

On the Order Tracking Report and the Internal Order Tracking Report, QAD CSS users can display the lot or serial number associated with each item shipped on an order by selecting the Show Lot/Serial Numbers Shipped check box. For lot/serial data to display, Lot/Serial Control must be set to either L for Lot or S for Serial in Item-Site Planning Maintenance (1.4.17) or Item Master Maintenance (1.4.1).

Figure 5.25 illustrates the Order Tracking Report with *showDueOrPromDate* set to display the promised date.

Fig. 5.25
Order Tracking Report



Order Tracking

Invoice History Copy Order
Invoice: 2011/CINV000000229
Sales Order: 10S10112
Ship-To: QMI -USA Division
30 Ridgedale Avenue
ahqtest3
East Hanover NJ 07950
USA - TAX PURPOSE
Telephone: 123123ssss

Customer: QMI -USA Division
30 Ridgedale Avenue
ahqtest3
East Hanover NJ 07950
USA - TAX PURPOSE
Telephone: 123123ssss

Inv Date: 10/19/11 **Req Date:** 10/20/11 **Order Date:** 10/19/11
PO: **Ship Via:** UPS **Ship Date:** 10/19/11 **Quote:**
BOL: **Status:**
Promise Date: 10/20/11 **Due Date:** 10/20/11

Ln	Item Number	Site	UM	Ordered	Qty In Process	Price	Extended Price	Due Date	Promise Date
1	PC-100-0067 PC System View Configuration Details	10-100	EA	1.00	Allocated 0.00 Picked 0.00 Shipped 1.00 Qty Inv. 1.00	$ 1,600.00 USD	$ 1,600.00 USD	10/20/11	10/20/11
	Base Total						$ 1,600.00 USD		

For configurable items that are defined with QAD Configurator, you can use the field *Include Configuration Details* to determine if configuration details will be included in the following reports:

- Order Tracking Report
- Order Summary Report

- Order by Order Report
- Order by Item Report
- Invoice History Report
- Packing Slip Reprint
- Order Purchase Report

  Note Only after you select *Show Order Detail* can you select *Include Configuration Details*.
- Order by Customer Report

  Note Only after you select *Show Details* can you select *Include Configuration Details*.

As an example, Figure 5.26 illustrates the field *Include Configuration Details* in the Order Tracking Report.

- If the field is selected, configurations details are shown in the report; see Figure 5.27.
- If the field is not selected, there is just a hyperlink View Configuration Details in the report; see Figure 5.28.

Fig. 5.26
Include Configuration Details

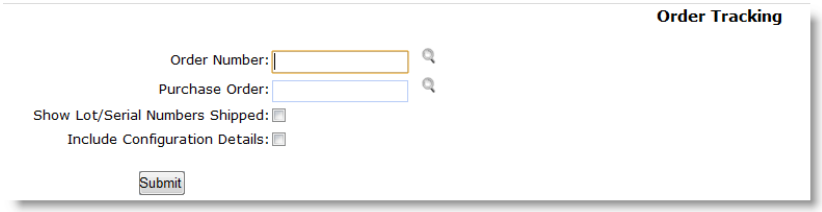


Fig. 5.27
Configuration Details Included in Reports

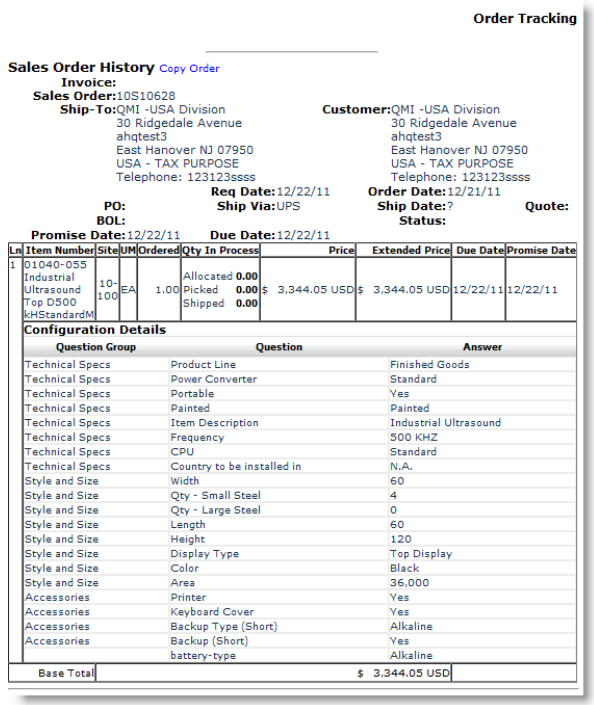
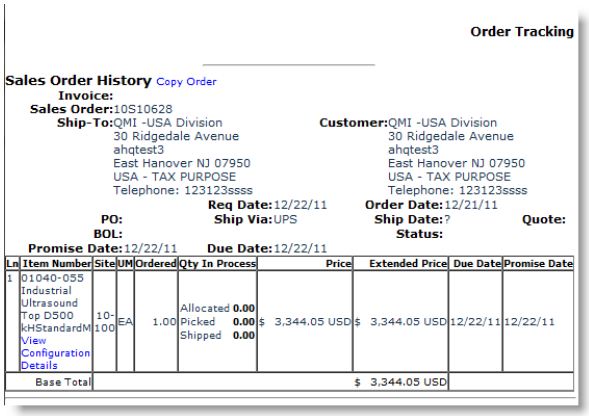


Fig. 5.28
View Configuration Detail Hyperlink in Reports



Order Tracking

Sales Order History Copy Order
Invoice:
Sales Order: 10S10628
Ship-To: QMI -USA Division
30 Ridgedale Avenue
ahqtest3
East Hanover NJ 07950
USA - TAX PURPOSE
Telephone: 123123ssss

Customer: QMI -USA Division
30 Ridgedale Avenue
ahqtest3
East Hanover NJ 07950
USA - TAX PURPOSE
Telephone: 123123ssss

Req Date: 12/22/11 **Order Date:** 12/21/11
PO: **Ship Via:** UPS **Ship Date:** ? **Quote:**
BOL: **Status:**
Promise Date: 12/22/11 **Due Date:** 12/22/11

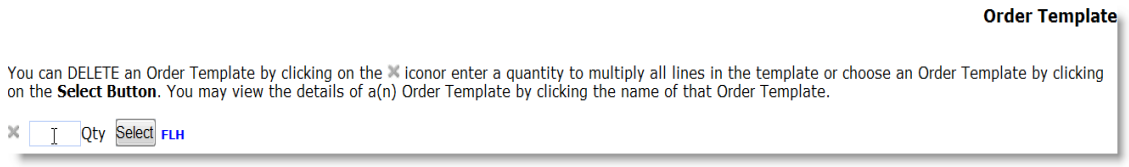
Ln	Item Number	Site	UM	Ordered	Qty In Process	Price	Extended Price	Due Date	Promise Date
1	01040-055 Industrial Ultrasound Top D500 kHStandardM View Configuration Details	10-100	EA	1.00	Allocated 0.00 Picked 0.00 Shipped 0.00	$ 3,344.05 USD	$ 3,344.05 USD	12/22/11	12/22/11
Base Total							$ 3,344.05 USD		

Order Template

When *templateOrder* is Yes, a link to a page for selecting order templates displays on the OE1 and OE2 home pages.

Clicking this link displays a page like the one in Figure 5.29.

Fig. 5.29
Order Templates



Order Template

You can DELETE an Order Template by clicking on the ✖ iconor enter a quantity to multiply all lines in the template or choose an Order Template by clicking on the **Select Button**. You may view the details of a(n) Order Template by clicking the name of that Order Template.

✖ Qty Select FLH

One registry setting affects this page:

useTemplateQty. 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.

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.

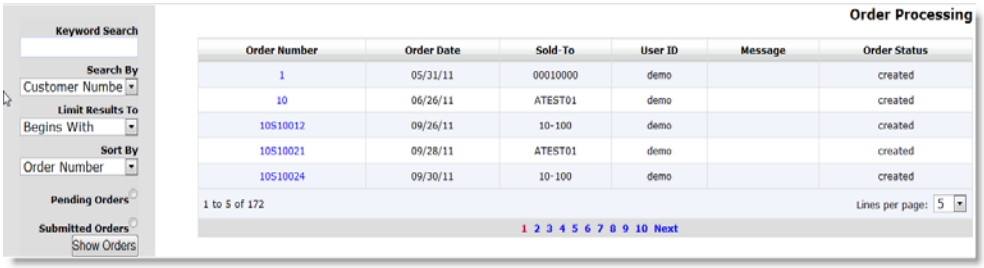
Order Processing

See page 139.

The Order Processing function can be invoked as a stand-alone option from the menu or as part of B2C Maintenance. In a B2C implementation, this function lets a CSR review orders before they are submitted based on the *autoExtendNewCustomer* setting.

In Order Control Maintenance, if Post to QAD Core is set to No, the order is retained in QAD CSS and must be reviewed and then submitted using Order Processing.

Fig. 5.30
Order Processing



One registry setting affects this page:

showOProcStatus. When this is Yes, two radio buttons display for searching for pending or submitted orders. Pending orders exist in QAD CSS only; their status displays as created. After they have been reviewed and submitted, they are deleted from QAD CSS and exist only in QAD EA. The status of these orders is submitted.

Offering the choice of viewing orders by status only makes sense when *autoExtendNewCustomer* is No or Post to QAD Core is No in Order Control Maintenance; otherwise, orders with a pending status are never created.

Configuring Order Entry with Admin Functions

The following administrative functions have special significance during implementation of order processing:

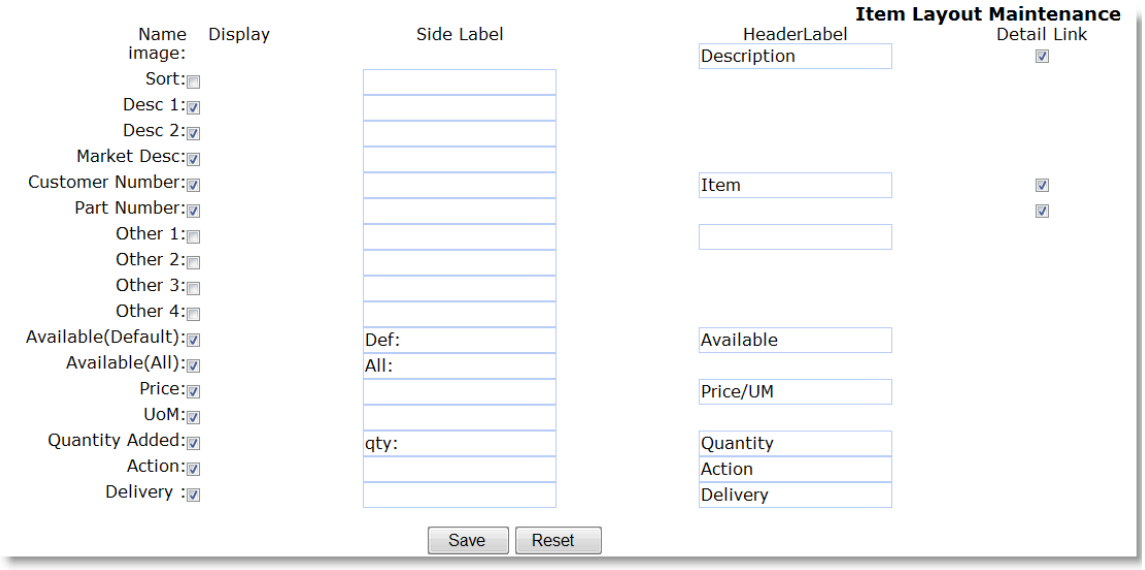
- Use Item Layout Maintenance to control the arrangement of item information in the item catalog.
- Use Order Control Maintenance to configure general order processing functions that affect the entire system.
- Use Item Types Maintenance to create and modify item categories and associate images with them.
- Use Specials Maintenance to add information in the OE2 page related to special promotions you are running.

Note The information defined in Item Types Maintenance and Specials Maintenance is specific to items in a particular domain.

Specifying Item Layout

Item Layout Maintenance on the Administration menu lets you determine which product details are displayed in the catalog. You can determine the pictures, descriptive text, pricing, reference, and indexing that display with each of the items you sell.

Fig. 5.31
Item Layout Maintenance



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. Text in this column displays in the item rows in the catalog.

Header Label. Text in this column displays as column headings in the 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.

See “Catalog Settings” on page 72.

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.

The fields being managed through Item Layout Maintenance correspond to fields loaded using the Catalog Load function. Most of these fields correspond directly to the label on the screen. However, some are calculated directly from QAD EA and some are custom fields that only have values if you have loaded information.

Table 5.2
Item Fields in Item Layout Maintenance

Label	wpro_cust_item Field	Note
Sort	sort_name	Read directly from QAD CSS table.
Desc 1	item_description[1]	Read directly from QAD CSS table.
Desc 2	item_description[2]	Read directly from QAD CSS table.
Market Desc	item_market_desc	Read directly from QAD CSS table.
Customer Number	cust_part	Read directly from QAD CSS table.

Label	wpro_cust_item Field	Note
Part Number	item_number	Read directly from QAD CSS table.
Other 1	ex_char1	Custom character field for implementation-specific use.
Other 2	ex_char2	Custom character field for implementation-specific use.
Other 3	ex_dec1	Custom decimal field for implementation-specific use.
Other 4	ex_int1	Custom integer field for implementation-specific use.
Available (Default)		Calculated from QAD EA or QAD CSS based on setting of *runGetDefWhseQty*.
Available (All)		Calculated from QAD EA or QAD CSS based on setting of *runGetAllWhseQty*.
Price		Calculated from QAD EA based on the registry settings *runGetBestPrice* and *runGetBestPriceConfigParts*.
UoM	um	Read directly from QAD CSS table.
Quantity Added	minQty	Read directly from QAD CSS table.
Icon Add		Displays ADD button as image `add_to_cart_light.gif`.

Defining Categories

You use Item Types Maintenance to configure the categories you use for grouping the display of items during order entry. The basic categories are typically created during the Catalog Load. However, you may need to define additional information using Item Types Maintenance.

The most likely reason for using this function is to add images and image- related information. Each top-level category, as well as each lower-level category, can have an associated image. These images display only in order entry 2.

Generally, your categories are available for all customers. However, if you have some customers who cannot order any items in a specific category, you can control the display of the category itself by setting up customer-specific records.

As categories are created during the catalog load, the category records are created with the customer associated with the item in the CSV file, or with a blank customer value if none is specified.

Defining Order Processing Options

Order Control Maintenance on the Administration|System Control menu includes fields that let you configure the order process based on your business requirements. Table 5.3 summarizes these options and notes points to consider when determining how to configure them.

Table 5.3
Order Processing Options

Option	Comments
Order Prefix	Specify a prefix for the sales order number. By using a different prefix than the one specified in Sales Order Control (7.1.24), you can easily identify orders that were placed using QAD CSS.
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 login to resume where they were interrupted, or to begin a new order session.
Archive Orders	When this is Yes, the system keeps a copy of every order in a side table within QAD CSS after it is communicated to QAD EA.
Archive Incomplete Orders	When this is Yes, the system archives even those orders that were not completed. By default, none of these orders will be in QAD EA.
Credit Notify at Startup Credit Notify on Enter Credit Notify on Submit	The system can notify a customer with a message that they are on credit hold according to QAD EA. You need to specify the text that displays for this message. This notification can occur at any combination of three times: • Immediately after logging in as a customer • When the customer chooses the order entry option • When they submit the order
Post Order When on Credit Hold	This setting determines if the order is posted to QAD EA even when the account is on credit hold.
Add Ship-To Browse Ship-To	These settings determine if buyers can add a new ship-to address or select a different ship-to address from a list during order entry.
Update, Browse Bill-To	These settings determine if buyers can update or browse bill-to addresses during order entry.
Post to QAD Core	This setting determines if orders are immediately posted to QAD EA after they are entered by the buyer. • If the setting is Yes, the orders are immediately posted to QAD EA. • If the setting is No, a CSR must use Order Processing to review and then submit the pending orders. To notify the CSR about the pending orders, custom programming is needed to store appropriate e-mail addresses in QAD EA. The QAD CSS system provides an e-mail event (EX073) for your custom programming. For more information about the e-mail event EX073, see page 145.

Creating Hyperlinks to Carriers

You can use Carrier Href Maintenance to specify URLs associated with shipping carrier Web sites such as UPS or FedEx. Active links in the Order Tracking Report let buyers view the shipping status of their orders.

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, make sure that the Ship Via field is populated during order entry.

Defining Specials

Specials (often referred to as promotions) are groups of items you want to feature to customers when they visit your site. Specials are optional and apply to order entry 2 only. Specials can be selectively offered to specific marketing groups and have specific start and end dates.

Note Specials are defined separately for each domain.

You define specials in Specials Maintenance. When you set up a special, you give it an ID and optionally associate it with a marketing group; if no group is specified, the special can be viewed by all users of your site. You also specify when the special starts and ends, and optionally, the time of day it runs.

You then select the items to be part of the special and supply the text and images that display on the order entry 2 page. The short and long description of the special can include HTML code so you can format the information to suit your marketing requirements. If you have multiple specials that apply to an item, you can determine the order in which they display.

Note The product group referred to in this function is actually the product category, which corresponds to Code 0–5 as specified in Item Types Maintenance. The special information displays next to this category description on the OE2 page.

Order Entry with Optional Features in QAD EA

Many optional features in QAD EA affect the maintenance of sales orders. The following optional features add additional fields, frames, and pop-ups to Sales Order Maintenance (7.1.1) when they are enabled:

- Logistics Accounting
- Customer Consignment Inventory
- Container and Line Charges
- Shipment Performance
- ATP Enforcement

If you have enabled any of these features and the item or customer on an order loaded from QAD CSS meets the conditions you have set up, you must ensure that proper default values are defined for additional fields and pop-ups that display. Otherwise, the order may fail to be loaded.

Important When Shipment Performance is being used, the Category field in Sales Order Maintenance has special significance. Orders created in QAD CSS are always loaded in QAD EA with a blank value for category. Make sure that blank is a valid value if you have defined generalized codes for this field.

Other options such as the following modify the defaulting logic and background calculations that affect existing fields in a sales order:

- Customer Reserved Locations
- Delivery Transit Time and Promise Dates

When you have defined reserved locations for a customer, special defaulting logic is used to determine the inventory location for issuing items on the sales order. This same logic applies to an order created in QAD EA or one loaded from QAD CSS without the need for any special setup.

If you are using delivery transit times to calculate promise dates in QAD EA or if you have enabled ATP enforcement for items available from the QAD CSS catalog, you have several ways of implementing related features in QAD CSS.

Using a combination of registry settings in QAD CSS, you can take advantage of ATP calculations to let shoppers know whether inventory is available to fill their orders before the order is submitted. You can also use some of these features even when standard QOH calculations are being used, rather than ATP enforcement.

Normally ATP enforcement applies to confirmed orders only. However, in QAD CSS, you can use ATP calculations even when orders are unconfirmed. The *confirmedOrders* registry setting in QAD CSS controls whether orders are loaded into QAD EA as confirmed or unconfirmed.

Note The nature of a Web-based order-entry system assumes that orders are typically entered as confirmed. Otherwise, separate confirmation processes must take place in QAD EA that can change aspects of the order. These changes would need to be communicated to the shopper, adding unwelcome overhead to the order-entry experience.

ATP is the quantity of uncommitted inventory and planned production at a specific site that will be available to fill an order line on a specified due date. ATP calculations always use the default order site, determined by the following search order and logic:

- The system searches first for a site associated with the customer record in QAD CSS.
- If the customer in QAD CSS does not have an associated site, the site defined in QAD CSS Order Control Maintenance is used.
- If a site is not found in QAD CSS, the site defined in Customer Data Maintenance in QAD EA is used to populate the sales order header.
- If the line item does not exist at the default header site, the system looks for the site associated with the item in Item Master Maintenance (1.4.1).

The following sections discuss these topics in detail and provide sample scenarios.

Managing Dates During Order Entry

Your QAD CSS system can interact with three dates associated with a sales order in QAD EA:

Required Date. This is the date the shopper wants to have the items. If not specified, it is assumed to be the earliest possible date, which is today. In QAD CSS, this date is referred to as the *request date*.

Due Date. This is the date the order will be ready to ship from your shipping dock. In QAD EA, the system calculates the default due date by adding the shipping lead time from Sales Order Control (7.1.24) to the order date. Due date is an important factor in many internal calculations such as Material Requirements Planning (MRP). In QAD CSS, this date is also referred to as the *ship date*.

Promise Date. This is the date that items are expected to arrive at the shopper's location. This date can be calculated when Calculate Promise Date is Yes in Sales Order Control and data has been defined in Delivery Transit Time Maintenance (2.16.1).

When you design your QAD CSS order-entry system, you can determine which dates display using system registry settings. Typically—since due dates drive internal QAD EA processing—only request and promise dates are of interest to shoppers.

However, to use promise dates, you must ensure that you have the proper setup in QAD EA to support them:

- Define delivery transit times in Delivery Transit Time Maintenance (2.16.1). These times can vary by city, state, and country. To avoid creating many detailed records, set up generic records that apply, for example, to the US as a whole.
- Set Calculate Promise Date to Yes in Sales Order Control (7.1.24).

Note If you enable the promise date registry settings in QAD CSS without the corresponding setup in QAD EA, no dates will display.

You can also choose whether date fields are set and display for an entire order or whether they can be modified or display for each line on the order. Finally, you can have the request date set by default to the promise date.

Setting a default value for the request date streamlines order entry for the shopper, since the shopping cart displays with both request and promise date set to earliest possible dates for the requested quantity. The shopper only needs to click Check Out to complete the order.

Note Request date can be modified by shoppers; promise date is calculated and displayed only.

To let users request information about delivery or due dates before submitting an order, you use another setting—*showDeliveryIcon*. When this setting is Yes, an icon displays on the product catalog, Express Order cart, and shopping cart pages. Clicking the icon causes the system to display a message regarding availability.

Table 5.4 lists the various settings that you use to manage dates and let users display date-related information.

Table 5.4
Date-Related System Registry Settings

Setting	Usage
showDeliveryIcon	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.
showDueOrPromDate	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.
showPromDate	This setting determines whether the promise date displays 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 *showLinePromDate* to Yes. **Note**: Promise dates are calculated and displayed by the system; they cannot be updated directly.
showLinePromDate	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.
showReqDate	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 *showLineReqDate* 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 *showLineReqDate* to Yes. When *showReqDate* and *showLineReqDate* are both Yes, an Apply All button displays beside the header Request Date field. This lets users apply the header request date to all order lines.

Setting	Usage
showLineReqDate	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. *showReqDate* is typically Yes in this case. • Yes: Line item request dates are entered. The *showReqDate* field is typically set to No. However, when both *showReqDate* and *showLineReqDate* are Yes, an Apply All button displays beside the header Request Date field. This lets users apply the header date to all order lines. • Required: Same as Yes but input of the field is mandatory during order entry.
setReqDate	This setting determines the default value of the request date on the Shopping Cart page. The options are: • Yes: Order line request date defaults from the system calculated date. • No: Order line request dates are blank.

Using ATP Calculations

There are two methods of calculating availability:

- Standard quantity on hand calculation
- Expanded available-to-promise calculation based on control settings and item setup

If you have done the setup required for ATP enforcement calculations, QAD CSS determines quantities by executing the same ATP calculations that occur in ATP Enforcement Check (7.1.19.2). ATP applies when:

- ATP Enforcement Enabled is Yes in Sales Order Control (7.1.24).
- ATP Enforcement Level is Warning or Error for the item/site combination in Item-Site Planning Maintenance (1.4.17) or for the item in Item Master Maintenance (1.4.1).

Note Regardless of the setting of ATP Enforcement Enabled, standard calculations are always used to determine quantities for configured items, family items, and for items in an Enterprise Material Transfer (EMT) transaction.

ATP calculations in QAD CSS also use the value of ATP Horizon in Sales Order Control. If no inventory is available to promise within the ATP horizon, the system selects the day after the horizon as the first available due date.

Note ATP check is not available for configurable items defined with QAD Configurator.

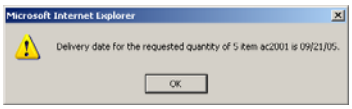
Displaying Date-Related Information

When a shopper clicks the Delivery button, the system returns one of three possible messages about item availability based on either the standard or ATP calculation method:

- A message indicating the ship date—when Calculate Promise Date is No—or delivery date—when Calculate Promise Date is Yes
- A message indicating the maximum quantity that could be delivered on the ship or delivery date for partial availability
- A message indicated no availability

In Figure 5.32, Calculate Delivery Date is set to Yes and the message indicates a delivery date rather than ship date.

Fig. 5.32
Sample Message



Message content is affected by whether the QAD CSS registry setting for *confirmedOrders* is Yes and whether you are on the shopping cart page or a different page. If the order is submitted unconfirmed (that is, *confirmedOrders* is set to No), the messages indicate that this is an estimated date. Instead of stating that items can be delivered *on* a particular date, the message states they can be delivered *around* that date.

Table 5.5 lists the messages that display when *confirmedOrders* is Yes.

Table 5.5
Availability Messages

Calculation Method	Calculate Promise Date	Date Used	Possible Message
Standard	No	Due Date xx/xx/xx Req Date yy/yy/yy	**Ship** date for the requested quantity of # item xxx is xx/xx/xx. A maximum quantity of # item xxx can be **shipped** on yy/yy/yy. Please contact Customer Service for further information. This item is currently not available. Please contact Customer Service for further information.
Standard	Yes	Promise Date xx/xx/xx Req Date yy/yy/yy	**Delivery** date for the requested quantity of # item xxx is xx/xx/xx. A maximum quantity of # item xxx can be **delivered** on yy/yy/yy. Please contact Customer Service for further information. This item is currently not available. Please contact Customer Service for further information.

Calculation Method	Calculate Promise Date	Date Used	Possible Message
ATP	No	Due Date xx/xx/xx Req Date yy/yy/yy	**Ship** date for the requested quantity of # item xxx is xx/xx/xx. **Ship** date for the requested quantity of # item xxx is xx/xx/xx. A maximum quantity of # item xxx can be **shipped** on yy/yy/yy. Please contact Customer Service for further information. **Ship** date for the requested quantity of # item xxx is xx/xx/xx. Items are not available before yy/yy/yy.
ATP	Yes	Promise Date xx/xx/xx Req Date yy/yy/yy	**Delivery** date for the requested quantity of # item xxx is xx/xx/xx. **Delivery** date for the requested quantity of # item xxx is xx/xx/xx. A maximum quantity of # item xxx can be **delivered** on yy/yy/yy. Please contact Customer Service for further information. **Delivery** date for the requested quantity of # item xxx is xx/xx/xx. Items are not available before yy/yy/yy.

ATP Enforcement

When you have enabled ATP enforcement and defined ATP enforcement levels in QAD EA, QAD CSS recognizes those levels and appropriately creates errors or warnings when shoppers submit orders that cannot be fulfilled on the due or promise date.

ATP enforcement logic executes when a shopper displays the shopping cart or clicks Submit Order on the Finish Order page. The system determines the ATP enforcement level for the item based on how it is set up in Item-Site Planning Maintenance (1.4.17) or, if not defined there, in Item Master Maintenance (1.4.1) and proceeds accordingly.

- When level is None, the shopper can submit the order regardless of availability.
- When level is Warning, a warning message displays, but the shopper can submit the order.
- When level is Error, an error message displays, the Check Out button is disabled, and the order cannot be submitted.

The same ATP enforcement validation occurs again during the order transmission to QAD EA, in case quantities have changed in the QAD EA database. If warnings and errors occur, an e-mail event is generated to the Customer Service Representative (CSR). When enforcement level is error, the order fails to load and is not created in QAD EA.

Using ATP Settings to Process an Order

This section illustrates how the shopper would place an order when you have enabled the various date and ATP settings discussed in previous sections.

Recommended ATP Settings

QAD CSS offers implementers a number of choices regarding the way dates and quantities are displayed and calculated. Not all combinations of settings are sensible design choices, however.

Table 5.6 and Table 5.7 illustrate how you would set up QAD EA and QAD CSS to take maximum advantage of ATP calculations.

Table 5.6
Recommended QAD EA Setup for ATP

QAD EA Program	Setting	Value	Comment
Sales Order Control (7.1.24)	ATP Enforcement Enabled	Yes	Setting this to Yes enables more advanced features and control in QAD CSS.
	ATP Horizon	60	This will vary based on your own business requirements, but is typically one to two months long.
	Calculate Promise Date	Yes	Since Promise Dates have more meaning to external users than due dates, it is recommended to set this to Yes.
Item Master Maintenance (1.4.1)	ATP Enforcement Level	Error	You do not typically want to allow shoppers to order items that you cannot provide. Using the other registry settings in QAD CSS, you can let the shopper find a delivery date that will not produce an error.
Delivery Transit Time Maintenance (2.16.1)	At least one generic record	Varies	Depending on your shipping methods, you should set up at least one record. For example, you can set up a value of 5 days for shipments from your warehouse to anywhere in the US. If you have more detailed information about variations in ship time, you can create more detailed records.

Table 5.7
Recommended QAD CSS Registry Settings for ATP

Setting	Value	Comment
showDeliveryIcon	Yes	This lets shoppers access ATP information.
showDueOrPromDate	Promise Date	Typically, this is the only date of interest to external shoppers (affects order summary).
showPromDate	Yes	Typically, this is the only date of interest to external shoppers (affects shopping cart and order summary).
showLinePromDate	Yes	This provides more detail to the shopper so they know which items on a multi-item order have the longest lead time.
showReqDate	Yes	This lets users change the parameters of the ATP

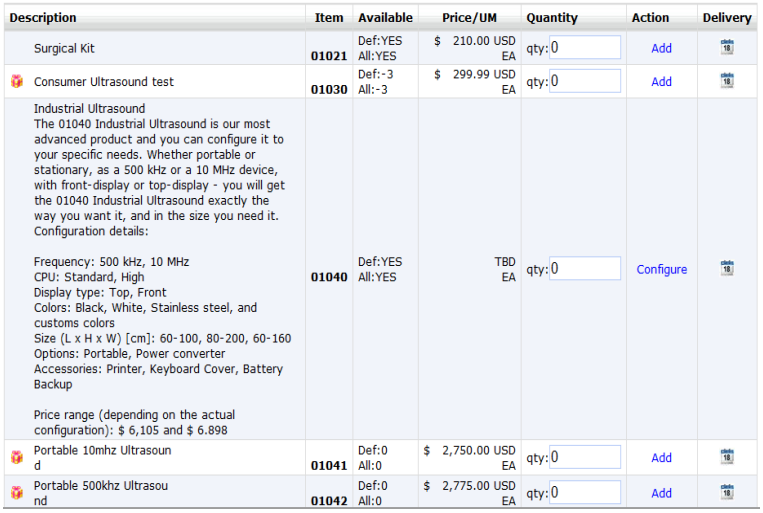
Setting	Value	Comment
showLineReqDate	Required	This gives shoppers more control over the detail of ATP calculations and requires an entry.
setReqDate	Yes	When dates are required, this ensures that a default is always calculated and set. Even if showLineReqDate is not set to Required, setting setReqDate to Yes streamlines order entry.
runGetDefWhseQty	Yes	ATP only works with the default site, so displaying any other quantity in the product catalog would be misleading.
runGetAllWhseQty	No	This quantity is not relevant to ATP.

In addition, you should leave the default site blank for the customer records in QAD CSS and in Order Control Maintenance.

Product Catalog

Figure 5.33 illustrates the product catalog with ATP settings enabled.

Fig. 5.33
Catalog with Delivery Button



See “Inventory Availability Settings” on page 75.

The Available column can be displayed or hidden based on settings in Item Layout Maintenance. It displays the QOH based on applicable registry settings. This can be either the quantity available or a message indicating availability or out of stock. Both values can be displayed for the default site as well as for all sites in QAD EA.

Important ATP calculation is based on the default site; when ATP is enabled in QAD CSS, the Available column should be set to display the quantity in the default site only.

The shopper can use the catalog to check the earliest delivery date of an item before submitting the order to the shopping cart. To do this, the shopper enters the requested quantity into the Quantity column for a specific item and clicks the Delivery button. The system then calculates the earliest delivery date—due or promise date, based on settings—with the assumption that the customer is requesting the items as soon as possible; that is, the request date is today.

The following two scenarios assume that ATP enforcement has been enabled and orders are being entered as confirmed.

Sample Scenario: Sufficient Quantity

The shopper wants 500 item AC001 today (08/31/05). A sufficient quantity on hand exists. Shipping lead time is set to 0 days in QAD EA.

When Calculate Promise Date is No, the system displays:

```
Ship date for the requested quantity of 500 item AC001 is
08/31/2005
```

When Calculate Promise Date is Yes and transit days is set to 2, the system displays:

```
Delivery date for the requested quantity of 500 item AC001 is 09/02/2005
```

Sample Scenario: Insufficient Quantity

The shopper wants 500 item AC001 today (08/31/05), but a sufficient quantity is not available. Shipping lead time is set to 0 days in QAD EA. ATP Horizon is 30 days.

When Calculate Promise Date is No, the system displays:

```
A maximum quantity of 50 item AC001 can be shipped on
09/03/2005. Please contact Customer Service for further information

The total quantity can be shipped 10/04/05
```

When Calculate Promise Date is Yes, ATP Horizon days is 30, and transit days is set to 2, the system displays:

```
A maximum quantity of 50 item AC001 can be delivered on
09/05/2005. Please contact Customer Service for further information

The total quantity can be delivered on 10/06/05
```

Note Because the ATP horizon is set at 30 days, the system selects the day after the horizon as the first available due date.

Shopping Cart

When *setReqDate* is Yes, the shopping cart initially displays the ordered line items with the request date and promise date both set to the earliest delivery (or shipment) date for the requested quantity. If this is acceptable, the shopper can simply click Check Out to complete the order.

QAD CSS validates that line items conform to the defined ATP enforcement levels when the shopping cart page opens. If they do not, warnings and errors display. When errors occur, the Check Out button is disabled; errors must be corrected before the shopper can continue. Shoppers can continue with the check out when warnings exist, but only after responding Yes when prompted to confirm their action.

If the shopper is not satisfied with the presented delivery date, adjustments can be made by entering either a new request date or a different quantity and clicking the Delivery button for the line item.

The shopper can request the items on an earlier date and see if a smaller quantity is available, or decrease the quantity and see if the items will arrive sooner.

QAD CSS then displays a message such as:

```
A maximum quantity of 1 item AC2003 can be delivered on 09/02/2005. Accept?
```

Clicking Accept changes the quantity. In this example, the quantity would be changed from 3 to 1.

The shopper can also set the Request Date for all line items by entering a Request Date on the header and clicking the Apply All button. This is useful when an order has many lines and the items are not needed as soon as possible, but at a specific date in the future.

When the shopper completes activities on the shopping cart page and clicks Check Out, QAD CSS validates that line items conform with the defined ATP enforcement levels.

The shopper can leave the shopping cart and go to the Finish Order page only when no more errors display.

Cross-Sell, Up-Sell, and Replacement Items

In the shopping cart page, you may see a question mark icon displaying next to an item indicating that there is more information available for that item that requires your attention. Move your mouse pointer over the icon to view a brief attention message. It could be regarding one of the following:

- Cross-sell item

  Cross-sell items are items you are offered to buy in addition to the item being ordered. Click the question mark icon to view a list of available cross-sell items in a pop-up window. You can then add them to your shopping cart or click Cancel to close the window.

- Replacement item

  Replacement items are substitute items to replace the item you are ordering since the item being ordered is no longer available. Click the question mark icon to view detailed item replacement information. Then, click OK to accept the replacement or Cancel to remove the item from your shopping cart.

- Up-sell item

  Up-sell items are replacement items or assemblies that are an upgrade or a level above the requested item in the item’s product structure when the requested item is not available during order entry. Click the question mark icon to view the detailed up-sell item information in a pop-up window. You can then choose to purchase the up-sell item instead or remove the item being ordered from the shopping cart.

Before you can proceed to check out, you are required to view all attention messages and clear all question mark icons.

Memo Type Items

In the shopping cart page, you may see an exclamation point icon displaying next to an item indicating that this is a memo type item. Memo items have no effect on inventory or MRP when they are placed on an order.

You can use the *AlertMemo* registry setting to determine whether to flag memo type items on the order entry page.

Finish Order

The Finish Order page shows the final order with request and promise dates as entered in the shopping cart.

When the shopper clicks Submit Order, the order data is loaded into QAD EA. If the load fails based on ATP errors caused by changes in QAD EA between check out of the shopping cart and the actual order submission, an e-mail notification is send to the CSR. The CSR must then contact the shopper and let them know the quantity cannot be shipped (delivered) on the requested date.

Using Order Upload

By using the Order Upload function under the Order Menu, you can load existing sales orders from XML files into QAD CSS.

The system provides a template XML file for you. To get your own XML file, you modify the template:

1. Get a copy of the template file `op_loadorder_template.xml` under the CSS installation directory `qadcss\tools`.
2. Specify the sales order number and other information in the XML file.

Note Make sure that you specify the sales order number in the XML file, as there is no mechanism to retrieve the sales order number from QAD EA.

Note Even though the template XML file includes the price and price list fields, you cannot specify pricing for an order; the system calculates the price through best pricing.

Here is an example of the modified XML file.

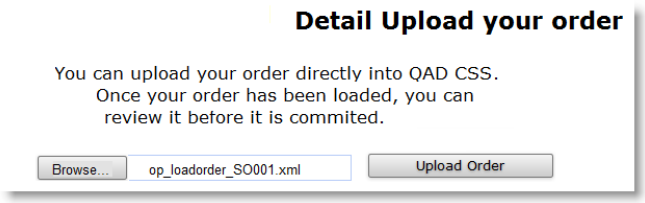
```
<xml version="1.0" encoding="UTF-8">
<xmlOrderHeader>
<soldTo>10-100</soldTo>
<billTo>10-100</billTo>
<shipTo>10-100</shipTo>
<orderNumber>cssso001</orderNumber>
<po>csspo001</po>
<carrier>UPS</carrier>
<currency>USD</currency>
<dueDate>2014/02/01</dueDate>
<orderDate>2014/01/28</orderDate>
<requestDate>2014/01/28</requestDate>
<orderComments/>
<orderPaymentMethod>1</orderPaymentMethod>
<postmfgpro>yes</postmfgpro>
<submitconfirmed>yes</submitconfirmed>

<CustomerOrderLine>
   <orderNumber>cssso001</orderNumber>
   <lineNumber>1</lineNumber>
   <itemNumber>01010</itemNumber>
   <custPart/>
   <quantity>10</quantity>
   <price></price>
   <priceList/>
   <site>10-100</site>
   <uom>ea</uom>
   <lotserial/>
   <dueDate>2014/02/01</dueDate>
   <requestDate>2014/01/28</requestDate>
   <lineComments/>
</CustomerOrderLine>
</xmlOrderHeader>
```

Note One XML file can contain multiple order lines in a sales order.

When you have your XML file ready, you can upload the XML file to load the sales order into the CSS system.

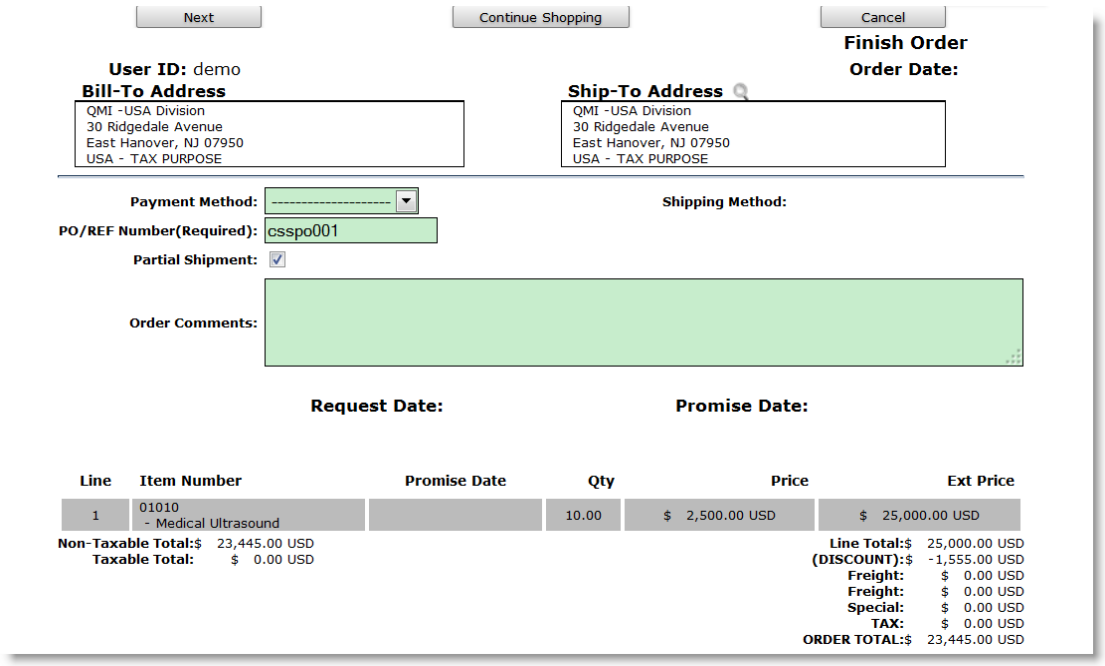
1. In QAD CSS, go to Home|Order Menu|Order Upload.
2. Select your XML file and click Upload Order.

Fig. 5.34
Uploading Order



Then you can see the Finish Order page and review the details of the uploaded order.

Fig. 5.35
Order Details



Note The function Order Upload is not compatible with ATP, as there is no way to update a date for an item if it is not available during the uploading.

Chapter 6

B2C Order Processing

This chapter describes how to set up QAD CSS in a business-to-customer scenario.

Overview of B2C Implementation 114
Describes some characteristics of B2C and outlines the B2C processing flow.

Managing Users in B2C 115
Discusses registry settings affecting users, setting up the default B2C user, setting up pricing and tax calculations, and the My Account page.

Implementing Credit Card Processing 122
Discusses implementation strategy, how to set up credit card data, and manage credit card orders in QAD EA.

Managing the Order Process 133
Explains how to extend orders to QAD EA and other B2C order-processing settings.

Order Processing Examples 134
Gives examples of order processing, including submitting orders immediately and reviewing orders before submitting.

Overview of B2C Implementation

Many aspects of a B2C implementation are exactly the same as a B2B implementation. For example, you must design the item catalog, load items from QAD EA, customize the appearance of the UI to accommodate your corporate look and feel, and set up company contacts and e-mail events.

Characteristics of B2C

Certain key areas are fundamentally different between B2B and B2C order processing and require different setup and implementation activities.

- In B2C, buyers do not initially log in to the system. They can browse the catalog and only need to establish an identity when they are about to place an order.
- Because users do not have a known identity, security must be handled differently.
- Since order and address information is being input by external users who may be unfamiliar with your system, you may want to review the orders before creating customer records and sales orders in QAD EA.
- B2C users typically pay for items using credit cards. If you plan to support credit card processing, you must complete the required planning and setup steps.

In addition to accounting for these differences between B2B and B2C, you also must make some choices during implementation about aspects of B2C order processing that are managed through B2C system registry settings.

Note Before attempting to implement B2C, make sure you have activated the procedures used in the B2C and credit card (CC) modules. You do this in Administration|System Control|Super Layer Maintenance by setting Load on Start to Yes for the procedures in these two modules. These are not activated by default since the B2C and CC modules are optional.

B2C Processing Flow

The general flow of information in a B2C scenario is as follows:

1. A shopper comes to the site and is able to view the catalog of items without logging in.
2. The shopper selects items and puts them in the shopping cart, then clicks Check Out.
3. The shopper must then either log in or create an account by specifying address and other account details so the system can create a valid user record.
4. Based on this address information, the system prices and calculates taxes in the background by creating a sales quote in QAD EA using a temporary ship-to address associated with a special B2C customer in QAD EA.
5. The shopper confirms the sale and is prompted for credit card information (if you have also implemented the Credit Card module).

See “Extending Orders to QAD EA” on page 133.

6 Based on a registry setting (*autoExtendNewCustomer*), two steps may follow during customer creation:

   a When *autoExtendNewCustomer* is True, the sales order is loaded into QAD EA and a new customer record is created for the user if necessary. The user record in QAD CSS is updated with the association to the new customer record. The credit card information is sent to the processing partner for authorization and then the authorized amount is captured.

   b When *autoExtendNewCustomer* is False, the sales order is saved in QAD CSS. An internal customer service representative (CSR) reviews the order and then extends it to QAD EA after it has been validated. The extend process creates a customer record in QAD EA if necessary and loads the sales order. No credit card processing occurs.

7 The item is shipped. For orders paid by credit card, both a customer invoice record and a payment record are created at invoice post.

See “Managing the Order Process” on page 133.

Important If you plan to implement credit card processing, you must set *autoExtendNewCustomer* to True. This is because the credit card information that the shopper enters is passed directly to QAD EA and not stored in QAD CSS. When a CSR extends an order later after review, credit card information is not available.

The following sections contain more detailed information on setting up and managing this general activity flow.

Managing Users in B2C

The key difference between B2B and B2C is the relationship between the customer and the Web order-entry system. In a B2B scenario, the buyer typically logs in with a known identity and customer association. The B2B scenario involves long-term relationships between you and your customers and distributors.

In B2C, customers are not required to identify themselves until they are ready to check out and submit an order. To facilitate this, B2C customers can directly access a home page without preliminary login. This is implemented through the use of a special B2C start page, `op/op_indexB2C.html`.

See “Order Entry 2” on page 70.

This page is based on the OE2 page and is configured using the same registry settings.

When security checks are performed before displaying a page and the system detects that no session ID or login information is available, the page can be displayed if the system registry field *implemented* is true. This field indicates that B2C is being used.

When B2C is being used, the system identifies the user based on a default profile that you assign to a system registry setting. Security is applied to this B2C user based on a B2C security group—also defined with a registry setting—that determines which functions are available. If a function is not assigned to the B2C security group, the menu button or link does not display on the screen. This lets you ensure that B2C buyers can only access the areas that you want them to.

When B2C users select items to buy and click Check Out, they are prompted to log in or register. New users must provide address and billing information. QAD CSS creates a user record based on this information. When the sales order is sent to QAD EA, a customer record for this new user is created as well as the sales order. This number is then associated with the user, which you can see in User Maintenance, View/Edit Associations.

Registry Settings Affecting Users

These aspects of managing B2C users are controlled through several registry settings:

defaultB2CHomePage. This setting defines the default B2C user's home page. If you combine B2B and B2C shopping scenarios on your Web site, you can use this field to redirect B2C users to another type of start page. By default this is set to `/op/op_indexB2C.html`.

B2CSecurityGroup. 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.

defaultCustomerProfile. You create this customer record in QAD EA during implementation and then associate it with a default B2C user account in QAD CSS. This customer is used for creating sales quotes during the order-entry process to establish pricing and taxes.

defaultSite. 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.

When a new B2C customer record is created during the order entry process, this value is used as the customer's site.

defaultShipVia. This setting determines the ship via code associated with new customer records (cm_shipvia) created in QAD EA as part of extending customers in a B2C scenario. Make sure that this value is defined in Generalized Codes Maintenance (36.2.13) to avoid validation errors in Customer Data Maintenance (2.1.1).

defaultTimeZone. This setting defines the default time zone code associated with temporary address records created in QAD CSS. The default is PST.

When a new B2C customer record is created during the order entry process, this value is used as the customer's time zone.

getFedTin. This setting is used when creating temporary addresses during the order quote process to indicate that the federal taxpayer identification number should be used. Set this to True when tax calculations in QAD EA are performed through the Sales and Use Tax Interface to Vertex's Quantum system.

getStateTin. This setting is used when creating temporary addresses during the order quote process to indicate that the state taxpayer identification number used. Set this to True when tax calculations in QAD EA are performed through the Sales and Use Tax Interface to Vertex's Quantum system.

notifyCustomer. 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.

Setting Up the Default B2C User

There are several steps to creating the B2C user:

- Create a customer record in QAD EA that represents this user. This customer record is used when creating quotes for calculating prices and taxes.
- Create the B2C user record in QAD CSS and associate this user with the customer record in QAD EA.
- Define security and other settings for this user.

Set Up the B2C Customer in QAD EA

In designing your order-entry system, you can display order pricing information to the B2C user before the user has entered identifying information and before the order is actually created. This is managed in the background by creating a quote in QAD EA based on the order parameters and displaying this result to the user. The quote is immediately deleted and does not remain in the system.

See “QuoteOrder” on page 134.

Creating order quotes is based on the registry setting *QuoteOrder*, unless the order is paid by credit card. In this case, a quote is always created. The quote is created using a temporary ship-to that belongs to the QAD EA customer ID associated with the B2C user in QAD CSS. The address information supplied by the B2C shopper is used for the temporary ship-to address.

You must create the QAD EA customer to associate with the B2C account. You then associate it with the QAD CSS default B2C account in User Maintenance and specify this customer for the *defaultCustomerProfile* registry setting. When a new B2C customer is created during the order entry process, the customer data in QAD EA is used to create that customer.

In QAD EA, customers are created and all financial related data, such as credit limits and accounts, are defined by designated users with access to financial functions using Customer Create (27.20.1.1). After a customer has been created and set up by an authorized role, additional operational data such as the default inventory site for sales transactions can be associated with the record in Customer Data Maintenance (2.1.1).

Important To make customer data complete, fill in required fields in Customer Data Maintenance for the customer you created. This is required for the customer record to be loaded into and used by QAD CSS.

Before setting up customers in QAD EA, you must first define credit terms and customer type codes. Customers also require GL profiles for defining:

- Control accounts for invoices
- Control accounts for credit notes
- Customer bank accounts
- Sales accounts

See *QAD User Guide: Financials* for detailed information on how to set up customers in QAD EA.

Use the guidelines in Table 6.1 in addition to the information provided in *QAD User Guide: Financials* when creating the customer in Customer Create.

Table 6.1
Customer Create Field Values

Field	Description
Customer Code	You should create a new ID in that will not be used for any other purpose. This ID must match an ID in QAD CSS since this customer number is associated with the B2C user in QAD CSS.
Business Relation	Business relation information is required even though the information for real customers will vary. These values are required for the tax calculation during the quote process. You are required to specify values that represent typical values associated with your B2C customers.
Credit Terms	These are typically related to credit card payment.
Bank Account Number	This information is not used, but since this is a required field, enter a non-blank value such as N/A or Not Specified in the field.
Own Bank Number	Specify the number of your bank to be associated with this customer. See “Setting Up Credit Card Payment Formats” on page 128.
Payment Format	Specify the code set up for credit card processing in Payment Format Maintain associated with your bank account number. See “Setting Up Credit Card Payment Formats” on page 128.
Fixed Credit Limit	Set this to a value high enough to support the kinds of items your customers buy.
Taxable Customer	Set this to Yes to ensure that tax calculations are performed.

Use the guidelines in Table 6.2 in addition to the information provided in *QAD User Guide: Financials* when completing the customer data in Customer Data Maintenance (2.1.1).

Table 6.2
Customer Data Maintenance Field Values

Field	Description
Salespsn	Specify a salesperson if someone gets credit for B2C orders.
Ship Via	You can use the Ship Via value. Typically, it is better to use freight charge codes to support real shipping cost calculation. You determine how this is implemented using the *shippingOptions* registry setting, which can be set to validate based on the generalized codes defined for the so_shipvia field or a list of freight codes that you specify. **Important**: If you use ship via codes, make sure that you set up the same values for both cm_shipvia and so_shipvia to prevent validation errors in Customer Data Maintenance. Also set the *defaultShipVia* correctly.
PO Required	Ensure this is set to No. When this is set to Yes for the customer record in QAD EA, entry of a PO number is required during order-entry in QAD CSS.
Freight List	Typically this is left blank.

In Auto Number Customer - Modify in QAD EA, select the Active field to enable autonumbering for the B2C customer.

After setting up the customer record in QAD EA, test it by creating a quote for this new customer in Sales Quote Maintenance (7.12.1). You need to ensure you can proceed through the entire sales quote frame sequence accepting default values without filling anything in, using only the Next and Back buttons. This is required for the quote from QAD CSS to load successfully.

Set Up the B2C User in QAD CSS

To set up the B2C user in QAD CSS, follow these steps:

1. Use Security Group Maintenance to create a security group specifically for B2C customers.
2. Specify this group for the *B2CSecurityGroup* registry setting.
3. Create a generic user in User Maintenance to use as a B2C account.
   a. Make sure that this user record has the same ID as the QAD EA customer specified for *defaultCustomerProfile*.
   b. Specify the default domain to be used for unregistered users. This domain determines the items that display in the catalog for B2C shoppers.
   c. Associate the B2C security group with this user.
   d. Associate the QAD EA customer that represents the B2C user with this user.
   e. Specify a unique marketing group with this customer/user association, such as B2C_Mktg_Group. This lets you tailor promotions for your B2C customers.
4. Set up security in Menu Button Maintenance and Menu Maintenance using the B2C security group.
   a. You can customize which buttons display on the menu bar.

See “My Account Page” on page 120.

   b. You may want to use a different page for the My Account button such as `lg/my_account.html`. This is the page illustrated in the order examples in this chapter, which provides access to updating personal and address information, as well as viewing orders.
5. Update settings in System Module Maintenance for the home page that B2C customers display.
   a. You can determine which pages you want to let customers bookmark; you do not want them to bookmark pages that they cannot return to later.
   b. Set the Login Required field to Customer and Session Required to No for `op/op_indexB2C.html`.
6. Specify `op/op_indexB2C.html` as the value for the *defaultB2CHomePage* registry setting.

Set Up for Pricing and Tax Calculations

In a B2B scenario, you have a predefined set of customers. With well- established customers, you can set up special pricing discounts that are found by the best pricing algorithms in QAD EA. You can also ensure that all the required regional tax records are defined using Global Tax Management (GTM) functions.

A B2C scenario introduces more unknowns. As a result, you must ensure the QAD EA system is set up for a wider variety of pricing and taxation issues.

Pricing Issues

If you do not have special pricing requirements, QAD CSS will find the list price from Item Master Maintenance (1.4.1) if no other best prices are found. If you want to offer volume discounts, set up pricing analysis codes to account for the new customer records being created by QAD CSS.

Tax Issues

In a B2C scenario, customers enter their own address data. All of the GTM tax calculations in QAD EA are based on different aspects of addresses: city, county, state, country. Make sure that you have the proper GTM records set up to cover every possible combination of address values that your customers may enter, or you may encounter unexpected results in the tax calculation.

Also, account for the validation that the QAD EA system performs on address records.

- State and county codes are validated against codes set up Generalized Codes Maintenance (36.2.13).
- Country codes are validated against records set up in Country Create.

See “Managing the Order Process” on page 133.

Issues related to address verification can be managed by having a CSR review the order before it is submitted. This is implemented through the *autoExtendNewCustomer* registry setting.

My Account Page

In a B2B environment, the number of customer records you need to manage may be limited; in B2C environments, the number of customers is potentially much larger. As a result, you will probably want to let customers manage their own account information by providing access from the My Account menu button.

To do this, you can use Menu Button Maintenance to change the page associated with the My Account button to `lg/my_account.html` for the B2C security group.

Once you have completed this setup, the page illustrated in Figure 6.1 displays. This view displays after clicking the Personal Info button. Users can change their e-mail address, password, and secret question and answer.

Fig. 6.1
My Account: Personal Info

Clicking Order Status displays the screen in Figure 6.2. This shows the last 30-day history of orders this user has placed. This information is derived from querying the QAD EA database. Order Status reflects the action status on the sales order, set based on credit issues.

Fig. 6.2
My Account: Order Status

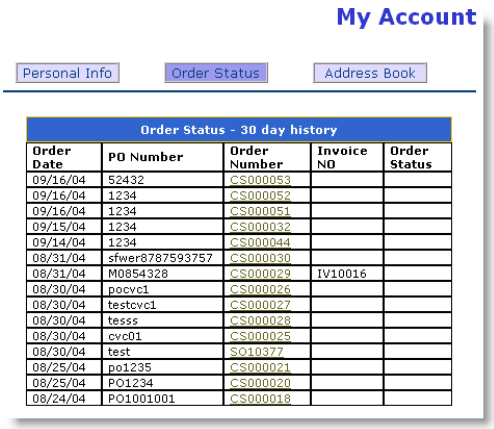
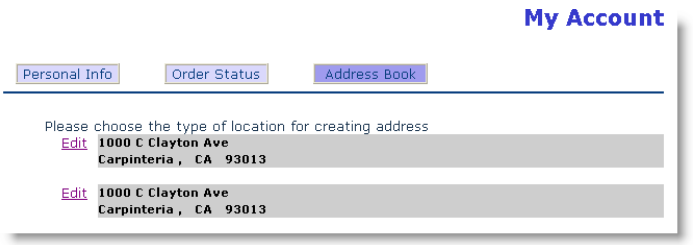


Figure 6.3 illustrates the Address Book page. Here users can change their ship-to and bill-to addresses.

Fig. 6.3
My Account: Address Book



Implementing Credit Card Processing

Credit card processing involves a real-time authorization and a capture (settlement) of the funds that were authorized.

- For an authorization, QAD CSS communicates with your credit card processor, who routes the transaction through the financial networks to the cardholder's issuing bank. The issuing bank checks whether the card is valid, evaluates whether sufficient credit exists, checks values such as Address Verification Service (AVS), and returns a response such as Approval or Decline. If the authorization is approved, the bank temporarily reserves credit for the amount of the transaction to prepare to capture (fulfill) the transaction.
- Capturing a transaction (also known as settling a transaction) actually transfers the funds to your bank. These charge transactions may be batched and sent once a day to the processor. The processor then charges the issuing bank and transfers the funds to your bank. It typically takes a few days before the money is actually available in your account, depending on your bank.

The processing service then returns a response to QAD EA indicating whether the payment was processed successfully.

Both credit card processing steps can be performed as a single transaction when merchants or manufacturers are able to take an order and ship the ordered item the same day. In QAD CSS, this transaction type is known as SALE. The authorization and capture take place when an order is successfully loaded into QAD EA.

However, for orders that are not shipped the same day, capture does not take place until the orders are shipped; that is, capture is delayed. In such cases, credit card processing takes place as two separate transactions—authorization followed by delayed capture. In QAD CSS, this transaction type is known as AUTH. Authorization takes place during the creation of the sales order in QAD EA and capture takes place later in Invoice Post and Print (7.13.4).

For details, see page 126.

The system registry setting *creditCardTransType* determines whether credit card processing is performed as a single transaction (SALE) or as two separate transactions (AUTH). For most companies, use the AUTH type, since using the SALE requires same-day shipments.

This section discusses how to set up the data required to process credit cards as well as how to the manage the process and review credit information in QAD EA.

Note the following important restrictions about credit-card processing:

- In a B2C scenario, you must have *autoExtendNewCustomer* set to True in the system registry.

  True: A customer record is created in QAD EA when the order is submitted.

  False: Temporary records are created in QAD CSS when the order is submitted. These can be reviewed by an administrator who then submits them to QAD EA. During initial implementation of QAD CSS, you set this field to False to monitor orders and customers before they are created in QAD EA.
- In a B2B scenario, you must have Post to QAD Core set to Yes in Order Control Maintenance.

A credit card transaction is initiated only after the associated sales order is committed to QAD EA.

The credit card implementation uses programs on the Credit Card Menu (7.21) in QAD EA. However, not all of these programs are used at this time:

- External Address X-Ref Browse (7.21.1) has no data for QAD CSS orders.

See page 131.

- Credit Card Transaction Browse (7.21.2) can be used to view credit card transaction information.
- Credit Card Sales Order Browse (7.21.3) has no data for QAD CSS orders.

See page 129.

- Credit Card Control (7.21.24) is required by the API that updates QAD EA with sales order credit card data.

Setting Up Credit Card Data

To implement credit card processing, you must complete the following general steps:

1. Obtain an integration kit from an established credit card processing service. The processing service provides the documentation required to set up the services you need to process transactions.
2. To accept credit cards over the Internet, you need a special account called an Internet Merchant Account and you must provide details about this account to your credit card processing service.
3. Execute the steps for setting up credit card processing described in *Installation Guide: QAD Customer Self Service*. This includes compiling required QAD EA programs, loading data, and configuring the VeriSign initialization file (`verisign.ini`).

Important If the `verisign.ini` file is not in the QAD EA PROPATH when a credit card invoice is posted, unexpected errors will occur.

4. Define information required to complete the credit card processing transactions using the QAD CSS Credit Card Vendor Maintenance function.

See “Setting Up Credit Card Registry Settings” on page 126.

5. Define the following registry settings:
   - *creditCardVendorCode* indicates the code that identifies you as a vendor for transaction processing.
   - *httpsURL* defines the URL of the host when running in secure mode.
   - *paymentOptions* indicates that payment option is, by default, credit card.
   - *creditCardTransType* indicates whether credit card transactions are processed in one step (authorization and capture) or two steps (authorization and delayed capture).
6. Set up secure processing for the Online Payment page.
7. Set up the Credit Card payment format in QAD EA.
8. Define settings in Credit Card Control in QAD EA.

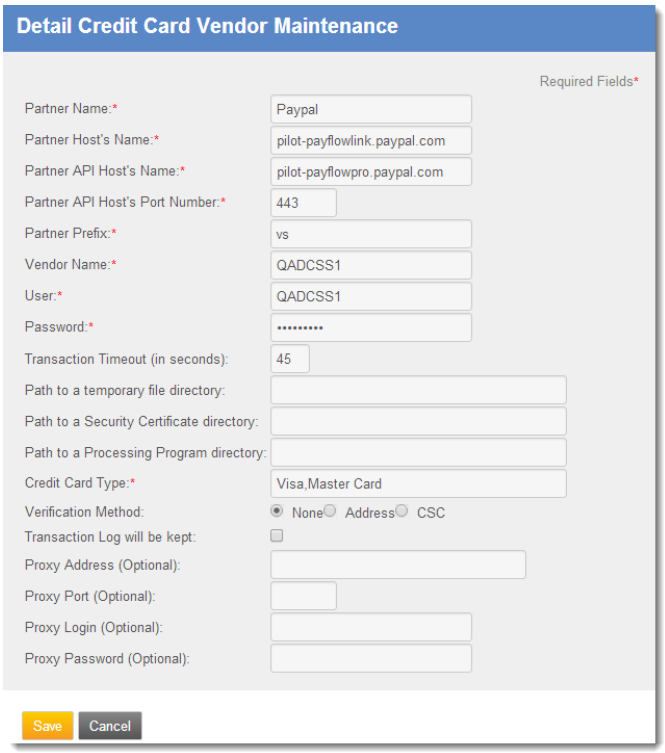
The first three steps in this process are outside the scope of this guide. The remaining steps are documented here.

Defining a Credit Card Vendor

You use Credit Card Vendor Maintenance in QAD CSS to define attributes of the credit card integration so that QAD CSS can invoke the processing tools defined by the service you select to handle your credit card transactions.

Important The values that you specify in this function must match the corresponding values in the `verisign.ini` file, defined during installation. The `verisign.ini` file is referenced by QAD EA and the values specified in Credit Card Vendor Maintenance are referenced by QAD CSS. Make sure that they stay the same in order to prevent processing errors.

Fig. 6.4
Credit Card Vendor Maintenance



Partner Name. Specify the name of the company that you are using for processing credit card transactions. Currently set this field to `Paypal`.

Partner Host's Name. Specify the host server name supplied by your credit card processing company. API uses this value when transactions are sent to be authorized.

- Currently, for test transactions, set this field to `pilot-payflowlink.paypal.com`.
- Currently, for live transactions, set this field to `payflowlink.paypal.com`.

Partner API Host's Name. Specify the API host name supplied by your credit card processing company.

- Currently, for test transactions, set this field to `pilot-payflowpro.paypal.com`.
- Currently, for live transactions, set this field to `payflowpro.paypal.com`.

Partner API Host's Port Number. Specify the port number supplied by your credit card processing company. API uses this value when transactions are sent to be authorized. Currently set this field to 443.

Partner Prefix. Specify a prefix that represents your credit card processing service; for example, specify the vs prefix for VeriSign. This prefix is used to locate the appropriate QAD CSS error message to display for VeriSign error codes. This feature lets you customize the content of the error message displayed to users based on your business requirements, rather than displaying the VeriSign return code description directly.

See "Setting Up Error Messages" on page 148.

Use QAD CSS Error Message Maintenance to modify message text if needed.

Example The error code 12 is returned by VeriSign. The system constructs a message ID based on the credit card module ID (cc), Partner Prefix (vs), and return code (0012). It then looks for a message with the ID ccvs0012 in the QAD CSS message table and displays that message content to the user.

Separate messages are set up in QAD CSS for most of the possible error codes that the credit card vendor system can return, detailing the specific error reasons. You may want to modify these messages if such detailed information is not needed.

See "Setting Up E-Mail Events" on page 143.

Since messages may not exist in QAD CSS for all possible return codes, a default message ID of ccvs000x is supplied with the system. If the system receives a VeriSign return code that is not registered, it displays the message content associated with the default error code. The system also sends an e-mail containing detailed error information to the CSR, based on e-mail event EX070.

Important Do not delete the ccsv000x message, since it is the system default.

Vendor Name. Specify the name that identifies you to your credit card processing service. This is the name by which you do business on the internet. You specify this name when you complete the application to use the processing partner's services.

User. Specify the user name that identifies you to your credit card processing company.

Password. Specify the secure password associated with the user previously entered. This is the password required for transmitting credit card transactions.

Note Currently, you are required to have a Payflow Payment Gateway account. The vendor name here corresponds to your login name of Payflow Payment Gateway. And the user corresponds to the user under the login account. Multiple users can share one login account. To sign up for a Payflow Payment Gateway account, go to:

https://www.paypal.com/webapps/mpp/payflow-payment-gateway

Transaction Timeout. Specify the number of seconds that is allowed for a credit card authorization to complete. This is typically set to 30 seconds. If the transaction does not complete within this time, an error is displayed.

Path to a temporary file directory. Specify the fully qualified path to the directory that is used to create temporary scripts when sending credit card transactions. Make sure that this directory is on the same server as the security certificate and processing program directories. Also ensure that the correct permissions are set on this directory to allow the system to create files.

Path to a Security Certificate directory. To enable the client to authenticate the payment processing server, specify the fully qualified path to the directory containing the security certificate that was created when you installed the integration components.

Path to a Processing Program directory. Specify the fully qualified path to the directory containing the executable programs required for sending credit card transactions.

Note The system assumes the final component of the path is a directory named `/bin` and appends `/bin` to the path you enter in this field.

Credit Card Type. Enter a comma-delimited list of credit card types that users can specify when placing an order. Valid choices are: VISA, MASTERCARD, AMERICAN EXPRESS, and DISCOVER. Spaces between values are ignored if entered.

Verification Method. Specify whether or not to use a verification method and if so, which method to use.

- None

  Do not use any verification method.

- Address

  Communicate Address Verification Service (AVS) codes with your credit card processing partner.

  AVS is a credit card fraud prevention tool designed specifically for ordering environments in which the customer is not physically present to show identification. It allows mail order and electronic commerce merchants to verify addresses by comparing a portion of the billing address from the order with the cardholder's address data. Note that not all merchant banks use AVS codes.

  When this option is selected, an additional screen displays during credit card payment that lets the user view and update billing address information to be sent with the credit card transaction.

- CSC

  Communicate Credit Security Codes (CSC) with your credit card processing partner.

  Credit Security Code is a three or four-digit number that appears on the credit card and provides a cryptographic check of the information embossed on the card.

  When this option is selected, an additional field displays during credit card payment that lets the user enter Credit Security Code to be sent with the credit card transaction.

Transaction Log will be kept. Indicate whether a log of transaction activity is kept in the wpro_cc_log table in QAD CSS. When this field is Yes, you can view the transactions maintained in the system using Credit Card Transaction Report on the Administration menu.

The four Proxy fields are currently not implemented.

Setting Up Credit Card Registry Settings

Set the following registry settings to support credit card processing:

creditCardTransType. This setting determines which credit card authorization process the system uses when customers submit sales orders. The values for this setting are:

SALE: Authorization and capture of funds takes place in one transaction. Make sure that you ship the item the same day the order is placed, and print and post the invoice.

AUTH: Authorization and capture take place in separate transactions. First, authorization by the provider of the credit card processing service takes place when the shopper submits an order. Capture takes place later during invoicing after the order is shipped.

In the case of partial shipments, reauthorization takes place when the remaining items are shipped.

See “Expiration Days” on page 129.

Note Specify the expiration date for a credit card authorization by setting a value in the Expiration Days field in Credit Card Control (7.21.24).

creditCardVendorCode. This setting determines which record created in Credit Card Vendor Maintenance the system uses 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.

httpsURL. This setting determines the URL of the host when running in secure mode.

Note 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 needed.
- Port numbers are included in the host URL, such as:

  http://host.MySite.com:1234

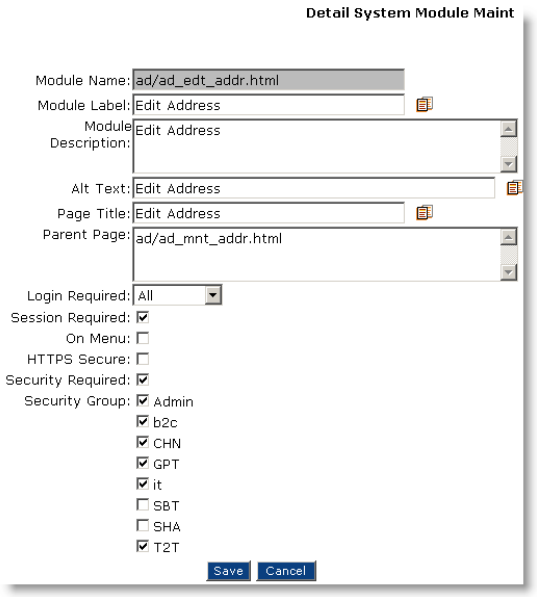
Setting Up Secure Processing

You can use System Module Maintenance to specify the secure processing used for specific pages. You do this by selecting the HTTPS Secure setting for the pages that you want to secure.

Note To implement this setting, SSL must be set up on your Web server. Otherwise, an error displays during processing.

Figure 6.5 illustrates the correct settings for the online payment page (`cc/cc_processcard.html`) in System Module Maintenance.

Fig. 6.5
HTTPS Secure



Setting Up Credit Card Payment Formats

Define credit card payment formats in QAD EA before credit card payment can be processed.

In QAD EA, payment formats are used in customer and supplier payments to define the layout of the payment output that let you create different payment instrument files—in this case, credit card—to be communicated electronically with banking systems.

When an order is placed from a QAD CSS Web site, QAD CSS communicates with the credit card issuing company to approve or decline the payment, and generates a sales order in the Sales module of QAD EA for approved payments. The sales order is processed using standard shipment functions and Invoice Post and Print. During invoice post, the system creates the corresponding customer invoice, captures the payment amount through the credit card authorization, and creates a new customer payment with a For Collection status. Receiving the banking information from the bank sets the payment status to Paid.

Use the following general steps to set up credit card payment format and related bank accounts. See *QAD User Guide: Financials* for details on these steps.

1 Create a credit card payment format in Payment Format Maintenance (25.11.2).

  The payment formats you set up for credit card processing must use the following attribute values:

  Module. Specify Accounts Receivable.

  Active. Set this to Yes.

  Payment Instrument. Choose Credit Card.

2 Link the credit card payment format to your own bank account in Bank Payment Format Link (25.11.2).

3 Associate this account and format with your default B2C customer on the Banking tab in Customer Create (27.20.1.1). See “Setting Up the Default B2C User” on page 117.

4 Define Customer Payment accounts to be associated with payment statuses. The account is then updated by the corresponding posting.

5 Define a Customer Payments daybook to contain the postings generated by the status transitions.

6 Create a set of payment statuses to match the stages through which you want to process the payment.

   Create the For Collection and Paid statuses for credit card processing performed as two separate transactions (AUTH) or in less likely situations, create one Paid status for credit card processing performed as a single transaction (SALE).

Generating Credit Card Control

The API that updates QAD EA with sales order credit card data requires the existence of Credit Card Control (7.21.24). Currently, only two of the values in the control program are used.

For details about credit card validation, see page 130.

Hold Action Status. Enter the status code that you want to populate the Action Status field in Sales Order Credit Maintenance (7.1.13) if credit card validation fails.

Expiration Days. Enter the number of days before the credit card authorization expires. This value is used to calculate the credit card authorization expiration date during an authorization transaction.

Enter any other required values and click next through the control program frames to create the required record.

Managing Credit Card Orders in QAD EA

After orders placed in QAD CSS are created in QAD EA, you use standard sales order processing procedures to allocate, pick, ship, and invoice them.

However, some special considerations apply to credit card orders:

- The printed invoice includes the following note:

```
**NOTE: The customer has promised to pay using a credit card
The card used at order time will be processed for payment
Customer is responsible for payment if credit card is denied
```

See *User Guide: Financials* for more information on the Accounts Receivable module.

- After Invoice Post and Print, the charge transaction is sent to the Credit Card vendor to capture the amount. A transaction ID and a response indicating whether the capture is successful is returned to QAD EA from the vendor.
- If the capture is successful, a Credit Card format customer payment is created associated with the invoice with the For Collection status.
- In the event of a failed capture transaction during invoice post, an invoice is created but no payment record is generated. The CSR then needs to contact the customer for another credit card and use the VeriSign tools to obtain a manual authorization.

See Figure 6.6 on page 132.

- When manual changes are needed, the CSR must modify the credit card information for the existing sales order in Sales Order Credit Maintenance (7.1.13), then ship the order and post the invoice in the normal manner.
- After bank entry is created for the transaction amount, the status of the associated customer payment is changed from For Collection to Paid.

Shipping Partial Orders

A credit card reauthorization in QAD EA is tied to a partial shipment from QAD EA. When an invoice is posted for a partial shipment—for example, only one line of a multiple-line order—the system automatically sends a message to the credit card processing service provider to get a reauthorization that can be used to ship the remaining part of the order.

Validating Additional Order Line on Existing Sales Order

When a new sales order line is added to an existing sales order with credit card payments, the CSR must manually authorize the new total amount that includes the additional line sales amount with the credit card service provider.

See Figure 6.6 on page 132.

When the credit card has been validated, modify the credit card information for the existing sales order in Sales Order Credit Maintenance (7.1.13). Then ship the order and print and post the invoice in the normal manner.

If the revalidation is not performed, a warning message is displayed when shipment is attempted.

Validating Credit Card Data

The credit card information is validated throughout the life cycle of the sales order to ensure successful capture during invoice post. This is because an order might not be filled and shipped immediately and credit card authorizations are valid only for a fixed period.

Whenever the sales order is accessed during maintenance or shipment, the system validates three pieces of credit card information:

- The total value of the sales order does not exceed the most recent value authorized for the credit card.
- The credit card associated with the order has not expired.

See “Expiration Days” on page 129.

- The time period during which the credit card purchase is authorized has not expired. This validation is based on the setting of Expiration Days in Credit Card Control (7.21.24).

The six programs that perform the validations are:

- Picklist/Pre-Shipper–Automatic (7.9.1)
- Pre-Shipper/Shipper Workbench (7.9.2)
- Pre-Shipper/Shipper Confirm (7.9.5)
- Sales Order Shipments (7.9.15)

- Pending Invoice Maintenance (7.13.1)
- Invoice Post and Print (7.13.4)

If one of these validations fails, the system displays a warning and places the order on credit hold, using the hold status specified in Credit Card Control.

Credit Hold

New customers that are created in QAD EA have their credit limit set to zero. If you do not want all orders from QAD CSS to be put on hold, disable the Hold Orders Over Credit Limit setting in Sales Order Accounting Control (36.9.6).

See *User Guide: QAD Sales* for more information.

Standard sales order processing in QAD EA applies to orders on hold. You cannot print a picklist for a credit-held order—one that has any non-blank value in the Action Status field. However, you can still ship the order if your company's shipping procedures allow you to do so without printing a picklist.

Use the following registry setting to manage the credit hold process in QAD CSS:

creditCardHoldStat. 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 QAD EA, the default hold status from Credit Card Control (7.21.24) is used. In QAD EA, any non-blank value in the Action Status field indicates that the order is on credit hold.

Viewing Credit Card Information

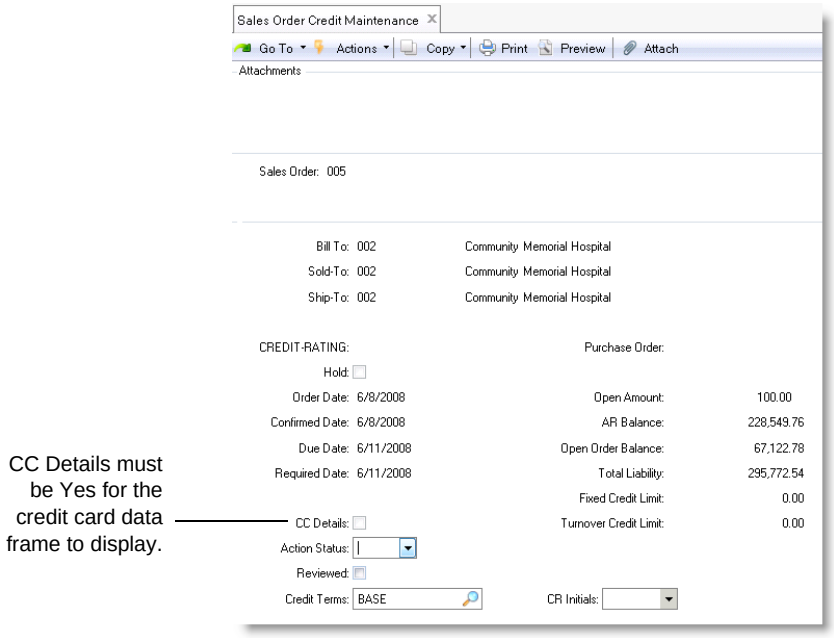
You can review the credit card information associated with a sales order using:

- Credit Card Transaction Browse (7.21.2)
- Sales Order Credit Maintenance (7.1.13)

Important Although you can change data in Sales Order Credit Maintenance, it is recommend you do so only under special circumstances, since the credit card transaction amount has already been authorized. You might need to use this, for example, if the shopper requests an additional item on the order and you have manually obtained the authorization for the additional amount.

To access the credit card data frames, set CC Details to Yes in the first frame. This field defaults to No for all orders; you can change it only when credit card information is associated with an order.

Fig. 6.6
Sales Order Credit Maintenance (7.1.13)



The credit card data frame includes such basic credit card information as the card number, billing address, and authorization data.

Address data defaults from the billing address on the sales order. The other fields on this frame contain credit card data sent to QAD EA from QAD CSS.

Credit Card Number. This field displays the credit card number entered and validated during order entry in QAD CSS. The first 12 digits of the credit card number are hidden behind asterisk characters. Only the last four digits are displayed in plain text.

Card Type. This field displays the type of credit card identified in Credit Card Number; for example, MasterCard or Visa.

The value is for reference only and is not necessary for credit card authorization and capture activities. The credit card number itself identifies the type.

Authorization Type. Specify whether or not to use a verification method and if so, which method to use.

- None

  Do not use any verification method.

- Address

  Communicate Address Verification Service (AVS) codes with your credit card processing partner.

  AVS is a credit card fraud prevention tool designed specifically for ordering environments in which the customer is not physically present to show identification. It allows mail order and electronic commerce merchants to verify addresses by comparing a portion of the billing address from the order with the cardholder's address data. Note that not all merchant banks use AVS codes.

When this option is selected, an additional screen displays during credit card payment that lets the user view and update billing address information to be sent with the credit card transaction.

Authorization Date. This is the date that the sales order amount was authorized for credit payment.

Authorization Expires. This is the date that the order payment authorization expires. The system populates this field with the date calculated by Authorization Date plus Expiration Days that was set in Credit Card Control.

The system validates sales order processing activities—such as shipping—against this field. If the authorization has expired before one of these activities, a warning displays and the sales order is placed on credit hold.

Authorization Amount. This field displays the amount that has been authorized for the credit card on this order.

Managing the Order Process

In planning a B2C system, you must make a number of implementation decisions related to what happens when a customer submits an order.

Extending Orders to QAD EA

You can choose to have the order submitted immediately to QAD EA or you can let the system create temporary records in QAD CSS. These can then be reviewed by one of your CSRs to determine if information is accurate. After review, the CSR manually releases the order.

Orders for new customers are either submitted or queued for review based on the *autoExtendNewCustomer* registry setting. How you set this field determines the basic flow of order processing in the system.

- When this is true, a customer record is created in QAD EA when the order is submitted.
- When this is false, temporary records are created in QAD CSS at order submission. These can be reviewed by a CSR who then submits them to QAD EA, creating the customer and the order.

Important If you plan to implement credit card processing, you must set *autoExtendNewCustomer* to True. This is because the credit card API is invoked only after the sales order is created in QAD EA. It is not invoked when a CSR extends an order later after review.

You can set this field to False during initial implementation to test the order process. You leave it set to false if you want order submission to be controlled by an internal user.

autoExtendNewCustomer is used with the setting of Post to QAD Core in Order Control Maintenance. Post to QAD Core supports the review of orders before submission.

See “Setting Up E-Mail Events” on page 143.

When *autoExtendNewCustomer* is False, the final order total with taxes and freight is not calculated and shown at the end of the order entry process. You should implement some means of notifying customers of the final total of the order after it is created. You can use e-mail events to implement this.

Other B2C Order-Processing Settings

Other processing decisions for B2C are also implemented through registry settings.

QuoteOrder. This setting is normally enabled for B2C processing, especially if credit card processing is used. When enabled, the system creates a quote in the background used to simulate the order and calculate the totals in preparation for asking for a credit card.

Note When the payment type is credit card, the order is always quoted, regardless of this value.

paymentOptions. This setting determines the payment options that display during checkout. In a B2C implementation, this should be set to option 1, credit cards. Purchase orders are not used in a B2C scenario. You can configure this for B2C by changing the registry setting for the B2C security group.

showOrderDetailInCheckOut. This setting determines if order trailer information displays in the order confirmation page. It is normally enabled in a B2C environment.

showOrderDetailTotals. This setting determines if totals associated with trailer details display. It is normally enabled in a B2C environment.

searchList. This setting determines whether the user's associated customer ID is used in the search for items.

- Master (or blank): Search for items not associated with a customer. This is the default value.
- Customer: Search for items associated with the currently logged-in customer or items associated with any customer IDs specified in the Master Customer field for the current customer. If no customer IDs are specified for the Master Customer field, only items associated with the current customer are found.

Order Processing Examples

This section includes a sample flow for:

- Orders submitted immediately to QAD EA with credit card processing (*autoExtendNewCustomer* is True)
- Orders created and then reviewed in QAD CSS (*autoExtendNewCustomer* is False)

Submit Orders Immediately

The order processing cycle illustrated in this section occurs when *autoExtendNewCustomer* is True. With this setting, an order is immediately submitted to QAD EA. The order can be placed on credit hold in QAD EA and reviewed before it continues on the sales order shipping and invoicing cycle.

Note This setting is required to use credit cards.

B2C Order Creation

See page 61.

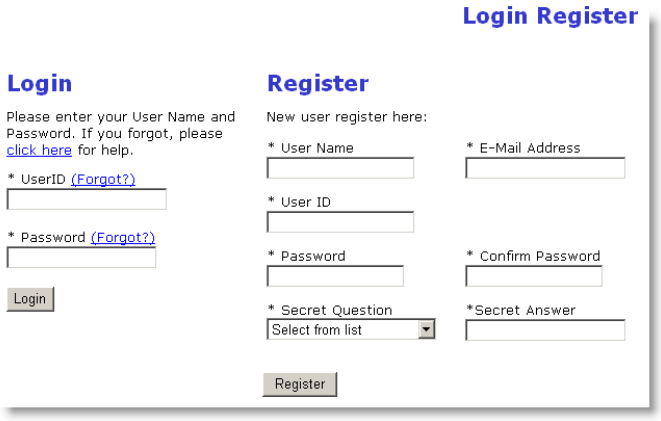
A B2C user selects items to order from the catalog in the same way as a B2B user. Information about options that affect the catalog pages is included in Chapter 5.

After choosing items, users click the Cart menu button to view the content in the cart.

User Login or Registration

Clicking Check Out from the cart displays a page requesting login or user registration as shown in Figure 6.7.

Fig. 6.7
Login Register Page



A user who has purchased items previously and has established an account can log in with an existing ID and password. Help is provided through e-mail for retrieving lost passwords.

A user who has never purchased items before must register to set up user information by filling out appropriate fields.

Clicking Register displays a page for additional address information as shown in Figure 6.8.

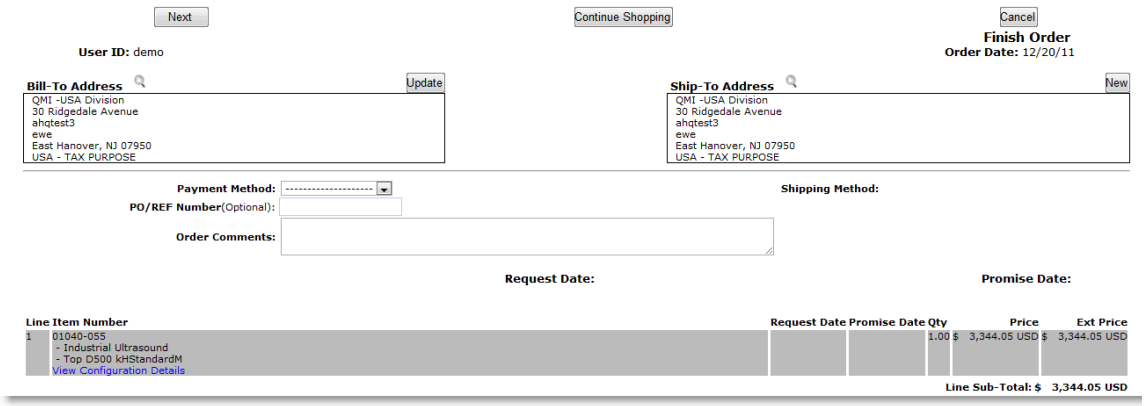
Fig. 6.8
Address Setup

The user enters shipping address information and clicks the check box if shipping and billing information is the same. Then the user clicks Next to continue.

Finishing the Order

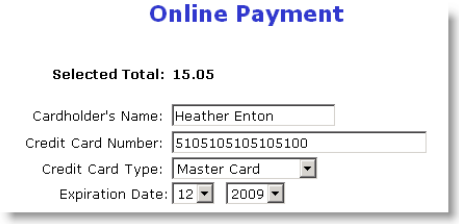
The Finish Order screen displays, shown in Figure 6.9. The user must supply a payment method—typically credit card—and shipping method.

Fig. 6.9
Finish Order



Clicking Submit Order displays a processing message. Then the shopper is prompted to enter credit card information.

Fig. 6.10
Online Payment



When the shopper enters credit card data and clicks Next, QAD CSS performs some local validations on the credit card:

- It confirms that the card number has the correct number of digits. Any character—for example, blanks or dashes—can be entered to group the digits as displayed on the card.
- It applies a simple algorithm to confirm that the card number is consistent with the card type.
- It confirms that the expiration date is in the future.

If you have selected address verification in Credit Card Vendor Maintenance, additional fields display so that the user can re-enter address information required for verification and return of the correct AVS code from the credit card processing company.

If you have selected CSC verification in Credit Card Vendor Maintenance, an additional field displays during credit card payment that lets you enter a Credit Security Code to be sent with the credit card transaction.

If a credit card does not receive an authentication code, the order is not submitted to QAD EA.

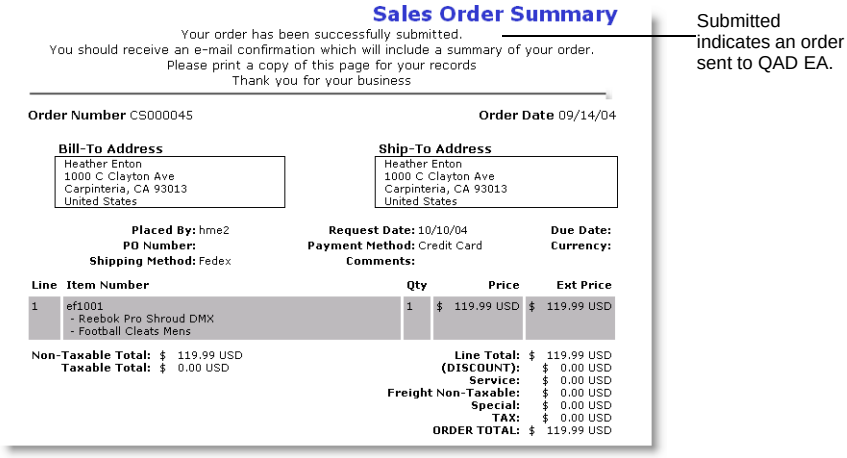
After prompting the shopper to correct any errors, QAD CSS submits the order to QAD EA and creates a credit card history record associated with the submitted order. After the order has been successfully created in QAD EA—and the customer record created for a new shopper—the credit card information is processed. QAD CSS assigns an order reference number and sends the information to the credit card service defined by the *creditCardVendorCode* registry setting. This requests an authorization from the financial institution that issued the credit card.

When the credit card processing is complete, a confirmation displays, shown in Figure 6.11. The language in this message is important since submitting the order is an event that depends on *autoExtendNewCustomer* being set to True.

See Figure 6.12 on page 139.

Note When this registry setting is False, the message says the order was received, indicating that it has been created in QAD CSS.

Fig. 6.11
Order Submitted to QAD EA



Submitted indicates an order sent to QAD EA.

See “Managing Credit Card Orders in QAD EA” on page 129.

This completes the order-entry process from the point of view of the B2C shopper. The order is now managed in QAD EA.

Review Orders Before Submitting

When *autoExtendNewCustomer* is False, you cannot use credit card processing. With this setting, an order is received in QAD CSS, but not created in QAD EA. An internal CSR reviews the order and submits it if there are no errors; this creates the sales order in QAD EA.

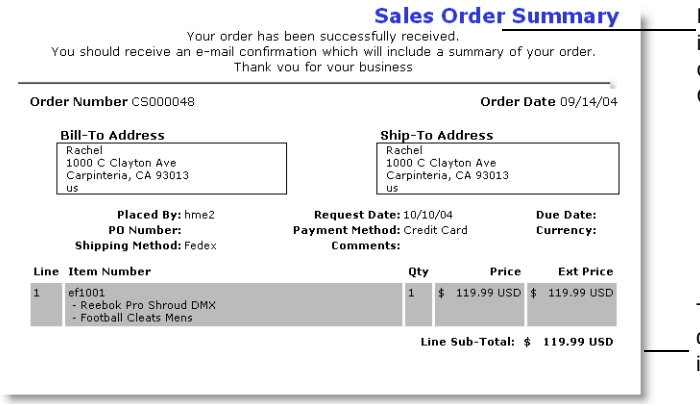
Note All of the initial order entry steps are the same as those described for submitting an order without reviewing.

After clicking Submit Order in the Finish Order screen (see Figure 6.9 on page 136), the screen shown in Figure 6.12 displays. The message in this case says the order was received, indicating that it has been created in QAD CSS. In addition, final tax and freight information do not display on the confirmation. These are calculated only after the order is created in QAD EA.

See “Setting Up E-Mail Events” on page 143.

When you choose this approach to order entry, you should also implement some means of notifying customers of the final total of the order after it is created. You can use e-mail events to implement this.

Fig. 6.12
Order Received by QAD CSS



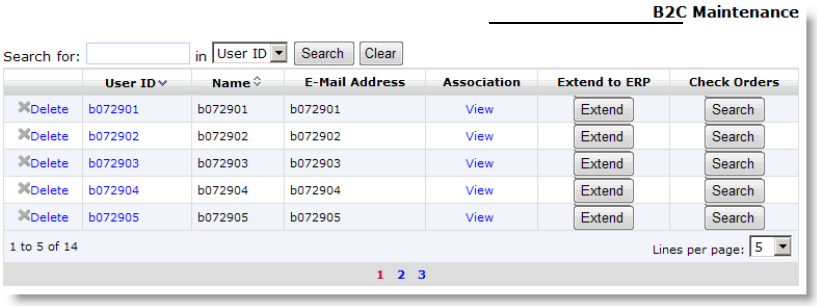
Received indicates an order in QAD CSS only.

Tax and freight details are not included.

Managing the Order in QAD CSS

When an order is received, it can be managed by an internal CSR using B2C Maintenance in QAD CSS. This screen shows all the users associated with the B2C security group.

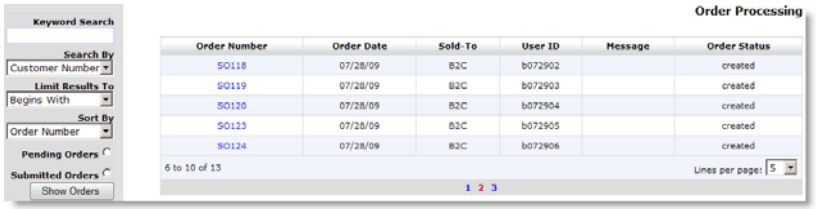
Fig. 6.13
B2C Maintenance



When the Extend button is shown, the order has not yet been submitted. Typically the CSR would click Search in the Check Orders column to review a user's order. This displays all orders for the selected user in a browse like the one in Figure 6.14.

See "Order Processing" on page 93.

Fig. 6.14
Pending Orders

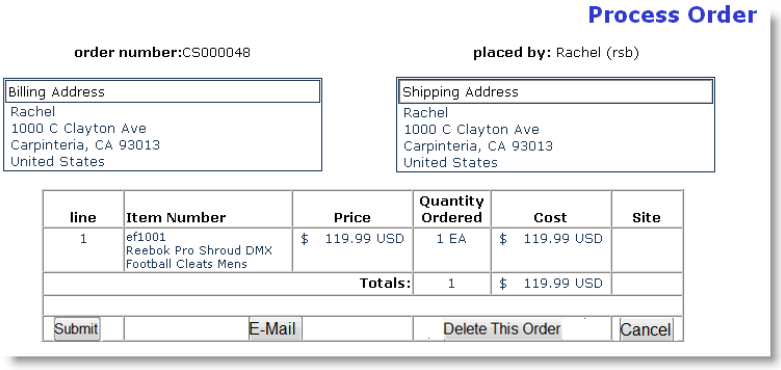


You can use the search fields on the left to select different orders to review. Pending orders have a status of created, like the one in Figure 6.14. These orders are local to the QAD CSS database. Submitted orders display a status of submitted; these orders have been posted to QAD EA and removed from the QAD CSS database.

Note If Archive Orders is Yes in Order Control Maintenance, orders are copied and stored in a separate table in QAD CSS.

Clicking an order displays details about it and provides various processing options.

Fig. 6.15
Processing a Pending Order



This screen offers four choices:

Submit. Click this button to send the order information to QAD EA. Successfully posting the order creates a QAD EA sales order and customer record and removes the order from QAD CSS. The status of the posted order becomes submitted.

E-Mail. Click this button to send a message to the e-mail address associated with the order customer. This option is typically used when the order review discloses a problem with the order. Perhaps the item is on back order, or the address is invalid. You can send a message directly to the individual informing them of the problem so it can be corrected.

Delete This Order. Click this option to remove the order without processing. This might be necessary if the customer cancels the order, for example, when items are not available immediately.

Cancel. Click this button to return to the previous screen.

This completes the order-entry process in QAD CSS. The order is now managed in QAD EA.

Chapter 7

Contacts and Messages

This chapter describes setting up contacts and managing the appearance and use of various types of messages displayed in QAD CSS.

Introduction 142
Discusses different features of QAD CSS which help manage and support relationships with customers.

Managing Contact Information 142
Explains how to manage contact information using Contact List.

Setting Up Messages 143
Explains how to set up e-mail systems, e-mail events, associate programs with e-mail events, set up error messages, set up FAQs, define welcome messages, and define messages for individuals.

Introduction

During implementation, you can set up two features of QAD CSS that help manage and support your relationship with your customers. These features include various types of messages and information about your company and individuals who provide customer support.

To manage contact information, you use these functions:

- Use Contact Maintenance to specify information about the individuals at your company who respond to customer requests.
- Use Contact Cross-Reference to associate contacts at your company with specific customers.

To manage message content, you use the following functions:

- Use E-Mail Master Maintenance to automatically notify users, customers, salespeople, administrators, and others when certain events occur.
- Use Error Message Maintenance to create, edit, and delete error and informational messages and define the delivery method (e-mail, HTML, or log).
- Use FAQ Category Maintenance and FAQ Maintenance to create question and answer pages that are grouped by topic.
- Use Message Maintenance to define welcome messages displayed on the home page and viewed by all users or groups of users.
- Use User Message Maintenance to create messages directed at specific users and displayed on the home page. The user must click a link to display the message content.

Managing Contact Information

Your customers can view contact information for your company by clicking the Contacts button on the QAD CSS menu bar. The information that displays on this page is defined in Contact Maintenance.

See “Company Contact Page” on page 89.

Note You can also use the default information set with the *defaultContactInfo* registry setting.

You can set up default contacts available to all users of the site, as well as lists for specific customers. Contacts are sorted and displayed by contact type, which lets you model your business organization. You can also associate images with contacts.

Contacts do not have to be individuals in the company; they can represent departments or different physical locations. The images can be maps or graphics of a corporate headquarters.

After defining contacts, associate them with specific customers or all customers in Contact Cross-Reference Maintenance.

Setting Up Messages

QAD CSS supplies several different types of messages, described in this section.

Setting Up Your E-Mail System

If you plan to implement automatic e-mail based on events or related to error messages, you must ensure that your e-mail system is properly defined in System Control Table Maintenance.

You use this control function to define the following elements of your e-mail system:

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. 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 administrator associated with the master contact e-mail address.

Setting Up E-Mail Events

You can set up QAD CSS to automatically send e-mail when certain events occur. The events are pre-defined trigger points. You use E-Mail Master Maintenance to activate the events and define the message content. 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.

Note These users do not have to access the system. Setting them up as users is required to define the e-mail address. You can send e-mails 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 e-mail to the user whose session generated the message or to the salesperson associated with an order.

Note To notify salespeople requires custom programming to store the appropriate e-mail addresses in QAD EA.

One system registry setting can be used to configure e-mail. The *companyTimeZone* setting is used to set the time sent for e-mail messages. The default is –0800 PST.

As installed, QAD CSS includes predefined events and messages available for use in your implementation. Contact QAD Global Services if you need additional events.

Table 7.1
E-Mail Events

Event ID	Event Name	E-Mail Subject
Order Events		
EX001	Customer Order Submitted	Thank-you for your order
	Code called in `op/op_processing.html`. Executes after the user clicks Checkout and before the Order Summary page displays when the order has been successfully saved in QAD CSS.	
EX007	Order – submitted	QAD CSS – Order submitted successfully
	Code called in `op/op_processing.html`. Executes after the user clicks Checkout and before the Order Summary page displays when the order has been successfully saved in QAD CSS.	
EX008	Order – Error	QAD CSS – Error on Order Entry
	Code called in `op/op_processing.html`. Executes after the user clicks Checkout and before the Order Summary page displays when the order cannot be saved in QAD CSS.	
EX009	Order – processed	QAD CSS – New Processed Order
	Code called in `op/op_processing.html`. Executes after the user clicks Checkout and before the Order Summary page displays when the order has been successfully saved in QAD CSS.	
EX010	Order Delete	QAD CSS – Deletion in Order Processing
	Executes when an administrative user clicks Delete Order from the Order Processing page, which is accessed either from the menu or from B2C Maintenance.	
EX012	Order – Error	QAD CSS – Error, Order Processing
	Not currently implemented.	
EX014	checkOrder FAILED	Submit Order error in checkOrder
	Executes in `op_orderdisplayprocess.html` when a user clicks Submit and an error occurs creating the order.	
EX015	SubmitOrder No record	Submit Order with no record available
	Code called in `op/op_processing.html`. Executes after the user clicks Checkout and before the Order Summary page displays when the order is not saved in QAD CSS because the order number is not available.	
EX016	SubmitOrder Double Post	Submit Order – double post
	Code called in `op/op_processing.html`. Executes after the user clicks Checkout and before the Order Summary page displays when the order is not saved in QAD CSS because the order status is incorrect. This typically indicates the order already exists.	

Table 7.1 — (Page 1 of 4)

Event ID	Event Name	E-Mail Subject
EX019	Order Package	Submit Order error in OrderPackage
	Not currently implemented.	
EX071	Sales Order Control Locked	Order Number generated by CSS – Sales Order Control record locked.
	QAD CSS WARNING: Order Number [@orderNum] has been assigned by CSS. The Sales Order Control record is locked.	
EX072	Tax – Warning	QAD CSS Tax environment not found
	Sales Order for [@orderNum] on [@eventDate] does not include actual tax values. This is due to unavailability of corresponding tax environment setup. Please contact the Customer Support Administrator. Temp Load input file: [@TransFile] Temp Load output file: [@TransFileOut] Warnings: [@LoadError]	
EX073	Customer Order Waiting for Review	QAD CSS Order Waiting for Review and Approval
	Sales order [@orderNum] from customer [@custID] [@custName] was received on [@eventDate] at [@eventTime] and is waiting for your review and approval.	
Admin Events		
EX003	User – Added	QAD CSS – User has been added
	Generated in `ad_mnt_usermstr.html` when an administrative user successfully adds and saves a new user record.	
EX004	User – Deleted	QAD CSS – User has been deleted
	Generated in `ad_mnt_usermstr.html` when an administrative user successfully deletes a user record.	
EX005	User – Modified	QAD CSS – User account modified
	Generated when a user record is successfully modified in User Maintenance, User Detail Maintenance, or Personal Info page accessed from the B2C My Account page.	
EX006	Personal Admin	QAD CSS – Personal Administration
	Generated when a user record is successfully modified in the Personal Administration page.	
EX018	Credit Hold	QAD CSS – Account status information
	Generated from each of the order-entry main pages: OE1, OE2, OE3, as well as the home page and order confirmation page.	
EX020	Credit limit Exceeded	QAD CSS – exceeded credit limit
	Executes in `lg_newloginstart.html` for B2C customer.	
EX021	Customer – Modified	[@custName] has been modified
	Not currently implemented.	
EX022	Customer – Deleted	[@custName] has been Deleted
	Not currently implemented.	

Table 7.1 — (Page 2 of 4)

Event ID	Event Name	E-Mail Subject
EX030	Password Changed	QAD CSS – Password Change
	Generated in the various pages users can access when they have forgotten a password and need to reset it.	
EX031	User Login	User ([@userName]) has just logged in.
	Generated when a user successfully logs in.	
EX040	Email Feedback	Email Feedback from QAD CSS
	Generated when a user sends e-mail from the Contacts page.	
EX061	BTC User – Added	QAD CSS – BTC user has been added
	Generated for new B2C users during registration from `lg_loginregister.html` and `lg_newloginstart.html`.	
EX062	Automatic Customer Extend Successful	Automatic Customer Extend Successful
	Generated for new B2C users during registration from `lg_newloginstart.html` when the creation of a customer record succeeds.	
EX063	Automatic Customer Extend Failed	Automatic Customer Extend Failed
	Generated for new B2C users during registration from `lg_newloginstart.html` when the creation of a customer record failed.	
EX064	User Registration	User Registration
	Not currently implemented.	
EX065	User Registration Notification	User has registered
	Generated when a user successfully completes online registration from `lg_registeronlinesubmit.html`.	
EX066	User Account Disabled	Your QAD CSS account has been deactivated
	Generated during login when the number of login attempts exceeds three and the system registry settings *failedLogin* and *disableAccount* are both Yes.	
ATP Events		
EX069	ATP Check Warning/Error	ATP Check warning/Error happened
	Warning/error generated by ATP enforcement while creating order [@orderNum]	
Credit Card Processing Events		
EX070	Credit card authentication service error	Credit card authentication service error happened
	Credit card authentication service error [@ccErr] for customer [@custID], user [@userID] at [@eventDate], [@eventTime]. Please contact system administrator	

Table 7.1 — (Page 3 of 4)

Event ID	Event Name	E-Mail Subject
Quote Events		
EXB2BQuote	B2B Quote Request	Quote – Request
	Generated when an order is submitted and *quoteOrder* is Yes from `op_b2bquoteavail.html`.	
EXB2CQuote	B2C Quote Request	Quote – Request
	Not currently implemented.	
System Events		
EX017	Session Number Error	A find on SessionNumber Failed
	Generated when an order is submitted and a valid session number cannot be found.	
EX023	Control Table Update	QAD CSS – System Control Table Update
	Generated whenever a change is saved in System Control Table Maintenance (`ad/ad_mnt_controltable.html`).	

Table 7.1 — (Page 4 of 4)

When you specify the subject line for the message and the message content, you can use any of the variables listed in Table 7.2. Values for these variables are supplied at run time and included in the message.

Note To use variable substitution, you must select a variable that will have a value when the event triggering the message occurs. For example, generating an e-mail with the `[@orderNum]` symbol at the time of login will not produce an order number in the e-mail content.

Table 7.2
Variables in E-Mail

Variable	Value
@ccErr	Return code from credit card processing service
@Curr1	First currency in exchange rate
@Curr2	Second currency in exchange rate
@custID	Logged-in customer ID
@eventDate	Date event occurred
@eventTime	Time event occurred
@invoiceNum	Invoice number
@orderNum	Current order number
@PONum	Purchase order number
@SOCurr	Currency of current sales order
@TRMDivCur	Currency associated with the division of the current customer
@userEmail	E-mail address associated with the logged-in user
@userID	Logged-in user ID
@userName	Name associated with the logged-in user

Associating Programs with E-Mail Events

You can also associate the custom programs with the e-mail message:

- The header program specifies the name of a procedure that generates the header of the e-mail.
- The body report program specifies the name of a procedure that generates the body of the message.
- The footer program specifies the name of a procedure that generates the footer of the e-mail.
- The attachment report program specifies the name of a procedure that generates attachments to the e-mail.

Using these features requires custom programming or the help of QAD Global Services. Use the following guidelines for attachments.

Attachment Report Program

In order to use e-mail attachments, the program specified in Event Master Maintenance as the attachment program needs to be created with the following parameters:

```
Input 1: vsessionNumber AS CHARACTER
Input 2: eventID AS CHARACTER
Input 3: <character input specific to the event such as Order Number> AS CHARACTER
Input 4: <character input specific to the event such as order status> AS CHARACTER
Output1: AttachmentFileName
Output2: AttachmentFileMimeType
```

The input parameters can be used as need; the output parameters contain the name of the file you want to attach to the e-mail and its MIME type.

The MIME (multipurpose internet mail extension) type tells the system how the file can be opened. MIME types represent a protocol for exchanging information on the Internet. The MIME header is inserted at the beginning of a Web transmission so that client programs can select the appropriate associated application.

There are different types of MIME, such as application, audio, image, message, text, and video. For example, the MIME type for Adobe Acrobat PDF files is:

```
application/pdf
```

To attach an Acrobat PDF to an e-mail in QAD CSS, you would specify this for Output2:

```
Output2: application/pdf
```

Setting Up Error Messages

You can use Error Message Maintenance to modify the message text of JavaScript or Progress messages. This functions similar to E-Mail Master Maintenance; however, you are not limited to e-mail as the message output.

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.

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.

JavaScript error messages are preloaded into HTML pages. When adding or modifying a JavaScript message, you must regenerate the message file. The following registry setting determines the location of these message files:

jsmsgDir. This setting determines the directory location where the JavaScript messages are stored. To support multiple languages, after error messages are set up within QAD CSS, they are read from a generated JavaScript file at runtime. By default, this location is:

`CSSInstallDir/qadcss/scripts`

Note To add new event actions, you may need the help of QAD Global Services.

Setting Up FAQ

Creating frequently asked questions can reduce your administrative support costs by helping users find their own answers to common questions. 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.

See “Assigning Menu Bar Buttons” on page 39.

If you choose to implement FAQ, you should consider adding a new button to the menu bar for accessing the FAQ.

There are two steps to setting up FAQ:

- Define categories for grouping related FAQ.
- Specify the FAQ content.

Defining FAQ Categories

Use FAQ Category Maintenance to set up categories for grouping similar FAQ. FAQ categories define distinct classes for FAQs that deal with closely related topics. Categories must be created before defining FAQs in FAQ Maintenance.

When you specify a FAQ category, you can also specify a form name. Leave this field blank to use the standard form supplied with QAD CSS. If you have created custom forms, specify them here.

Setting up FAQ Content

Use FAQ Maintenance to create multiple question-and-answer Web pages.

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.

Note Users see FAQs only in their associated languages.

When you specify a FAQ, you can also specify a form name. You should leave this field blank to use the standard form supplied with QAD CSS. If you have created custom forms, specify them here.

Defining Welcome Messages

Use Message Maintenance to associate welcome messages with specific users or users in one or more marketing groups for defined date ranges. The display of welcome messages is managed by two registry settings:

See page 68.

- *indexOrder* controls the display of welcome messages on the login page.

See page 70.

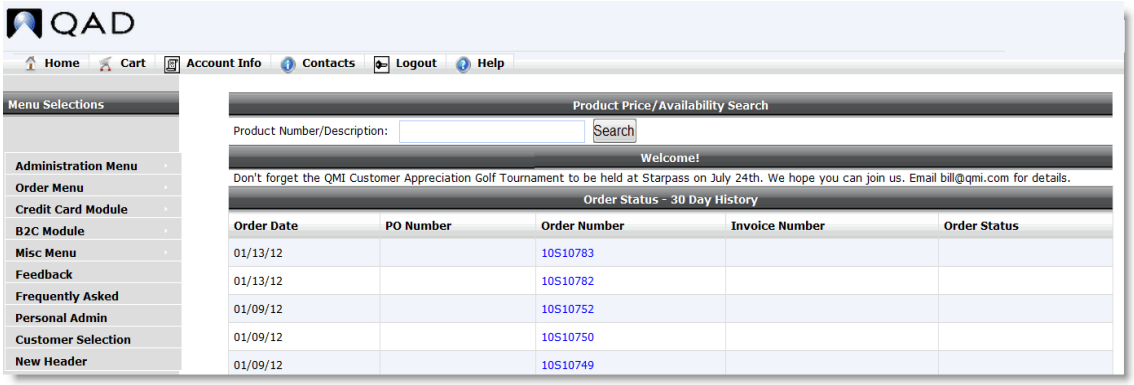
- *indexOrderHome* determines what displays in the content area of the order screen for both OE1 and OE2.

Note These settings control both whether the message displays and where on the page it displays.

Multiple welcome messages can display at the same time. QAD CSS inserts the message content inside an HTML table cell. You can provide messages in plain text or with HTML markup tags. If you use HTML tags, remember to apply proper syntax and test the message before releasing to a production environment.

You can specify start and end dates for messages. This lets you define messages ahead of time which then are rolled out on a specified date.

Fig. 7.1
Welcome Message Added to Home Page



Defining Messages for Individuals

You can use User Message Maintenance to associate messages with a specific user. User messages can show off a new feature, welcome a new user to the site, advertise specials, or supply any other information specific to a user.

Messages meant to be seen by all users, or specified groups of users, are maintained in Message Maintenance.

When a user message exists, a message notification is included in the page header. Based on registry settings, a User Messages heading and message area can also display on the home page and order entry 1 and order entry 2 main pages.

See page 68.

- *indexOrder* controls the display of welcome messages on the login page.

See page 70.

- *indexOrderHome* determines what displays in the content area of the order screen for both OE1 and OE2.

Note These settings control both whether the message displays and where on the page it displays.

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 inserts the user message content inside an HTML table cell.

One system registry setting affects user messages. The setting *userMessageArchive* determines if user messages are archived or deleted from the main index page.

No: Messages are physically removed when the index page redisplays.

Yes: Messages are marked for deletion but not physically removed.

Chapter 8

Integration with QAD EA

This chapter describes the various integration points between QAD CSS and QAD EA.

Introduction 154
Outlines the relationship between QAD CSS and QAD EA.

Users in QAD EA 154
Lists the prerequisites and describes the procedure for setting up QAD EA users.

Sales Orders 155
Describes which settings are used to control different aspects of processing, and addresses sales order field mapping.

Introduction

QAD CSS and QAD EA run as separate applications that pass data back and forth at key integration points.

Items and customers are loaded once during initial implementation. New items can be extracted and loaded later as needed.

Other QAD EA data that is referenced by QAD CSS includes:

- Address data such as ship-to and bill-to is stored in QAD EA and passed to QAD CSS when needed. Based on registry settings, address information can be updated in QAD CSS and passed back to
QAD EA.
- Ship Via codes that are defined in Generalized Codes Maintenance for so_shipvia can be referenced in QAD CSS as shipping options when *shippingOptions* is set to EA.
- Sales order number from Sales Order Control when *useERPOrderNumber* is Yes.
- A predefined user that the system uses when logging into QAD EA.
- Pricing information generating through an API to the pricing logic in QAD EA.
- Availability of items generated through an API to inventory data in EA.

Users in QAD EA

QAD CSS requires the existence of a user record in QAD EA. Set up this user in QAD EA and make sure that the appropriate security is set up for it. See *QAD User Guide: Financials* for detailed information on how to set up a user in QAD EA. This user must have access to at least these functions in the system:

- Sales Order Maintenance (7.1.1)
- Sales Order Shipments (7.9.15)
- Invoice Post and Print (7.13.4)
- Customer Payment Create (27.6.4.1)
- Banking Entry Create (31.1.1)
- Journal Entry Create (25.13.1.1)
- Customer Create (27.20.1.1)
- Customer Ship-to Create (27.20.2.1)
- Customer Ship-to Delete (27.20.2.4)
- Business Relation Create (36.1.4.3.1)
- Business Relation Modify (36.1.4.3.2)
- Business Relation Delete (36.1.4.3.4)
- Customer Bank Number Import (27.20.1.9)
- Supplier Bank Number Import (28.20.1.7)

This user must have access to all possible domains that your QAD CSS instance will interact with; otherwise, the order load will fail.

After defining this user in QAD EA, use the following QAD CSS registry settings to record the login information:

QADUser. Specify the ID of the user that QAD CSS should use to log in to QAD EA. The default is mfg.

QADUPasswd. Specify the password that QAD CSS should use to log in to QAD EA.

Important If you are using password expiration dates as part of your security setup in QAD EA, make sure that the system administrator changes the password for this user before the password expires and then updates the *QADUPasswd* setting appropriately. Otherwise, QAD CSS does not start up or integrate correctly with QAD EA.

QADUDomain. Specify the domain that QAD CSS should use to log in to QAD EA. This would typically be set to the QADUser's default domain. However, CSS needs to know this value prior to login and obtains it from this registry setting.

Sales Orders

Chapter 5 discussed how you can use registry fields and administrative functions to manage the order-entry process. This section discusses settings that affect the order when it is submitted to QAD EA.

In normal order processing, when an order is submitted by the buyer, the system validates the order and creates a file that is used to update QAD EA. When the order is successfully saved in QAD EA, 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.

Note Make sure that Sales Order Maintenance is not blocked in Blocked Transaction Maintenance.

You can use the following registry settings to control aspects of this process:

useUserID. Use this field to determine the value that populates the Entered By field for sales orders in QAD EA:

LoginName: The ID of the user who is currently logged in to QAD CSS updates the Entered By field, letting you trace the order to a specific user.

Blank: The value of *QADUser* updates the Entered By field. This is the user associated with the process that updates the sales order table.

deleteOrder. This setting determines whether submitted orders are deleted by the system. This is normally set to Yes; you might need to set it to No to troubleshoot a problem a user is having.

Note You can use the Archive setting in Order Control Maintenance to instruct the system to save a copy of an order in a QAD CSS archive table before deleting it.

orderHeadCommit. 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 QAD EA, so if you specify a type, make sure it will pass validation.

orderLineCommit. This setting determines the type value of comments associated with the order lines.

Sales Order Field Mapping

QAD CSS creates QDocs that are loaded into QAD EA through EDI to create sales orders based on data stored in QAD CSS.

During the order creation process, field values from QAD CSS table fields are mapped to fields in so_mstr and sod_det.

Note If you have made any customizations to Sales Order Maintenance that introduce new frames or pop-up sequences, you may need to modify a couple of programs as well the QDoc schema.

Table 8.1 lists only fields that receive a value from QAD CSS. Other sales order fields that are not listed use any defaults supplied by standard QAD EA.

Table 8.1
Sales Order Field Mapping

CSS Field	QAD EA Field
Set based on setting of useERPOrderNumber	so_nbr
wpro_order_header.sold_to	so_cust
wpro_order_header.bill_to	so_bill
wpro_order_header.ship_to	so_ship
wpro_order_header.order_date	so_ord_date
wpro_order_header.request_date	so_req_date
wpro_order_header.due_date	so_due_date
wpro_order_header.po	so_po
wpro_order_header.remarks	so_rmks
Set based on value of *confirmedOrders* registry setting	confirm
wpro_order_header.currency	so_curr
lwpro_order_header.order_comments	socmmts
wpro_order_header.order_comments	cd_cmmt
wpro_order_line.line	line
wpro_order_line.item_number	sod_part
wpro_order_line.site	sod_site
wpro_order_line.quantity	sod_qty_ord
wpro_order_line.um	sod_um
wpro_order_line.price_list	sod_pr_list
wpro_order_line.lotSerial	sod_serial
Set based on value of *confirmedOrders* registry setting	sod_confirm
wpro_order_line.request_date	sod_req_date
wpro_order_line.um_conversion	sod_um_conv
wpro_order_line.line_comments	cd_cmmt

CSS Field	QAD EA Field
Credit status calculated based on wpro_order_header.order_total	so_stat
Set to yes if wpro_order_header.partial_ship is On or Yes	so_partial
wpro_order_header.shipping_method; if blank, use value of *defaultShipVia*	so_shipvia

Chapter 9

Implementation Test

This chapter includes a series of steps for validating that information is communicated correctly between QAD CSS and QAD EA.

Preliminary Steps 160
Describes prerequisite steps and conditions to start the testing process.

Testing the Implementation 160
Describes how to verify data in QAD EA, create a user, enter an order, verify addresses, verify order submission, create orders from order templates, test comments functions, verify product categories, and generate summary reports.

Using Admin Functions to Troubleshoot 165
Discusses the functions used to troubleshoot successfully.

Correcting Order Submission Failures 166
Explains how to determine the cause of order submission failures and complete them.

Preliminary Steps

Before you can start the testing process, obtain the following information from your system administrator of QAD EA:

- Five or more customer address codes defined in Customer Maintenance (2.1.1)
- Billing and shipping addresses for these customers
- Customer Aging Analysis Current (27.17.6) for each customer
- Whether PO Required is Yes or No in the customer address record
- Five or more items that are in both QAD EA and QAD CSS

  Note When choosing items, make sure that if you price by customer, the items you select illustrate the pricing. Also, if you are displaying item images in the catalog, include some items with images.
- Items with a quantity price break
- Categories for all the items that you are testing
- A list of five or more product categories created during Catalog Load and the number of items in each group

  Note Ensure that the items you are testing represent a random sample of the five product categories.
- Pricing What-If Inquiry (1.10.1.13) for each item

Testing the Implementation

To check that QAD CSS has been installed and configured properly, follow the steps described for the following tasks:

1. Verify Data in QAD EA
2. Create a User
3. Enter an Order
4. Verify Addresses
5. Verify Order Submission
6. Create Order from Order Template
7. Test Comments Functions
8. Verify Product Categories
9. Generate Summary Reports

Verify Data in QAD EA

Important You may have more than one QAD EA environment. Ensure that you are using data from the environment that QAD CSS is connected to.

1. Log in to a QAD EA session running the same database you connected QAD CSS to.
2. Run Customer Ship-To Address Report (2.1.15) for the test customer addresses.
3. Check this report against the report you were given. If any data does not match, stop and consult the system administrator of QAD EA.
4. Run Customer Aging Analysis Current (27.17.6) for the test customer addresses.
5. Check this report against the report you were given. If any data does not match, stop and consult the system administrator of QAD EA.
6. Run Pricing What-If Inquiry (1.10.1.13).
7. Check this report against the report you were given. If any data does not match, stop and consult the system administrator of QAD EA.

Once you have verified that all of your data matches, you can proceed. Do not continue if there is even a minor variation in the data. Without perfect data, you cannot accurately test the success of the installation.

Create a User

Follow these steps to associate QAD CSS users with customer addresses you were provided from QAD EA.

1. Log in from the QAD CSS home page using the following information:

   Login: `demo`

   Password: `demoex`
2. Select Administration Menu; then choose User Maintenance.
3. Create a new user with the following information:

   User name: `installTest`

   Password: `installTest`
4. Associate the customers you were given to the new user you just created.
5. Log out.
6. Log in as the new user you just created.

Enter an Order

When you implement QAD CSS, you configure one or more custom ordering methods: order entry 1 (OE1), order entry 2 (OE2), or order entry 3 (OE3). Before you begin this procedure, make sure you understand how the order entry process has been implemented.

1. From the order menu, choose the ordering method that was implemented.
2. Find an item by category.
3. Verify that the price listed is the correct price for this customer.
4. Add this item to your shopping cart.
5. Update the order quantity to the custom price break quantity for this customer.
6. Click Continue Ordering. The previous screen displays with the search criteria you entered.
7. Enter an item on your list in the search box.
8. Change the quantity of the item.
9. Add the item to the shopping cart.
10. Save this order as an order template. Call it InstallTestQA.
11. Return to the shopping cart.
12. Check out.
13. Verify that all the item data is still accurate.

Repeat these steps for all of the order-entry methods that you implemented.

Verify Addresses

Follow these steps to verify that QAD CSS has replicated the correct bill-to and ship-to addresses for the test customers:

1. On the checkout screen, validate that the bill-to address is correct.
2. Validate that the ship-to address is correct.
3. Browse the ship-to addresses and validate that all are correct.
4. Select a different ship-to address.
5. Verify that the Order Confirmation screen has been updated with the new address.
6. Verify the shipping methods available.

   Note Shipping methods vary depending on your implementation. They may represent Ship Via codes in QAD EA or freight codes.
7. Click Continue Shopping.
8. Click Check Out.
9. Verify that the same billing, shipping, and item information displays.

10 Click Submit Order.

11 Verify that the order trailer information is correct.

Note Record test order numbers below for later reference.

Order Number: _____

Order Number: _____

Order Number: _____

Order Number: _____

Order Number: _____

Verify Order Submission

At this point, all the data for this customer has been verified. Now verify that the order just created in QAD CSS was committed to QAD EA.

You now need a terminal that can access the QAD EA environment that QAD CSS is connected to.

1 In QAD EA, run Sales Order Maintenance (7.1.1).

2 Enter an order number created in QAD CSS.

3 Verify that the order information is correct.

Important To confirm that the order-entry process is working correctly, enter an order, check the ship-to and bill-to addresses, and verify that sales orders were generated in QAD EA for each customer on the test list.

Create Order from Order Template

In step 10 on page 162, you saved the order you were processing as an order template. In this task, verify that you can place another order using that template.

1 From the Order Menu, choose the ordering method that was implemented.

2 Click Order Templates.

3 Select the order template you saved (InstallTestQA).

4 Click Check Out.

5 Click Submit Order.

6 Verify that the order trailer information is correct.

7 Follow the steps under “Verify Order Submission” to confirm that the order created from a template was submitted correctly in QAD EA.

Test Comments Functions

Follow these steps to test the header and line comments functions. Before starting, verify that header and line comment features are enabled in QAD CSS System Registry Maintenance.

Header Comments

1. From the Order Menu, choose the ordering method that was implemented.
2. Click on Order Templates.
3. Select the order template you saved (InstallTestQA).
4. Click Check Out.
5. Enter an order comment.
6. Click Submit Order.
7. Verify that the comment displays on the trailer page.
8. Repeat this process, but do not enter an order comment in step 5.
9. Verify that no comments display on the trailer page.

Line Comments

To test line comments, use the same process as header comments, with one exception. Before clicking Check Out, click the Comment link for the line. Then enter a comment and click Check Out.

Multiple Comments

On a multiple-line order, you can optionally enter comments by line. To test this function:

1. Follow steps 1 through 3 above.
2. Click the Comment link on the order line.
3. Enter a comment.
4. Click Continue Ordering.
5. Add another item to your cart.
6. Click Continue Ordering.
7. Add another item to your cart.
8. Click the Comment link.
9. Enter a comment.
10. Click Submit Order.
11. Verify that comments display on the trailer page only for items on which you entered them.

Verify Product Categories

See “Preliminary Steps” on page 160.

Use this procedure to verify that the product categories in QAD EA are replicated to QAD CSS correctly. Refer to the list of product categories you were provided.

1. From the Order Menu, choose the ordering method that was implemented.
2. Select one of the product categories from your list.
3. In the bottom left corner of the result table, verify the total number returned with the total number on your list.
4. Select the next product group on your list.
5. Repeat these steps for the other groups on your list.

Generate Summary Reports

As a final test to make sure that QAD CSS and QAD EA are communicating correctly, follow these steps to create two QAD CSS reports, as well as one from QAD EA. Then compare the output.

1. Create Customer Credit Report.
   a. On the QAD CSS menu bar, click Account Info.
   b. Run the Customer Credit Report.
   c. Enter all the information requested.
2. Create Order Summary Report.
   a. On the QAD CSS menu bar, click Account Info.
   b. Run the Order Summary Report.
   c. Enter all the information requested.
3. From a QAD EA session, print out a report from Customer Aging Analysis Current (27.17.6) for the test customer bill-to addresses.
4. Compare the three reports to verify that all the data matches.

Using Admin Functions to Troubleshoot

A number of administrative functions can help you analyze and troubleshoot issues, especially during the testing phase when you are working out the proper settings and integration of your system.

See “Defining Order Processing Options” on page 96.

In QAD CSS Order Control Maintenance (Administration Menu|System Control Menu|Order Control):

- Set Recover Orders to Yes to save orders as they are being entered to eliminate network connection issues.
- Set Archive Orders to Yes to keep a copy of an order in QAD CSS after it is posted to QAD EA. You can use this to compare the order in the two databases in case of discrepancies.
- Set Archive Incomplete Orders to Yes to also archive incomplete orders not posted to QAD EA.

In System Control Maintenance:

- Enable Keep Transaction Log to log all Web site activity to a journal. Review this information with Transaction History Report.
- Enable Debug Flag to capture additional technical information useful during development and Web site analysis.

Important Do not operate in debug mode in a production environment.

See “Managing User Sessions” on page 39.

Use Session Maintenance to view activity for users.

Use the following registry setting to view orders in QAD CSS:

deleteOrders. 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. When the order is successfully saved in QAD EA, 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.

Correcting Order Submission Failures

For various reasons, an order may not be fully uploaded to QAD EA, thus causing the order history in QAD CSS to be inconsistent with that in QAD EA.

To determine the cause of the failed upload, the CSR can follow these steps:

1. Check that the fields in Order Control Maintenance are set as directed in “Using Admin Functions to Troubleshoot” on page 165.
2. Check that the Keep Transaction Log field is set in QAD CSS System Control Table Maintenance (Administration Menu|System Control Menu|System Control).
3. Check that *deleteOrders* is set in System Registry (Administration Menu|System Registry).

To complete a failed order submission, take these steps:

1. Access the Unprocessed Order Report (Order Menu|OP Menu|Unprocessed Order).
2. Analyze the information to determine the problem causing rejection.
3. Using QAD EA, analyze and correct the data or setup.
4. Perform one of the following steps:

- In QAD CSS, resubmit the order (Order Menu|Order Processing).
- Delete the unprocessed order in QAD CSS (Order Menu|Order Processing).

Note The deleted order remains visible in the six order reports (Order Menu|Account Information) relating to submitted orders.

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 170
Describes B2C registry fields, their keys, and their defaults.

Credit Card Registry Fields 172
Describes credit card registry fields, their keys, and their defaults.

Clearance Registry Fields 172
Describes clearance registry fields, their keys, and their defaults.

Customer Contact Registry Fields 172
Describes customer contact registry fields, their keys, and their defaults.

Order Processing Registry Fields 173
Describes order processing registry fields, their keys, and their defaults.

Directory Paths Registry Fields 187
Describes directory paths registry fields, their keys, and their defaults.

System Registry Fields 188
Describes system registry fields, their keys, and their defaults.

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 177).
- Use the pipe symbol (|) to separate a code from its value (see “paymentOptions” on page 177).

Table A.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 QAD EA. True: A customer record is created in QAD EA 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 QAD EA. Set this field to False during initial implementation to monitor orders and customers before they are created in QAD EA.
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.

Table A.1 Business-to-Customer (B2C) Registry Fields (Page 2 of 2)

Key	Default	Over	Usage
createB2CProcess		No	This setting determines when the customer account is created in QAD EA. Auto: A customer record is created in QAD EA 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 QAD EA. This setting is referenced in the `lg/lg_newloginstart.html` page, which is an alternate way for letting B2C users register.
defaultCustomerProfile	B2C	No	This customer is used for creating sales quotes during the order-entry process to establish pricing and taxes. You create this customer record in QAD EA during implementation and then associate it with a default B2C user account in QAD CSS.
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.
DefaultLangForB2CCust	English	No	This setting sets the customer default language code.
defaultShipVia		No	This setting determines the ship via code associated with new customer records (cm_shipvia) created in QAD EA as part of extending customers in a B2C scenario. Make sure that this value is defined in Generalized Codes Maintenance (36.2.13) to avoid validation errors in Customer Data 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 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 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 A.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 QAD EA, the default hold status is used. In QAD EA, 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 A.3 Clearance Registry Fields

Key	Default	Over	Usage
notificationDate		No	Stores the date that the site was cleared. Not currently implemented.

Table A.4 Customer Contact Registry Fields

Key	Default	Over	Usage
default Contact Info	<A HREF= "http://www.yoururl.com" > 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 A.5 Order Processing Registry Fields (Page 1 of 15)

Key	Default	Over	Usage
addAll	No	No	This setting determines whether to display the Add All Selected Items button on the Order Entry page so that the user can add multiple items to the shopping cart all at once.
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. Note that this setting does not apply for configurable items defined in QAD Configurator.
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.
AlertMemo	Yes	No	This setting determines whether to indicate in the order entry process whether an item is an expensed memo type item. When this is Yes, an icon displays next to a memo type item. When this is No, there is no indication of memo type items.
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 A.5 Order Processing Registry Fields (Page 2 of 15)

Key	Default	Over	Usage
custDldTimeExceed	1000		This setting determines the maximum time, in milliseconds, allowed for the customer records to be downloaded to a csv file.
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. When the order is successfully saved in QAD EA, 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 `op/op_item_lookup.html`. OE2: The system loads `op/op_index.html`.
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 A.5 Order Processing Registry Fields (Page 3 of 15)

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, bcItem_confirm, and bchdo_entry).
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.

Table A.5 Order Processing Registry Fields (Page 4 of 15)

Key	Default	Over	Usage
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 3in 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.
OEHome	op/op_itemlookup.html	No	This setting determines 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 login, 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.
orderEntryRightUI	Both	No	This setting determines whether item number, or item description, or both are displayed on the Express Order panel, which is on the right side of the order entry 2 page. Number: Only item number is displayed. Description: Only item description is displayed. Both: Both item number and description are displayed.

Table A.5 Order Processing Registry Fields (Page 5 of 15)

Key	Default	Over	Usage
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 QAD EA, 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.
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.

Table A.5 Order Processing Registry Fields (Page 6 of 15)

Key	Default	Over	Usage
QADUDomain		No	Specify the domain that QAD CSS should use to log in to QAD EA. This field is used with QADUser. A valid user record with access to this domain must be defined in User Maintenance (36.3.1).
QADUPasswd		No	Specify the password that QAD CSS should use to log in to QAD EA. This field is used with QADUser. A valid user record with this password must be defined in QAD EA. If you are using password expiration dates as part of your security setup in QAD EA, make sure that the system administrator changes the password for this user before the password expires and then updates the *QADUPasswd* setting appropriately. Otherwise, QAD CSS does not start up or integrate correctly with QAD EA.
QADUser	mfg	No	Specify the ID of the user that QAD CSS should use to log in to QAD EA. This user must be defined in QAD EA.
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 QAD EA 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.
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.

Table A.5 Order Processing Registry Fields (Page 7 of 15)

Key	Default	Over	Usage
runGetAllWhseQty	Yes	No	This setting determines if QAD CSS gets information about the on-hand inventory quantity from QAD EA 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.
runGetBestPrice	Yes	No	This setting determines if QAD CSS runs the best pricing logic 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 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.

Table A.5 Order Processing Registry Fields (Page 8 of 15)

Key	Default	Over	Usage
runGetDefWhseQty	Yes	No	This setting determines if QAD CSS gets information about the on-hand inventory quantity for the default site from QAD EA 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 QAD EA • 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.
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.

Table A.5 Order Processing Registry Fields (Page 9 of 15)

Key	Default	Over	Usage
searchList	Master	Yes	This setting determines whether the user's associated customer ID is used in the search for items: • Master (or blank): Search for items not associated with a customer. This is the default value. • Customer: Search for items associated with the currently logged-in customer or items associated with any customer IDs specified in the Master Customer field for the current customer. If no customer IDs are specified for the Master Customer field, only items associated with the current customer are found.
searchMethod	Contains	No	This setting determines if the search type for item search is whole-word search or substring search. • Contains: Item searches are whole-word searches, where the search term is treated as representing the whole word. • Matches: Item searches are substring searches, where the search term is treated as a substring.
searchSortName	Yes	No	Not currently implemented.
setDueDate	No	No	This setting determines the due date on the Shopping Cart page. The options are: • Yes: Use Header/Line requests in CSS to populate the Header/Line Due Date. • No: Always use the default Due Date calculated by EA.
setReqDate	No	No	This setting determines the default value of the request date on the Shopping Cart page. The options are: • Yes, and promise dates are being calculated in QAD EA: 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. 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 QAD EA.

Table A.5 Order Processing Registry Fields (Page 10 of 15)

Key	Default	Over	Usage
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.
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 A.5 Order Processing Registry Fields (Page 11 of 15)

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. *showReqDate* is typically Yes in this case. • Yes: Line item request dates are entered. The *showReqDate* field is typically set to No. However, when both *showReqDate* and *showLineReqDate* 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.
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 QAD EA. Implementers must map this value if they want it to be part of the QAD EA 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.

Table A.5 Order Processing Registry Fields (Page 12 of 15)

Key	Default	Over	Usage
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 with ShowOrderDetailInCheckOut to display the totals associated with the details.
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 `orderinstructions.html` 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 *showLinePromDate* to Yes.

Table A.5 Order Processing Registry Fields (Page 13 of 15)

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 *showLineReqDate* 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 *showLineReqDate* to Yes. When *showReqDate* and *showLineReqDate* 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 shippingOptions 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 sort_name, cust_part, item_type. The default is item_number. 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.
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.

Table A.5 Order Processing Registry Fields (Page 14 of 15)

Key	Default	Over	Usage
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. The generation of the order number occurs before the order is submitted to QAD EA.
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 QAD EA

Table A.5 Order Processing Registry Fields (Page 15 of 15)

Key	Default	Over	Usage
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.
useUserID	LoginName	No	Use this field to determine the value that populates the Entered By field for sales orders in QAD EA: • 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 178) updates the Entered By field. This is the user associated with the process that updates the sales order table.
vshowItemThumbImage	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 with vupdateItemThumbImage.
vupdateItemThumbImage	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 with vshowItemThumbImage.
scripts		Yes	Not currently implemented. Lets you override the location of the QAD CSS scripts specified in System Control Table Maintenance.

Table A.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 A.7 System Registry Fields (Page 1 of 7)

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.
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 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.
ConfiguratorWSURL	`http://`*`cfgWebSpeedServerHostName`*`/cgi-bin/wspd_cgi.ksh/WService=`*`cfgWebSpeedBrokerName`*	No	This setting provides the Configurator WebSpeed URL to enableQAD CSS for items defined with the QAD Configurator (an add-on product for QAD EA).
custDisplayLimit	25	Yes	This setting determines how users select a customer during login when more than one customer is associated with them in User Maintenance. • If the number of customer records associated with the user is less than the value you specify, a drop-down list appears. • If the number of customer records associated with the user is greater than the value you specify, a screen with lookups appears.
defaultCountry	USA	No	This setting defines the default country to use in address records. These must be valid country codes defined in QAD EA.
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.

Table A.7 System Registry Fields (Page 2 of 7)

Key	Default	Over	Usage
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 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 login attempts and disables the account if required.
exHeaderButtonIcon	Yes	No	This setting controls whether to display button icons in the header.
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.
exHeaderSearch	Top	No	When exHeaderType is 2, this field controls where the search object displays in the header. Valid entries are Top and Bottom.
exHeaderType	1	Yes	This setting determines the style of the QAD CSS header: • When exHeaderType is 1, there is no header. • When exHeaderType is 2, the header consists of search, date, user, cart summary, and check out. • When exHeaderType is 3, the header is customizable.
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.

Table A.7 System Registry Fields (Page 3 of 7)

Key	Default	Over	Usage
genMenuInLineF	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.
hostCopyrightText	A Passion For Manufacturing © Copyright 1997-2005 QAD Inc.	Yes	This setting defines the host copyright text located in the footer. Change this to a value appropriate for your installation.
hostURL	http://www.EnterYour 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.EnterYour 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.

Table A.7 System Registry Fields (Page 4 of 7)

Key	Default	Over	Usage
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 login 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.
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 A.7 System Registry Fields (Page 5 of 7)

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.
jsmsgDir	/qadcss/scripts	No	Specify the full path to the directory where generated error message files are located. *QADCSSInstallDir*/scripts 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.
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.

Table A.7 System Registry Fields (Page 6 of 7)

Key	Default	Over	Usage
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 host_logo.gif) 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 host_logo.gif 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
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 `host_logo.gif` is used; this image is always used on the header.
runSecurePages	Yes	No	Not currently implemented. Makes pages in the application that use the makeSecure function run under https (SSL). This is required for credit card implementation.
showAddLoginInfo	No	No	Tells the menu bar if additional login 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.
stylesheet	`qad_style.css`	No	This setting sets the style sheet file for all pages.

Table A.7 System Registry Fields (Page 7 of 7)

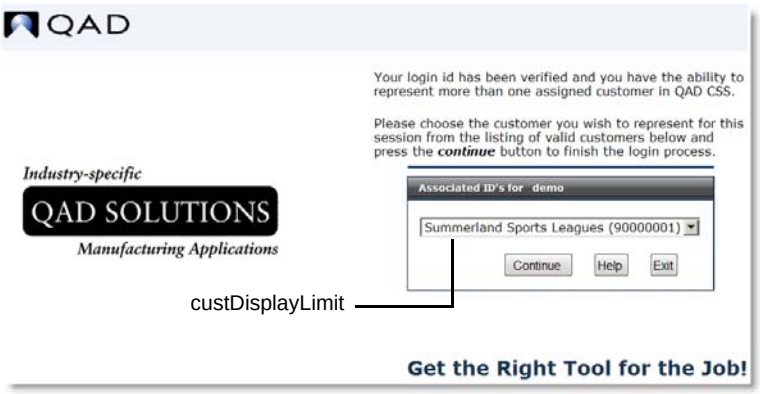
Key	Default	Over	Usage
ShowSTDEXTConfTabs	Yes	No	This setting determines whether the Standard Configurations and Existing Configurations tabs are displayed in the configuration questionnaire. No: Standard Configurations and Existing Configurations tabs are not displayed in the configuration questionnaire. Yes: Standard Configurations and Existing Configurations tabs are displayed in the configuration questionnaire.
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 redisplays. Yes: Messages are marked for deletion but not physically removed.

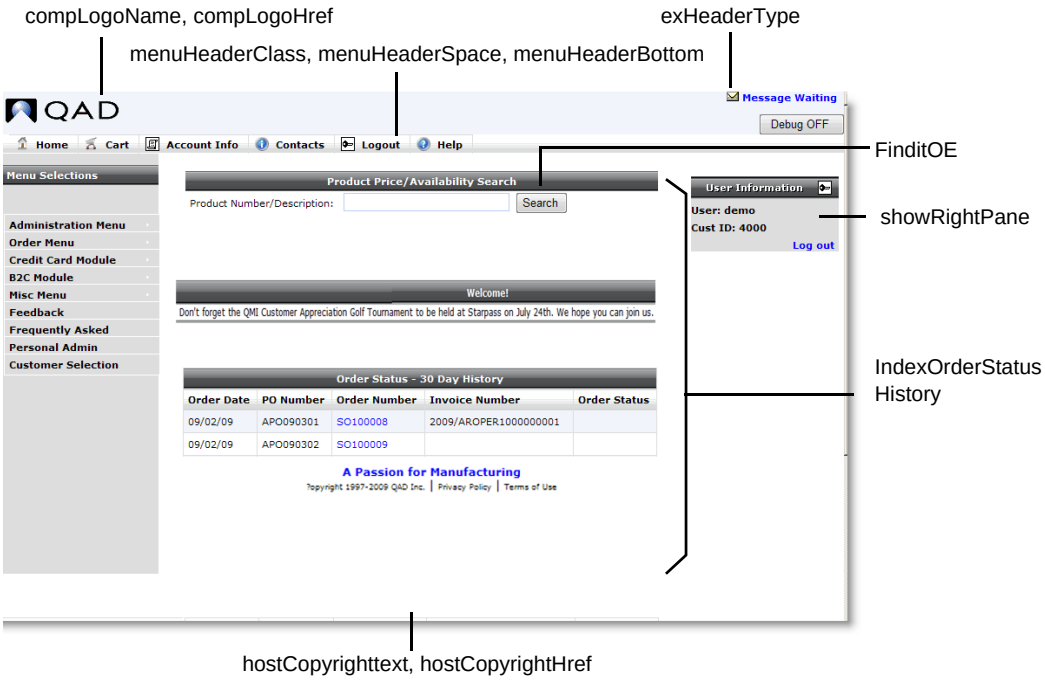
Appendix B

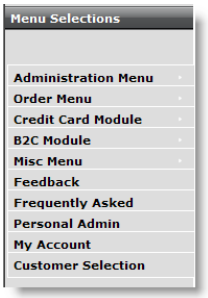
System Registry Fields Illustrated

This appendix visually explains the effects of some system registry settings on the CSS UI through illustrations. A line that connects a system registry field to a particular UI element on the screen shot indicates a direct correlation between them. For detailed descriptions of the system registry fields illustrated here, see “System Registry Fields” on page 169.

QAD Customer Self Service
Get the Right Tool for the Job!
Industry-specific
QAD SOLUTIONS
Manufacturing Applications
User:
Password:
OK
minPasswordLength

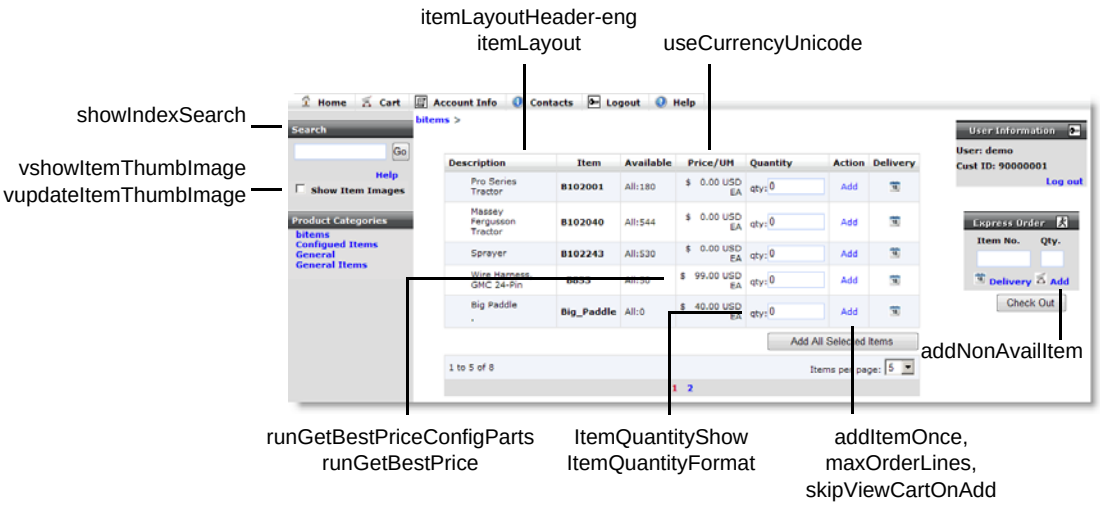

QAD
Your login id has been verified and you have the ability to represent more than one assigned customer in QAD CSS.
Please choose the customer you wish to represent for this session from the listing of valid customers below and press the continue button to finish the login process.
Industry-specific
QAD SOLUTIONS
Manufacturing Applications
Associated ID's for demo
Summerland Sports Leagues (90000001)
Continue
Help
Exit
custDisplayLimit
Get the Right Tool for the Job!

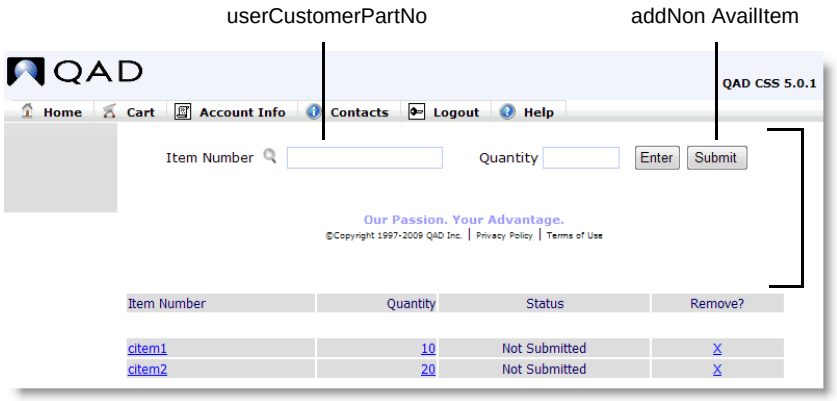

compLogoName, compLogoHref
menuHeaderClass, menuHeaderSpace, menuHeaderBottom
exHeaderType
FinditOE
showRightPane
IndexOrderStatus History
hostCopyrighttext, hostCopyrightHref
QAD
Message Waiting
Debug OFF
Home
Cart
Account Info
Contacts
Logout
Help
Menu Selections
Administration Menu
Order Menu
Credit Card Module
B2C Module
Misc Menu
Feedback
Frequently Asked
Personal Admin
Customer Selection
Product Price/Availability Search
Product Number/Description:
Search
User Information
User: demo
Cust ID: 4000
Log out
Welcome!
Don't forget the QMI Customer Appreciation Golf Tournament to be held at Starpass on July 24th. We hope you can join us.
Order Status - 30 Day History
Order Date
PO Number
Order Number
Invoice Number
Order Status
09/02/09
APO090301
SO100008
2009/AROPER1000000001
09/02/09
APO090302
SO100009
A Passion for Manufacturing
Copyright 1997-2009 QAD Inc. | Privacy Policy | Terms of Use

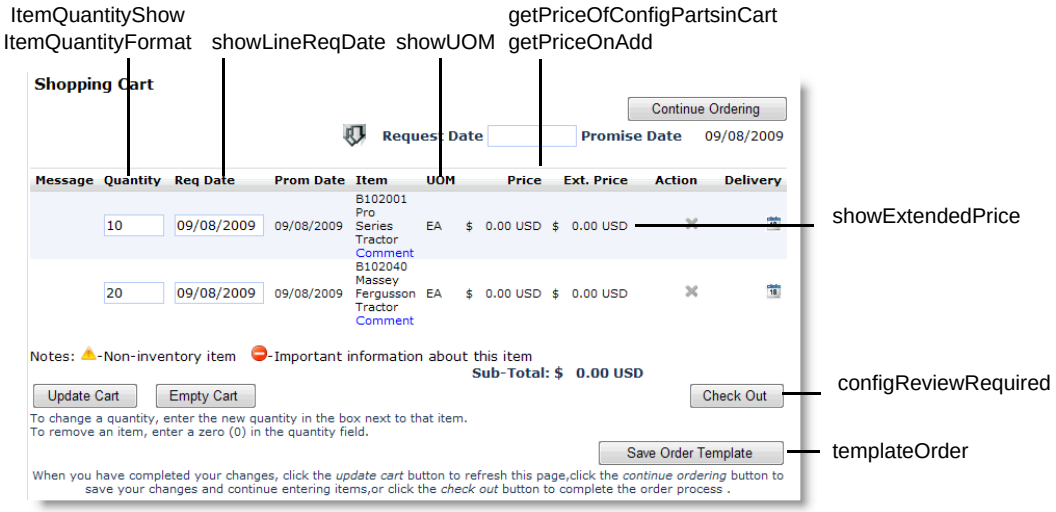


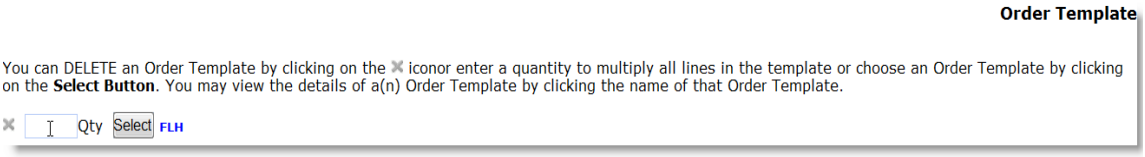
MenuBackGround
MenuBackGroundOver
lmenustartMenuX
lmenustartMenuY
genMenuHeight
genMenuInLine
genMenuWidth

showLookupSearch
vshowItemThumbImage
vupdateItemThumbImage
itemTypesTopLabel-eng
itemTypesLabel0-eng
showItemListLabels
showHDOfromlookup
partslookuplogo

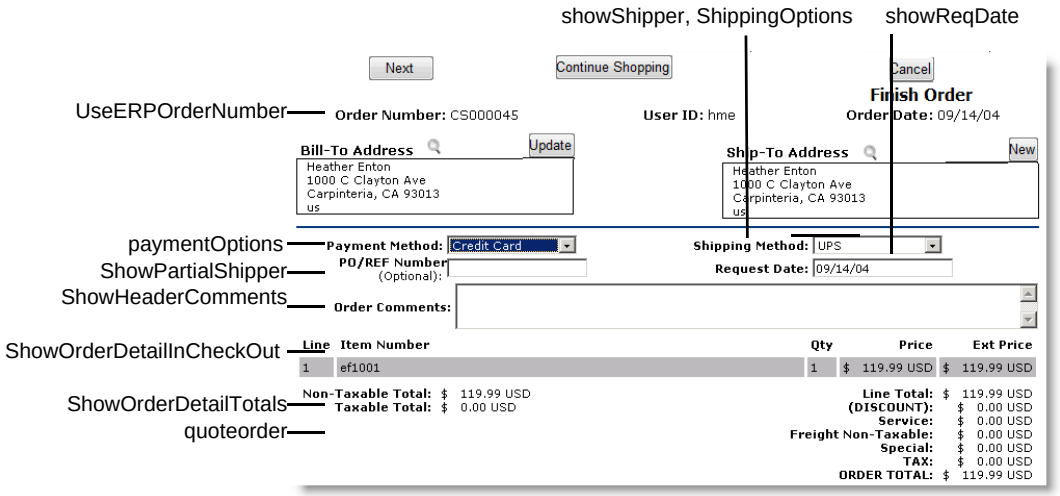


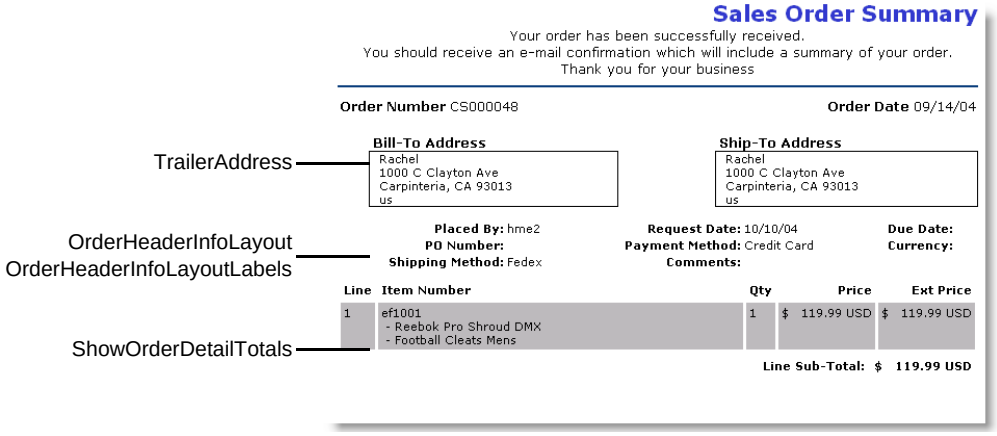

userCustomerPartNo
addNon AvailItem
QAD
QAD CSS 5.0.1
Home
Cart
Account Info
Contacts
Logout
Help
Item Number
Quantity
Enter
Submit
Our Passion. Your Advantage.
©Copyright 1997-2009 QAD Inc. | Privacy Policy | Terms of Use
Item Number
Quantity
Status
Remove?
citem1
10
Not Submitted
X
citem2
20
Not Submitted
X
HDOHeight
HDOHeightNS


ItemQuantityShow
ItemQuantityFormat
showLineReqDate
showUOM
getPriceOfConfigPartsinCart
getPriceOnAdd
Shopping Cart
Continue Ordering
Request Date
Promise Date
09/08/2009
Message
Quantity
Req Date
Prom Date
Item
UOM
Price
Ext. Price
Action
Delivery
10
09/08/2009
09/08/2009
B102001 Pro Series Tractor
Comment
EA
$ 0.00 USD
$ 0.00 USD
20
09/08/2009
09/08/2009
B102040 Massey Fergusson Tractor
Comment
EA
$ 0.00 USD
$ 0.00 USD
showExtendedPrice
Notes: -Non-inventory item -Important information about this item
Sub-Total: $ 0.00 USD
Update Cart
Empty Cart
Check Out
configReviewRequired
To change a quantity, enter the new quantity in the box next to that item.
To remove an item, enter a zero (0) in the quantity field.
Save Order Template
templateOrder
When you have completed your changes, click the update cart button to refresh this page,click the continue ordering button to save your changes and continue entering items,or click the check out button to complete the order process .

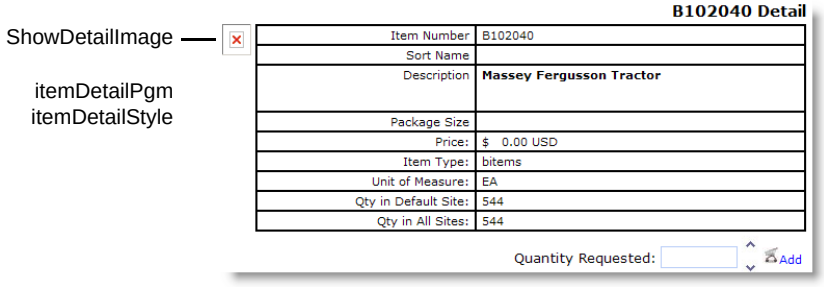

Order Template
You can DELETE an Order Template by clicking on the iconor enter a quantity to multiply all lines in the template or choose an Order Template by clicking on the Select Button. You may view the details of a(n) Order Template by clicking the name of that Order Template.
Qty
Select
FLH
useTemplateQty

showOProcStatus
Keyword Search
Search By
Customer Number
Limit Results To
Begins With
Sort By
Order Number
Pending Orders
Submitted Orders
Show Orders
Order Processing
Order Number
Order Date
Sold-To
User ID
Message
Order Status
SO118
07/28/09
B2C
b072902
created
SO119
07/28/09
B2C
b072903
created
SO120
07/28/09
B2C
b072904
created
SO123
07/28/09
B2C
b072905
created
SO124
07/28/09
B2C
b072906
created
6 to 10 of 13
Lines per page: 5
1 2 3


showShipper, ShippingOptions
showReqDate
Next
Continue Shopping
Cancel
UseERPOrderNumber
Order Number: CS000045
User ID: hme
Finish Order
Order Date: 09/14/04
Bill-To Address
Update
Heather Enton
1000 C Clayton Ave
Carpinteria, CA 93013
us
Ship-To Address
New
paymentOptions
Payment Method: Credit Card
Shipping Method: UPS
ShowPartialShipper
PO/REF Number (Optional):
Request Date: 09/14/04
ShowHeaderComments
Order Comments:
ShowOrderDetailInCheckOut
Line
Item Number
Qty
Price
Ext Price
1
ef1001
1
$ 119.99 USD
$ 119.99 USD
ShowOrderDetailTotals
Non-Taxable Total: $ 119.99 USD
Taxable Total: $ 0.00 USD
Line Total: $ 119.99 USD
(DISCOUNT): $ 0.00 USD
Service: $ 0.00 USD
Freight Non-Taxable: $ 0.00 USD
Special: $ 0.00 USD
TAX: $ 0.00 USD
ORDER TOTAL: $ 119.99 USD
quoteorder


Sales Order Summary
Your order has been successfully received.
You should receive an e-mail confirmation which will include a summary of your order.
Thank you for your business
Order Number CS000048
Order Date 09/14/04
TrailerAddress
Bill-To Address
Rachel
1000 C Clayton Ave
Carpinteria, CA 93013
us
Ship-To Address
Rachel
1000 C Clayton Ave
Carpinteria, CA 93013
us
OrderHeaderInfoLayout
OrderHeaderInfoLayoutLabels
Placed By: hme2
PO Number:
Shipping Method: Fedex
Request Date: 10/10/04
Payment Method: Credit Card
Comments:
Due Date:
Currency:
Line
Item Number
Qty
Price
Ext Price
1
ef1001
- Reebok Pro Shroud DMX
- Football Cleats Mens
1
$ 119.99 USD
$ 119.99 USD
ShowOrderDetailTotals
Line Sub-Total: $ 119.99 USD

Order Summary
CS000003 Summary Copy Order
ReportOrderCopy
Sold-To: Big Sports 1234 My Street Summerland CA 90210 United States of America
Bill-To: Big Sports 1234 My Street Summerland CA 90210 United States of America
Ship-To: Big Sports 1234 My Street Summerland CA 90210 United States of America
Order Date: 03/04/04 Currency: USD SalesPerson(s): Adams, Harry
Line
Item
UM
Quantity Ordered
Quantity Open
Quantity Allocated
Quantity Picked
Quantity Shipped
Due Date
1
ac1001
EA
1
1
0
0
0
03/05/04
This report was generated by QAD CSS.
reportFooterLogo
hostURL


B102040 Detail
ShowDetailImage
itemDetailPgm
itemDetailStyle
Item Number B102040
Sort Name
Description Massey Fergusson Tractor
Package Size
Price: $ 0.00 USD
Item Type: bitems
Unit of Measure: EA
Qty in Default Site: 544
Qty in All Sites: 544
Quantity Requested:
Add

Product Information Resources

QAD offers a number of online resources to help you get more information about using QAD products.

QAD Forums (community.qad.com)
Ask questions and share information with other members of the user community, including QAD experts.

QAD Knowledgebase (knowledgebase.qad.com)*
Search for answers, tips, or solutions related to any QAD product or topic.

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Get browser-based access to user guides, release notes, training guides, and so on; use powerful search features to find the document you want, then read online, or download and print PDF.

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*Log-in required

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