



# 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

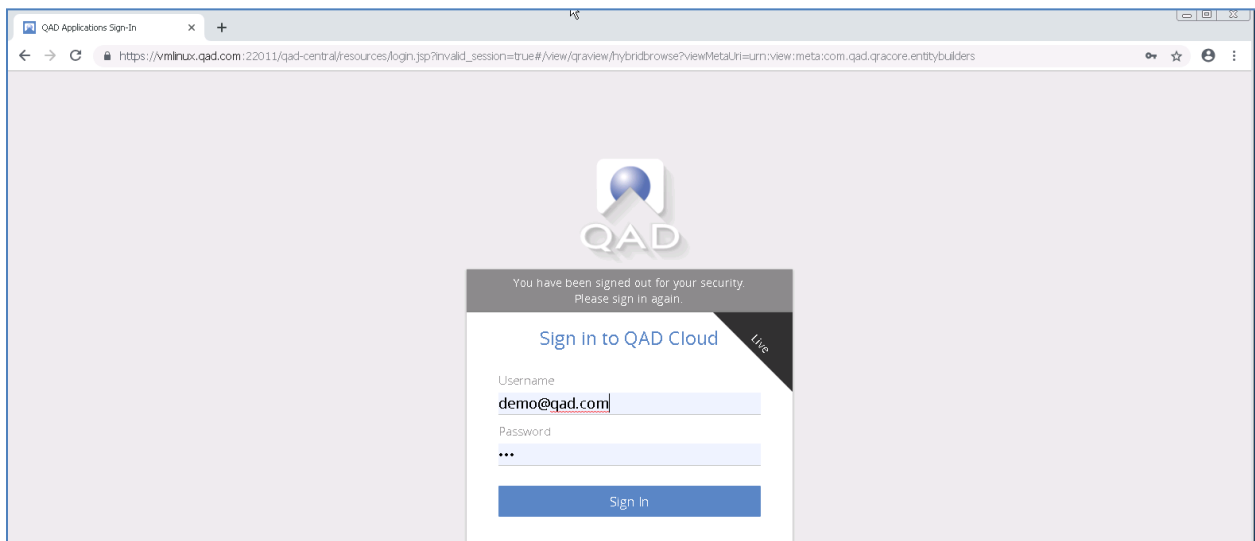
### UI Freedom

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](mailto:demo@qad.com), Password **qad**



3. Click **Sign In**

### Key Points

- Device independent
- Single Sign On (SSO)



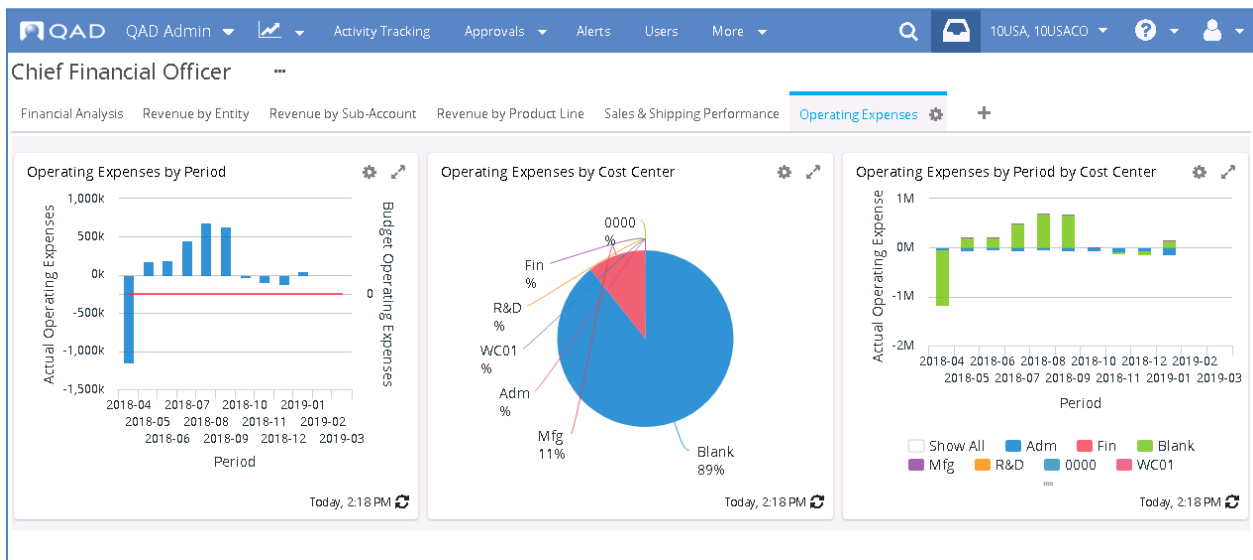
### Actionable Insights

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

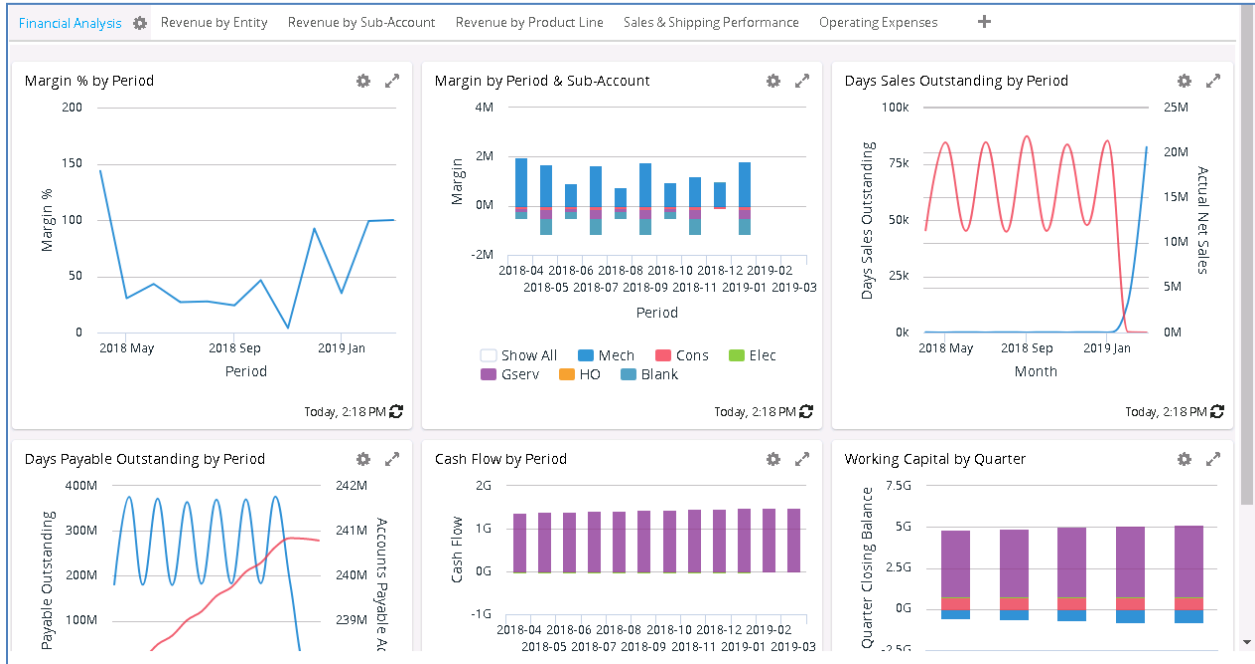
1. On Toolbar, click Action Center  icon
2. Select **Chief Financial Officer**




3. On Toolbar, click User  icon

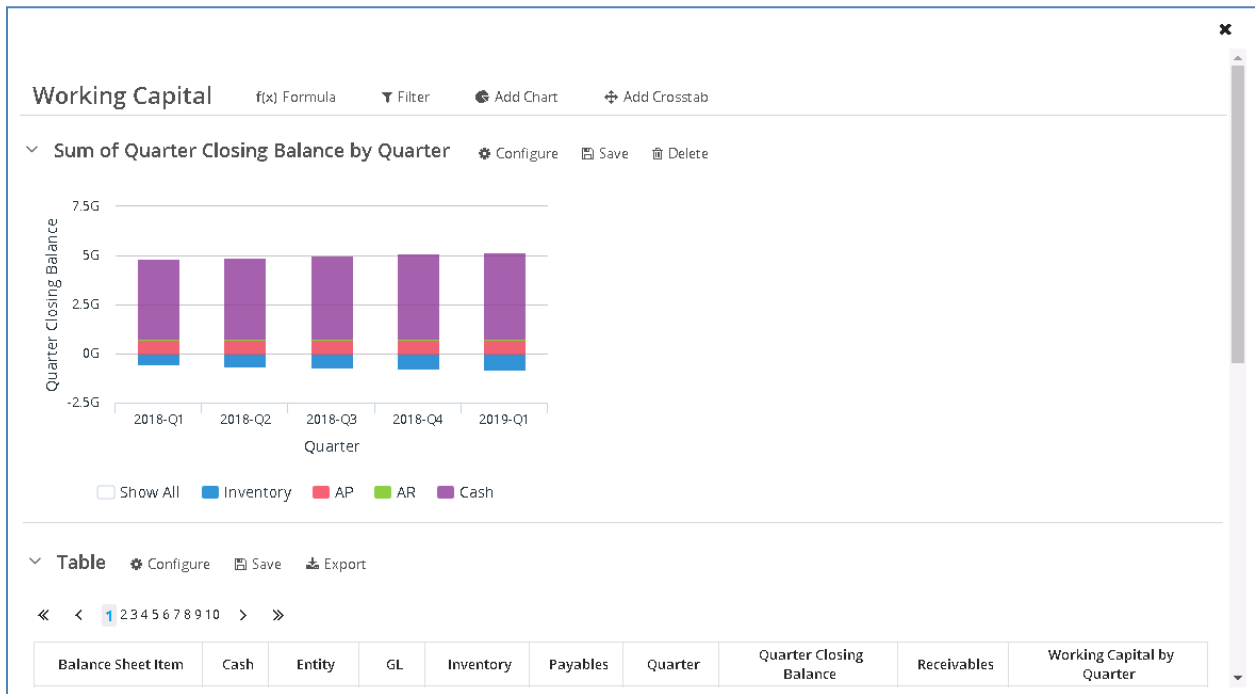
Note: set current as home

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



Table [Configure] [Save] [Export]

<< < 1 2 3 4 5 6 7 8 9 10 > >>

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		0	2018-Q4	121k	0	496024822.06

8. Click [Configure]

Table [Configure] [Save] [Export]

Columns Sort Group Aggregate Paging

Hide and show columns.

(All)       Entity       Payables       Receivables  
 Balance Sheet Item     GL       Quarter       Working Capital by Quarter  
 Cash       Inventory     Quarter Closing Balance

OK

9. Click [Export]

Note options to export to Excel, CSV, PDF

Table [Configure] [Save] [Export]

Columns Sort Group Aggregate Paging

Hide and show columns.

Excel  
CSV  
PDF

10. Close window

### Key Points

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



### Security and Control

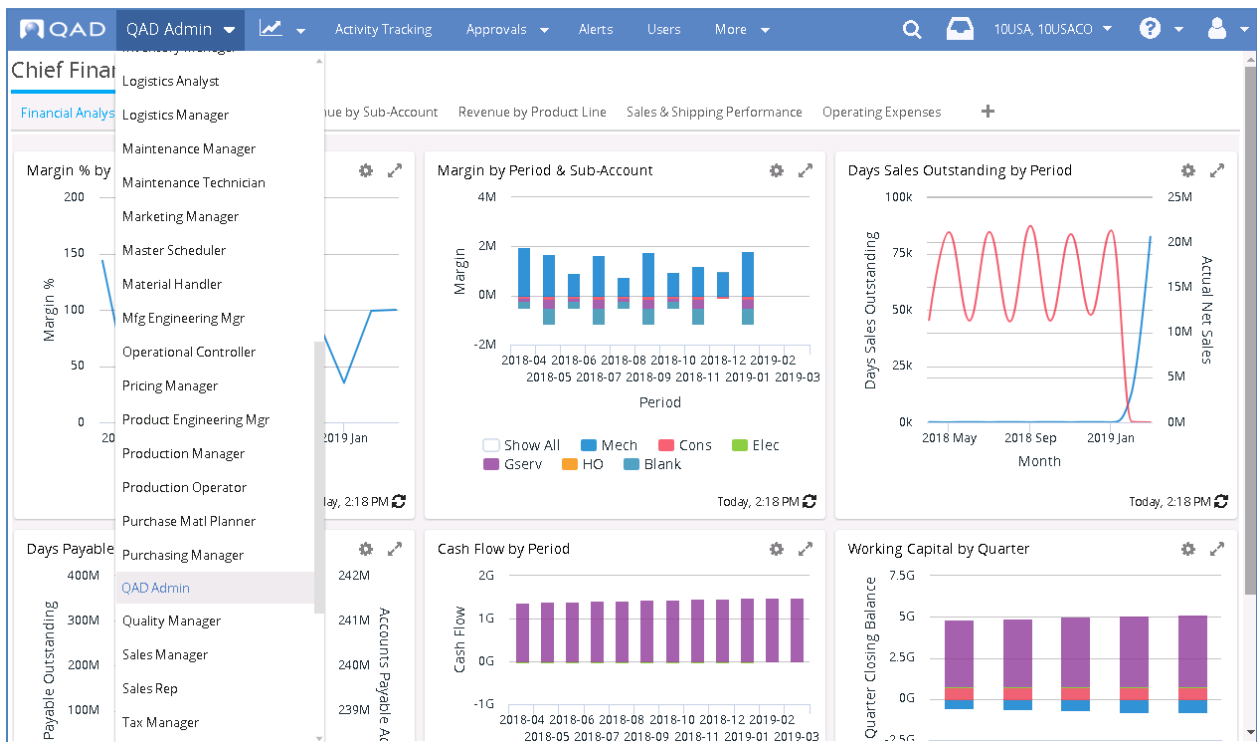
The user logon determines what Action Centers and Menus the user has access to. These are based on role. Any user can belong to one or more roles. When they change roles; the menu bar changes.

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](mailto:csr@qad.com), Password **qad**



Sign in to QAD Cloud Live

Username  
csr@qad.com

Password  
...

Sign In

5. Select **Customer Service Rep** role

QAD Customer Service Rep

Sales Orders Sales Quotes Customers More

10USA, 10USACO

Welcome, Sales Admin (Order Entry Clerk)

You can set any page as your home page. For example, choose a dashboard from the drop-down and select 'Set Current as Home' from the user menu.

**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

Sales Order	Sold-To	Sort Name	Bill-To	Ship-To	Order Date	Due Date	Purchase Order	Salesperson
10S10059	10C1002	Houston Automotiv...	10C1002B	10C1002	3/1/2019	3/2/2019		10SP01
AUTO1	12C1001	Cooper Automotive ...	12C1001	12C1001	5/10/2010	12/27/2018		12SP02
AUTO2	22C1000	Auto-Plas Internatio...	22C1000	22C1000	5/10/2010			22SP01
AUTO3	11C1002	CanCar Corporation	11C1002B	11C1002	7/12/2017			11SP01
CS100021	21C1002	Van Hess Foods Inte...	21C1002	21C1002	7/27/2010	12/27/2018		21SP01
csbws1	11C1002	CanCar Corporation	11C1002B	11C1002	4/13/2011			11SP01

3. Click More

Sales Order	Sold-To	Sort Name	Bill-To	Ship-To
10S10059	10C1002	Houston Automotiv...	10C1002B	10C1002
AUTO1	12C1001	Cooper Automotive ...	12C1001	12C1001

- Favorite
- Design Layout
- Permissions
- Show Group By
- Export

4. Click Favorite



**Add Favorite** ✕

Name Sales Orders





Folder Favorites ▼


OK Cancel

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**

  10USA, 10USACO ▼  ▼  ▼

 purchase orders ✕

1 Result

 Purchase Orders

10. Click Favorite  icon

**Add Favorite** ✕

Name Purchase Orders

Folder Favorites ▼

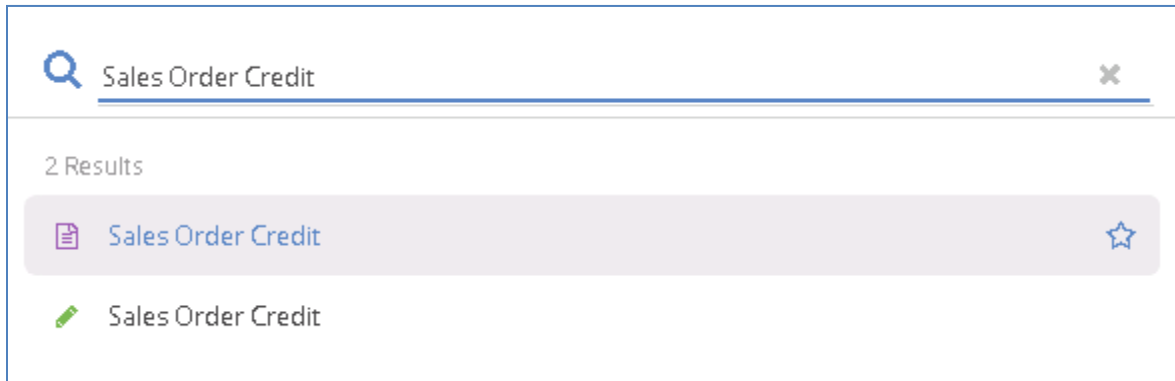
OK Cancel



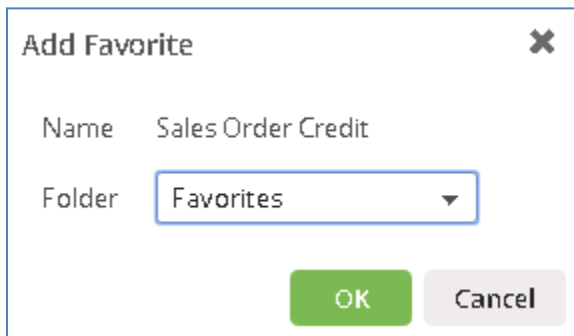
11. Click **OK**

12. In Search , enter **Sales Order Credit**

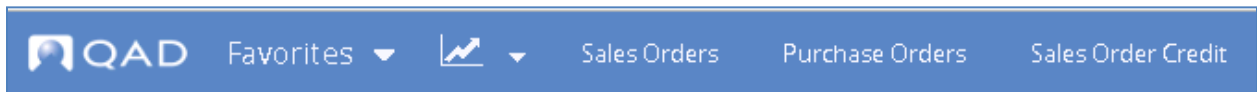
Note there are two – a “pencil” for editing sales order credit and a report



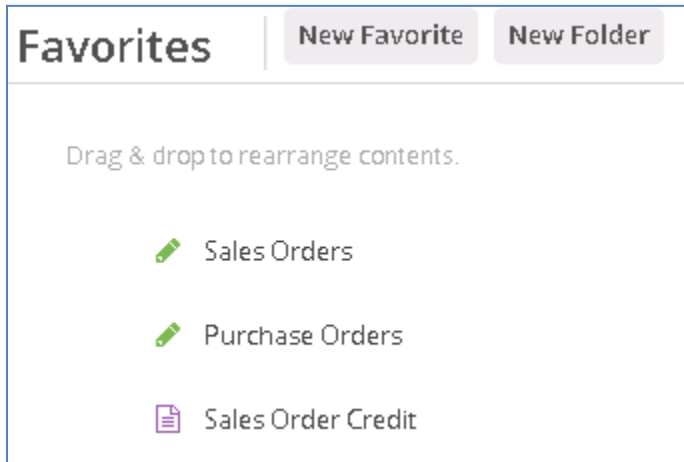
13. On report , click Favorite  icon



14. Click **OK**

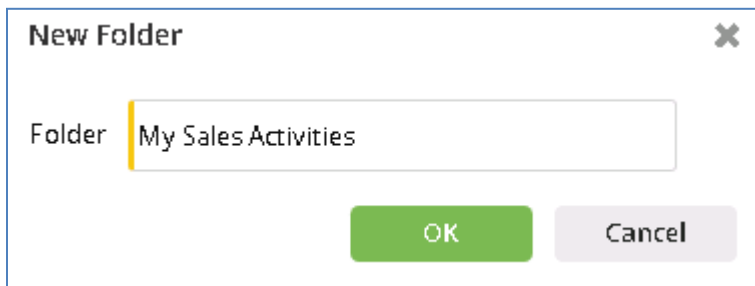


15. Click User , select **Favorites**

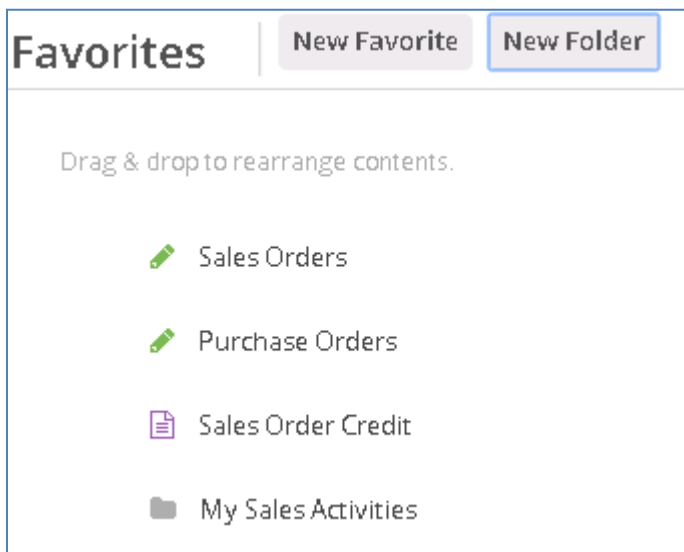


16. Click **New Folder**

17. Enter Folder **My Sales Activities**



18. Click **OK**



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



**Favorites** | **New Favorite** **New Folder**

Drag & drop to rearrange contents.

- Purchase Orders
- My Sales Activities
- Sales Orders
- Sales Order Credit

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

Sales Order Price

1 Result

- Sales Order Price

21. Click Favorite icon

22. In Folder, click drop-down

**Add Favorite**

Name Sales Order Price

Folder

- Favorites
- My Sales Activities






23. Select **My Sales Activities**

24. Click **OK**



**Favorites** | **New Favorite** | **New Folder**

Drag & drop to rearrange contents.

-  Purchase Orders
-  My Sales Activities
  -  Sales Orders
  -  Sales Order Credit
  -  Sales Order Price

**Key Points**

- User Favorites menu
- Optional groupings



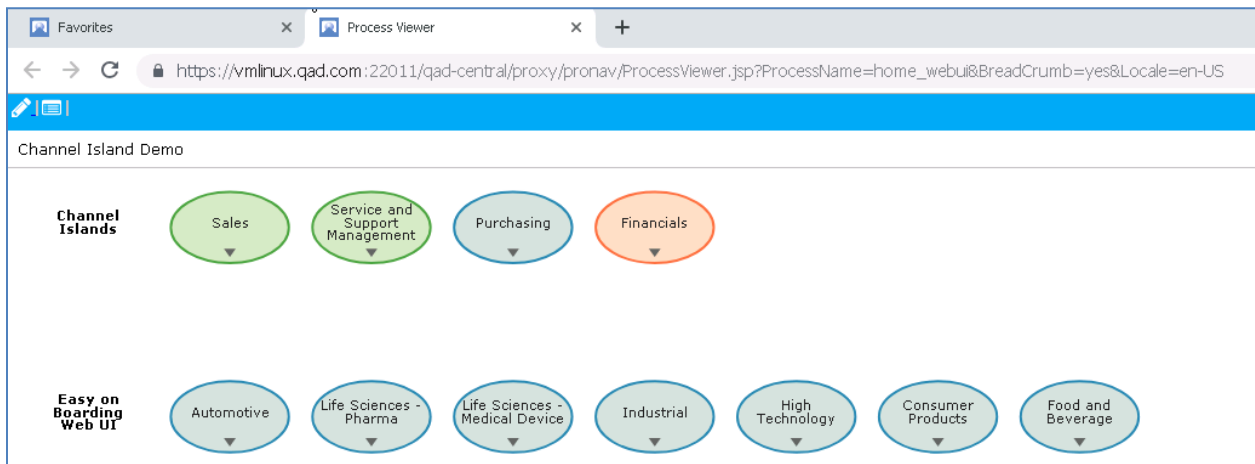
## Process Maps

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

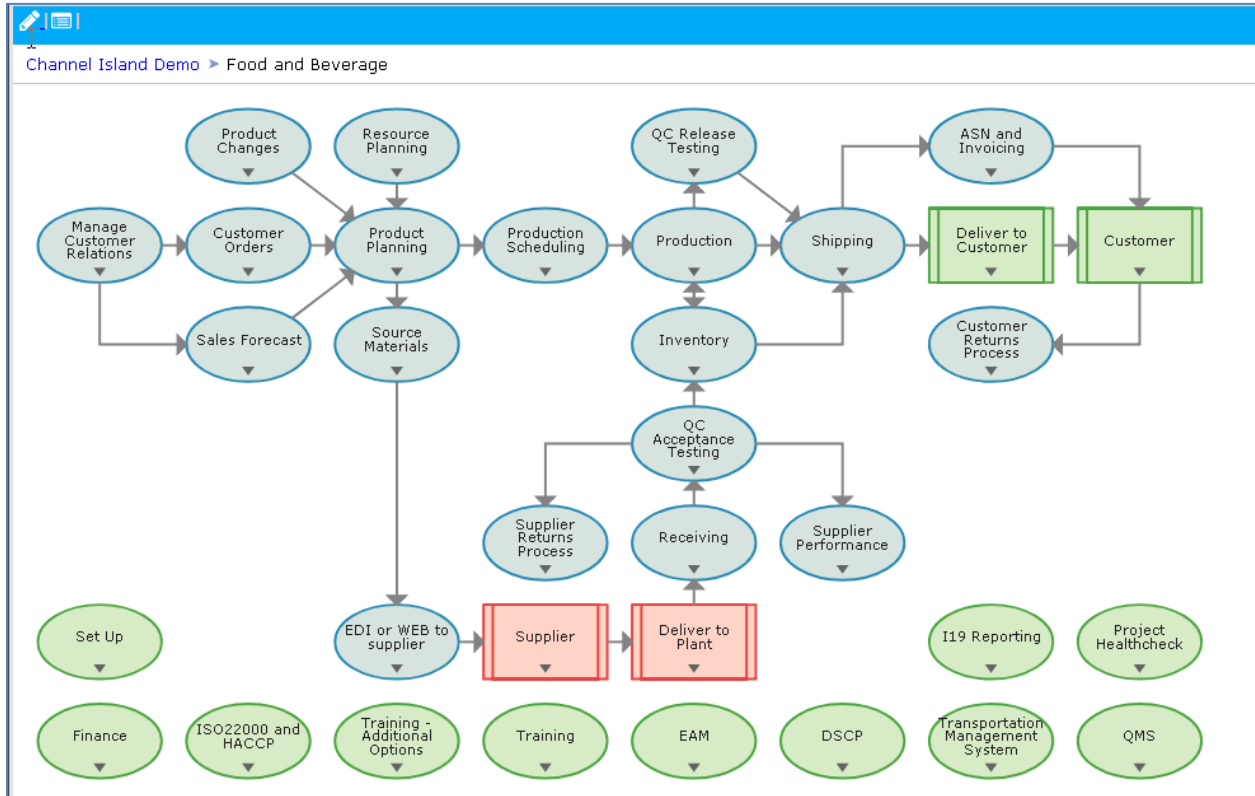
They can see an overview of the flow and access functions directly from QAD's signature process maps. Not only do these maps provide step-by-step guidance, they are based on industry "best practice" processes, tailored to your company's unique business.

## Demo

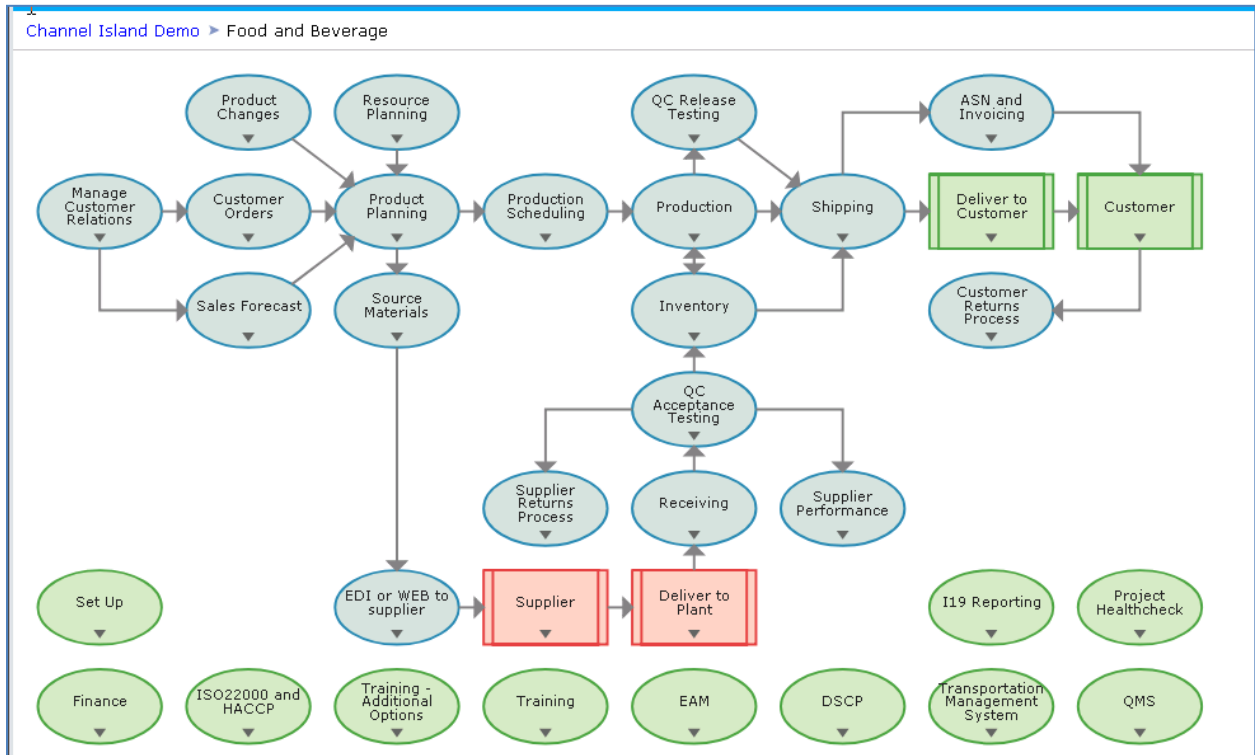
1. On Toolbar, click  Process Maps



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

The screenshot shows the QAD Sales Orders web interface. The browser address bar displays the URL: `https://vmlinux.qad.com:22011/qad-central/#/view/jr/view/hybridbrowse?viewMetalUri=urn:view:meta.com.qad.erp.sales.salesOrders`. The page title is "Sales Orders" and it includes a search bar with the text "Sales Order greater or equal to" and a "Search" button. The table below lists various sales orders with columns for Sales Order, Sold-To, Sort Name, Bill-To, Ship-To, Order Date, Due Date, Purchase Order, Salesperson, Currency, and Site. The table is currently displaying 10 records out of 203 total records.


Sales Order	Sold-To	Sort Name	Bill-To	Ship-To	Order Date	Due Date	Purchase Order	Salesperson	Currency	Site	Quote
10S10059	10C1002	Houston Automotiv...	10C1002B	10C1002	3/1/2019	3/2/2019		10SP01	USD	10-200	
AUTO1	12C1001	Cooper Automotive ...	12C1001	12C1001	5/10/2010	12/27/2018		12SP02	MXN	10-200	
AUTO2	22C1000	Auto-Plas Internatio...	22C1000	22C1000	5/10/2010			22SP01	GBP	10-200	
AUTO3	11C1002	CanCar Corporation	11C1002B	11C1002	7/12/2017			11SP01	CAD	10-200	
CS100021	21C1002	Van Hoes Foods Inte...	21C1002	21C1002	7/27/2010	12/27/2018		21SP01	EUR	10-400	
csbws1	11C1002	CanCar Corporation	11C1002B	11C1002	4/13/2011			11SP01	CAD	10-202	
csbws2	12C1001	Cooper Automotive ...	12C1001	12C1001	4/13/2011			12SP02	MXN	10-202	
csbws3	21C1000	NSC Automatisering...	21C1000	21C1000	4/13/2011			21SP01	EUR	10-202	
SO021901	10C1000	LTZ Retail	10C1000	10C1000A	8/9/2018	2/25/2019		10SP01	USD	10-400	
SO021902	10C1000	LTZ Retail	10C1000	10C1000C	8/9/2018	2/25/2019		10SP01	USD	10-400	
SO021903	10C1000	LTZ Retail	10C1000	10C1000D	8/9/2018	2/25/2019		10SP01	USD	10-400	
SO021904	30C1001	Medical Products Co...	30C1001	30C1001	8/9/2018	2/25/2019		30SP02	CNY	10-100	
SO021905	30C1001	Medical Products Co...	30C1001	30C1001	8/9/2018	2/25/2019		30SP02	CNY	10-100	

#### 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.

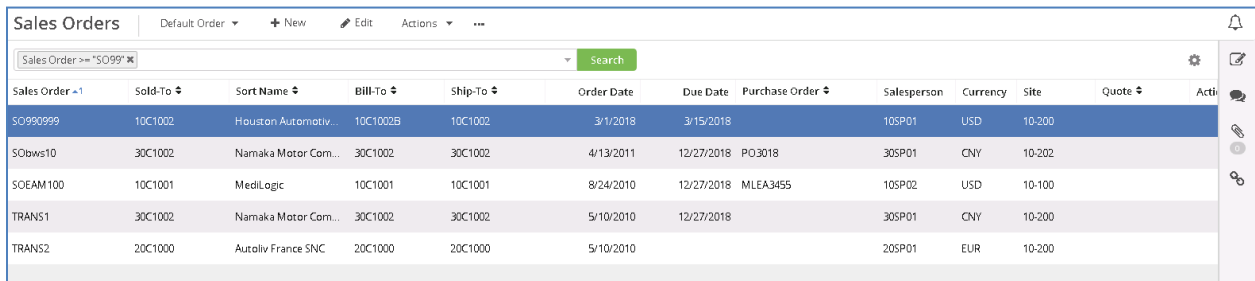
The system also supports contextual search ... simply type the characters you are searching for and the system highlights lines with this value.

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**



Sales Order	Sold-To	Sort Name	Bill-To	Ship-To	Order Date	Due Date	Purchase Order	Salesperson	Currency	Site	Quote	Acti
SO990999	10C1002	Houston Automotiv...	10C1002B	10C1002	3/1/2018	3/15/2018		10SP01	USD	10-200		
SObsw10	30C1002	Namaka Motor Com...	30C1002	30C1002	4/13/2011	12/27/2018	PO3018	30SP01	CNY	10-202		
SOEAM100	10C1001	MediLogic	10C1001	10C1001	8/24/2010	12/27/2018	MLEA3455	10SP02	USD	10-100		
TRANS1	30C1002	Namaka Motor Com...	30C1002	30C1002	5/10/2010	12/27/2018		30SP01	CNY	10-200		
TRANS2	20C1000	Autoliv France SNC	20C1000	20C1000	5/10/2010			20SP01	EUR	10-200		

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



Sales Order greater or equal to

My Searches Clear all

Site equals 10-400

Action Status is not null

Search Cancel

6. Click **Search**

Sales Orders Default Order + New Edit Actions ...

Site = "10-400" Action Status is not null Search

Sales Order	Sold-To	Sort Name	Bill-To	Ship-To	Order Date	Due Date	Purchase Order	Salesperson	Currency	Site	Quote	Acti
SO031191	31C1003	Sanitarium Health Fo...	31C1003	31C1003	1/9/2019	1/9/2019		10SP01	AUD	10-400		HD
SO041191	31C1003	Sanitarium Health Fo...	31C1003	31C1003	2/19/2019	2/19/2019		10SP01	AUD	10-400		HD

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

Site = "10-400" Action Status is not null Clear all

My Searches Save Save As Rename Delete

Site equals 10-400

Action Status is not null

Search Cancel

8. Click **Save As**

9. Enter name **Orders on Hold at site 10-400**

Save Stored Search ×

Name

Orders on Hold at site 10-400

Save Cancel

10. Click **Save**

11. In Save As, click drop-down



My Searches ▾

Orders on Hold at site 10-400

Save

Save As

Rename

Delete

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

13. Click **Search**

Sales Orders | Default Order ▾ + New ✎ Edit Actions ▾ ...

Site = "10-400" ✕ Search

Sales Order #	Sold-To	Sort Name	Bill-To	Ship-To	Order Date	Due Date	Purchase Order	Salesperson	Currency	Site	Quote	Ac
CS100021	21C1002	Van Hess Foods Inte...	21C1002	21C1002	7/27/2010	12/27/2018		215P01	EUR	10-400		
SO021901	10C1000	LTZ Retail	10C1000	10C1000A	8/9/2018	2/25/2019		105P01	USD	10-400		
SO021902	10C1000	LTZ Retail	10C1000	10C1000C	8/9/2018	2/25/2019		105P01	USD	10-400		
SO021903	10C1000	LTZ Retail	10C1000	10C1000D	8/9/2018	2/25/2019		105P01	USD	10-400		
SO021908	10C1004	Price Chopper	10C1004	10C1004	8/9/2018	2/25/2019		105P02	USD	10-400		
SO021909	11C1001	Chiro Foods limited	11C1001	11C1001	8/9/2018	2/25/2019		115P02	CAD	10-400		
SO021924	30C1003	Nantong Foods	30C1003	30C1003	8/9/2018	2/25/2019		305P02	CNY	10-400		
SO021925	31C1001	Sanitarium Health Fo...	31C1001	31C1001	8/9/2018	2/25/2019		315P02	AUD	10-400		
SO021926	31C1002	Woolworths Ltd	31C1002	31C1002	8/9/2018	2/25/2019		315P01	AUD	10-400		
SO021931	40C1001	Bebidas da Amazoni...	40C1001	40C1001	8/9/2018	2/25/2019		405P02	BRL	10-400		
SO021932	40C1002	Genese Produtos Far...	40C1002	40C1002	8/9/2018	2/25/2019		405P01	BRL	10-400		
SO031191	31C1003	Sanitarium Health Fo...	31C1003	31C1003	1/9/2019	1/9/2019		105P01	AUD	10-400		HC
SO031901	10C1000	LTZ Retail	10C1000	10C1000A	8/29/2018	3/24/2019		105P01	USD	10-400		

100 Records per page 1 - 57 of 57

14. Click **CTRL + F**

15. Enter **1**

QAD Favorites ▾ Purchase Orders My Sales Activities ▾ 1 4/1,065

Sales Orders | Default Order ▾ + New ✎ Edit Actions ▾ ...

Site = "10-400" ✕ Search

ite	Quote	Action Status	Consignment	Scheduled	Language	Channel	Trailer 1	Trailer Amt 1	Trailer 2	Trailer Amt 2	Trailer 3	Trailer Amt 3	Fully Invoiced	Co
3-400			No	Yes	us		20	0.00	30	0.00	30	0.00	No	Yes
3-400			No	No	us	WHSL	20	0.00	11	0.00	30	0.00	No	Yes
3-400			No	No	us	WHSL	20	0.00	11	0.00	30	0.00	No	Yes
3-400			No	No	us	WHSL	20	0.00	11	0.00	30	0.00	No	Yes
3-400			No	No	us	WHSL	20	0.00	11	0.00	30	0.00	No	Yes

16. ... then **0**



Sales Order #	Sold-To	Sort Name	Bill-To	Ship-To	Order Date	Due Date	Purchase Order	Salesperson	Currency	Site	Quote	Ac
CS100021	21C1002	Van Hoes Foods Inte...	21C1002	21C1002	7/27/2010	12/27/2018		21SP01	EUR	10-400		
SO021901	10C1000	LTZ Retail	10C1000	10C1000A	8/9/2018	2/25/2019		10SP01	USD	10-400		
SO021902	10C1000	LTZ Retail	10C1000	10C1000C	8/9/2018	2/25/2019		10SP01	USD	10-400		
SO021903	10C1000	LTZ Retail	10C1000	10C1000D	8/9/2018	2/25/2019		10SP01	USD	10-400		
SO021908	10C1004	Price Chopper	10C1004	10C1004	8/9/2018	2/25/2019		10SP02	USD	10-400		
SO021909	11C1001	Chiro Foods limited	11C1001	11C1001	8/9/2018	2/25/2019		11SP02	CAD	10-400		

17. ... then 00A

Sales Order #	Sold-To	Sort Name	Bill-To	Ship-To	Order Date	Due Date	Purchase Order	Salesperson	Currency	Site	Quote	Ac
CS100021	21C1002	Van Hoes Foods Inte...	21C1002	21C1002	7/27/2010	12/27/2018		21SP01	EUR	10-400		
SO021901	10C1000	LTZ Retail	10C1000	10C1000A	8/9/2018	2/25/2019		10SP01	USD	10-400		
SO021902	10C1000	LTZ Retail	10C1000	10C1000C	8/9/2018	2/25/2019		10SP01	USD	10-400		

18. Close search box

19. Click Sales Order to sort

Note this changed the sort from ascending to descending

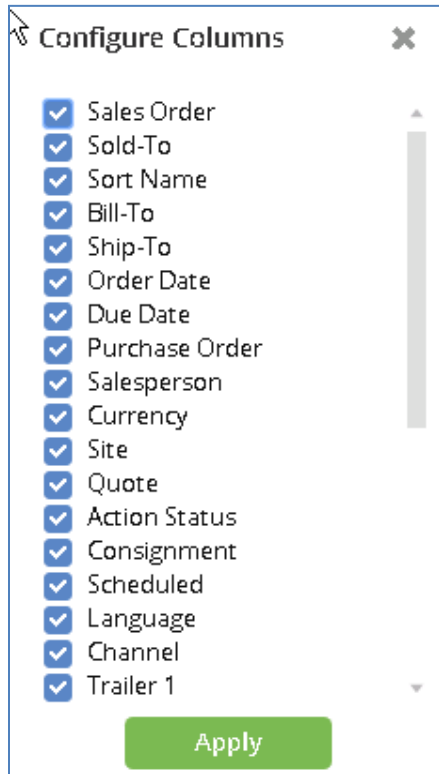
Sales Order #	Sold-To	Sort Name	Bill-To	Ship-To	Order Date	Due Date	Purchase Order	Salesperson	Currency	Site	Quote	Ac
SO071932	40C1002	Genese Produtos Far...	40C1002	40C1002	1/10/2019	7/24/2019		40SP01	BRL	10-400		
SO071931	40C1001	Bebidas da Amazoni...	40C1001	40C1001	1/10/2019	7/24/2019		40SP02	BRL	10-400		
SO071926	31C1002	Woolworths Ltd	31C1002	31C1002	1/10/2019	7/24/2019		31SP01	AUD	10-400		
SO071925	31C1001	Sanitarium Health Fo...	31C1001	31C1001	1/10/2019	7/24/2019		31SP02	AUD	10-400		
SO071924	30C1003	Nantong Foods	30C1003	30C1003	1/10/2019	7/24/2019		30SP02	CNY	10-400		

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

21. Resize Sort Name column

Sales Order #	Sort Name	Bill-To	Sold-To	Ship-To	Order Date	Due Date	Purchase Order	Salesperson	Currency	Site
SO071932	Genese Produtos Farmaceutico	40C1002	40C1002	40C1002	1/10/2019	7/24/2019		40SP01	BRL	10-400
SO071931	Bebidas da Amazonia Ltda	40C1001	40C1001	40C1001	1/10/2019	7/24/2019		40SP02	BRL	10-400
SO071926	Woolworths Ltd	31C1002	31C1002	31C1002	1/10/2019	7/24/2019		31SP01	AUD	10-400
SO071925	Sanitarium Health Food Co.	31C1001	31C1001	31C1001	1/10/2019	7/24/2019		31SP02	AUD	10-400
SO071924	Nantong Foods	30C1003	30C1003	30C1003	1/10/2019	7/24/2019		30SP02	CNY	10-400

22. Click Settings icon



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



### Configure Columns ✕

- Sales Order
- Sold-To
- Sort Name
- Bill-To
- Ship-To
- Order Date
- Due Date
- Purchase Order
- Salesperson
- Currency
- Site
- Quote
- Action Status
- Consignment
- Scheduled
- Language
- Channel
- Trailer 1

Apply

24. Click **Apply**

Sales Order	Sort Name	Sold-To	Ship-To	Due Date	Purchase Order	Currency	Site	Action Status	Channel	Trailer 1	Tr
SO071932	Genese Produtos Farmaceutico	40C1002	40C1002	7/24/2019		BRL	10-400		WHSL	20	
SO071931	Bebidas da Amazonia Ltda	40C1001	40C1001	7/24/2019		BRL	10-400		ENDU	20	
SO071926	Woolworths Ltd	31C1002	31C1002	7/24/2019		AUD	10-400		WHSL	20	
SO071925	Sanitarium Health Food Co.	31C1001	31C1001	7/24/2019		AUD	10-400		WHSL	20	
SO071924	Nestle Food	30C1002	30C1002	7/24/2019		CHF	10-400		WHSL	20	

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

**Sales Orders**
Default Order ▾

Sales Order ▾1	My Views
	Role Views
	System Views
SO071932	Default Order
SO071931	Default View
SO071926	Quick Order
SO071925	Save
SO071924	Save As
	Rename
	Delete

26. Select **Save As**



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

Save Stored View As ✕

▼ **Main**

Name

Save For

Me

System Wide

Selected Roles

	Domain	Role
<input type="checkbox"/>	20FRA	webui_user
<input checked="" type="checkbox"/>	20FRA	SuperUser
<input type="checkbox"/>	20FRA	CustSvcRep
<input checked="" type="checkbox"/>	22UK	webui_user
<input type="checkbox"/>	22UK	SuperUser

▼ **Browse Load**

Group By

Records per page

28. Click **Save**

Note default view is now MY SO VIEW



Sales Order	Sort Name	Sold-To	Ship-To	Due Date	Purchase Order	Currency	Site	Action Status	Channel	Trailer 1	Tr
TRANS2	Autoliv France SNC	20C1000	20C1000			EUR	10-200			20	
TRANS1	Namaka Motor Company	30C1002	30C1002	12/27/2018		CNY	10-200			20	
SOEAM100	MediLogic	10C1001	10C1001	12/27/2018	MLEA3455	USD	10-100			20	

29. Click More icon

Sales Orders | MY SO VIEW | + New | Edit | Actions | **More**

- Favorite
- Design Layout
- Permissions
- Show Group By
- Export

30. Select **Export**

31. Enter File Name <temp>

Sales Orders > Export

### Export

**Search Criteria**

Criteria: No criteria selected

Records Returned: 203

**File Properties**

File Name:

Format for Later Import:

File Type: Excel (.xlsx)

32. Click **Export**



**QAD**

### Export: temp

Started on 3/11/2019 3:19 PM ( GMT -07:00 )  
Completed on 3/11/2019 3:19 PM ( GMT -07:00 )

If download does not start automatically click here:

[Download](#)

### 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	Tesdale 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



Sales Orders | MY SO VIEW ▾ + New Edit Actions ▾

Sales Order greater or equal to

Sales Order ▾1	Sort Name ⇅	Sold-To ⇅
TRANS2	Autoliv France SNC	20C1000
TRANS1	Namaka Motor Company	30C1002

- Favorite ★
- Design Layout
- Permissions
- Show Group By
- Export

35. Select **Show Group By**

Drag a column header here to group by that column

Sales Order ▾1	Sort Name ⇅	Sold-To ⇅	Ship-To ⇅	Due Date	Purchase Order ⇅	Currency	Site	Action Status	Channel	Trailer 1	Tr
TRANS2	Autoliv France SNC	20C1000	20C1000			EUR	10-200			20	
TRANS1	Namaka Motor Company	30C1002	30C1002	12/27/2018		CNY	10-200			20	
SOEAM100	MediLogic	10C1001	10C1001	12/27/2018	MLEA3455	USD	10-100			20	
SObws10	Namaka Motor Company	30C1002	30C1002	12/27/2018	PO3018	CNY	10-202			11	

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

37. Expand first Ship-To

Ship-To X

Sales Order ▾1	Sort Name ⇅	Sold-To ⇅	Ship-To ⇅	Due Date	Purchase Order ⇅	Currency	Site	Action Status	Channel	Trailer 1
Ship-To: 10C1000A (6)										
SO071901	LTZ Retail	10C1000	10C1000A	7/24/2019		USD	10-300		WHSL	21
SO061901	LTZ Retail	10C1000	10C1000A	6/25/2019		USD	10-300		WHSL	21
SO051901	LTZ Retail	10C1000	10C1000A	5/24/2019		USD	10-400		WHSL	21
SO041901	LTZ Retail	10C1000	10C1000A	4/25/2019		USD	10-400		WHSL	21
SO031901	LTZ Retail	10C1000	10C1000A	3/24/2019		USD	10-400		WHSL	21
SO021901	LTZ Retail	10C1000	10C1000A	2/25/2019		USD	10-400		WHSL	21
Ship-To: 10C1000C (6)										
Ship-To: 10C1000D (6)										
Ship-To: 10C1001 (8)										
Ship-To: 10C1002 (8)										

38. Click More icon



**Sales Orders** | MY SO VIEW ▾ | + New | Edit | Actions ▾ | ⋮

Sales Order greater or equal to

▲ Ship-To ✕

Sales Order ▾1	Sort Name ⇅	Sold-To ⇅
▼ Ship-To: 10C1000A (6)		
SO071901	LTZ Retail	10C1000

- Favorite ★
- Design Layout
- Permissions
- Remove Group By
- Expand Groups
- Collapse Groups
- Export

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 are 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.

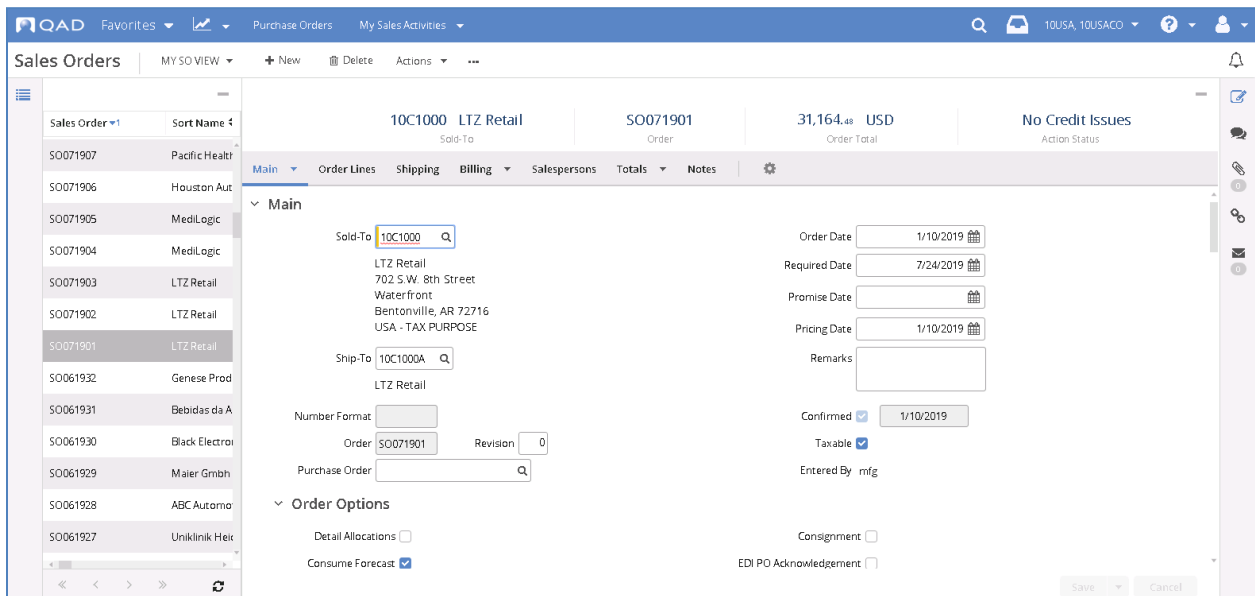
The middle section is the Form with data fields organized on to separate panels – Main, Order Lines, Billing, Shipping, etc.

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



Main ▾ Order Lines Shipping Billing ▾ Salespersons Totals ▾ Notes ⚙

Order Lines

+ New Edit Delete Details More ▾

Line	Item	Description	Qty Ordered	Line UM	Required Date	Confirmed	List Price
1	03021	Pump/Refill, Unscented	100.0	EA	7/24/2019	Yes	
2	03022	2-5l Bottles, Unscented	100.0	EA	7/24/2019	Yes	
3	03023	4-5l Bottles, Unscented	100.0	EA	7/24/2019	Yes	
4	03033	4-5l Bottles, Scented	100.0	EA	7/24/2019	Yes	
5	03090	25 gallon Disinfectant	100.0	EA	7/24/2019	Yes	
6	04001	Fruit Juice	100.0	EA	7/24/2019	Yes	

1 - 6 of 6

4. Click **Billing** panel

Main ▾ Order Lines Shipping **Billing** ▾ Salespersons Totals ▾ Notes ⚙

Billing

Bill-To: 10C1000 Q  
LTZ Retail  
702 S.W. 8th Street  
Waterfront  
Bentonville, AR 72716  
USA - TAX PURPOSE

Discount % 10.00  
Manual Price List Q  
Reprice/Edit   
Fixed Price   
Line Pricing   
EDI Invoice

Currency USD  
Daybook Set 10-SALES Q  
Channel WHSL Q  
Project Q

Credit

Credit Terms 30D Q 30 days after invoice date  
Reviewed   
Credit Terms Interest % 0.00  
CR Initials Q  
Action Status Q No Credit Issues  
Credit Card Q

Save Cancel

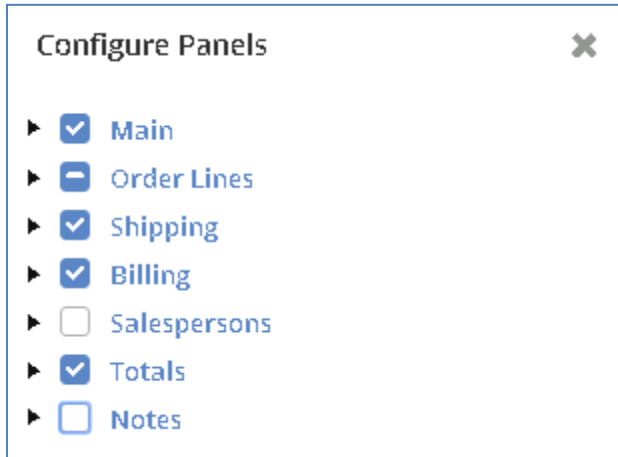
5. Click Settings ⚙ icon

Configure Panels X

- ▶  Main
- ▶  Order Lines
- ▶  Shipping
- ▶  Billing
- ▶  Salespersons
- ▶  Totals
- ▶  Notes



6. Uncheck **Salespersons, Notes**

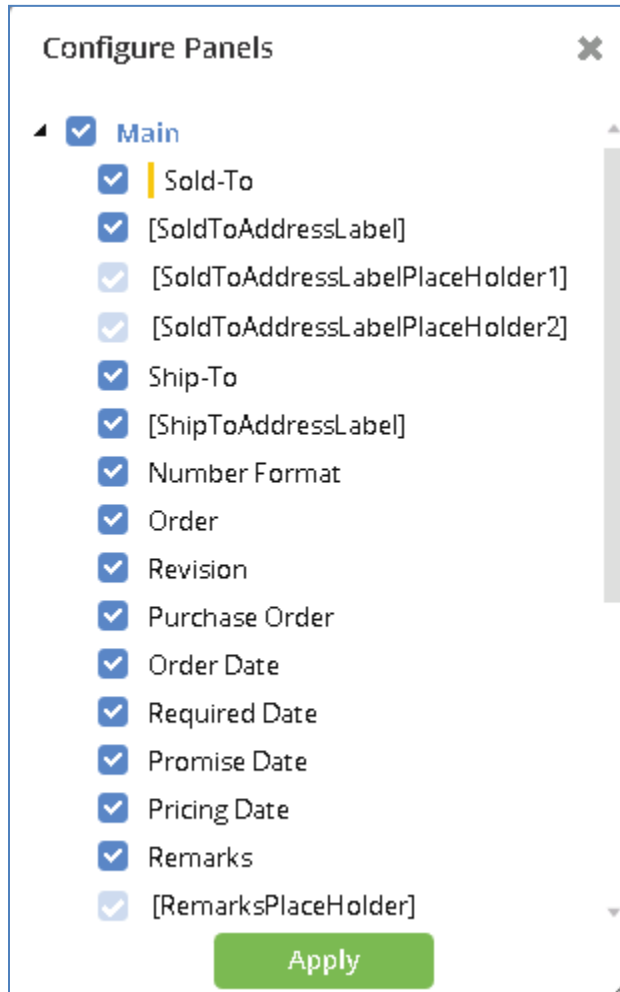


7. Click **Apply**



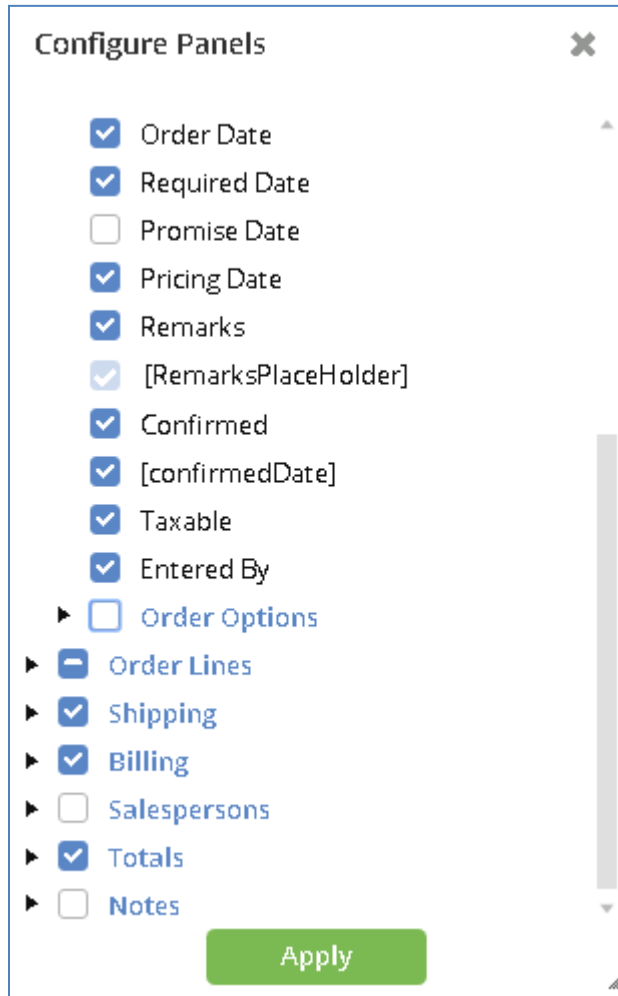
8. Click Settings  icon

9. Expand **Main**



10. Uncheck **Promise Date**

11. Uncheck **Order Options**



12. Click **Apply**

13. Select **Main** panel



Main Order Lines Shipping Billing Totals

▼ Main

Sold-To: 10C1000  
LTZ Retail  
702 S.W. 8th Street  
Waterfront  
Bentonville, AR 72716  
USA - TAX PURPOSE

Ship-To: 10C1000A  
LTZ Retail

Number Format:

Order: SO071901 Revision: 0

Purchase Order:

Order Date: 1/10/2019  
Required Date: 7/24/2019  
Pricing Date: 1/10/2019

Remarks:

Confirmed:  1/10/2019  
Taxable:   
Entered By: mfg

▼ Order Lines

+ New Edit Delete Details More

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



### Save Stored View As

▼ **Main**

Name

Save For

Me

System Wide

Selected Roles

	Domain	Role
<input type="checkbox"/>	20FRA	webui_user
<input type="checkbox"/>	20FRA	SuperUser
<input type="checkbox"/>	20FRA	CustSvcRep
<input type="checkbox"/>	22UK	webui_user
<input type="checkbox"/>	22UK	SuperUser

▼ **Browse Load**

Group By

Records per page

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



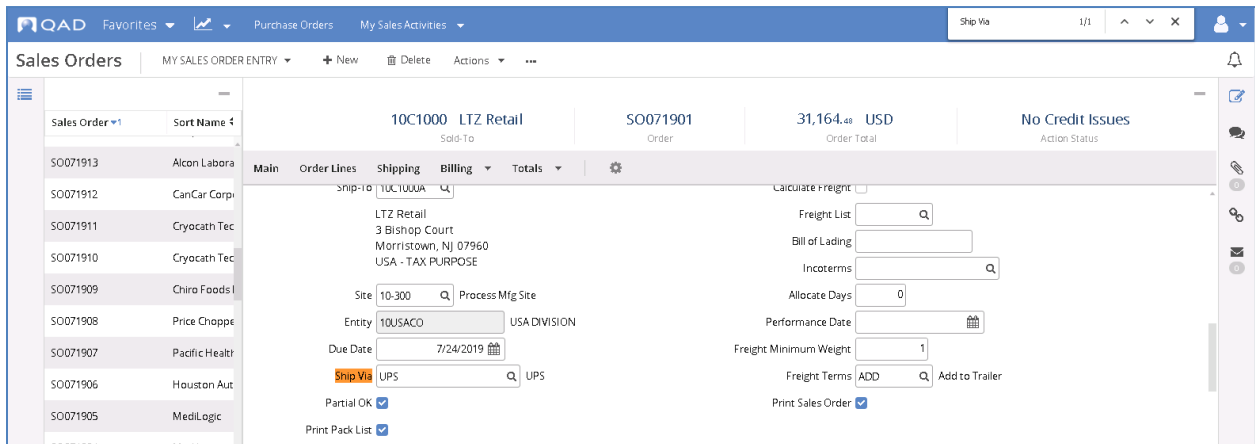
### Fast Data Entry

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.

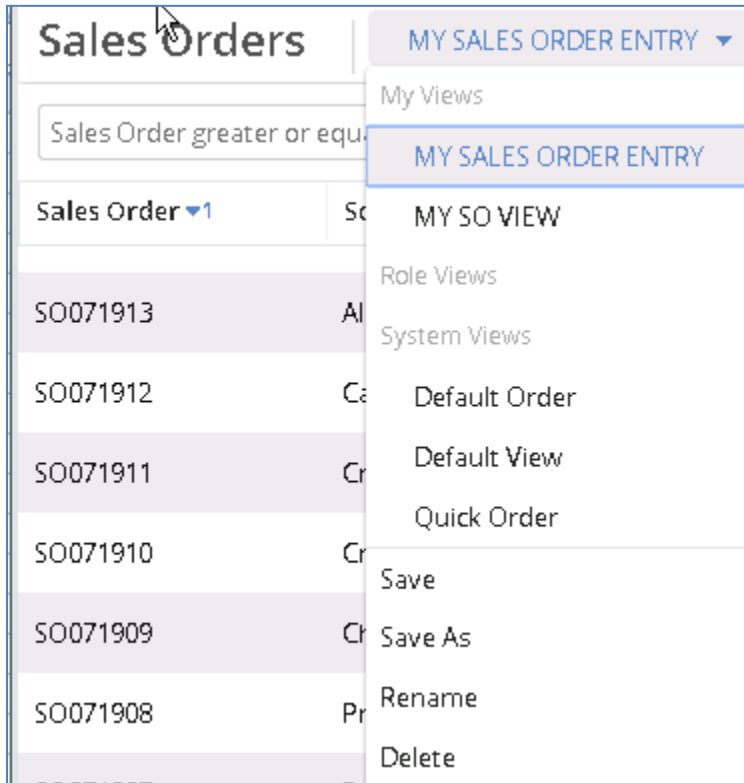
### Demo

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

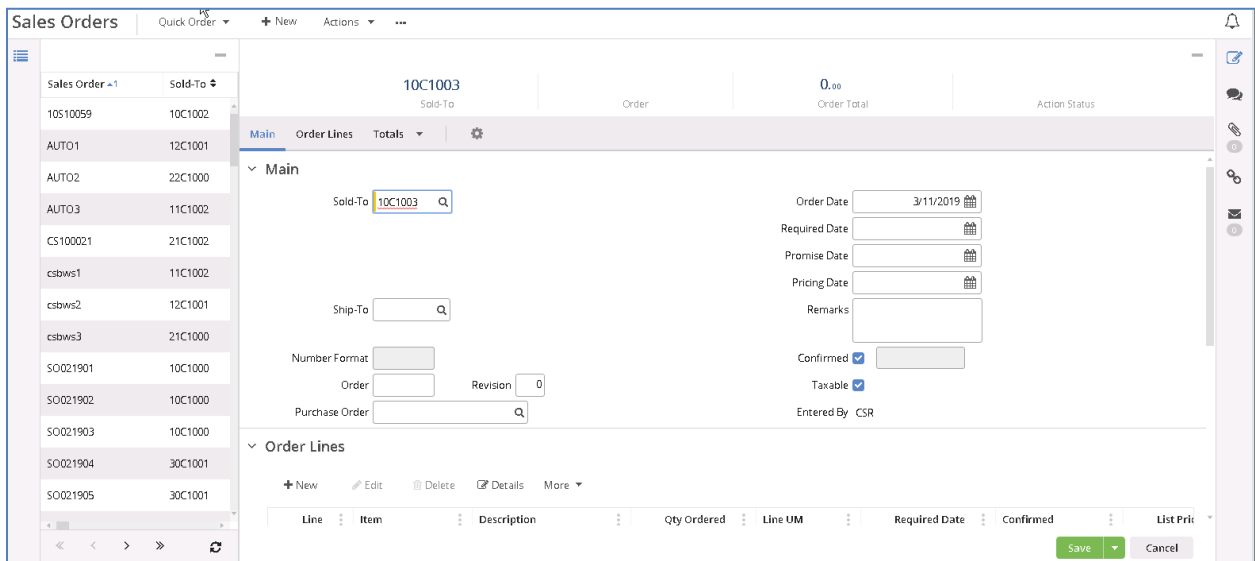


3. Close search
4. Close form
5. In **MY SALES ORDER ENTRY**, click drop-down

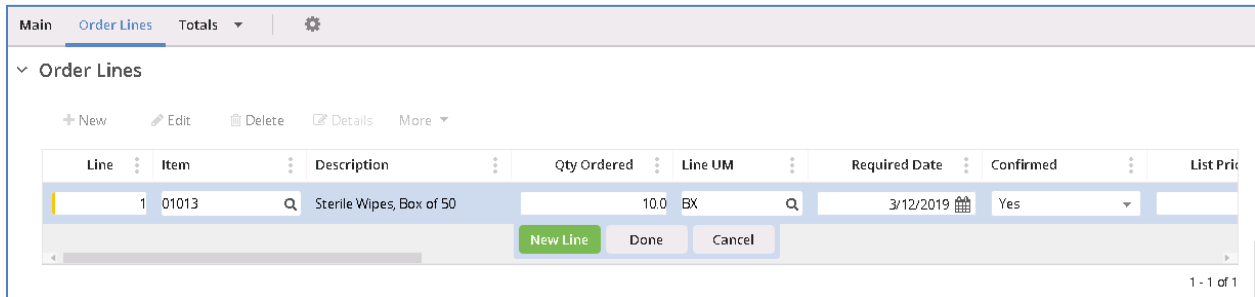
Note My Views, Role Views and System Views



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

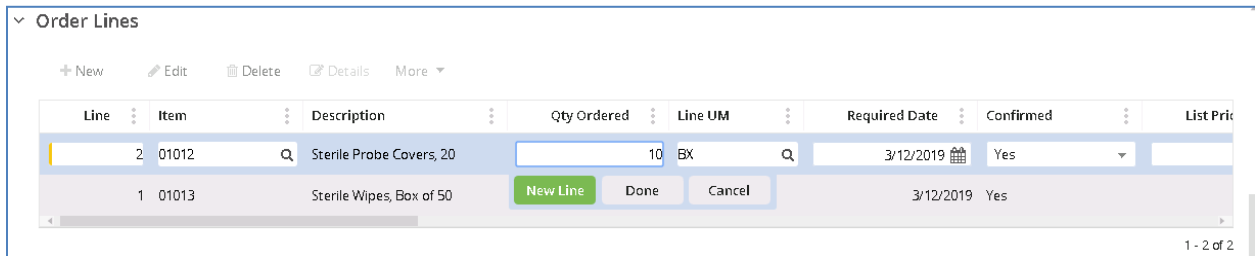


9. In Order Lines, Click **+New**
10. Enter Item **01013**, Qty **10**, Discount **55%**



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

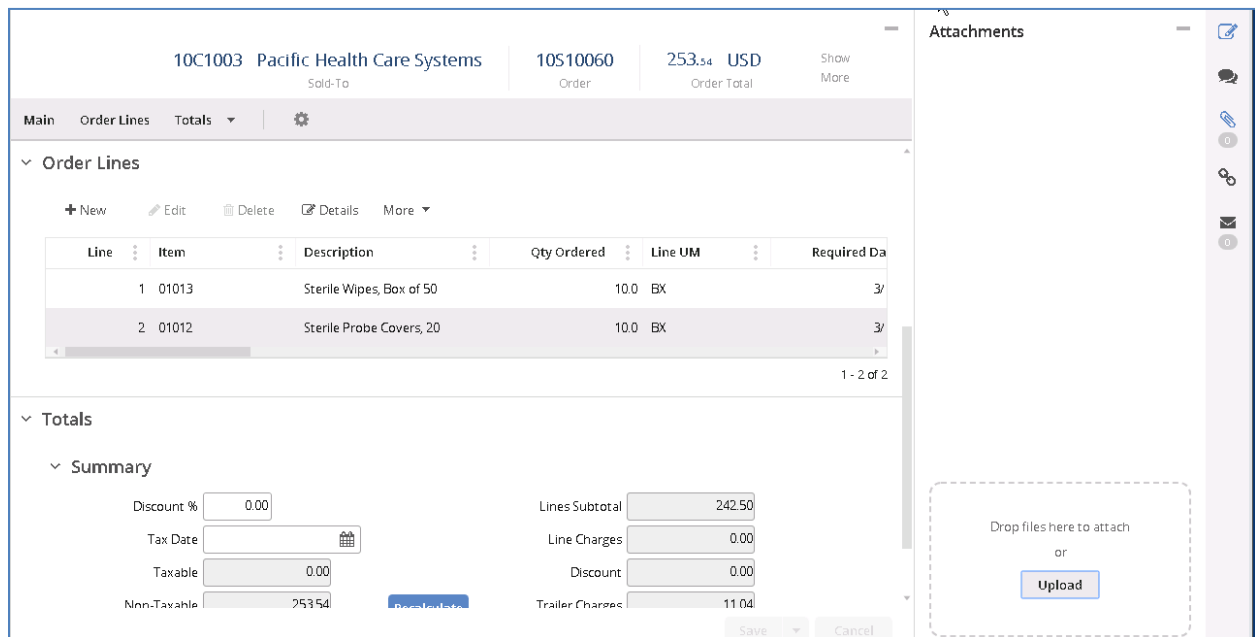
Anywhere in the system you will see that you have the option to attach related documents, and where applicable, set these up so that they follow the item through the subsequent workflow.

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



The screenshot shows a web application interface for an order. The main area displays order details for 'Pacific Health Care Systems' with order number 10510060 and a total of 253.54 USD. Below this is a table of order lines:

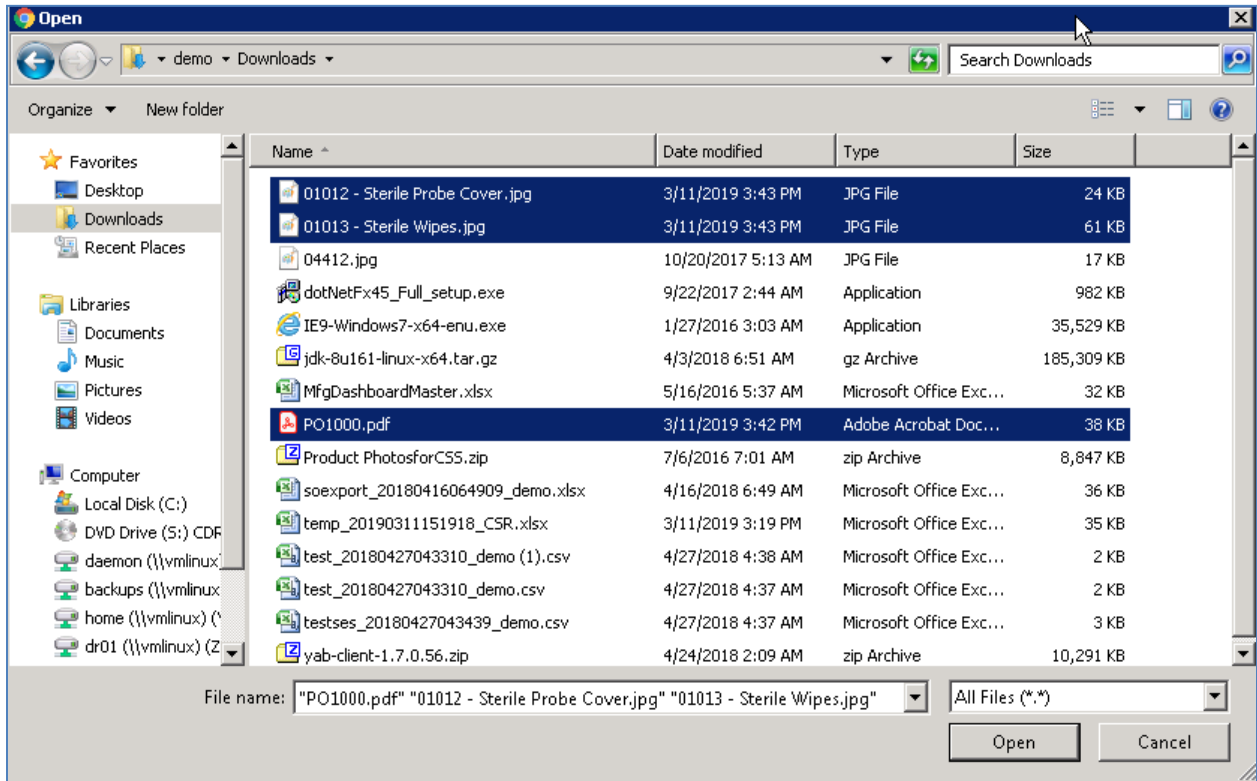
Line	Item	Description	Qty Ordered	Line UM	Required Da
1	01013	Sterile Wipes, Box of 50	10.0	BX	3/
2	01012	Sterile Probe Covers, 20	10.0	BX	3/

Below the table is a 'Totals' section with a 'Summary' table:

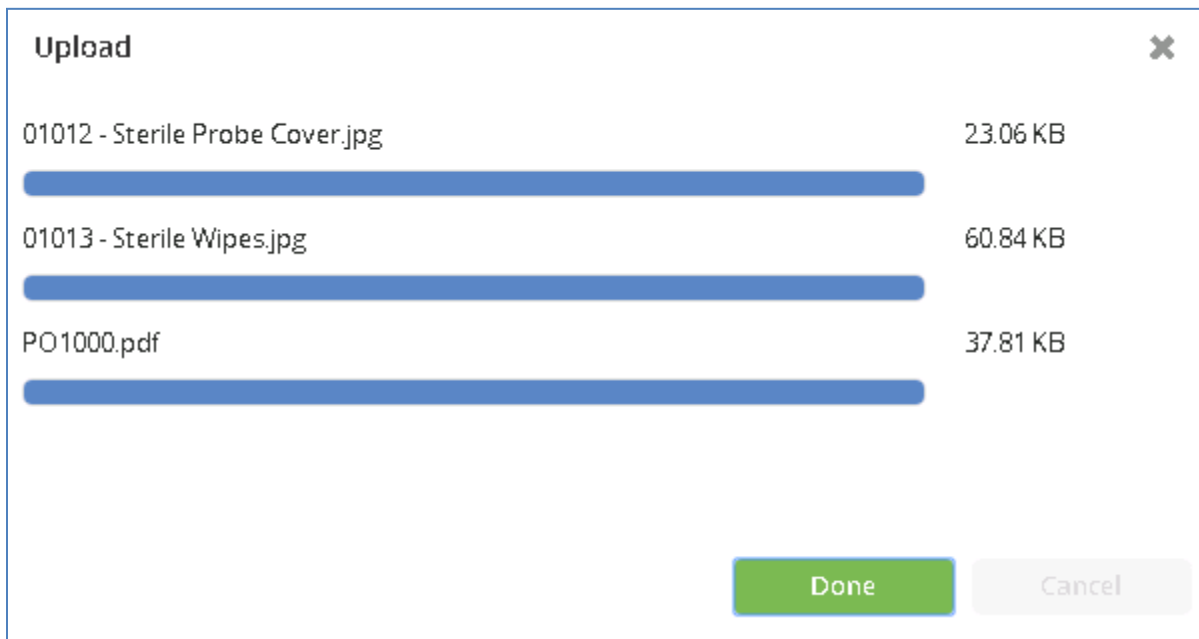
Discount %	0.00	Lines Subtotal	242.50
Tax Date		Line Charges	0.00
Taxable	0.00	Discount	0.00
Non-Taxable	253.54	Trailer Charges	11.04

On the right side, there is an 'Attachments' panel with a dashed box containing the text 'Drop files here to attach or Upload' and an 'Upload' button. A vertical toolbar on the far right contains icons for chat, attachments, and other functions.

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



4. Click **Open**



5. Click **Done**



**Attachments**

- 01012 - Sterile Probe Cover.jpg  
Modified By CSR.3/11/2019 3:44 PM
- 01013 - Sterile Wipes.jpg  
Modified By CSR.3/11/2019 3:44 PM
- PO1000.pdf  
Modified By CSR.3/11/2019 3:44 PM

- In any document, click
- Select Properties

Note Keep with Workflow option

**Attachment Properties**

Main

Display Name

File Name 01012 - Sterile Probe Cover.jpg

Description

Owner CSR

Last Author CSR

Last Modified Date 3/11/2019 3:44 PM

Size 23.06 KB

Workflow

Keep with Workflow

Primary Thumbnail

Use as Primary Thumbnail

Done Cancel

**Key Points**

- One or more attachments
- Option to keep with workflow



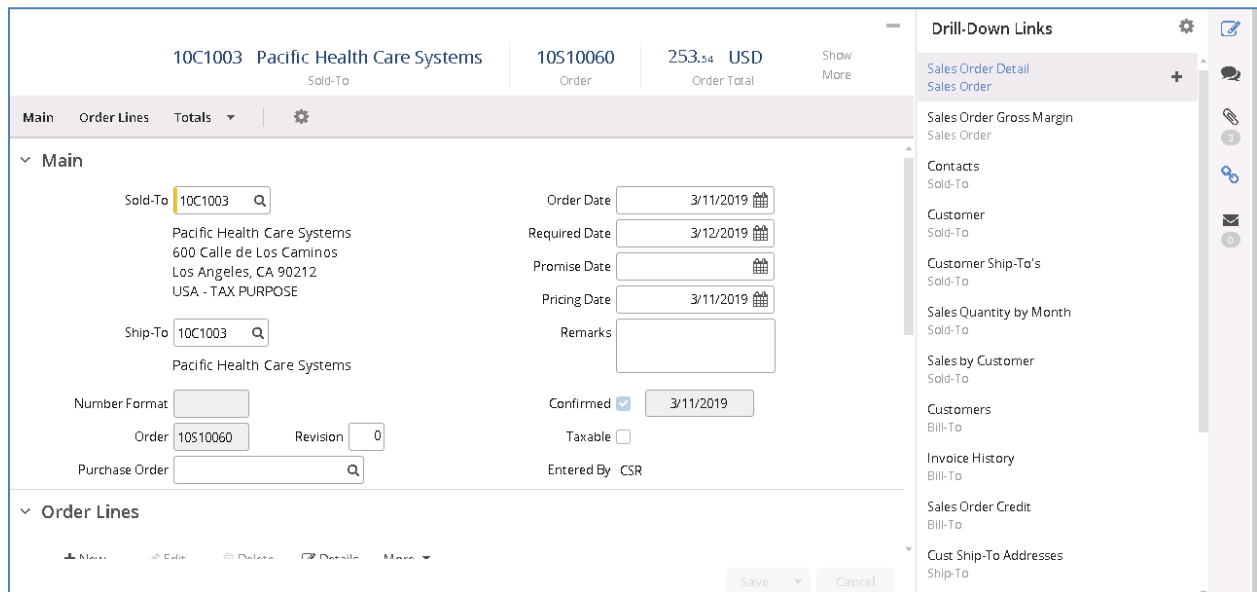
### Context-Sensitive Links and Actions

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

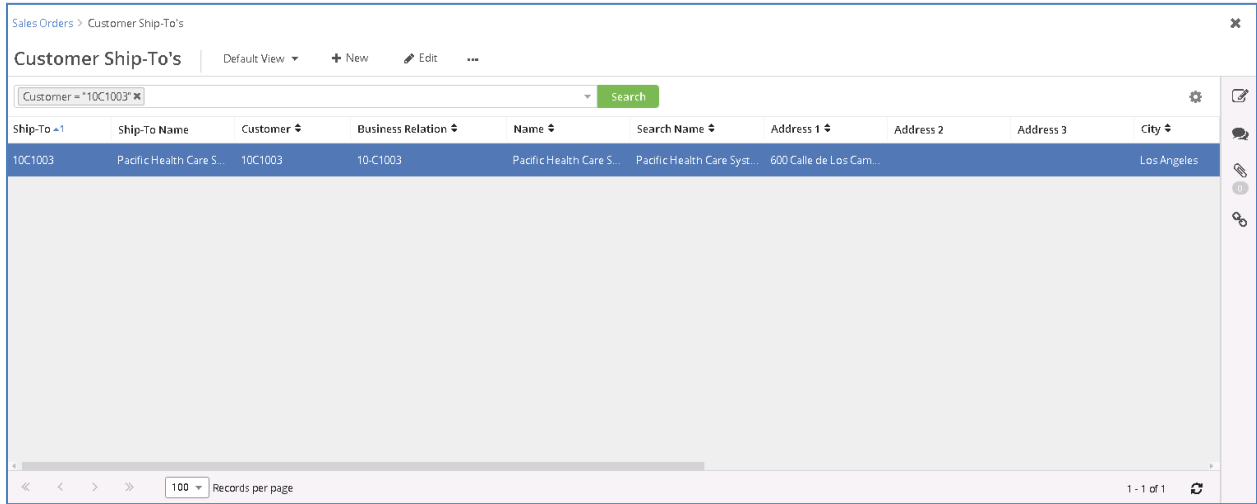


2. Hover over Customer Ship-To's

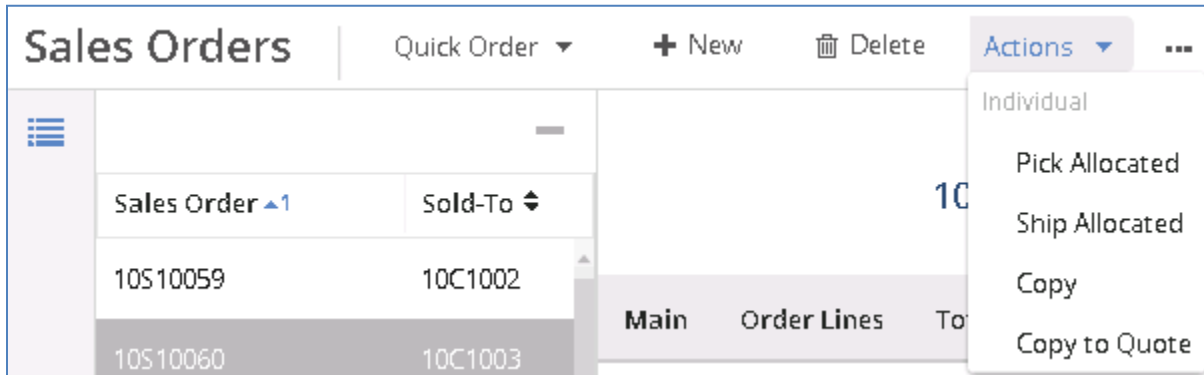
Note + icon to add new ship-to

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!

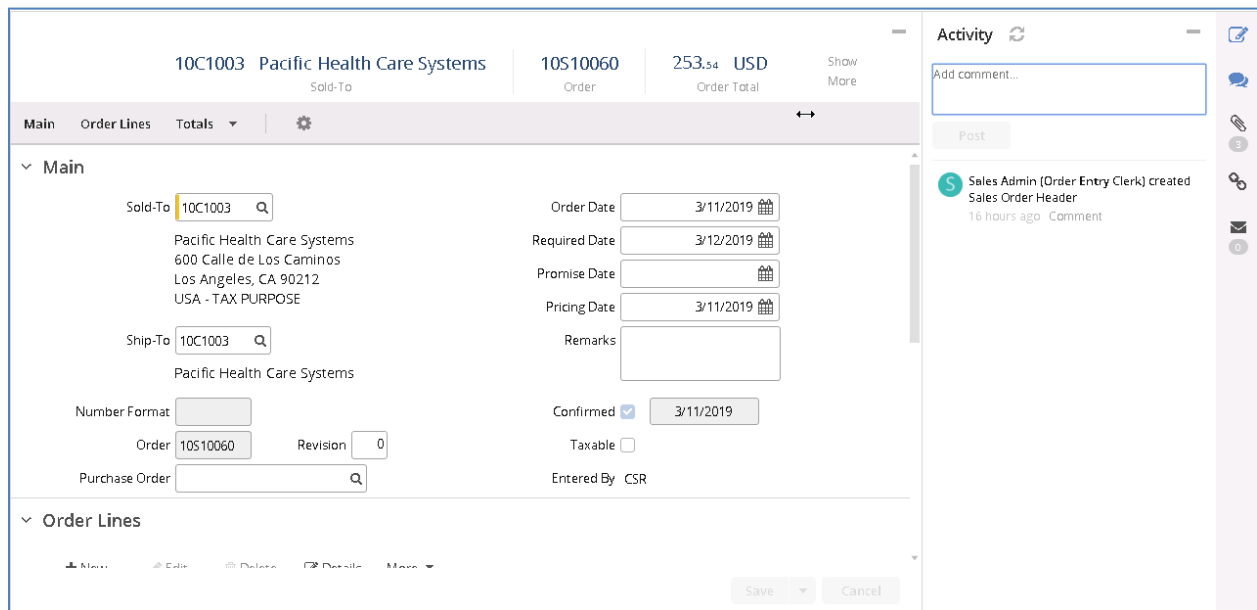
Communication can go back and forth, between any number of users. Each message has a direct link to the original sales order so the user can review the information and, subject to security, make any changes. They may even send a note to someone else.

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





The screenshot displays a sales order form for 'Pacific Health Care Systems' with order number 10S10060 and a total of 253.54 USD. The form includes fields for Sold-To, Ship-To, Order Date, Required Date, Promise Date, Pricing Date, Remarks, Confirmed status, Taxable status, and Entered By (CSR). An 'Activity' panel on the right shows a recent comment: 'Sales Admin (Order Entry Clerk) created Sales Order Header 16 hours ago Comment'. The interface includes navigation tabs (Main, Order Lines, Totals), a settings gear, and a bottom toolbar with 'Save' and 'Cancel' buttons.

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




Activity  


3. Click **Post**

Activity  

---

 Sales Admin (Order Entry Clerk)  
@Sales Manager Do you approve this discount?  
a few seconds ago [Comment](#)

---

 Sales Admin (Order Entry Clerk) created Sales Order Header  
16 hours ago [Comment](#)

4. Launch another Web UI session

5. Enter Username [MgrSales@qad.com](mailto:MgrSales@qad.com), Password **qad**



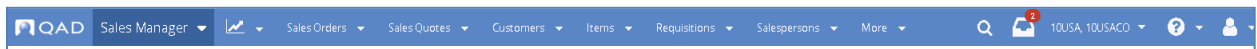
Sign in to QAD Cloud Live

Username  
**MgrSales@qad.com**

Password  
...

**Sign In**

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)

**Inbox**  

Tasks (0)	Notifications (2)
	<p> <b>Sales Order Header 10S10060</b> 3m Sales Admin (Order Entry Clerk) mentioned you in a comm... 10USA, 10USACO  Comment</p>
	<p> <b>Sales Order Line 1 10S10060</b> 16h Please verify this sales order. The discount of 55.00 exceed... 10USA, 10USACO </p>

**View Inbox**



9. Click **View Inbox**

The screenshot shows an 'Inbox' interface. At the top, there are tabs for 'Tasks (0)' and 'Notifications (1)'. Below this, a notification is displayed: 'Sales Order Header 10S10060' received at 7:54 AM on 3/12/2019. The notification text reads: 'Sales Admin (Order Entry Clerk) mentioned you in a comment: "@Sales Manager Do you approve this discount?".' The notification includes a profile picture of the sender and two buttons: 'Comment' and 'Archive'. Below the notification, there is a partial view of another notification: 'Sales Order Line 1 10S10060' with the text 'Please verify this sales order. The disco...'

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

The screenshot shows the 'Sales Orders' detail page for order 10S10060. The header includes the order number '10S10060' and the total amount '253.34 USD'. The 'Sold-To' information is for 'Pacific Health Care Systems' located at '600 Calle de Los Caminos, Los Angeles, CA 90212, USA - TAX PURPOSE'. The 'Ship-To' is also 'Pacific Health Care Systems'. The page includes tabs for 'Main', 'Order Lines', 'Shipping', 'Billing', 'Salespersons', 'Totals', and 'Notes'. On the right side, there is an 'Activity' feed with a text input field and a 'Post' button. The activity feed shows a comment from 'Sales Admin (Order Entry Clerk)' asking '@Sales Manager Do you approve this discount?' and another comment stating 'Sales Admin (Order Entry Clerk) created Sales Order Header'.

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

This is a close-up of the activity feed input field. The text '@[Demo Super User,demo@qad.com] What do you think?' is entered into the field. Below the input field is a green 'Post' button. A mouse cursor is visible over the input field.

12. Click **Post**



13. Launch another Web UI session

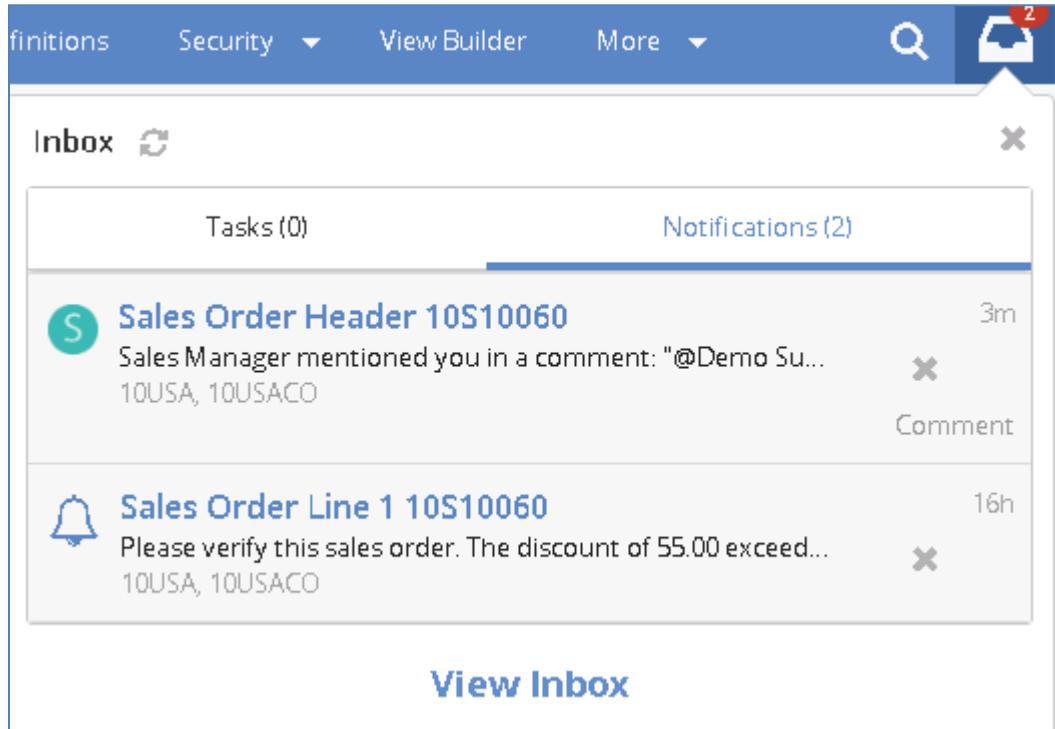
14. Enter Username [demo@qad.com](mailto:demo@qad.com), Password **qad**

15. Click **Sign In**



16. Click Inbox  icon

17. Click **Notifications**



Definitions Security View Builder More

Inbox

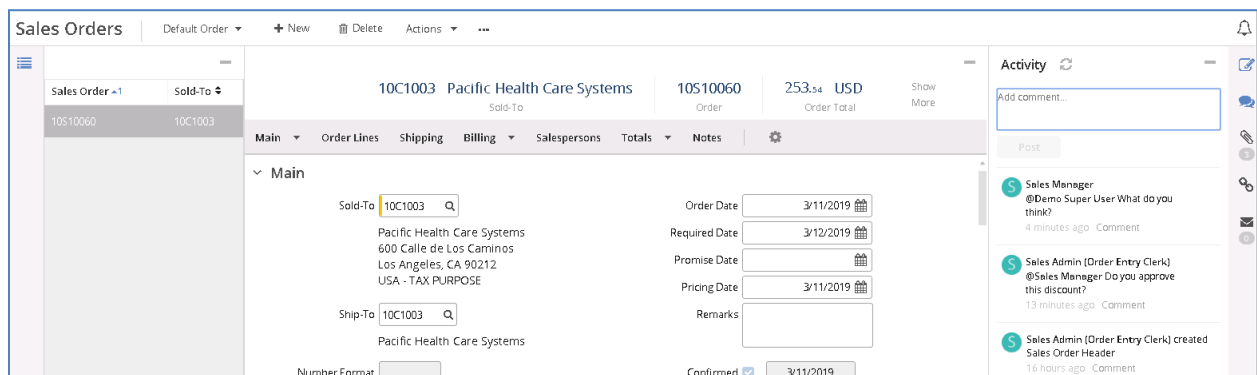
Tasks (0) Notifications (2)

**S Sales Order Header 10S10060** 3m  
Sales Manager mentioned you in a comment: "@Demo Su...  
10USA, 10USACO

**Bell Sales Order Line 1 10S10060** 16h  
Please verify this sales order. The discount of 55.00 exceed...  
10USA, 10USACO

[View Inbox](#)

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



Sales Orders Default Order + New Delete Actions

Sales Order -1 Sold-To

10S10060 10C1003

10C1003 Pacific Health Care Systems 10S10060 253.54 USD  
Sold-To Order Order Total

Main Order Lines Shipping Billing Salespersons Totals Notes

Main

Sold-To 10C1003 Pacific Health Care Systems  
600 Calle de Los Caminos  
Los Angeles, CA 90212  
USA - TAX PURPOSE

Ship-To 10C1003 Pacific Health Care Systems

Order Date 3/11/2019  
Required Date 3/12/2019  
Promise Date  
Pricing Date 3/11/2019  
Remarks

Number Format Confirmed 3/11/2019

Activity

Add comment...

Post

S Sales Manager @Demo Super User What do you think? 4 minutes ago Comment

S Sales Admin (Order Entry Clerk) @Sales Manager Do you approve this discount? 13 minutes ago Comment

S Sales Admin (Order Entry Clerk) created Sales Order Header 16 hours ago Comment

### Key Points


- Notifications
- Alerts



## Alerts

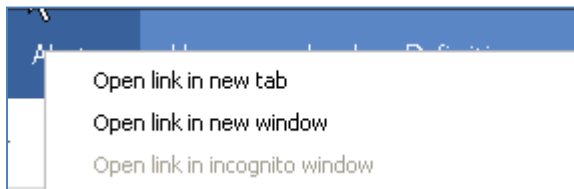
In this example, there was an alert automatically generated when a discount on the sales order was greater than 50%.

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



Sales Order Line  
Business Component

Sales Order Line Discount greater than 50%  
Alert

Main Message Notification Options Users

Main

Alert Sales Order Line Discount greater than 50%

Alert Label Sales Order Line Discount greater than 50%

Business Component Sales Order Line

Conditions:

+ New Delete More

Field	Operator	Value1	Value2
discountFormatted	greater than	50	

Send alert when conditions are met

4. Click **Message** panel

Note that both the MgrSales and user demo receive this alert

Main Message Notification Options Users

Message

Please verify this sales order. The discount of  $\$(discountPercent)$  exceeds 20%

Include Field

Notification Options

Delivery Immediate (when conditions are first met)

Repeat

Users

+ New Delete More

User ID	User Name
demo	Demo Super User
MgrSales	Sales Manager

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

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



Alerts

Default View + New Delete ...

Business Component +1

Item Main Field Changes Users

Alert Changes to Items with ABC Classification Code = A

Alert Label Changes to Items with ABC Classification Code = A

Business Component Item

Conditions:

+ New Delete More

Field	Operator	Value1	Value2
ABCClass	equals	A	

Send alerts about changes to fields

Field Changes

### 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**

## Profile ...



**Demo Super User**  
demo@qad.com

Contact Information Languages Notifications ▾ ⚙️

Profile changes will take effect the next time you sign in to QAD.

▾ **Contact Information**

User Name Demo Super User

User ID demo

Email Address demo@qad.com

▾ **Languages**

Language  ▾

Format Locale  ▾



3. Click **Notifications** panel

Contact Information Languages **Notifications**

Notifications

Receive Notifications

Category Settings

Edit More

Notification Category	QAD Inbox	Email
Activity	Yes	No
Alerts	Yes	No
Approvals	Yes	Yes
Reports	Yes	No

**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.

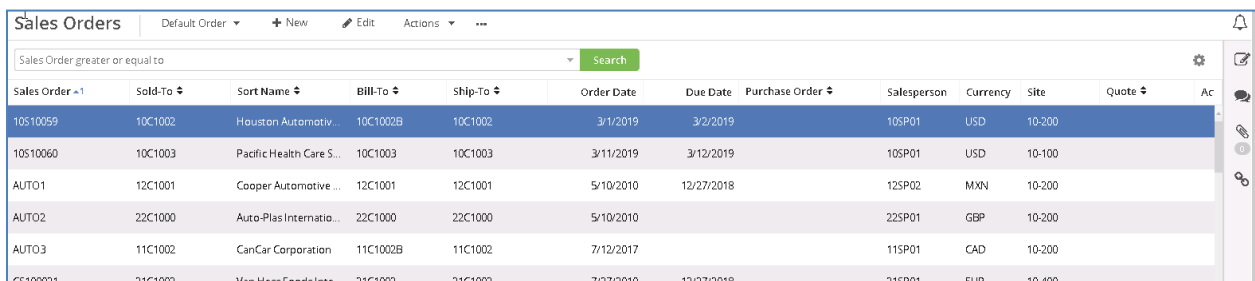
### Screen Design

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**



Sales Order	Sold-To	Sort Name	Bill-To	Ship-To	Order Date	Due Date	Purchase Order	Salesperson	Currency	Site	Quote	Ac
10S10059	10C1002	Houston Automotiv...	10C1002B	10C1002	3/12/2019	3/2/2019		10SP01	USD	10-200		
10S10060	10C1003	Pacific Health Care S...	10C1003	10C1003	3/11/2019	3/12/2019		10SP01	USD	10-100		
AUTO1	12C1001	Cooper Automotive ...	12C1001	12C1001	5/10/2010	12/27/2018		12SP02	MXN	10-200		
AUTO2	22C1000	Auto-Plas Internatio...	22C1000	22C1000	5/10/2010			22SP01	GBP	10-200		
AUTO3	11C1002	CanCar Corporation	11C1002B	11C1002	7/12/2017			11SP01	CAD	10-200		
CS100001	21C1002	Van Hise Foods Int...	21C1002	21C1002	7/27/2010	12/27/2018		21SP01	EUR	10-400		

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



Sales Orders | Default Order | + New | Delete | Actions | ...

Sales Order	Sold-To
10S10059	10C1002
10S10060	10C1003
AUTO1	12C1001
AUTO2	22C1000
AUTO3	11C1002
CS100021	21C1002
csbws1	11C1002
csbws2	12C1001

10C1002 Houston Automotive Group | 10S10059 Order | 0.00 USD Order Total | No Credit Issues Action Status

Main | Order Lines | Shipping | Billing | Salespersons | Totals | Notes | ...

Sold-To: 10C1002  
Houston Automotive Group  
801 Louisiana, Suite 700  
Houston, TX 77002  
USA - TAX PURPOSE

Ship-To: 10C1002  
Houston Automotive Group

Order Date: 3/1/2019  
Required Date: 3/2/2019  
Promise Date:   
Pricing Date: 3/1/2019  
Remarks:

3. Click More icon

Sales Orders | Default Order | + New | Delete | Actions | ...

Favorite ☆  
Design Layout  
Permissions  
Show Group By  
Export

4. Select **Design Layout**

Select a Design Layout | + New Layout | X

Name	Description	Active
System Wide		
QAD System Default	QAD System Default	Yes

Continue | Cancel



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

### New Layout ✕

Name

Description

Layout Context

App

App URI

Select Existing Template

Name	Description
<input checked="" type="checkbox"/> QAD System Default	QAD System Default

7. Click **Continue**



Sales Orders | Design Layout | UK Sales Orders ...

Sold-To **Sold-To cus** Sold to address field 1

Order **Sales orde**

Order Total **Total order amount** **Curre** **The transaction type**

Action Status **Act** **Action Status description**

Main | Order Lines | Shipping | Billing | Salespersons | Totals | Notes

▼ Main

Sold-To **Sold-To cus**

Ship-To **Ship-To**

Number Format **Specifies th**

Order **Sales order** Revision **Revision**

Purchase Order **Sales order's purchase ora**

Order Date **MM/DD/YYYY**

Required Date **MM/DD/YYYY**

Promise Date **MM/DD/YYYY**

Pricing Date **MM/DD/YYYY**

Remarks **Sales order's remarks**

Confirmed  **MM/DD/YYYY**

Taxable

Entered By **User who cr**

Set Layout Properties

Name **UK Sales Orders**

Description **UK Sales Orders**

Active **No**

Layout Context **22UK**

App **QadExtensions**

App URI **urn.app.com.extensio...**

View Field Properties

Add to Layout

Show Unused Only

Form Elements

Fields

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

Main | Order Lines | Shipping | Billing | Salespersons | Totals | Notes

▼ Main

Sold-To **Sold-To cus**

Ship-To **Ship-To**

Order Date **MM/DD/YYYY**

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

Main | Order Lines | Shipping | Billing | Salespersons | Totals | Notes

Number Format **Specifies th**

Remarks **Sales order's remarks**

Order **Sales order** Revision **Revision**

Purchase Order **Sales order's purchase ora**

Taxable

Entered By **User who cr**

▼ Order Options

**Confirmed**  **MM/DD/YYYY**

Detail Allocations

Consume Forecast

Import/Export

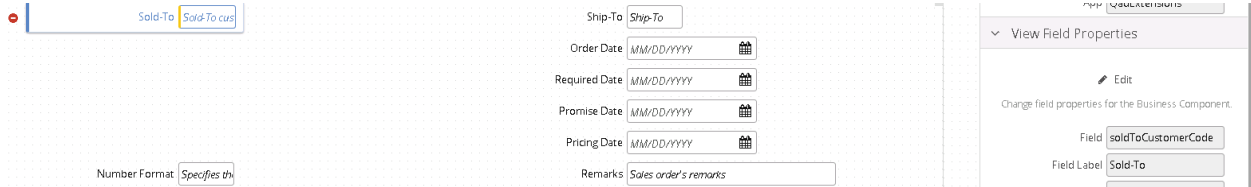
Consignment

EDI PO Acknowledgement

Language **Sales**

10. In Main, highlight **Sold-To**

11. Expand **View Field Properties**



12. Click **Edit**

13. Enter Field Label **Buyer**

### Business Component Field Properties

Field:

Business Component:

Detail Table:

Physical Field:

Layout Context:

---

**⚠ Changes to these properties affect all layouts using this Business Component.**

Default Value:

Required:

Field Label:

Field Length:

Format:

---

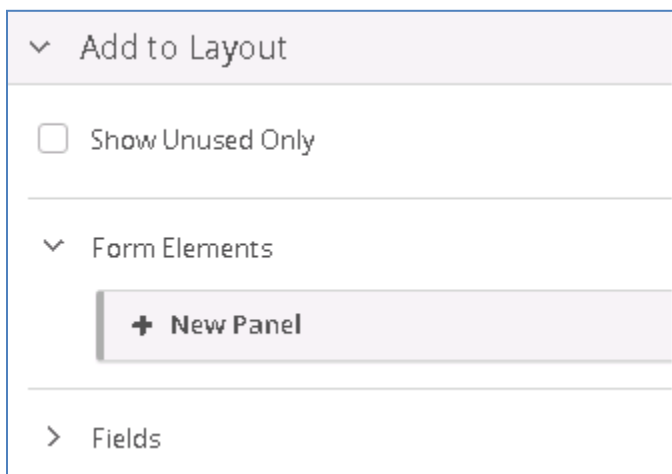
Reset properties to their original values.

14. Click **Save & Done**

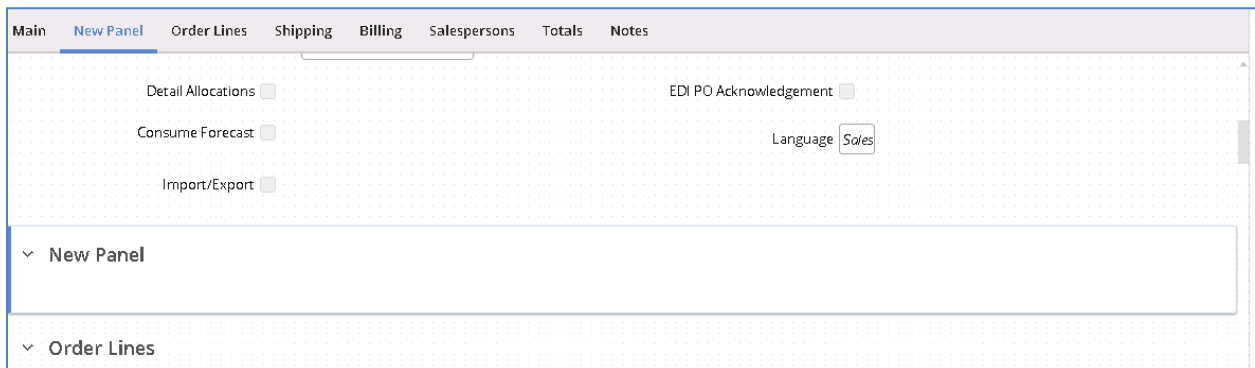


15. Collapse Main panel

16. On right, expand **Add to Layout > Form Elements**



17. Drag & Drop **+ New Panel** after Main

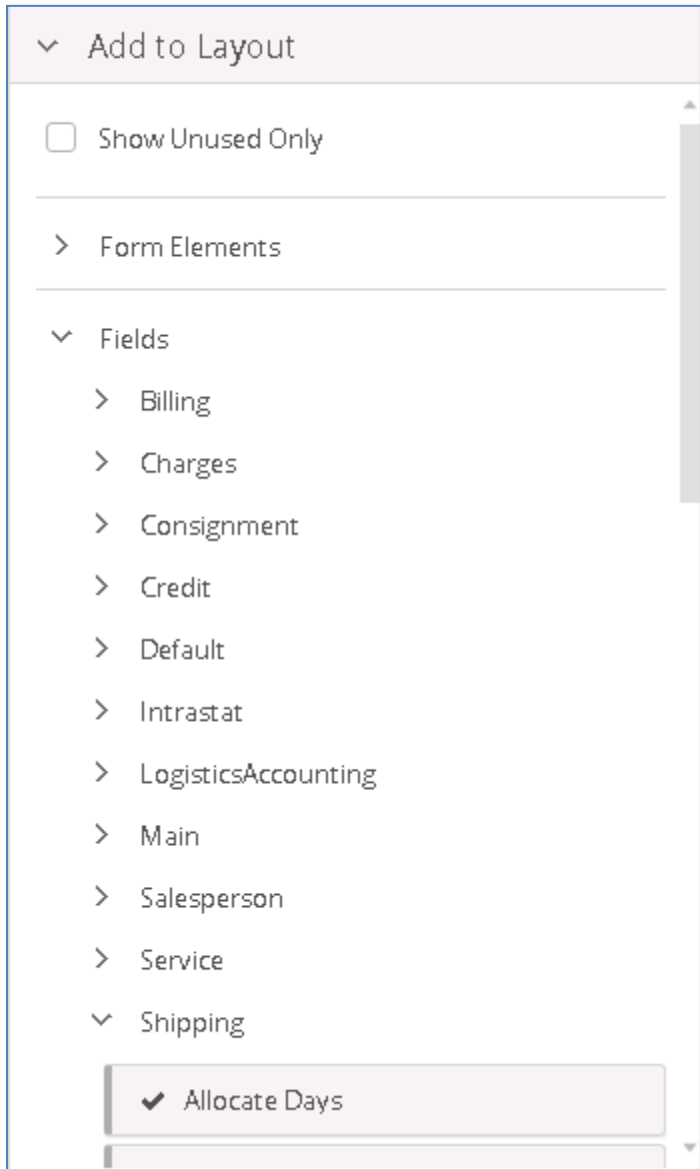


18. Highlight New Panel

19. Enter Display Label **UK Specific Data**

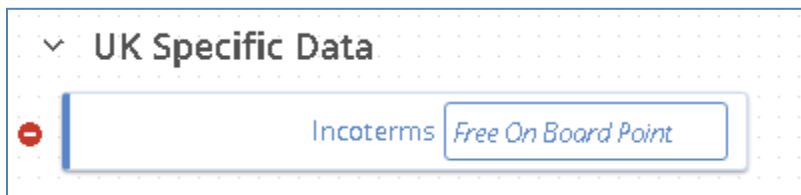


20. On right, expand **Add to Layout > Fields > Shipping**



21. Page Down

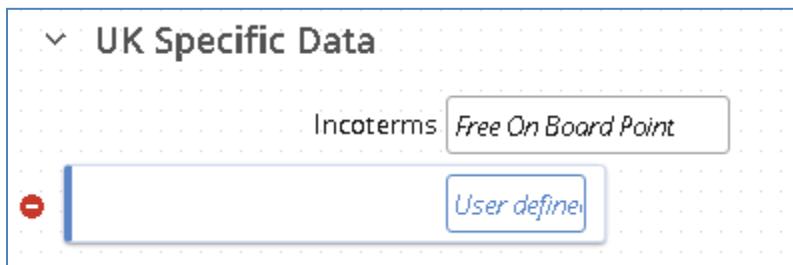
22. Drag & Drop **Incoterms** to **UK Specific Data** panel



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**



View Field Properties

Edit

Change field properties for the Business Component.

Field

Field Label

Business Component

Detail Table

Physical Field

26. Click **Edit**

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

Default Value

Required

Field Label

Field Length

Format

Reset properties to their original values.

28. Click **Save & Done**

A screenshot of a web form titled 'UK Specific Data' with a dropdown arrow. It contains two input fields: 'Incoterms' with the value 'Free On Board Point' and 'UK Tax Type' with the value 'User de'. A red minus sign is visible on the left side of the 'UK Tax Type' field.

▼ UK Specific Data

Incoterms *Free On Board Point*

UK Tax Type *User de*

**Key Points**

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



### Drill-down Links

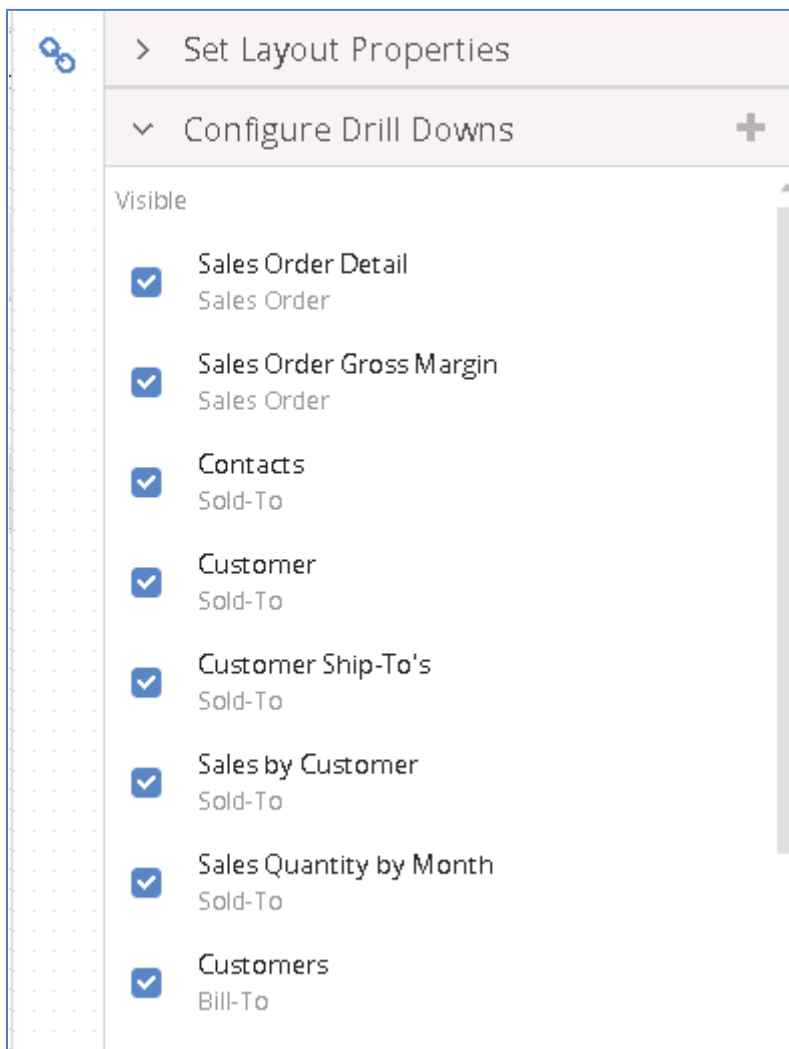
You can also review the associated links, and optionally hide any or all.

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.

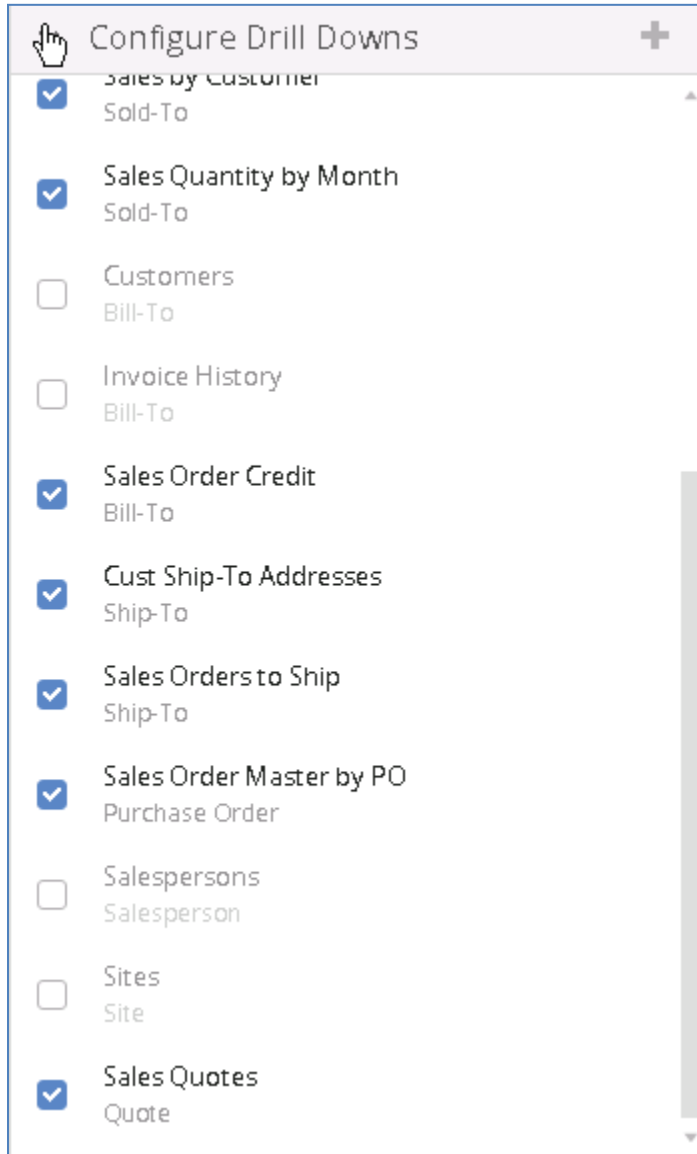
### Demo

1. Click Links  icon





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



3. Click **Save**

4. In Configure Drill Downs, click Add  icon



Design Layout Sales Orders > Drill Downs

### Drill Downs

Drill Down Label	Yes Visible	Generated From
------------------	----------------	----------------

Main Field Mapping

▼ Main

Drill Down To Hybrid View

Drill Down Hybrid View  **Select**

Use Existing Label

▼ Field Mapping

+ New Delete More

Source Browse Field	Drill Down Browse Field	Primary

OK Cancel

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

Resource ...

URI starts with "urn:view:hybridbrowse"  Search

URI	Description
urn:view:hybridbrow...	KPIs
urn:view:hybridbrow...	Approval Configuration
urn:view:hybridbrow...	Approval Log
urn:view:hybridbrow...	Approval Monitor
urn:view:hybridbrow...	Future Approvals
urn:view:hybridbrow...	Approval Routes

<< < > >> 100 Records per page 1 - 100 of 235

OK Cancel

6. In Search, click drop-down

7. Enter + **Description contains Sales Order**



URI starts with "urn:view:hybridbrowse" x

Search

Clear all

URI	starts with	urn:view:hybridbrowse	↔	-		+	x
Description	contains	Sales Order	↔	-		+	x

Search Cancel

8. Click **Search**

Resource ...

URI starts with "urn:view:hybridbrowse" x Description contains "Sales Order" x Search

URI	Description
urn:view:hybridbrow...	Sales Order Header Comments
urn:view:hybridbrow...	Sales Order Credit
urn:view:hybridbrow...	Sales Order Detail
urn:view:hybridbrow...	Sales Order Invoicing
urn:view:hybridbrow...	Sales Order Line Comments
urn:view:hybridbrow...	Sales Order Lines

Records per page: 100 1 - 7 of 7

OK Cancel

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

Design Layout Sales Orders > Drill Downs

Drill Downs

Sales Order Header Comme...	Yes	Generated From
Drill Down Label	Visible	

Main Field Mapping

Main

Drill Down To Hybrid View

Drill Down Hybrid View Sales Order Header Comments select urn:view:hybridbrowse.com qad.erp.salesOrderComments

Use Existing Label

Field Mapping

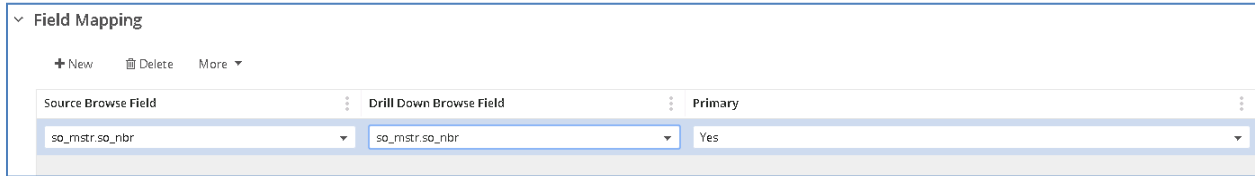
Source Browse Field	Drill Down Browse Field	Primary
---------------------	-------------------------	---------

OK Cancel

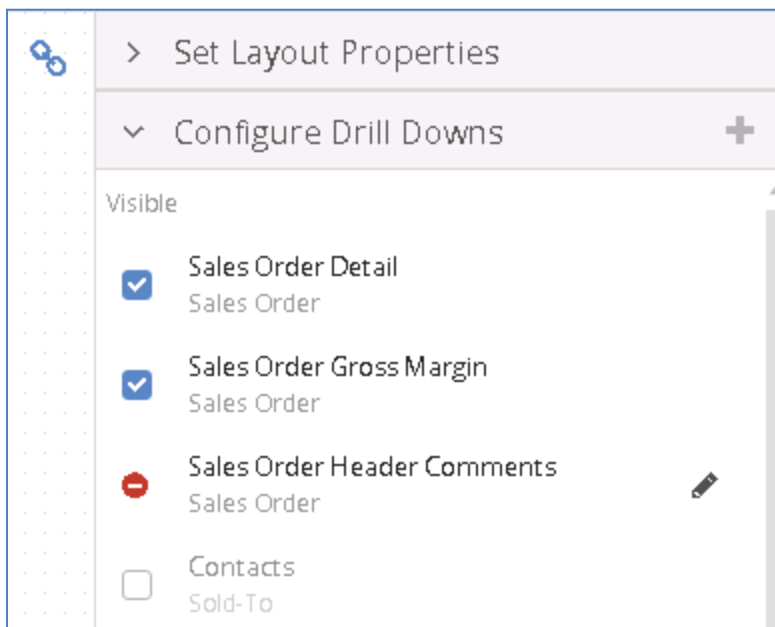


10. In Field Mapping, click **+New**

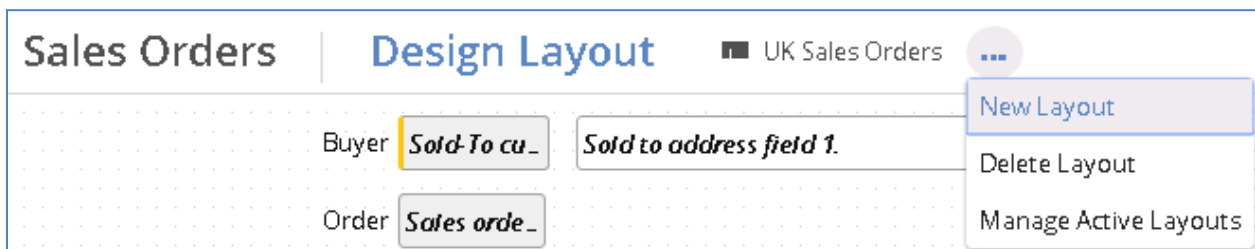
11. Using drop-downs, select Source Browse Field **so\_mstr.so\_nbr**, Drill Down Browse Field **so\_mstr.so\_nbr**



12. Click **OK**



13. Click More **⋮** icon



14. Click **Save**

15. Select **Manage Active Layouts**



Manage Active Layouts <span>✕</span>		
Active	Name	Description
System Wide		
<input checked="" type="checkbox"/>	QAD System Default	QAD System Default
Domain 22UK		
<input type="checkbox"/>	UK Sales Orders	UK Sales Orders

16. Check **UK Sales Orders**

17. Click **Apply**

**Confirm Active Layout Change** ✕

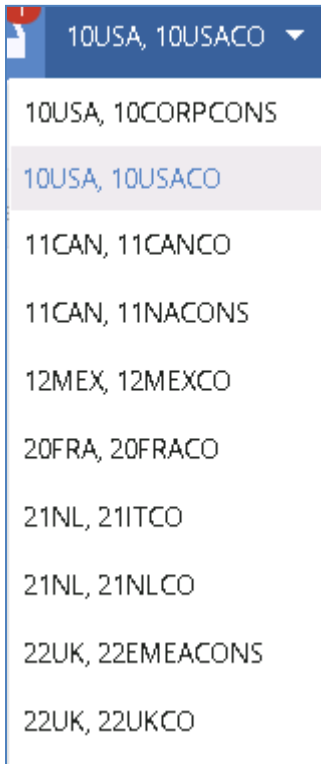
**?** Are you sure you want to change the following layouts to active?



- Domain 22UK : **UK Sales Orders**

**Confirm** **Cancel**

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



The screenshot displays the QAD Sales Orders web application. The top navigation bar includes 'QAD Admin', 'Activity Tracking', 'Approvals', 'Alerts', 'Users', 'Lookup Definitions', 'Security', 'View Builder', and 'More'. The main content area is titled 'Sales Orders' and shows a list of orders on the left. The selected order is '12C1001 Cooper Automotive De Mexico' with a total of '0.00 MXN'. The main view is divided into sections: 'UK Specific Data' with fields for 'Incoterms' and 'UK Tax Type'; 'Order Lines' with a table showing one line item 'Motor Asm 8 Way Seat Adj' with a quantity of 0.0; and 'Shipping' with fields for 'Ship-To' and 'Freight List'. A 'Drill-Down Links' sidebar on the right lists various related reports and actions.

### Key Points

- Add/remove links



### Lookup Browsers

The other capability to note is the ability to add Lookup Browsers. 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

Module	Field	Reference	Browse	Result Field	Search Field
urn:app.com.qad.ass...	urn:field.com.qad.as...		urn:browse:mfg:ea110	account acct_no	
urn:app.com.qad.ass...	urn:field.com.qad.as...		urn:browse:mfg:ea296	activity activity_code	
urn:app.com.qad.ass...	urn:field.com.qad.as...		urn:browse:mfg:ea503	cost_center cc	
urn:app.com.qad.ass...	urn:field.com.qad.as...		urn:browse:mfg:ea296	activity activity_code	

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**

Field: urn:field:com.qad.sales.salesorder.ISalesOrderHeader:SalesOrderHeader.soMstrChr01

Reference: [Empty]

Module: urn:module:com.qad.sales

Browse: urn:browse:mfg:mg004

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**



Search Conditions

+ New Delete More

Field Name	Operator	Value	Type
code_mstr.code fldname	equals	soMstrChr01	Literal

1 - 1 of 1

- 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**

Generalized Codes

Field Name	Value
abd_conv	
abd_conv	FM
abd_conv	HYnoDisp
abd_conv	HYwDisp
abd_conv	MHY

Main

Field Name: soMstrChr01  
Value: UK1  
Comments: UK Tax Type 1  
Group: APP

- 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**

Generalized Codes

Value contains "UK" Search

Field Name	Value	Comments	Group
soMstrChr01	UK1	UK Tax Type 1	APP
soMstrChr01	UK2	UK Tax Type 2	APP
soMstrChr01	UK3	UK Tax Type 3	APP

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



16. Click **UK Specific Data** panel

Main ▾ **UK Specific Data** Order Lines Shipping Billing ▾ Salespersons Totals ▾ Notes ⚙

▼ **UK Specific Data**

Incoterms

UK Tax Type

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

Generalized Codes + New Edit ...

Field Name = "soMstrChr01" Search

Field Name	Value	Comments	Group
soMstrChr01	UK1	UK Tax Type 1	APP
soMstrChr01	UK2	UK Tax Type 2	APP
soMstrChr01	UK3	UK Tax Type 3	APP

100 Records per page 1 - 3 of 3

OK Cancel

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