Web UI Overview

Demonstration Guide

Overview

This demonstration focuses on how the Channel Islands User Experience (Web UI) empowers the Effective User – where user tasks are streamlined, accelerated by supporting systems, and perfectly aligned with the company's business processes.

Demonstration Scope

In this demonstration you will see how users can access QAD Cloud ERP from any browser or device, with complete role-based security and easy navigation.

You will see how users can quickly access just the information they need, personalized to your unique business process and their user preferences.

You will also see how users at all levels of the organization will leverage actionable insights to enhance decision making and improve performance, by focusing attention on potential issues; and leverage built-in workflow, alerts and notifications to speed up response.

That's Next Generation ERP.

Rapid – Agile – Effective.

Demonstration Steps

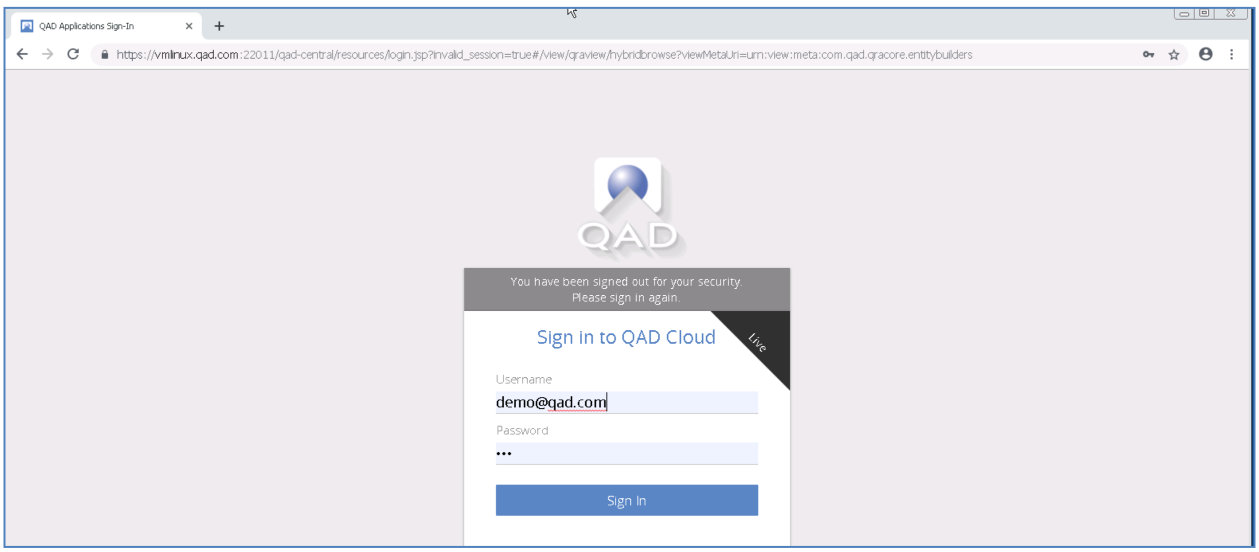
UI Freedom

Begin by signing in to QAD Cloud ERP. You can use any internet browser or mobile device. There is no need to connect to a VPN, download or install anything.

The application is device independent but with complete security. QAD uses the highest level of SSL encryption available and allowed by the U.S. government, and supports a single sign on.

Demo

1. Launch Web UI
2. Enter Username demo@qad.com, Password **qad**



3. Click **Sign In**

Key Points

- Device independent
- Single Sign On (SSO)

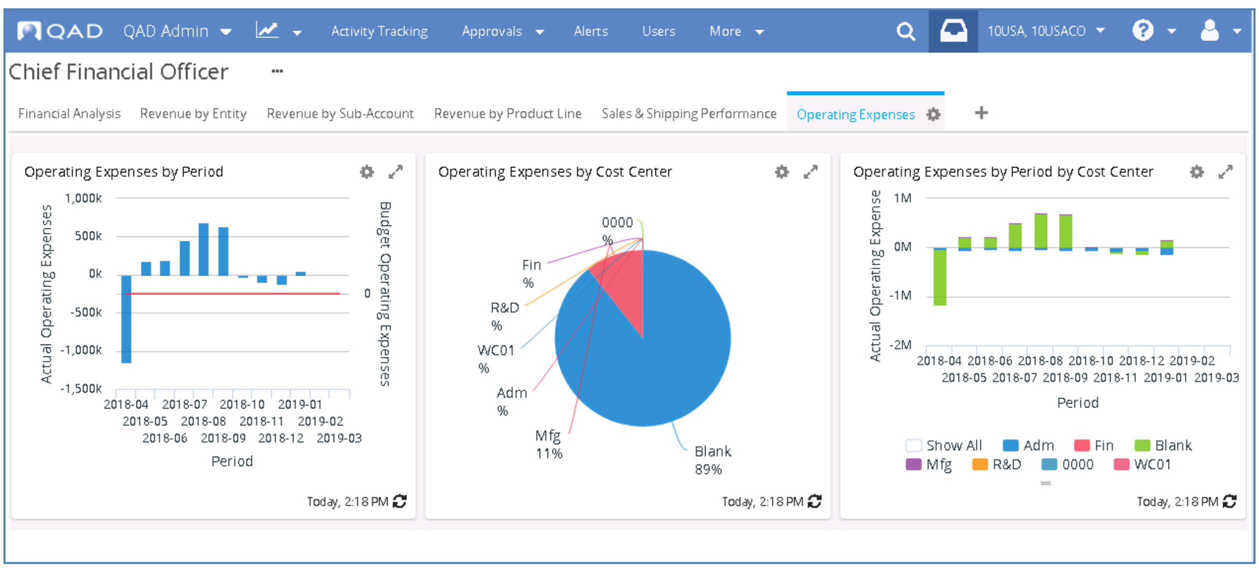
Actionable Insights

Fundamental to the Web UI are the Action Centers, providing at-a-glance insight into Key Performance Indicators and set up by role. Optionally the Action Center can be the first thing the user sees each day when they sign on.

Within any Action Center you can have multiple visuals – each representing a KPI – segmented into multiple tabs. When you see something that doesn't look right – for example, why is working capital going down – you can easily drill down to the details and optionally export them to an Excel file or create a PDF.

Demo

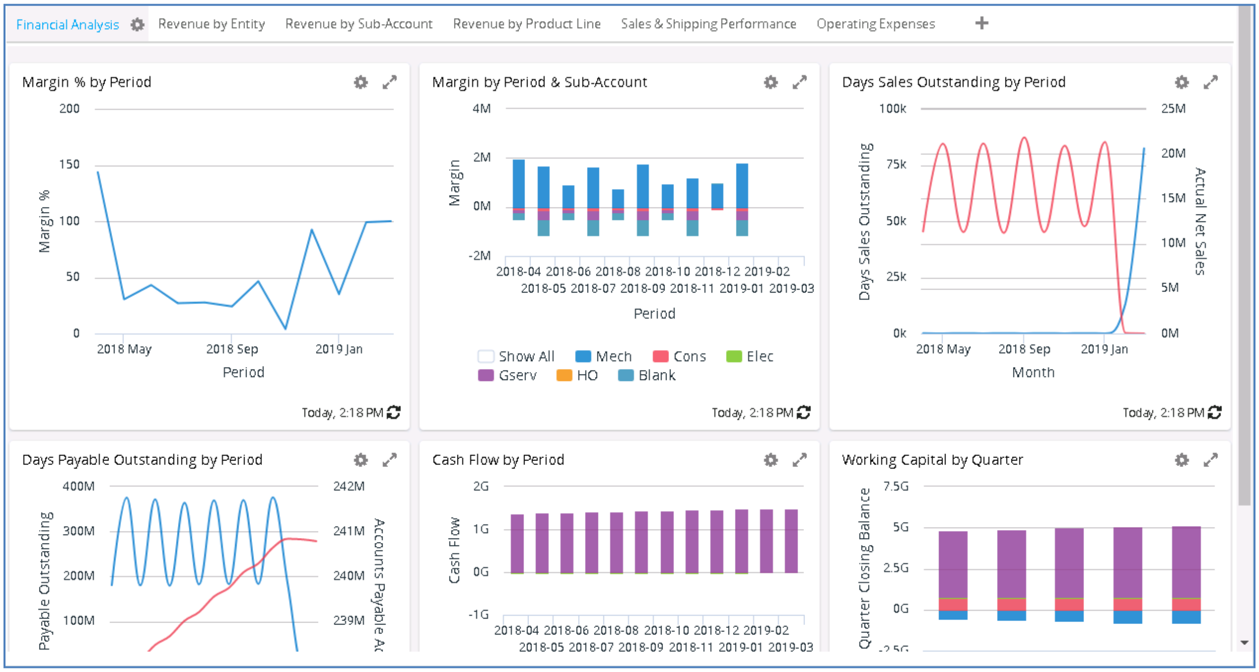
1. On Toolbar, click Action Center icon
2. Select **Chief Financial Officer**



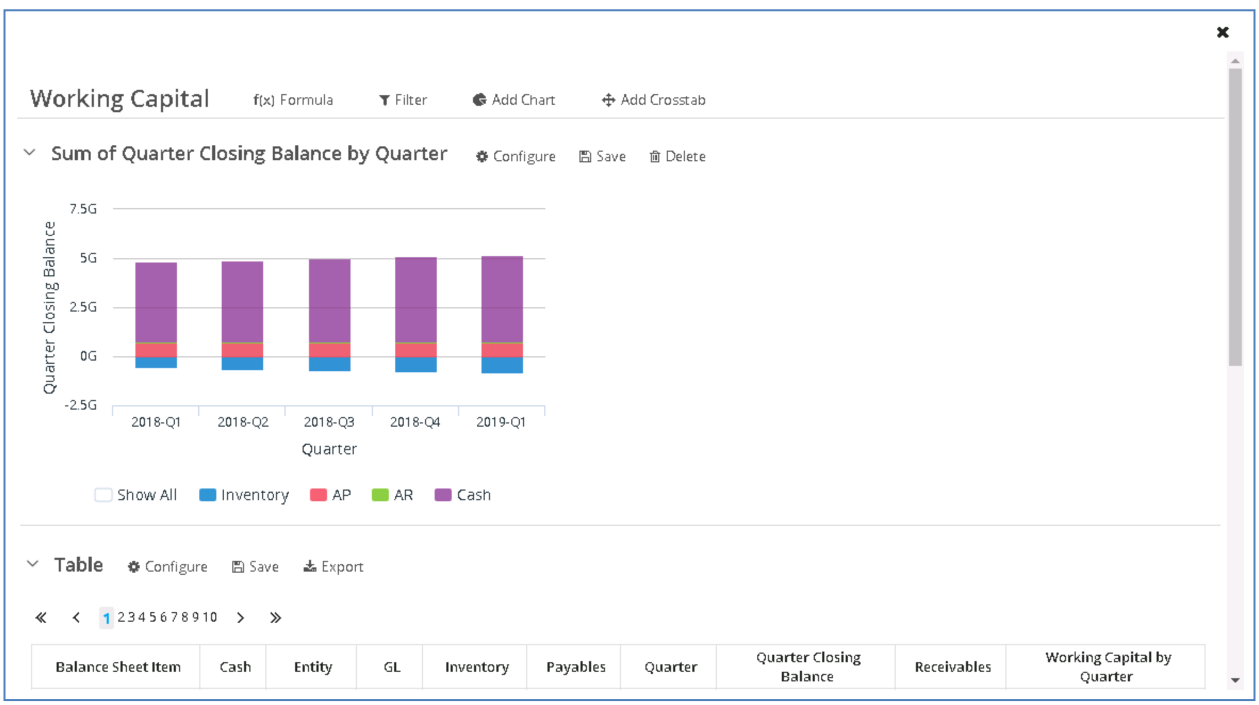
3. On Toolbar, click User icon

Note: set current as home

4. In CFO Action Center, click **Financial Analysis** tab

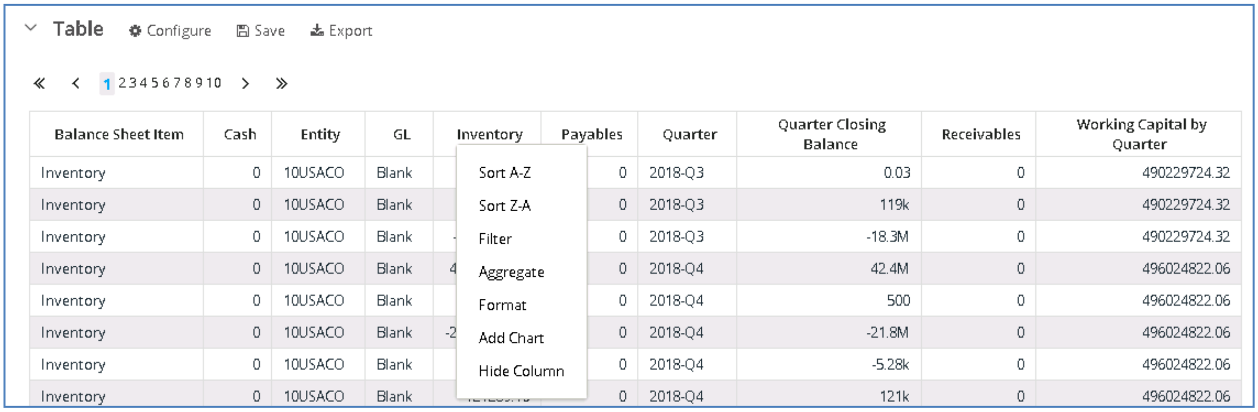


5. In **Working Capital by Quarter**, hover-over graph points
6. Click Drill-out  icon



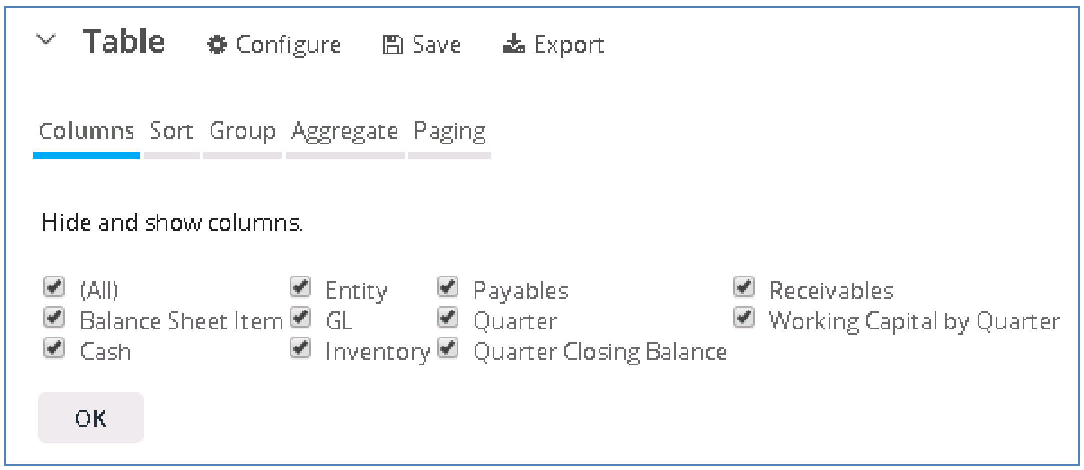
7. In Table, click any column

Note option to sort, filter, aggregate or summarize



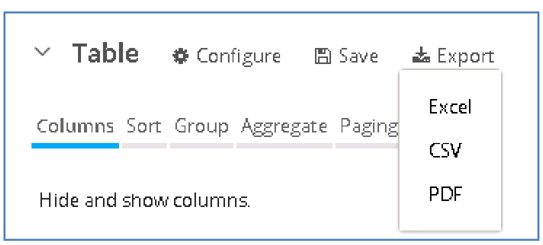
Balance Sheet Item	Cash	Entity	GL	Inventory	Payables	Quarter	Quarter Closing Balance	Receivables	Working Capital by Quarter
Inventory	0	10USACO	Blank		0	2018-Q3	0.03	0	490229724.32
Inventory	0	10USACO	Blank		0	2018-Q3	119k	0	490229724.32
Inventory	0	10USACO	Blank	-	0	2018-Q3	-18.3M	0	490229724.32
Inventory	0	10USACO	Blank	4	0	2018-Q4	42.4M	0	496024822.06
Inventory	0	10USACO	Blank		0	2018-Q4	500	0	496024822.06
Inventory	0	10USACO	Blank	-2	0	2018-Q4	-21.8M	0	496024822.06
Inventory	0	10USACO	Blank		0	2018-Q4	-5.28k	0	496024822.06
Inventory	0	10USACO	Blank	[illegible]	0	2018-Q4	121k	0	496024822.06

8. Click ⚙ Configure



9. Click Export

Note options to export to Excel, CSV, PDF



10. Close window

Key Points

- Action Centers by role
- Drill down to details
- Massage data there or export

Security and Control

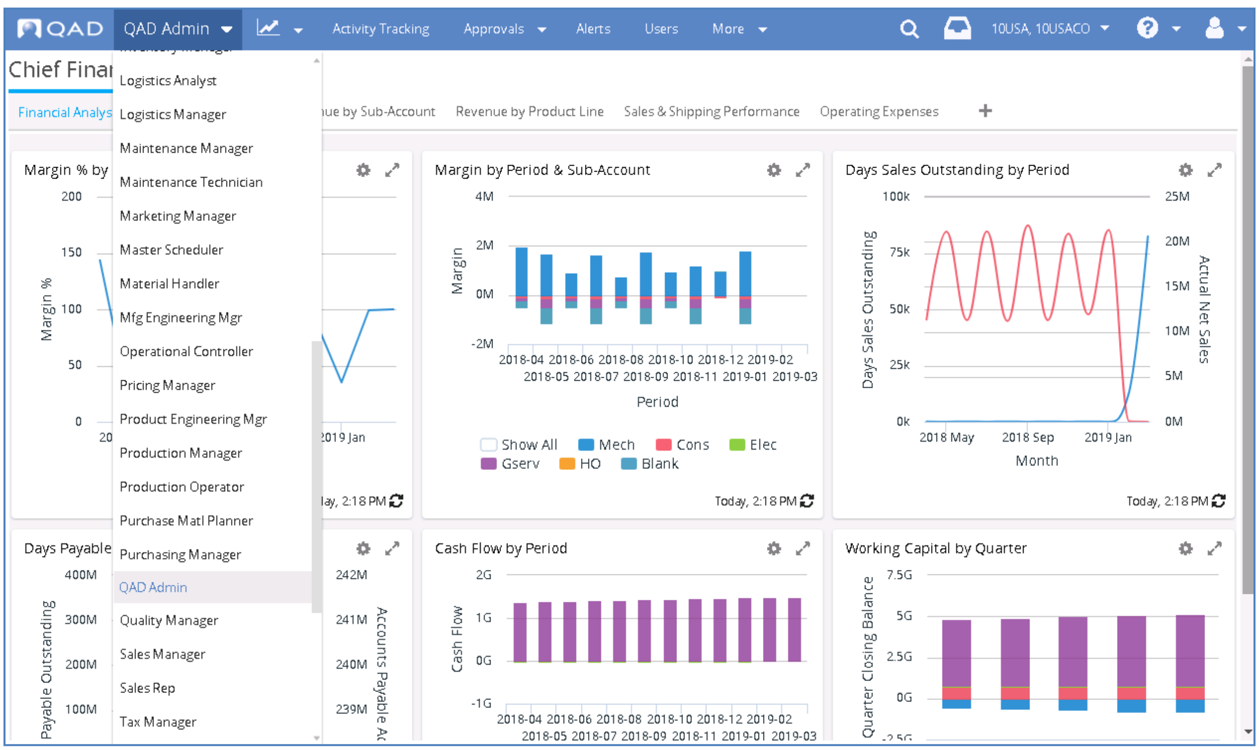
The user logon determines what Action Centers and Menus the user has access to. These are based on role. Any user can belong to one or more roles. When they change roles; the menu bar changes.

Sign on as a different user and you will see an entirely different set of menus.

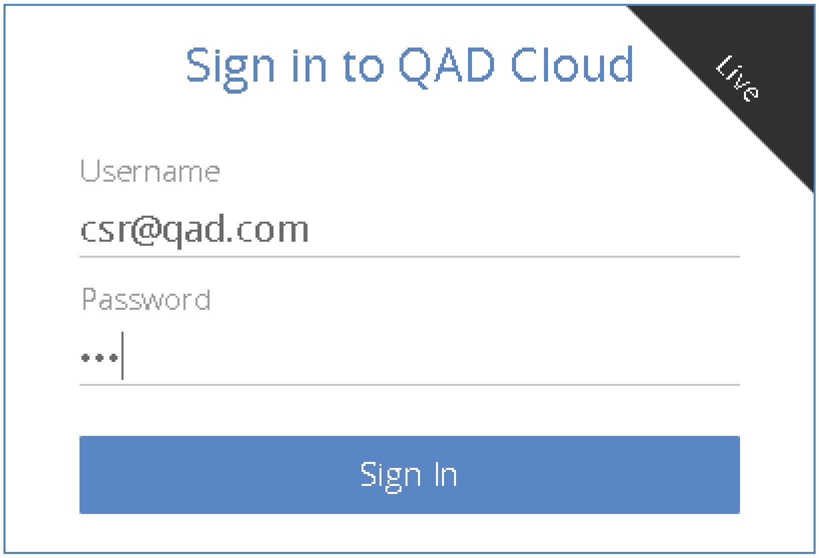
Role-based menus ensure users see only what they need and nothing they don't.

Demo

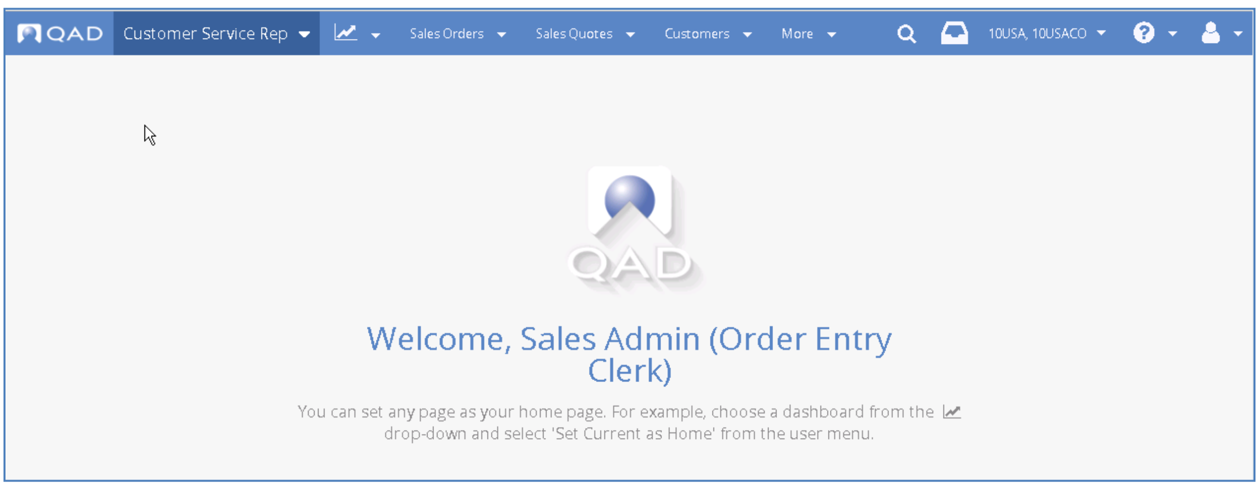
1. On Toolbar, select **QAD Admin** role for user demo



2. (Optionally) select a different role
3. Launch another Web UI session
4. Enter Username csr@qad.com, Password **qad**



5. Select **Customer Service Rep** role



Key Points

- Action Centers and Menus by role
- Users assigned to one or more roles

Favorites

Each user can personalize their workspace, usually starting by setting up their own set of Favorites. Typically Favorites will include the things they do most frequently or activities they need to do on a regular basis.

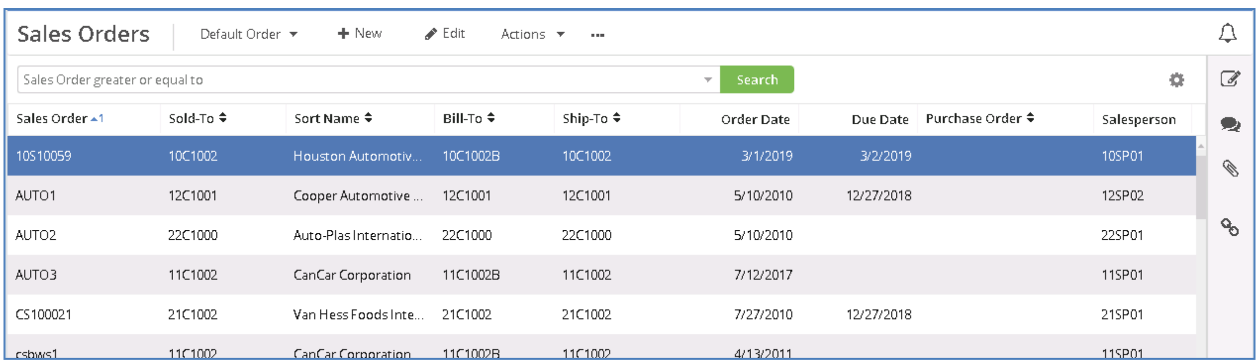
This essentially allows the user to define their own personal set of menus on their toolbar, to display each time the sign in.

Any function that the user has security access to can be added to their Favorites, and optionally grouped.

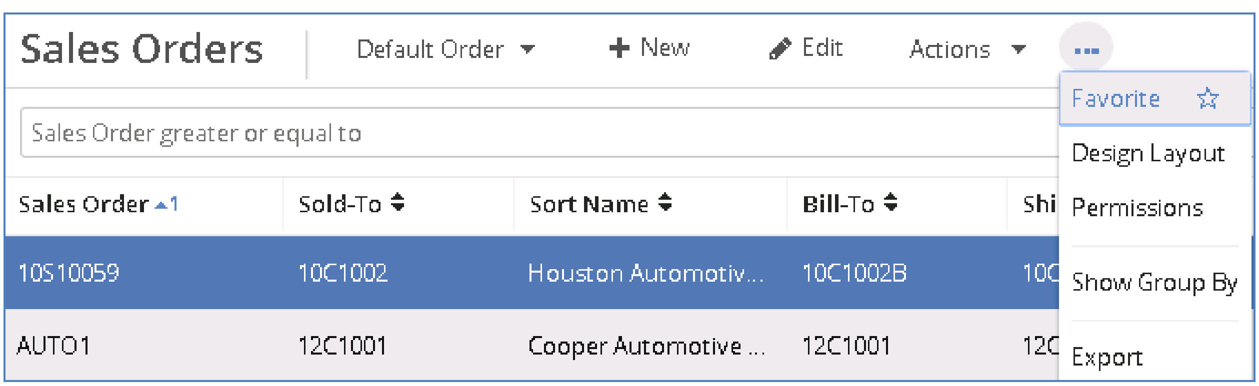
Demo

1. In Menu, select **Sales Orders** drop-down
2. Select **Sales Orders**

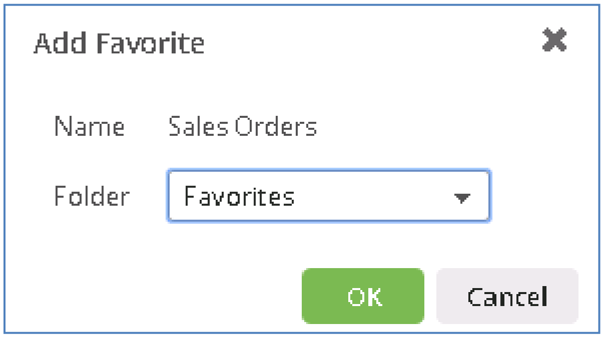
Note this begins with a "View Grid" – more on this later



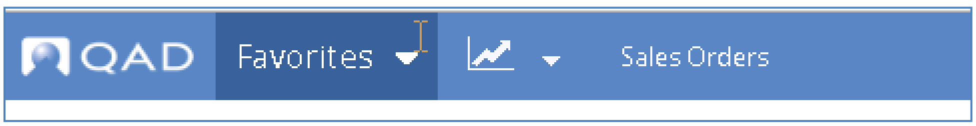
3. Click More ··· icon



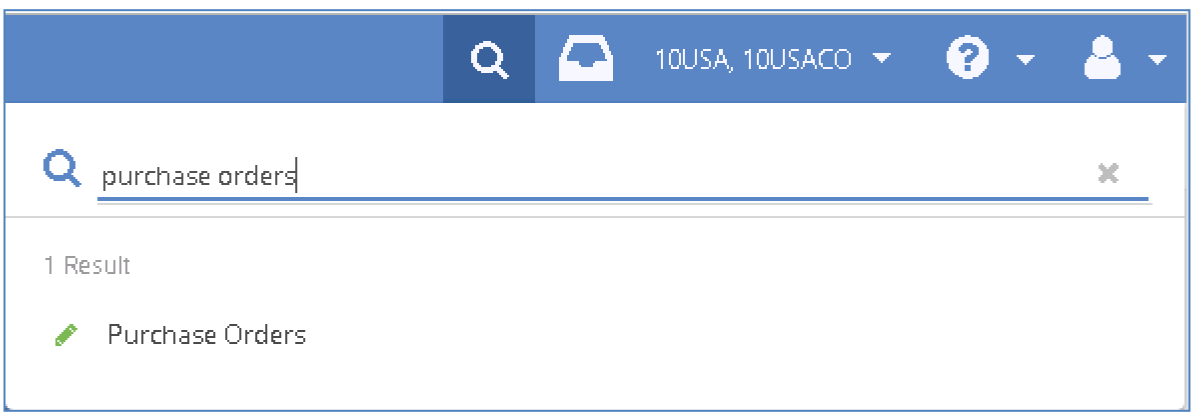
4. Click Favorite ☆



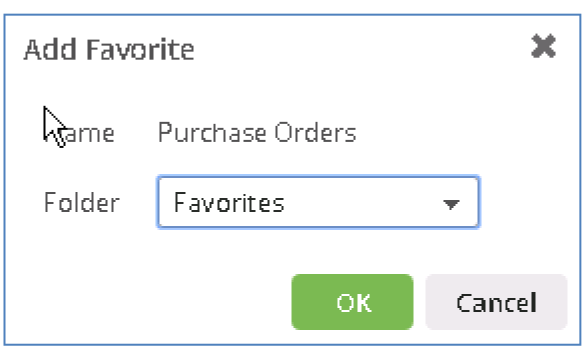
5. Click **OK**
6. On Toolbar, click Customer Service Rep drop-down
7. Select **Favorites**



8. On Toolbar, click Search icon
9. Enter **Purchase Orders**

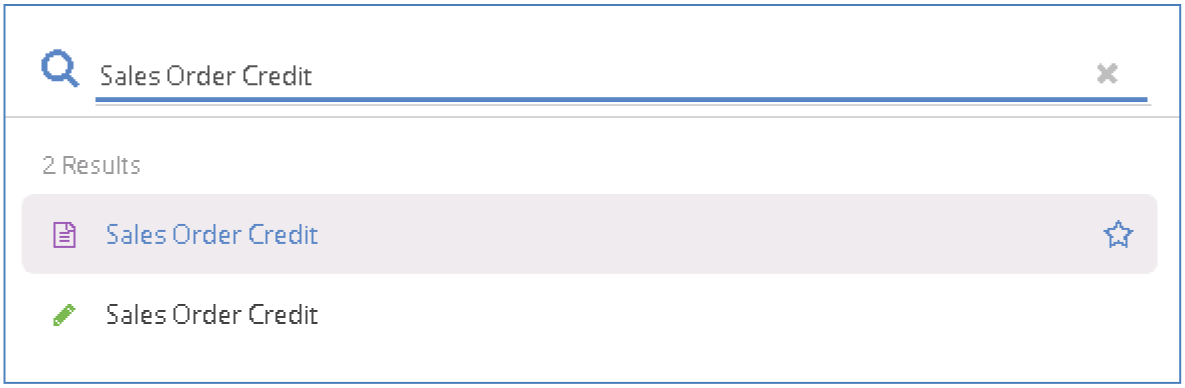


10. Click Favorite icon

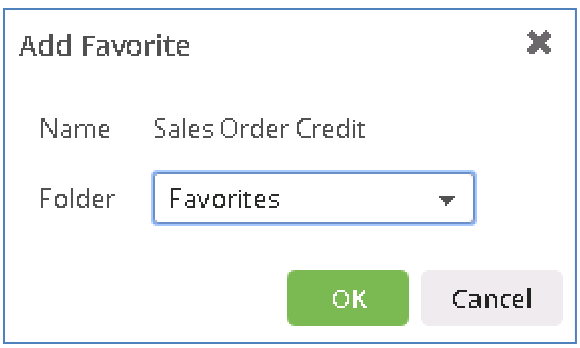


11. Click **OK**
12. In Search, enter **Sales Order Credit**

Note there are two – a "pencil" for editing sales order credit and a report

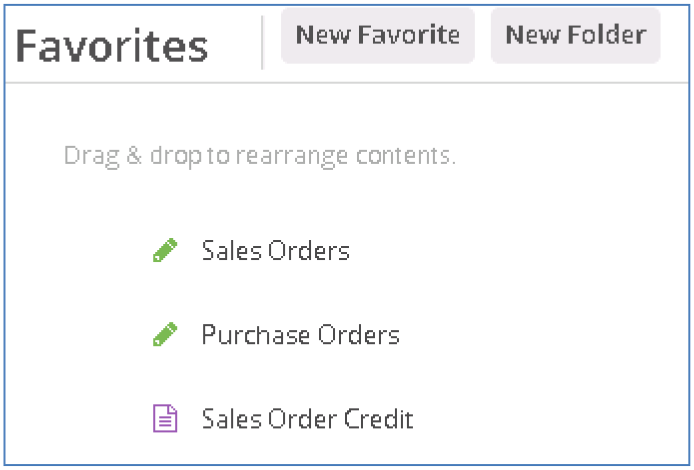


13. On report, click Favorite icon

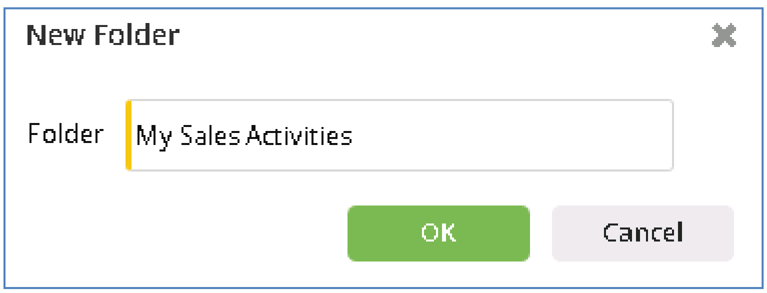


14. Click **OK**

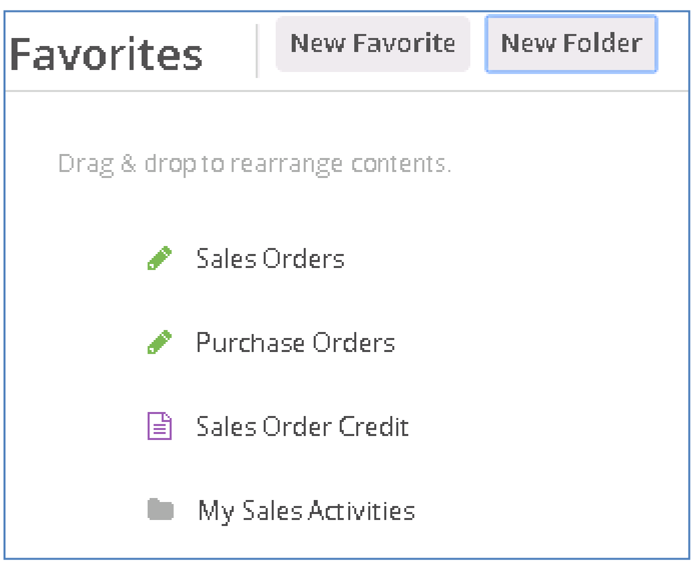
15. Click User icon, select **Favorites**



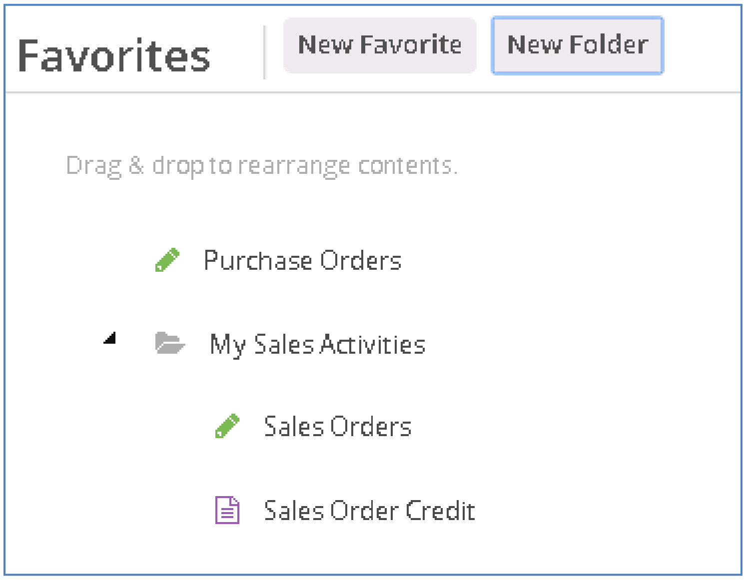
16. Click **New Folder**
17. Enter Folder **My Sales Activities**



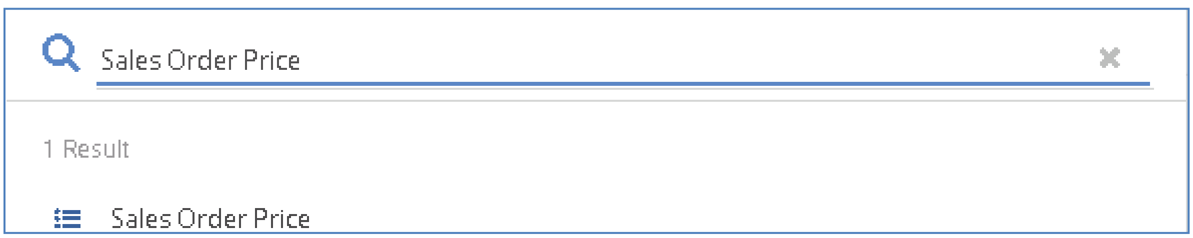
18. Click **OK**



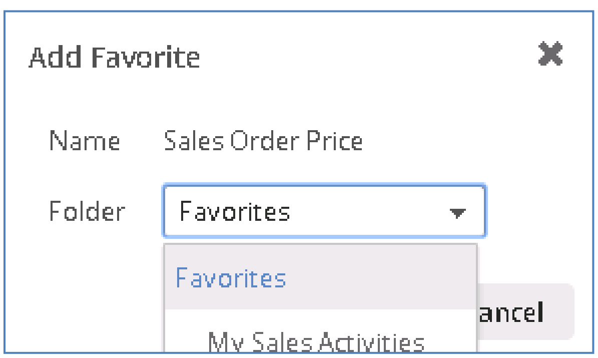
19. Drag & drop Sales Orders and Sales Order Credit to My Sales Activities folder



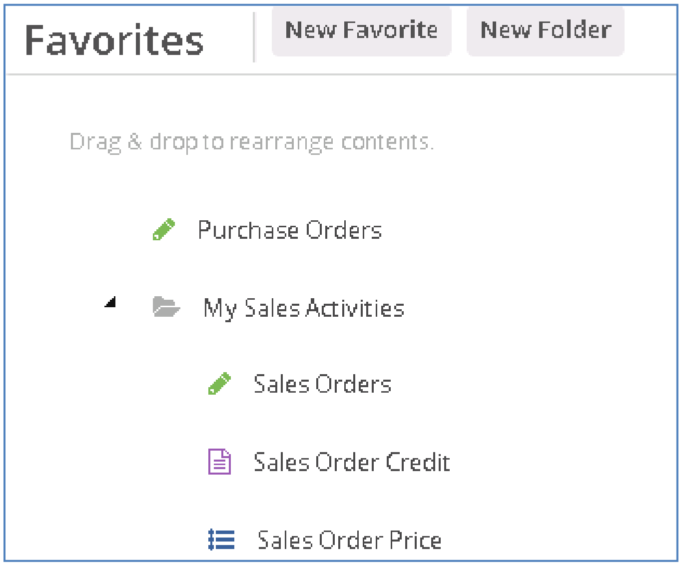
20. On Toolbar Search, enter **Sales Order Price**



21. Click Favorite icon
22. In Folder, click drop-down



23. Select **My Sales Activities**
24. Click **OK**



Key Points

- User Favorites menu
- Optional groupings

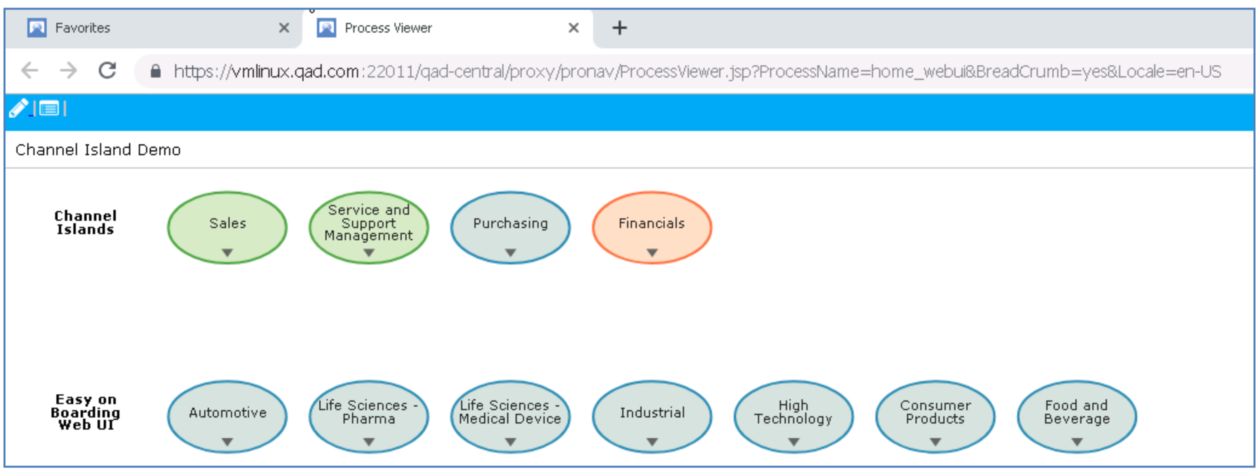
Process Maps

Frequent users will use the drop-down menus or Favorites. New or infrequent users may need more guidance in terms of the business process.

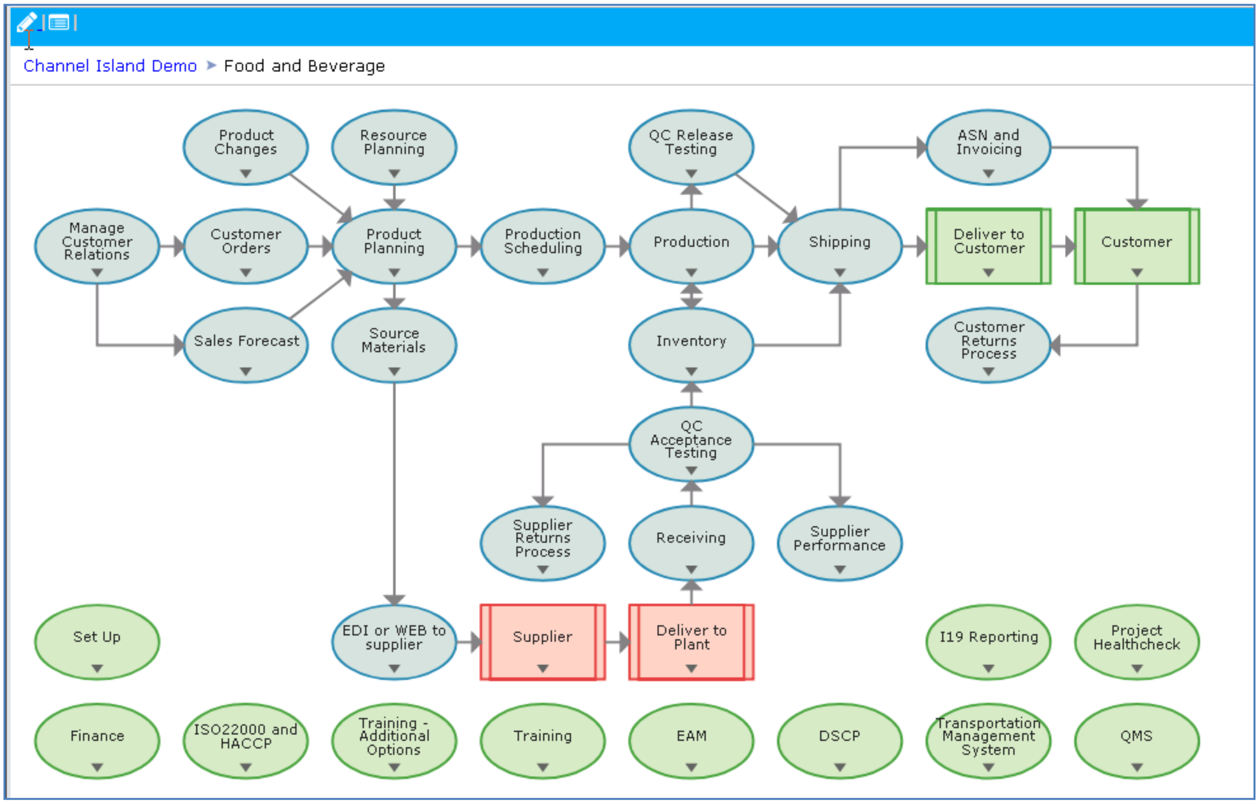
They can see an overview of the flow and access functions directly from QAD's signature process maps. Not only do these maps provide step-by-step guidance, they are based on industry "best practice" processes, tailored to your company's unique business.

Demo

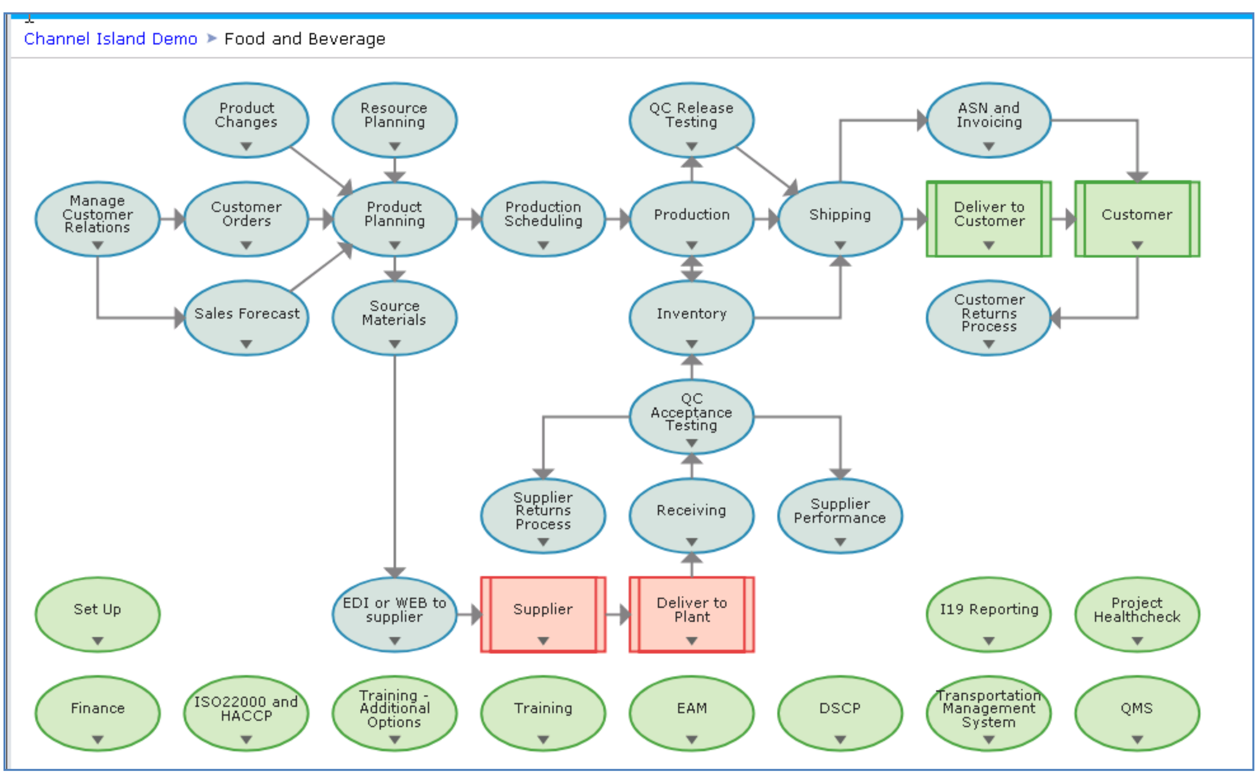
1. On Toolbar, click  Process Maps



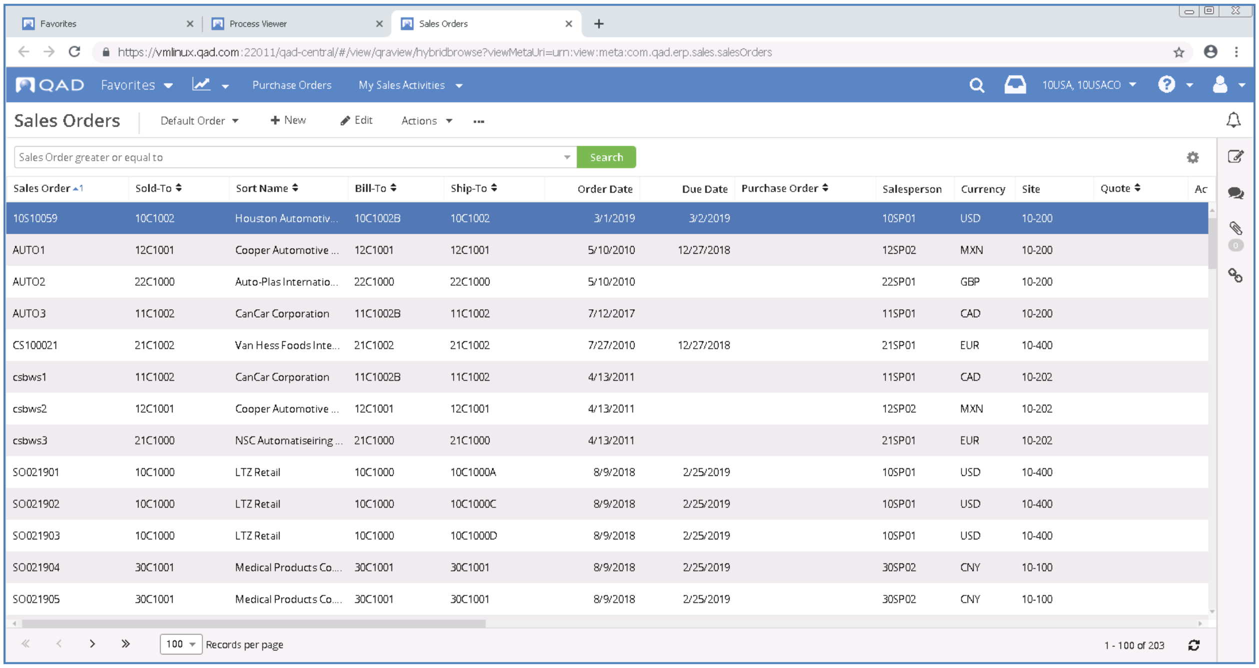
2. In Process Viewer tab, click **Easy On Boarding Web UI** > vertical process map



3. Click **Customer Orders** node



4. Click **Create Sales Order** node



Key Points

- Process maps for new or infrequent users
- Step-by-step guidance
- Industry best practice
- Tailored by company

View Grids

All of the edit-capable functions in the Web UI (these are functions identified with the Pencil icon) begin with a view grid. For example, here when you selected Sales Orders, you got a list (or view) of all the sales orders in your domain.

This is one of the most powerful screens in the application; letting users quickly and easily drill into just the information they need, displayed exactly as they need it.

Powerful search functions let the user enter one or more search criteria, using operators like equals, not equals, contains, greater than, less than, is null, is not null, and so on. These may be one-time searches, or the user can store the search for re-use.

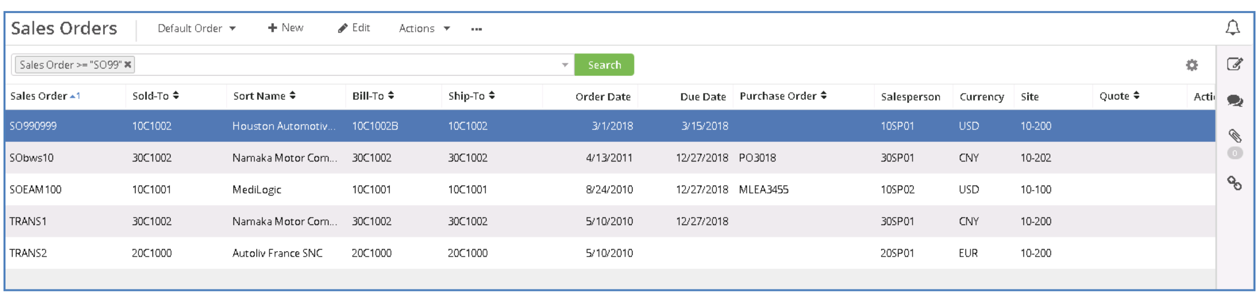
The system also supports contextual search … simply type the characters you are searching for and the system highlights lines with this value.

Other capabilities within any grid view, include the ability to sort, re-sequence, resize and remove columns, and optionally save the personalized view for reuse.

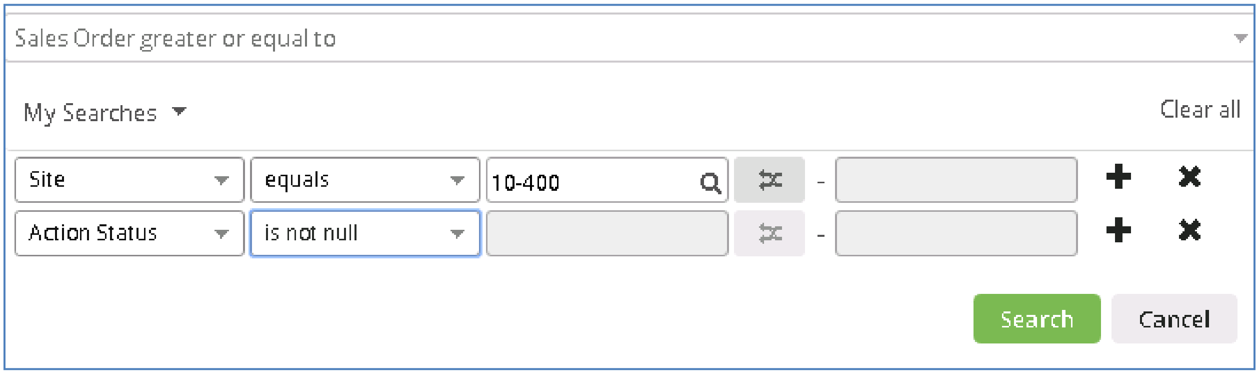
If you need to further manipulate the data or create graphics, you can easily export the selected lines to Excel. Or you can do further manipulation on screen, using group by to create one or more groups.

Demo

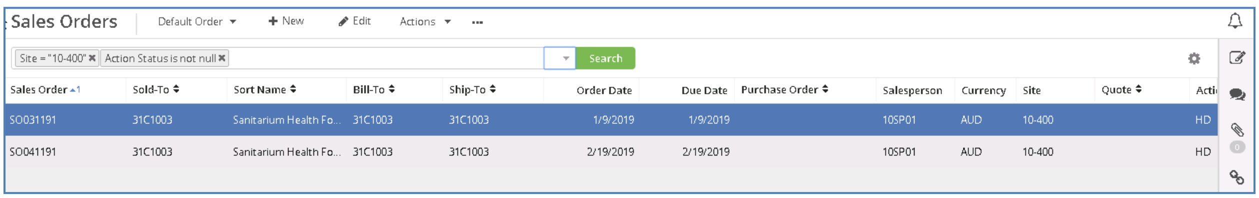
1. In Search box, enter **SO99**



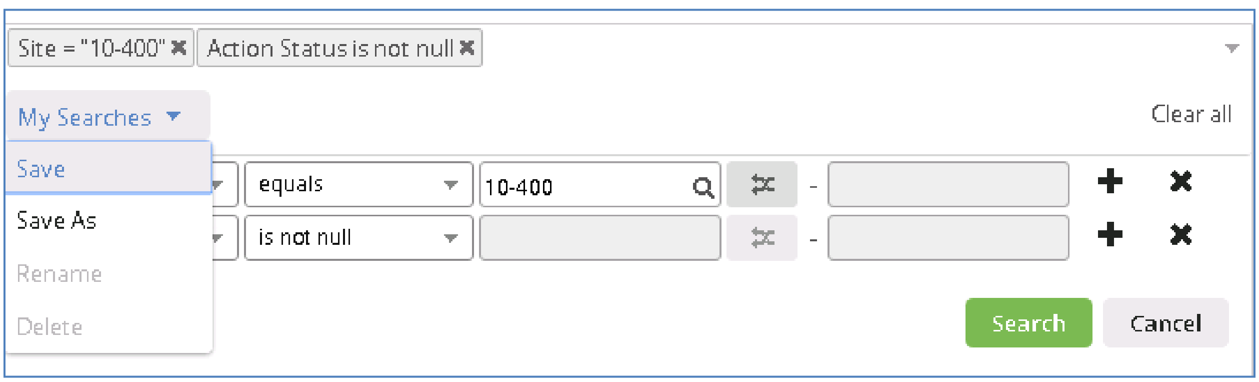
2. Click x to remove search
3. In Search, click drop-down
4. Enter **Site equals 10-400**
5. Enter **+ Action Status not null**



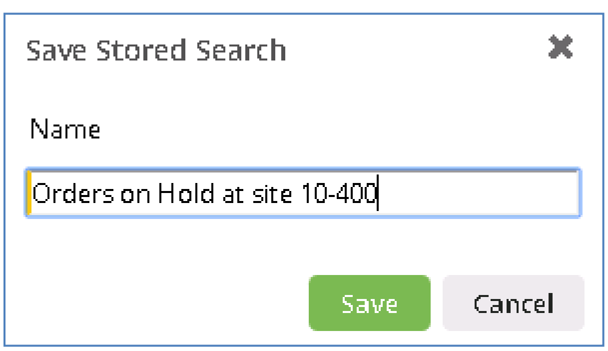
6. Click **Search**



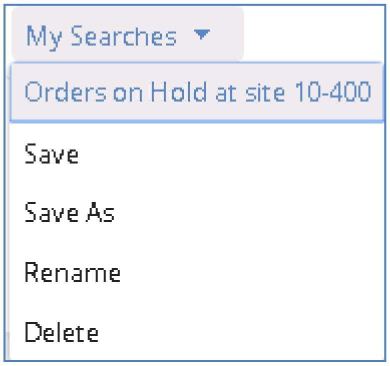
7. In Search drop-down, click **My Searches**



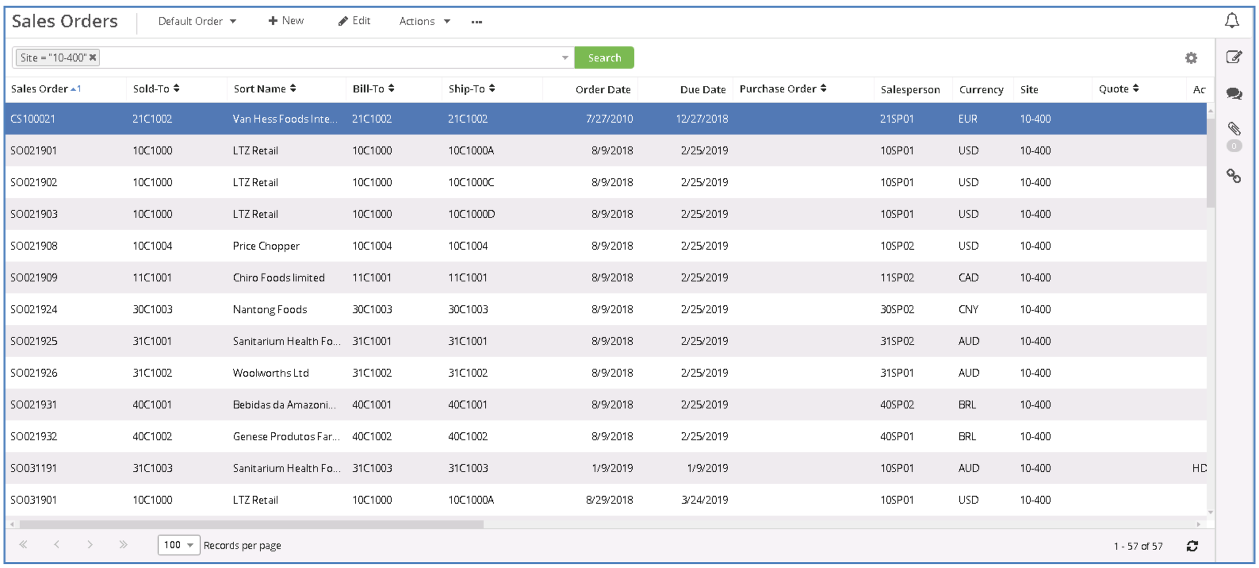
8. Click **Save As**
9. Enter name **Orders on Hold at site 10-400**



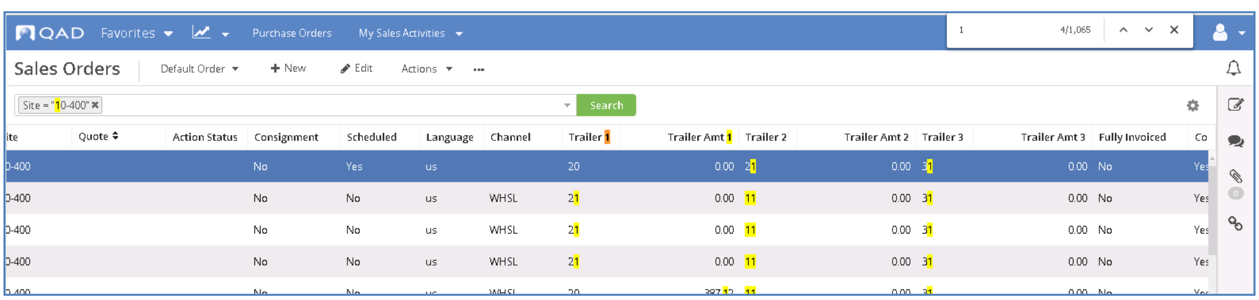
10. Click **Save**
11. In Save As, click drop-down



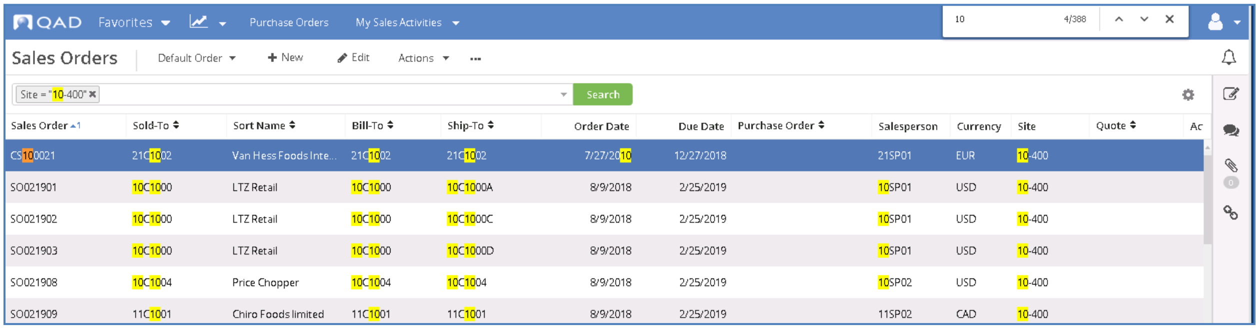
12. Click **x** to remove search on Action Status
13. Click **Search**



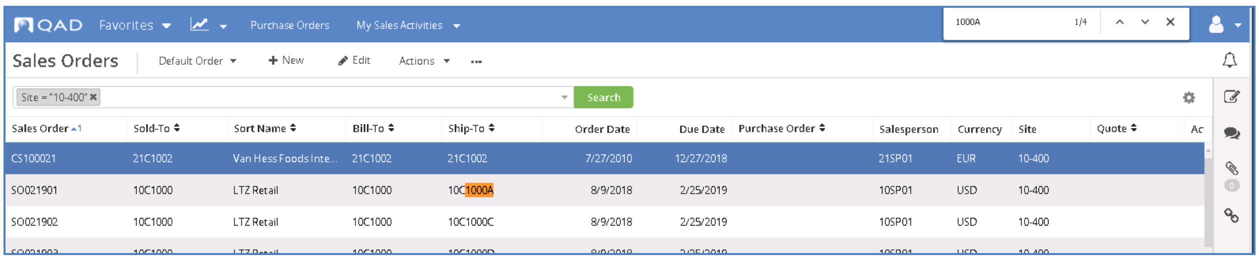
14. Click **CTRL + F**
15. Enter **1**



16. … then **0**



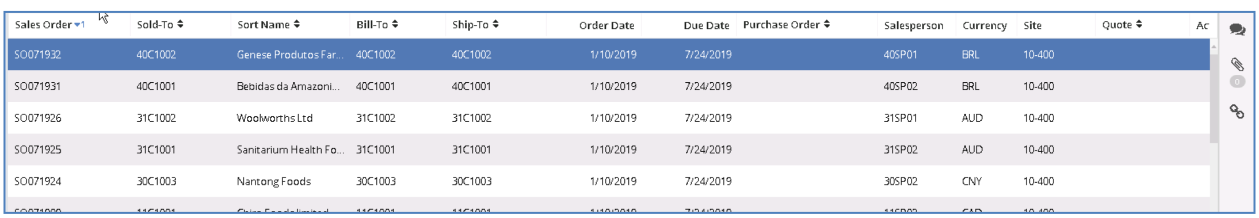
17. … then **00A**



18. Close search box

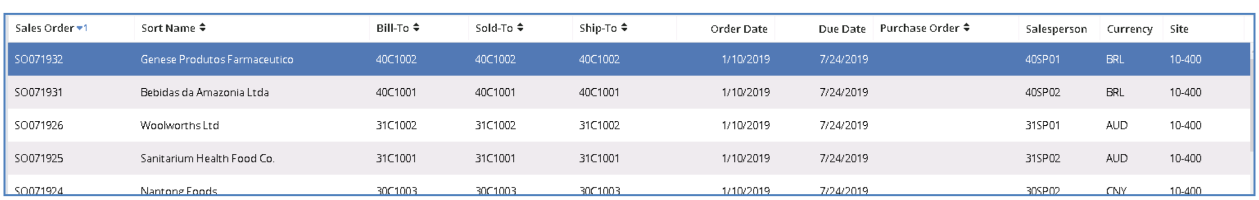
19. Click Sales Order to sort

Note this changed the sort from ascending to descending

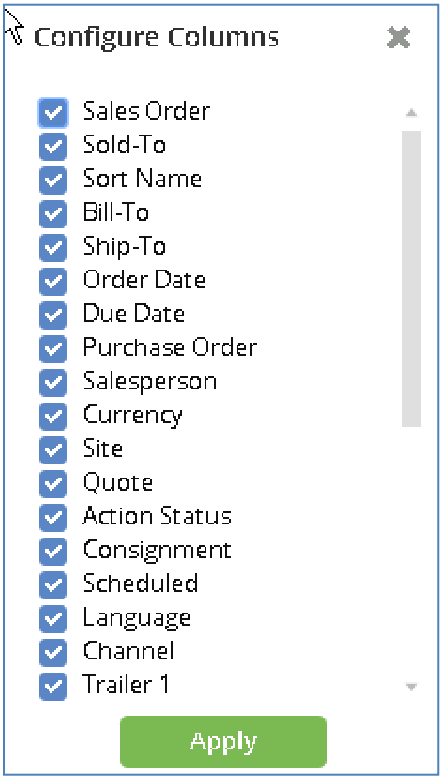


20. Drag and drop Sold-To to right of Sort Name

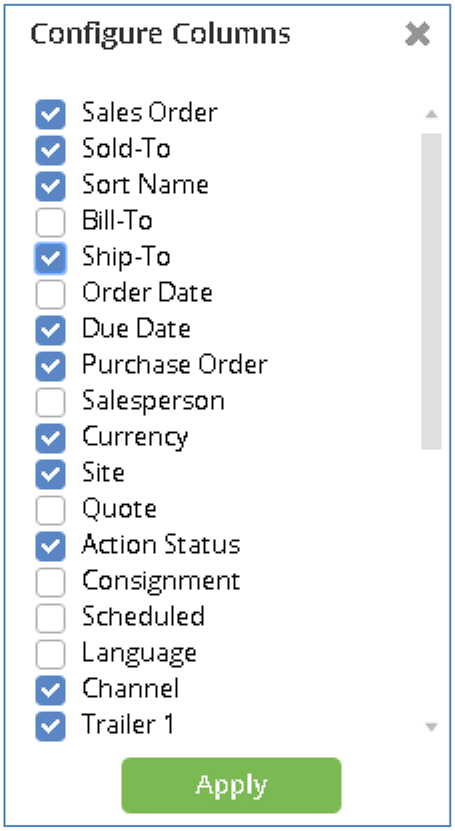
21. Resize Sort Name column



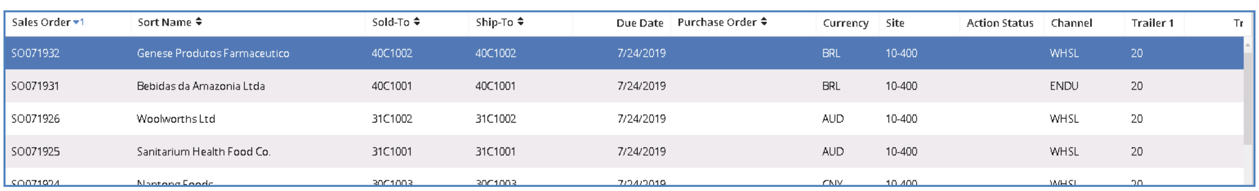
22. Click Settings icon



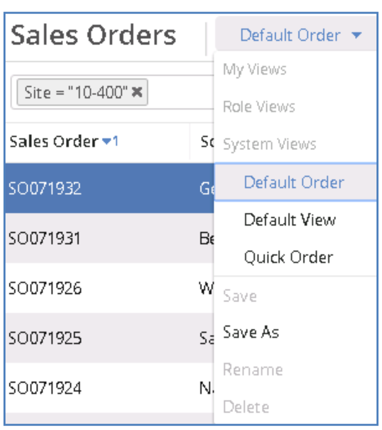
23. Uncheck **Bill-To, Order Date, Salesperson, Quote, Consignment, Scheduled, Language**



24. Click **Apply**

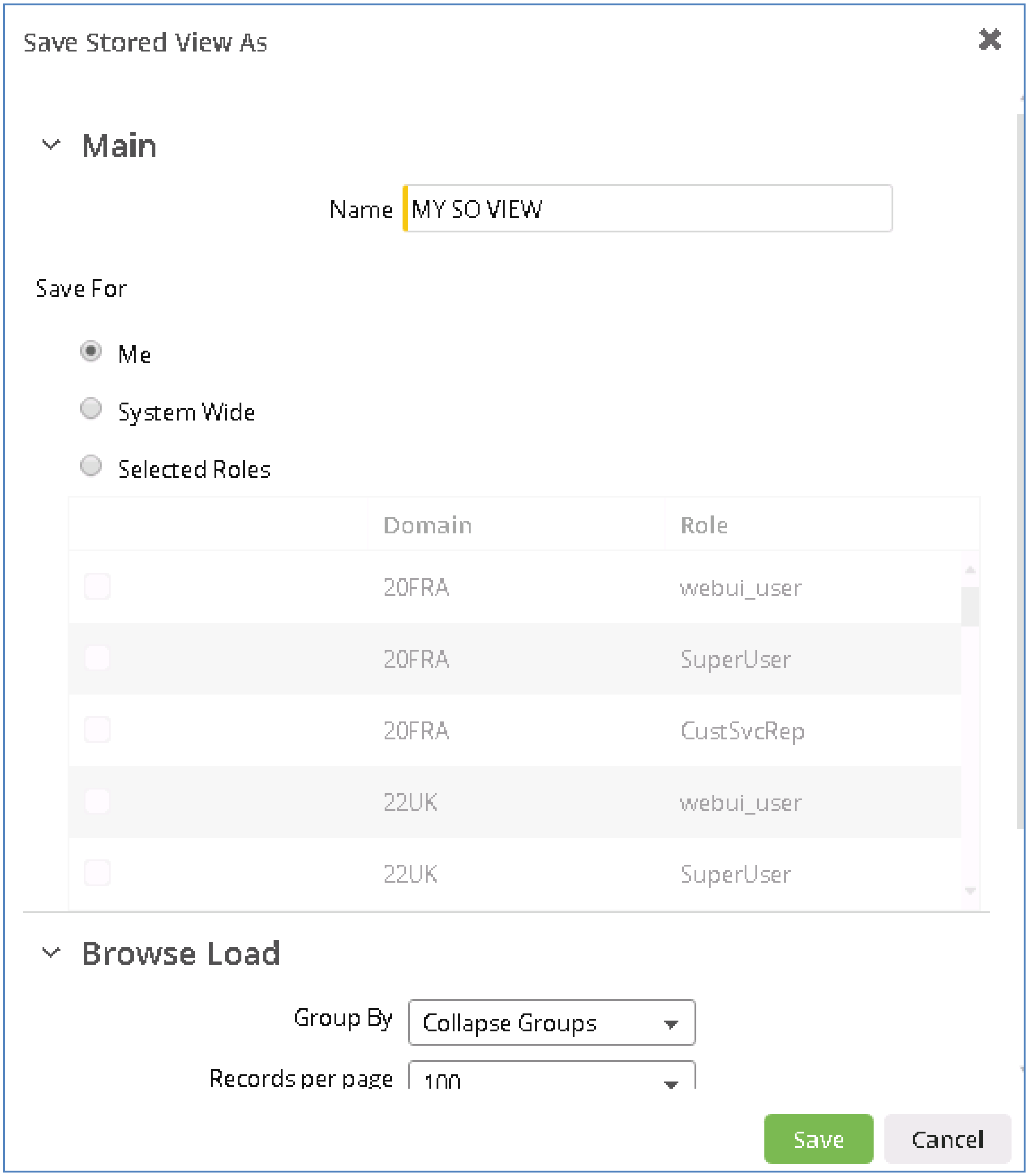


25. Click **Default Order** drop-down



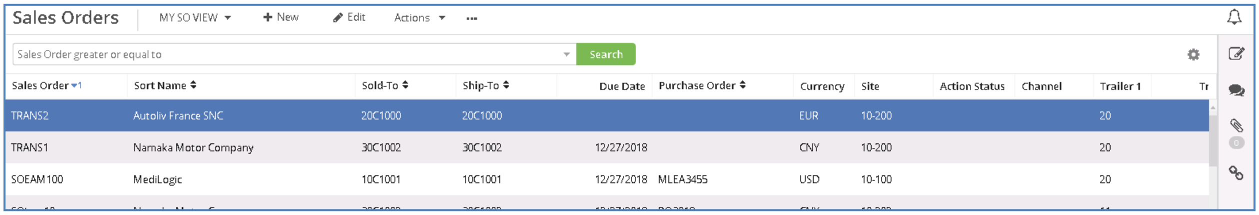
26. Select **Save As**

27. Enter **My SO View, Save for Me**

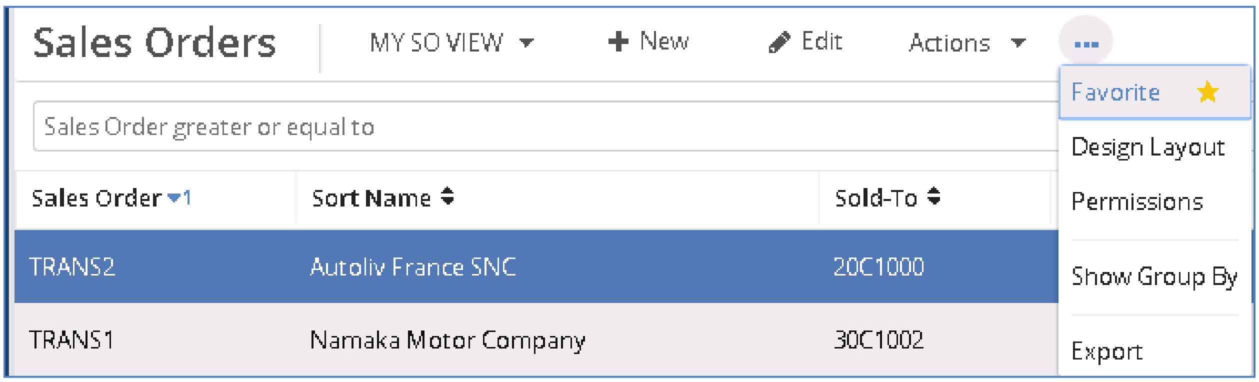


28. Click **Save**

Note default view is now MY SO VIEW

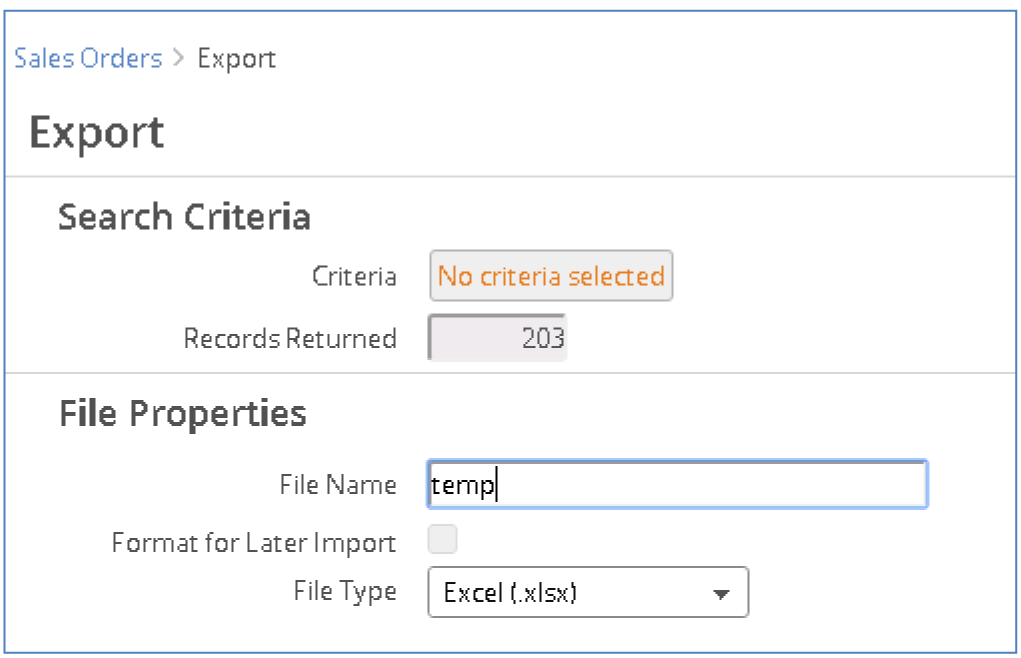


29. Click More ··· icon

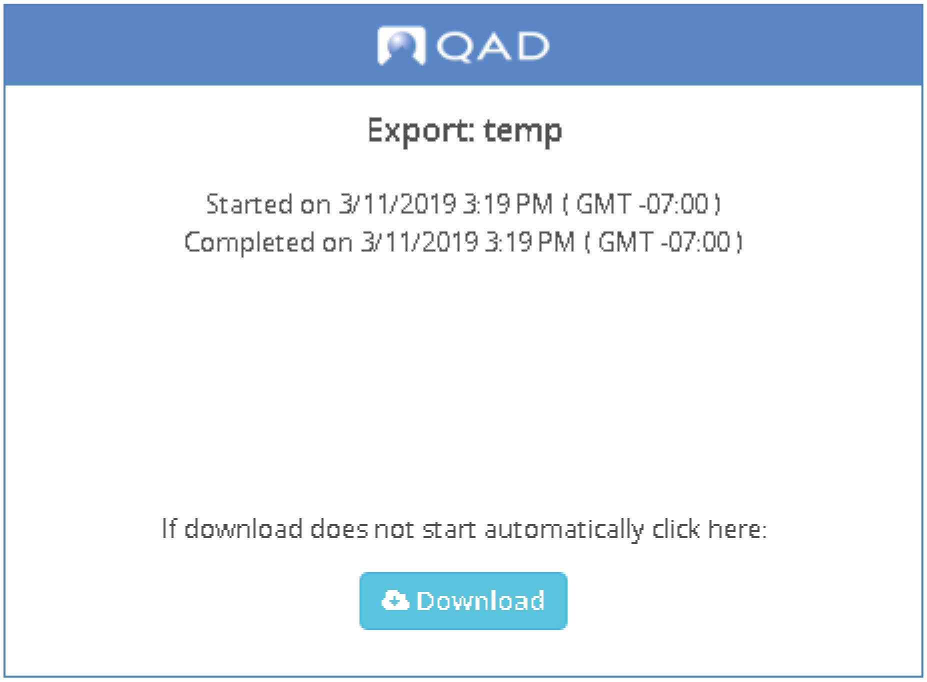


30. Select **Export**

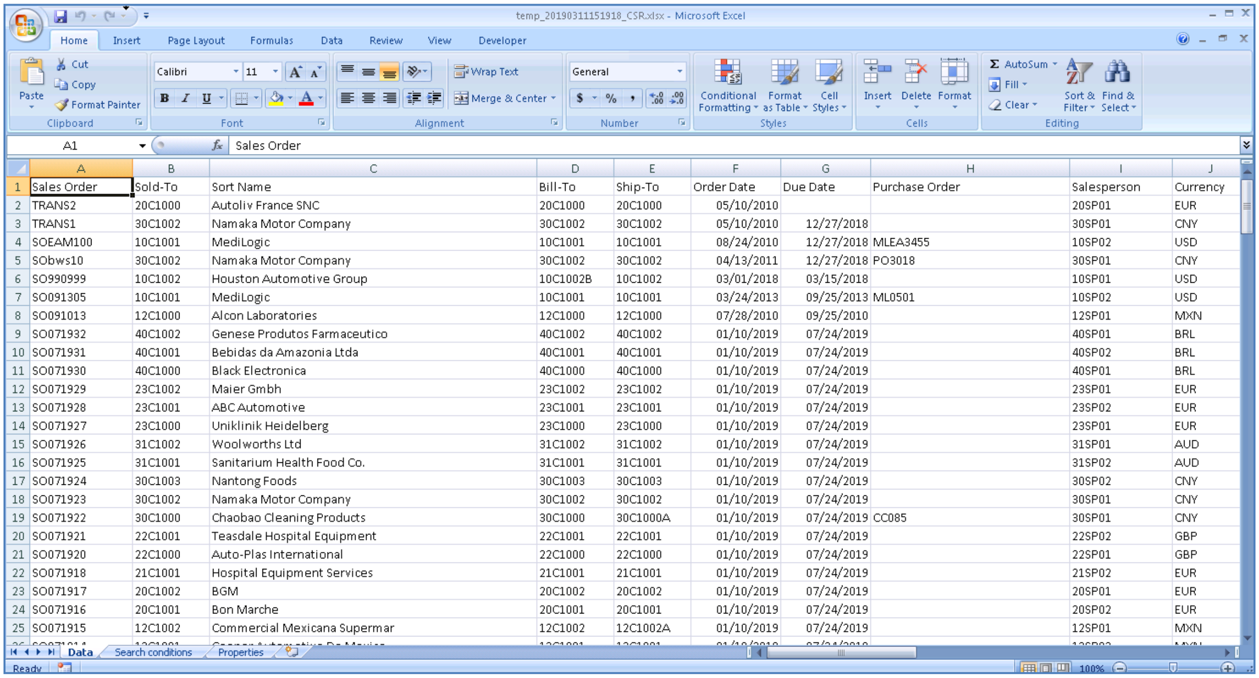
31. Enter File Name <**temp**>



32. Click **Export**

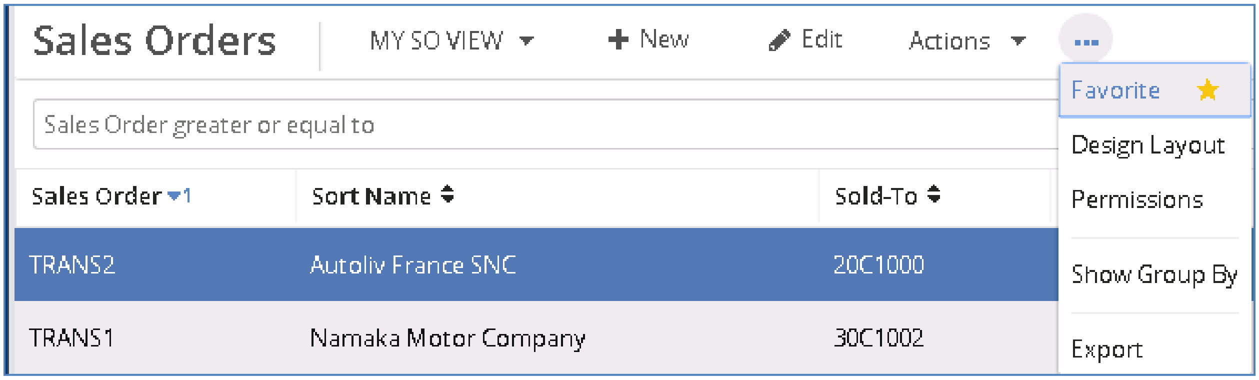


33. Open Excel file

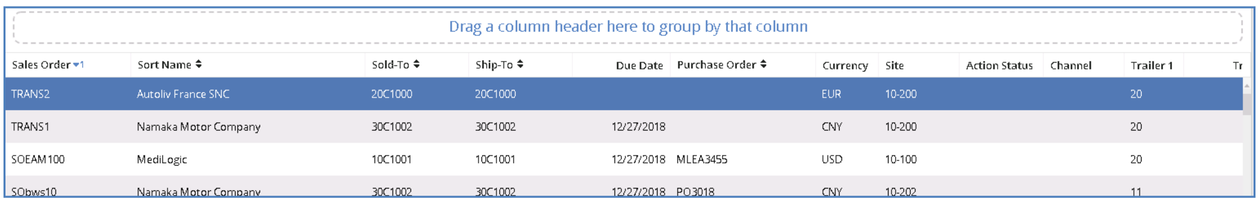


	A	B	C	D	E	F	G	H	I	J
1	Sales Order	Sold-To	Sort Name	Bill-To	Ship-To	Order Date	Due Date	Purchase Order	Salesperson	Currency
2	TRANS2	20C1000	Autoliv France SNC	20C1000	20C1000	05/10/2010			20SP01	EUR
3	TRANS1	30C1002	Namaka Motor Company	30C1002	30C1002	05/10/2010	12/27/2018		30SP01	CNY
4	SOEAM100	10C1001	MediLogic	10C1001	10C1001	08/24/2010	12/27/2018	MLEA3455	10SP02	USD
5	SObws10	30C1002	Namaka Motor Company	30C1002	30C1002	04/13/2011	12/27/2018	PO3018	30SP01	CNY
6	SO990999	10C1002	Houston Automotive Group	10C1002B	10C1002	03/01/2018	03/15/2018		10SP01	USD
7	SO091305	10C1001	MediLogic	10C1001	10C1001	03/24/2013	09/25/2013	ML0501	10SP02	USD
8	SO091013	12C1000	Alcon Laboratories	12C1000	12C1000	07/28/2010	09/25/2010		12SP01	MXN
9	SO071932	40C1002	Genese Produtos Farmaceutico	40C1002	40C1002	01/10/2019	07/24/2019		40SP01	BRL
10	SO071931	40C1001	Bebidas da Amazonia Ltda	40C1001	40C1001	01/10/2019	07/24/2019		40SP02	BRL
11	SO071930	40C1000	Black Electronica	40C1000	40C1000	01/10/2019	07/24/2019		40SP01	BRL
12	SO071929	23C1002	Maier Gmbh	23C1002	23C1002	01/10/2019	07/24/2019		23SP01	EUR
13	SO071928	23C1001	ABC Automotive	23C1001	23C1001	01/10/2019	07/24/2019		23SP02	EUR
14	SO071927	23C1000	Uniklinik Heidelberg	23C1000	23C1000	01/10/2019	07/24/2019		23SP01	EUR
15	SO071926	31C1002	Woolworths Ltd	31C1002	31C1002	01/10/2019	07/24/2019		31SP01	AUD
16	SO071925	31C1001	Sanitarium Health Food Co.	31C1001	31C1001	01/10/2019	07/24/2019		31SP02	AUD
17	SO071924	30C1003	Nantong Foods	30C1003	30C1003	01/10/2019	07/24/2019		30SP02	CNY
18	SO071923	30C1002	Namaka Motor Company	30C1002	30C1002	01/10/2019	07/24/2019		30SP01	CNY
19	SO071922	30C1000	Chaobao Cleaning Products	30C1000	30C1000A	01/10/2019	07/24/2019	CC085	30SP01	CNY
20	SO071921	22C1001	Teasdale Hospital Equipment	22C1001	22C1001	01/10/2019	07/24/2019		22SP02	GBP
21	SO071920	22C1000	Auto-Plas International	22C1000	22C1000	01/10/2019	07/24/2019		22SP01	GBP
22	SO071918	21C1001	Hospital Equipment Services	21C1001	21C1001	01/10/2019	07/24/2019		21SP02	EUR
23	SO071917	20C1002	BGM	20C1002	20C1002	01/10/2019	07/24/2019		20SP01	EUR
24	SO071916	20C1001	Bon Marche	20C1001	20C1001	01/10/2019	07/24/2019		20SP02	EUR
25	SO071915	12C1002	Commercial Mexicana Supermar	12C1002	12C1002A	01/10/2019	07/24/2019		12SP01	MXN

34. Click More icon

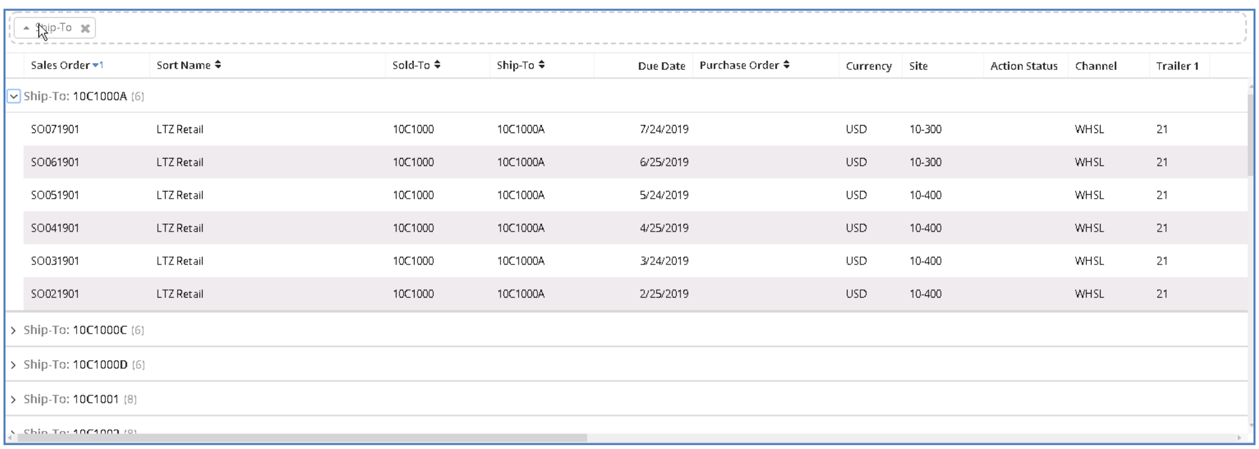


35. Select **Show Group By**

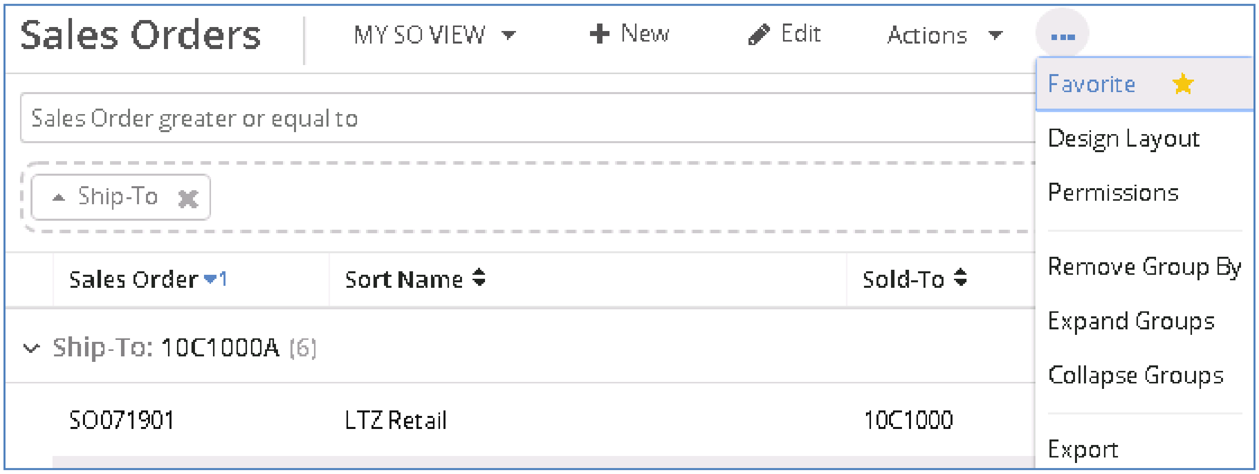


36. Drag and drop Ship-To to Group By box

37. Expand first Ship-To



38. Click More ··· icon



39. (Optionally) Select **Expand Groups/Collapse Groups**

Key Points

- Search and stored searches
- Contextual search
- Sort, re-sequence, resize and remove columns
- Export
- Group by

Personalization

When you edit or add a new item, you a presented with a form to fill in. You can still see the view grid on the left and there is a tools panel on the right. You can collapse either or both if you need more screen real estate.

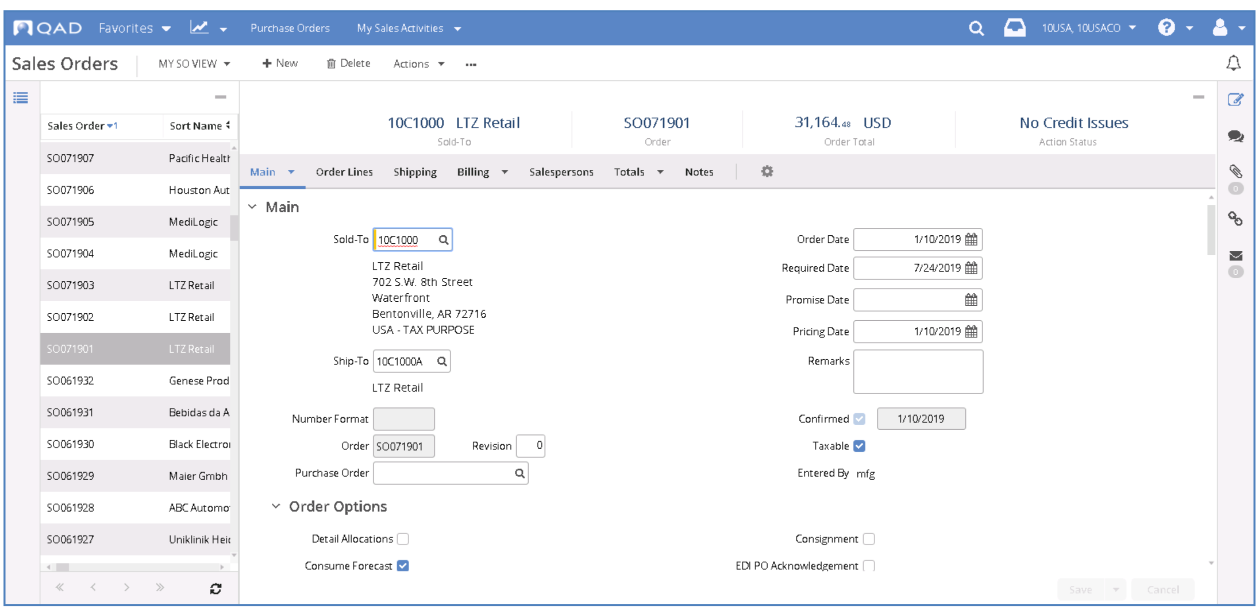
The middle section is the Form with data fields organized on to separate panels – Main, Order Lines, Billing, Shipping, etc.

You can personalize this to include just the panels and fields you need, adapting the screens to meet your business process. For example, if you are an order entry clerk you may need to specify far more information than someone entering spare parts orders.

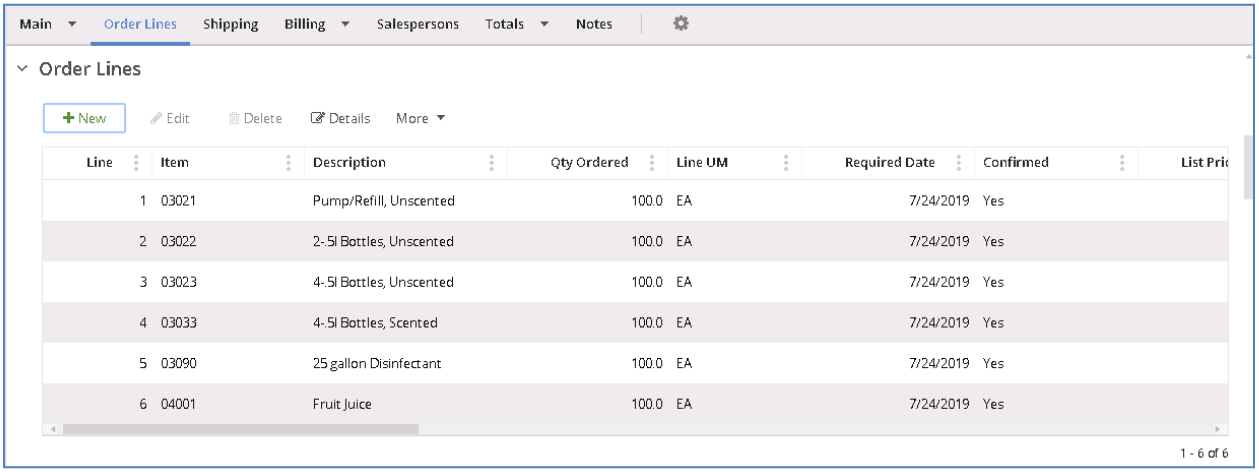
Each user can personalize their screens, or an administrator can set up personalized screens for specific users and roles, or system-wide. This allows companies and users to easily adapt the system to their business processes and user preferences without any intrusive customization.

Demo

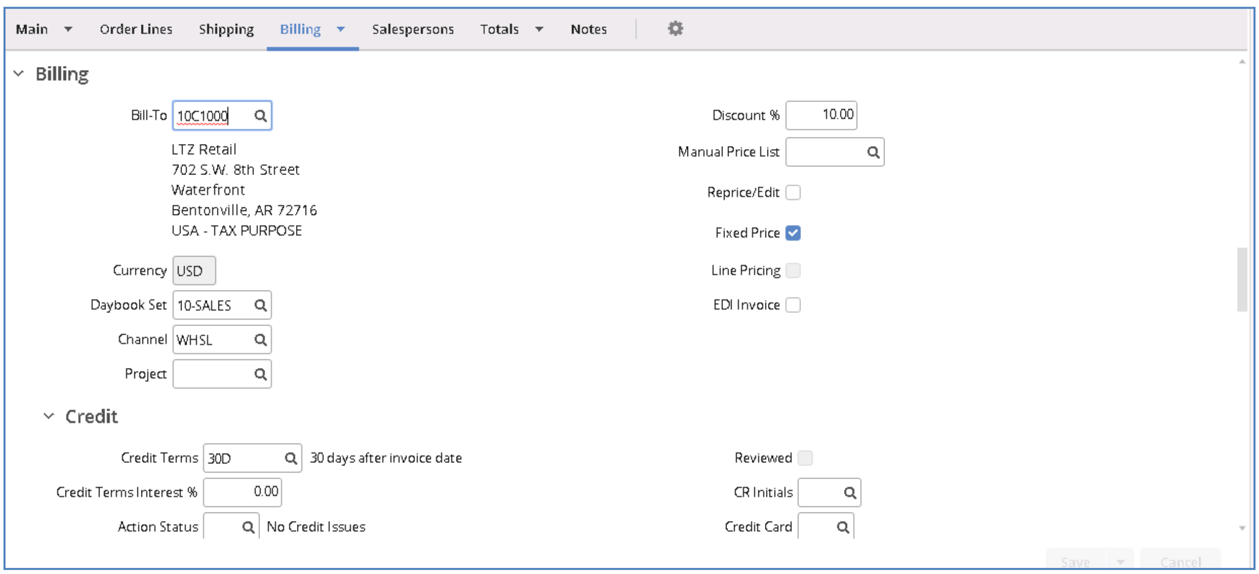
1. Highlight any Sales Order
2. Click Edit



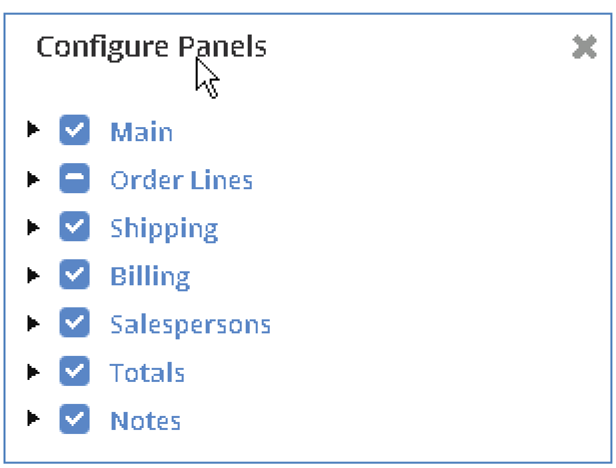
3. Click **Order Lines** panel



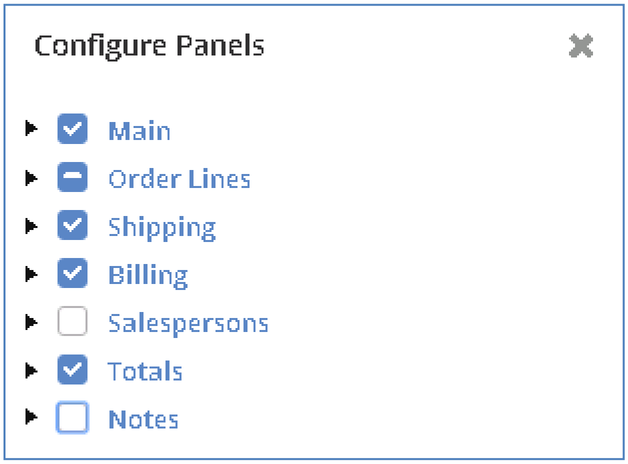
4. Click **Billing** panel



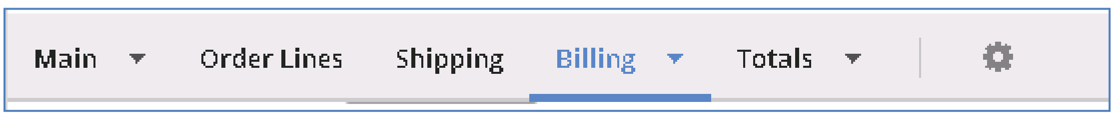
5. Click Settings icon



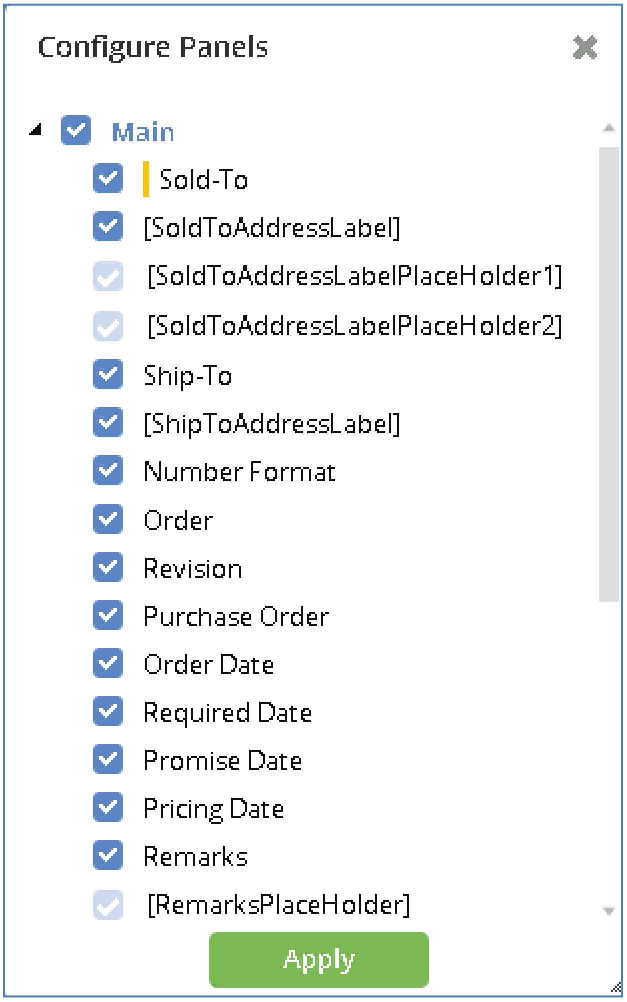
6. Uncheck **Salespersons, Notes**



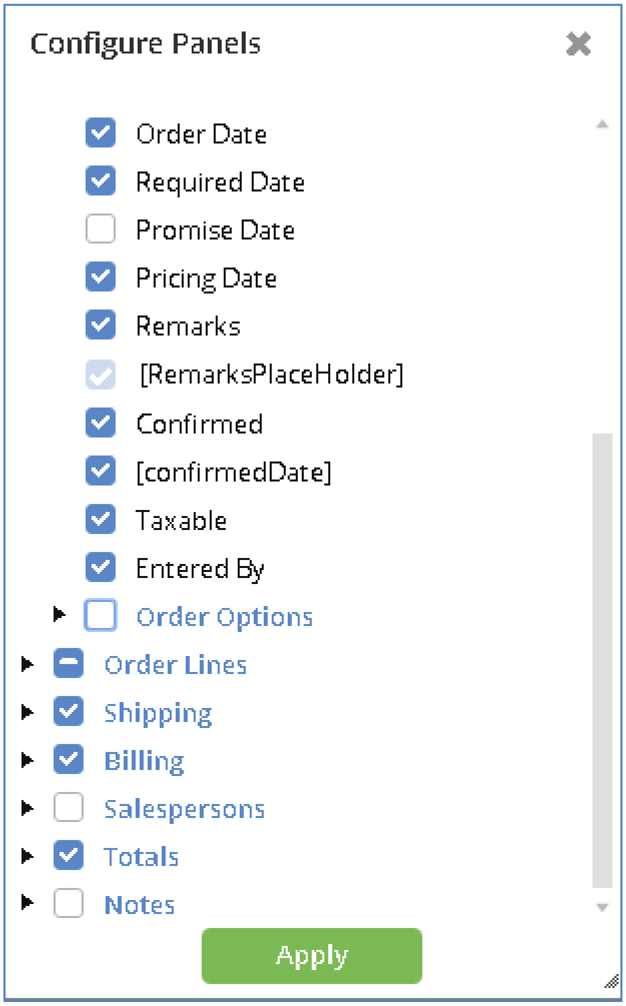
7. Click **Apply**



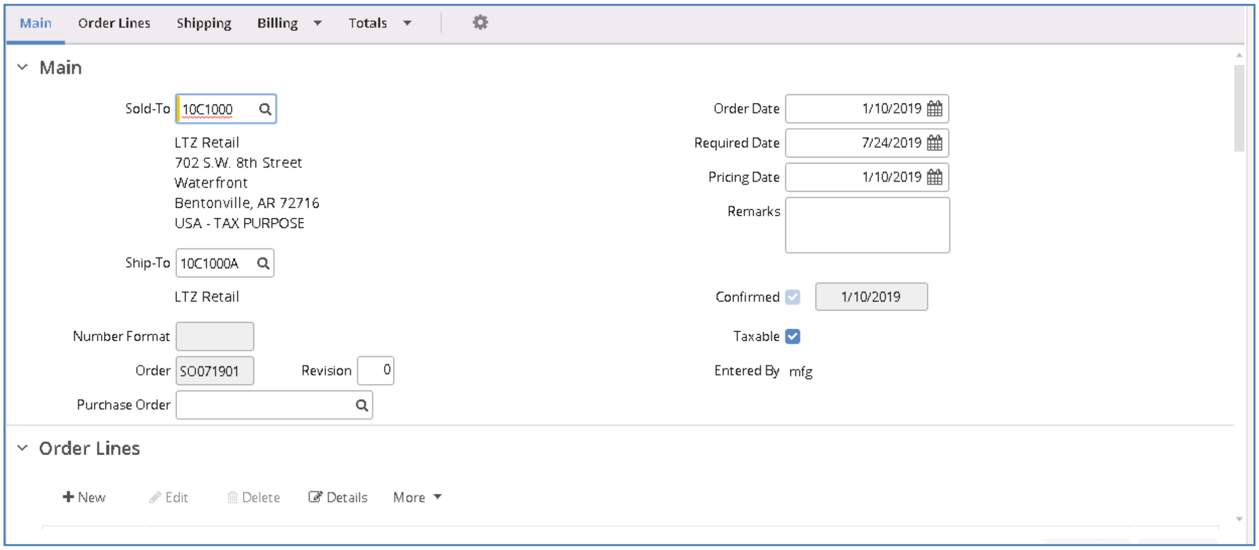
8. Click Settings icon
9. Expand **Main**



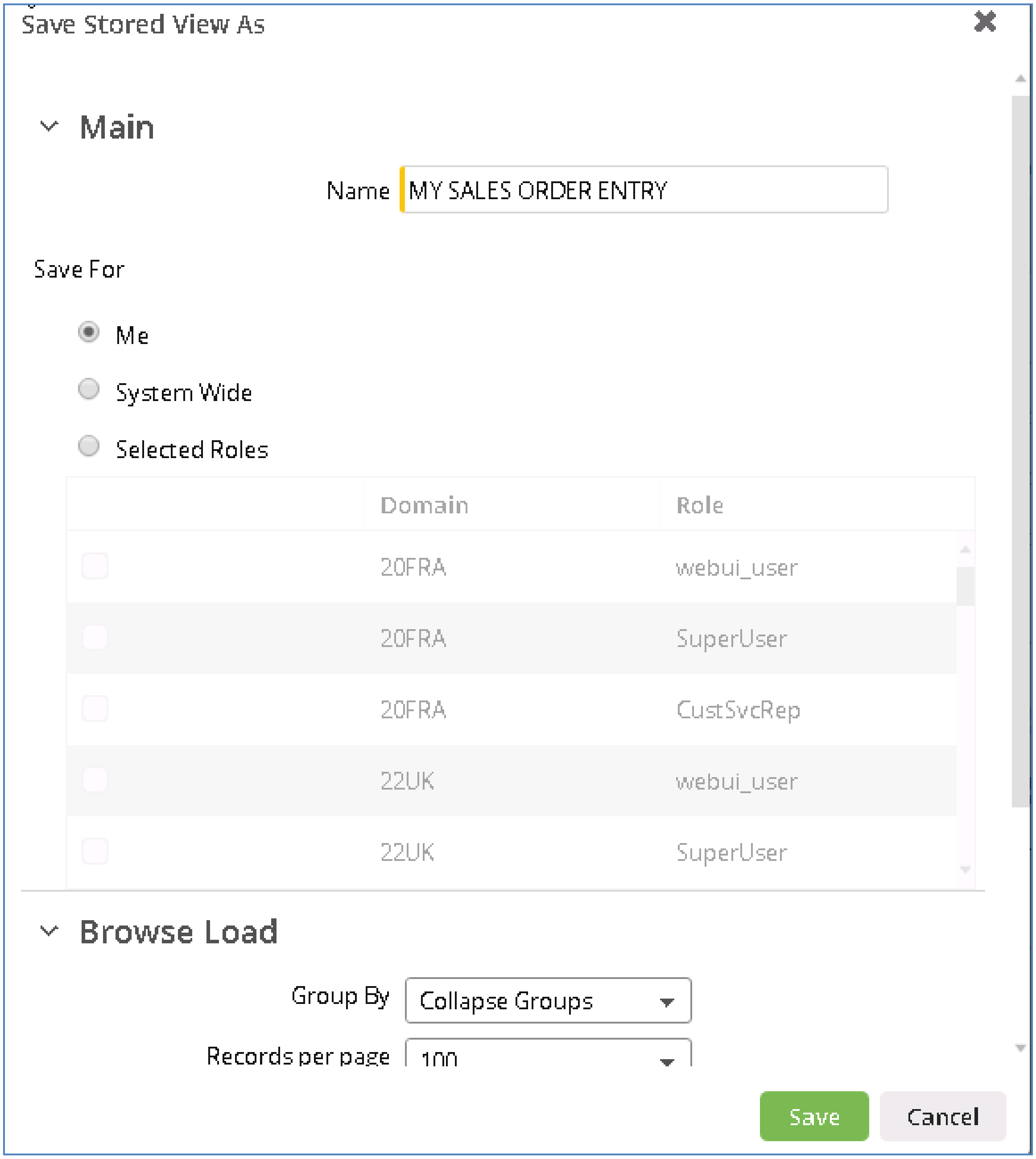
10. Uncheck **Promise Date**
11. Uncheck **Order Options**



12. Click **Apply**
13. Select **Main** panel



14. In **MY SO VIEW**, click drop-down
15. Click **Save As**
16. Enter **MY SALES ORDER ENTRY**, **Save for Me**

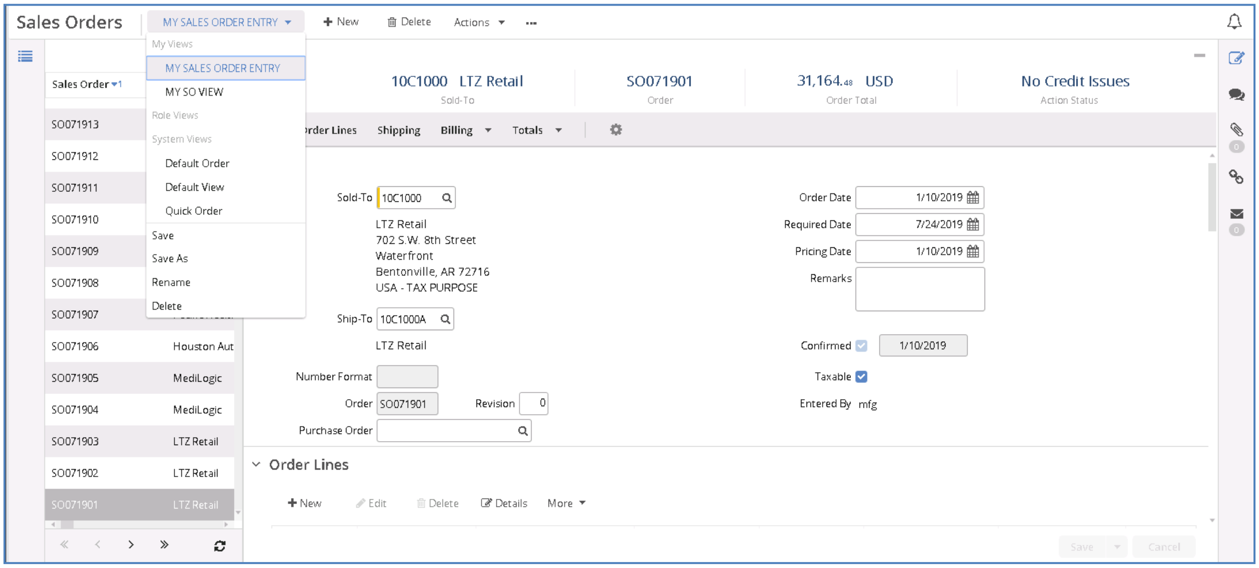


17. Click **Save**

Note the view is now MY SALES ORDER ENTRY

18. Click **MY SALES ORDER ENTRY** drop-down

You can toggle between views



Key Points

- View Grid, Form, Tools
- Multi-panel form
- Add/remove panels, fields
- Save for reuse

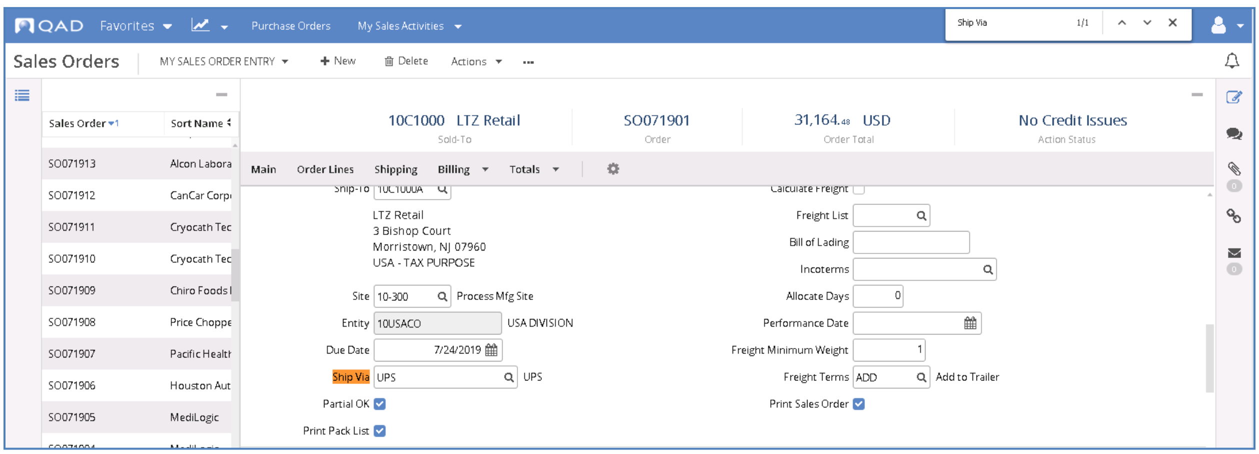
Fast Data Entry

When using forms, you don't have to know what panel a certain field is on. Just use the context sensitive search and enter what you are looking for.

Another option is to simplify the forms, removing all unnecessary information, for example, making entering a new sales order as simple as typing in 3 fields – customer, item and quantity.

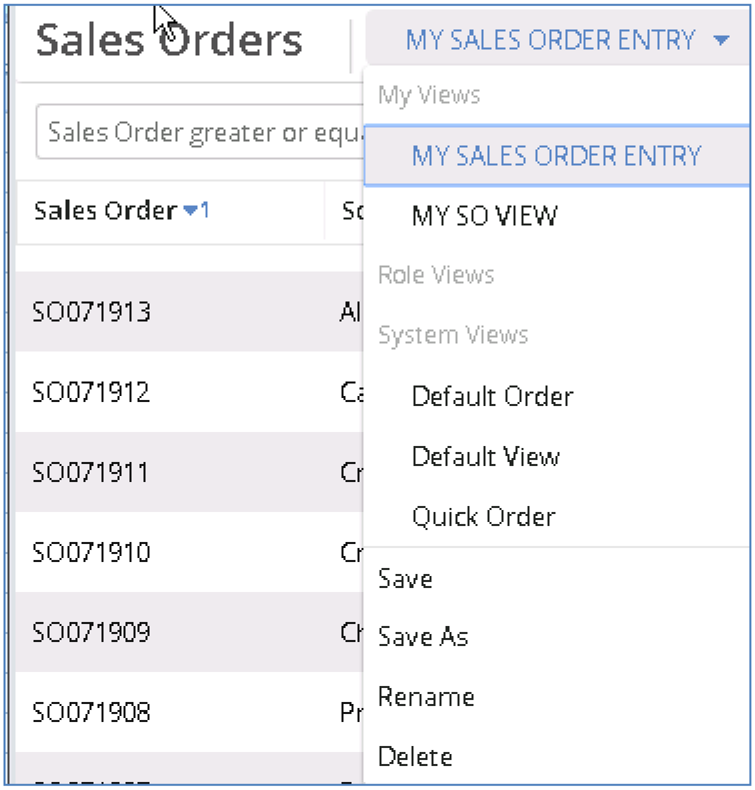
Demo

1. Click **CTRL + F**
2. Enter **Ship Via**

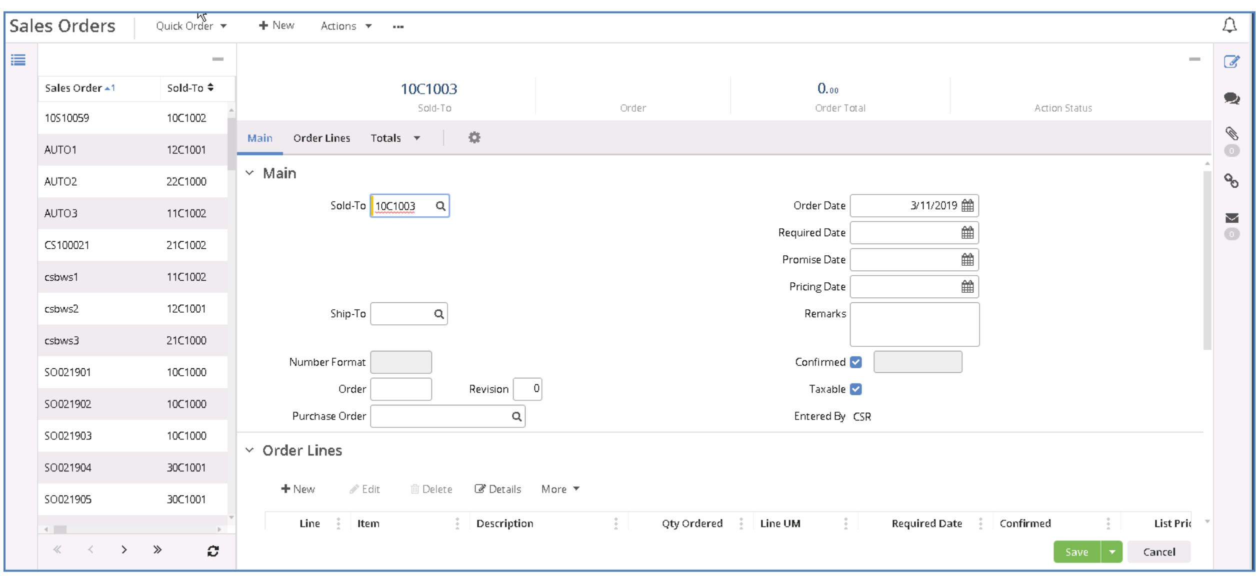


3. Close search
4. Close form
5. In **MY SALES ORDER ENTRY**, click drop-down

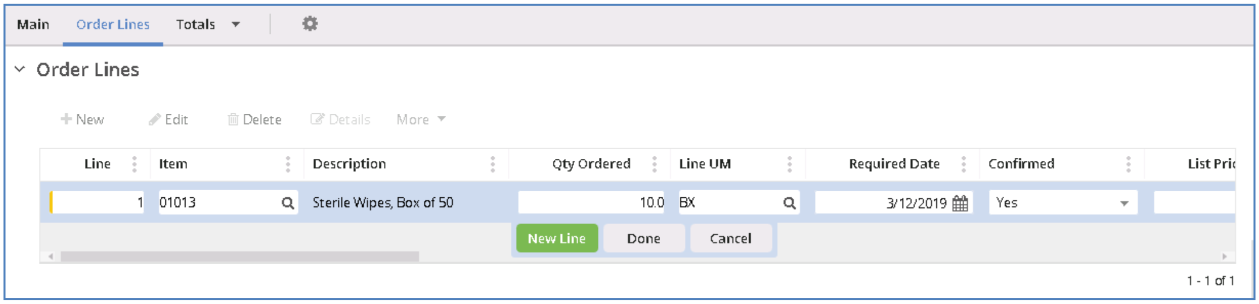
Note My Views, Role Views and System Views



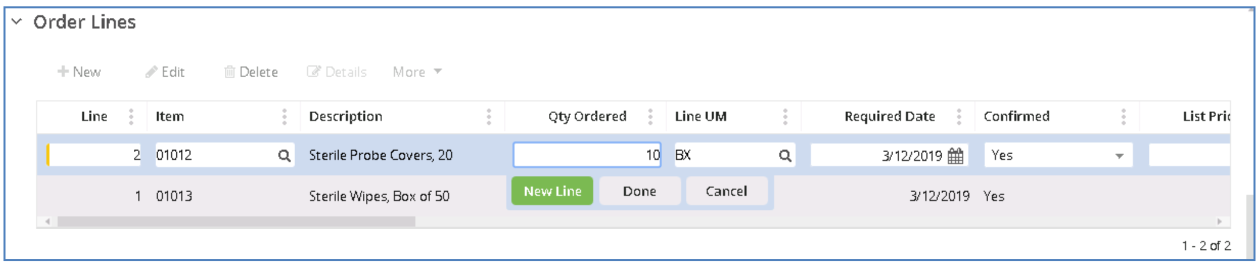
6. Select **Quick Order**
7. Click **+New**
8. In Main, enter Sold-To **10C1003**



9. In Order Lines, Click **+New**
10. Enter Item **01013**, Qty **10**, Discount **55**%



11. Click **New Line**
12. Enter Line 2, Item **01012**, Qty **10**



13. Click **Done**
14. Click **Save**

Key Points

- Contextual field search
- Simplified forms

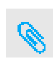
Attachments

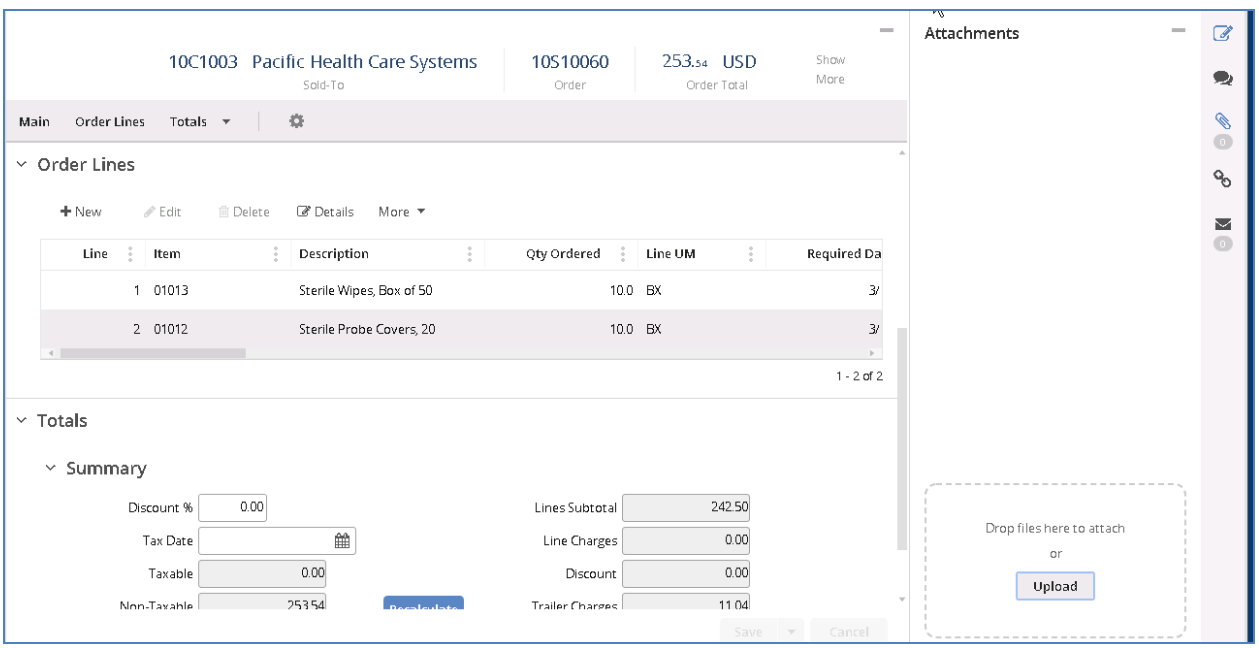
Anywhere in the system you will see that you have the option to attach related documents, and where applicable, set these up so that the follow the item through the subsequent workflow.

For example, you may want to attach the customer Purchase Order to the sales order and have it flow through to the Invoice. In other cases the documents will be only used locally; for example you may attach documents to a Sales Quote that you won't need to refer to once you release a Sales Order.

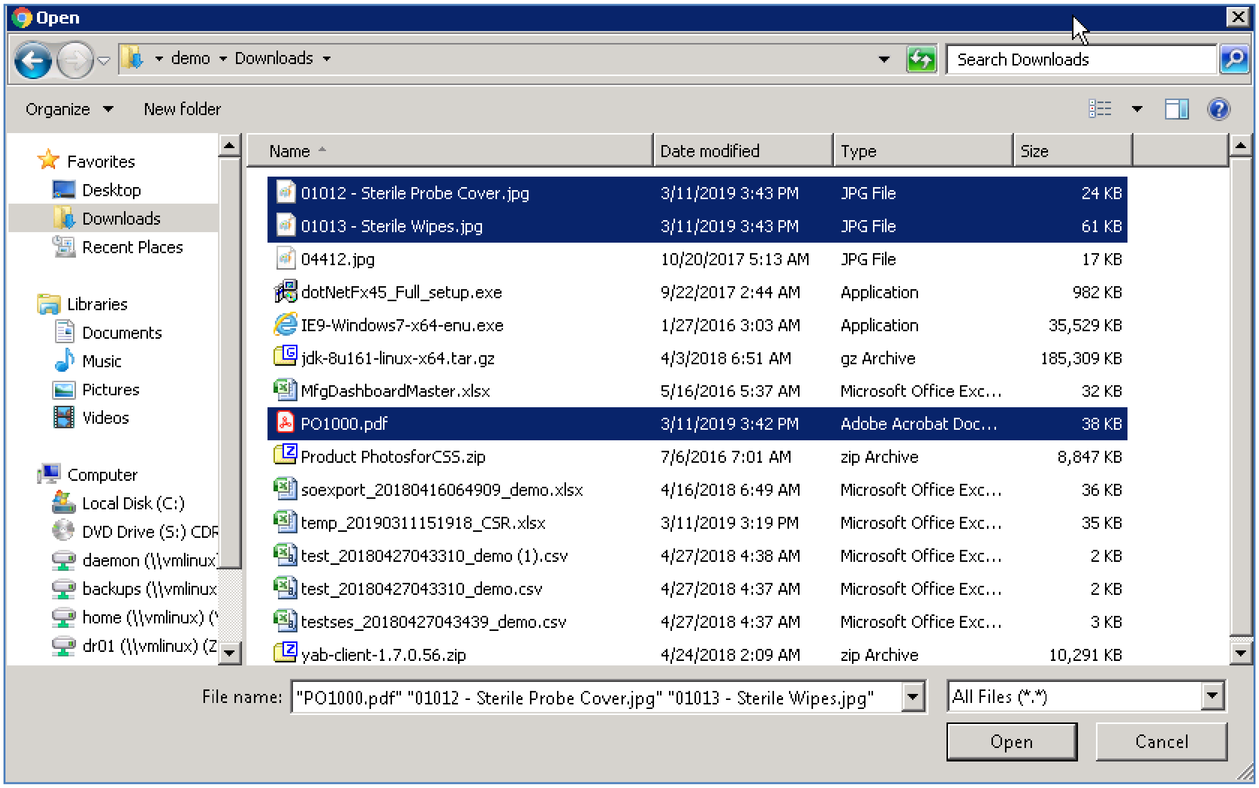
You can attach any type of document – for example, a pdf, jpg, document or spreadsheet – and depending on the type, optionally use it as a "thumbnail" on the screen.

Demo

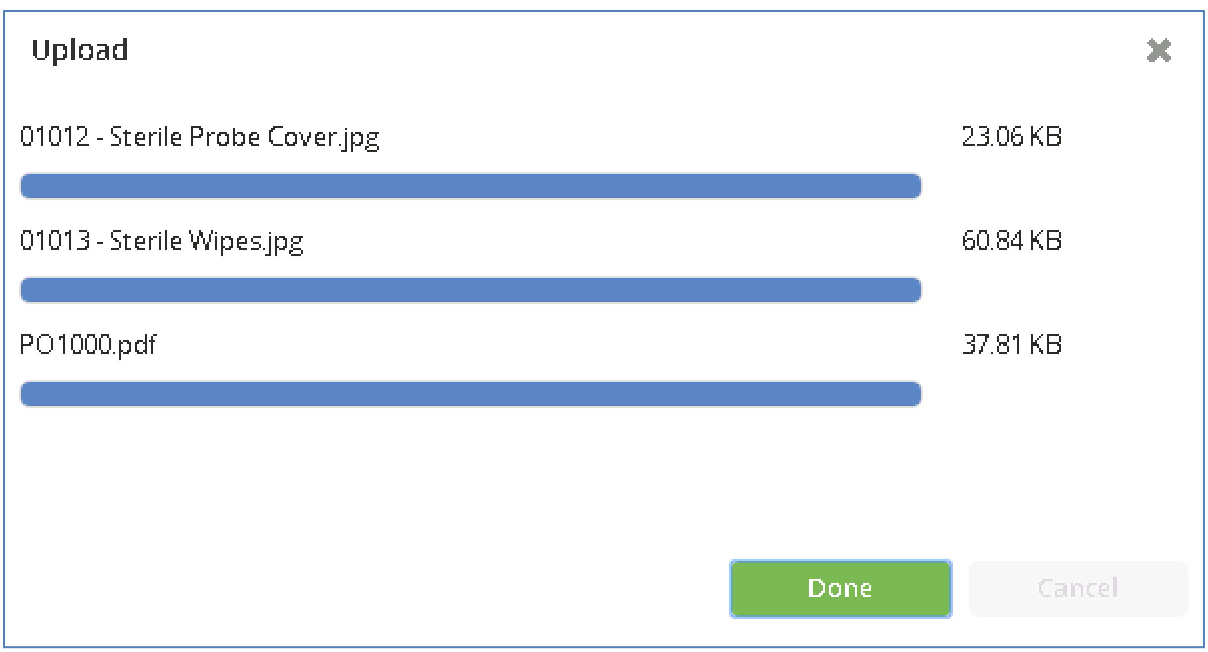
1. In Tools, click Attachments  icon



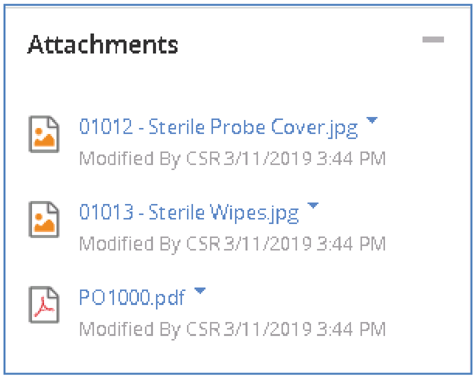
2. Click **Upload**
3. Highlight one or more documents



4. Click **Open**

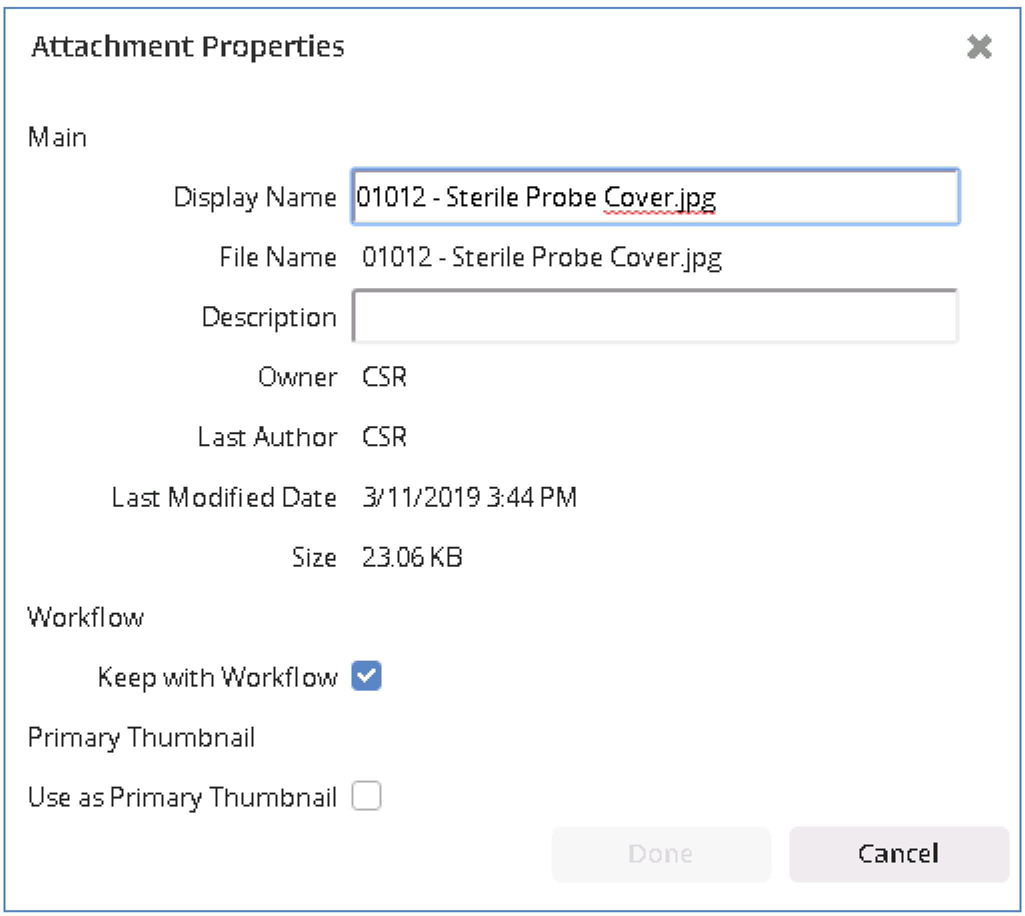


5. Click **Done**



6. In any document, click
7. Select Properties

Note Keep with Workflow option



Key Points

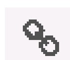
- One or more attachments
- Option to keep with workflow

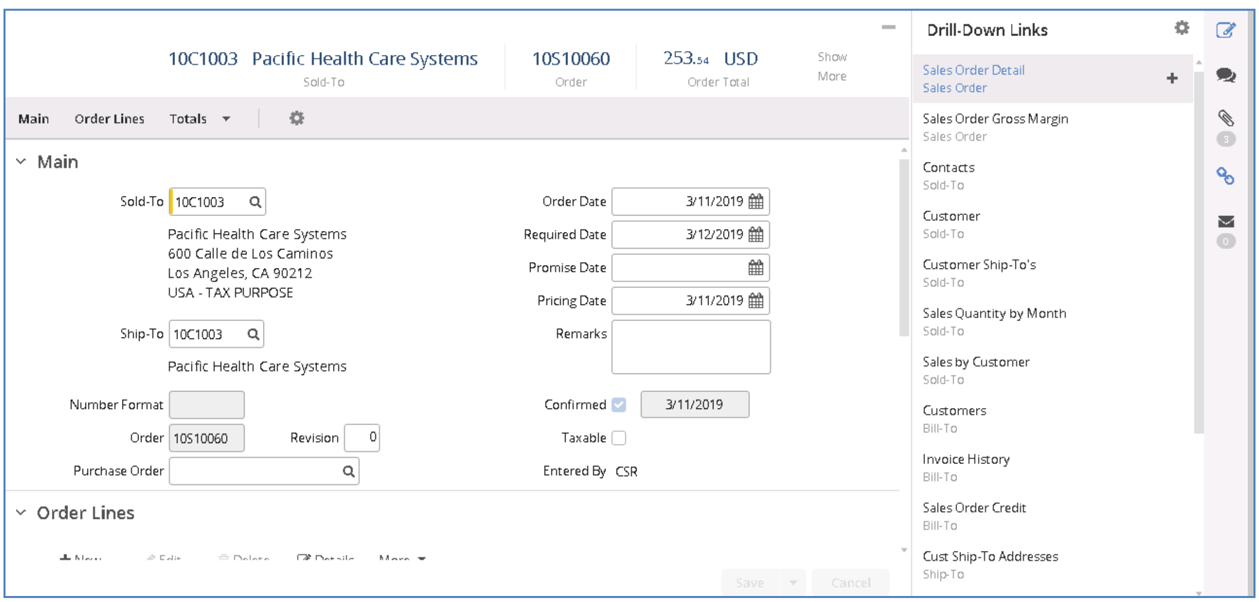
Context-Sensitive Links and Actions

From any function, you can quickly access any related information you may need by simply clicking the link icon. For example, when you are entering a sales order, you may want to look up customer credit or ship-to addresses. You may even want to quickly add new data – for example, adding a ship-to "on the fly" as you enter the order.

In addition to context-sensitive Links, each screen provides context-sensitive Actions that offer single-click access to next logical step in work flow. In the example of Sales Orders, the next logical step would be to Pick / Ship. Some Actions work on just one order; others work for multiple (Bulk) - in this case you can select a group of orders and perform some Action like repricing or checking credit.

Demo

1. In Tools, click Link  icon

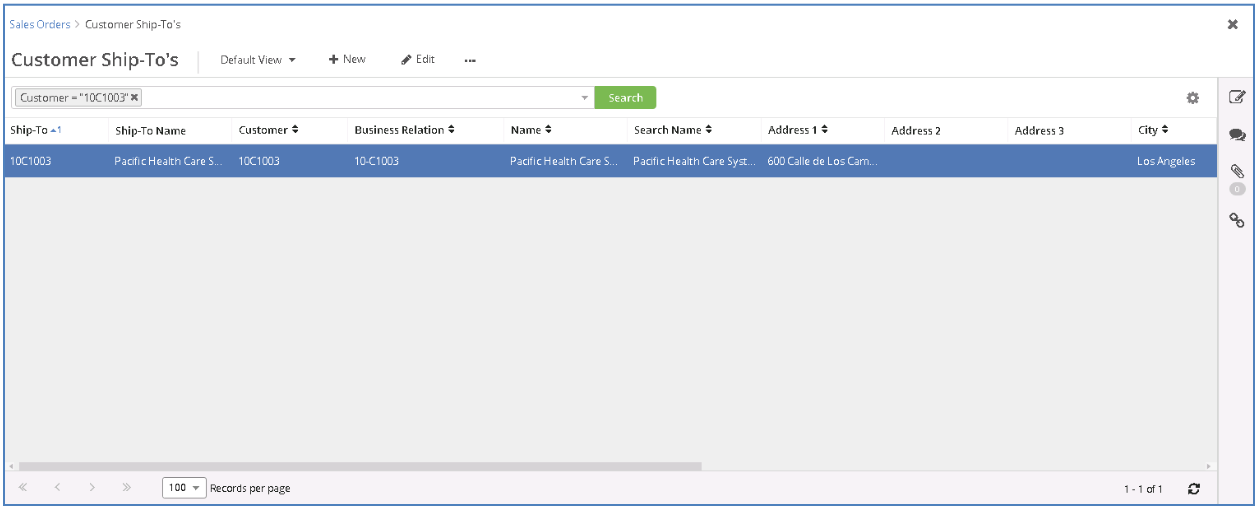


2. Hover over Customer Ship-To's

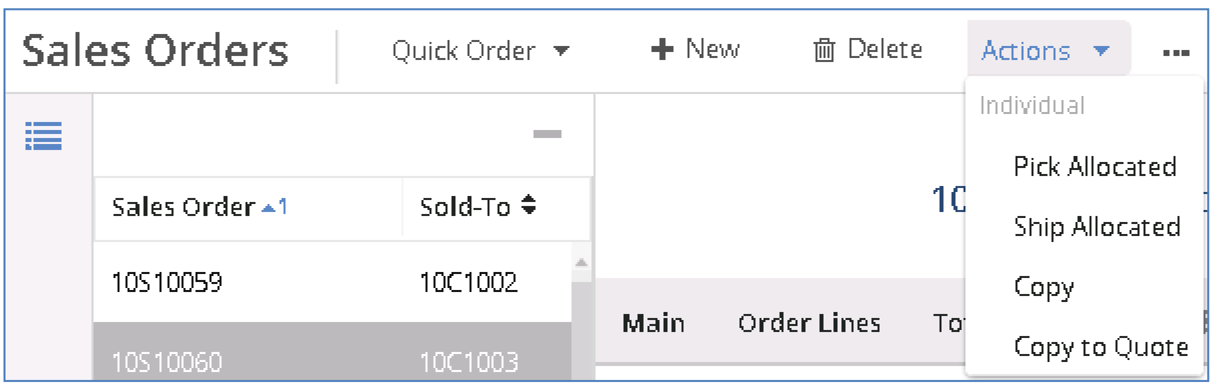
Note + icon to add new ship-to

3. Select **Customer Ship-To's**

Note +New and Edit option



4. Close window
5. Close right panel
6. Click Actions drop-down



Key Points

- Links to related data
- Actions include related activities, next steps in workflow

Streamlined Communication

The Web UI encourages communication with built-in collaboration and notifications, as well as built in Alerts. For example, here the CSR can send a note to the manager for approval of a discount, and you can set up alerts so that even if they forget, the system will automatically generate an alert!

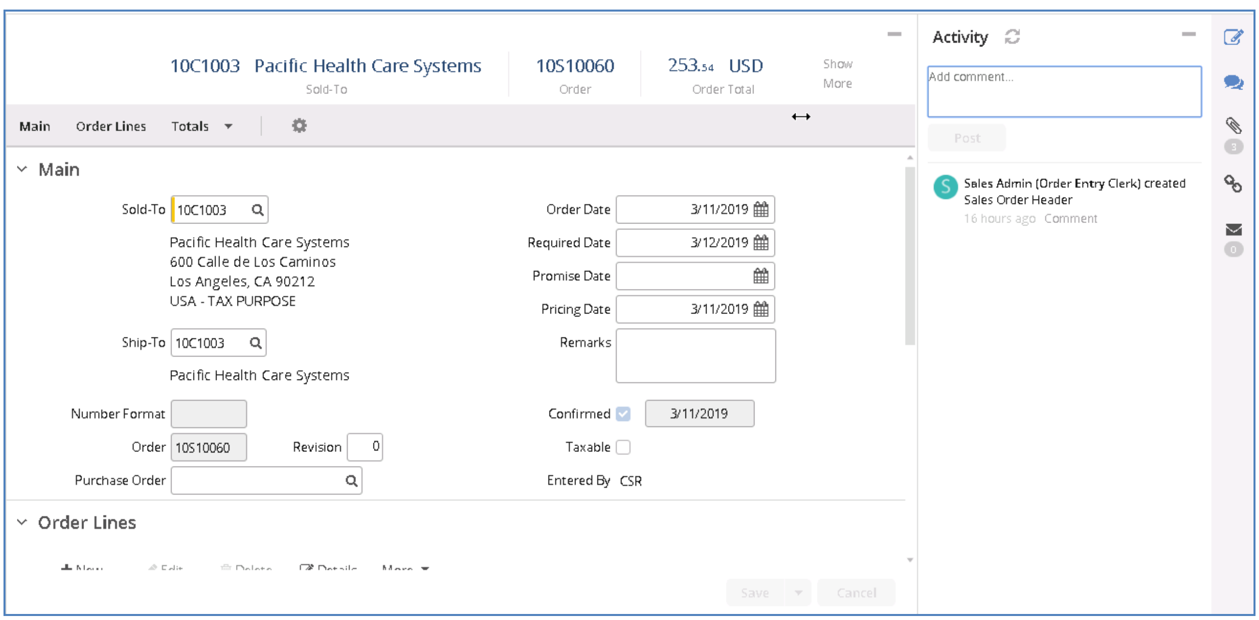
Communication can go back and forth, between any number of users. Each message has a direct link to the original sales order so the user can review the information and, subject to security, make any changes. They may even send a note to someone else.

The system maintains a complete audit trail of Inbox items as well as comments entered in the Activity Feed.

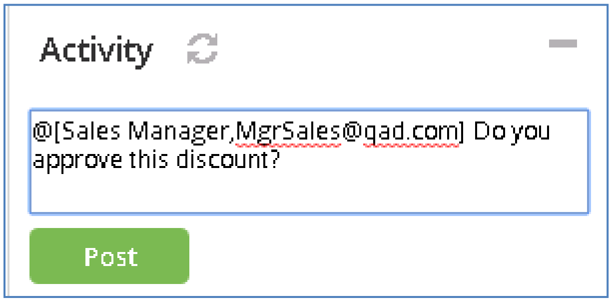
Note also that the Activity Feed keeps track of changes to "tracked" fields – here you see who created the Sales Order and you would see a record of changes.

Demo

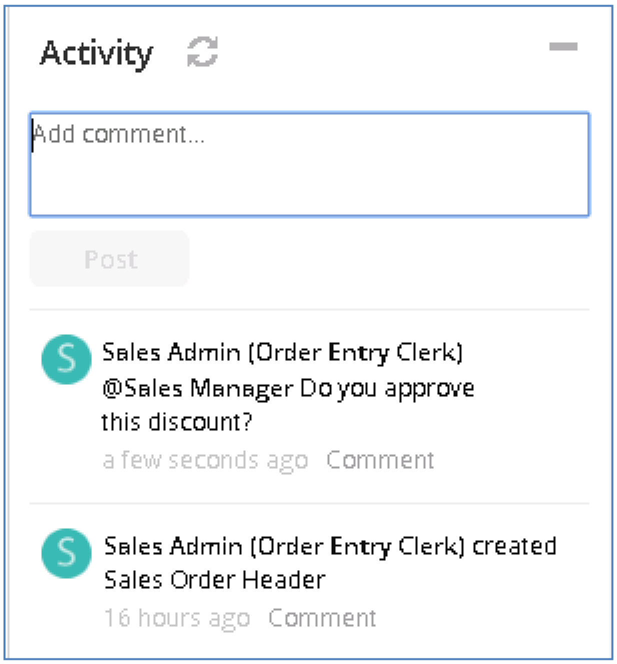
1. In Tools, click Activity Feed icon



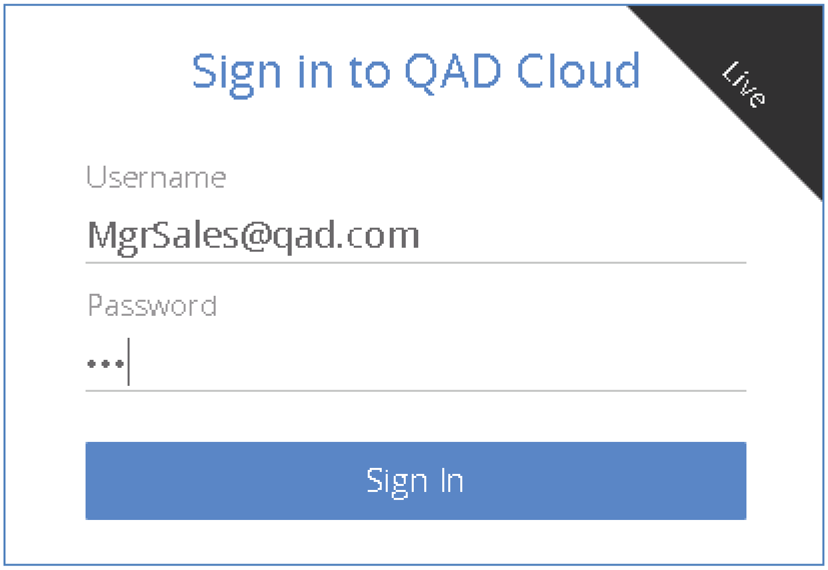
2. Enter **@mgrsales Do you approve this discount?**



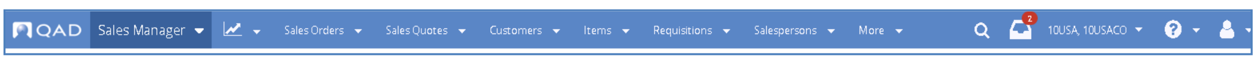
3. Click **Post**



4. Launch another Web UI session
5. Enter Username MgrSales@qad.com, Password **qad**



6. Click **Sign In**

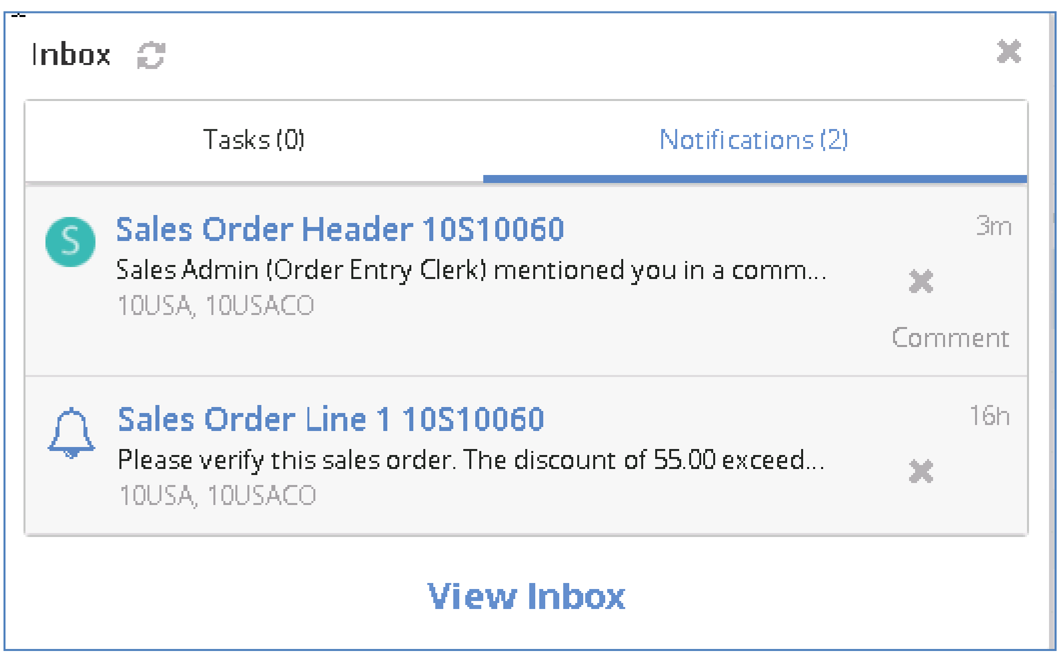


7. Click Inbox  icon

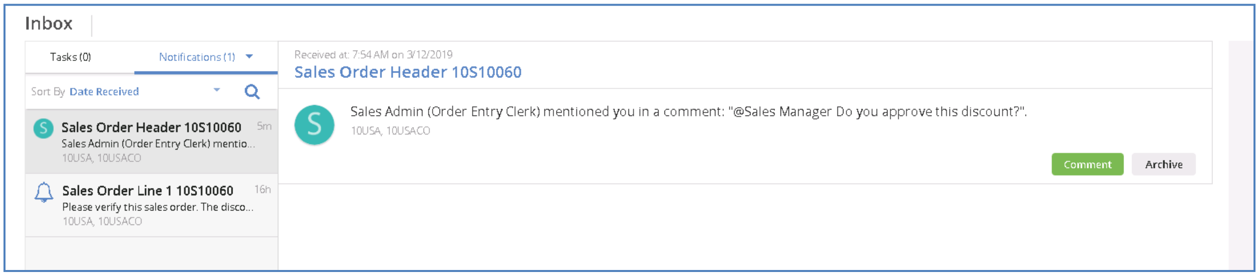
Note the indicator for 2 messages

8. Click **Notifications**

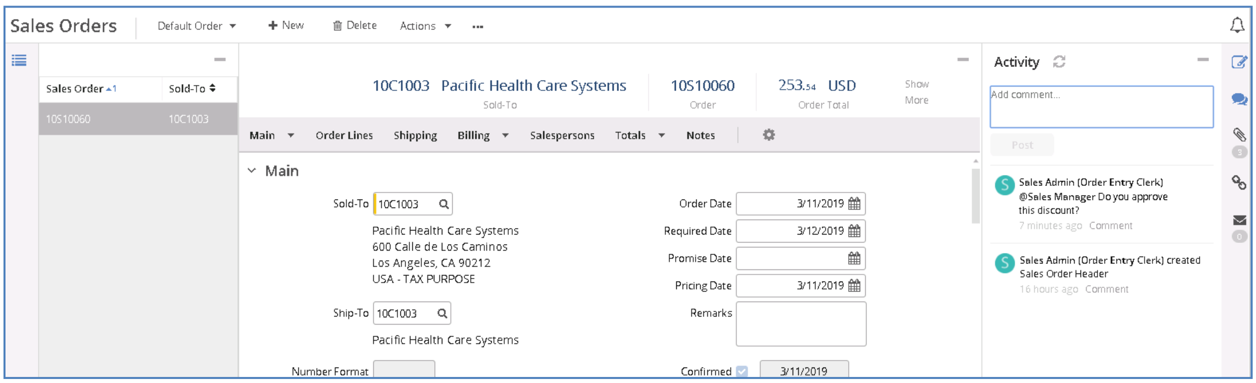
Bell indicates an Alert; the other message is from the Sales Admin (the "S" icon can be their photo)



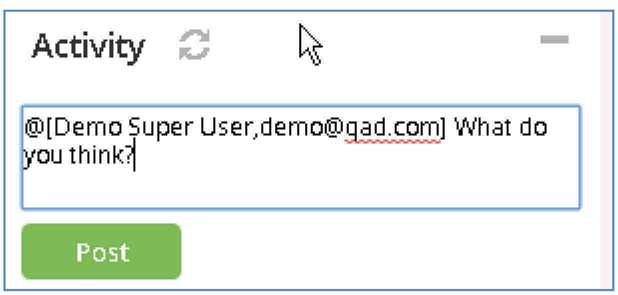
9. Click **View Inbox**



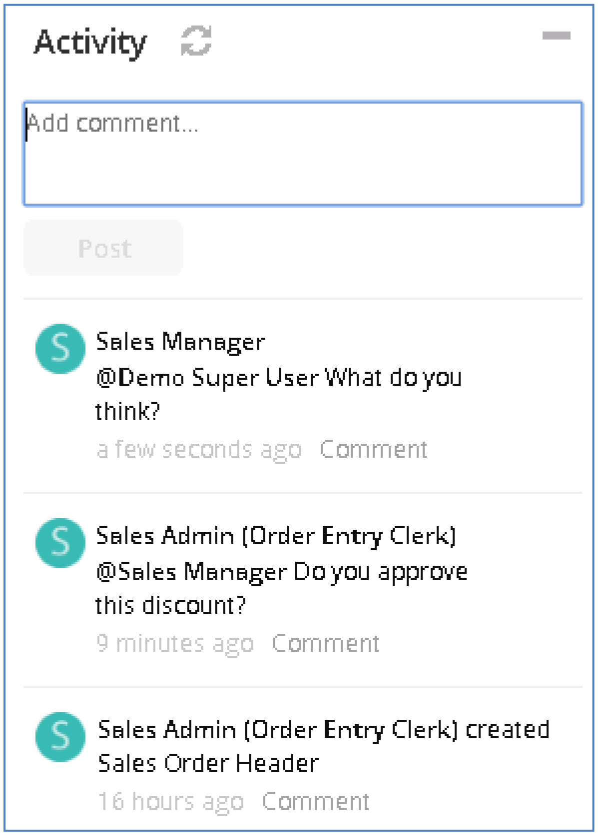
10. Click **Sales Order Header <10S10060>** link



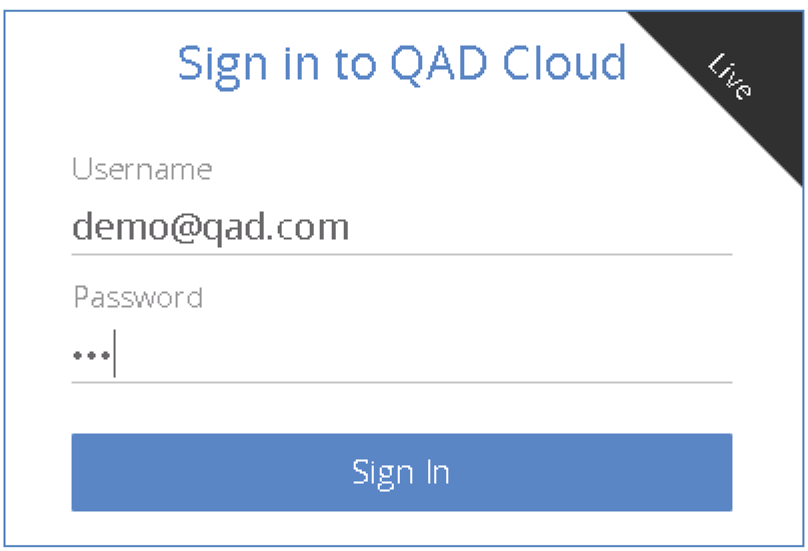
11. In Activity Feed, enter **@demo What do you think?**



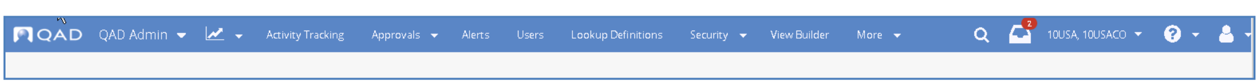
12. Click **Post**



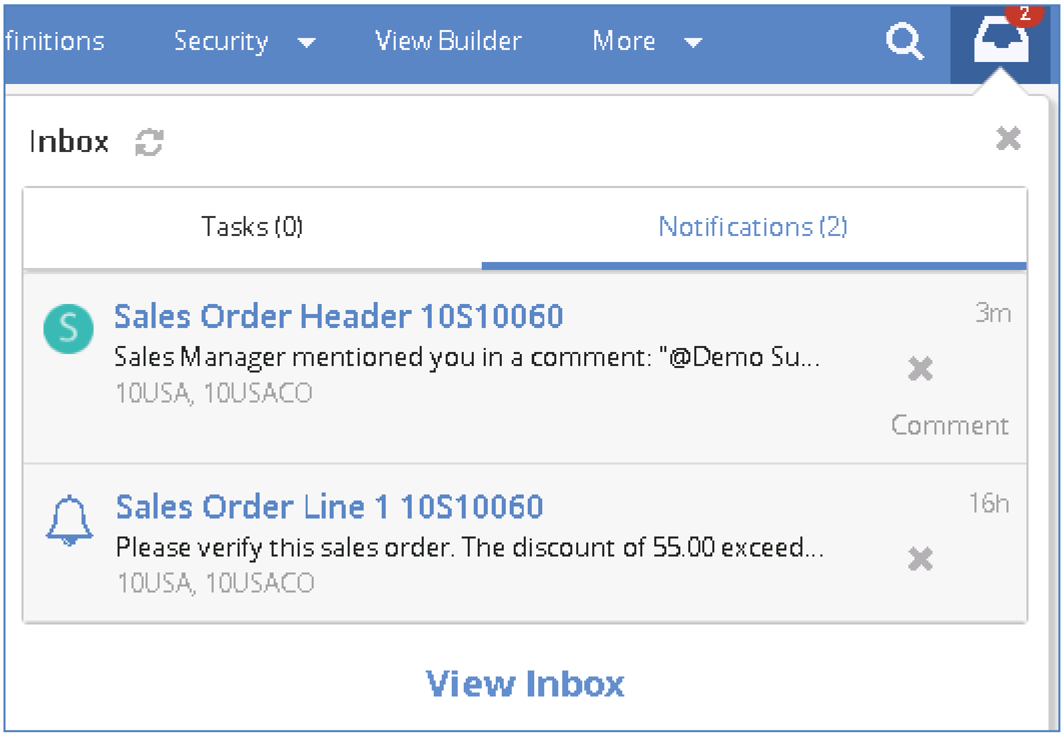
13. Launch another Web UI session
14. Enter Username demo@qad.com, Password **qad**



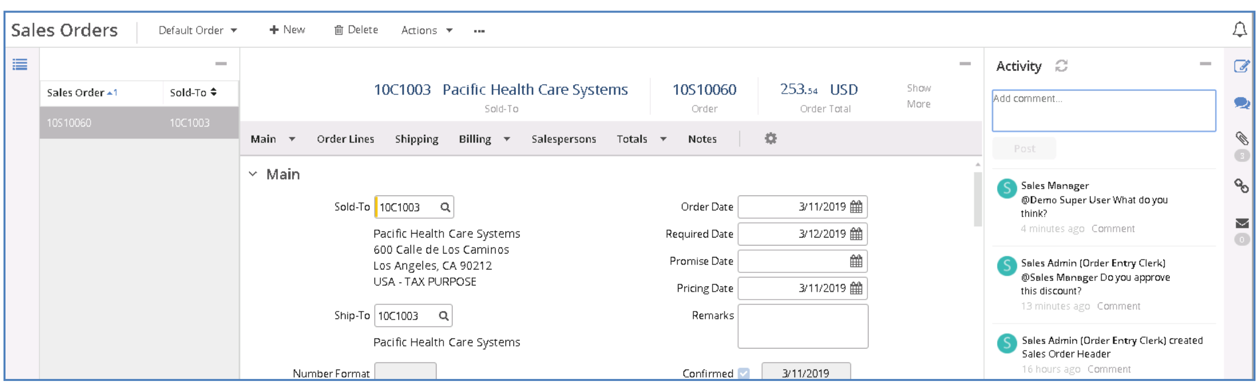
15. Click **Sign In**



16. Click Inbox  icon
17. Click **Notifications**



18. In notifications, click **Sales Order Header <10S10060>**



Key Points

- Notifications
- Alerts

Alerts

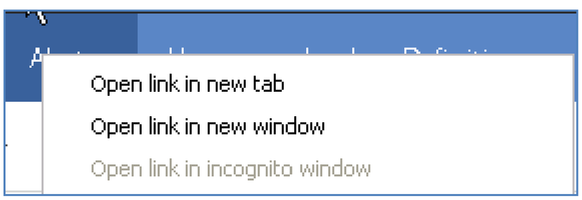
In this example, there was an alert automatically generated when a discount on the sales order was greater than 50%.

This is just one example of an alert. They may be simple, such as if the sales order line discount exceeds a certain percentage, or complex, with multiple conditions like discount > 25% and sale price > $10,000. You can even combine conditions with tracked fields, for example, tracking any change to the price, order policy or yield of an A item. When the conditions are met, you automatically will get an alert in your InBox.

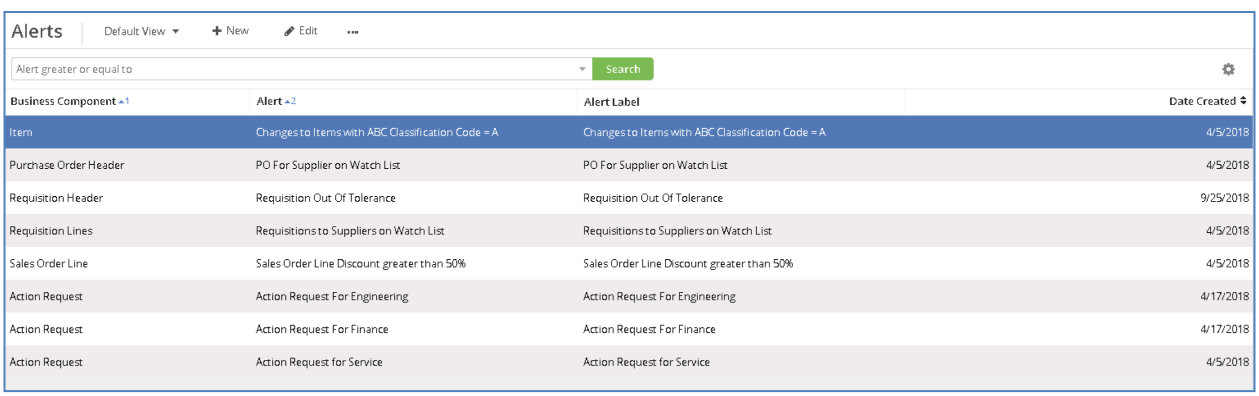
The administrator may add alerts and assign them to you, or if you have security, you can add your own by clicking the Alert in any function.

Demo

1. On menu, **Alerts** , right-click

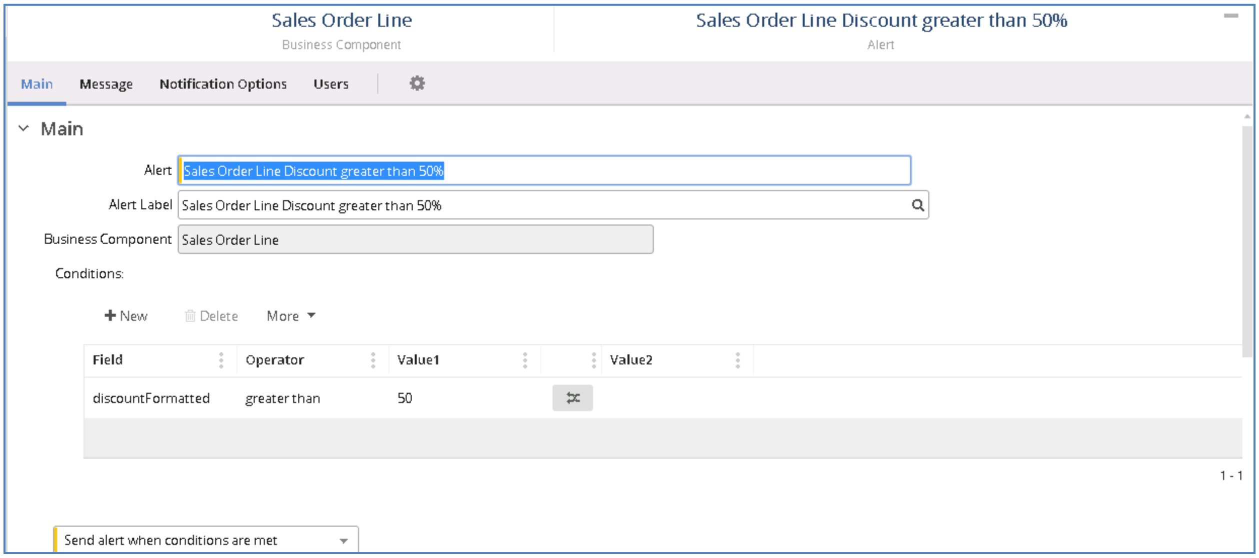


2. Select **Open link in new tab**



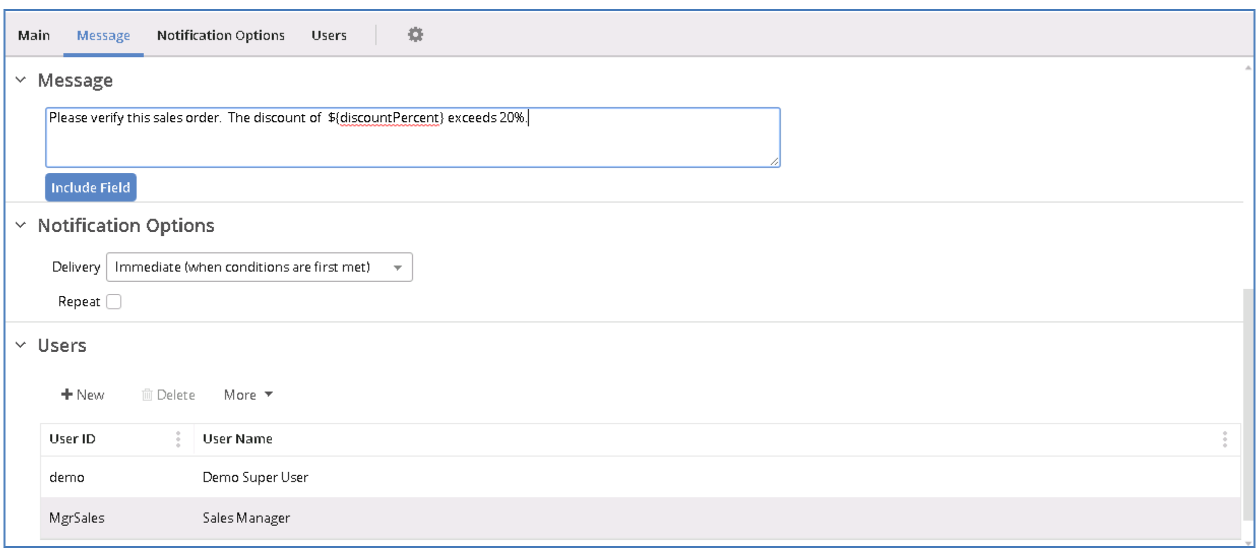
Business Component	Alert	Alert Label	Date Created
Item	Changes to Items with ABC Classification Code = A	Changes to Items with ABC Classification Code = A	4/5/2018
Purchase Order Header	PO For Supplier on Watch List	PO For Supplier on Watch List	4/5/2018
Requisition Header	Requisition Out Of Tolerance	Requisition Out Of Tolerance	9/25/2018
Requisition Lines	Requisitions to Suppliers on Watch List	Requisitions to Suppliers on Watch List	4/5/2018
Sales Order Line	Sales Order Line Discount greater than 50%	Sales Order Line Discount greater than 50%	4/5/2018
Action Request	Action Request For Engineering	Action Request For Engineering	4/17/2018
Action Request	Action Request For Finance	Action Request For Finance	4/17/2018
Action Request	Action Request for Service	Action Request for Service	4/5/2018

3. Double-click **Sales Order Line Discount** Alert



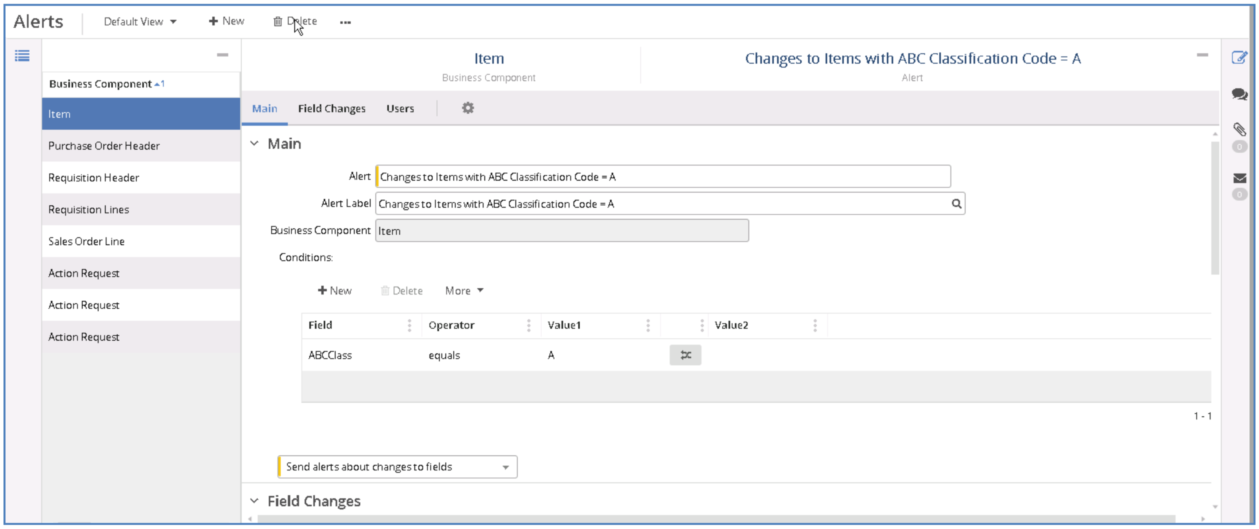
4. Click **Message** panel

Note that both the MgrSales and user demo receive this alert



5. In left browse panel, highlight **Item**

Note ABC Class equals A and alert is sent when there are changes to tracked fields



Key Points

- Administrator or User-Defined Alerts
- Complex conditions
- Changes to tracked fields

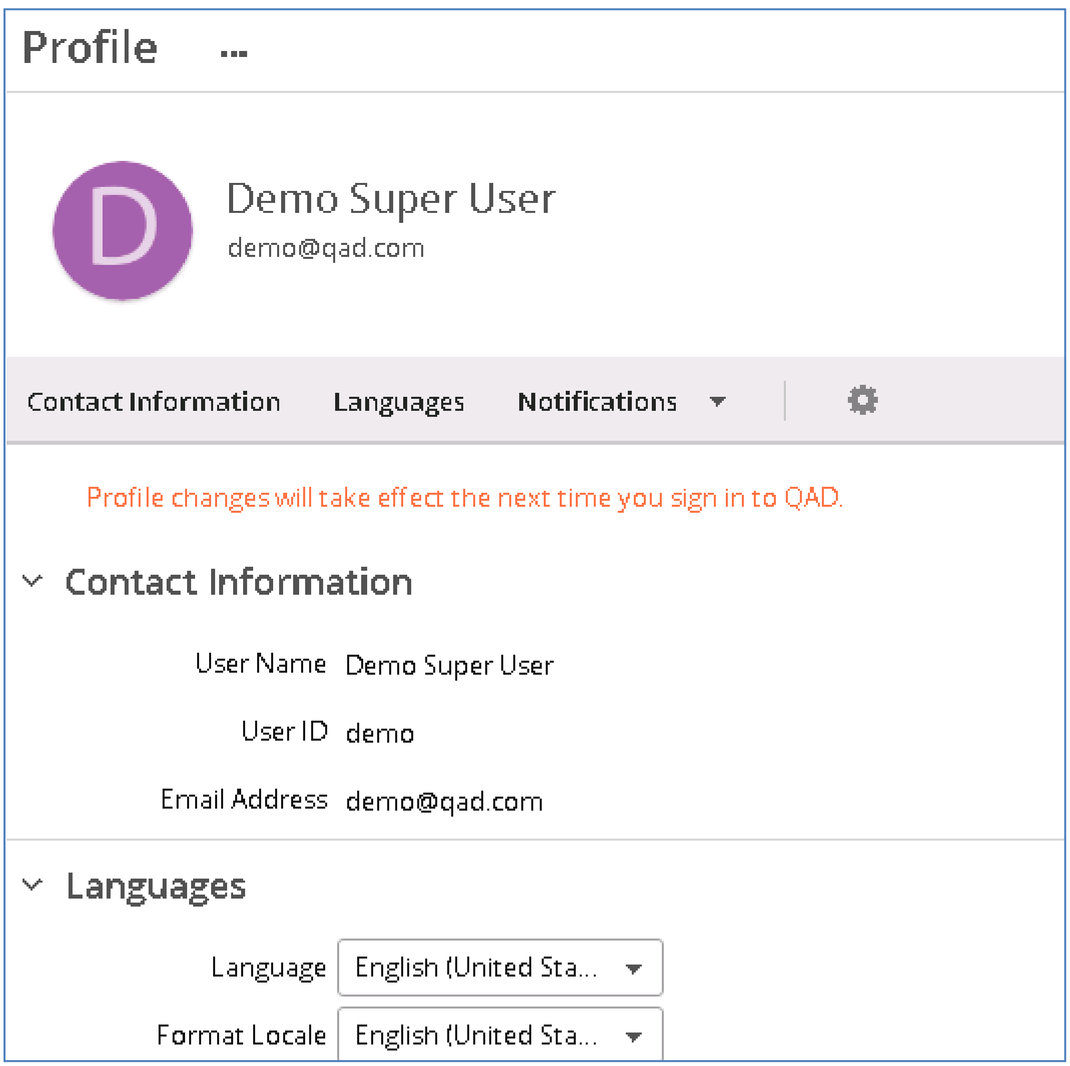
User Profile

In your user profile, you can specify your User Notification preferences. If you choose to receive notifications, you can set different preferences for each category: activity feeds, alerts, approvals and reports, and within that, you can set different preferences for each type of notification event within a category.

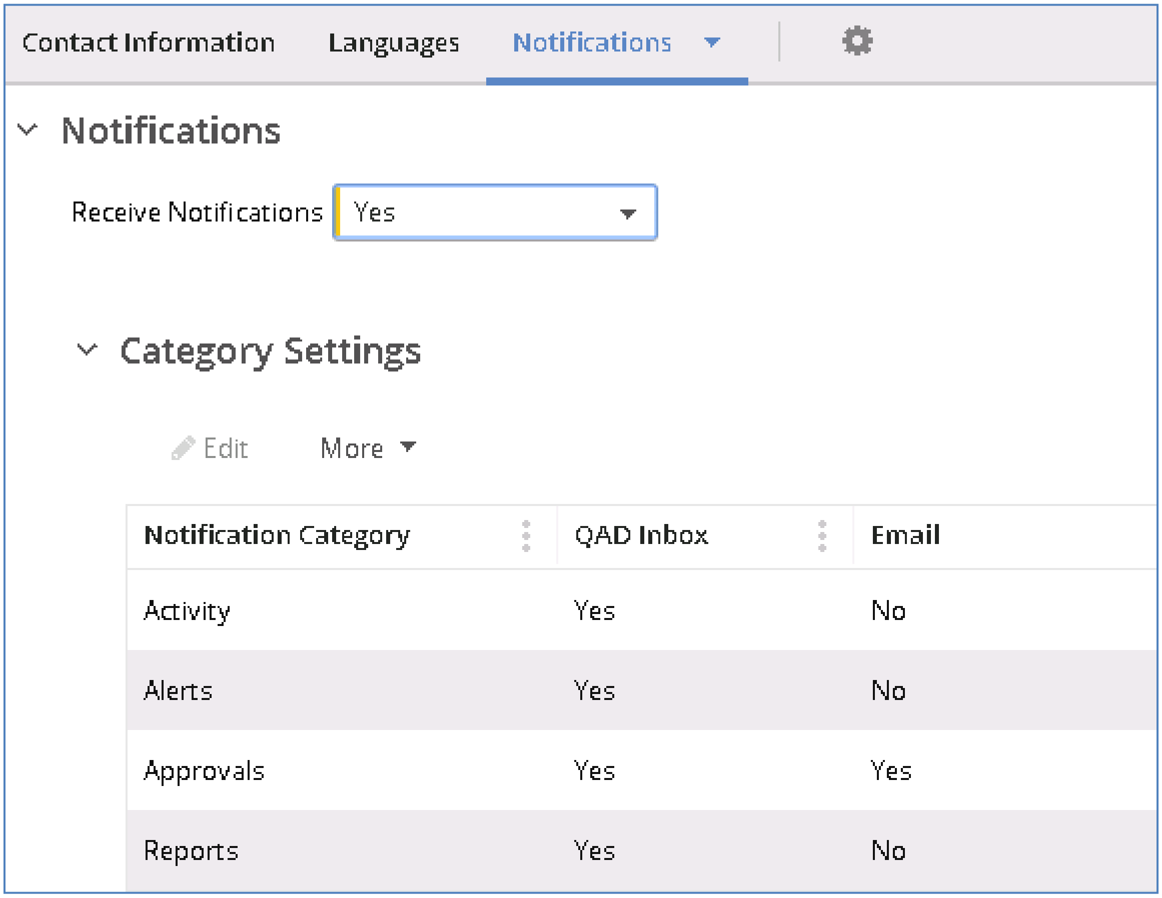
For example, you may want to always get alerts sent to your QAD Inbox and your email, but field tracking is not so important and it can go just to your QAD Inbox, and you may choose to never receive notifications for approval completions.

Demo

1. Click User icon
2. Select **Profile**



3. Click **Notifications** panel



Key Points

- Personalized notification
- Inbox and/or email

Demonstration Steps – Administrator Tools

You saw how a user (or administrator) can easily personalize the application – adding favorites, saving stored searches, setting up personalized screen views and saving them to reuse. Administrators have other tools they can use to tailor the system to business needs without customization.

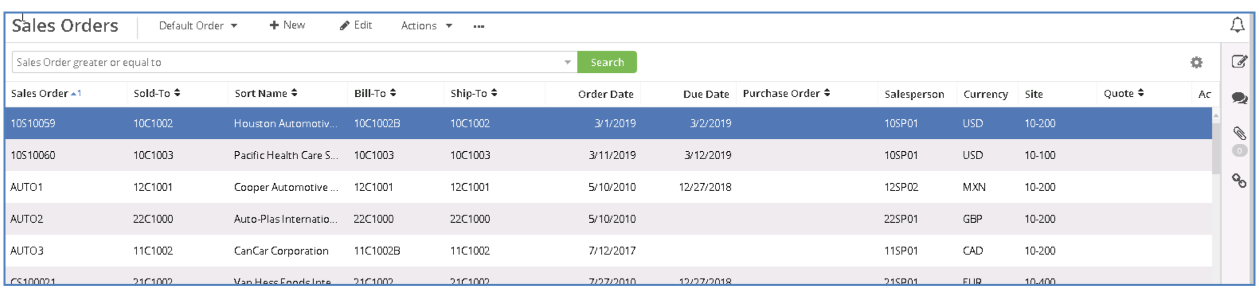
Screen Design

The first capability is screen design. Administrators (or any user with security access) can tailor any form, without intrusive customization – using a WYSIWYG (what you see is what you get) editor – adding or removing panels or fields, and adding new user-defined fields the company may choose to use to capture additional data, in this case to be applicable only for the UK.

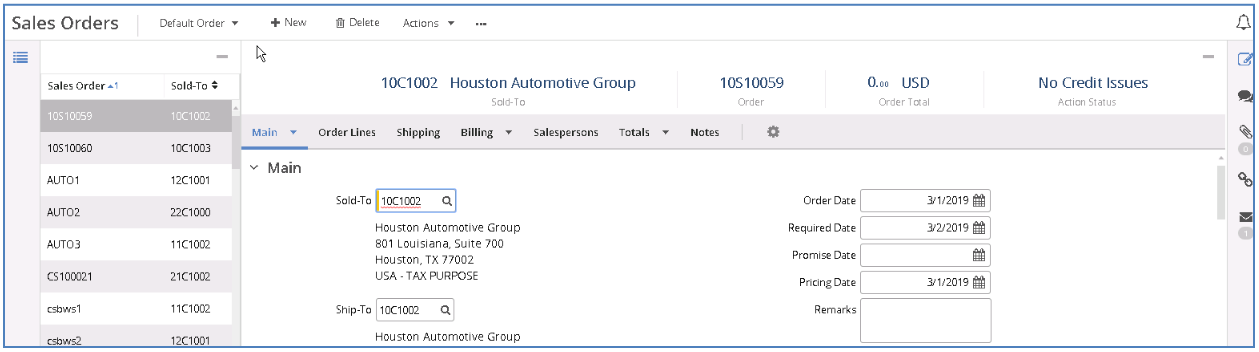
Move some fields to display in a different sequence on the form, remove a field and a panel, change display labels and add a few user fields. Please note that here we are simply using extra fields that QAD delivers, but be aware that you are not limited to only using these pre-defined fields. Using the QAD Enterprise Platform you can extend any Business Component (ie. SalesOrders) to add as many data fields as you may need; easily storing additional information unique to your business.

Demo

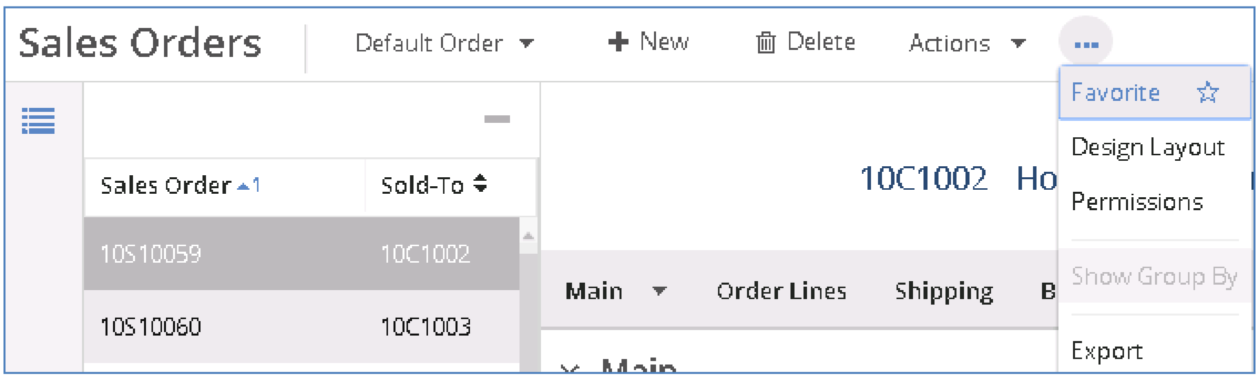
1. In Search, enter **Sales Orders**



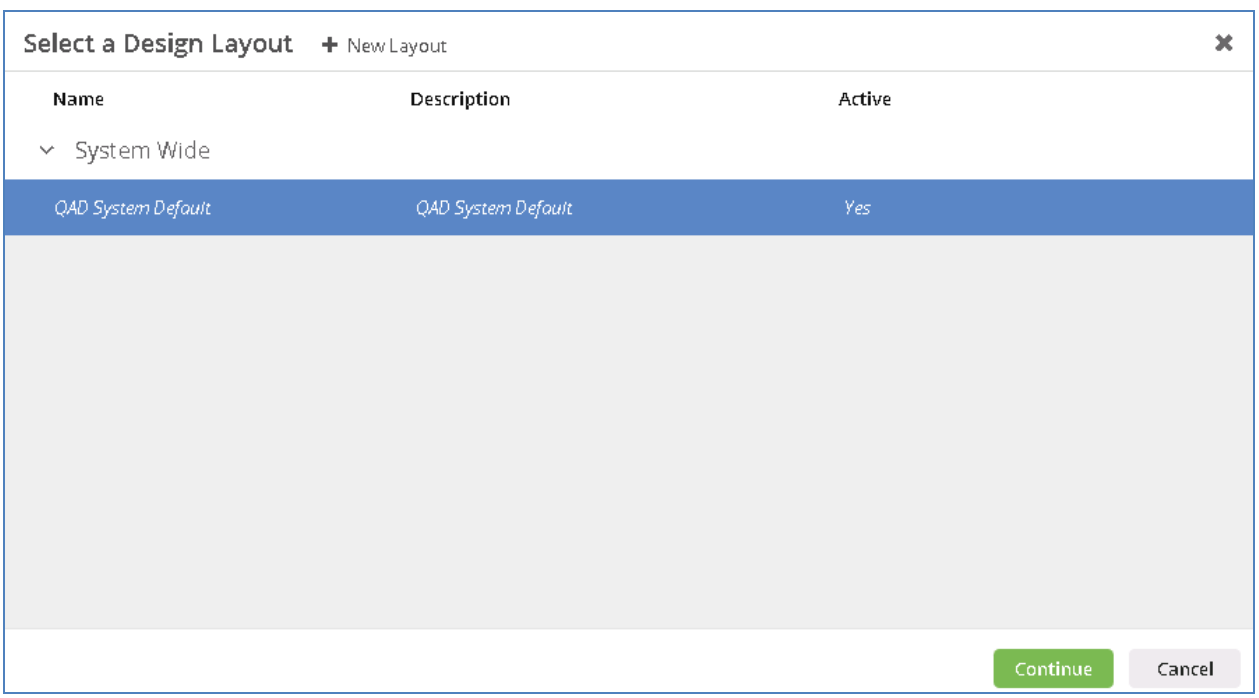
2. Highlight any sales order, click **Edit**



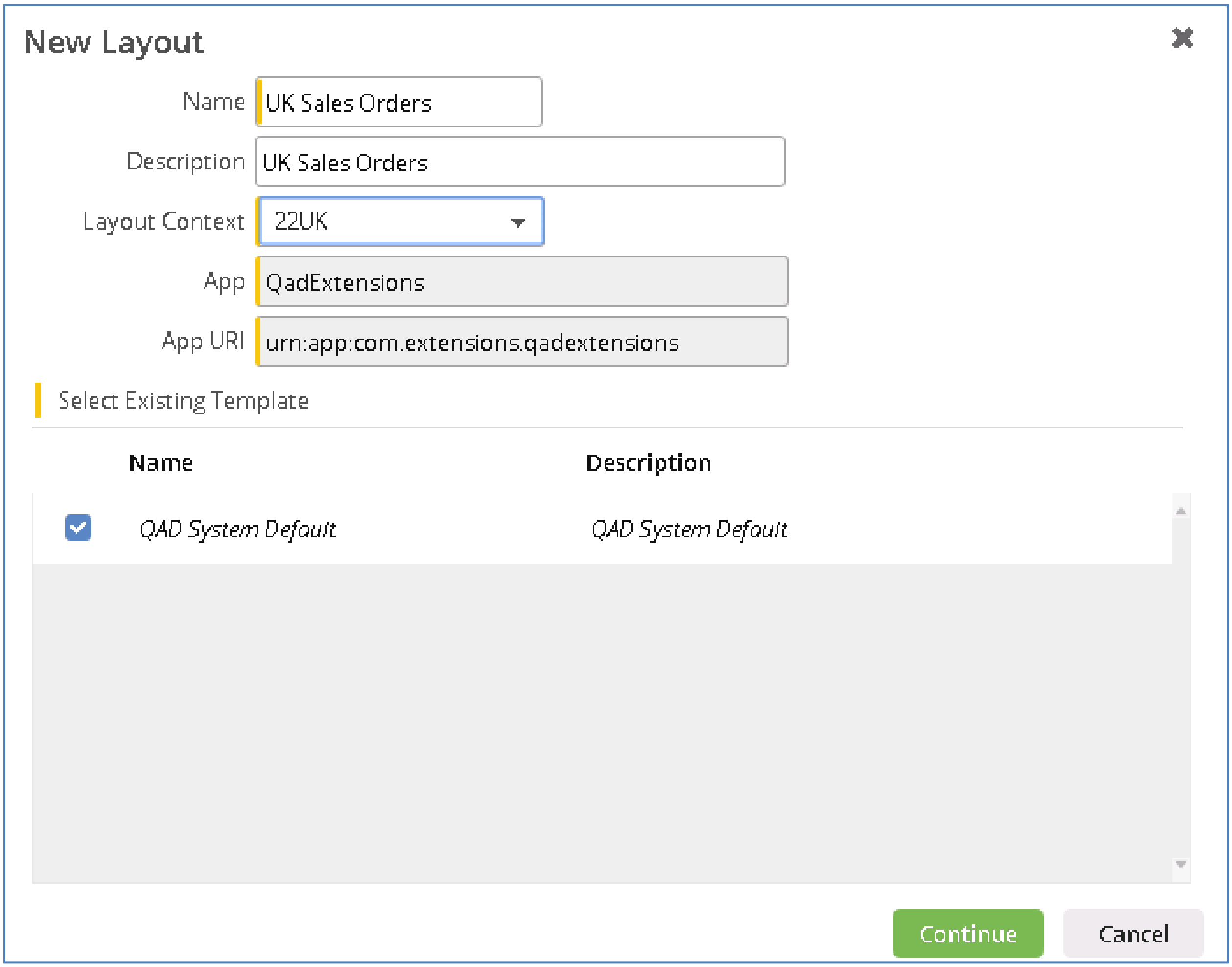
3. Click More ••• icon



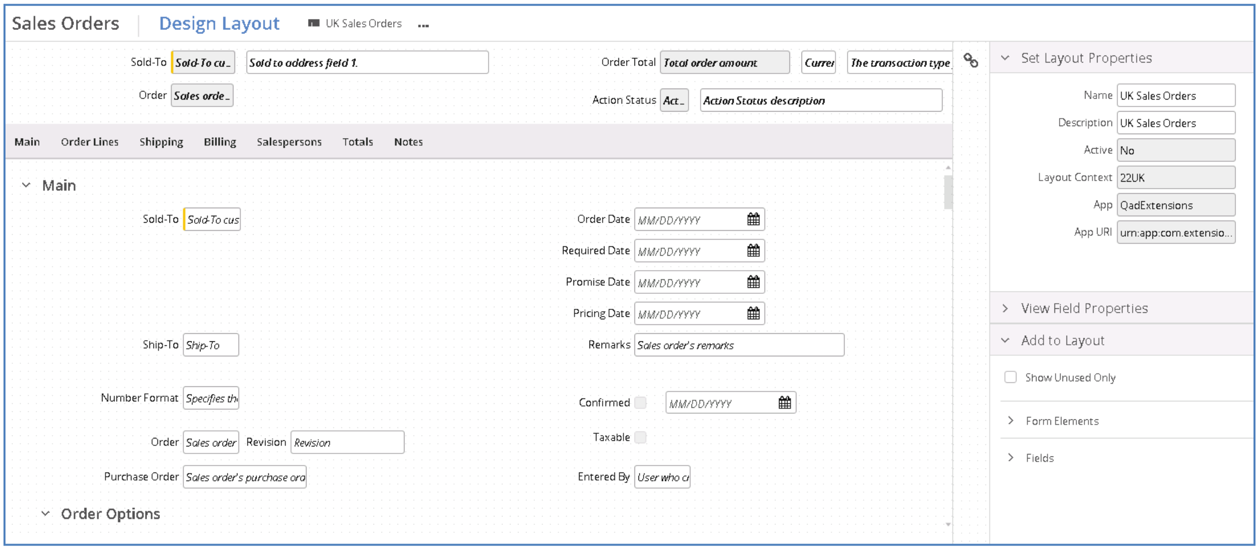
4. Select **Design Layout**



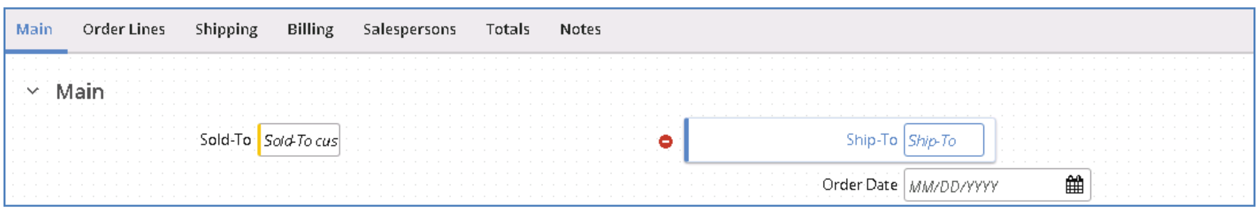
5. Click + New Layout
6. Enter Name: **UK Sales Orders**, Layout Context **22UK**



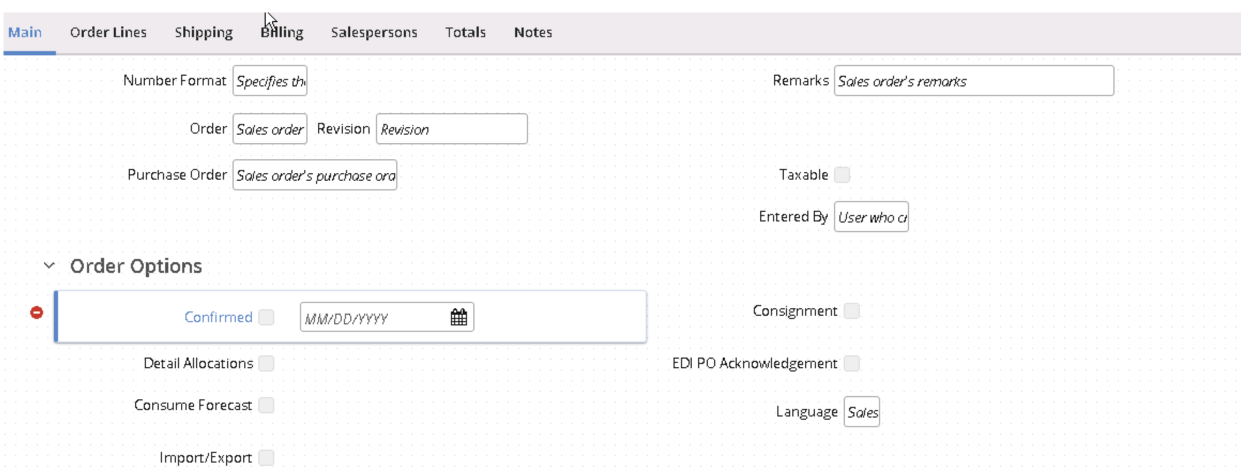
7. Click **Continue**



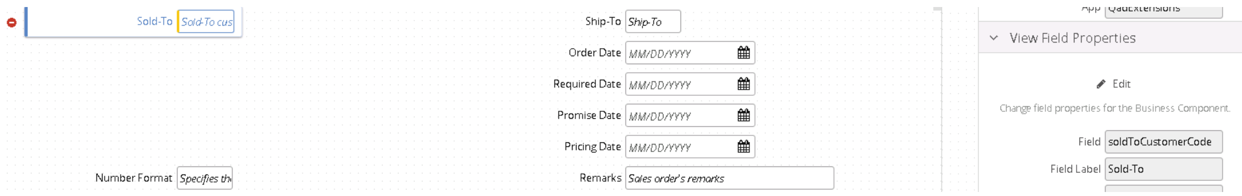
8. Drag & Drop **Ship-To** above Order Date



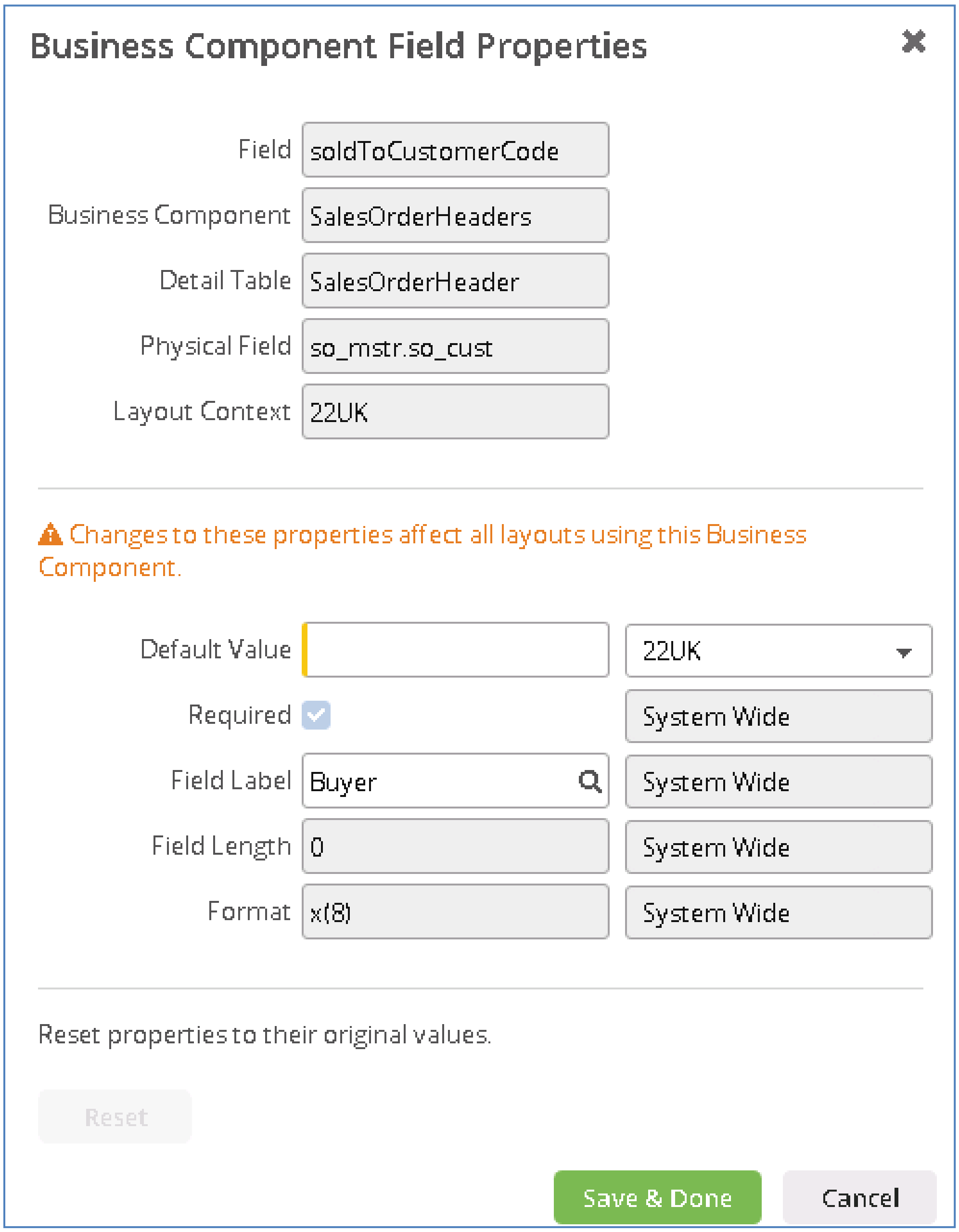
9. Drag & Drop **Confirmed** to Order Options panel



10. In Main, highlight **Sold-To**
11. Expand **View Field Properties**

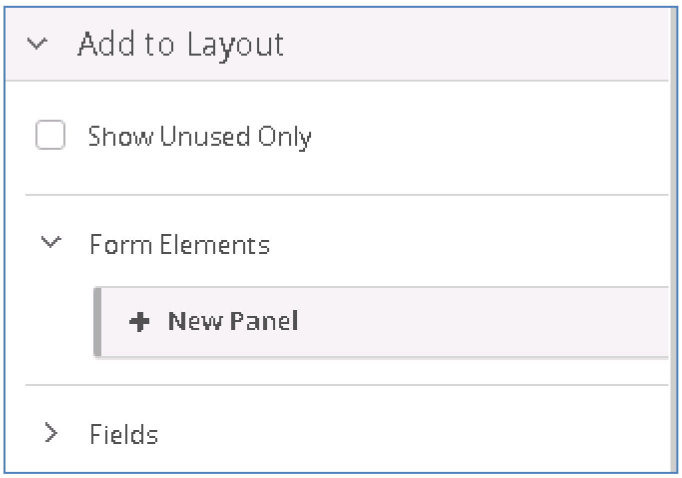


12. Click **Edit**
13. Enter Field Label **Buyer**

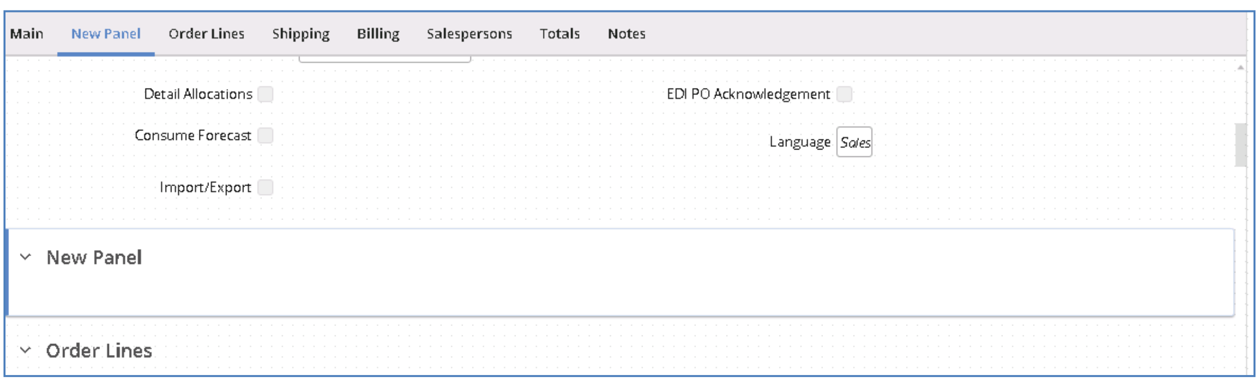


14. Click **Save & Done**

15. Collapse Main panel
16. On right, expand **Add to Layout > Form Elements**

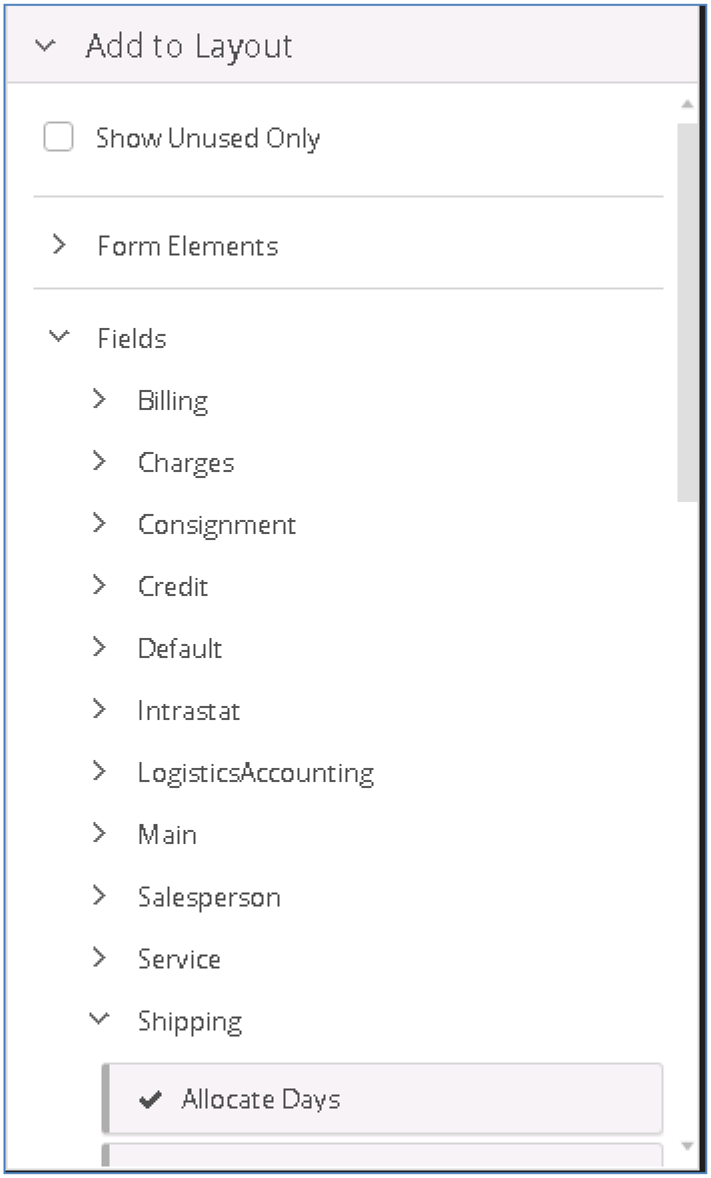


17. Drag & Drop + New Panel after Main



18. Highlight New Panel
19. Enter Display Label **UK Specific Data**

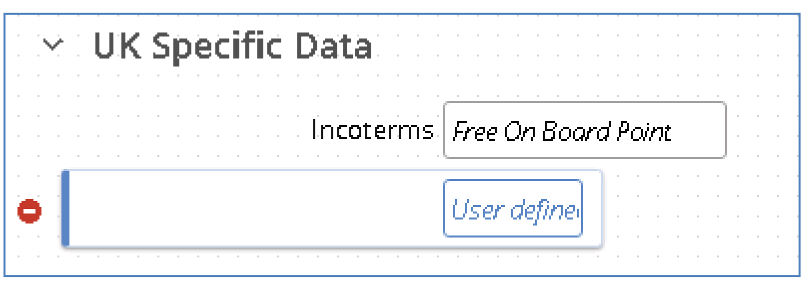
20. On right, expand **Add to Layout > Fields > Shipping**



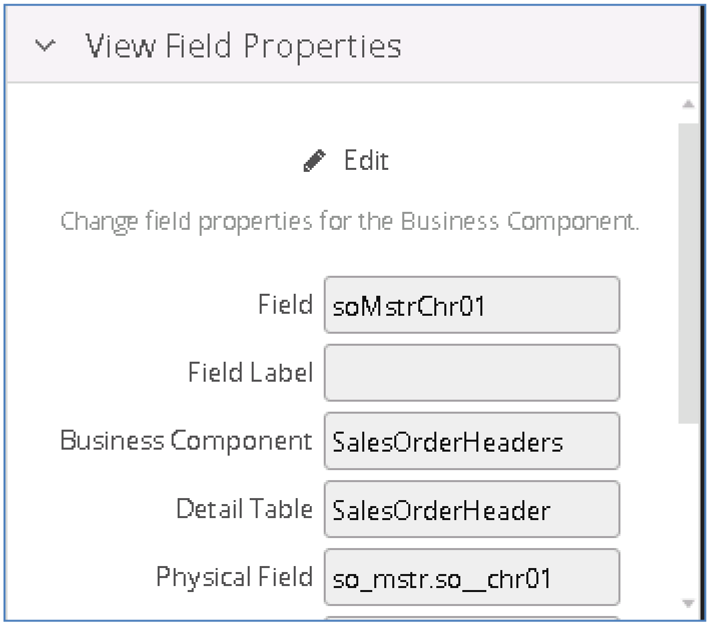
21. Page Down
22. Drag & Drop **Incoterms** to **UK Specific Data** panel

23. On right, expand **Add to Layout > Fields > User Defined Fields**

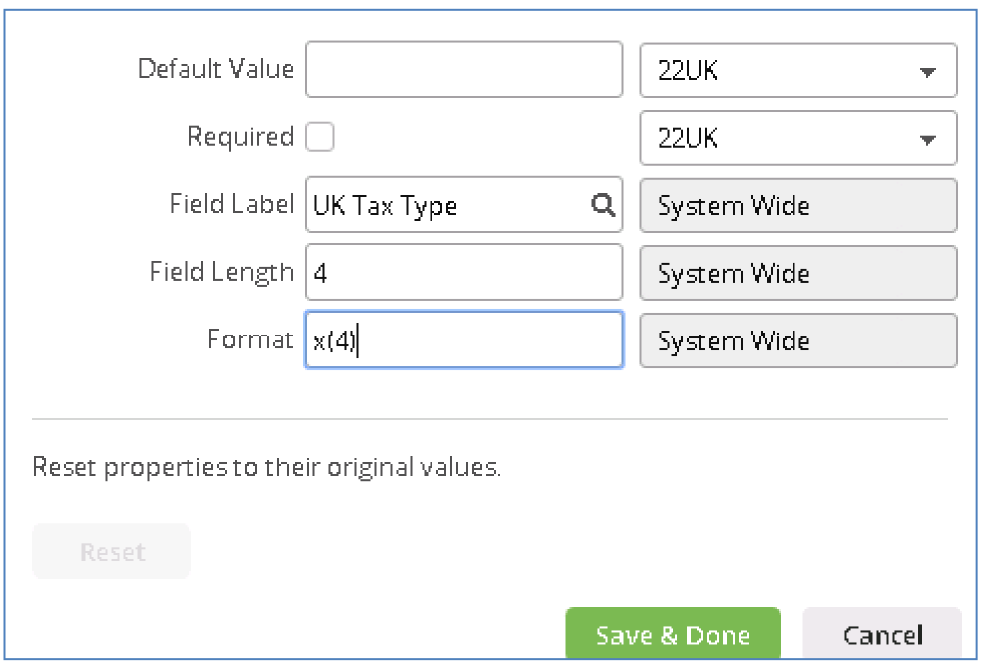
24. Drag & Drop **SoMstrChr01** to **UK Specific Data** panel



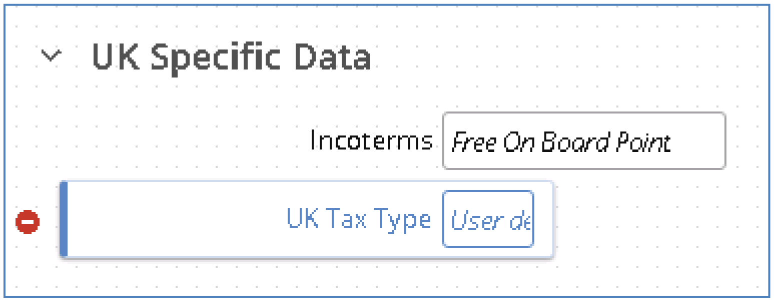
25. On right, **View Field Properties**



26. Click **Edit**
27. Enter Field Label **UK Tax Type**, Field Length **4**, Format **X(4)**



28. Click **Save & Done**



Key Points

- Change any form
- Add/remove fields/panels
- Include user-defined fields
- Save for all or some users

Drill-down Links

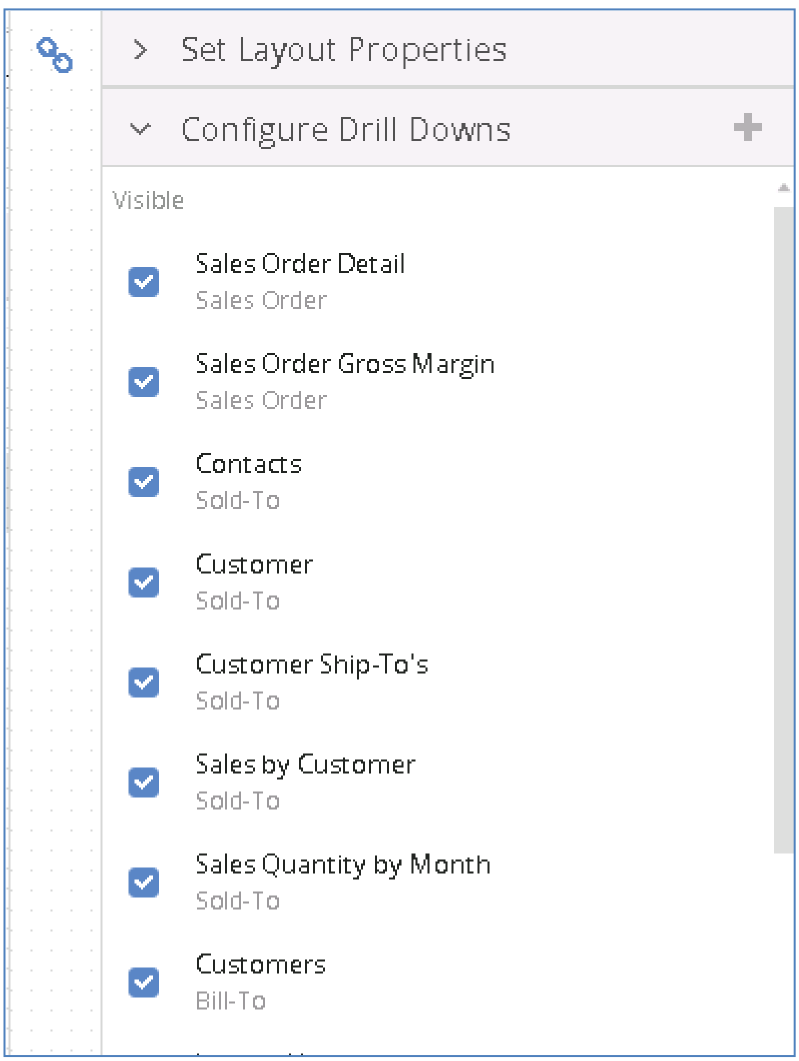
You can also review the associated links, and optionally hide any or all.

You can also attach other drill-down links – these may be predefined by QAD or they may be browses tailored to your company. All you need to do is attach the browse and define the field mapping – in this case, matching the sales order number in the two browses.

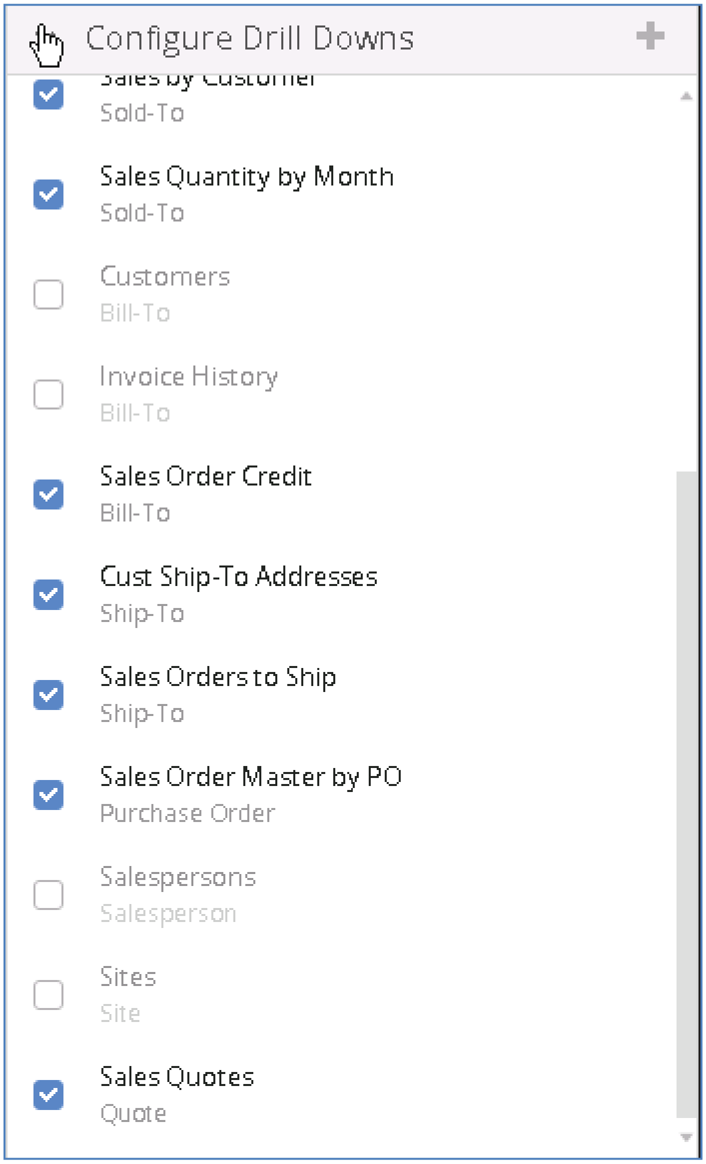
Note that these will only apply to users who access this design layout – in this case, users in Domain 22UKCO. You won't see these changes until you change domains.

Demo

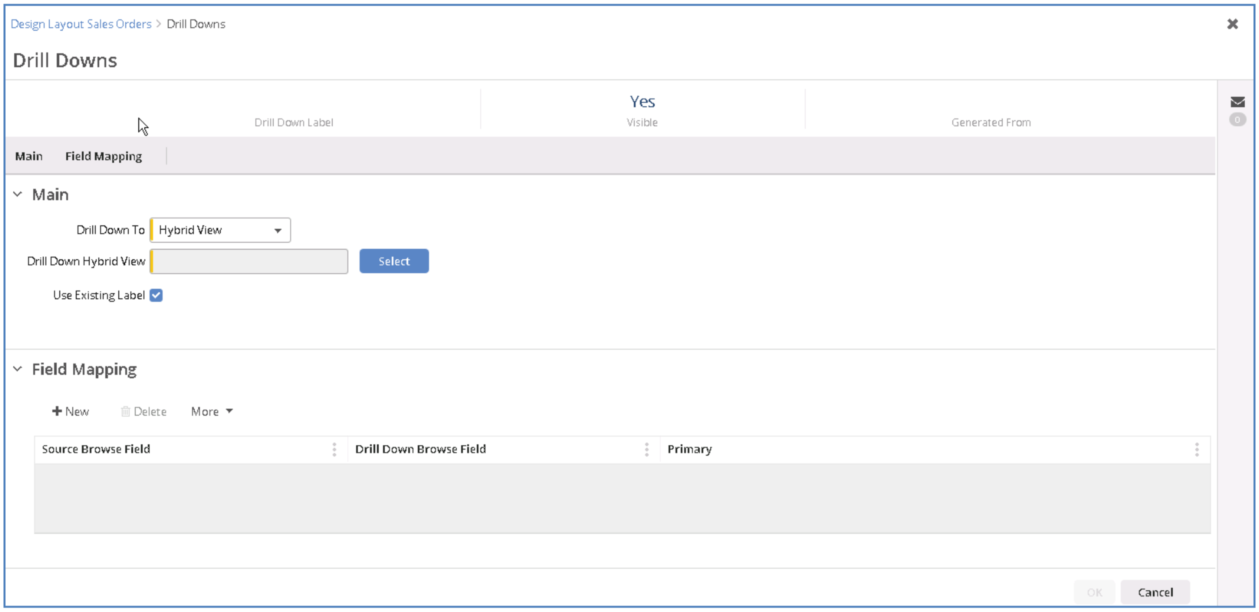
1. Click Links  icon



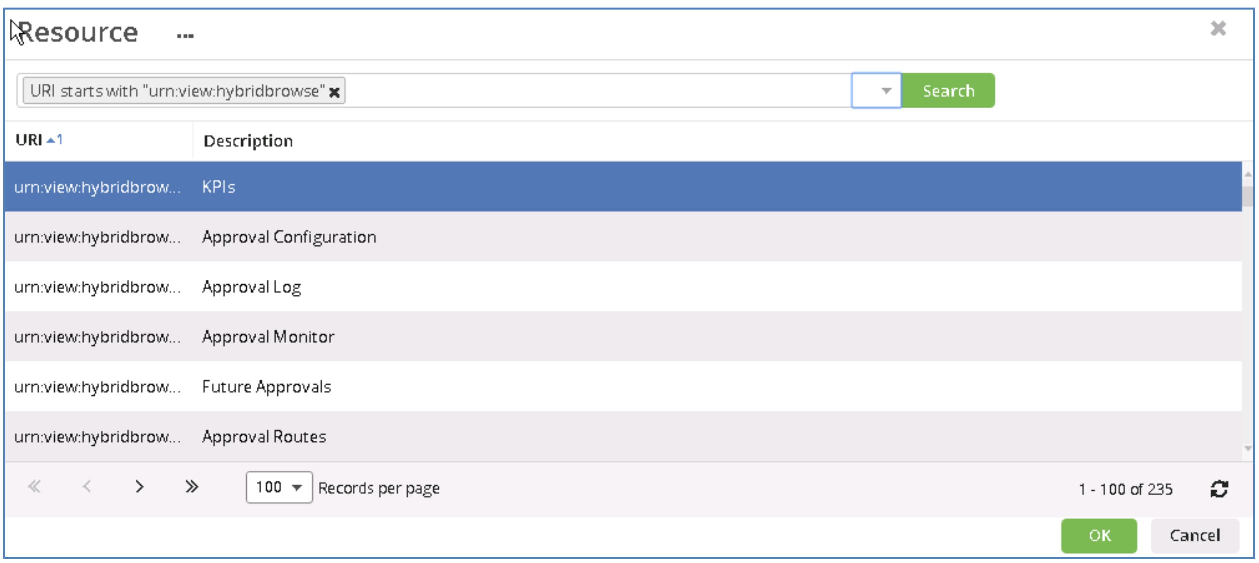
2. Uncheck **Contacts, Customer, Customers, Invoice History, Salespersons, Sites**



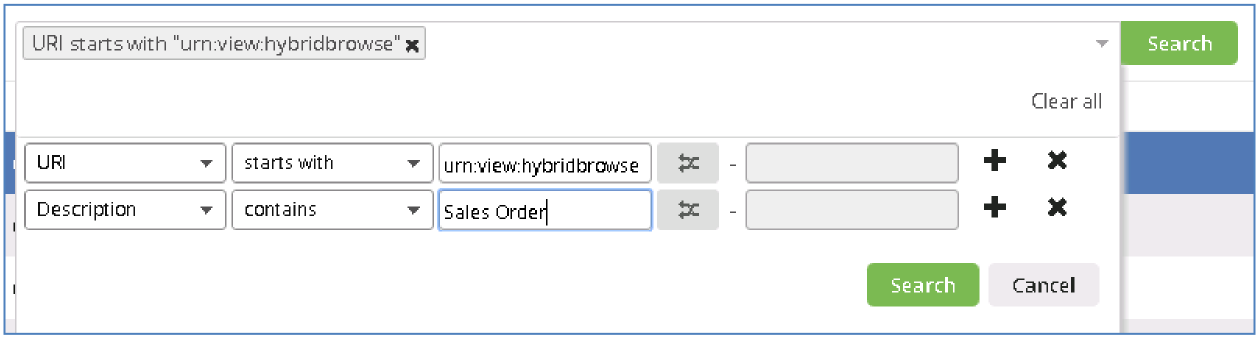
3. Click **Save**
4. In Configure Drill Downs, click Add icon



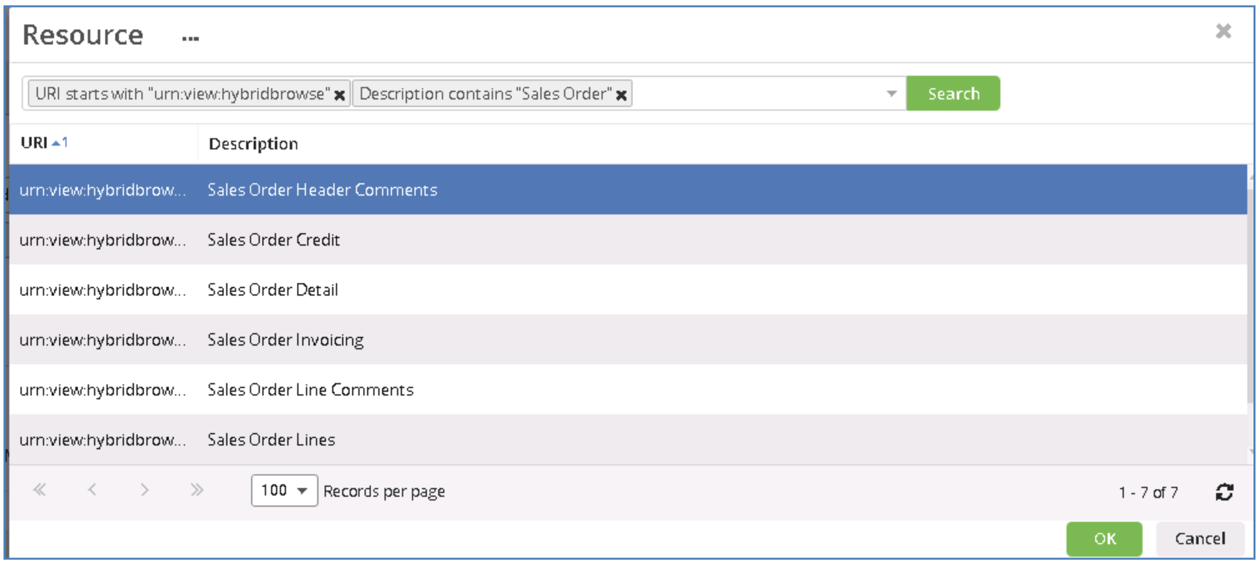
5. In Drill Down Hybrid View, click **Select**



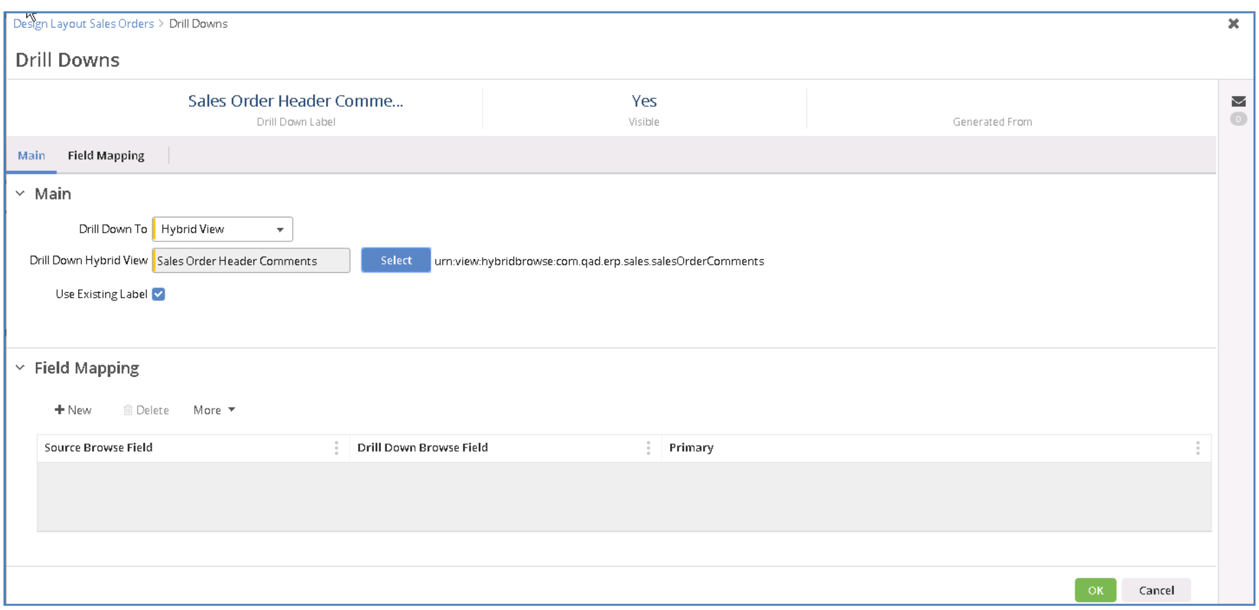
6. In Search, click drop-down
7. Enter **+ Description contains Sales Order**



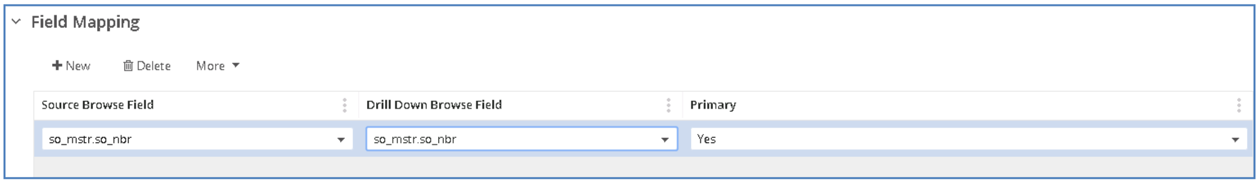
8. Click **Search**



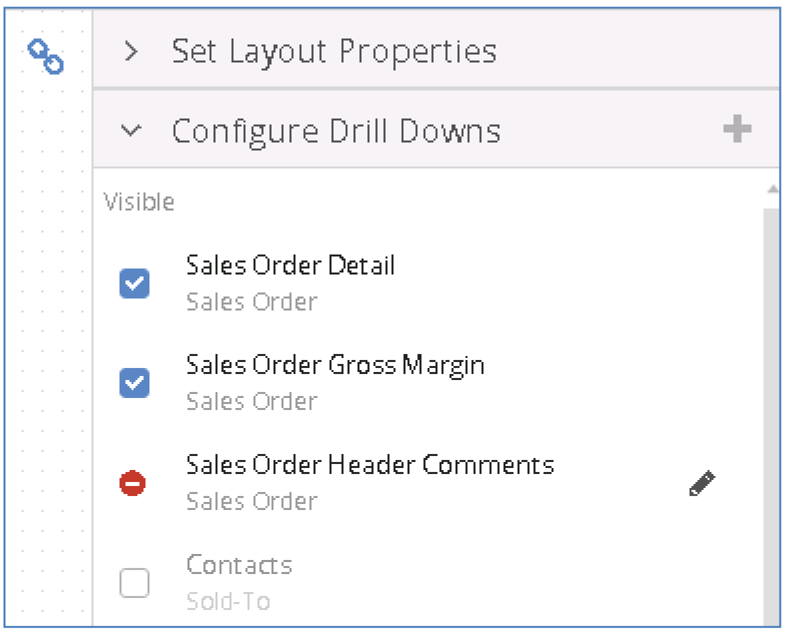
9. Highlight **Sales Order Header Comments**, click **OK**



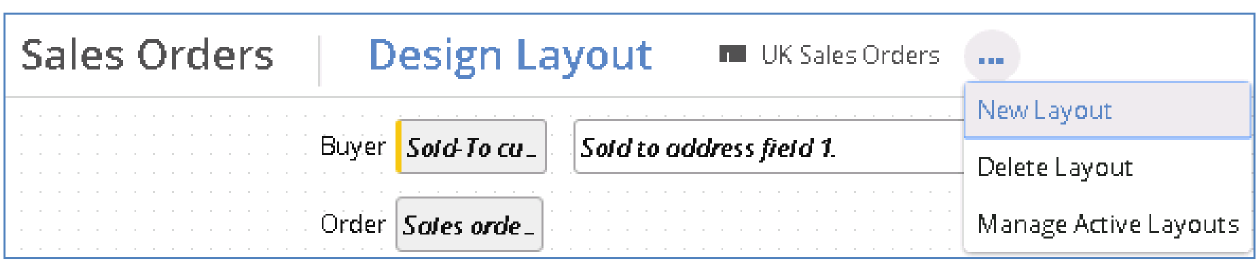
10. In Field Mapping, click **+New**
11. Using drop-downs, select Source Browse Field **so_mstr.so_nbr**, Drill Down Browse Field **so_mstr.so_nbr**



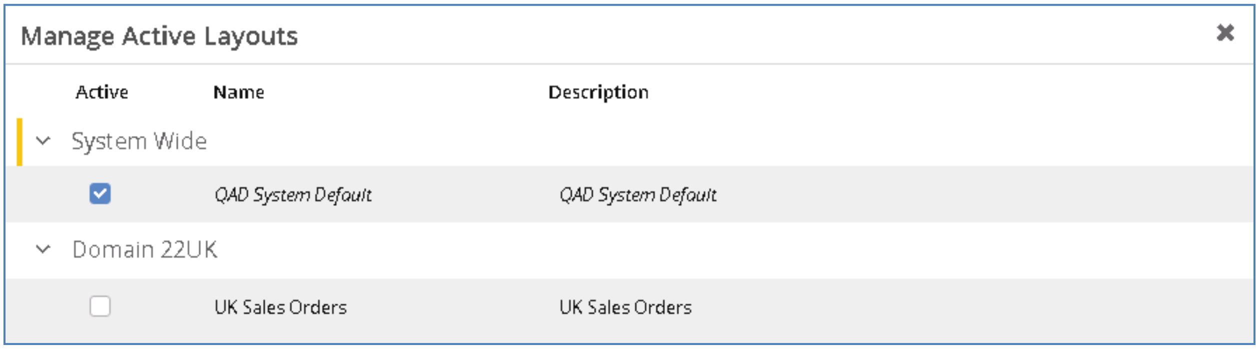
12. Click **OK**



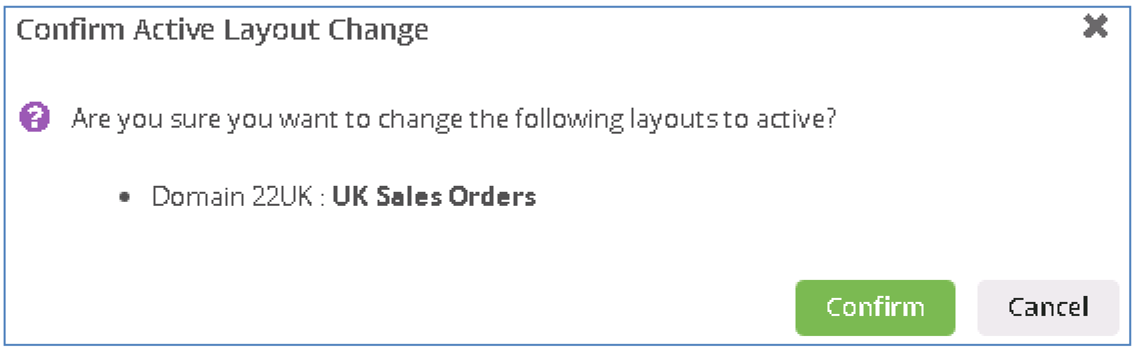
13. Click More icon



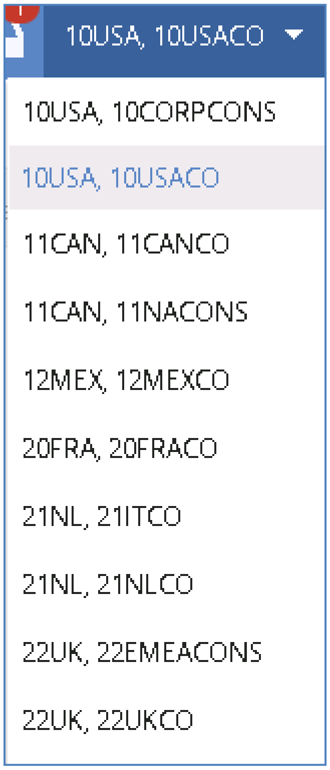
14. Click **Save**
15. Select **Manage Active Layouts**



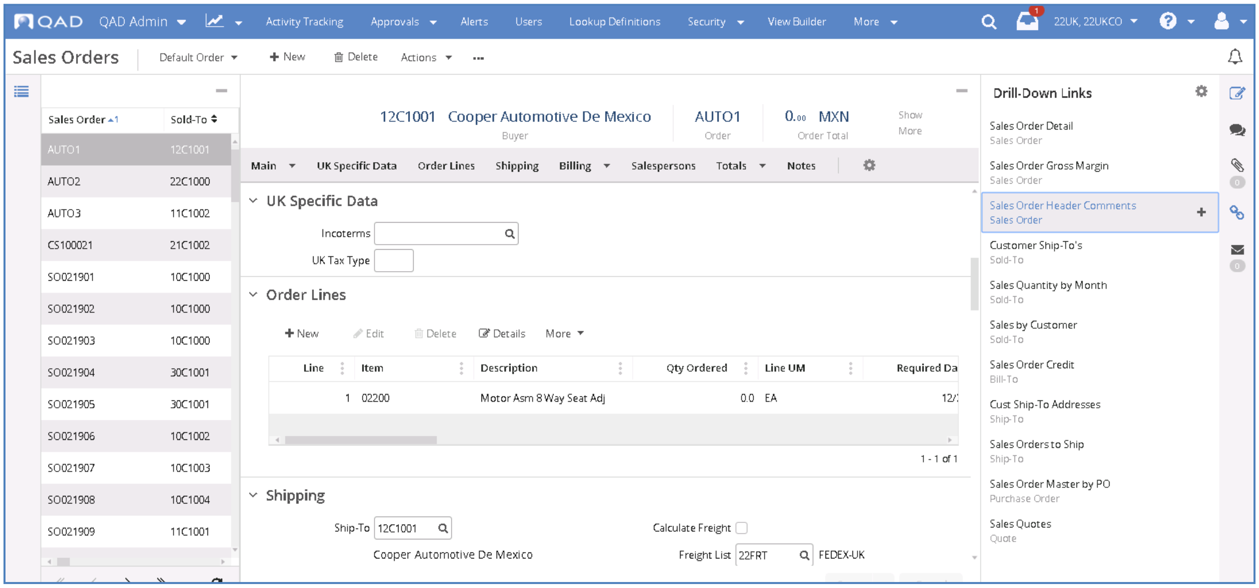
16. Check **UK Sales Orders**
17. Click **Apply**



18. Click **Confirm**
19. On Toolbar, click Domain drop-down



20. Select **22UKCO**
21. Click **Confirm**
22. In Search, enter **Sales Orders**
23. Highlight any sales order, click **Edit**
24. Select **UK Specific Data** panel
25. Click Links icon



Key Points

- Add/remove links

Lookup Browses

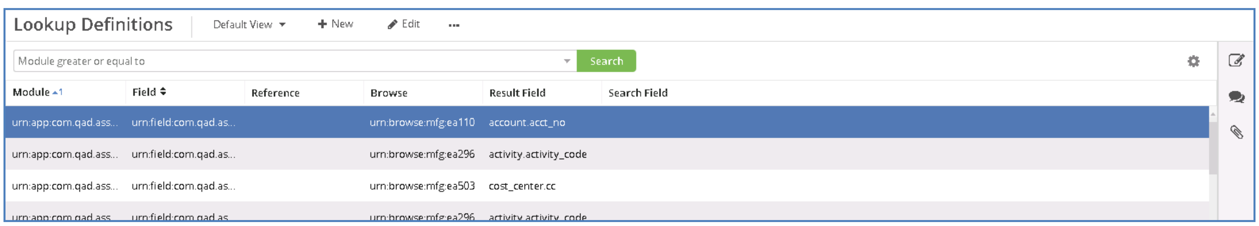
The other capability to note is the ability to add Lookup Browses. For example, the field that you just added to the UK version of the sales order may have specific values applicable to it.

In this example, we will use Generalized Codes to record the values and then use a lookup browse to attach the list so you will see them as a drop-down.

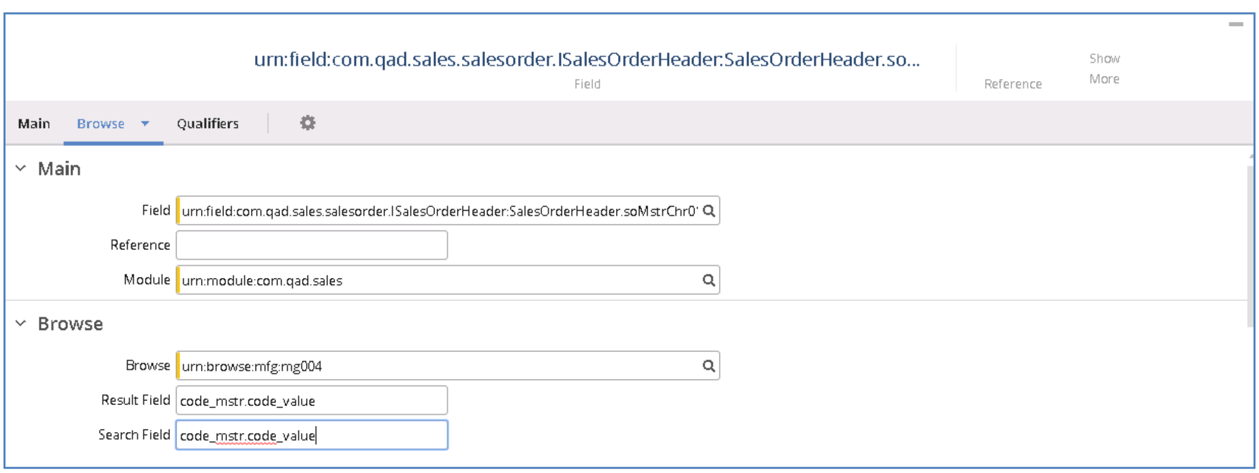
Note that if you used the QAD Enterprise Platform to extend the Sales Orders business component, you use standard entry forms to set up the values and then attach a browse on this business component as the lookup browse..

Demo

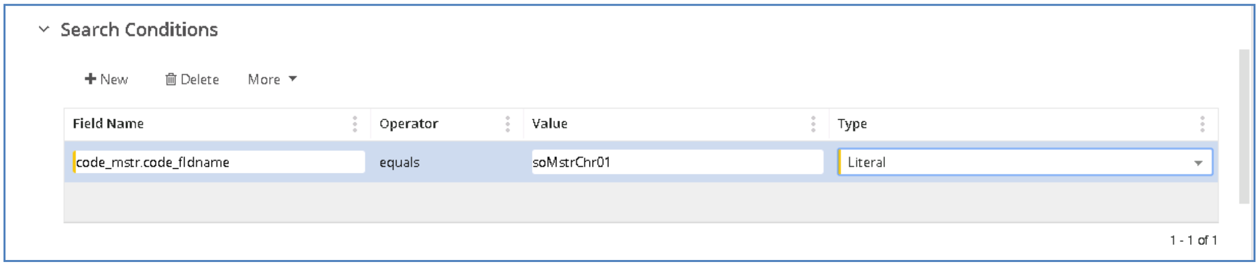
1. In Menu, right-click **Lookup Definitions**, Open link in new tab



2. Click **+New**
3. Enter Field <urn:field:com.qad.sales.salesorder.ISalesOrderHeader:SalesOrderHeader.soMstrChr01>, Module **urn:module:com.qad.sales**, Browse **urn:browse:mfg:mg004** (Generalized Codes Browse), Result Field **code_mstr.code_value**, Search Field **code_mstr.code_value**

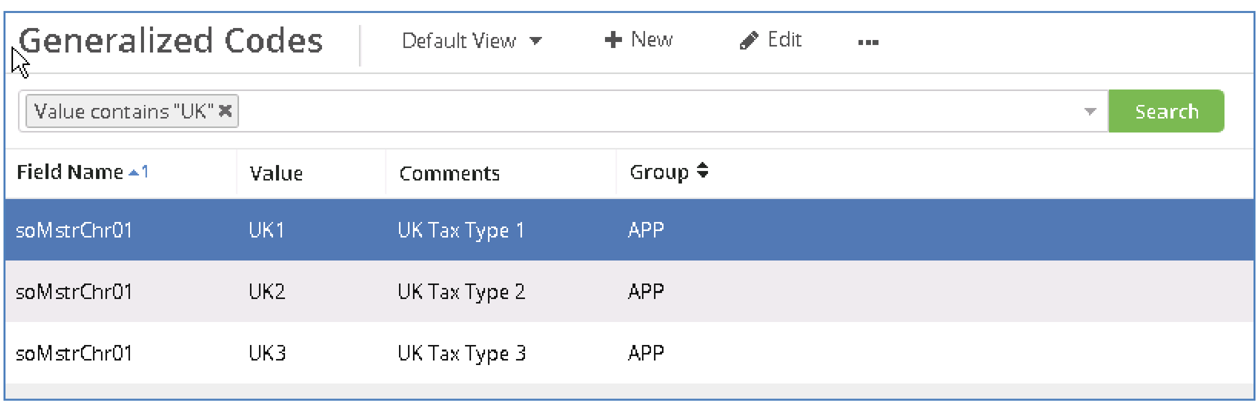


4. In Search Conditions, click **+New**
5. Enter **code_mstr.code_fldname equals soMstrChr01, Literal**



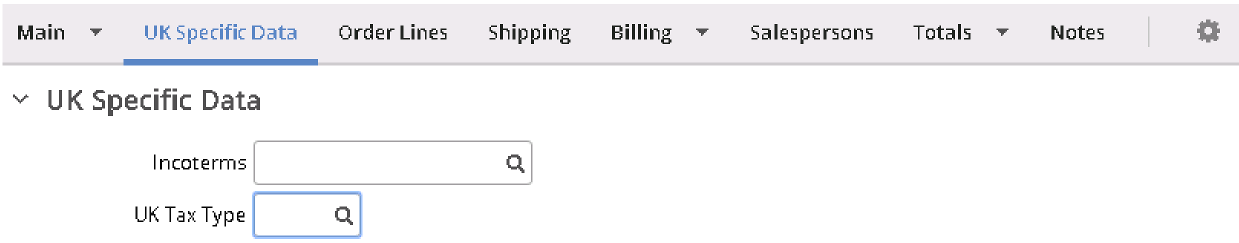
6. Click **Save**
7. In Search, enter **Generalized Codes**, right-click, Open link in new tab
8. Click **+ New**
9. Enter Field Name **soMstrChr01**, Value **UK1**, Comments **UK Tax Type 1**, Group **App, Save**

10. Click **+ New**
11. Enter Field Name **soMstrChr01**, Value **UK2**, Comments **UK Tax Type 2**, Group **App, Save**
12. Click **+ New**
13. Enter Field Name **soMstrChr01**, Value **UK3**, Comments **UK Tax Type 3**, Group **App, Save**

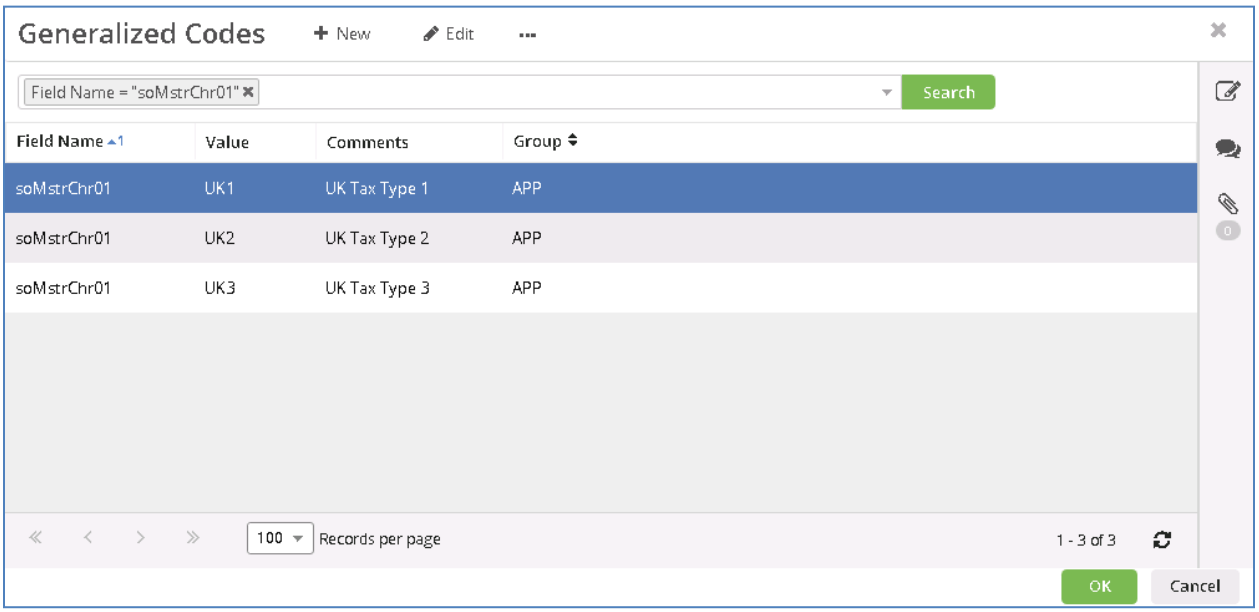


14. Click **Sales Orders** tab
15. Click **+New**

16. Click **UK Specific Data** panel



17. In **UK Tax Type**, click drop-down



18. (Optionally) highlight any line, click **OK**

Key Points

- Use Generalized Codes to specify list of values
- Use Lookup Browse to create drop-down

Closing

In closing, the Channel Islands User Experience (Web UI) empowers the Effective User – where user tasks are streamlined, accelerated by supporting systems, and perfectly aligned with the company's business processes.

Actionable Insights, powerful search tools, notifications and alerts, and built-in workflow enhance decision making and improve performance, while personalization and system tailoring tools adapt the system to match your business processes and user preferences without invasive customization.

That's Next Generation ERP

Rapid – Agile – Effective