QAD CSS Admin Guide Change Summary

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

Date/Version	Description	Reference
March 2016/CSS 5.4.2	Added information on setting up Payflow Gateway account	Page 81
	Deleted descriptions of unused fields	Page 81
March 2015/CSS 5.4.1	Updated the description of the registry field *ShowPartialShipper*	Page 219
September 2014/CSS 5.4	Updated the information on defining a credit card vendor	Page 80
	Updated Credit Card Transaction Report Request Screen	Page 202
	Updated Credit Card Transaction Report	Page 202
March 2014/CSS 5.3	Updated the calendar picture	Page 7
	Added an example to show how to display an expandable menu	Page 123
	Added *Header* and *Footer* for an E-Mail Master Entry	Page 148
	Updated the description about the system registry *exHeaderType*	Page 224
	Added a new system registry *exHeaderButtonIcon*	Page 223
	Added a new system registry *stylesheet*	Page 229
September 2013/CSS 5.2.3	Updated the description on Data Translation	Page 7
March 2013/CSS 5.2.2	Updated the description about the field *Post to QAD Core*	Page 107
	Updated the description about the system registry field *searchList*	Page 215
September 2012/CSS 5.2.1	Added a Calendar and a Security Group drop-down list to User Maintenance	Page 49
	Added a Calendar to Detail Special Master Edit	Page 76
	Updated the description for Special ID	Page 78
March 2012/CSS 5.2	Added an option *Integrated with Configurator* in System Control	Page 116
	Added a field *Include Configuration Details* for internal order reports	Page 175
	Added a note about the *addItemOnce* system registry setting	Page 207
	Added the *ConfiguratorWSURL* system registry setting	Page 223
	Added the *ShowSTDEXTConfTabs* system registry setting	Page 228
September 2011/CSS 5.1.3	Changed descriptions about lookup and browse	Page 6
	Changed pictures and descriptions about customer selection during login	Page 17
	Added a field *All customers* for User Maintenance	Page 48
	Changed descriptions about creating a data source for a domain	Page 102
	Deleted notes about IE 7.0 not supported with Customer Load and Catalog Load	Page 124 Page 126

Date/Version	Description	Reference
	Changed pictures and descriptions about Catalog Upload	Page 127 Page 128
	Changed pictures and descriptions about Documentation Master Report	Page 189
	Changed pictures and descriptions about System Module Report	Page 194
	Added the *orderEntryRightUI* system registry setting	Page 210
	Added the *searchMethod* system registry setting	Page 215
	Added the *setDueDate* system registry setting	Page 215

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Chapter 1

Introduction

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

Overview

QAD Customer Self Service (QAD CSS) is a Web-based order-entry application designed to work with QAD Enterprise Applications (QAD EA). It lets you extend your QAD EA to the Web in support of either business-to-business (B2B) order entry or business-to-customer (B2C) order entry.

With QAD CSS, you can:

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

B2B and B2C Implementations

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

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

Using this Guide

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

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

Administrative Functions

QAD CSS administration functions are divided into four categories:

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

Administrative functions include the following:

- Address Maintenance
- Carrier href Maintenance
- Contact Maintenance
- Contact Cross-Reference
- Customer Maintenance
- Icon Maintenance
- Item Layout Maintenance
- Item Types Maintenance
- Menu Button Maintenance
- Menu Maintenance
- Saved Report Maintenance
- Security Group Maintenance
- Session Maintenance
- Specials Maintenance
- System Registry
- User Registration
- User Maintenance

Language functions include:

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

Message functions include:

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

System control functions include:

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

Using QAD CSS with QAD EA

This release of QAD CSS fully supports QAD EA 2008 and higher; it cannot be used with earlier versions of QAD Enterprise Applications or MFG/PRO.

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

See “Data Source Maintenance” on page 101

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

All functions that relate to items and customers in QAD CSS require that you specify the associated data source (domain). It includes the functions in the following list.

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

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

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

QAD CSS User Interface

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

Fig. 1.1
Sample Maintenance Screen

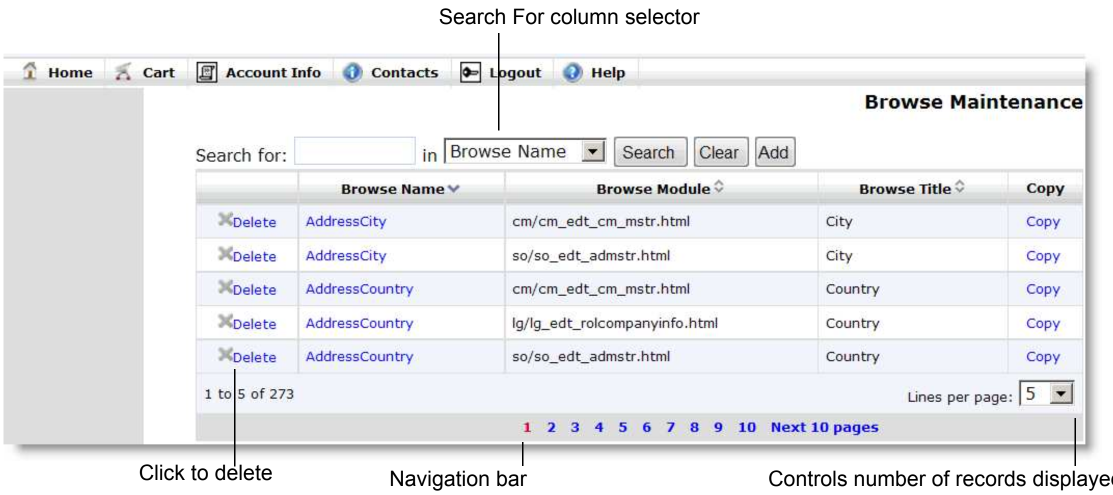


Figure 1.1 illustrates a sample maintenance screen in QAD CSS. Many screens open with the same type of display, which lists all currently defined records that you can maintain using the active function. In Figure 1.1, currently defined browses display.

These types of screens include the following key components:

See “Searching for Entries” on page 8 for details.

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

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

Search. Click Search to execute the search.

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

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

See “Sorting Entries” on page 9.

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

See “Deleting an Entry” on page 9.

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

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

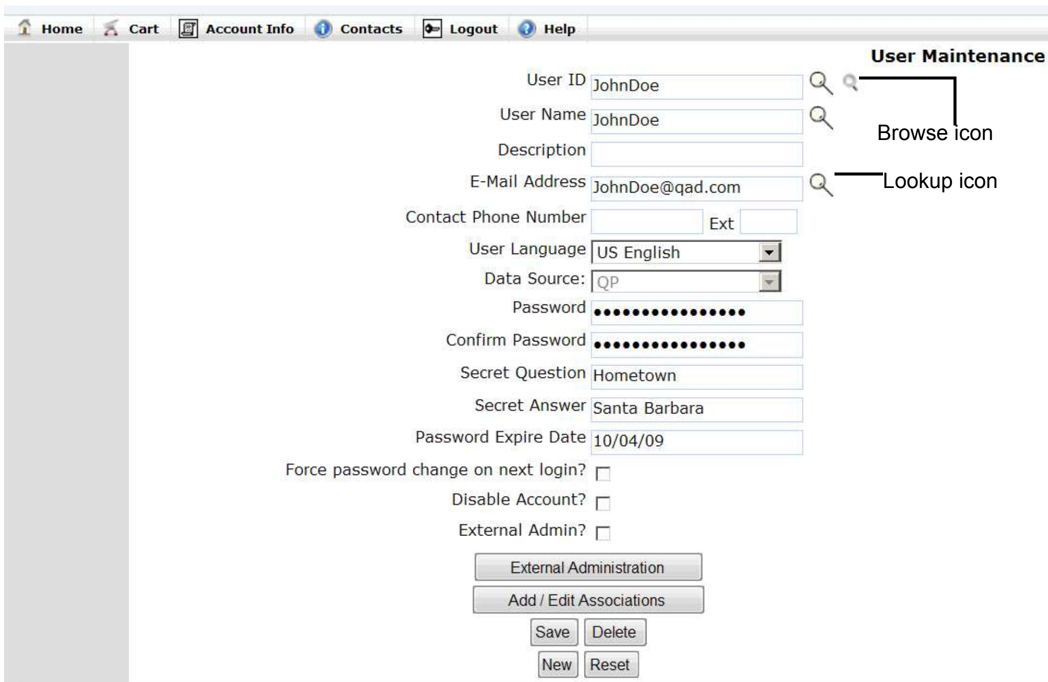
Example In Figure 1.1, click Browse Name to edit the code.

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

Using Edit Screens

Figure 1.2 illustrates a typical edit screen.

Fig. 1.2
Sample Edit Screen



Lookup and Browse Icons

Some fields in edit screens display associated icons.

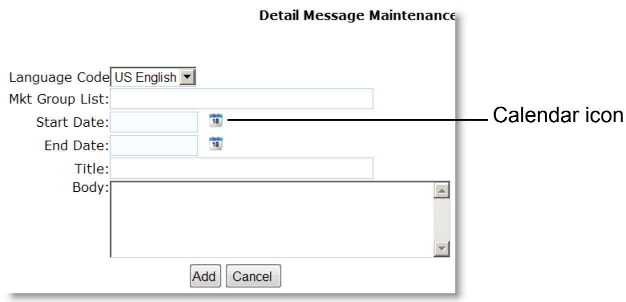
Lookup. Enter a value in the associated field and then click this icon to find the other data associated with the record. For example, enter Bob in the User ID field and click the lookup icon. The system finds the first user record with the string Bob and displays all the related data.

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

Calendar Icons

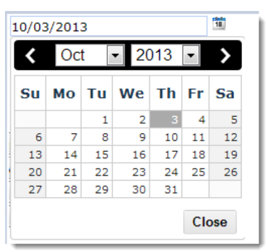
Figure 1.3 illustrates an edit screen with the calendar icon.

Fig. 1.3
Screen with Calendar for Specifying Dates



Calendar icon. Click the calendar icon to display a calendar as shown in Figure 1.4.

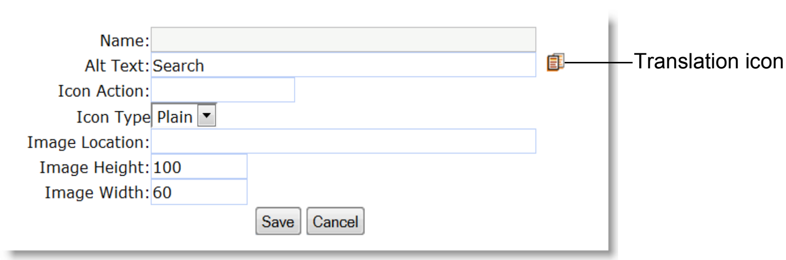
Fig. 1.4
Calendar



Data Translation Icon

If you have a multi-language version of QAD CSS, you can use the data translation function. You can see translation icons next to the fields.

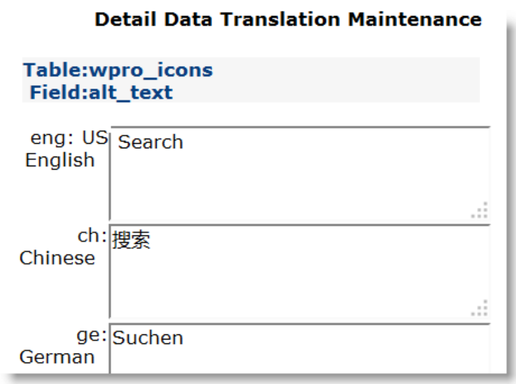
Fig. 1.5
Translation Icon



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

Clicking the translation icon activates a window that allows translation of the corresponding data field. See Figure 1.6 for an example.

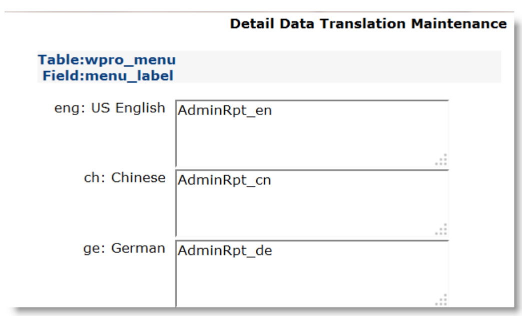
Fig. 1.6
Detail Data Translation Maintenance



But for data translation in Menu Maintenance, the system requires that you set up string names first and then use String Translation Maintenance to add translation entries:

1. Click the translation icon next to the field.
2. In Detail Data Translation Maintenance, set string names for different language codes.

Fig. 1.7
Data Translation in Menu Maintenance



3. Use String Translation Maintenance and add translation entries for the strings that you defined in the previous step.
   a. Go to Home Menu|Administration Menu|Language Menu|String Translation Maintenance.
   b. Add translation entries for the strings. For more details, see “Adding a String Translation Entry” on page 142.

Searching for Entries

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

To search for an entry:

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

3 Click Search to execute the search.

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

Table 1.1
Search Criteria and Data Types

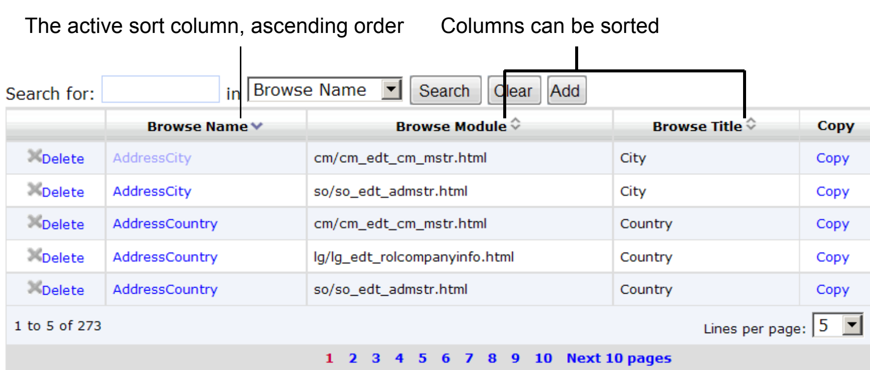
Search Type	Data Types
Contains/word index	Character
Equals	Integer, decimal, date, character fields
Begins	Character
Greater than or equal to	Integer, decimal, date, character fields

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

Sorting Entries

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

Fig. 1.8
Sorting Columns



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

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

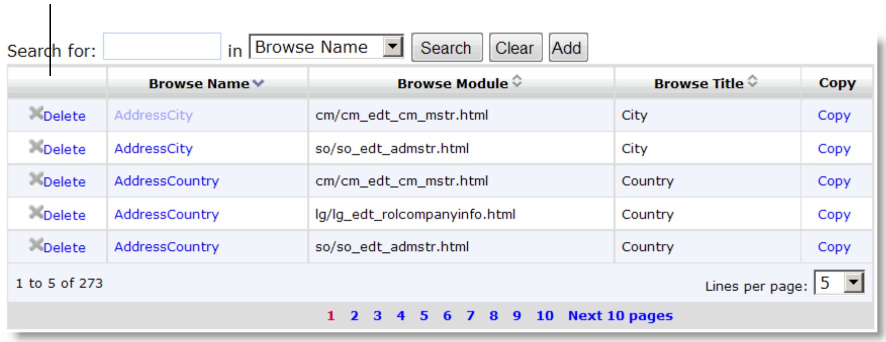
Deleting an Entry

The Delete function lets an administrator permanently delete records.

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

Fig. 1.9
Deleting Records

Click here to delete.



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

To delete a record:

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

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

Using a QAD CSS Web Site

See “Detail User Registration Editor” on page 46.

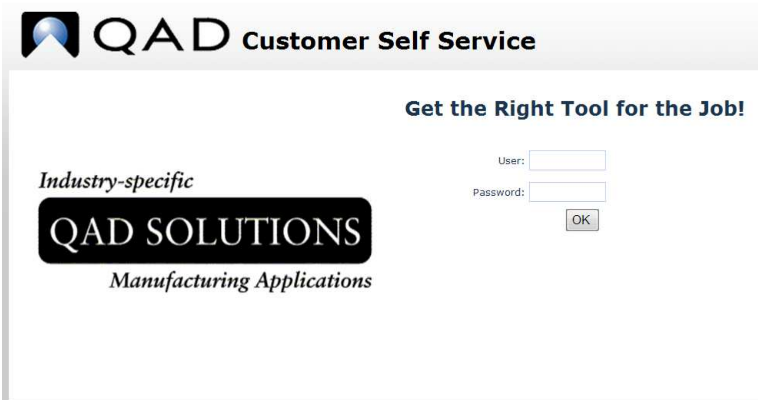
QAD CSS administrators control who can log in to a QAD CSS Web site by enabling or disabling user records. Administrators establish users and set up personal IDs, passwords, contact information, and preferences. Administrators also set up security that controls user access to QAD CSS functions at the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

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

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

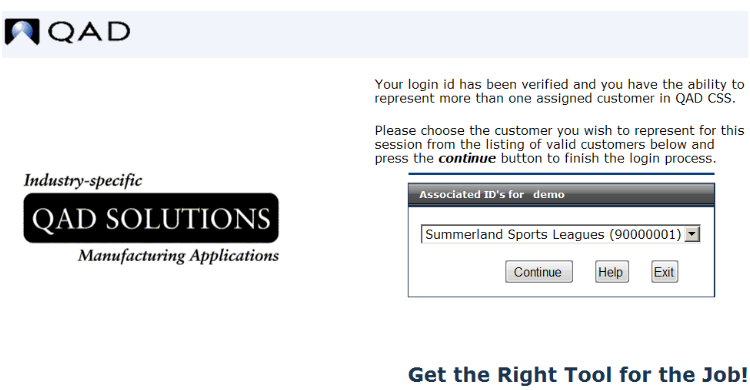
Figure 1.10 illustrates how the user is prompted during login. This page, including the message content, can be customized.

Fig. 1.10
User Login



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

Fig. 1.11
User Login with Customer Selection



See “Customer Selection” on page 17.

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

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

See “Detail User Registration Editor” on page 46.

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

QAD CSS Home Page

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

See Appendix A, “System Registry Fields”, on page 203.

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

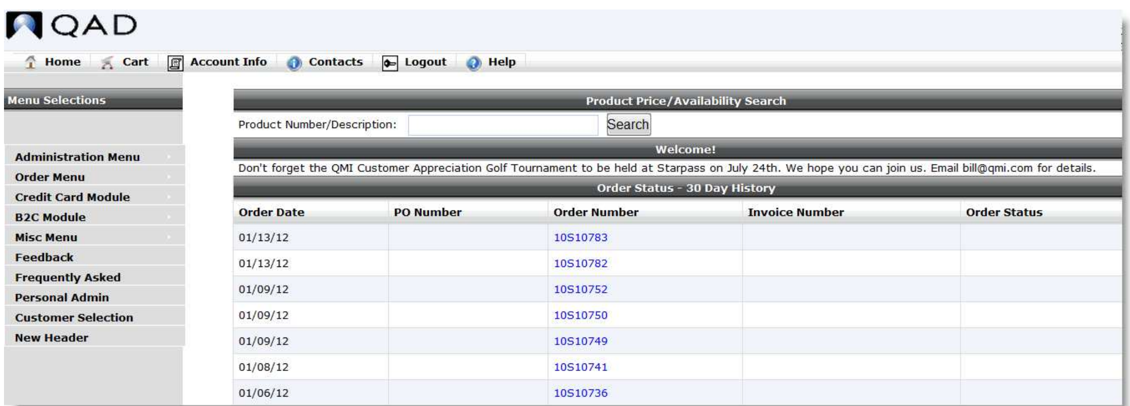
See “Security Group Maintenance” on page 41.

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

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

Figure 1.1 illustrates a sample QAD CSS home page.

Fig. 1.12
Sample QAD CSS Home Page



Menu Bar

See “Menu Button Maintenance” on page 66.

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

Fig. 1.13
Menu Bar

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

Home. Returns the user to their designated home page.

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

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

See “Contact Maintenance” on page 27.

Contacts. Displays your company contact information.

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

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

Navigation Menu

See “Menu Maintenance” on page 70.

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

Messages

See Chapter 5, “Messages”, on page 145.

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

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

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

Icons

See “Icon Maintenance” on page 57.

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

Order Entry

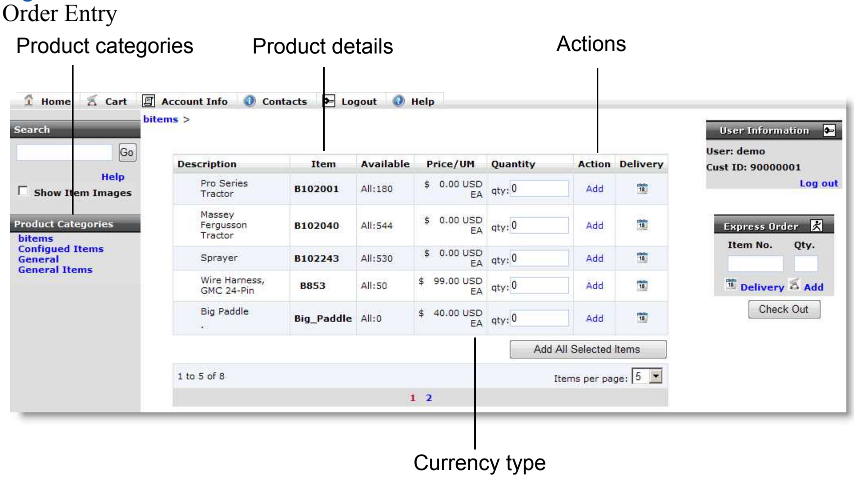
See “Customer Maintenance” on page 33.

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

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

Figure 1.14 illustrates a sample order-entry screen with product categories and item list.

Fig. 1.14
Order Entry



See “System Registry Maintenance” on page 89.

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

See “Item Types Maintenance” on page 63.

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

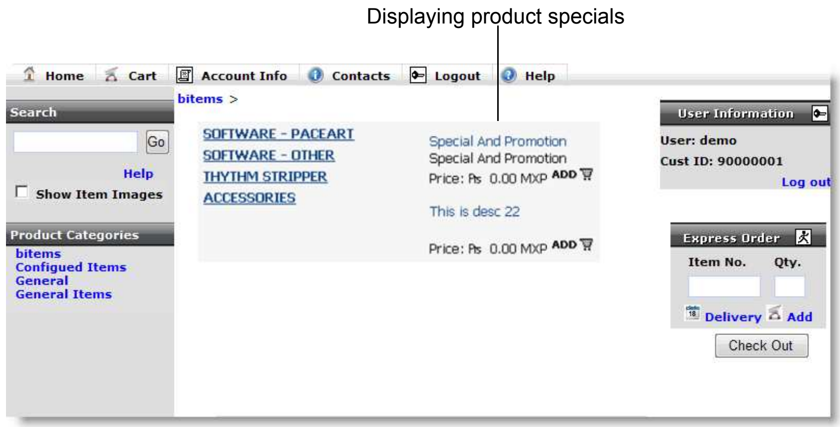
See “Item Layout Maintenance” on page 60.

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

See “Specials Maintenance” on page 74.

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

Fig. 1.15
Displaying Specials and Promotions in Order Entry



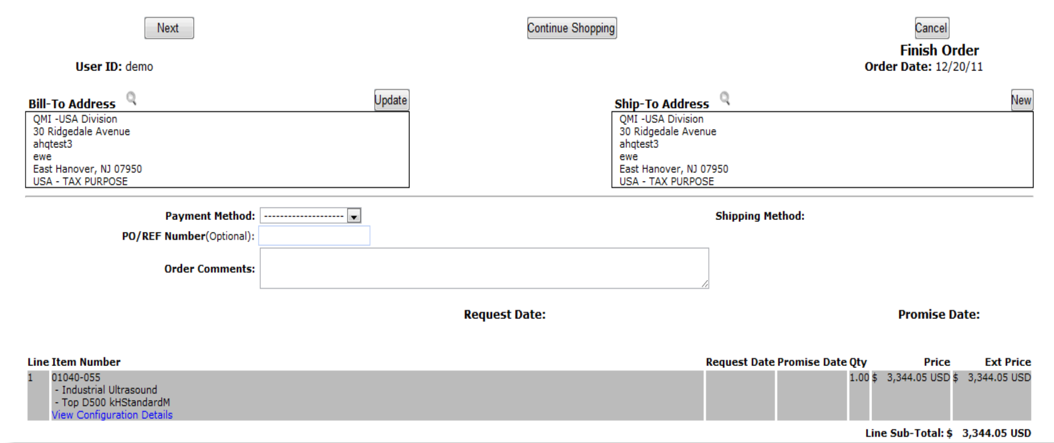
Specials can be selectively offered to specific marketing groups and have specific start and end dates.

See “Address Maintenance” on page 23.

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

Figure 1.16 illustrates an order ready to be submitted.

Fig. 1.16
Finish Order



Personal Administration

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

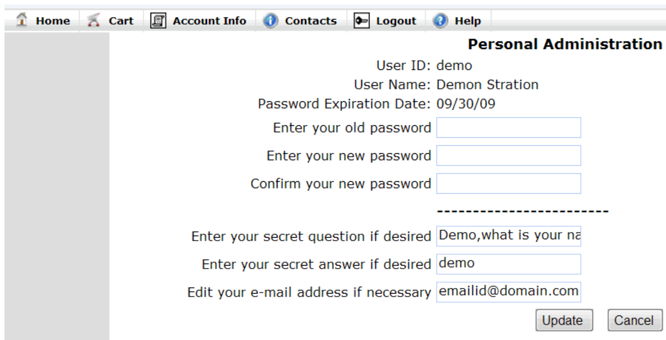
See “Detail User Registration Editor” on page 46.

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

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

Clicking the Personal Administration menu option displays the screen in Figure 1.17. If the user password has expired, Personal Administration may display as the login page.

Fig. 1.17
Personal Administration



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

The specific components found on this screen are:

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

User Name. Unique name of the user.

See “System Control Maintenance” on page 113.

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

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

Enter your new password. User’s new password.

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

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

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

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

Clicking a command button executes one of the following actions:

- Update saves the record to the database. Before saving, ensure that all required fields are populated. The system verifies that the record is unique and compares the password to the existing record. When validated, a record is updated in the database. If validation fails, a message specific to the error is displayed and the record is not updated.

- Cancel returns to the index page without changing the database.

Adding a Personal Administration Entry

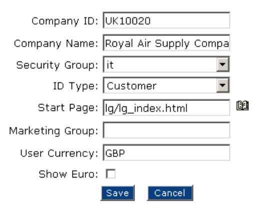
See “Detail User Registration Editor” on page 46.

Customer Selection

See “Detail User Registration Editor” on page 46.

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

Fig. 1.18
Company ID Set Up in User Maintenance



Note In System Registry Maintenance, the registry option *custDisplayLimit* determines how users select a customer during login when more than one customer is associated with them in User Maintenance.

- If the number of customer records associated with the user is less than the value you specify, a drop-down list appears, as shown in Figure 1.19.
- If the number of customer records associated with the user is greater than the value you specify, a screen with lookups appears, as show, in Figure 1.20.

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

Fig. 1.19
User Login with Customer Selection

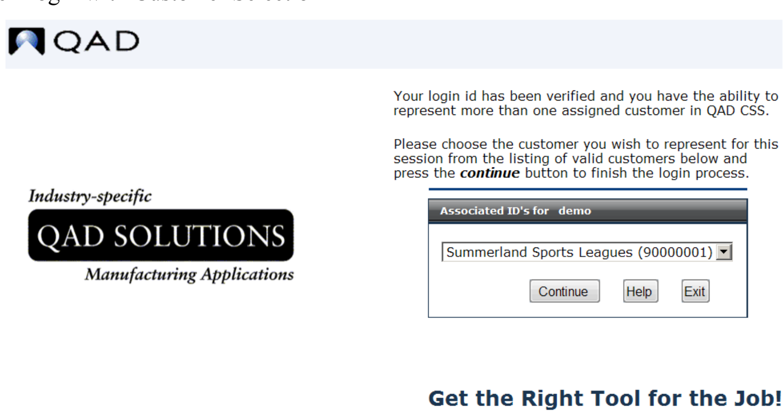
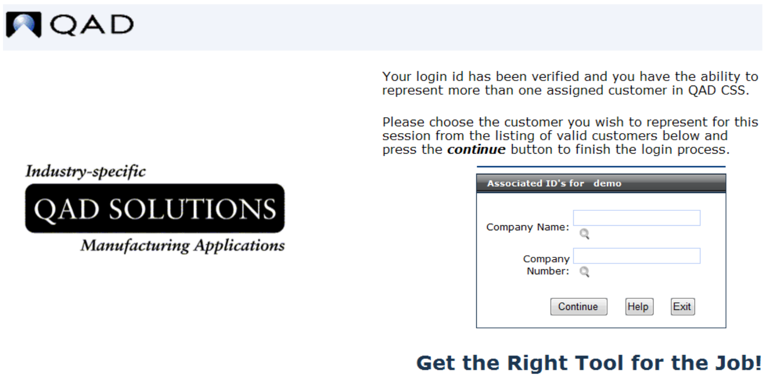


Fig. 1.20
User Login with Customer Selection with Lookups



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

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

The specific components found on this screen are:

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

Help button. Click to display a help dialog.

Exit button. Click to return to the login screen.

Menu Registration

See “System Module Maintenance” on page 117.

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

Table 1.2
Home Page Function Registration Programs

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

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

Table 1.3
Administration Function Registration Programs

Function Name	Registered Page
Address Maintenance	ad/ad_mnt_addr.html
Carrier href Maintenance	ad/ad_mnt_carrierhref.html
Contact Maintenance	ad/ad_mnt_contact.html

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

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

Table 1.4
Language Function Registration Programs

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

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

Table 1.5
Message Function Registration Programs

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

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

Table 1.6
System Control Function Registration Programs

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

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

Table 1.7
Report Menu Registration Programs

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

Chapter 2

Administration

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

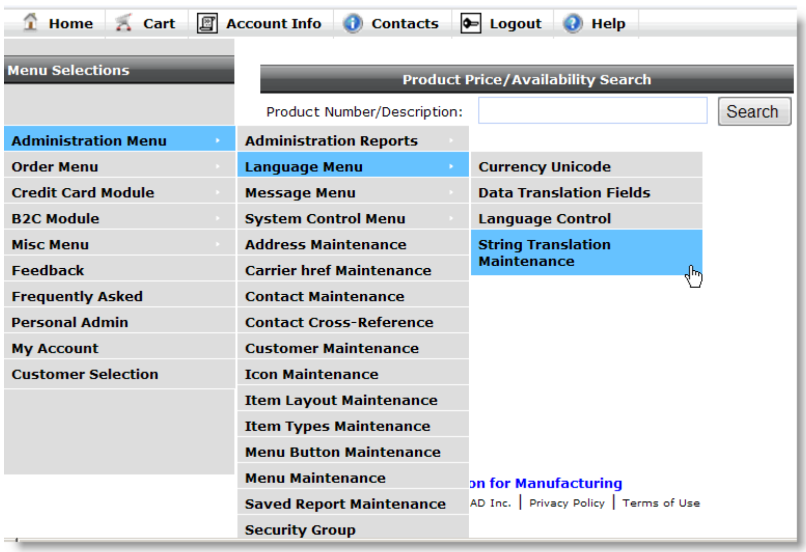
Introduction

Administrative functions let you manage information related to users of the system—both internal and external. Most information about customers is obtained from QAD EA, so use these functions only for temporary changes.

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

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

Fig. 2.1
Administration Menu



Administrative functions include the following:

- Address Maintenance is used to create, modify, delete, and store temporary addresses before they are committed to QAD EA.
- Carrier Href Maintenance associates HTML links with the tracking capabilities of a shipping carrier's Web site.
- Contact Maintenance is used to specify information about the individuals at your company who respond to customer requests.
- Contact Cross-Reference associates contacts at your company with your customers.
- Customer Maintenance overrides and extends QAD EA system information related to customers and items.
- Icon Maintenance sets the graphic images used to pass information to the end user through visual cues.
- Item Layout Maintenance maintains predefined registry options that determine which product details appear in the product catalog.
- Item Types Maintenance establishes categories of items and their relationships to each other.
- Menu Button Maintenance is used to set up and configure the QAD CSS menu bar displayed at the top of every page.

- Menu Maintenance is used to edit and configure the QAD CSS navigational menu displayed to the left of the page.
- Saved Report Maintenance saves the search criteria used to generate a report for a specific QAD CSS module.
- Security Group Maintenance defines security groups to which users are assigned, limiting users to specific QAD CSS modules.
- Session Maintenance lets administrators monitor user session records and their related transactions.
- Specials Maintenance controls item promotions offered to customers while they visit a QAD CSS site.
- System Registry establishes how QAD CSS dynamically interprets and processes business rules.
- User Registration notifies administrators when potential customers submit an online request for a user login.
- User Maintenance establishes users and creates relationships between QAD CSS and QAD EA users.

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

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

Managing Users and Customers

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

- Address Maintenance
- Contact Maintenance
- Contact Cross-Reference Maintenance
- Customer Maintenance
- Security Group Maintenance
- User Registration
- User Maintenance
- User Master Maintenance
- B2C Maintenance

Address Maintenance

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

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

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

Address records are domain-specific. Make sure that you indicate which data source (domain) the record is associated with.

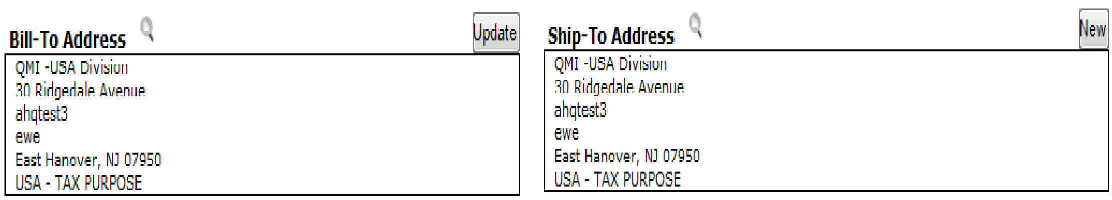
Temporary addresses are typically only needed when you implement a Web order-entry system for business-to-customer processing. The reasons for creating temporary addresses can be either of the following:

- Business rules are in effect that require temporary storage of the address before posting an order. For example, you want to review addresses to prevent shipment to a P.O. box.
- Orders are not posted directly. They require address modifications and that the system stores the modification until the order is released. For example, review requirements of all orders before they are committed to QAD EA.

Addresses are typically created during the order-entry process.

Important This function is not intended for long-term storage or maintenance of address records.

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



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

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

Fig. 2.3
Address Maintenance

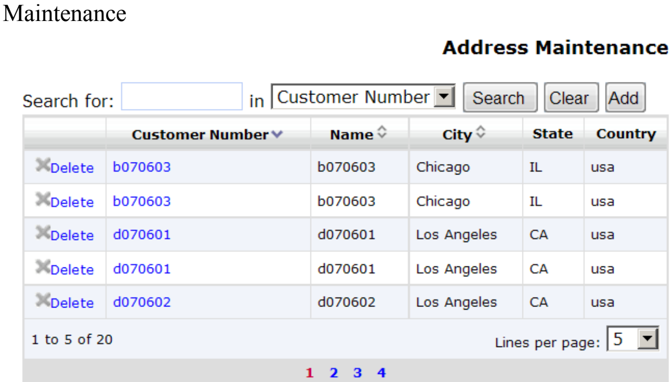


Table 2.1 summarizes the contents of the Address Maintenance navigation screen.

Table 2.1
Address Maintenance Navigation

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

Related QAD CSS functions:

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

Adding an Address Entry

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

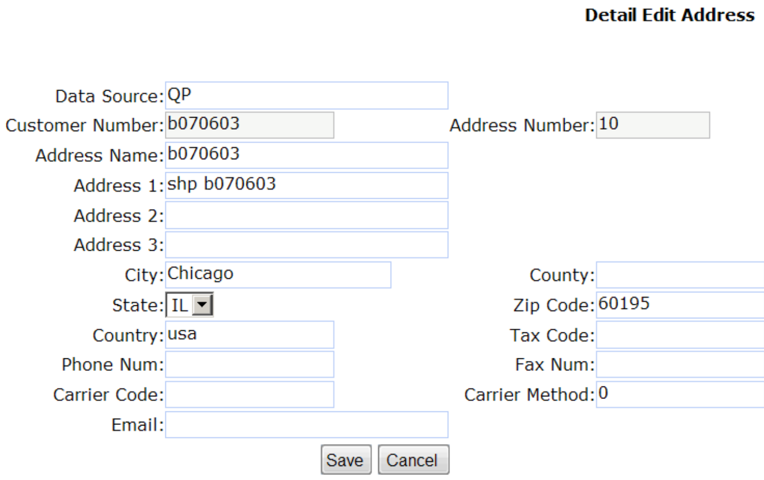
The following information is required to complete this process:

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

To create an entry:

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

Fig. 2.4
Detail Edit Address



Data Source. Choose the domain that this address is associated with.

Customer Number. Specify the unique identifier of this customer record in both QAD EA and QAD CSS. It is an integral link between the two systems.

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

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

Address 1–3. Address line entries.

City. City name of this address record.

State. State abbreviation code of this address record.

Country. Country name of this address record. This field displays a selection list of active country codes defined in QAD EA.

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

Carrier Code. Reference to customer's preferred shipping carrier; for example, UPS or FedEx. If you plan to set up carriers in Carrier Href Maintenance, make sure that it is a valid ship via code defined in QAD EA.

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

County. County name of this address record.

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

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

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

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

Clicking a command button executes one of the following actions:

- Add saves the new record to the database. Make sure that all required fields—indicated by alternate field color—are populated before you save a record. Before saving, the system verifies that the record is unique and displays an error if it is not.
- Cancel closes the window without adding the record.

Modifying an Address Entry

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

To modify an entry:

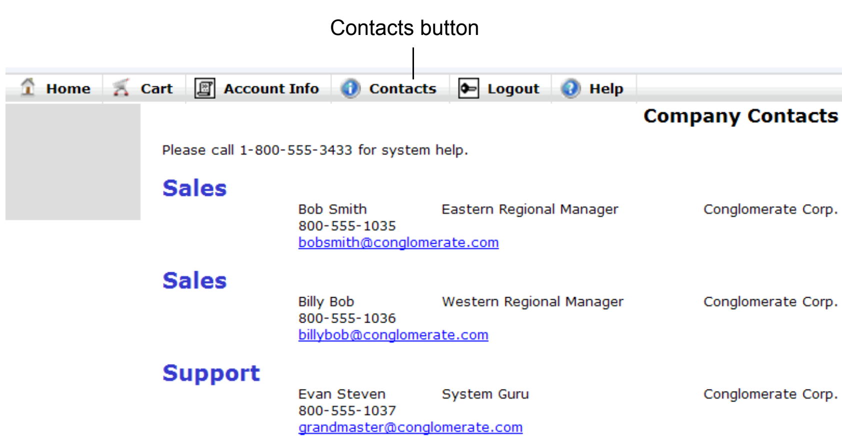
1. Display the record to modify.
2. Click the Customer Number link to display the edit screen.
3. Enter data into the appropriate fields. Fields that do not allow change are indicated by a second alternate color.
4. Click Save.

Contact Maintenance

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

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

Fig. 2.5
Contacts List



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

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

Fig. 2.6
Contact Maintenance

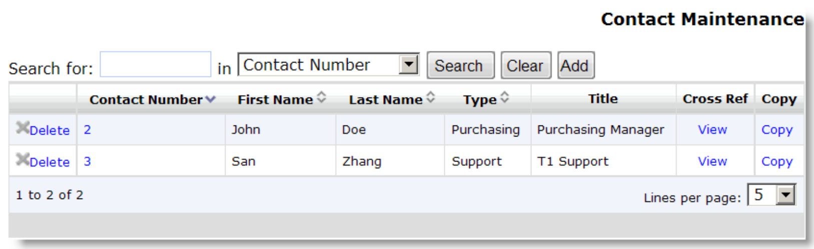


Table 2.2 summarizes the contents of the Contact Maintenance navigation screen.

Table 2.2
Contact Maintenance Navigation

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

Related QAD CSS functions:

- Contact Cross-Reference Maintenance

Adding a Contact Entry

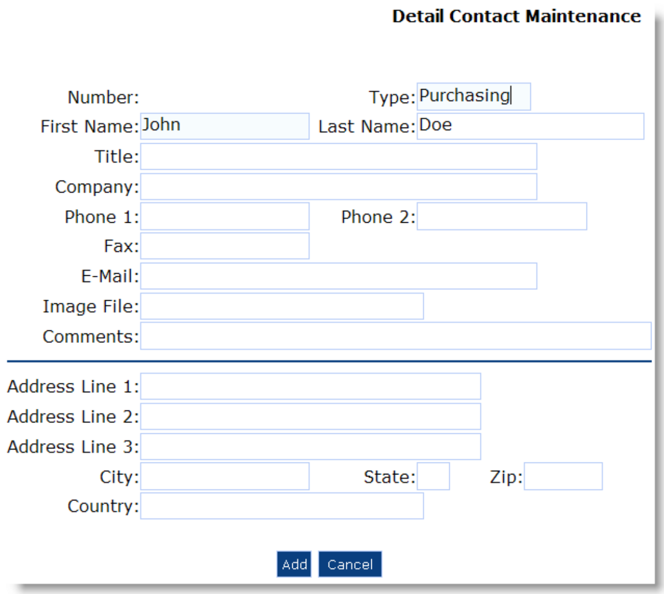
The Add function of Contact Maintenance lets an administrator add details about specific end-user contacts associated with a customer. The following information is required to complete this process:

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

To create an entry:

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

Fig. 2.7
Detail Contact Maintenance



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

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

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

First Name. The contact's first name.

Last Name. The contact's last name.

Title. Job title for this contact.

Company. Name of company where this contact works.

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

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

Fax. The contact's fax number.

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

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

Comments. Additional information regarding this contact.

Address line 1–3. Address line entries.

City. City name of this address record.

State. State abbreviation code of this address record.

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

Country. Country name of this address record. This field displays a selection list of country codes defined in QAD EA.

Clicking a command button executes one of the following actions:

- Add saves the new record to the database. Make sure that all required fields—indicated by alternate field color—are populated before you save a record. Before saving, the system verifies that the record is unique and displays an error if it is not.
- Cancel closes the window without adding the record.

Modifying a Contact Entry

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

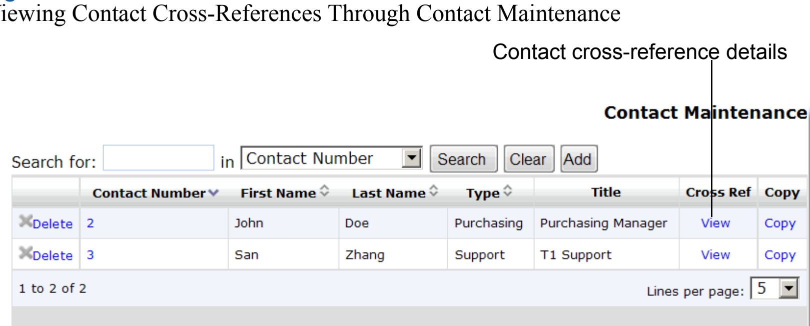
To modify an entry:

1. Display the record to modify.
2. Click the Contact Number link to display the edit screen.
3. Enter data into the appropriate fields. Fields that do not allow change are indicated by a second alternate color.
4. Click Save.

Contact Cross-Reference

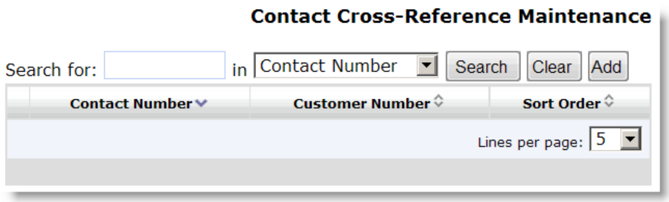
While in Contact Maintenance, you can click a View link to display cross-references corresponding to the contact row.

Fig. 2.8
Viewing Contact Cross-References Through Contact Maintenance



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

Fig. 2.9
Contact Cross-Reference Maintenance



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

Contact Cross-Reference Maintenance

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

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

Note Contact cross-reference records are domain-specific. Make sure that you indicate which data source (domain) the customers being cross-referenced are associated with.

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

Fig. 2.10
Contact Cross-Reference Maintenance

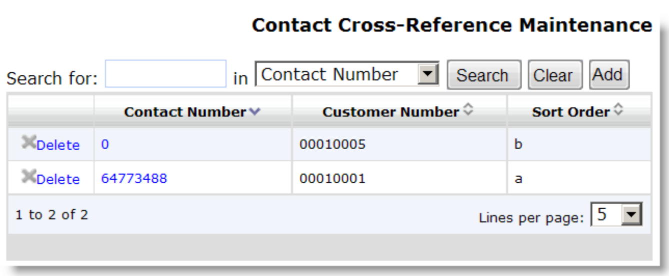


Table 2.3 summarizes the contents of the Contact Cross-Reference Maintenance navigation screen.

Table 2.3
Contact Cross-Reference Maintenance Navigation

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

Related QAD CSS functions:

- Contact Maintenance
- Customer Maintenance

Adding a Contact Cross-Reference Entry

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

The following information is required to complete this process:

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

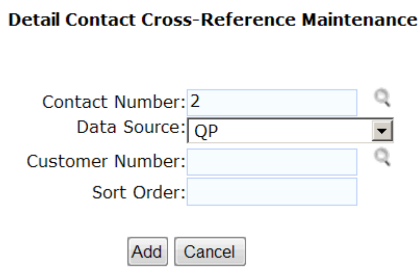
To create an entry:

1 Click Add in the navigation window to display the edit screen in Add mode.

2 Enter data into the appropriate fields.

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

Fig. 2.11
Detail Contact Cross-Reference Maintenance



Contact Number. Unique identifier for a contact.

Data Source. Choose the domain that the customer referenced by this contact is associated with.

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

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

Clicking a command button executes one of the following actions:

- Add saves the new record to the database. Make sure that all required fields—indicated by alternate field color—are populated before you save a record. Before saving, the system verifies that the record is unique and displays an error if it is not.
- Cancel closes the window without adding the record.

Modifying a Contact Cross-Reference Entry

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

To modify an entry:

1. Display the record to modify.
2. Click the Contact Number link to display the edit screen.
3. Enter data into the appropriate fields. Fields that do not allow change are indicated by a second alternate color.
4. Click Save.

Customer Maintenance

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

Important Customer records added or modified in Customer Maintenance in QAD CSS are not synchronized to QAD EA; you must manually update them in QAD EA. Maintaining customers this way is not recommended.

Customer records are domain-specific. Make sure that you indicate which data source (domain) each customer is associated with.

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

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

Important When a customer is deleted or deactivated in QAD EA, the corresponding customer record stored in QAD CSS will not be automatically synchronized. Submitting orders in QAD CSS with deleted or inactive customer IDs will fail and the user will receive error messages.

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

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

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

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

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

Fig. 2.12
Customer Maintenance

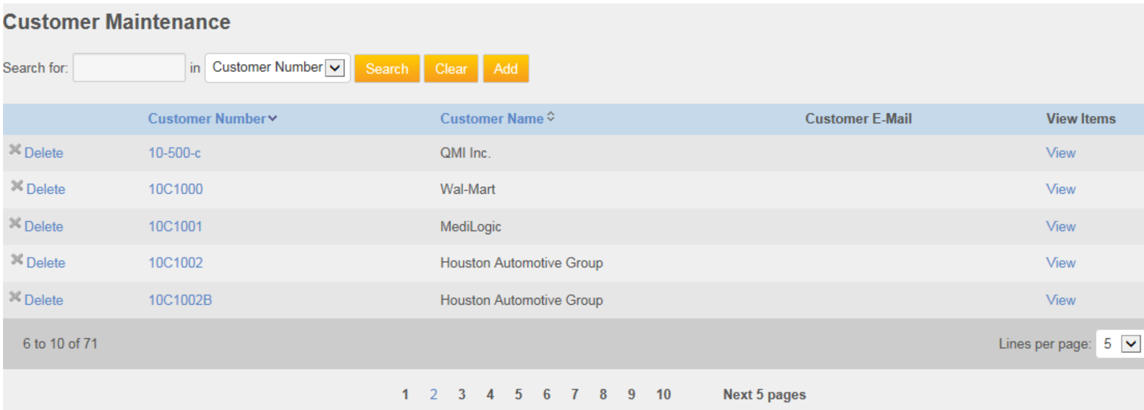


Table 2.4 summarizes the contents of the Customer Maintenance navigation screen.

Table 2.4
Customer Address Maintenance Navigation

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

Adding a Customer

The Add function of Customer Maintenance lets an administrator add customers.

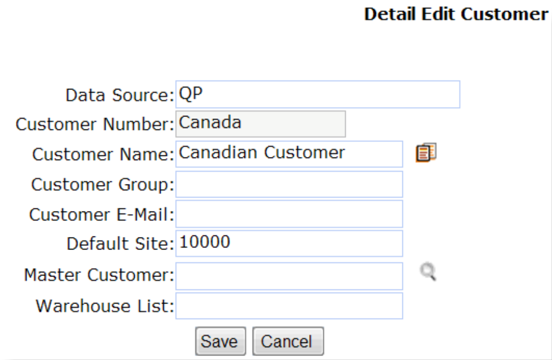
The following information is required to complete this process:

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

To create an entry:

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

Fig. 2.13
Detail Edit Customer



Data Source. Choose the domain that this customer is associated with.

Customer Number. The unique identifier in both QAD EA and QAD CSS. It is an integral link between the two systems.

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

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

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

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

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

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

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

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

Note This field is not currently used by the system.

Clicking a command button executes one of the following actions:

- Add saves the new record to the database. Make sure that all required fields—indicated by alternate field color—are populated before you save a record. Before saving, the system verifies that the record is unique and displays an error if it is not.
- Cancel closes the window without adding the record.

Modifying a Customer Entry

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

To modify an entry:

1. Display the record to modify.
2. Click the Customer Number link to display the edit screen.
3. Enter data into the appropriate fields. Fields that do not allow change are indicated by a second alternate color.
4. Click Save.

Customer Item Maintenance

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

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

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

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

- Create a general pool of items for all customers. In this case, there are many items and only one customer record. The information stored in the customer record is not used.
- Create a specific pool of items for each customer. In this case, there are many items and many customer records. The information associated with these customer records can include information not stored in QAD EA or override QAD EA information.

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

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

Fig. 2.14
Viewing Customer Items Through Customer Maintenance

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

Fig. 2.15
Customer Item Maintenance

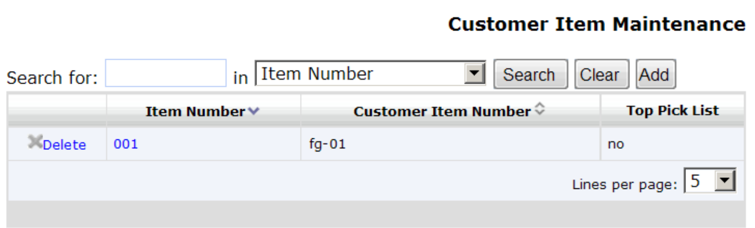


Table 2.5 summarizes the contents of the Customer Item Maintenance navigation screen.

Table 2.5
Customer Item Maintenance Navigation

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

Adding a Customer Item Entry

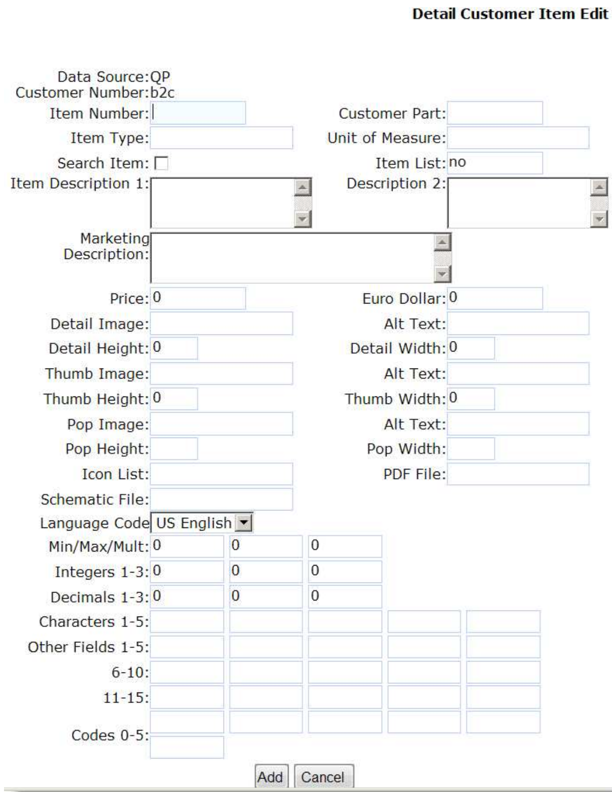
The Add function of Customer Item Maintenance lets an administrator add custom customer item records and associate them with specific QAD CSS pages.

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

To create an entry:

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

Fig. 2.16
Detail Edit Customer Items



Data Source. The domain that this customer is associated with displays.

Customer Number. Specify the number identifying the customer associated with this item. Make sure that it is a valid customer ID in both QAD EA and QAD CSS and an integral link between the two systems.

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

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

Item Type. Not currently used.

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

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

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

No: No special processing is associated with the item.

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

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

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

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

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

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

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

Detail Image. When *itemDetailPgm* is set to display `op_itemdetail.html`, this field is the relative path and file name of the item detail image file displayed on the QAD CSS item detail page.

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

Clicking a command button executes one of the following actions:

- Add saves the new record to the database. Make sure that all required fields—indicated by alternate field color—are populated before you save a record. Before saving, the system verifies that the record is unique and displays an error if it is not.

- Cancel closes the window without adding the record.

Modifying a Customer Item Entry

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

To modify an entry:

1. Display the record to modify.
2. Click the Customer Number link to display the edit screen.
3. Enter data into the appropriate fields. Fields that do not allow change are indicated by a second alternate color.
4. Click Save.

Security Group Maintenance

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

You can specify security groups in the following functions:

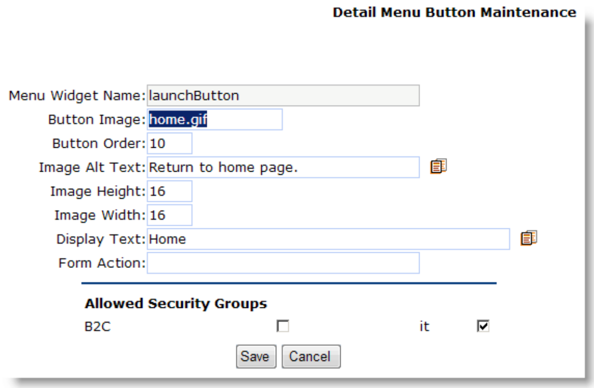
- Menu Button Maintenance
- User Maintenance
- Menu Maintenance

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

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

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

Fig. 2.17
Security Groups Applied to Maintenance Programs



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

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

Fig. 2.18
Security Group Maintenance

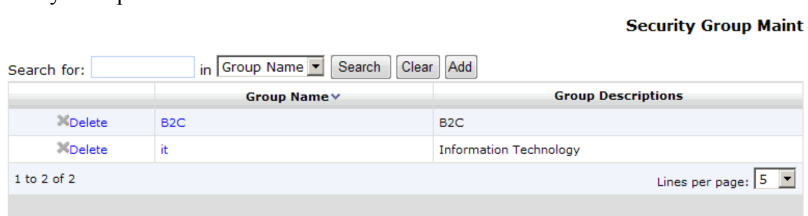


Table 2.6 summarizes the contents of the Security Group Maintenance navigation screen.

Table 2.6
Security Group Maintenance Navigation

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

Related QAD CSS functions:

- User Maintenance

Adding a Security Group

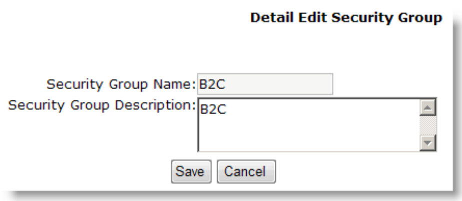
The Add function of Security Group Maintenance lets an administrator add security group profiles. A security group is an arbitrary grouping of QAD CSS functions designed to define the role of a group of users and their use of QAD CSS.

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

To create an entry:

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

Fig. 2.19
Detail Edit Security Group



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

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

Clicking a command button executes one of the following actions:

- Add saves the new record to the database. Make sure that all required fields—indicated by alternate field color—are populated before you save a record. Before saving, the system verifies that the record is unique and displays an error if it is not.
- Cancel closes the window without adding the record.

Modifying a Security Group

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

To modify an entry:

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

User Registration

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

Important Before you create the user, make sure that you verify that the customer record exists in QAD EA.

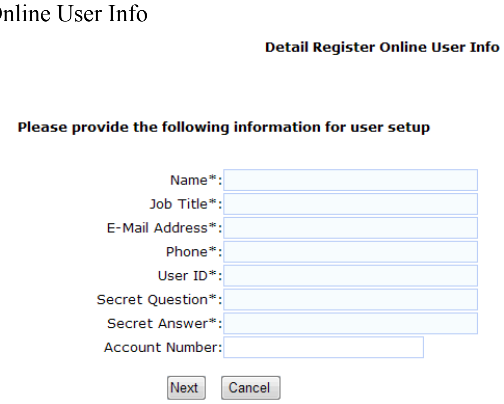
The menu location for online registration is Home Menu|Misc Menu|Register Online Start.

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

Fig. 2.20
Detail Register Online Company Info

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

Fig. 2.21
Detail Register Online User Info



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

Before an actual account is set up in QAD EA and QAD CSS, administrators use User Registration to review and verify user information.

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

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

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

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

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

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

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

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

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

Fig. 2.22
User Registration

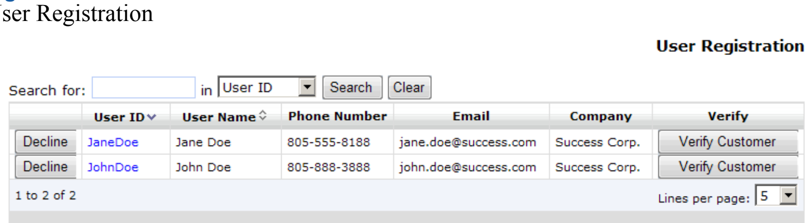


Table 2.7 summarizes the contents of the User Registration navigation screen.

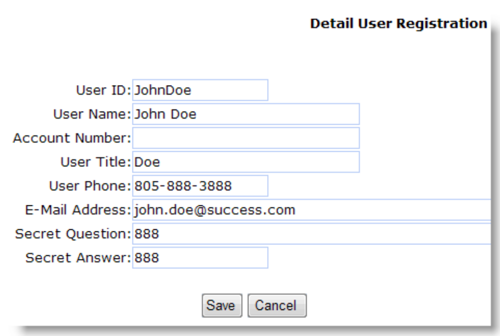
Table 2.7
User Registration Navigation

Column	Search	Search Type	Sort	Description	Link
Decline	N	n/a	N	Click to reject this user.	N
User ID	Y	Begins	Y	A unique code used to identify the user record.	Y
User Name	Y	Begins	Y	Proper name of the user requesting a user ID.	N
Phone Number	N	n/a	N	The phone number of the user.	N
E-Mail	N	n/a	N	The e-mail address of the user.	N
Company	N	n/a	N	The name of the company where the user works.	N
Verify Customer	N	n/a	N	Click Verify to indicate that you have verified that the user has specified a valid account (customer) number. The button then changes to Create User.	N
Create User	N	n/a	N	Click Create User to establish a new user record based on the online registration information.	N

Detail User Registration Editor

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

Fig. 2.23
Detail User Registration



The components of the detail user registration editor screen are:

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

User Name. Unique name of the user.

Account Number. The code representing the company defined in QAD CSS and QAD EA that this user is associated with. When the user record is created in User Maintenance, the system associated it with the specified company. You can click the Verify Company name to ensure that this account number is valid.

If the user registering does not know their company or supplied an invalid company, it is recommended that you contact them regarding their account information.

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

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

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

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

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

Clicking a command button executes one of the following actions:

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

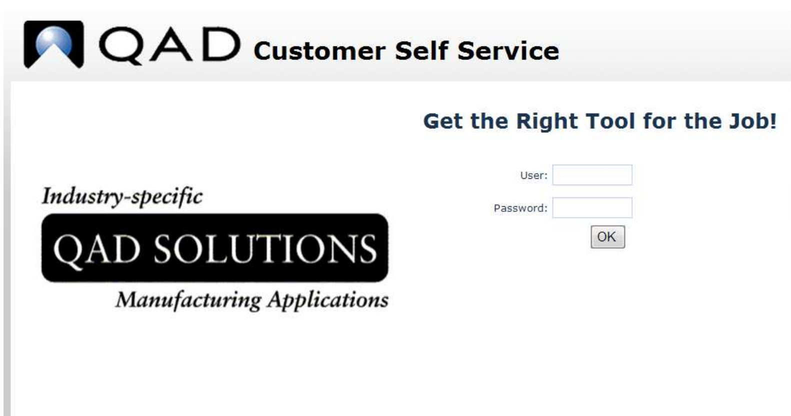
User Maintenance

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

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

Figure 2.24 illustrates how the user is prompted during login. You can customize the page, including the message content, at each installation.

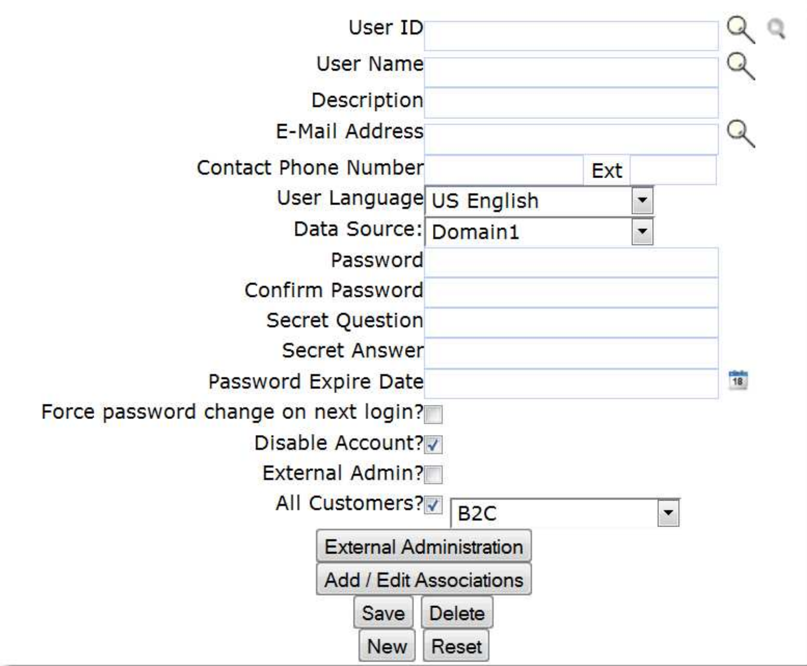
Fig. 2.24
User login



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

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

Fig. 2.25
User Maintenance



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

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

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

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

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

Contact Phone Number. Enter the contact telephone number for this user account in case it is necessary to reach the user by voice.

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

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

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

Data Source. Choose the domain that this user is associated with.

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

Note The password length depends on the *minPasswordLength* registry setting.

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

Secret Question and Secret Answer. When a forgotten password is required to be reset, the secret question and answer provided during registration can help QAD CSS and the administrator verify the identity of the user.

Password Expire Date. Specify when the user's password expires. You can click the Calendar icon to select the date from a calendar.

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

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

External Admin. Select this option to indicate that this user can access external administration functions. Set up access by clicking the External Administration button and assigning users or groups to this user. Be sure to carefully coordinate required responsibilities with user before you enable this feature.

All customers. Select this option to associate the user with all customers in CSS Customer Maintenance. When this option is selected, the user cannot add or delete any single customer manually in User Detail Maintenance.

If you select All customers, the security group in the Security Group drop-down list is used. By default, the first security group, in alphabetical order, is used. You can also select a security group from the drop-down list. The security group associated with the user determines aspects of the user interface such as which menus can be accessed. Security groups are set up in Security Maintenance.

Note Make sure that you have saved the record before proceeding to external administrator setup.

Note When a user has one customer associated but then has all customers associated, the system shows the customer selection page during the user login.

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

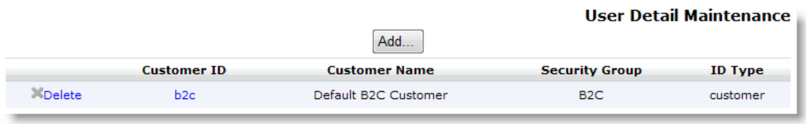
Add/Edit Associations button. This button displays the customer association screen (see Figure 2.26).

User Detail Maintenance

Administrators can add, edit, and delete customer associations. Click Add/Edit Associations to display the User Detail Maintenance screen, where any customer accounts currently associated with this user are shown.

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

Fig. 2.26
User Detail Maintenance

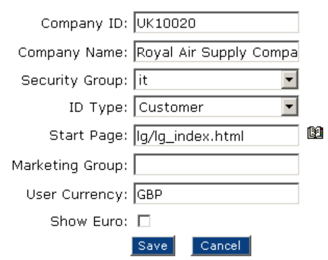


User Detail Editor

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

Important Do not overlook the potential for security breaches. Designate qualified individuals to administer this issue.

Fig. 2.27
User Detail Editor



The components of the user detail editor screen are:

Company ID. Specify the unique number that identifies the company in QAD EA to be associated with this user. The values you specify in this screen apply when the user selects this customer association during login.

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

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

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

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

- Customer, indicating an address defined in Customer Create (27.20.1.1) and set up in Customer Address Maintenance (2.1.1) in QAD EA
- Vendor, indicating an address defined in Supplier Create (28.20.1.1) and set up in Supplier Maintenance (3.1.1) in QAD EA
- Internal User, indicating an address set in User Maintenance (36.3.1)

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

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

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

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

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

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

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

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

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

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

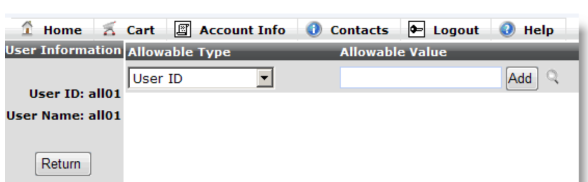
Save button. Commits the changes to the database.

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

External Administration Entries

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

Fig. 2.28
External Administration Association



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

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

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

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

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

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

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

User Master Maintenance

User Master Maintenance lets administrators or other users designated by security group view, add, modify, or delete QAD CSS user records.

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

Clicking the User Master Maintenance menu option displays the screen in Figure 2.29.

Fig. 2.29
User Master Maintenance

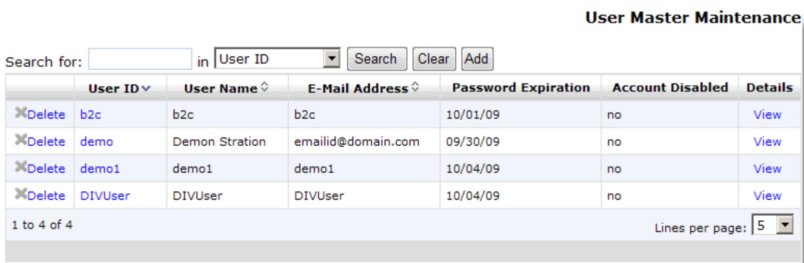


Table 2.1 summarizes the contents of the User Master Maintenance navigation screen.

Table 2.8
Address Maintenance Navigation

Column	Search	Search Type	Sort	Description	Link
User ID	Y	Begins	Y	Unique identifier of the user. Click to view user details.	Y
User Name	Y	Begins	Y	User name.	N
E-Mail Address	Y	Begins	Y	The user’s e-mail address.	N
Password Expiration	N	n/a	N	The password expiration date.	N
Account Disabled	N	n/a	N	Whether the user account is disabled.	N
Details	N	n/a	N	Click to view the User Detail Maintenance page.	Y

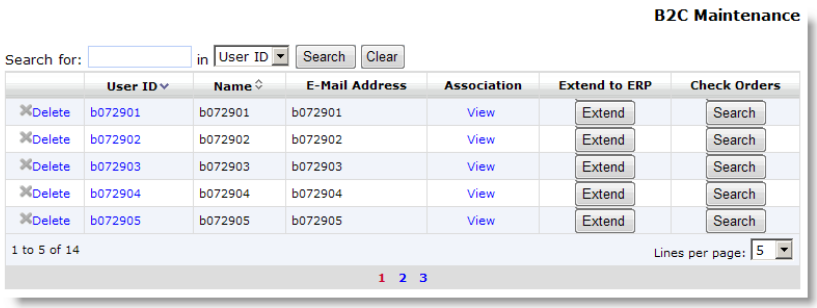
Related QAD CSS functions:

- User Detail Maintenance
- User Maintenance

B2C Maintenance

When an order is received, it can be managed by an internal CSR using B2C Maintenance in QAD CSS. This screen shows all the users associated with the B2C security group.

Fig. 2.30
B2C Maintenance



When the Extend button displays in the Extend to ERP column, the order has not yet been submitted to QAD EA. Typically the CSR would click Search in the Check Orders column to review a user's order. After the CSR clicks Search, the system displays all orders for the selected user in a browse.

Note This function is also available directly on the menu. If Post to QAD Core is No in Order Control Maintenance, this function is useful and required in a standard B2B environment for viewing order information. In this case, make sure that B2B orders have been reviewed before submission, even for existing customers.

Managing the Web Order-Entry Design

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

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

Carrier Href Maintenance

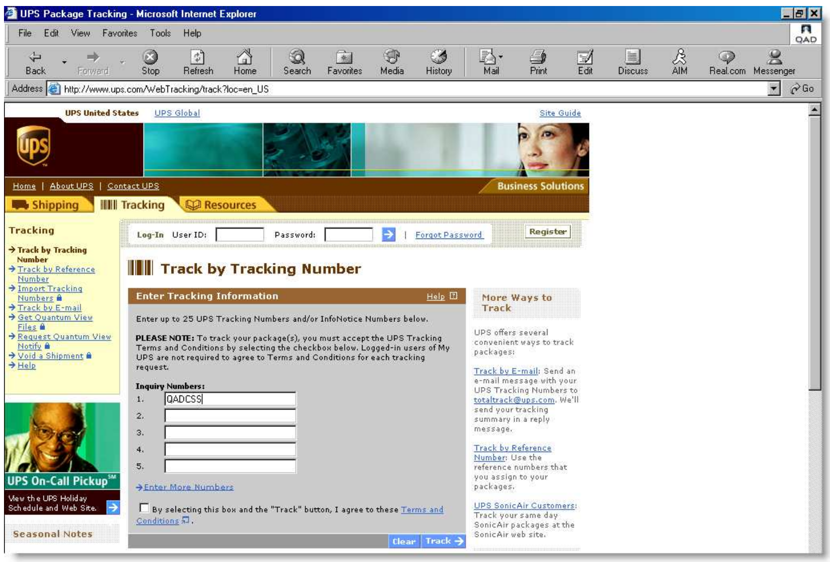
The Carrier Href Maintenance function lets administrators associate HTML links with the tracking capabilities of shipping carrier Web sites such as UPS or FedEx. The links are made available to the user in the Order Tracking Report. If a tracking number is available, the shipping carrier site offers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

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

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

Clicking the link displays the carrier's tracking page in a new browser window, as shown in Figure 2.31.

Fig. 2.31
Carrier Tracking Page

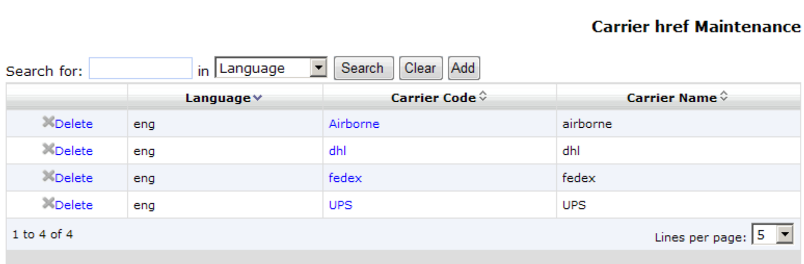


The menu location of Carrier Href Maintenance is Home Menu|Administration Menu|Carrier Href Maintenance.

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

Clicking the Carrier Href Maintenance menu option displays the screen in Figure 2.32.

Fig. 2.32
Carrier Href Maintenance



Carrier href Maintenance

Search for: in Language Search Clear Add

	Language	Carrier Code	Carrier Name
Delete	eng	Airborne	airborne
Delete	eng	dhl	dhl
Delete	eng	fedex	fedex
Delete	eng	UPS	UPS

1 to 4 of 4 Lines per page: 5

Table 2.9 summarizes the contents of the Carrier Href Maintenance navigation screen.

Table 2.9
Carrier Href Maintenance Navigation

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

Related QAD CSS functions:

- Order Tracking Report

Adding a Carrier Href Entry

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

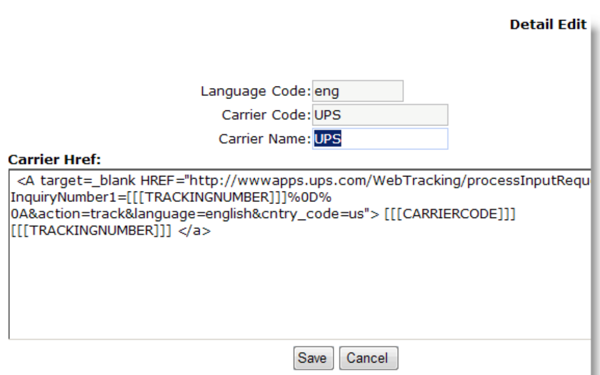
To create an entry:

1 Click Add in the navigation window to display the edit screen in Add mode.

2 Enter data into the appropriate fields.

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

Fig. 2.33
Detail Edit Carrier Href



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

Carrier Code. The QAD EA ship via code used to identify shipping companies, such as UPS.

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

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

Clicking a command button executes one of the following actions:

- Add saves the new record to the database. Make sure that all required fields—indicated by alternate field color—are populated before you save a record. Before saving, the system verifies that the record is unique and displays an error if it is not.
- Cancel closes the window without adding the record.

Modifying a Carrier Href Entry

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

To modify an entry:

1. Display the record to modify.
2. Click the Carrier Code link to display the edit screen.
3. Enter data into the appropriate fields. Fields that do not allow change are indicated by a second alternate color.
4. Click Save.

Icon Maintenance

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

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

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

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

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

Clicking the Icon Maintenance menu option displays the screen in Figure 2.34.

Fig. 2.34
Icon Maintenance

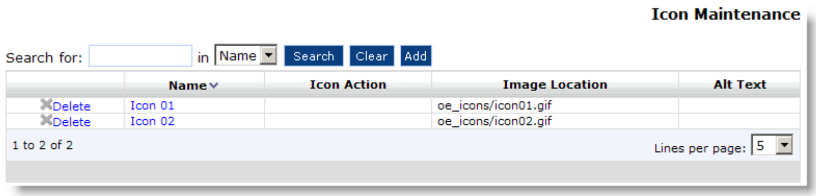


Table 2.10 summarizes the contents of the Icon Maintenance navigation screen.

Table 2.10
Icon Maintenance Navigation

Column	Search	Search Type	Sort	Description	Link
Icon Name	Y	Begins	Y	A unique identifier for this icon.	Y
Icon Action	N	n/a	N	A command that directs QAD CSS to perform a function when the icon is invoked; for example, OPEN PDF. Leave this field blank for informational icons.	N
Image Location	N	n/a	N	The path and file name of the icon image relative to the QAD CSS images directory.	N
Alt Text	N	n/a	N	Text that appears when a user's mouse moves over the icon.	N

Related QAD CSS functions:

- Action Icons Report

Adding an Icon Entry

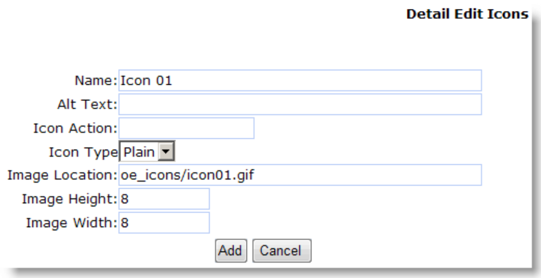
The Add function of Icon Maintenance lets an administrator add custom icons and define their use to QAD CSS. The following information is required to complete this process:

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

To create an entry:

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

Fig. 2.35
Detail Edit Icons



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

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

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

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

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

Plain: The icon is generated without associated actions.

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

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

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

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

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

Clicking a command button executes one of the following actions:

- Add saves the new record to the database in the wpro_icons table. Make sure that all required fields—indicated by alternate field color—are populated before you save a record. Before saving, the system verifies that the record is unique and displays an error if it is not.
- Cancel closes the window without adding the record.

Modifying an Icon Entry

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

To modify an entry:

1. Display the record to modify.
2. Click the Name link to display the edit screen.

3 Enter data into the appropriate fields. Fields that do not allow change are indicated by a second alternate color.

4 Click Save.

Item Layout Maintenance

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

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

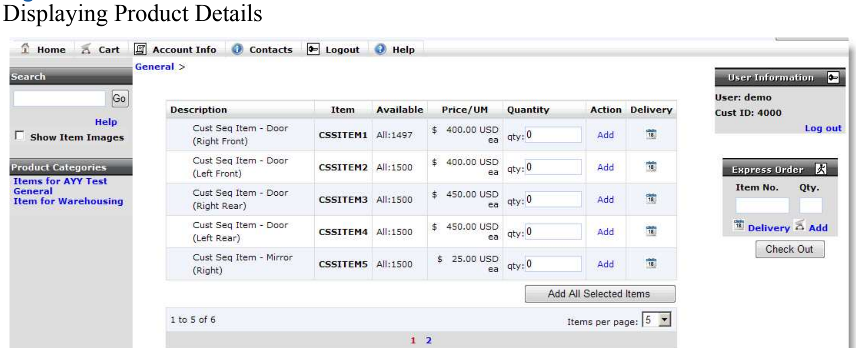
Item Layout Maintenance lets an administrator maintain predefined registry options that determine which product details are displayed. Through this function, administrators determine the pictures, descriptive text, pricing, reference, and indexing that appear on the line.

The following registry settings affect the display of this screen:

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

Figure 2.36 illustrates how the catalog appears using values defined in Item Layout Maintenance.

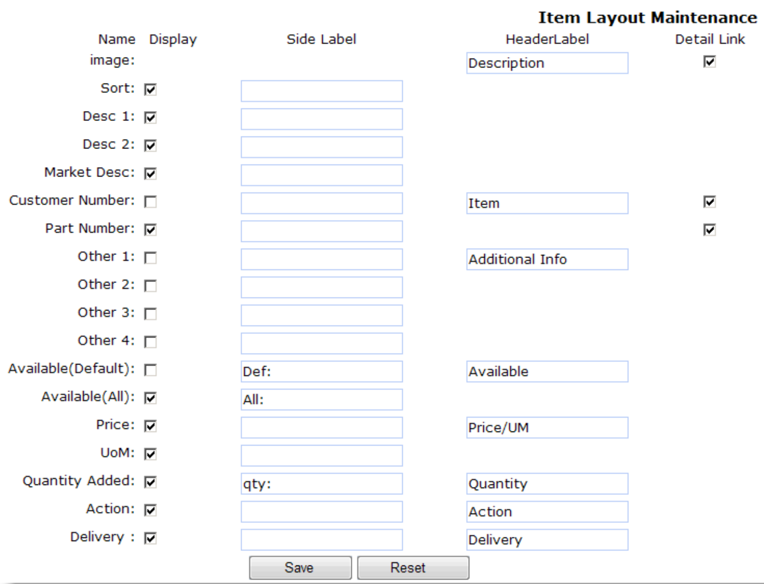
Fig. 2.36
Displaying Product Details



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

Clicking the Item Layout Maintenance menu option displays the screen in Figure 2.37.

Fig. 2.37
Item Layout Maintenance



The Item Layout Maintenance screen is arranged in columns. The name of the function (label) is followed by a check box used to turn on or off the display function. After that, the side label displays, which refer to text that will display next to the item in the catalog. The header label identifies text values that display as column headings. The detail link permits users to click through to an additional page with a more detailed description of an item.

The Item Layout Maintenance screen is arranged by columns.

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

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

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

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

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

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

The fields being managed through Item Layout Maintenance correspond to fields loaded from QAD EA using Catalog Load.

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

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

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

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

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

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

Part Number. Enabling this option displays the QAD EA item number.

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

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

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

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

Note Perhaps you do not want to display the actual quantity available that QAD EA calculates since this number does not account for outstanding orders. You probably want to determine an algorithm for adjusting the quantity that better reflects what a customer can order. You can also use the *runGetWhseQty* registry setting to manage the display of quantity available and return a text message.

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

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

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

Action. Enabling this option displays the Action column so that the user can add the item to the shopping cart.

Delivery. Enabling this option displays the Delivery column.

Save. This button commits changes to the database.

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

Related QAD CSS functions:

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

Item Types Maintenance

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

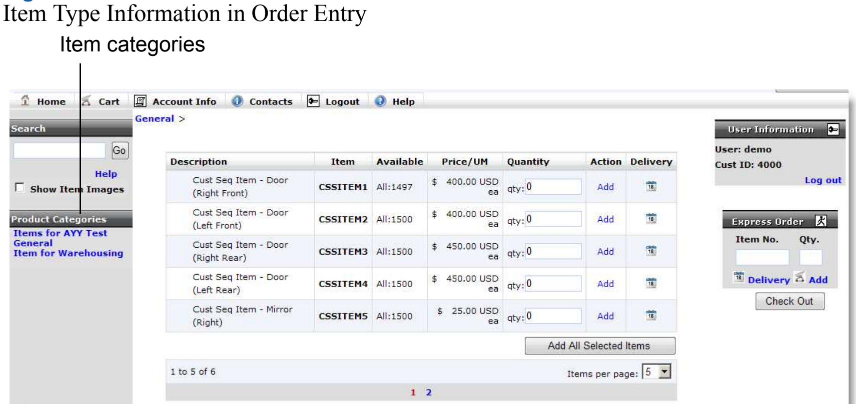
Note Item types—the same as items—are domain-specific. Make sure that you indicate which data source (domain) each category is associated with.

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

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

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

Fig. 2.38
Item Type Information in Order Entry



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

Clicking the Item Types Maintenance menu option displays the screen in Figure 2.39.

Fig. 2.39
Item Types Maintenance

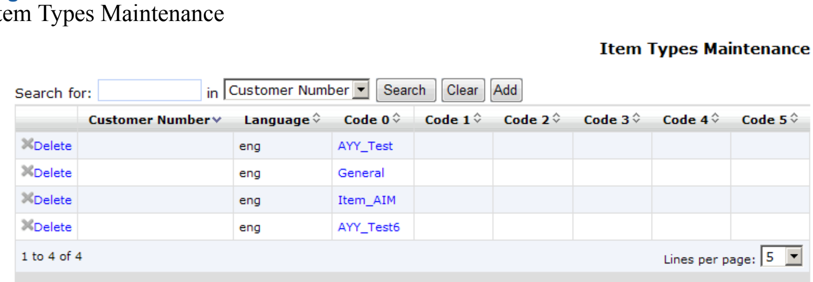


Table 2.11 summarizes the contents of the Item Types Maintenance navigation screen.

Table 2.11
Item Types Maintenance Navigation

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

Related QAD CSS functions:

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

Adding an Item Types Entry

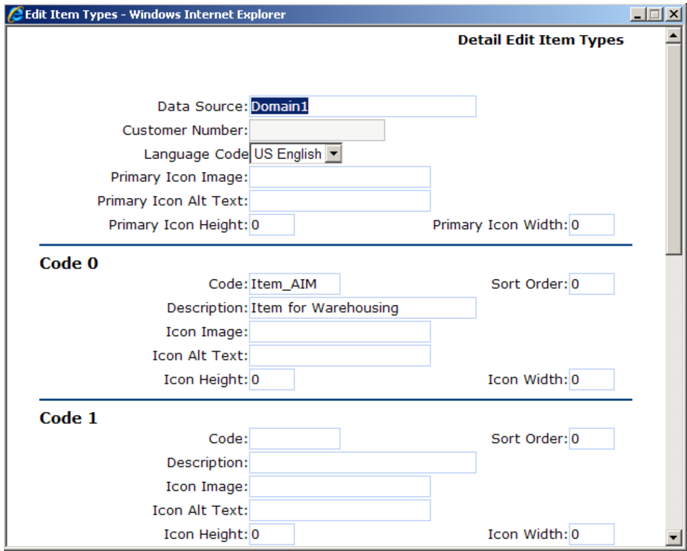
The Add function of Item Types Maintenance lets an administrator add new item category nodes to the item structure.

To create an item types entry:

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

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

Fig. 2.40
Detail Edit Item Types



Data Source. Choose the domain that this item type is associated with.

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

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

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

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

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

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

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

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

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

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

Description. The displayed text representing this category.

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

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

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

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

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

Clicking a command button executes one of the following actions:

- Add saves the new record to the database in the wpro_itemtypes table. Make sure that all required fields—indicated by alternate field color—are populated before you save a record. Before saving, the system verifies that the record is unique and displays an error if it is not.
- Cancel closes the window without adding the record.

Modifying an Item Types Entry

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

To modify an entry:

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

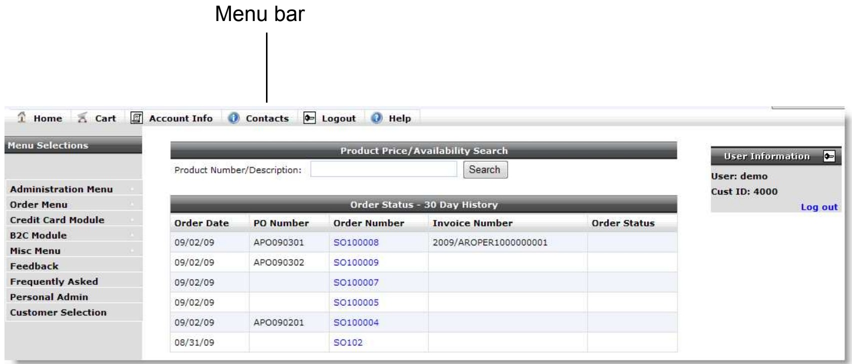
Menu Button Maintenance

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

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

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

Fig. 2.41
QAD CSS Menu Bar



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

Clicking the Menu Button Maintenance menu option displays the screen in Figure 2.42.

Fig. 2.42
Menu Button Maintenance

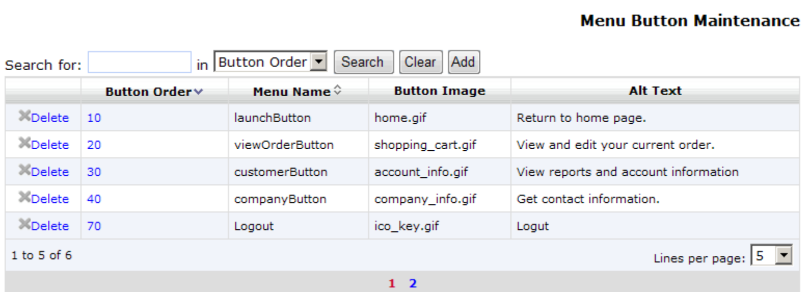


Table 2.12 summarizes the contents of the Menu Button Maintenance navigation screen.

Table 2.12
Menu Button Maintenance Navigation

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

Note Do not use spaces when creating button names to avoid possible conflicts with certain operating system configurations.

Related QAD CSS functions:

- Security Group Maintenance
- User Maintenance

- System Module Maintenance

Deleting a Button from the Menu Button Bar

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

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

To delete a menu function:

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

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

Adding a Button to the Menu Button Bar

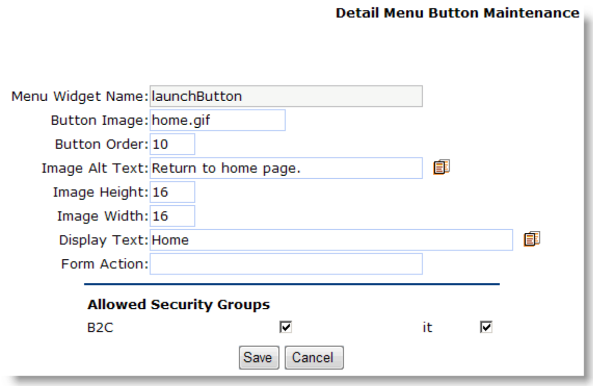
The Add function of Menu Button Maintenance lets an administrator add custom buttons and functions to the menu bar. The following information is required to complete this process:

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

To create a menu bar function:

1. Click Add in the navigation window to display the edit screen in Add mode.
2. Enter data into the appropriate fields.
3. Select each security group that can have access to this function on the menu bar. Users assigned to selected security groups can see this option. Users not assigned to selected security groups cannot see this option.
4. Click Add in the edit window to save the record.

Fig. 2.43
Detail Menu Button Maintenance



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

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

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

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

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

Image Height/Width. When set to 0 (zero), the loading optimization of the menu bar is not enabled. These values adjust the display size of the image and do not alter the actual image file.

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

Display Text. Plain text that you want to display on the new button to the right of the image.

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

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

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

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

Clicking a command button executes one of the following actions:

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

Modifying a Button on the Menu Button Bar

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

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

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

To modify a menu bar function:

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

Menu Maintenance

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

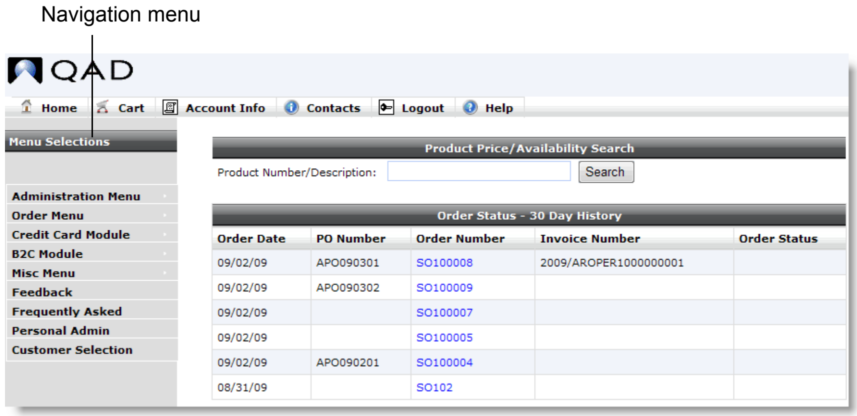
Administrators can add modules, remove them, and reorder the available menu options. You can also create headers and new hierarchies as needed.

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

Many other features of the menu system are determined by registry settings defined in System Registry Maintenance. Appendix A,“System Registry Fields” provides details about these settings.

Note It is the task of QAD Global Services to create functions that do not appear in the menu system. Creating and organizing the menus is the last detail in developing new functions.

Fig. 2.44
QAD CSS Navigation Menu



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

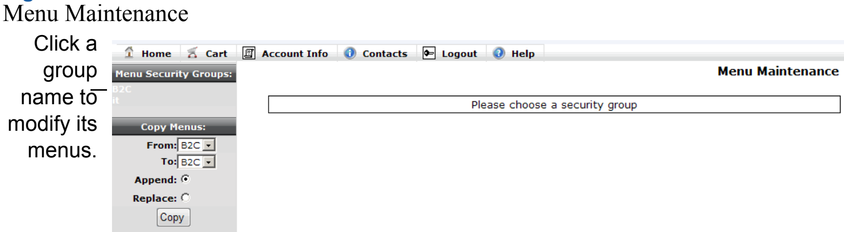
The Menu Maintenance function is initially loaded with a full set of menus. The function is designed to streamline data entry by letting you copy that structure and tailor it for other groups. After you make a copy for a security group, you can remove the menus that they have no right to access and reorganize the others as needed.

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

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

Clicking the Menu Maintenance menu option displays the screen in Figure 2.45.

Fig. 2.45
Menu Maintenance



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

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

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

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

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

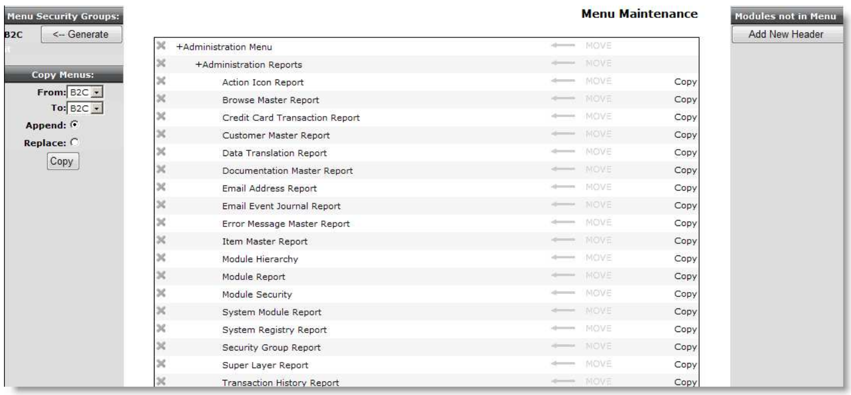
Append: Append the menu setup to the existing menu structure.

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

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

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

Fig. 2.46
Menu Organization Screen



The specific components found on this screen are:

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

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

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

Menu generation is carried out for all licensed languages.

Delete. Deletes the record of the corresponding row.

Note The record is now displayed under the Modules rather than on Menu list, unless it has been physically removed from the system using System Module Maintenance.

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

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

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

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

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

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

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

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

Moving Menu Entries

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

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

Adding a Menu Entry

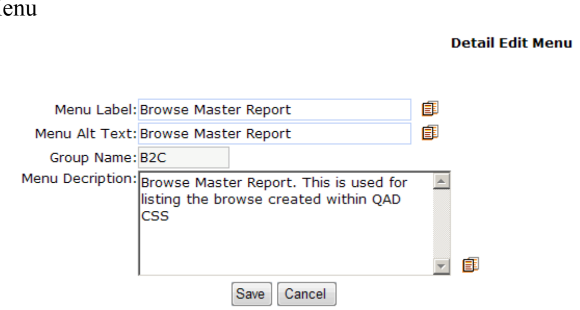
The Add New Header function of Menu Maintenance lets an administrator add custom menu options documents and associate them with specific QAD CSS pages.

To create an entry:

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

Clicking a menu item from Menu Maintenance displays the screen in Figure 2.47.

Fig. 2.47
Detail Edit Menu



The components of the menu edit screen are:

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

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

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

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

Clicking a command button executes one of the following actions:

- Save commits the record to the database.
- Cancel returns to the menu selection screen without changing the database.

Modifying a Menu Entry

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

To modify an entry:

1. Display the record to modify.
2. Click the menu link to display the edit screen.
3. Enter data into the appropriate fields. Fields that do not allow change are indicated by a second alternate color.
4. Click Save.

Specials Maintenance

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

Note Specials—as well as the items they reference—are domain specific. Make sure that you indicate which data source (domain) each special is associated with.

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

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

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

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

Fig. 2.48
Specials Maintenance

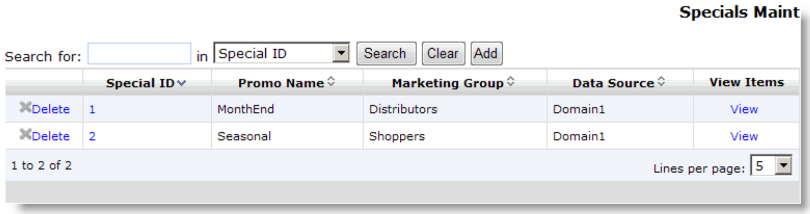


Table 2.13 summarizes the contents of the Specials Maintenance navigation screen.

Table 2.13
Specials Maintenance Navigation

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

Related QAD CSS functions:

- Order Entry 2
- User Maintenance

Adding a Specials Entry

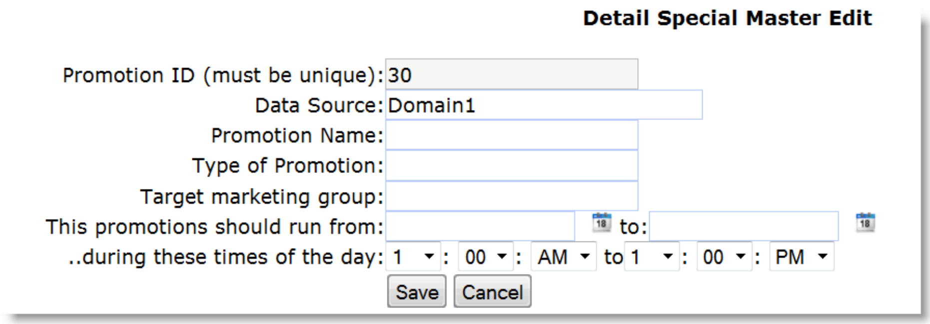
The Add function of Specials Maintenance lets an administrator add custom specials documents and associate them with specific QAD CSS pages. The following information is required to complete this process:

- The name and number of the new promotion
- The data source that identifies the domain with the items on the special
- The type of promotion and the valid target marketing group
- The dates and times to run the promotion

To create an entry:

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

Fig. 2.49
Detail Special Master Edit



Promotion ID. Enter a unique identifier for this promotion.

Data Source. Choose the domain that this special is associated with.

Promotion Name. Enter the descriptive name of the promotion.

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

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

This Promotion should run from/To. The date range of the promotion. Promotions can be scheduled to appear at a future date. Click the Calendar icon to select dates.

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

Clicking a command button executes one of the following actions:

- Add saves the new record to the database. Make sure that all required fields—indicated by alternate field color—are populated before you save a record. Before saving, the system verifies that the record is unique and displays an error if it is not.
- Cancel closes the window without adding the record.

Modifying a Specials Entry

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

To modify an entry:

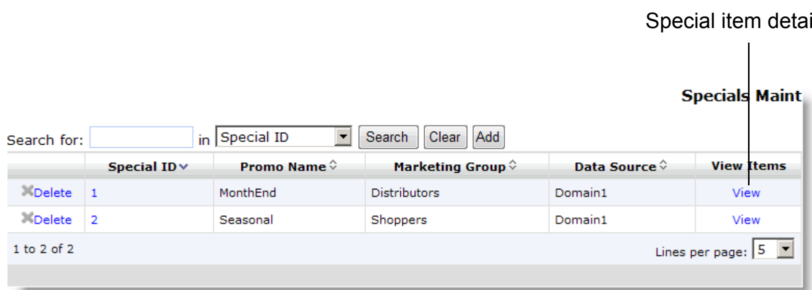
1. Display the record to modify.
2. Click the Special ID link to display the edit screen.
3. Enter data into the appropriate fields. Fields that do not allow change are indicated by a second alternate color.
4. Click Save.

Special Detail Maintenance

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

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

Fig. 2.50
Viewing Promotional Items Through Specials Maintenance



Clicking a View link displays the screen in Figure 2.51.

Fig. 2.51
Special Detail Maintenance

Table 2.14 summarizes the contents of the Special Detail Maintenance navigation screen.

Table 2.14
Special Detail Maintenance Navigation

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

Adding a Special Detail Entry

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

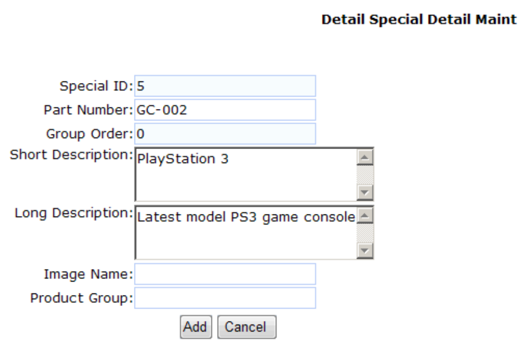
To create an entry:

1 Click Add in the navigation window to display the edit screen in Add mode.

2 Enter data into the appropriate fields.

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

Fig. 2.52
Detail Special Detail Maint



Special ID. A read-only field, which displays a unique identifier for this promotion.

Part Number. Specify the item number as defined in QAD EA.

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

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

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

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

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

Clicking a command button executes one of the following actions:

- Add saves the new record to the database. Make sure that all required fields—indicated by alternate field color—are populated before you save a record. Before saving, the system verifies that the record is unique and displays an error if it is not.
- Cancel closes the window without adding the record.

Modifying a Special Detail Entry

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

1. Display the record to modify.
2. Click the Order link to display the edit screen.
3. Enter data into the appropriate fields. Fields that do not allow change are indicated by a second alternate color.
4. Click Save.

Replacement Item Maintenance

Item replacement lets the customer place orders for item B as a substitution for item A when the original item A is no longer available. Replacement items are defined in Item Replacement Maintenance (1.23.1) in QAD EA and are not required to be loaded into QAD CSS using Catalog Load.

See *QAD Sales User Guide* for detailed information on defining replacement items.

Up-Sell Item Maintenance

Up-sell items are replacement items or assemblies that an upgrade or a level above the requested item in the item's product structure when the requested item is not available during order entry. Up-sell items are defined in Item Up-Sell Maintenance (1.23.5) in QAD EA and are not required to be loaded into QAD CSS using Catalog Load.

See *QAD Sales User Guide* for detailed information on defining up-sell items.

Cross-Sell Item Maintenance

Cross-sell items are items in addition to the item being ordered. Cross-sell items are typically complementary products to the requested item but do not replace the item being ordered. Cross-sell items are defined in Item Cross-Sell Maintenance (1.23.7) in QAD EA and are not required to be loaded into QAD CSS using Catalog Load.

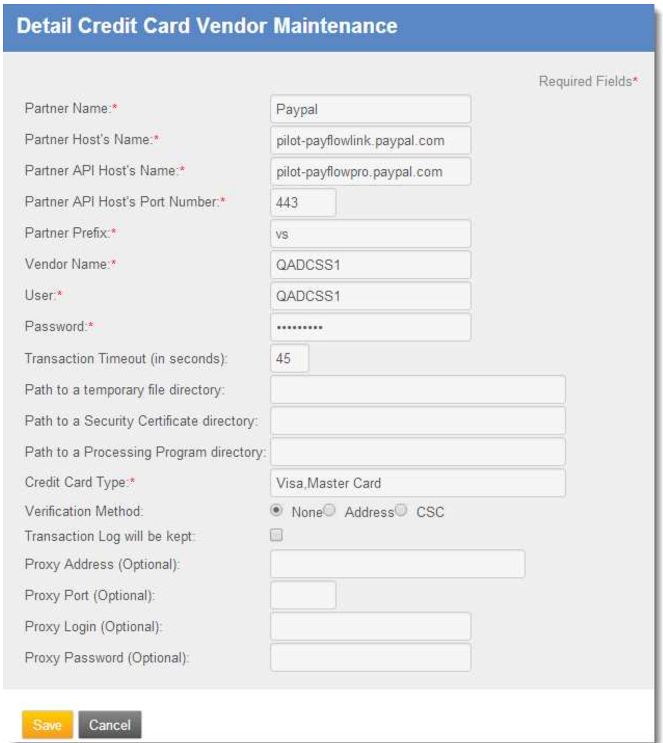
See *QAD Sales User Guide* for detailed information on defining cross-sell items.

Credit Card Vendor Maintenance

You can use Credit Card Vendor Maintenance in QAD CSS to define attributes of the credit card integration. Then QAD CSS can invoke the processing tools that the service has defined and you have selected to handle your credit card transactions.

Important The values that you specify in this function must match the corresponding values in the `VeriSign.ini` file, defined during installation. The `VeriSign.ini` file is referenced by QAD EA functions and the values specified in Credit Card Vendor Maintenance are referenced by QAD CSS. To prevent processing errors, make sure that they stay the same.

Fig. 2.53
Credit Card Vendor Maintenance



Partner Name. Specify the name of the company that you are using for processing credit card transactions. Currently set this field to Paypal.

Partner Host's Name. Specify the host server name supplied by your credit card processing company. API uses this value when transactions are sent to be authorized.

- Currently, for test transactions, set this field to `pilot-payflowlink.paypal.com`.
- Currently, for live transactions, set this field to `payflowlink.paypal.com`.

Partner API Host's Name. Specify the API host name supplied by your credit card processing company.

- Currently, for test transactions, set this field to `pilot-payflowpro.paypal.com`.
- Currently, for live transactions, set this field to `payflowpro.paypal.com`.

Partner API Host's Port Number. Specify the port number supplied by your credit card processing company. API uses this number when transactions are sent to be authorized. Currently set this field to 443.

Partner Prefix. Specify a prefix that represents your credit card processing service; for example, specify the vs prefix for VeriSign. This prefix is used to locate the appropriate QAD CSS error message to display for VeriSign error codes. This feature lets you customize the content of the error message displayed to users based on your business requirements, rather than displaying the VeriSign return code description directly.

Use QAD CSS Error Message Maintenance to modify message text if needed.

Example The error code 12 is returned by VeriSign. The system constructs a message ID based on the credit card module ID (cc), Partner Prefix (vs), and return code (0012). It then looks for a message with the ID ccvs0012 in the QAD CSS message table and displays that message content to the user.

Separate messages are set up in QAD CSS for most of the possible error codes that the credit card vendor system can return, detailing the specific error reasons. If such detailed information is not necessary, you can modify the messages.

Since messages perhaps does not exist in QAD CSS for all possible return codes, a default message ID of ccvs000x is supplied with the system. If the system receives a VeriSign return code that is not registered, it displays the message content associated with the default error code. The system also sends an e-mail containing detailed error information to the CSR, based on e-mail event EX070.

Important Do not delete the ccsv000x message, since it is the system default.

Vendor Name. Specify the name that identifies you to your credit card processing service. This name is the one by which you do business on the Internet. You specify this name when you complete the application to use the processing partner’s services.

User. Specify the user name that identifies you to your credit card processing company.

Password. Specify the secure password associated with the user previously entered. The password is required for transmitting credit card transactions.

Note Currently, you are required to have a Payflow Payment Gateway account. The vendor name here corresponds to your login name of Payflow Payment Gateway. And the user corresponds to the user under the login account. Multiple users can share one login account. To sign up for a Payflow Payment Gateway account, go to:

https://www.paypal.com/webapps/mpp/payflow-payment-gateway

In setting up the services for your Payflow Gateway account, make sure of the following:

- On the Service Settings|Hosted Checkout Pages|Set Up page, the *Enable Secure Token* field is set to Yes.
- For partial shipment processing, the *Allow reference transactions* field on the Account Administration|Manage Security page is set to Yes.

For more information on setting up the services, refer to the documentation that the credit card processing service provides.

Transaction Timeout. Specify the number of seconds that could be allowed for a credit card authorization to complete. It is typically set to 30 seconds. If the transaction does not complete within this time, an error is displayed.

Credit Card Type. Enter a comma-delimited list of credit card types that users can specify when placing an order. Valid choices are: VISA, MASTERCARD, AMERICAN EXPRESS, and DISCOVER. If spaces are entered between values, the system ignores them.

Verification Method. Specify whether or not to use a verification method and if so, which method to use.

- None

  Do not use any verification method.
- Address

Communicate Address Verification Service (AVS) codes with your credit card processing partner.

AVS is a credit card fraud prevention tool designed specifically for ordering environments in which the customer is not physically present to show identification. It allows mail order and electronic commerce merchants to verify addresses by comparing a portion of the billing address from the order with the cardholderís address data. Note that not all merchant banks use AVS codes.

When this option is selected, an additional screen displays during credit card payment that lets the user view and update billing address information to be sent with the credit card transaction.

- CSC

  Communicate Credit Security Codes (CSC) with your credit card processing partner.

  Credit Security Code is a three or four-digit number that appears on the credit card and provides a cryptographic check of the information embossed on the card.

  When this option is selected, an additional field displays during credit card payment that lets the user enter a Credit Security Code to be sent with the credit card transaction.

Transaction Log will be kept. Indicate whether a log of transaction activity is kept in the wpro_cc_log table in QAD CSS. When this field is Yes, you can view the transactions maintained in the system using Credit Card Transaction Report on the Administration menu. See "Credit Card Transaction Report" on page 201.

The four Proxy fields are currently not implemented.

Managing Orders

Order Processing

The Order Processing function lets administrators or customer sales representatives view detailed order history and manage orders.

Clicking the Order Processing menu option displays the screen in Figure 2.54.

Fig. 2.54
Order Processing

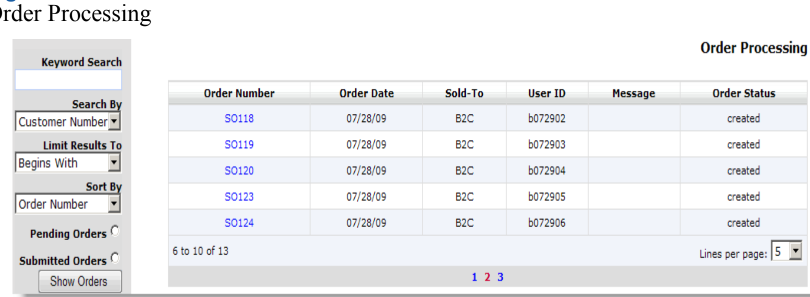


Table 3.1 summarizes the contents of the Order Processing navigation screen.

Table 2.15
Order Processing Navigation

Column	Search	Search Type	Sort	Description	Link
Order Number	N	n/a	Y	Unique identifier in both QAD EA and QAD CSS.	Y
Order Date	N	n/a	N	The date on which the order was placed.	N
Sold-To	N	n/a	N	The customer number of the customer who placed this order.	N
User ID	N	n/a	N	A unique code used to identify the user record.	N
Message	N	n/a	N	Message associated with this order.	N
Order Status	N	n/a	N	The processing status of this order.	N

To process an order, click the order number.

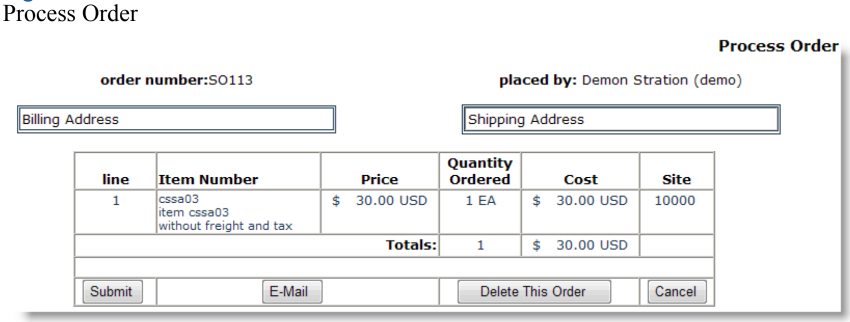
Related QAD CSS functions:

- All order processing administration reports
- All internal order reports

Process Order

Use the Process Order page to view detailed order information, submit the order on behalf of the customer, send notification e-mail to customers, and delete the order.

Fig. 2.55
Process Order



This screen offers four choices:

Submit. Click this button to send the order information to QAD EA. Successfully posting the order creates a QAD EA sales order and customer record and removes the order from QAD CSS. The status of the posted order becomes submitted.

E-Mail. Click this button to send a message to the e-mail address associated with the order customer. This option is typically used when the order review discloses a problem with the order. Perhaps the item is on back order, or the address is invalid. You can send a message directly to the individual informing them of the problem so it can be corrected.

Delete This Order. Click this option to remove the order without processing. When customers cancel orders due to some reasons—for example, items are not available immediately—this action can be necessary.

Cancel. Click this button to return to the previous screen.

Managing Administrative Tasks

This section describes general administrative functions:

- Saved Report Maintenance
- Session Maintenance
- System Registry Maintenance

Saved Report Maintenance

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

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

Clicking the Saved Report Maintenance menu option displays the screen in Figure 2.56.

Fig. 2.56
Saved Report Maintenance

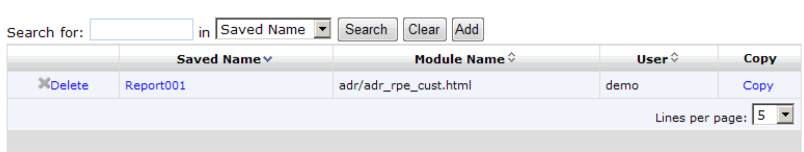


Table 2.16 summarizes the contents of the Saved Report Maintenance navigation screen.

Table 2.16
Saved Report Maintenance Navigation

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

Related QAD CSS functions:

- All QAD CSS reports

Adding a Saved Report Entry

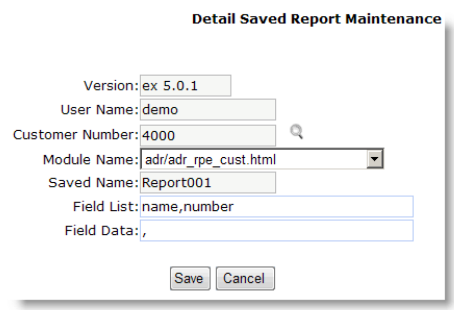
The Add function of Saved Report Maintenance lets an administrator save a defined set of report search criteria.

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

To create an entry:

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

Fig. 2.57
Detail Saved Report Maintenance



Version. QAD CSS version for the saved report.

User Name. Unique identifier for a user. Only this user can view this saved report from the report navigation screen.

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

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

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

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

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

Clicking a command button executes one of the following actions:

- Add saves the new record to the database. Make sure that all required fields—indicated by alternate field color—are populated before you save a record. Before saving, the system verifies that the record is unique and displays an error if it is not.
- Cancel closes the window without adding the record.

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

Modifying a Saved Report Entry

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

To modify an entry:

1. Display the record to modify.
2. Click the Saved Name link to display the edit screen.
3. Enter data into the appropriate fields. Fields that do not allow change are indicated by a second alternate color.
4. Click Save.

Copying a Saved Report Entry

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

To copy an entry:

1. Display the record to modify.
2. Click the Copy link to display the edit screen.
3. Modify data in the appropriate fields. Make sure that you update the Saved Name field.
4. Click Save in the edit window to save the record.

Session Maintenance

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

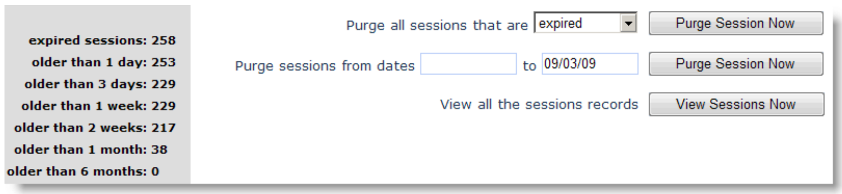
The Session Maintenance function lets administrators view all session records and their related transactions. Administrators are able to monitor sessions and terminate active or abandoned sessions. It is recommended to periodically review and purge abandoned sessions records.

Session detail can be important in diagnosing and troubleshooting issues that users report.

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

Clicking the Session Maintenance menu option displays the screen in Figure 2.58.

Fig. 2.58
Session Maintenance



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

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

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

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

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

Purging Session Records

There are three methods of purging session records.

Important Purging an active session leads to the termination of a user's connection.

Method 1: Purge all sessions that are expired

1 Select a range of sessions from the drop-down menu (1 day old, 3 days old, 1 week old, 2 weeks old, 1 month old, or 6 months old).

2 Click the adjacent Purge Session Now button. A confirmation window displays.

3 Click OK to delete the corresponding session and all related records from the session table.

Method 2: Purge all sessions for a specific date range

1 Enter a valid from date.

2 Verify the to date.

3 Click the adjacent Purge Session Now button. A confirmation window displays.

4 Click OK to delete the corresponding records from the session table.

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

The system automatically select abandoned sessions to delete.

Important The display line that is presented in bold represents the administrator currently operating this function. Do not delete this line. Otherwise, the system immediately terminates your session.

Clicking View Sessions Now displays the screen shown in Figure 2.59.

Fig. 2.59
Viewing All Session Records

Note The currently active session is in bold.

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

This screen displays a list of sessions with columns as described in Table 2.17.

Table 2.17
Sorting Session Records

Column	Description
Delete check box	A check identifies this session record for deletion.
Session ID	A unique identifier for this session. This link generates a summary transaction report for this session.
User ID	The login user ID.
Customer Number	The last selected customer number value that the user chooses.
Page Visited	The last QAD CSS module visited.
Access Date/Time	The last date and time the session record was updated.

To delete records from the session view list:

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

Fig. 2.60
Selection Confirmation

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

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

Related QAD CSS functions:

- Transaction History Report

System Registry Maintenance

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

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

Customizing Settings

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

Each user always has at least three IDs:

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

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

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

- Customer groups are assigned to customers in Customer Maintenance. If settings are defined by customer group, the user inherits the group from the customer value.

- Marketing groups can be assigned to users in User Maintenance. Users can be associated with more than one marketing group. Marketing groups are used to implement special promotions, which can be targeted to one or more marketing groups. Welcome messages can also be tailored for one or more marketing groups.

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

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

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

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

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

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

Example You want to tailor the setting of *indexOrderHome* for members of the B2C security group. You already have a value tailored for customer group Retail. In this scenario, set the Override field to Yes on the registry setting for Retail, so that the system continues searching until it finds the setting for security group B2C. Set the Override field to No on the security group setting to ensure that this value is used even when values are also set for customer number or user ID. Also set the Override field to Yes for the records with no ID to ensure that the system looks for your custom settings.

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

Important Avoid deleting global registry keys.

System Registry Screen Details

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

Clicking the System Registry Maintenance menu option displays the screen in Figure 2.61.

Fig. 2.61
System Registry Maintenance

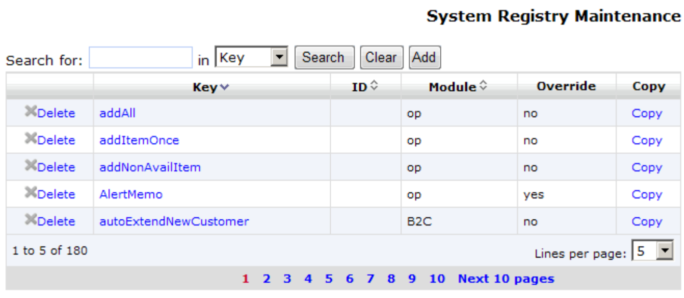


Table 2.18 summarizes the contents of the System Registry Maintenance navigation screen.

Table 2.18
System Registry Maintenance Navigation

Column	Search	Search Type	Sort	Description	Link
Key	Y	Begins	Y	A system registry key name.	Y
ID	Y	Begins	Y	The link between the registry key value and the QAD CSS business rule. • Blank: Specifies a global registry key. • Nonblank: Represents a custom override of registry value.	N
Module	Y	Begins	Y	Defines a group of registry keys related to QAD CSS product modules: • B2C – Business-to-Customer • OP – Order Processing • CC – Credit Card • SYS – Core QAD CSS	N
Override	N	n/a	N	Determines whether the system continues to look for a matching value for this key (Override Yes) or stop with this value (Override No).	N
Copy	N	n/a	N	Duplicates the existing key to easily create new registry keys.	Y

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

Related QAD CSS functions:

- System Registry Report

Adding a New Registry Key

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

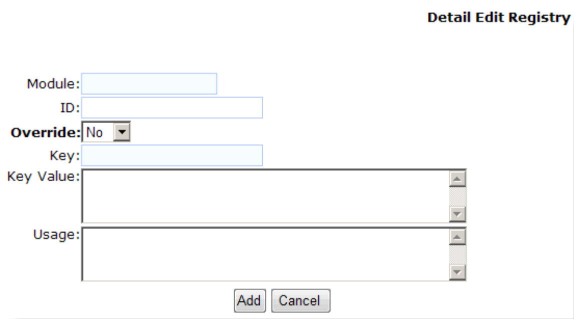
To create a registry key:

1 Click Add in the navigation window to display the Detail Edit Registry screen in Add mode.

2 Enter data into the appropriate fields.

3 Click Add to commit this function.

Fig. 2.62
Detail Edit Registry



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

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

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

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

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

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

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

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

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

Key. The system registry key name.

Key Value. Value of the registry key.

Usage. A help text description of registry usage.

Clicking a command button executes one of the following actions:

- Add saves the new record to the database in the wpro_registry table. Make sure that all required fields—indicated by alternate field color—are populated before you save a record. Before saving, the system verifies that the record is unique and displays an error if it is not.
- Cancel closes the window without adding the record.

Modifying a System Registry Key

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

To modify a registry key:

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

Copying a System Registry Key

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

To copy a system registry key:

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

Chapter 3

System Control

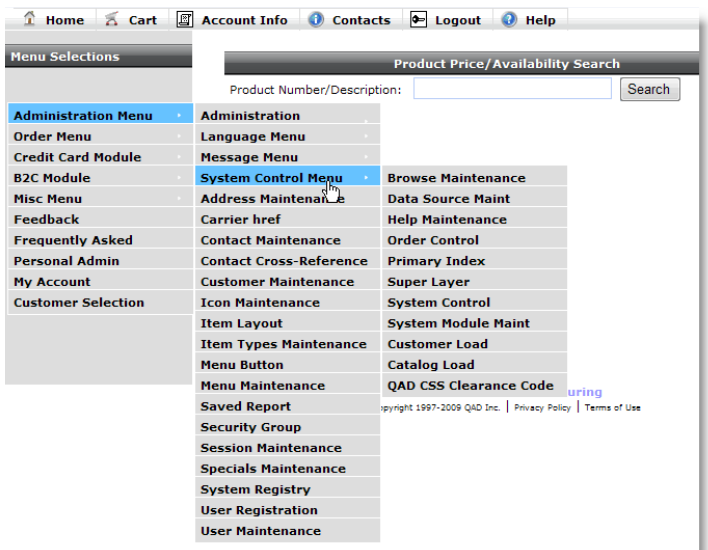
This chapter describes the use of QAD CSS functions that control internal system processing and integration with external systems.

Introduction

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

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

Fig. 3.1
QAD CSS System Control Menu



System control functions include:

- Browse Maintenance is used to edit and configure QAD CSS browses.
- Data Source Maintenance defines valid domains for items and customers.
- Dynamic Temp-Table Map (dtmap) Maintenance defines data forms that provide communication between the objects in each tier of the QAD CSS platform.
- Order Control provides a series of global configuration options to drive the business rule processing of order entry.
- Primary Index establishes primary key definitions for QAD CSS maintenance modules and internal data translation relationships
- Super Layer Maintenance allows developers and implementers to establish the architectural layers of common procedures and functions and their relationship to each other.
- System Control provides a series of global configuration options to drive the internal system processing of QAD CSS.
- System Module Maintenance sets the attributes that control the appearance and behavior of QAD CSS modules.

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

- Catalog Load lets implementors load item information exported from QAD EA using an Excel spreadsheet.

- Customer Load lets implementors load customer information exported from QAD EA using an Excel spreadsheet.

See "Menu Maintenance" on page 70 for details on menu setup and security.

- QAD CSS Clearance Code lets administrators view clearance information for their implementation of QAD CSS.

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

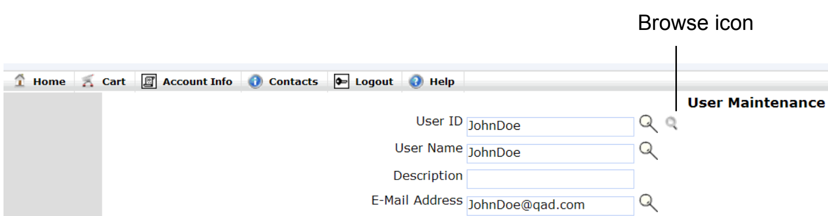
Note Consider restricting access to authorized administrators or individuals with the specific responsibility for setting up system options.

Browse Maintenance

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

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

Fig. 3.2
Browse Function in User Maintenance Fields



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

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

Fig. 3.3
Browse Maintenance

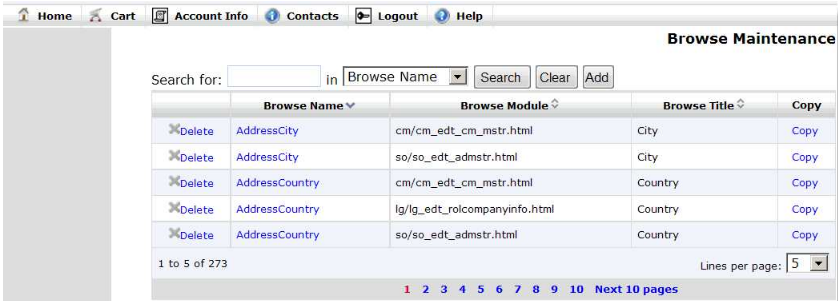


Table 3.1 summarizes the contents of the Browse Maintenance navigation screen.

Table 3.1
Browse Maintenance Navigation

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

Related QAD CSS functions:

- Browse Master Report on page 185
- Security Group Maintenance on page 41
- Menu Button Maintenance on page 66
- Menu Maintenance on page 70
- System Module Maintenance on page 117

Adding a Browse Entry

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

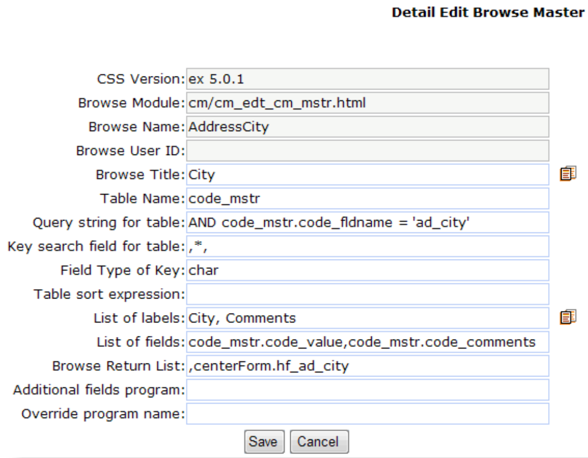
To create an entry:

1 Click Add in the navigation window to display the edit screen in Add mode.

2 Enter data into the appropriate fields.

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

Fig. 3.4
Detail Edit Browse Master



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

Browse Module. Name of the page where the browse icon appears.

Browse Name. Unique name for the browse.

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

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

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

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

Key search field for table. Field name. Text from the browse is applied to find this field.

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

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

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

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

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

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

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

Clicking a command button executes one of the following actions:

- Add saves the new record to the database. Make sure that all required fields—indicated by alternate field color—are populated before you save a record. Before saving, the system verifies that the record is unique and displays an error if it is not.
- Cancel closes the window without adding the record.

Modifying a Browse Entry

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

To modify an entry:

1 Display the record to modify.

2 Click the Browse Name link to display the edit screen.

See field descriptions starting on page 99.

3 Enter data into the appropriate fields. Fields that do not allow change are indicated by a second alternate color.

4 Click Save.

Data Source Maintenance

The Data Source Maintenance function lets administrators define the valid domains that can be associated with users and items. Each domain represents a single business operation with distinct operational requirements and settings. Although a QAD EA database can have any number of domains, you probably want to place orders through QAD CSS that affect only a subset of these domains.

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

Clicking the Data Source Maintenance menu option displays the screen in Figure 3.5.

Fig. 3.5
Data Source Maintenance

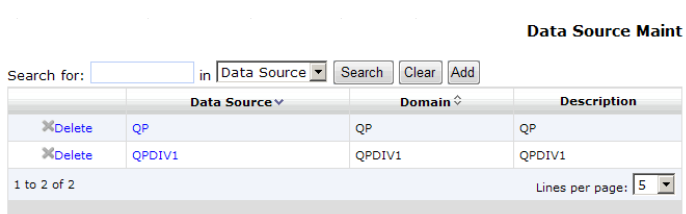


Table 3.2 summarizes the contents of the Data Source Maintenance navigation screen.

Table 3.2
Data Source Maintenance Navigation

Column	Search	Search Type	Sort	Description	Link
Data Source	Y	Begins	Y	Name of the data source.	Y
Domain	Y	Begins	Y	QAD EA domain associated with this data source.	N
Description	N	n/a	N	Description of the data source.	N

You can specify a data source on the following QAD CSS functions:

See page 23.
- Address Maintenance

See page 31.
- Contact Cross-Reference Maintenance

See page 33.
- Customer Maintenance

See page 36.
- Customer Item Maintenance

See page 63.
- Item Types Maintenance

See page 74.
- Specials Maintenance

See page 47.
- User Maintenance

See page 173.
- Order Archive Report

In addition, you specify a domain when loading data with Customer Load and Catalog Load. These programs are described in *QAD Customer Self Service Implementation Guide*.

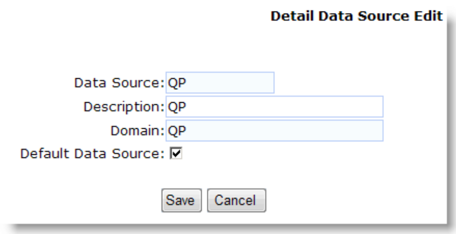
Adding a Data Source Entry

You can set up one data source for a domain.

To create a data source for a domain:

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

Fig. 3.6
Detail Data Source Edit



Data Source. Specify a code (maximum 8 characters) that identifies a data source. To avoid confusion, you may want to name your data sources the same as the QAD EA domains that they represent.

Description. Specify a brief description (maximum 24 characters) of this data source to display in lookups.

Domain. Specify the name of a domain in the QAD EA database to be associated with this data source.

Default Data Source. Select this field for the data source you want the system to use when a default associated with the currently logged in user cannot be found.

Note This situation cannot possibly occur in normal processing, because in normal processing, each user is associated with a data source.

Clicking a command button executes one of the following actions:

- Add saves the new record to the database. Make sure that all required fields—indicated by alternate field color—are populated before you save a record. Before saving, the system verifies that the record is unique and displays an error if it is not.
- Cancel closes the window without adding the record.

Note There can be only one data source for one domain.

Modifying a Data Source Entry

The Modify function of Data Source Maintenance lets an administrator modify existing data source entries. Requirements for adding a record are the same as for editing a record.

To modify an entry:

1. Display the record to modify.
2. Click the Data Source link to display the edit screen.

See field descriptions starting on page 102.

3. Enter data into the appropriate fields. Fields that do not allow change are indicated by a second alternate color.
4. Click Save.

QAD

Dynamic Temp-Table Map Maintenance

The QAD CSS platform is designed as an N-tier modular architecture. The message component provides communication between the objects in each tier. Each message is defined as data forms (Progress temp tables). Dynamic Temp-Table Map Maintenance lets developers define those data forms.

Note Dynamic Temp-Table Map Maintenance is a developer-specific maintenance function in QAD CSS. A thorough understanding of QAD CSS development methodology is recommended before changing this section.

By default, this program is not available on the menu system. To add it, complete these steps:

1. Change the setting of On Menu in System Module Maintenance to Yes.
2. Use Menu Maintenance to add the program where you want it in the system. Make sure that you assign the correct security.

Clicking the dtmap Maintenance menu option displays the screen in Figure 3.7.

Fig. 3.7
Dynamic Temp-Table Map (dtmap) Maintenance

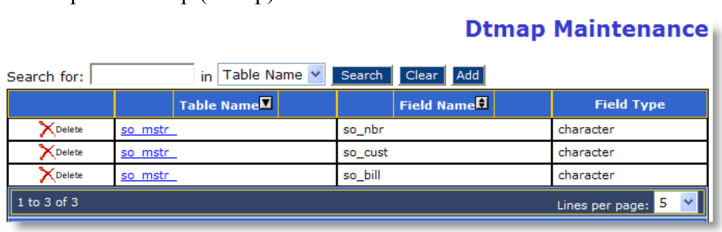


Table 3.3 summarizes the contents of the Dynamic Temp-Table Map Maintenance navigation screen.

Table 3.3
Dynamic Temp-Table Map (dtmap) Maintenance Navigation

Column	Search	Search Type	Sort	Description	Link
Table Name	Y	Begins	Y	The data form name.	Y
Field Name	Y	Begins	Y	The field name in the data form.	N
Field Type	N	n/a	N	The data type definition of the field, such as character, integer.	N

Adding a Dynamic Table Map Entry

The Add function of Dynamic Table Map Maintenance allows a developer to add data forms. The data form design is required to complete this process.

To create an entry:

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

Fig. 3.8
Detail Edit dtMap

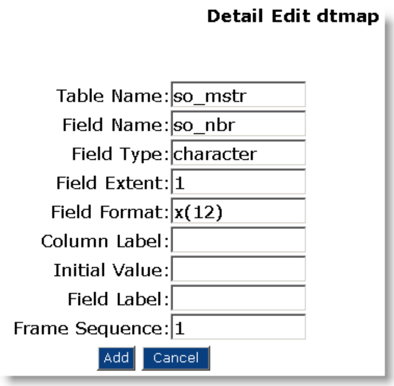


Table Name. The data form name.

Field Name. The field name in the data form.

Field Type. The data type definition of the field; for example, character, integer.

Field Extent. The number of entries in an array structure. A value greater than 1 specifies this data field as an array.

Field Format. Display format that specifies the default display attributes of this data field.

Column Label. Default column heading label for this data field.

Initial Value. Initial value for this data field.

Field Label. Default label for this data field.

Frame Sequence. The field order of this data field in relation to the other data fields in the data form. This field is only editable when in Add mode.

Clicking a command button executes one of the following actions:

- Add saves the new record to the database. Make sure that all required fields—indicated by alternate field color—are populated before you save a record. Before saving, the system verifies that the record is unique and displays an error if it is not.
- Cancel closes the window without adding the record.

Modifying a Dynamic Table Map Entry

The Modify function of Dynamic Table Map Maintenance lets an administrator modify existing dynamic table map entries. Requirements for adding a record are the same as for editing a record.

To modify an entry:

1. Display the record to modify.
2. Click the Table Name link to display the edit screen.

See field descriptions starting on page 104.

3. Enter data into the appropriate fields. Fields that do not allow change are indicated by a second alternate color.

4 Click Save.

Order Control Maintenance

Every QAD CSS order-entry process can be controlled using a series of global configuration options. These options drive the business rule processing of order entry. For example, some options affect access to QAD CSS order-entry features, while others affect how QAD CSS interacts with QAD EA.

Note These options are typically set during product implementation. If you want to change the setup, carefully plan the changes beforehand and review them after they are done, because any change can affect the way customers interact with the site.

See *QAD Customer Self Service Implementation Guide* for additional details about defining your order-entry process.

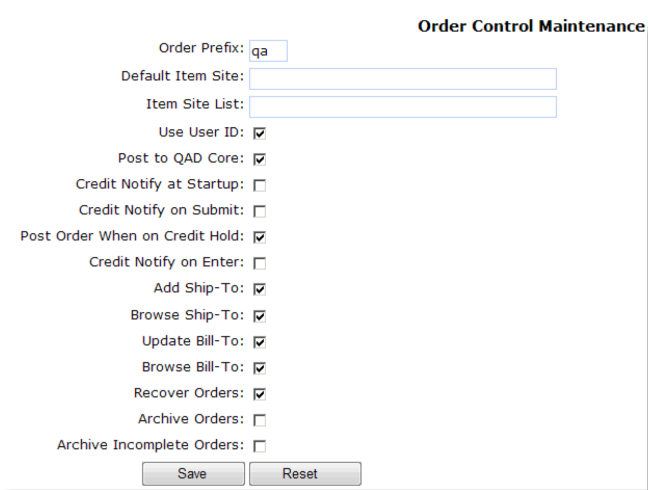
Global configuration options—specifically, billing and shipping address update and browse—have an impact on components on this QAD CSS page.

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

Note Consider restricting access to individuals with the specific responsibility of controlling the QAD CSS order processing business rules.

Clicking the Order Control Maintenance menu option displays the screen in Figure 3.9.

Fig. 3.9
Order Control Maintenance



The key screen components of the Order Control Maintenance navigation screen are:

Order Prefix. Specify a prefix for the sales order number. By using a different prefix from the one specified in Sales Order Control (7.1.24) in QAD EA, you can easily identify orders that were placed using QAD CSS.

Default Item Site. Permits QAD CSS to override the default site that QAD EA assigns.

Item Site List. Permits QAD CSS to override a default list of allowable sites. This field is not used with QAD EA.

See page 221.

Use User ID. This instructs QAD CSS to use the QAD CSS user ID to identify the actual user who placed the order within QAD EA. See also the description of the *useUserID* registry setting.

Post to QAD Core. Determines if orders are immediately posted to QAD EA after the buyer enter them in QAD CSS.

Yes: Orders are immediately posted to QAD EA after the buyer enter them in QAD CSS.

No: A CSR must use Order Processing to review and then submit the pending orders. To notify the CSR about the pending orders, custom programming is required to store appropriate e-mail addresses in QAD EA. The QAD CSS system provides an e-mail event (EX073) to support your custom programming.

See “Error Message Maintenance” on page 151.

Credit Notify on Startup. QAD CSS is able to notify the user that their account is on credit hold. QAD EA determines whether the customer is on credit hold. Upon account login, the credit hold notification message is displayed if the account is on credit hold and this option is selected. The notification message is maintained in Error Message Maintenance.

See “Error Message Maintenance” on page 151.

Credit Notify on Submit. QAD CSS has the ability to notify the user that their account is on credit hold. QAD EA determines whether the customer is on credit hold. Upon submission of an order, the credit hold notification message is displayed if the account is on credit hold and this option is selected. The notification message is maintained in Error Message Maintenance.

Post Order When on Credit Hold. This field instructs QAD CSS to post an order to QAD EA, regardless of customer credit hold status.

Credit Notify on Enter. QAD CSS is able to notify the user that their account is on credit hold. QAD EA determines whether the customer is on credit hold. Upon starting an order, the credit hold notification message is displayed if the account is on credit hold and this option is selected.

See “Error Message Maintenance” on page 151.

The notification message is maintained in Error Message Maintenance.

Add Ship-To. This field indicates that customers can add new ship-to addresses during the order-entry process. New addresses are posted for storage in QAD EA.

Browse Ship-To. This field indicates that customers can select from existing ship-to addresses during the order-entry process. This list can contain addresses from QAD EA, QAD CSS, or both.

Update Bill-To. This field indicates that customers can update bill-to addresses during the order-entry process. Modified addresses are posted for storage in QAD EA.

Browse Bill-To. This field indicates that customers can select from existing bill-to addresses during the order-entry process. This list can contain addresses from QAD EA, QAD CSS, or both.

Note Only one bill-to address is associated with a QAD EA customer. Therefore, do not update the bill-to field. Further, all new and modified ship-to addresses are stored as new temporary addresses in the QAD EA application.

Recover Orders. When it is set to Yes, QAD CSS saves the order and all line items as they are entered, line by line. If the user exits an order by mistake or loses a network connection while entering the order, the system prompts them at the next login to resume where they were interrupted, or to begin a new order-entry session.

See "Uncommitted Orders Report" on page 174.

The Uncommitted Orders Report produces a list of all incomplete and uncommitted orders. Administrators can then view and delete all orders available for recovery.

Note It is recommended that you keep this feature selected.

See "Order Archive Report" on page 173.

Archive Orders. After an order is communicated to QAD EA, the system deletes it. When Archive Orders is Yes, the system keeps a copy of each order in a side table in QAD CSS after it is sent to QAD EA. Archived orders can be viewed and are listed on the Order Archive Report.

See page 208.

Note You can use the system registry setting *deleteOrder* to prevent the system from deleting orders for certain users, regardless of the setting of Archive Orders.

Archive Incomplete Orders. When it is set to Yes, the system archives even those orders that were not completed. None of these orders can be in QAD EA. Incomplete archived orders can be viewed and are listed on the Order Archive Report.

This feature is helpful to track marketing issues.

Clicking a command button executes one of the following actions:

- Save commits the changes to the database.

  Note Restart the Progress WebSpeed agents before the changes can go into effect.

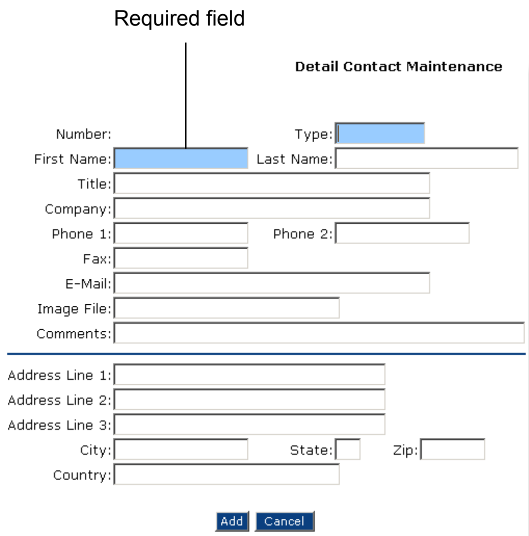
- Reset returns all fields to the state before any changes.

Primary Index Maintenance

A primary index is a key value that identifies a database record as unique. QAD CSS stores primary index information in an internal database table for use in application development. The Primary Index Maintenance function lets developers establish primary key definitions for QAD CSS maintenance modules and internal data translation relationships. Values set up in Primary Index Maintenance must match the primary index in the physical database schema. This information is stored in a separate QAD CSS table to improve system performance and efficiency.

Figure 3.10 shows an example of how Primary Index Maintenance is integrated into Contact Maintenance. The Detail Contact Maintenance screen shows the primary index field in blue as a required field.

Fig. 3.10
Primary Index Information in Contact Maintenance



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

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

Clicking the Primary Index Maintenance menu option displays the screen in Figure 3.11.

Fig. 3.11
Primary Index Maintenance

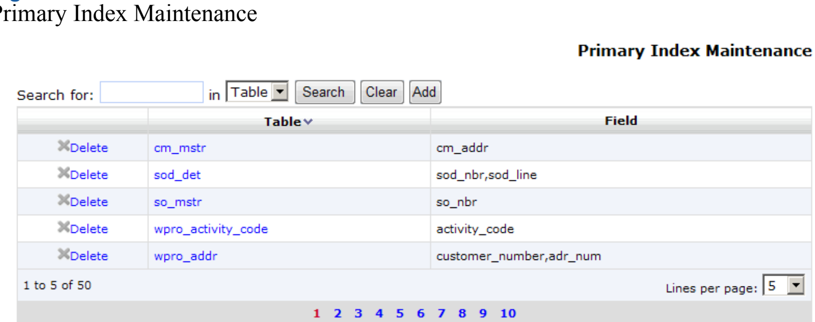


Table 3.4 summarizes the contents of the Primary Index Maintenance navigation screen.

Table 3.4
Primary Index Maintenance Navigation

Column	Search	Search Type	Sort	Description	Link
Table	Y	Contains	Y	A word used to designate a database table. This table must exist in the QAD EA database.	Y
Field	N	n/a	N	A word used to designate a database table element. This field must exist in the QAD EA database table.	N

Related QAD CSS functions:

See page 195.

- System Registry Report

Adding a Primary Index Entry

The Add function of Primary Index Maintenance lets an administrator add custom primary index documents and associate them with specific QAD CSS pages.

To create an entry:

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

Fig. 3.12
Detail Edit Primary Index

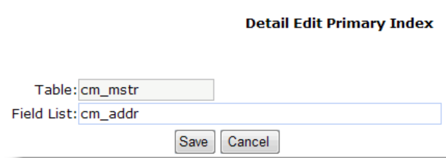


Table. A word used to designate a database table. This table must exist in the QAD CSS database.

Field List. A word used to designate a database table element. This field must exist in the QAD CSS database table.

Clicking a command button executes one of the following actions:

- Add saves the new record to the database. Make sure that all required fields—indicated by alternate field color—are populated before you save a record. Before saving, the system verifies that the record is unique and displays an error if it is not.
- Cancel closes the window without adding the record.

Modifying a Primary Index Entry

The Modify function of Primary Index Maintenance lets an administrator modify existing primary index entries. Requirements for adding a record are the same as for editing a record.

To modify an entry:

1. Display the record to modify.
2. Click the Table link to display the edit screen.

See field descriptions starting on page 110.

3. Enter data into the appropriate fields. Fields that do not allow change are indicated by a second alternate color.
4. Click Save.

Super Layer Maintenance

The QAD CSS application is a collection of procedures and functions. Common procedures and functions are grouped together as architectural layers and loaded persistently on a server. The order in which these layers are loaded affects the way the application behaves and operates. Super Layer Maintenance allows developers and implementers to establish the layers and their relationships to each other.

For some system administrators, they are required to use Super Layer Maintenance during installation or upgrades of QAD CSS modules.

Important Use this function only when you implement a new module or function. Remove it from the menu as soon as you finish the implementation.

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

Clicking the Super Layer Maintenance menu option displays the screen in Figure 3.13.

Fig. 3.13
Super Layer Maintenance

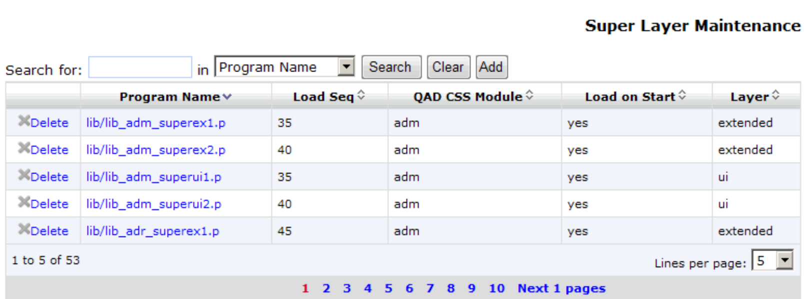


Table 3.5 summarizes the contents of the Super Layer Maintenance navigation screen.

Table 3.5
Super Layer Maintenance Navigation

Column	Search	Search Type	Sort	Description	Link
Program Name	Y	Begins	Y	The physical file name of the QAD CSS program.	N
Load Sequence	Y	Equals	Y	Order that the corresponding program is loaded into the layer.	N

QAD

Column	Search	Search Type	Sort	Description	Link
QAD CSS Module	Y	Equals	Y	QAD CSS category code used to group related functions.	N
Load on Start	Y	Begins	Y	Instructs QAD CSS to load this module into the layers upon system startup.	N
Layer	Y	Equals	Y	The layer where the corresponding program is placed: • Extended • User Interface • Adapter	N

Related QAD CSS functions:

See page 197.

- Super Layer Report

Adding a Super Layer Entry

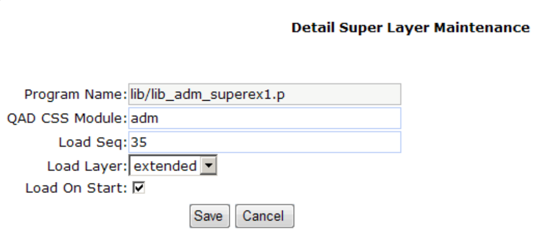
The Add function of Super Layer Maintenance lets an administrator add custom super layer documents and associate them with specific QAD CSS pages. The following information is required to complete this process:

- The name and module of the super layer
- The load sequence and layer
- Whether this super layer is to load on start of the QAD CSS agents

To create an entry:

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

Fig. 3.14
Detail Super Layer Maintenance



Program Name. The physical file name of the QAD CSS program.

QAD CSS Module. QAD CSS category code used to group related functions.

Load Sequence. Order that the corresponding program is loaded into the layer.

Load Layer. Specify the layer where the corresponding program is placed. Choices are:

- Extended

- User Interface
- Adapter

Load on Start. Instructs QAD CSS to load this module into the layers upon system startup.

Clicking a command button executes one of the following actions:

- Add saves the new record to the database. Make sure that all required fields—indicated by alternate field color—are populated before you save a record. Before saving, the system verifies that the record is unique and displays an error if it is not.
- Cancel closes the window without adding the record.

Modifying a Super Layer Entry

The Modify function of Super Layer Maintenance lets an administrator modify existing super layer entries. Requirements for adding a record are the same as for editing a record.

Important Make sure that you understand the effects before you modify an existing super layer entry.

To modify an entry:

1 Display the record to modify.

2 Click the Program Name link to display the edit screen.

See field descriptions starting on page 112.

3 Enter data into the appropriate fields. Fields that do not allow change are indicated by a second alternate color.

4 Click Save.

System Control Maintenance

Core QAD CSS system processes can be controlled using a series of global configuration options. These options drive the internal system processing of QAD CSS. For example, some options and settings define the location or locations of images and style sheets, e-mail attributes, session information, transaction tracking, and more.

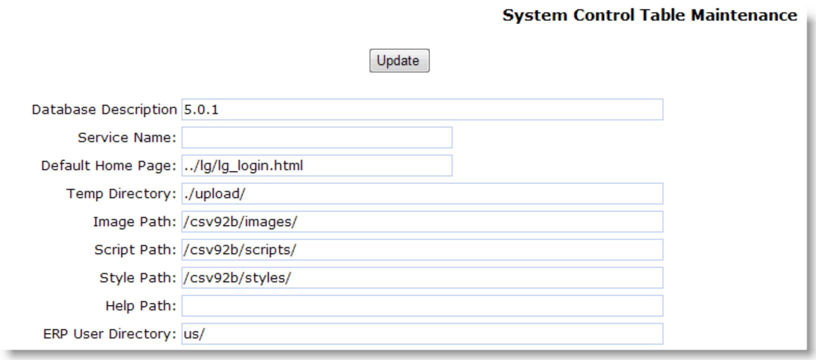
Note These options are typically set during product implementation. If you want to change the setup of these options, make sure that you carefully plan the changes beforehand and review them after they are done, because they affect the operation of QAD CSS.

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

Note Consider restricting access to system implementers and those people who are responsible for the technical setup of QAD CSS.

Clicking the System Control Maintenance menu option displays the screen in Figure 3.15. (Additional parts of this screen are shown in Figure 3.16 on page 115 and Figure 3.17 on page 116.)

Fig. 3.15
System Control Table Maintenance, Part 1



The key screen components of the System Control Maintenance navigation screen are:

Update button. Commits changes to the database.

Note Restart the Progress WebSpeed agents before the changes can go into effect.

Database Description. Text used to define this specific implementation. This text generally appears in the upper right corner of the QAD CSS screen; for example, QAD CSS 4.

Service Name. This field is not used in QAD CSS and should be left blank.

Default Home Page. The system default page displayed when a page request is denied and QAD CSS cannot determine what page to display.

Temp Directory. The physical location that QAD CSS uses to write temporary information during the operation of the Web site. This directory is on the operating system where the Progress WebSpeed agents reside. Make the directory path end with a slash or backslash, whichever is appropriate to the operating system.

You enter information for three directories: images, scripts, and style sheets. In all cases, you can enter an absolute URL or a relative one. Entering a relative URL can prevent the display of security-related messages when the path is accessed from a secured page.

Note Make sure that the directory path end with a slash (/) in all cases.

Image Path. The virtual directory on the Web server where the QAD CSS images reside. For example, this directory can be defined as:

- An absolute URL (http://www.server.com/images/)
- A relative URL (/images/)

Note The value of this field is set by the *images* registry setting.

Script Path. The virtual directory on the Web server where the QAD CSS JavaScript files reside. For example, this directory can be defined as:

- An absolute URL (http://www.qadcss.com/scripts/)
- A relative URL (/scripts/)

Style Path. The virtual directory on the Web server where the QAD CSS HTML style sheets reside. For example, this directory can be defined as:

- An absolute URL (http://www.qadcss.com/styles/)

- A relative URL (/styles/)

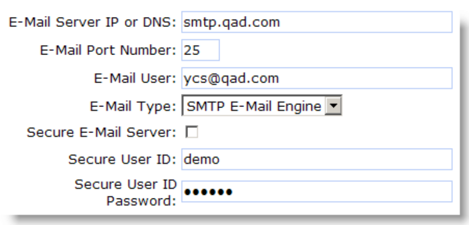
Note The value of this field is set by the *styles* registry setting.

Help Path. The virtual directory on the Web server where the QAD CSS HTML help files reside. For example, this directory can be defined as:

- An absolute URL (http://www.qadcss.com/help/)
- A relative URL (/help/)

ERP User Directory. The directory where QAD EA source code is located. For a US English installation, the directory is `MFGPROInstallDir/US/`.

Fig. 3.16
System Control Table Maintenance, Part 2



E-Mail Server IP or DNS. The TCP/IP or Domain Name Server (DNS) address of the e-mail server used to route e-mail messages generated by QAD CSS.

E-Mail Port Number. Port number of the SMTP server that is listening for e-mail. The default is 25.

E-Mail User. The authorized e-mail account used to access the e-mail server.

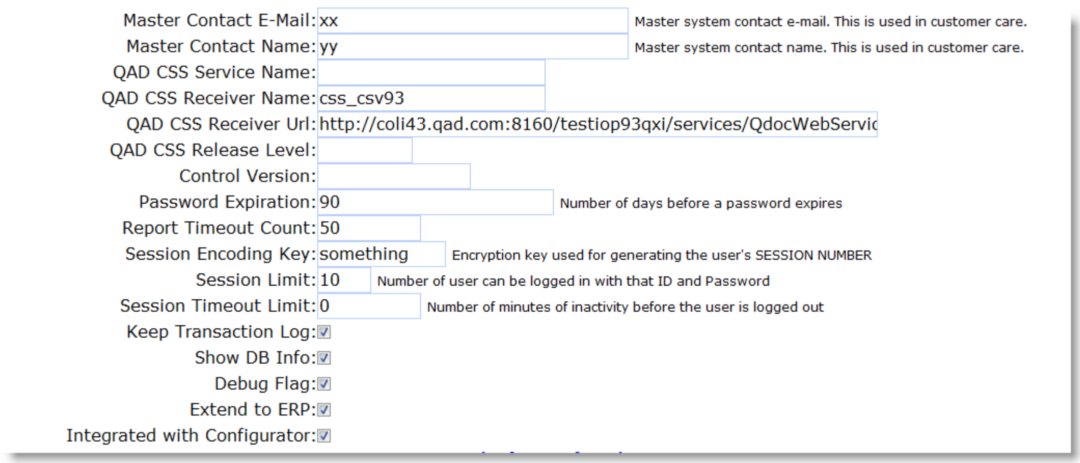
E-Mail Type. The e-mail engine for processing e-mail, either SMTP or SendMail.

Secure E-Mail Server. This field instructs QAD CSS to use the secure SMTP protocol when communicating with the e-mail server. Activating this option requires use of Secure User ID and Secure User ID Password.

Secure User ID. The secured user ID required to access the e-mail server. This field is only required when Secure E-Mail Server is activated.

Secure User ID Password. The secured user ID password required to access the e-mail server. This field is only required when Secure E-Mail Server is activated.

Fig. 3.17
System Control Table Maintenance, Part 3



Master Contact E-Mail. Specify the e-mail address of the administrator to receive system-generated e-mail messages. Currently, the only message automatically sent to this address notifies the administrator when the QAD CSS license is about to expire.

Master Contact Name. Specify the name of the user associated with the master contact e-mail address.

QAD CSS Service Name. This field is not currently used. Leave it blank.

QAD CSS Receiver Name. Enter a QXtend receiver name for the QAD EA Server.

QAD CSS Receiver URL. Enter the QXtend receiver URL.

QAD CSS Release Level. Release number of QAD CSS. Do not change the value of this field.

Control Version. A value used within QAD CSS to identify version- specific operations. Do not change the value of this field.

Password Expiration. The number of days, relative to the last password change event, that the new password is valid. Set this value to 0 (zero) to not use this option.

Report Timeout Count. A value that represents the number of rows to count in a report before executing a Progress buffer flush that sends part of the report results back to the user’s browser. It is designed to prevent a timeout condition in long-running reports.

Session Encoding Key. A component of encryption key used to generate session numbers.

Session Limit. Limits the number of active, concurrent sessions for a QAD CSS user account.

Session Timeout Limit. The number of minutes before QAD CSS deactivates a session due to inactivity. A value of 0 (zero) indicates that sessions do not time out. In a production environment, the value of 0 is not recommended.

See “Transaction History Report” on page 198.

Keep Transaction Log. Select this option when you want QAD CSS to log all Web site activity to a journal. You can view and clear this information using Transaction History Report.

Show DB Info. Select this option when you want QAD CSS to display the information from the database description field in the header of QAD CSS screens.

Debug Flag. Select this option when you want QAD CSS to capture additional technical information useful during development and Web site analysis.

Important Do not operate in debug mode in a production environment.

Extend to ERP. Select this option to connect QAD CSS to the QAD EA database. This option is selected by default and is supposed to be always selected for CSS to work.

Integrated with Configurator. Select this option to enable QAD CSS for items defined with the rules-based Configurator (optional product). This option is selected by default.

System Module Maintenance

The foundation of the QAD CSS user interface is HTML pages. QAD CSS refers to these HTML pages as *modules*. The appearance and behavior of each HTML page/module depends on the attributes defined in System Module Maintenance. Attributes of a QAD CSS module can include JavaScript functions, security settings, screen elements, and business rules.

The first step when creating an HTML page in QAD CSS is to add and create definitions in System Module Maintenance. During the development process, the developer can return to System Module Maintenance to add, modify, or remove attributes of the new page.

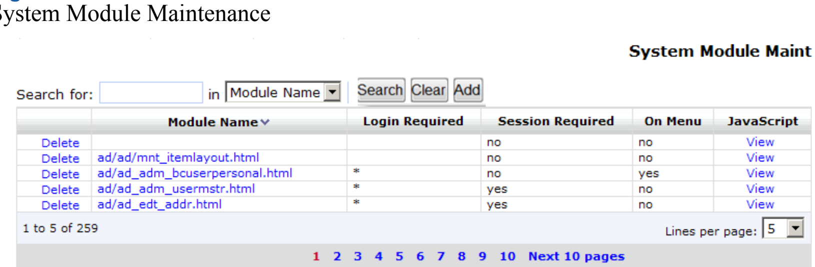
Important Every page used in QAD CSS must be registered. Not all pages are accessible from the menu. Ensure that you activate the On Menu attribute when adding a module accessible from the QAD CSS menu system.

Sometimes administrators are required to access System Module Maintenance during the application of patches or when expanding the capabilities of QAD CSS with additional product modules.

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

Clicking the System Module Maintenance menu option displays the screen in Figure 3.18.

Fig. 3.18
System Module Maintenance



QAD

Table 3.6 summarizes the contents of the System Module Maintenance navigation screen.

Table 3.6
System Module Maintenance Navigation

Column	Search	Search Type	Sort	Description	Link
Module Name	Y	Contains	Y	The unique name for this module. The name is the same as the physical QAD CSS HTML program. QAD CSS module names follow a specific naming convention. If you add your own pages, follow the same convention to facilitate future maintenance.	Y
Login Required	N	n/a	N	Login Required defines the class of users that can access this module. Users are associated with a specific class in User Maintenance. • *All*. Everyone can access this module. This option displays an asterisk in the Login Required column. • *None*. No one can access this module. • *Blank*. No one can access this module. • *Customer*. Only users associated with the Customer class can access this module. • *Vendor*. Only users associated with the Vendor class can access this module. • *Internal*. Only users associated with the Internal class can access this module.	N
Session Required	N	n/a	N	No: This page can be directly accessed as the first page served (accessed from a book mark) Yes: This page cannot be directly accessed as the first page without a valid session ID.	N
On Menu	N	n/a	N	Yes: This module can be added to the QAD CSS menu in Menu Maintenance. No: This module cannot be added to the QAD CSS menu in Menu Maintenance.	N
JavaScript	N	n/a	N	The link to the JavaScript Maintenance function.	Y

Related QAD CSS functions:

See page 194.

- System Module Report

See page 46.

- User Maintenance

See page 70.

- Menu Maintenance

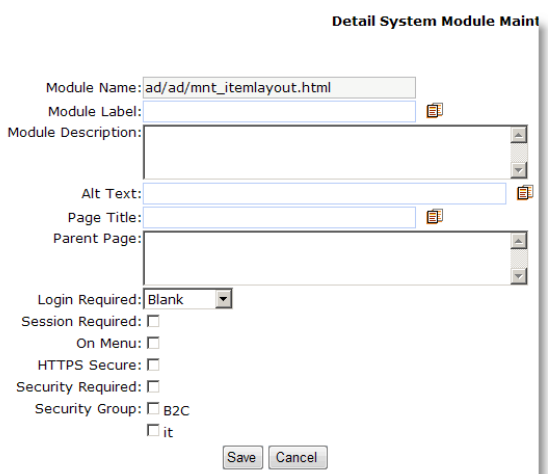
Adding a System Module Entry

The Add function of System Module Maintenance lets an administrator add custom system module documents and associate them with specific QAD CSS pages.

To create an entry:

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

Fig. 3.19
Detail System Module Maintenance



Module Name. Specify the unique name for this menu item. It is the module code relative to the QAD CSS installation directory followed by the HTML file name.

Module Label. Specify the external label for this module. This text is typically displayed on the navigation menu. The module label also serves as the default menu name in Menu Maintenance.

Module Description. Specify a brief, meaningful functional description of the module. This text is the default Menu Description in Menu Maintenance.

Alt Text. Mouse hover text in header bar.

Page Title. Specify the text displayed in the browser title bar for this page.

Parent Page. If this page is part of a series and is not the first page, specify the first page as the parent. This field is typically used in B2C implementations when a user does not always have a valid login session. In this case, if a user has bookmarked a page that requires login and attempts to return it, you are required to redirect them to the page's parent.

In this situation, if a parent page is not defined, the user is returned to the default home page as defined in System Control Maintenance.

When a page is not a part of a series, you can specify the module name here.

Login Required. Choose the class of users that can access this module. Users are associated with a specific class in User Maintenance. These classes are:

Blank: No one can access this module.

All (*): Everyone can access this module.

Customer: Only users associated with the Customer class can access this module.

Vendor: Only users associated with the Vendor class can access this module.

Internal: Only users associated with the Internal class can access this module.

Note Currently, QAD CSS users belong to the customer class by default.

Session Required. Select this option when you do not want this page to be directly accessed as the first page without a valid session ID. When this option is not selected, the page can be directly accessed as the first page served; for example, accessed by a bookmark.

On Menu. Select this option when you want the module to be available to be added to the QAD CSS menu in Menu Maintenance.

HTTPS Secure. Indicate whether secure processing is used for this page.

Note To implement this setting, make sure that SSL is set up on your Web server. Otherwise, an error appears during processing.

Security Required. Select this option when you want the module to be accessible only to users belonging to specific security groups. Then choose the user groups from the list below this field. When this option is not selected, any user can access it.

Security Group. When the Security Required option is selected, choose the user groups that you want to access the module.

Clicking a command button executes one of the following actions:

- Add saves the new record to the database. Make sure that all required fields—indicated by alternate field color—are populated before you save a record. Before saving, the system verifies that the record is unique and displays an error if it is not.
- Cancel closes the window without adding the record.

Modifying a System Module Entry

The Modify function of System Module Maintenance lets an administrator modify existing system module entries. Requirements for adding a record are the same as for editing a record.

To modify an entry:

1. Display the record to modify.
2. Click the Module Name link to display the edit screen.

See field descriptions starting on page 119.

3 Enter data into the appropriate fields. Fields that do not allow change are indicated by a second alternate color.

4 Click Save.

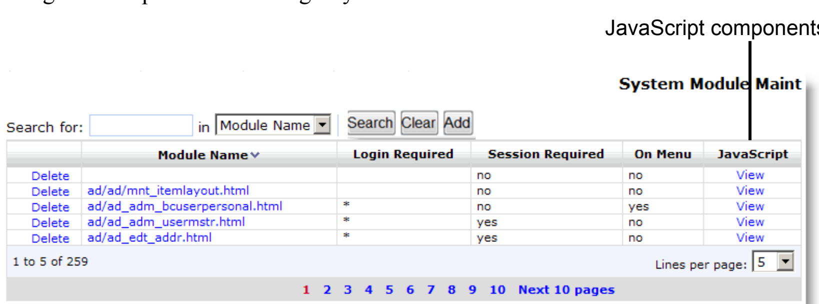
JavaScript Module Maintenance

The modular QAD CSS architecture consists of different technology components, including JavaScript among many others. QAD CSS pages are dynamically generated, automatically assembling required components to serve page requests. JavaScript Module Maintenance is the function where developers associate the appropriate JavaScript components to applicable QAD CSS modules.

JavaScript Module Maintenance is a developer-specific maintenance function in QAD CSS. A thorough understanding of QAD CSS development methodology is recommended before changing this section.

JavaScript Module Maintenance is reached from the System Module Maintenance screen by clicking the View link.

Fig. 3.20
Viewing JavaScript Details Through System Module Maintenance



Clicking the View link in System Module Maintenance displays the screen in Figure 3.21.

Fig. 3.21
JavaScript Module Maintenance

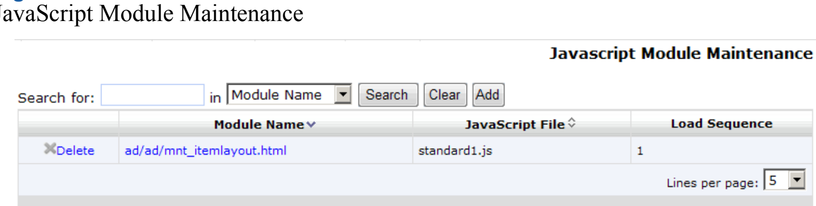


Table 3.7 summarizes the contents of the JavaScript Module Maintenance navigation screen.

Table 3.7
JavaScript Module Maintenance Navigation

Column	Search	Search Type	Sort	Description	Link
JavaScript File	Y	Equal	Y	Relative Web path and file name of the JavaScript file.	N
Module Name	Y	Contains	Y	The name of the QAD CSS module in which this JavaScript file is an included component.	Y
Load Sequence	N	n/a	N	Order in which the corresponding JavaScript is loaded relative to the other JavaScript files that are loaded in the module.	N

Adding a JavaScript Entry

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

- The name and location of the JavaScript file
- The QAD CSS module associated with the JavaScript file
- The load order

To create an entry:

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

Fig. 3.22
Detail JavaScript Maintenance

Module Name. The name of the QAD CSS module where this JavaScript file is included as a component.

JavaScript File. Relative Web path and file name of the JavaScript file.

Load Sequence. Order in which the corresponding JavaScript is loaded relative to other JavaScript files loaded in the module.

Clicking a command button executes one of the following actions:

- Add saves the new record to the database. Make sure that all required fields—indicated by alternate field color—are populated before you save a record. Before saving, the system verifies that the record is unique and displays an error if it is not.
- Cancel closes the window without adding the record.

Modifying a JavaScript Entry

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

To modify an entry:

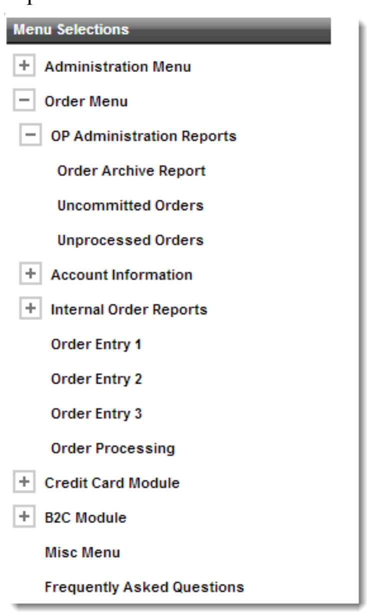
1. Display the record to modify.
2. Click the Module Name link to display the edit screen.

See field descriptions starting on page 122.

3. Enter data into the appropriate fields. Fields that do not allow change are indicated by a second alternate color.
4. Click Save.

Example You can display an expandable menu by modifying the Java script. In Detail JavaScript Maintenance, change the value of JavaScript File from `javamenu.js` to `expmenu.js`. Then on the Home page, you can see that the menu becomes expandable.

Fig. 3.23
Expandable Menu



Customer Load

Use the Customer Load function to complete the process of updating QAD CSS with QAD EA customer data.

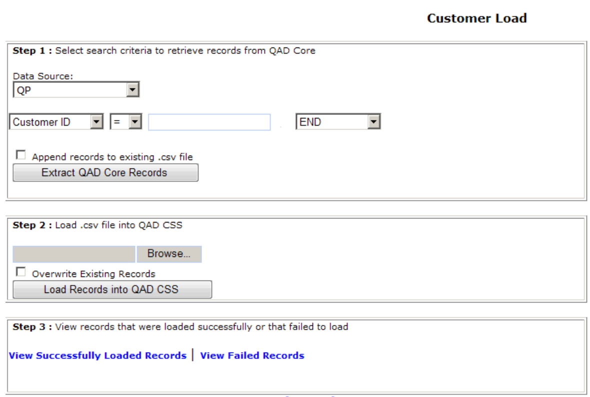
Note Only active customer records with complete customer data in QAD EA can be loaded into QAD CSS.

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

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

Clicking the Administration Menu|System Control Menu|Customer Load menu option displays the screen in Figure 3.24.

Fig. 3.24
Customer Load



Select Records to Extract from QAD EA

To extract the data:

1 Choose the domain with customer records you want to load.

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

3 Choose an operator from the list: =, <>, <, <=, >, >=.

4 Enter the value you want to match on, such as region = West. Determine these values from QAD EA, since your input is not validated on the Customer Load screen.

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

6 Indicate whether to append records to an existing CSV file.

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

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

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

8 Save this spreadsheet with a unique name to a local drive or your network file share. If you are working with multiple files, include a data and time stamp to ensure file uniqueness, such as `WestRegionCusomers092004.csv`.

Note If you execute multiple queries and append the data, chances are that the results include duplicate records. Sort the data by customer ID and make sure that there are no duplicates before loading. If duplicates exist, when the load is done with overwrite update, the system applies the values from the last record loaded; otherwise, errors result from the duplicate records.

View and Update Extracted Data

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

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

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

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

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

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

Load Customer Data into QAD CSS

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

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

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

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

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

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

Review Logs and Correct Errors

The load process creates three files on the server:

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

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

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

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

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

You can save this file in a work area and correct the data that caused errors. Then use Customer Load to reprocess the corrected records. It is unnecessary for you to remove the error information written in the last column, because the load ignores it.

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

Make sure that you store copies of the success and error files with meaningful names on a local drive or accessible file share, because these files can be useful for auditing at a later time. And also make sure that procedures are in place to back up the files.

Catalog Load

Use the Catalog Load function to complete the process of updating QAD CSS with QAD EA item data. You can also use this function to delete a catalog and reload an entirely new one.

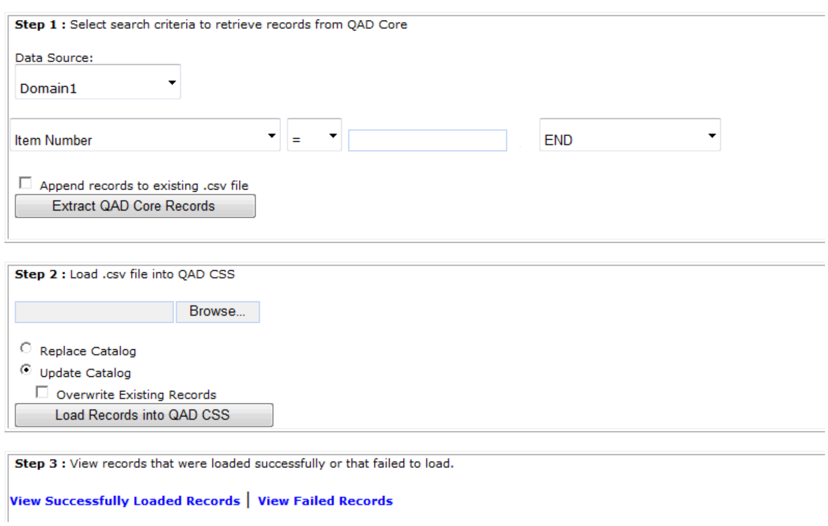
Note QAD CSS includes a Customer Item Maintenance function where you can create items and modify associated data elements. However, this function is better suited for day-to-day minor modifications, rather than initial setup activities. You are supposed to consider QAD EA as the primary source of item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

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

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

Clicking the Administration Menu|System Control Menu|Catalog Load menu option displays the screen in Figure 3.25.

Fig. 3.25
Catalog Load



Select Records to Extract from QAD EA

To extract the data:

1. Choose the domain containing the items you want to load.
2. Enter the item attribute to use for selecting records in the first query field. The choices are item number, customer item number, customer number, product line, item type, status, site, group, promotion group, division, and date added.
3. Choose an operator from the list: =, <>, <, <=, >, >=
4. Enter the value you want to match on, such as type = FG. Determine these values from QAD EA, since your input is not validated on the Catalog Load screen.
5. Select a command to continue or end the current query.
6. Indicate whether to append records to an existing spreadsheet.

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

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

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

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

Note If you execute multiple queries and append the data, chaces are that the results include duplicate records. Sort the data by item ID and make sure that there are no duplicates before loading. If duplicates exist, when the load is done with overwrite enabled, the system applies the values from the last record loaded; otherwise, errors result from the duplicate records.

View and Update Extracted Data

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

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

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

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

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

Load Item Data into QAD CSS

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

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

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

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

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

Review Logs and Correct Errors

The load process creates three files on the server:

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

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

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

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

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

QAD CSS Clearance Code

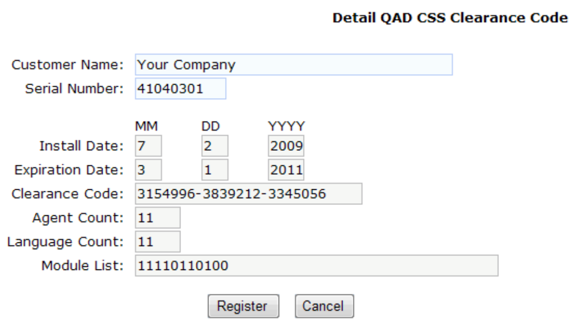
QAD CSS Clearance Code is used for informational purposes to let administrators view the clearance information for their implementation of QAD CSS. This information is available only for registered owners of QAD CSS.

Registration is a one-time event that typically takes place during installation of the product. You would need to execute this function again only if you purchase additional languages or licenses. See *Customer Self Service Installation Guide* for details about registering your product during installation.

The menu location of QAD CSS Clearance Code is Home Menu|Administration Menu|System Control Menu|QAD CSS Clearance Code.

Clicking the QAD CSS Clearance Code menu option displays the screen in Figure 3.26.

Fig. 3.26
Detail QAD CSS Clearance Code



Customer Name. Name of the company registering QAD CSS.

Serial Number. Unique identifier used with the customer name to register QAD CSS. The serial number is provided in your product package and specified during installation.

Install Date. Date of initial installation.

Expiration Date. Date the software expires.

Clearance Code. Code provided by QAD to register the software.

Agent Count. The number of Progress WebSpeed agents that can be used with this installation of QAD CSS.

Language Count. Total number of language modules allowed for this implementation.

Module List. An internal list that indicates which modules have been purchased and installed. The integer 1 indicates that a module is installed; 0 indicates that it is not.

Clicking a command button executes one of the following actions:

- Register sends the company name and serial number you specify to the QAD CSS clearance server for validation. Once validated, the clearance server returns the additional details about the license, including the clearance code, agent count, language count, and module list. The Register button then changes to Update. Clicking update stores the information returned by the clearance server in your QAD CSS database, where it can be viewed here.
- Cancel closes the window without adding the record.

Chapter 4

Language

This chapter covers the use of language functions for non-English installations of QAD CSS.

Introduction

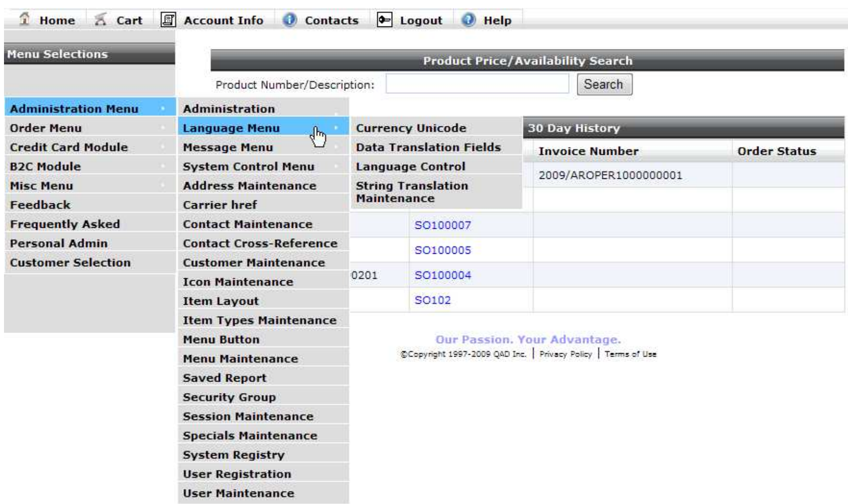
Language functions let you set up information used for non-English installations. You can also use these functions to modify the strings and labels that display in English.

See “QAD CSS Clearance Code” on page 129.

Your QAD CSS system must be cleared to use multiple languages before language translation takes effect. QAD CSS Clearance Code lets you view the number of languages cleared for your system.

The menu location of language functions is Home Menu|Administration Menu|Language Menu.

Fig. 4.1
QAD CSS Language Menu



There are three major language translation processes in QAD CSS. Language maintenance is the first step in establishing the rules for each process.

- The first process translates individual fixed strings.
- The second process translates phrases of text that possibly contain calculated values.
- The third process translates specific data elements.

QAD CSS language functions include:

See page 133.

- Currency Unicode Maintenance establishes a relationship between currency codes and the currency symbols displayed in QAD CSS.

See page 136.

- Data Translation Fields Maintenance controls which database fields are available for translation into other languages.

See page 138.

- Language Control Maintenance is used to create and maintain the definitions of languages implemented in QAD CSS.

See page 141.

- String Translation Maintenance controls the translation of most noneditable text in QAD CSS such as buttons, labels, and informational text. Phrases that contain a combination of strings and values are dynamically translated in real time when a page is loaded.

See “Language Control Maintenance” on page 138 to set the default language.

The initial default language in QAD CSS is set to English. Any language can be chosen as the default. Set the default language to the appropriate language before defining data that is translatable into other languages. Data translation definitions are allowed only from the default language.

See “Menu Maintenance” on page 70 for details on menu setup and security.

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

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

Currency Unicode Maintenance

Use Currency Unicode Maintenance to establish the relationship between the currency codes in QAD EA and the currency symbols displayed in QAD CSS.

The currency symbols are represented by hexadecimal codes for the character set of the appropriate language. The hexadecimal for the same currency symbol can be different across character sets. The ISO currency symbols possibly do not match the currency codes in QAD EA.

The International Organization for Standardization (ISO) Web site lists the most current world currency abbreviations for the ISO 4217 character set. You can access the Web site at:

http://www.iso.ch

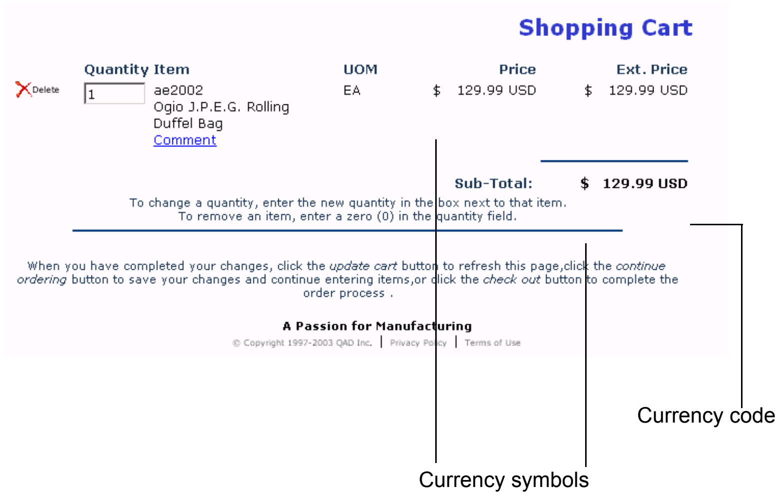
Important Use the codes as defined by QAD EA.

If you are an international organization, take into account the likelihood of your customers not having the appropriate display translators.

The registry setting *useCurrencyUnicode* determines whether the system looks for a hexadecimal unicode associated with the currency for this user session in Currency Unicode Maintenance. If one has been defined, it is displayed before the price amounts. If *useCurrencyUnicode* is No, nothing displays before the price. However, the system always displays the currency code after the price.

Example A hexadecimal value is associated with USD in Currency Unicode Maintenance; $ displays before the price and USD after it.

Fig. 4.2
Currency Symbols



The menu location of Currency Unicode Maintenance is Home Menu|Administration Menu|Language Menu|Currency Unicode Maintenance.

Clicking the Currency Unicode Maintenance menu option displays the screen in Figure 4.3.

Fig. 4.3
Currency Unicode Maintenance

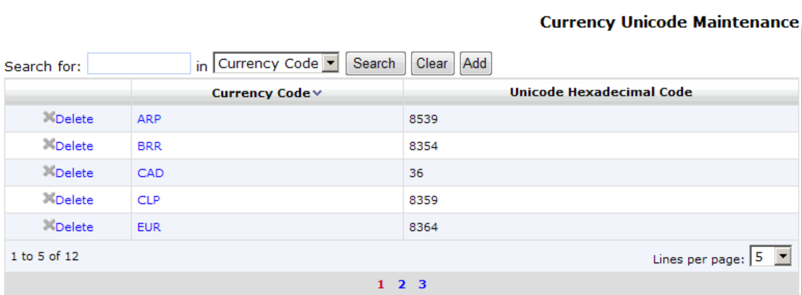


Table 4.1 summarizes the contents of the Currency Unicode Maintenance navigation screen.

Table 4.1
Currency Unicode Maintenance Navigation

Column	Search	Search Type	Sort	Description	Link
Currency Code	Y	Begins	Y	The abbreviation of the currency code as defined in QAD EA.	Y
Hexadecimal Code	N	n/a	N	The currency code symbol represented in hexadecimal format. A hexadecimal code is necessary for Web browsers to display the currency symbol.	N

Related QAD CSS functions:

- Order Entry 1

- Order Entry 2
- Order Entry 3

See page 138.

- Language Control Maintenance

Adding a Currency Unicode Entry

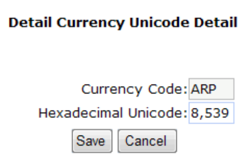
The Add function of Currency Unicode Maintenance lets an administrator add custom currency unicode documents and associate them with specific QAD CSS pages. The following information is required to complete this process:

- The ISO 4217 three-letter code for the currency
- The correct hexadecimal code for the currency symbol and the Web browser language pack that the user uses.

To create an entry:

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

Fig. 4.4
Detail Currency Unicode



Currency Code. The abbreviation of the currency code as defined in QAD EA.

Hexadecimal Unicode. The currency code symbol represented in hexadecimal format. A hexadecimal code is necessary for the Web browser to display the currency symbol.

Important It is important to understand the relationship between character sets and hexadecimal codes, as well as how they interact and work in software applications. Errors in character sets can lead to unpredictable results.

Clicking a command button executes one of the following actions:

- Add saves the new record to the database in the wpro_currency table. Make sure that all required fields—indicated by alternate field color—are populated before you save a record. Before saving, the system verifies that the record is unique and displays an error if it is not.
- Cancel closes the window without adding the record.

Modifying a Currency Unicode Entry

The Modify function of Currency Unicode Maintenance lets an administrator modify existing currency unicode entries. Requirements for adding a record are the same as for editing a record.

To modify an entry:

1 Display the record to modify.

2 Click the Currency Code link to display the edit screen.

See field descriptions starting on page 135.

3 Enter data into the appropriate fields. Fields that do not allow change are indicated by a second alternate color.

4 Click Save.

Data Translation Fields

Use Data Translation Fields Maintenance to specify database fields available for translation into other languages. When fields are marked as translatable, the system performs additional processing to look up translated values.

If you do not plan to translate some fields, removing them as candidates can increase connection speed and help to free WebSpeed agents.

The menu location of Data Translation Fields Maintenance is Home Menu|System Control|Data Translation Fields Maint.

Clicking the Data Translation Fields Maintenance menu option displays the screen in Figure 4.5.

Fig. 4.5
Data Translation Fields Maintenance

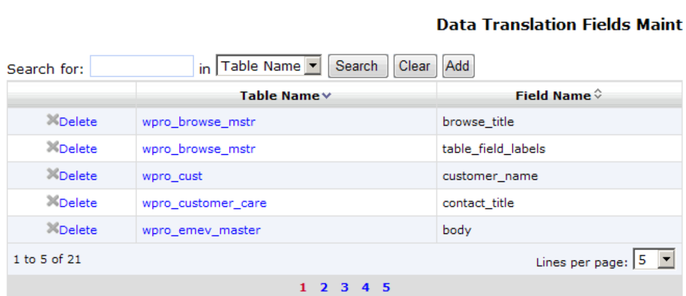


Table 4.2 summarizes the contents of the Data Translation Fields Maintenance navigation screen.

Table 4.2
Data Translation Fields Maintenance Navigation

Column	Search	Search Type	Sort	Description	Link
Table Name	Y	Contains	Y	Available only in add mode. It is the actual QAD CSS database table name.	Y
Field Name	Y	Contains	Y	Available only in add mode. It is the actual database table field name.	N

Related QAD CSS functions:

See page 188.

- Data Translation Report

Adding a Data Translation Field Entry

The Add function of Data Translation Fields Maintenance lets an administrator add custom data translation. The following information is required to complete this process:

- Database table name
- Database table field name

To create an entry:

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

Fig. 4.6
Detail Edit Translation Fields

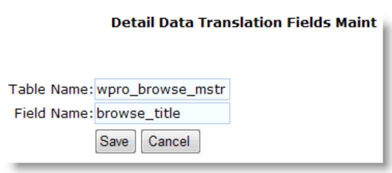


Table Name. This must be the complete name of an existing database table.

Field Name. This must be an existing field in the database table.

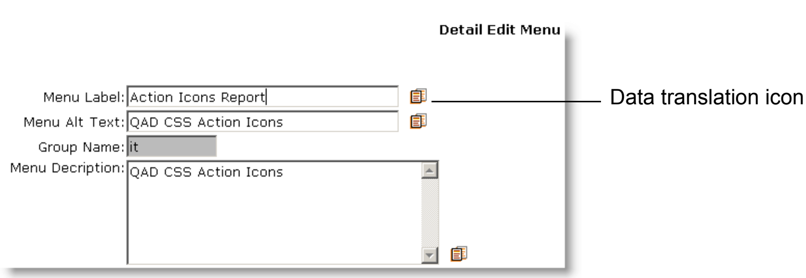
Clicking a command button executes one of the following actions:

- Add saves the new record to the database. Make sure that all required fields—indicated by alternate field color—are populated before you save a record. Before saving, the system verifies that the record is unique and displays an error if it is not.
- Cancel closes the window without adding the record.

After a data translation entry is added, the data translation icon is displayed next to the field when you modify an entry in the corresponding maintenance function.

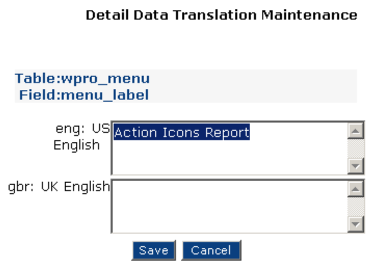
Note Data translation icons display only when you are logged in with the default language. Data translation is not allowed from a non-default language.

Fig. 4.7
Data Translation Field in Customer Care Edit Screen



Clicking the data translation icon activates a window that lets you translate the associated data field into each supported language.

Fig. 4.8
Data Translation of Menu Button Data Field



Modifying a Data Translation Entry

You cannot modify existing data translation entries using Data Translation Fields Maintenance. Changes to existing data translation are customization effort□.

Language Control Maintenance

Use Language Control Maintenance to create and maintain the definitions of languages implemented in QAD CSS. Language Control Maintenance is the core of all language, translation, and display functions. All languages defined within Language Control Maintenance can be accessed simultaneously, serving real-time translated Web pages based on user language preference.

See “QAD CSS Clearance Code” on page 129.

The number of languages that can be operated depends on the number of language modules purchased for QAD CSS. The number of language modules is displayed in the QAD CSS Clearance Code function.

Warning Do not delete the default language under any circumstances.

When multiple languages are used, make sure that the ISO number for the HTML document character set supports every language. The International Organization for Standardization Web site lists the most current HTML coded character sets. You can access the Web site at:

http://www.iso.ch

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

Clicking the Language Control Maintenance menu option displays the screen in Figure 4.9.

Fig. 4.9
Language Control Maintenance

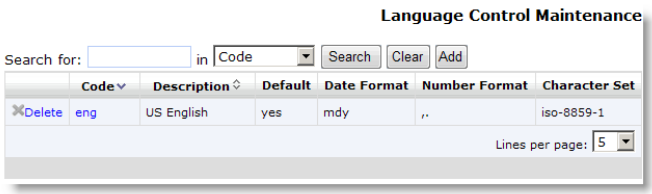


Table 4.3 summarizes the contents of the Language Control Maintenance navigation screen.

Table 4.3
Language Control Maintenance Navigation

Column	Search	Search Type	Sort	Description	Link
Code	Y	Begins	Y	A unique identifier for this language.	Y
Language Description	Y	Begins	Y	The native name of the language; for example, Espanõl.	N
Default	N	n/a	N	This field indicates the default language of the QAD CSS implementation. Only one language can be set as the default. **Do not change the default language.**	N
Date Format	N	n/a	N	Date display format order (d=day, m=month, y=year)	N
Number Format	N	n/a	N	Number display format for thousand separator and decimal point.	N
Character Set	N	n/a	N	HTML document character set (ISO number).	N

Related QAD CSS functions:

See page 141.

- String Translation Maintenance

See page 133.

- Currency Unicode Maintenance

See page 188.

- Data Translation Report

See page 46.

- User Maintenance

Adding a Language Control Entry

The Add function of Language Control Maintenance lets an administrator add a language definition.

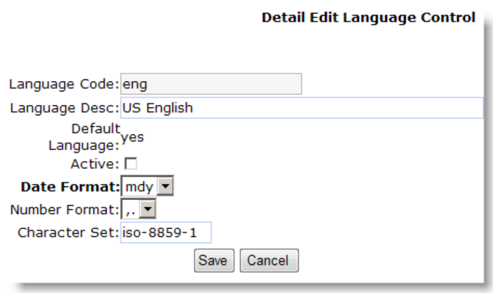
To create an entry:

1 Click Add in the navigation window to display the edit screen in Add mode.

2 Enter data into the appropriate fields.

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

Fig. 4.10
Detail Edit Language Control



Language Code. A unique identifier for this language.

Language Description. The native name of the language; for example, Espanõl.

Default Language. This field cannot be changed. It indicates the default language of the QAD CSS implementation. Only one language can be set as the default. Do not change the default language.

Active. Indicate if this language is currently active.

Date Format. Select the appropriate month/day/year format from the drop-down list.

Number Format. Select the thousand and decimal format for languages.

Character Set. Specify the ISO number for the HTML document character set.

Check all Database tables to be copied from default language. This causes related database records to be copied from the default language database records. Administrators can then use the appropriate maintenance function to edit records with translatable fields.

Important Not checking wpro_error_msg can cause JavaScript errors while logging in using the new language. Not checking wpro_data_trans can cause the data fields to show up unpopulated.

Clicking a command button executes one of the following actions:

- Add saves the new record to the database in the wpro_lang_control table. Make sure that all required fields—indicated by alternate field color—are populated before you save a record. Before saving, the system verifies that the record is unique and displays an error if it is not.
- Cancel closes the window without adding the record.

Modifying a Language Control Entry

The Modify function of Language Control Maintenance lets an administrator modify existing language control entries. Requirements for adding a record are the same as for editing a record.

To modify an entry:

1 Display the record to modify.

2 Click the Language Code link to display the edit screen.

See field descriptions starting on page 139.

3 Enter data into the appropriate fields. Fields that do not allow change are indicated by a second alternate color.

4 Click Save.

String Translation Maintenance

The QAD CSS String Translation Maintenance function lets administrators translate many of the maintenance buttons, labels, and informational text and phrases. Translated text can appear on many QAD CSS pages in different languages.

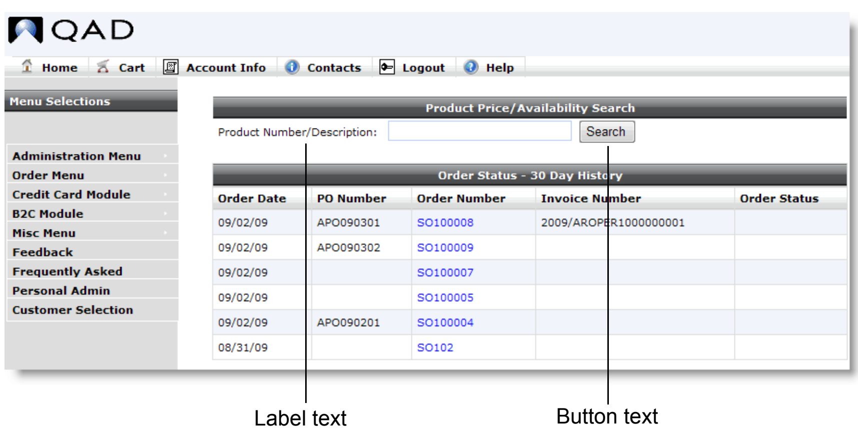
See "Language Control Maintenance" on page 138.

Note The general appearances of numbers and dates are set up in Language Control Maintenance.

Translations of different elements are maintained through different functions. String Translation Maintenance covers most noneditable text that appears as labels on different screens including pop-up windows. It also translates maintenance buttons such as Add and Cancel.

Available options in String Translation Maintenance are dictated by the language modules and licenses that have been purchased with QAD CSS.

Fig. 4.11
Text Strings Available for Translation



The menu location of String Translation Maintenance is Home Menu|Administration Menu| Language Menu|String Translation Maintenance.

Clicking the String Translation Maintenance menu option displays the screen in Figure 4.12.

Fig. 4.12
String Translation Maintenance

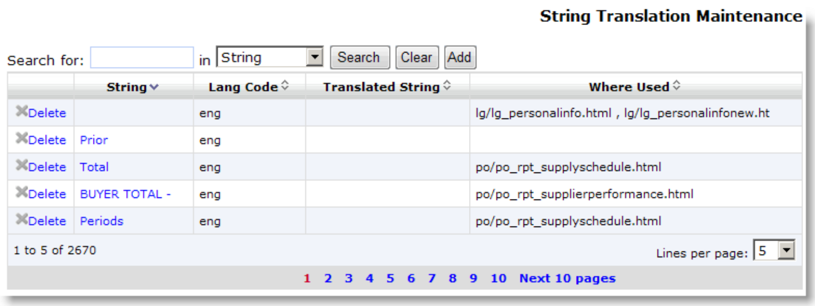


Table 4.4 summarizes the contents of the String Translation Maintenance navigation screen.

Table 4.4
String Translation Maintenance Navigation

Column	Search	Search Type	Sort	Description	Link
String	Y	Contains	Y	Static (prompt) text.	Y
Translated String	Y	Contains	Y	Translated static prompt text. Strings in English show blank translated strings.	N
Language Code	Y	Begins	Y	A recognizable code for the translation language.	N

Related QAD CSS functions:

See page 41.

- Security Group Maintenance

See page 66.

- Menu Button Maintenance

See page 70.

- Menu Maintenance

See page 117.

- System Module Maintenance

Adding a String Translation Entry

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

- The name of the string to added
- The text string in English and the translated language

To create an entry:

1 Click Add in the navigation window to display the edit screen in Add mode.

2 Enter data into the appropriate fields.

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

Fig. 4.13
Detail Edit String Translation

Language Code. Select an available language code from the drop-down menu.

String. The string as it appears in English (default language). Some strings are too long to put into the string field; they can be abbreviated; for example, lg_custsel_1, he_msg_1.

Translated String. The correct translation for the string.

Where Used. The module where the string is used. This field is for your information and can help with future maintenance activities.

Clicking a command button executes one of the following actions:

- Add saves the new record to the database. Make sure that all required fields—indicated by alternate field color—are populated before you save a record. Before saving, the system verifies that the record is unique and displays an error if it is not.
- Cancel closes the window without adding the record.

Modifying a String Translation Entry

The Modify function of String Translation Maintenance lets an administrator modify existing string translation entries. Requirements for adding a record are the same as for editing a record.

To modify an entry:

1 Display the record to modify.

2 Click the String link to display the edit screen.

See field descriptions starting on page 142.

3 Enter data into the appropriate fields. Fields that do not allow change are indicated by a second alternate color.

4 Click Save.

Chapter 5

Messages

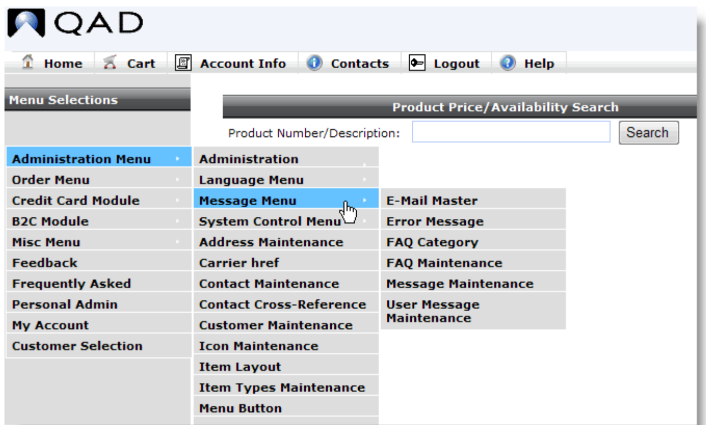
This chapter describes the appearance and use of various types of messages displayed in QAD CSS.

Introduction

Message functions let you determine when various messages display as well as the message content. Messages are used to notify users when events or errors have occurred, to deliver additional information to users, and to provide immediate answers to frequently asked questions.

The menu location of message functions is Home Menu|Administration Menu|Message Menu.

Fig. 5.1
QAD CSS Message Menu



Message functions include the following:

- E-Mail Master Maintenance functions to automatically notify users, customers, salespeople, administrators, and others using e-mail when certain events occur.
- Error Message Maintenance is used to create, edit, and delete error and informational messages to users. The message delivery method (e-mail, HTML, or log) and the message itself are configurable.
- FAQ Category Maintenance and FAQ Maintenance are used to create question and answer pages and logically group them by category.
- Message Maintenance defines the welcome message displayed on the home page viewed by all users or groups of users.
- User Message Maintenance is used to create messages directed at specific users and displayed on the home page. The user must click a link to display the message content.

See "Menu Maintenance" on page 70 for details on menu setup and security.

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

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

E-Mail Master Maintenance

A key feature of QAD CSS lets administrators set up e-mail to be sent automatically when certain events occur. The events are predefined trigger points. Use E-Mail Master Maintenance to activate the events and define the message content.

QAD Customer Self Service Implementation Guide contains a full list of the events that can trigger an e-mail.

Each event that triggers a message can be associated with one or more QAD CSS users who receive the e-mail. These users must be defined in QAD CSS User Maintenance. Users do not have to access the system; however, setting them up as users is required to define the e-mail address. If it is necessary for some of your internal personnel to be informed of events but unnecessary for them to have access to the system, you can send messages to user accounts that are disabled.

When an e-mail is generated, you can also send a copy of the message to the user whose session generated it or to the salesperson associated with an order.

The menu location of E-Mail Master Maintenance is Home Menu|Administration Menu|E-Mail Master Maintenance.

Clicking the E-Mail Master Maintenance menu option displays the screen in Figure 5.2.

Fig. 5.2
E-Mail Master Maintenance

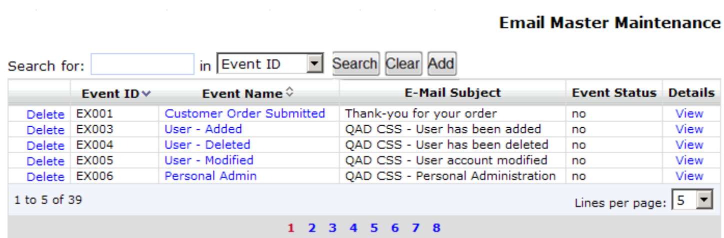


Table 5.1 summarizes the contents of the E-Mail Master Maintenance navigation screen.

Table 5.1
E-Mail Master Maintenance Navigation

Column	Search	Search Type	Sort	Description	Link
Event ID	Y	Begins	Y	Unique identifier for this e-mail event.	Y
Event Name	Y	Begins	Y	A meaningful name that describes the event.	N
E-Mail Subject	N	n/a	N	The content of subject line for the e-mail.	N
Details	N	n/a	N	This link activates the maintenance for the recipient list of this e-mail event.	Y

Related QAD CSS functions:

See page 190.

- E-Mail Address Report

See page 191.

- E-Mail Event Journal Report

See page 200.

- User Master Report

Adding an E-Mail Master Entry

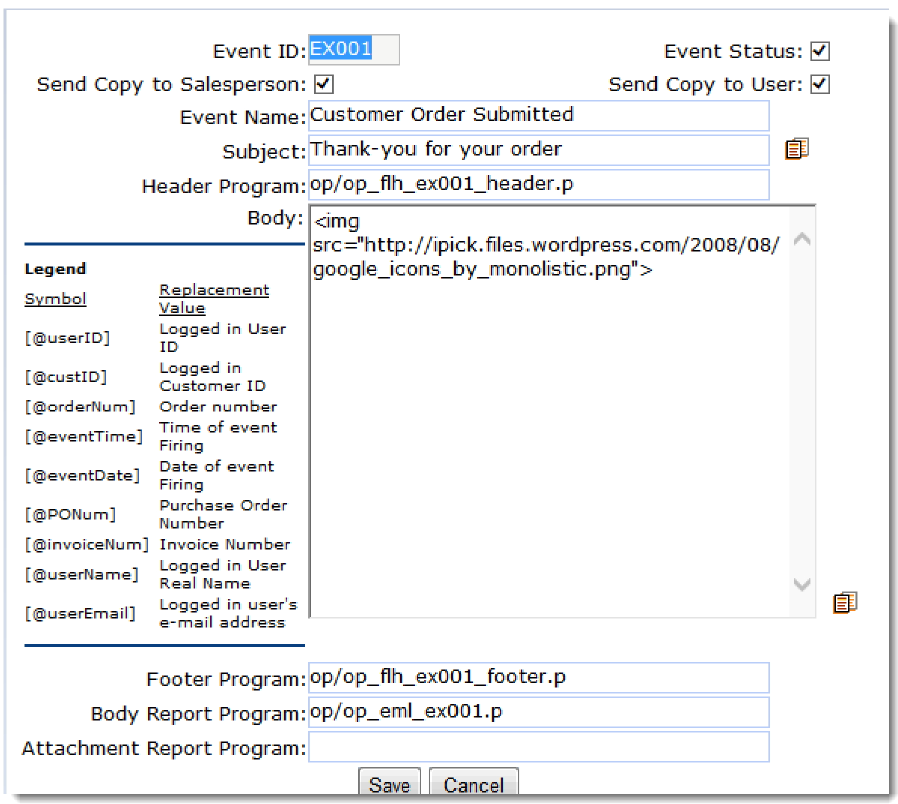
The Add function of E-Mail Master Maintenance lets an administrator add custom e-mail events and the content of the e-mail. The following information is required to complete this process:

- The event ID of a predefined QAD CSS e-mail event
- The content of the message
- Runtime replacement symbols that are available

To create an entry:

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

Fig. 5.3
Detail Master E-Mail Maintenance



Event ID. Unique identifier for this e-mail event.

Event Status. This field indicates the status of the event. When the field is selected, the event is active.

Send Copy to Salesperson. This field indicates whether a customer's salespeople (as defined in QAD EA) receive a copy of the e-mail. When the field is selected, this feature is active.

Send Copy to User. This field indicates whether the customer receives a copy of the e-mail. When this option is selected, this feature is active.

Event Name. A meaningful name that describes the event

Subject. The content of the subject line for the e-mail, including symbol replacements, if needed.

Header Program. Specify the name of the procedure to execute to generate the header of the e-mail.

Body. Specify the content of the e-mail, including symbol replacements, if needed.

Footer Program. Specify the name of the procedure to execute to generate the footer of the e-mail.

Body Report Program. Specify the name of the procedure to execute to generate the body of the message. Procedures can be developed to extend the content of the e-mail to include such things as reports or other complex content.

Attachment Report Program. Specify the name of the procedure to execute to generate the attachments to the e-mail. Procedures can be developed to extend the e-mail function to include such things as reports or other complex content in attachments.

Clicking a command button executes one of the following actions:

- Add saves the new record to the database in the wpro_emev_master table. Make sure that all required fields—indicated by alternate field color—are populated before you save a record. Before saving, the system verifies that the record is unique and displays an error if it is not.
- Cancel closes the window without adding the record.

Symbol Replacement

The e-mail subject and body use a symbol replacement feature. A symbol is a string of predefined text that is replaced when the e-mail is generated with the value that the symbol represents. Predefined symbols are listed in the screen legend.

The value for a symbol is only available in associated functions of QAD CSS. For example, generating an e-mail with the `[@orderNum]` symbol at the time of login does not produce an order number in the e-mail content.

Modifying an E-Mail Master Entry

The Modify function of E-Mail Master Maintenance lets an administrator modify existing e-mail master entries. Requirements for adding a record are the same as for editing a record.

To modify an entry:

1. Display the record to modify.
2. Click the Event Name link to display the edit screen.

See field descriptions starting on page 148.

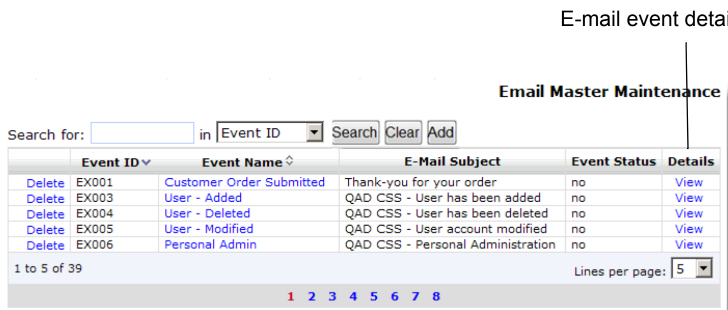
3. Enter data into the appropriate fields. Fields that do not allow change are indicated by a second alternate color.
4. Click Save.

E-Mail Event Maintenance

While in E-Mail Master Maintenance, you can click a View link to display e-mail events corresponding to the Event row.

Note *QAD Customer Self Service Implementation Guide* contains a full list of the events that can trigger an e-mail.

Fig. 5.4
Viewing E-mail Event Details Through E-Mail Master Maintenance



Clicking a View link displays the screen in Figure 5.5.

Fig. 5.5
E-Mail Event Maintenance

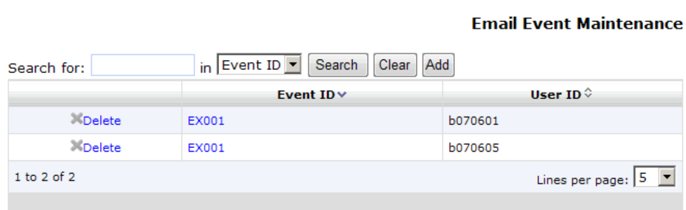


Table 5.2 summarizes the contents of the E-Mail Event Maintenance navigation screen.

Table 5.2
E-Mail Event Maintenance Navigation

Column	Search	Search Type	Sort	Description	Link
Event ID	Y	Equals	Y	Unique identifier of the e-mail event.	Y
User ID	Y	Equals	Y	User associated with this event.	N

Adding an E-Mail Event Entry

The Add function of E-Mail Event Maintenance lets an administrator add custom e-mail event documents and associate them with specific QAD CSS pages.

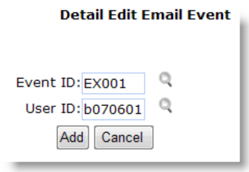
To create an entry:

1 Click Add in the navigation window to display the edit screen in Add mode.

2 Enter data into the appropriate fields.

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

Fig. 5.6
Detail Edit E-Mail Event



Event ID. Enter an existing identifier for an e-mail event. This field can be browsed to locate valid entries.

Browse icon. This icon brings up an e-mail event master window that lets users select from a list of all existing e-mail events.

User ID. Unique identifier for a QAD CSS user. This field can be browsed to locate valid entries.

Browse icon. This icon brings up a browse master window that lets users select from a list of all valid QAD CSS user IDs.

Clicking a command button executes one of the following actions:

- Add saves the new record to the database. Make sure that all required fields—indicated by alternate field color—are populated before you save a record. Before saving, the system verifies that the record is unique and displays an error if it is not.
- Cancel closes the window without adding the record.

Modifying an E-Mail Event Entry

The Modify function of E-Mail Event Maintenance lets an administrator modify existing e-mail event entries. Requirements for adding a record are the same as for editing a record.

To modify an entry:

1. Display the record to modify.
2. Click the Event ID link to display the edit screen.

See field descriptions starting on page 150.

3. Enter data into the appropriate fields. Fields that do not allow change are indicated by a second alternate color.
4. Click Save.

Error Message Maintenance

The QAD CSS Error Message Maintenance function lets administrators create, edit, and delete error messages. There are two types of error messages: JavaScript (js) and Progress (pro). The way the message is delivered (e-mail, HTML, or log) as well as the messages themselves are configurable.

Administrators can also use Error Message Maintenance to create messages that deliver additional information to the user when an event occurs. This functionality is similar to E-Mail Master Maintenance, but Error Message Maintenance is not restricted to e-mail notification only.

QAD CSS comes with over a thousand programmed events, most of which do not require user interaction. JavaScript error messages do not require event actions.

Note JavaScript error messages are preloaded into HTML pages. When adding or modifying a JavaScript message, you are required to click Generate File to create the actual file.

See “Error Action Maintenance” on page 154.

Events can be set up through Error Message Maintenance, but activating them requires custom programming.

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

Clicking the Error Message Maintenance menu option displays the screen in Figure 5.7.

Fig. 5.7
Error Message Maintenance

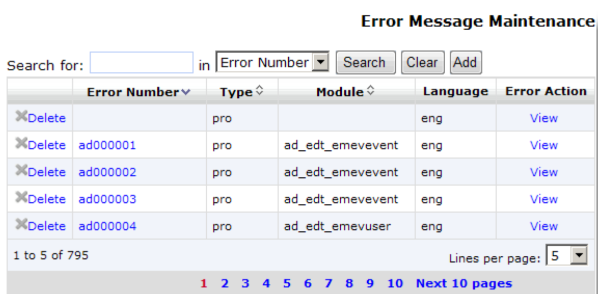


Table 5.3 summarizes the contents of the Error Message Maintenance navigation screen.

Table 5.3
Error Message Maintenance Navigation

Column	Search	Search Type	Sort	Description	Link
Error Number	Y	Begins	Y	Unique error identifier.	Y
Type	Y	Begins	Y	The type of error (Progress or JavaScript).	N
Module	Y	Begins	Y	Specific QAD CSS module from which the error results.	N
Language	N	n/a	N	The language associated with the error message. If a message is to appear in multiple languages, it must have a unique error number for each language.	N
Error Action	N	n/a	N	Displays Error Action Maintenance for the specific error number.	Y

Related QAD CSS functions:

See page 192.

- Error Message Master

Adding an Error Message Entry

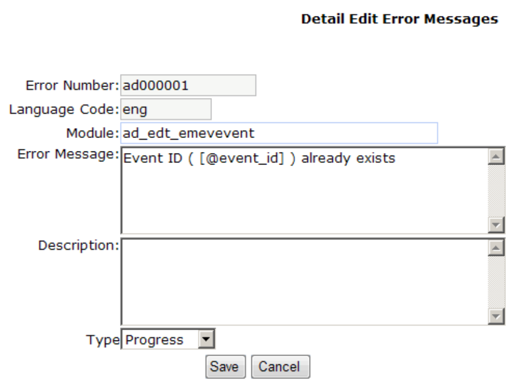
The Add function of Error Message Maintenance lets an administrator add custom error message documents and associate them with specific QAD CSS pages.

To create an entry:

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

   Note Adding an event does not generate event actions. Custom development is required to implement events.

Fig. 5.8
Detail Edit Error Message



Error Number. Unique error message identifier. Progress events use a two-digit module code plus six-digit sequence numbers with leading zeros. JavaScript events use *e_* plus non-leading zero sequence numbers.

Note In Error Action Maintenance when you click Add, Error Number is read-only.

Language Code. Language in which the event displays. Make sure that you create a unique event for each language that the message displays in.

Module. The QAD CSS program associated with the event.

Error Message. The actual message content that displays.

Description. A detailed description including the error path.

Type. Progress or JavaScript.

Clicking a command button executes one of the following actions:

- Add saves the new record to the database. Make sure that all required fields—indicated by alternate field color—are populated before you save a record. Before saving, the system verifies that the record is unique and displays an error if it is not.

- Cancel closes the window without adding the record.

Modifying an Error Message Entry

The Modify function of Error Message Maintenance lets an administrator modify existing error message entries. Requirements for adding a record are the same as for editing a record.

To modify an entry:

1 Display the record to modify.

2 Click the Error Number link to display the edit screen.

See field descriptions starting on page 153.

3 Enter data into the appropriate fields. Fields that do not allow change are indicated by a second alternate color.

4 Click Save.

Error Action Maintenance

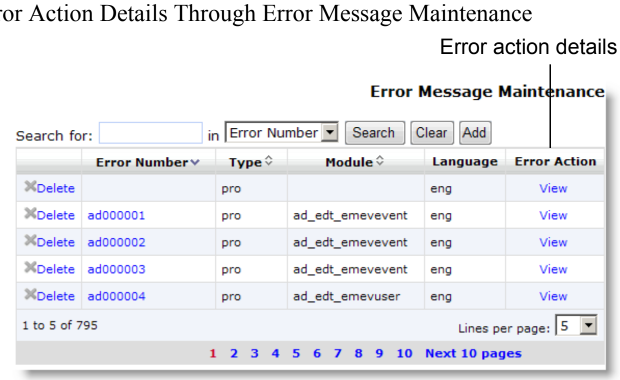
The Error Action Maintenance function lets administrators associate Progress events to specific QAD CSS users. Error Action Maintenance works with Error Message Maintenance.

HTML error actions are typically alert boxes. Log error actions typically cannot be viewed through the QAD CSS interface; they are written to the Progress log file as set up during implementation. E-mail error actions send a message to a specified user or users.

Fig. 5.9
Error Alert Box

While in Error Message Maintenance, you can click the View link to display error action event details corresponding to the row.

Fig. 5.10
Viewing Error Action Details Through Error Message Maintenance



Clicking the View link displays the screen in Figure 5.11.

Fig. 5.11
Error Action Maintenance

Table 5.4 summarizes the contents of the Error Action Maintenance navigation screen.

Table 5.4
Error Action Maintenance Navigation

Column	Search	Search Type	Sort	Description	Link
Error Number	Y	Begins	Y	Unique identifier of the event.	Y
Error Action	Y	Begins	Y	This indicates the error action being active.	N
Description	N	n/a	N	A brief description that provides a level of recognition for administrators.	N

Adding an Error Action Entry

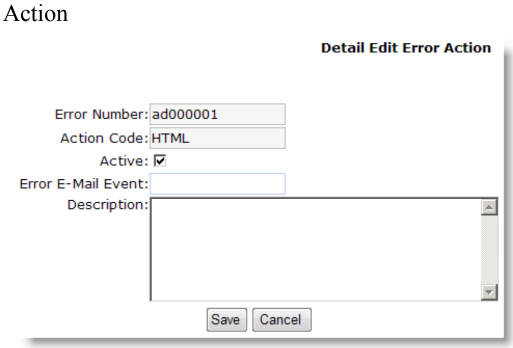
The Add function of Error Action Maintenance lets an administrator add custom event entries. Event entries must be available programmatically to be activated.

To create an entry:

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

   Note This action creates a record but cannot activate an event. Custom development is required to implement events.

Fig. 5.12
Detail Edit Error Action



Error Number. A unique identifier for the event. This one must be unique among error numbers. It is the link to the error message.

Action Code. Type of action to be taken. Select E-Mail, Log, or HTML from the drop-down list. To set up multiple actions, you are required to create a new error action.

Activate. When this option is selected, this event occurs.

Error E-Mail Event. Enter the e-mail event for the error action that you previously defined.

Description. A detailed description for administrators to identify the event. The end user cannot see this description. Information of the end user is set up in Error Message Maintenance.

Clicking a command button executes one of the following actions:

- Add saves the new record to the database. Make sure that all required fields—indicated by alternate field color—are populated before you save a record. Before saving, the system verifies that the record is unique and displays an error if it is not.
- Cancel closes the window without adding the record.

Modifying an Error Action Entry

The Modify function of Error Action Maintenance lets an administrator modify existing error action entries. Requirements for adding a record are the same as for editing a record.

To modify an entry:

1. Display the record to modify.
2. Click the Error Number link to display the edit screen.

See field descriptions starting on page 155.

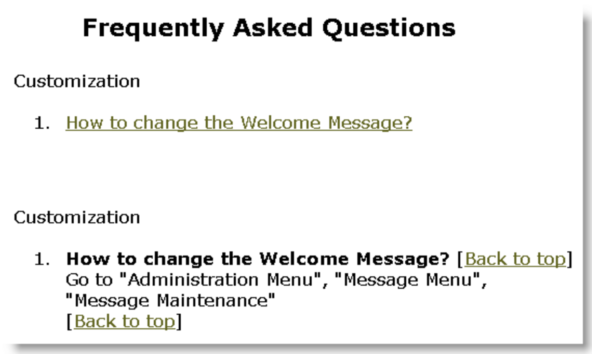
3. Enter data into the appropriate fields. Fields that do not allow change are indicated by a second alternate color.
4. Click Save.

FAQ Category Maintenance

Use FAQ (Frequently Asked Questions) Category Maintenance to set up the FAQ pages and the categories related to those pages. FAQ categories define distinct classes to which FAQs of similar concepts belong. Make sure that categories are created before you use them in FAQ Maintenance.

Correctly using and populating the FAQ can reduce QAD CSS administrative support. End users appreciate the immediate conclusion to issues that could otherwise prevent them from using the system or cause them to spend time on the phone or waiting for e-mail feedback.

Fig. 5.13
Frequently Asked Questions Grouped by Category



The menu location of FAQ Category Maintenance is Home Menu|Administration Menu|Messages Menu|FAQ Category Maintenance.

Note Consider permitting your sales support center to access this function to add FAQ content.

Clicking the FAQ Category Maintenance menu option displays the screen in Figure 5.14.

Fig. 5.14
FAQ Category Maintenance

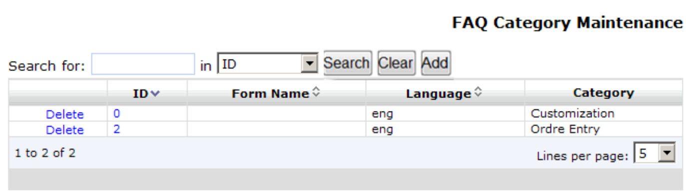


Table 5.5 summarizes the contents of the FAQ Category Maintenance navigation screen.

Table 5.5
FAQ Category Maintenance Navigation

Column	Search	Search Type	Sort	Description	Link
ID	Y	Exact	Y	The unique ID of the FAQ class.	Y
Form Name	Y	Begins	Y	Leave this field blank to use the standard form in QAD CSS. This field is used only when customized forms have been added.	N
Language	Y	Begins	Y	Identifies the language of the FAQ category.	N
Category	N	n/a	N	The display name of the category on the FAQ form.	N

Related QAD CSS functions:

See page 159.
- FAQ Maintenance

See page 41.
- Security Group Maintenance

See page 66.

- Menu Button Maintenance

See page 70.

- Menu Maintenance

See page 46.

- User Maintenance

See page 138.

- Language Control Maintenance

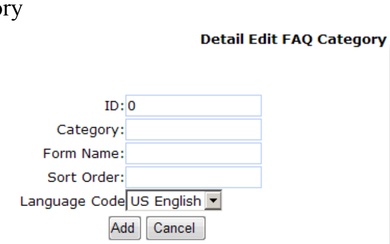
Adding a FAQ Category Entry

The Add function of FAQ Category Maintenance lets an administrator add FAQ categories to QAD CSS. FAQ categories allow an administrator to define distinct FAQ classes to which FAQs of similar concepts belong.

To create an entry:

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

Fig. 5.15
Detail Edit FAQ Category



ID. The unique ID of the FAQ class.

Category. The display name of the category on the FAQ form.

Form Name. Leave this field blank to use the standard QAD CSS form. Adding additional forms requires customization development.

Sort Order. The order in which this category displays in relation to other categories on the FAQ form.

Language. Identifies the language of the FAQ category.

Note The language code field is only editable in a multiple-language implementation of QAD CSS. In single-language implementations, this field is always stored as a blank in the database.

Clicking a command button executes one of the following actions:

- Add saves the new record to the database in the wpro_faqcategory table. Make sure that all required fields—indicated by alternate field color—are populated before you save a record. Before saving, the system verifies that the record is unique and displays an error if it is not.

- Cancel closes the window without adding the record.

Modifying a FAQ Category Entry

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

To modify an entry:

1. Display the record to modify.
2. Click the ID link to display the edit screen.

See field descriptions starting on page 158.

3. Enter data into the appropriate fields. Fields that do not allow change are indicated by a second alternate color.
4. Click Save.

FAQ Maintenance

FAQ (Frequently Asked Questions) Maintenance lets an administrator create multiple question and answer Web pages. These pages are both informational and instructional, typically presented in a question and answer format. The intent of this informational service is to reduce the help desk support requirements of a Web application. It is recommended that the FAQ be given high visibility on all Web pages—for example, on the QAD CSS menu bar.

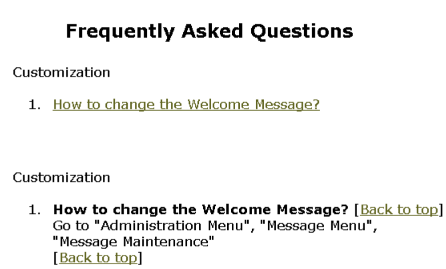
A common approach to building FAQ pages is to compile a list of useful information to present on the Web site. Next, build the leading questions that easily direct the user to the answers the site provides. It can be necessary to create several questions to the same answer to address different user perspectives.

See “FAQ Category Maintenance” on page 156 for details.

As the number of FAQs increases, you can divide the information into categories related to the business policies of the Web site. Make sure that categories are created in FAQ Category Maintenance before they are available in FAQ Maintenance.

Make Regular reviews of FAQ content part of a normal content revision cycle.

Fig. 5.16
Frequently Asked Questions and Answers



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

Note Consider permitting your sales support center to access this function to add FAQ content.

Clicking the FAQ Maintenance menu option displays the screen in Figure 5.17.

Fig. 5.17
FAQ Maintenance

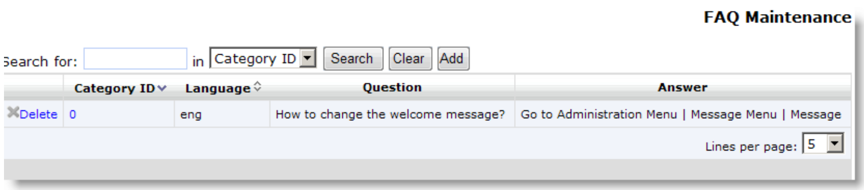


Table 5.6 summarizes the contents of the FAQ Maintenance navigation screen.

Table 5.6
FAQ Maintenance Navigation

Column	Search	Search Type	Sort	Description	Link
Category ID	Y	Exact	Y	Distinct classes to which FAQs of similar concepts belong.	Y
Language	Y	Begins	Y	Identifies the language of the FAQ text.	N
Question	N	n/a	N	The leading question to the specific information contained in the answer.	N
Answer	N	n/a	N	Clear and concise information that satisfies the question.	N

Note The user can only see FAQs in the user's language.

Related QAD CSS functions:

See page 156.
- FAQ Category Maintenance

See page 41.
- Security Group Maintenance

See page 66.
- Menu Button Maintenance

See page 70.
- Menu Maintenance

See page 46.
- User Maintenance

See page 138.
- Language Control Maintenance

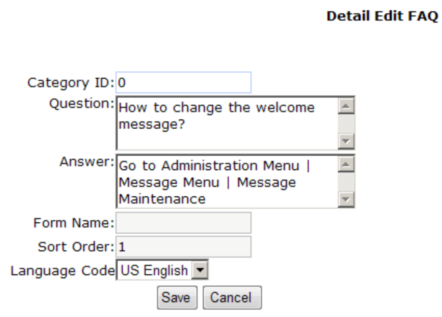
Adding a FAQ Entry

The Add function of FAQ Maintenance lets an administrator add custom FAQs to be posted in the Frequently Asked Questions page of QAD CSS.

To create an entry:

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

Fig. 5.18
Detail Edit FAQ



Category ID. The ID of the distinct class in which this FAQ belongs.

Question. The leading question to the specific information contained in the answer.

Answer. Clear and concise information that satisfies the question.

Form Name. Leave this field blank to use the standard QAD CSS form. Adding additional forms requires customization development.

Sort Order. The order in which the FAQs display in relation to other FAQs within a category.

Language Code. Identifies the language of the FAQ text.

Note The language code field only appears in the international version of QAD CSS. In single-language implementations, this field is always stored as a blank in the database.

Clicking a command button executes one of the following actions:

- Add saves the new record to the database in the wpro_faq table. Make sure that all required fields—indicated by alternate field color—are populated before you save a record. Before saving, the system verifies that the record is unique and displays an error if it is not.
- Cancel closes the window without adding the record.

Modifying a FAQ Entry

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

To modify an entry:

1 Display the record to modify.

2 Click the Category ID link to display the edit screen.

See field descriptions starting on page 161.

3 Enter data into the appropriate fields. Fields that do not allow change are indicated by a second alternate color.

4 Click Save to commit your changes.

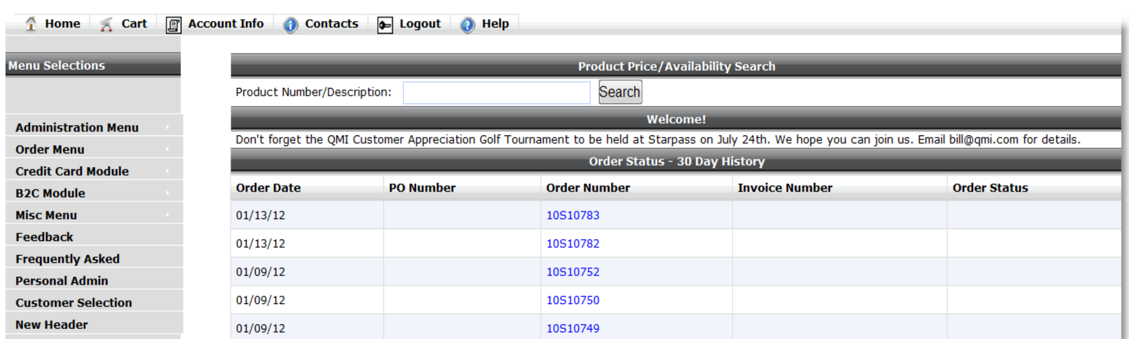
Message Maintenance

The QAD CSS Message Maintenance function lets administrators associate welcome messages with specific users or groups of users. The welcome messages are typically located in the center section of the QAD CSS home page. A welcome message can be anything from a philosophical quote to a special of the day. The ability to modify messages by users is another personalization feature of QAD CSS.

An administrator can provide home messages in plain text or with HTML markup tags. If HTML tags are used, remember to apply proper syntax and test the message before releasing to a production environment.

Note QAD CSS inserts the home message content inside an HTML table cell.

Fig. 5.19
Welcome message



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

Note Consider permitting sales and marketing access to this function.

Clicking the Message Maintenance menu option displays the screen in Figure 5.20.

Fig. 5.20
Message Maintenance

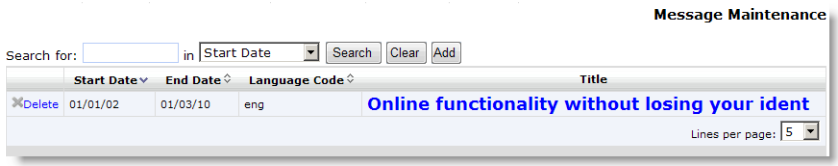


Table 5.7 summarizes the contents of the Message Maintenance navigation screen.

Table 5.7
Message Maintenance Navigation

Column	Search	Search Type	Sort	Description	Link
Start Date	Y	Equals	Y	First date that the message appears.	N
End Date	Y	Equals	Y	Last date the message appears.	N
Language Code	Y	n/a	Y	Language in which the message appears.	N
Title	N	n/a	N	Text title for the message entry.	Y

Related QAD CSS functions:

- QAD CSS Home Page

Adding a Message Entry

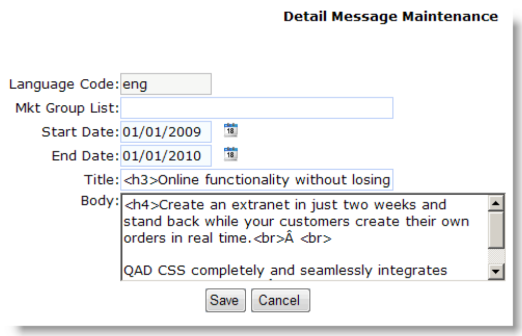
The Add function of Message Maintenance lets an administrator add custom message text to be displayed on the QAD CSS home page. The following information is required to complete this process:

- Content of the message
- The individual or group who can see the message
- The scheduled start and end dates of the message

To create an entry:

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

Fig. 5.21
Detail Message Maintenance



Language Code. Select a language for the message. The message appear only for users who run QAD CSS in the indicated language.

See "Detail User Registration Editor" on page 46 for details on creating and maintaining marketing groups.

Marketing Group List. The target marketing group that can see the message as set up in User Maintenance. Leaving this field blank indicates that this message is displayed to all users. Entering a single marketing group limits the viewing of the message to only users in that marketing group. Multiple groups are not allowed in this field.

Start Date. The beginning date that the message appears. Click the Calendar icon to select dates from a calendar.

End Date. The date after which the message discontinues.

Title. The displayed identifier of this message.

Body. The displayed content of the message

Clicking a command button executes one of the following actions:

- Add saves the new record to the database. Make sure that all required fields—indicated by alternate field color—are populated before you save a record. Before saving, the system verifies that the record is unique and displays an error if it is not.
- Cancel closes the window without adding the record.

Modifying a Message Entry

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

To modify an entry:

1. Display the record to modify.
2. Click the Title link to display the edit screen.

See field descriptions starting on page 163.

3. Enter data into the appropriate fields. Fields that do not allow change are indicated by a second alternate color.

4 Click Save.

User Message Maintenance

Use QAD CSS User Message Maintenance to associate messages with a specific user. User messages can be used to show off a new feature, welcome a new user to the site, advertise specials, or anything specific to a user. User messages are a customization feature of QAD CSS.

See “Message Maintenance” on page 162.

Messages meant for all users to see, or specified groups of users, are maintained in Message Maintenance.

Users can see a User Messages heading and message near the bottom of the home page and a message notification to the right of the browser header when messages are available. The message can be viewed by clicking the message link on the home page or the message waiting link in the header. The link on the home page is always displayed unless the user deletes the message.

An administrator can provide user messages in plain text or with HTML markup tags. If you adopt HTML tags, make sure that the syntax applied is proper. It is recommended that messages be tested before releasing to a production environment.

Note QAD CSS inserts the user message content inside an HTML table cell.

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

Clicking the User Message Maintenance menu option displays the screen in Figure 5.22.

Fig. 5.22
User Message Maintenance

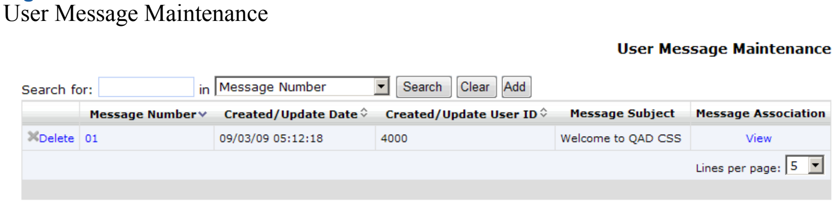


Table 5.8 summarizes the contents of the User Message Maintenance navigation screen.

Table 5.8
User Message Maintenance Navigation

Column	Search	Search Type	Sort	Description	Link
Message Number	Y	Begins	Y	Unique identifier for this message.	Y
Created/Updated Date	Y	Begins	Y	The date and time stamp that indicates the last time this message was updated.	N
Created/Updated User ID	Y	Begins	Y	The user ID of the user account responsible for adding or modifying this message.	N

Column	Search	Search Type	Sort	Description	Link
Message Subject	N	n/a	N	A brief, meaningful description of the message.	N
Message Association	N	n/a	N	This hyperlink displays a screen of users who can see this message.	Y

Related QAD CSS functions:

- QAD CSS Home Page

Adding a User Message Entry

The Add function of User Message Maintenance lets an administrator add custom user message content and associate them with specific users. The following information is required to complete this process:

- The user ID for the message
- The content of the message that the user can view

To create an entry:

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

Fig. 5.23
Detail User Message Maintenance Detail

Message Number. Unique identifier for this message.

Message Subject. A brief, meaningful description of the message.

Message Body. The message for the user. It can include HTML tags.

Clicking a command button executes one of the following actions:

- Add saves the new record to the database. Make sure that all required fields—indicated by alternate field color—are populated before you save a record. Before saving, the system verifies that the record is unique and displays an error if it is not.
- Cancel closes the window without adding the record.

Modifying a User Message Entry

The Modify function of User Message Maintenance lets an administrator modify existing user message entries. Requirements for adding a record are the same as for editing a record.

To modify an entry:

1 Display the record to modify.

2 Click the Message Number link to display the edit screen.

See field descriptions starting on page 166.

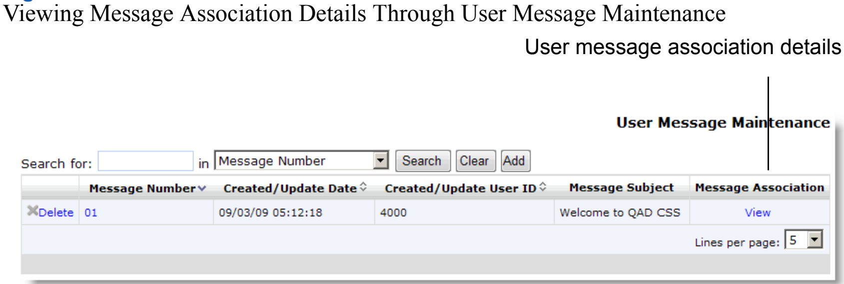
3 Enter data into the appropriate fields. Fields that do not allow change are indicated by a second alternate color.

4 Click Save.

User Message Detail Maintenance

While in User Message Maintenance, you can click a View link to display and add user associations to the corresponding row.

Fig. 5.24
Viewing Message Association Details Through User Message Maintenance



Clicking a View link displays the screen in Figure 5.25.

Fig. 5.25
User Message Detail Maintenance

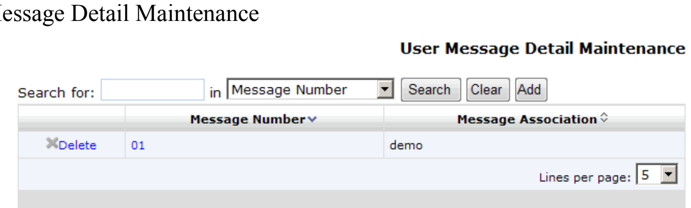


Table 5.9 summarizes the contents of the User Message Detail Maintenance navigation screen.

Table 5.9
User Message Detail Maintenance Navigation

Column	Search	Search Type	Sort	Description	Link
Message Number	Y	Begins	Y	Unique identifier for this message.	Y
Message Association	Y	Begins	Y	User associated with this message.	N

Adding a User Message Association Entry

The Add function of User Message Detail Maintenance lets an administrator add users and associate them with specific user messages.

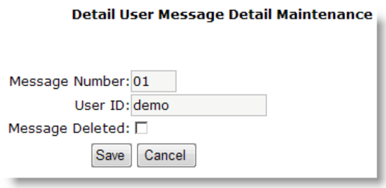
To create an entry:

1 Click Add in the navigation window to display the edit screen in Add mode.

2 Enter data into the appropriate fields.

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

Fig. 5.26
Detail User Message Detail Maintenance



Message Number. The number of the corresponding message row.

User ID. A unique identifier for a QAD CSS user.

Message Deleted. When this option is selected, the system does not display the message for this user. This field is also used to indicate that the user has deleted the corresponding user message from the browser.

Clicking a command button executes one of the following actions:

- Add saves the new record to the database. Make sure that all required fields—indicated by alternate field color—are populated before you save a record. Before saving, the system verifies that the record is unique and displays an error if it is not.
- Cancel closes the window without adding the record.

Modifying a User Message Association Entry

The Modify function of User Message Detail Maintenance lets an administrator modify existing user association entries. Requirements for adding a record are the same as for editing a record.

To modify an entry:

1 Display the record to modify.

2 Click the Message Number link to display the edit screen.

See field descriptions starting on page 167.

3 Enter data into the appropriate fields. Fields that do not allow change are indicated by a second alternate color.

4 Click Save.

Chapter 6

Reports

This chapter discusses the following administration reports:

Overview

QAD CSS provides several reports that let users view information created during the order-entry process and the administration of QAD CSS maintenance functions.

The request screens that you use to create reports share common features. Report fields let you enter selection criteria for the report that limits the search. Entering search criteria for a report is optional. Fields left blank automatically use the default values found in `reports_global.i`. In addition, the report uses all entered parameters to limit the results of the report.

Fig. 6.1
Sample Report Request Screen

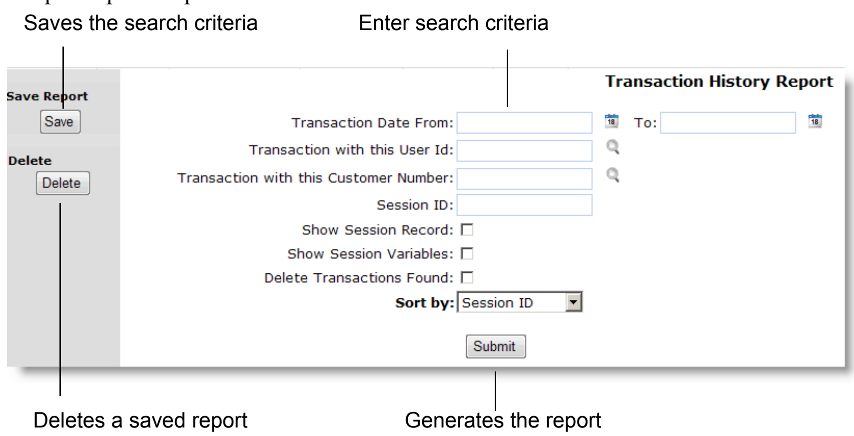


Figure 6.1 illustrates a sample report screen in QAD CSS. Report screens open with the same type of display with one or more fields that let users enter search criteria to limit the results of the report.

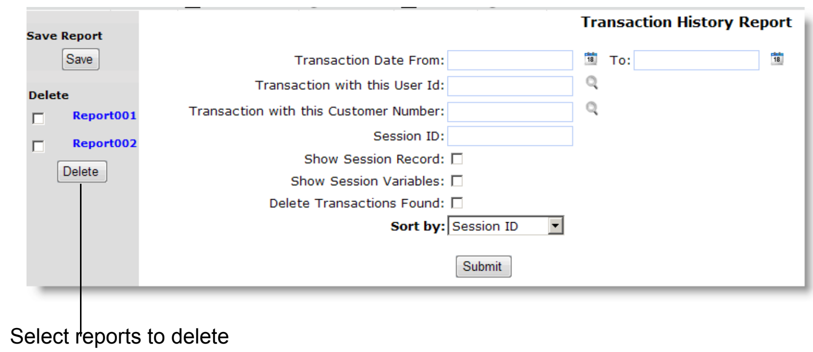
> *Save.* Click Save to open a window that lets you save the generated report using the entered search criteria.

Fig. 6.2
Saving Report Settings

See "Saved Report Maintenance" on page 84.

> QAD CSS provides a maintenance function for creating and modifying saved reports.
>
> *Delete.* Select the check box next to one or more saved reports and then click Delete to delete the report.

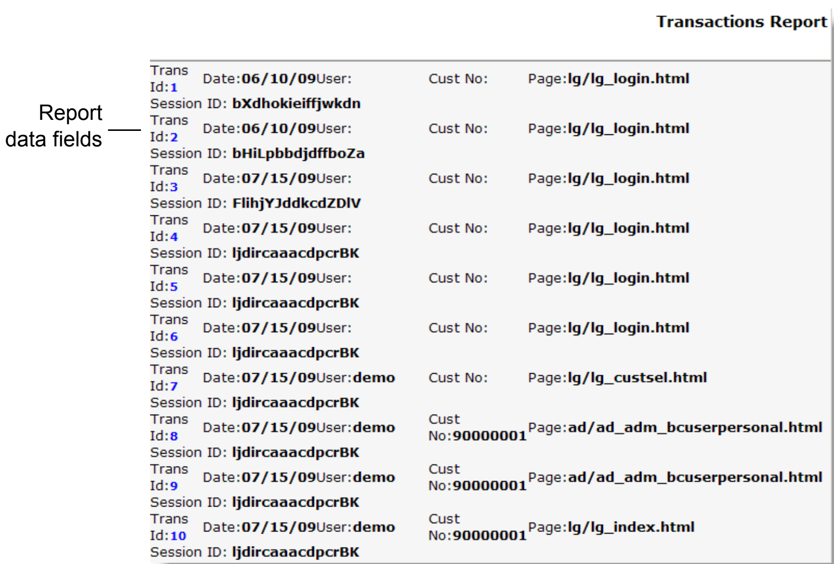
Fig. 6.3
Deleting Saved Reports



Submit. Click Submit to generate the report using the entered search criteria.

After you click Submit, a separate report screen appears.

Fig. 6.4
Sample Report Screen

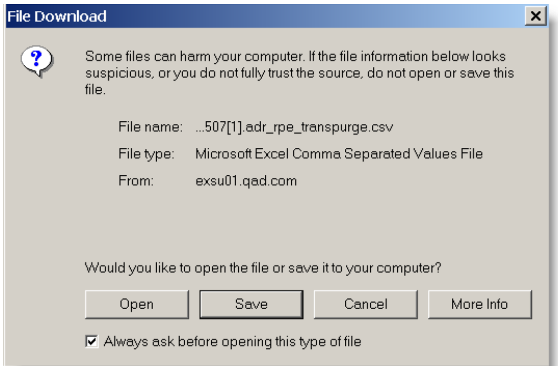


Report Data Fields. Return data according to the selection criteria in the report request screen.

Print. Click Print to print the report.

Download. Click Download to open a window that lets you save the generated report as a comma-separated values (.csv) file. This button is not available on all reports.

Fig. 6.5
File Download Screen



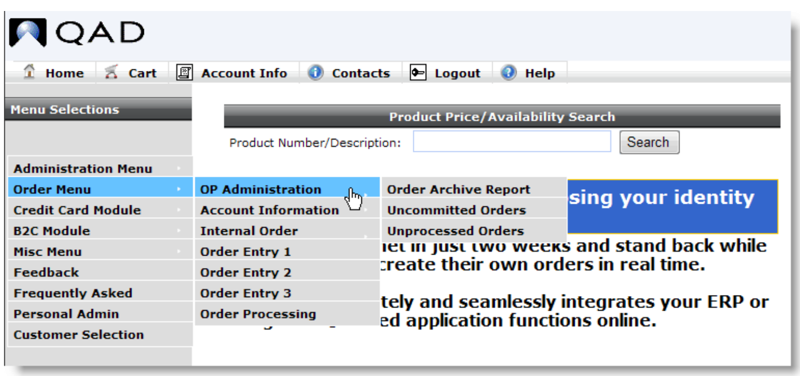
Close. Click Close to close the report screen without saving.

Order Processing Administration Reports

Use order processing administration reports to view information related to orders received from customers.

The menu location of order processing administration reports is Home Menu|Order Menu|OP Administration.

Fig. 6.6
OP Administration Reports Menu



Order processing administration reports include the following:

- Order Archive Report
- Uncommitted Orders
- Unprocessed Orders

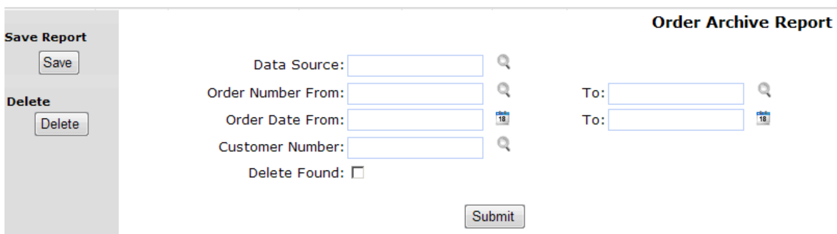
Order Archive Report

See “Archive Orders” on page 108.

Use Order Archive Report to view orders received through QAD CSS and successfully committed to QAD EA. When orders are successfully committed to QAD EA, they are deleted from the QAD CSS order tables. Depending on the Archive Orders setting in Order Control Maintenance, orders can be archived in QAD CSS before being deleted. This report is used to view these archived orders. In addition, this report serves as a maintenance function to delete orders from QAD CSS.

Clicking the Order Archive Report menu option displays the screen in Figure 6.7.

Fig. 6.7
Order Archive Report Request Screen



Warning This report possibly takes an extended period of time to execute when submitted with no criteria to limit the results.

The Order Archive Report request screen lets users find orders using the data source, order number, order date, and customer number searches. Search results show only the orders matching the search criteria.

1 Choose the data source that represents the domain where items on the orders to be reported are located.

2 Enter the order number range for the report. Order numbers are assigned by QAD CSS. If QAD CSS is not being used, then order numbers assume the format and sequence from QAD EA. When these fields are left blank, this parameter is not used to limit the result.

3 Enter all or part of the order date range for the report.

4 Enter a valid customer number to limit the report to orders for that customer only.

5 Indicate whether to delete archived orders no longer needed. The system only deletes the orders shown on the report.

Important If selection criteria are not specified, the system deletes all archived orders when the Delete option is selected.

6 Click Submit to generate the report according to the selection criteria.

Uncommitted Orders Report

See “Order Control Maintenance” on page 106.

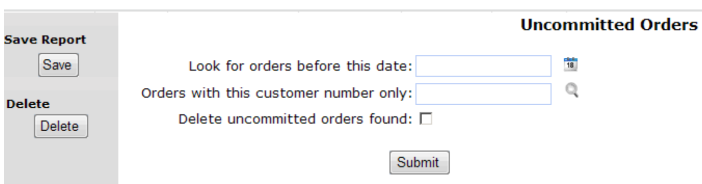
Use Uncommitted Orders to view orders that have been entered but not submitted by customers. These orders are created when Recover Orders is set to Yes in Order Control Maintenance. When this field is Yes, the system saves orders so that if the order entry process is interrupted—for example, when the customer loses their Internet connection—the customer can return to the site and the order information is available to complete.

This report can be used to view how many orders are waiting to be recovered. In addition, this report serves as a maintenance function to purge abandoned orders from the database.

Note To prevent excessive database growth, system administrators should periodically perform this function to purge abandoned orders from the system.

Clicking the Uncommitted Orders Report menu option displays the screen in Figure 6.8.

Fig. 6.8
Uncommitted Orders Request Screen



The Uncommitted Orders request screen lets users find orders using order date and customer number searches. Search results will only show the orders matching the search criteria.

1. Enter a valid date or use the calendar browse for the date selection.
2. Enter a valid customer number to view all uncommitted orders for a particular customer.
3. Indicate whether to delete the uncommitted orders no longer needed. When the Delete option is selected, only the transactions shown on the report will be deleted.

Important When selection criteria are not specified, the system deletes all uncommitted orders.

4. Click Submit to generate the report according to the selection criteria.

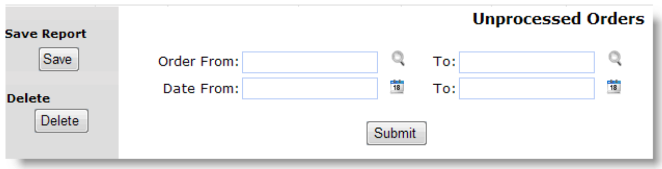
Unprocessed Orders Report

Use Unprocessed Orders to view all orders submitted by customers but not yet committed to QAD EA. The orders shown here are the same orders displayed in Order Processing. This report can be used to view how many orders are waiting to be committed.

Note If the system is set up to commit orders directly to QAD EA, then you find no orders shown there.

Clicking the Unprocessed Orders menu option displays the screen in Figure 6.9.

Fig. 6.9
Unprocessed Orders Request Screen



The Unprocessed Orders request screen lets users find orders using order number and order date searches. Search results only show orders matching the search criteria.

1. Enter the order number range for the report. Order numbers are assigned by QAD CSS. If QAD CSS is not being used, order numbers assume the format and sequence from QAD EA. When these fields are left blank, all orders are within the scope of search.
2. Enter all or part of the order date range for the report.
3. Click Submit to generate the report according to the selection criteria.

Report Links

The Unprocessed Orders single-line display summary provides an order number link to view complete details about the order.

Related QAD CSS functions:

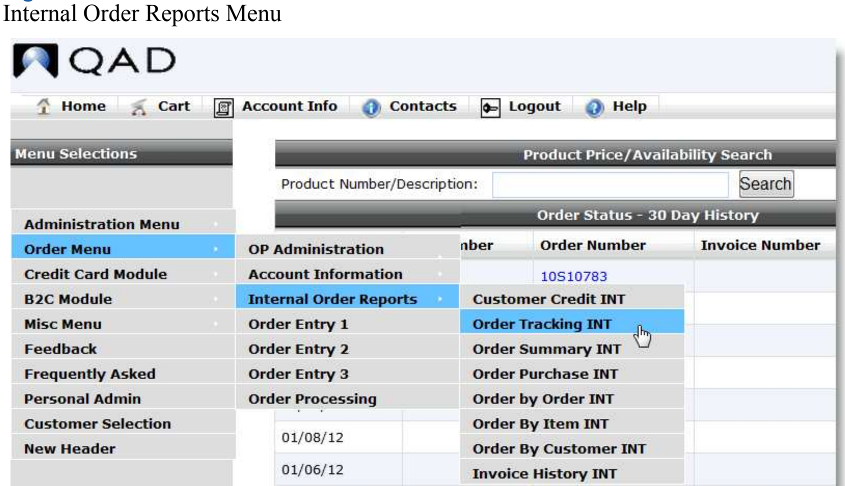
- Order Processing
- Open Sales Order Report

Internal Order Reports

Use internal order reports to view summary or detailed customer order information.

The menu location of internal order reports is Home Menu|Order Menu|Internal Order Reports.

Fig. 6.10
Internal Order Reports Menu



Internal order reports include the following:

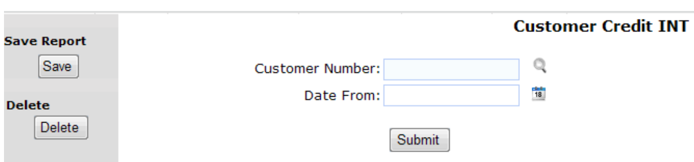
- Customer Credit INT
- Order Tracking INT
- Order Summary INT
- Order Purchase INT
- Order by Order INT
- Order by Item INT
- Order by Customer INT
- Invoice History INT

Customer Credit INT

Use Customer Credit INT to view detailed customer credit information.

Clicking the Customer Credit INT menu option displays the screen in Figure 6.11.

Fig. 6.11
Customer Credit INT Request Screen



The Customer Credit INT request screen lets users specify a customer and a start date from which to generate the credit report for that customer.

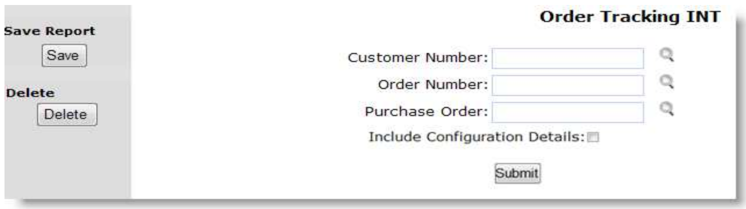
1. Enter the customer number for which you want to generate the credit report. This field is a required field.
2. Enter a valid date or use the calendar browse for the date selection.
3. Click Submit to generate the report according to the selection criteria.

Order Tracking INT

Use Order Tracking INT to view detailed order tracking information.

Clicking the Order Tracking INT menu option displays the screen in Figure 6.12.

Fig. 6.12
Order Tracking INT Request Screen



The Order Tracking INT request screen lets users specify sales order number or purchase order number of which to view detailed tracking information.

1 Enter a valid customer number to limit the report to orders for that customer only.

2 Enter either a sales order number or a PO number.

3 For configurable items, indicate whether to show configuration details in the report.

4 Click Submit to generate the report according to the selection criteria.

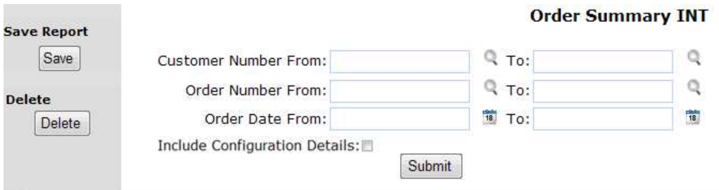
Fig. 6.13
Order Tracking INT Report

Order Summary INT

Use Order Summary INT to view summary order information.

Clicking the Order Summary INT menu option displays the screen in Figure 6.14.

Fig. 6.14
Order Summary INT Request Screen



The Order Summary INT request screen lets users find orders by using customer number, order number, and date searches. Search results show only the orders matching the search criteria.

1 Enter the customer number range for the report.

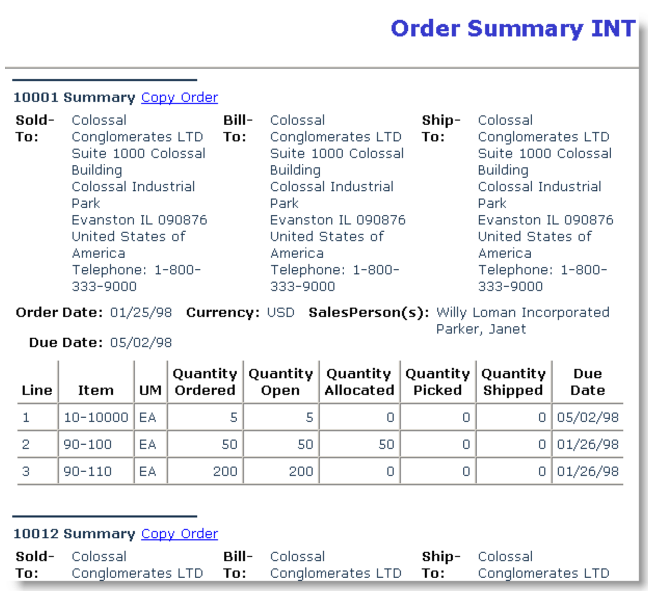
2 Enter the order number range for the report. Order numbers are assigned by QAD CSS. If QAD CSS is not being used, then order numbers assume the format and sequence from QAD EA. When these fields are left blank, this parameter is not used to limit the result.

3 Enter the order date range for the report.

4 For configurable items, indicate whether to show configuration details in the report.

5 Click Submit to generate the report according to the selection criteria.

Fig. 6.15
Order Summary INT Report


Order Summary INT

10001 Summary Copy Order

Sold-To: Colossal Conglomerates LTD Suite 1000 Colossal Building Colossal Industrial Park Evanston IL 090876 United States of America Telephone: 1-800-333-9000

Bill-To: Colossal Conglomerates LTD Suite 1000 Colossal Building Colossal Industrial Park Evanston IL 090876 United States of America Telephone: 1-800-333-9000

Ship-To: Colossal Conglomerates LTD Suite 1000 Colossal Building Colossal Industrial Park Evanston IL 090876 United States of America Telephone: 1-800-333-9000

Order Date: 01/25/98 **Currency:** USD **SalesPerson(s):** Willy Loman Incorporated Parker, Janet

Due Date: 05/02/98

Line	Item	UM	Quantity Ordered	Quantity Open	Quantity Allocated	Quantity Picked	Quantity Shipped	Due Date
1	10-10000	EA	5	5	0	0	0	05/02/98
2	90-100	EA	50	50	50	0	0	01/26/98
3	90-110	EA	200	200	0	0	0	01/26/98

10012 Summary Copy Order

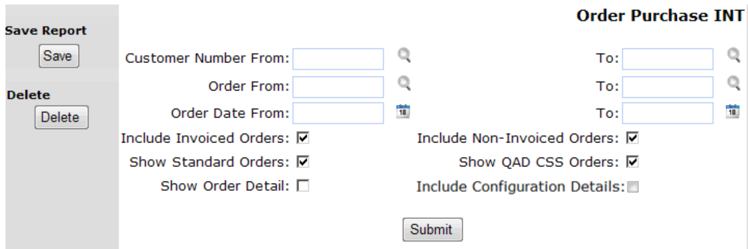
Sold-To: Colossal Conglomerates LTD **Bill-To:** Colossal Conglomerates LTD **Ship-To:** Colossal Conglomerates LTD

Order Purchase INT

Use Order Purchase INT to view detailed purchase information.

Clicking the Order Purchase INT menu option displays the screen in Figure 6.16.

Fig. 6.16
Order Purchase INT Request Screen



Note

The Order Purchase INT request screen lets users find orders by using customer number, order number, and date searches. Search results show only the orders matching the search criteria.

1 Enter the customer number range for the report.

2 Enter the order number range for the report.

3 Enter the order date range for the report.

4 Indicate whether to include invoiced orders in the report.

5 Indicate whether to include non-invoiced orders in the report.

6 Indicate whether to show standard orders in the report.

7 Indicate whether to show QAD CSS orders in the report.

8 Indicate whether to show order details in the report.

9 For configurable items that are defined with QAD Configurator, indicate whether to show configuration details in this report.

   Note Only after you select Show Order Detail can you select Include Configuration Details.

10 Click Submit to generate the report according to the selection criteria.

Fig. 6.17
Order Purchase INT Report

Order Purchase INT

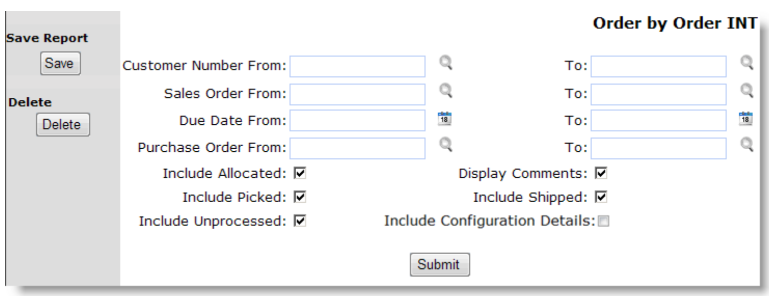
Invoice Number	Order Number	PO Number	Order Date	Order Status
10001	10000	PO-1000	06/12/92	
10002	10002	po-1000	06/12/92	
10003	10003		06/12/92	
10004	10004		06/12/92	
10005	10005		06/12/92	
10006	10006	po-1000	05/01/92	
10007	10007	PO-3333	05/01/92	
10008	10008	PO-00909	05/01/92	
300000	10016		10/20/93	
300001	10017		10/20/93	
300002	10018		10/20/93	
300003	10020		10/20/93	
300004	10022		10/21/93	
300005	10023		10/21/93	
IV300006	SO10029		02/15/94	
IV300007	SO10030		03/04/94	
	10001		01/25/98	HD

Order by Order INT

Use Order by Order INT to view detailed order information grouped by sales order.

Clicking the Order by Order INT menu option displays the screen in Figure 6.18.

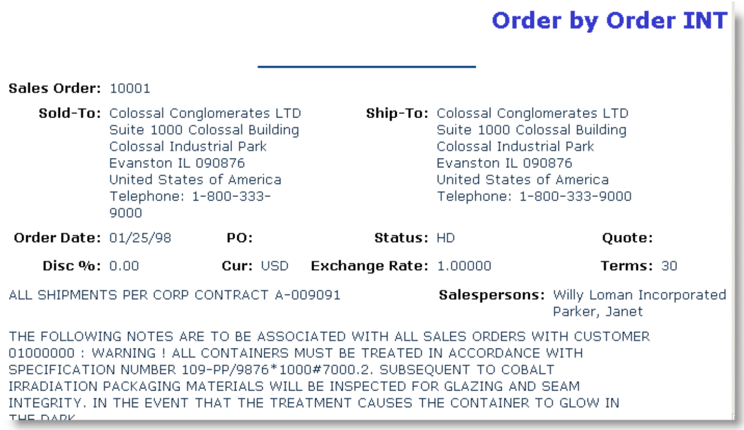
Fig. 6.18
Order by Order INT Request Screen



The Order by Order INT request screen lets users find orders using customer number, sales order, date, and purchase order searches, and define information options to be included in the report. Search results show only the orders matching the search criteria.

1. Enter the customer number range for the report.
2. Enter the sales order number range for the report.
3. Enter the due date range for the report.
4. Enter the purchase order number range for the report.
5. Indicate whether to include allocated, picked, unprocessed, and shipped items in the report.
6. Indicate whether to display comments in the report.
7. For configurable items, indicate whether to show configuration details in the report.
8. Click Submit to generate the report according to the selection criteria.

Fig. 6.19
Order by Order INT Report

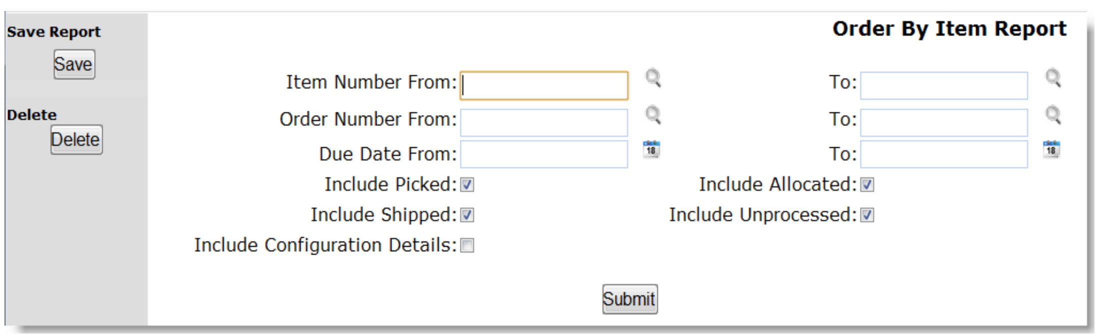


Order by Item INT

Use Order by Item INT to view detailed order information grouped by item.

Clicking the Order by Item INT menu option displays the screen in Figure 6.20.

Fig. 6.20
Order by Item INT Request Screen



The Order by Item INT request screen lets users find orders using the customer number, item number, and order number searches. Search results show only the orders matching the search criteria.

1. Enter the customer number range for the report.
2. Enter the item number range for the report.
3. Enter the order number range for the report.
4. Enter the due date range for the report.
5. Indicate whether to include allocated, picked, unprocessed, and shipped items in the report.
6. For configurable items, indicate whether to show configuration details in the report.
7. Click Submit to generate the report according to the selection criteria.

Fig. 6.21
Order by Item INT Report

Order By Item INT

10-10000
OASIS(TM) COOLING SYSTEM
HOME/INDUST MODEL
Due Date: 06/01/94

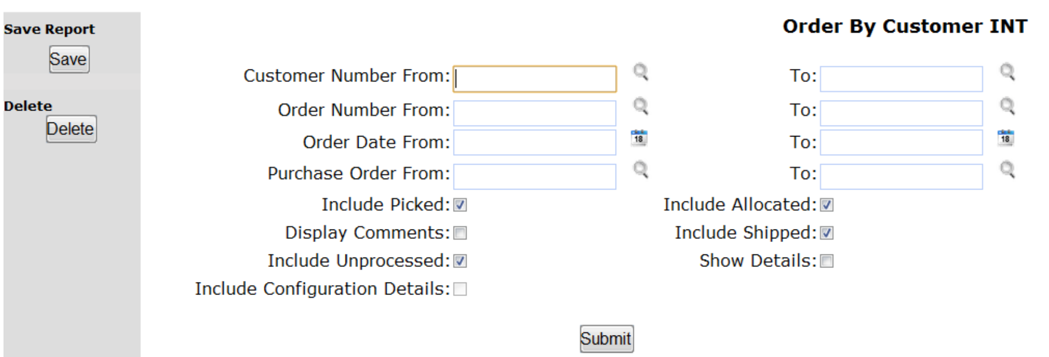
Order Number	Ln	Sold-To	Quantities	C	Price	Ext Price	Due Date	T
10001	1	01000000	Allocated 0.0 EA Picked 0.0 EA Open 5.0 EA		$ 4,800.00 USD	$ 24,000.00 USD	05/02/98	
SO10025	1	01000000	Allocated 0.0 EA Picked 0.0 EA Open 100.0 EA		$ 4,320.00 USD	$ 432,000.00 USD	03/03/94	
SO10026	1	01000000	Allocated 0.0 EA Picked 0.0 EA Open 125.0 EA		$ 4,320.00 USD	$ 540,000.00 USD	03/03/94	
SO10027	1	1001000	Allocated 0.0 EA Picked 0.0 EA Open 50.0 EA		$ 4,320.00 USD	$ 216,000.00 USD	03/03/94	
SO10028	1	10010001	Allocated 0.0 EA Picked 0.0 EA		$ 4,320.00 USD	$ 216,000.00 USD	03/03/94	

Order by Customer INT

Use Order by Customer INT to view detailed order information grouped by customer.

Clicking the Order by Customer INT menu option displays the screen in Figure 6.22.

Fig. 6.22
Order by Customer INT Request Screen



The Order by Customer INT request screen lets users find orders using the customer number, order number, order date, and purchase order number searches. Search results show only the orders matching the search criteria.

1. Enter the customer number range for the report.
2. Enter the order number range for the report.
3. Enter the order date range for the report.
4. Enter the purchase order number range for the report.
5. Indicate whether to include allocated, picked, unprocessed, and shipped items in the report.
6. Indicate whether to display comments in the report.

7 Indicate whether to show details in the report.

8 For configurable items that are defined with QAD Configurator, indicate whether to show configuration details in this report.

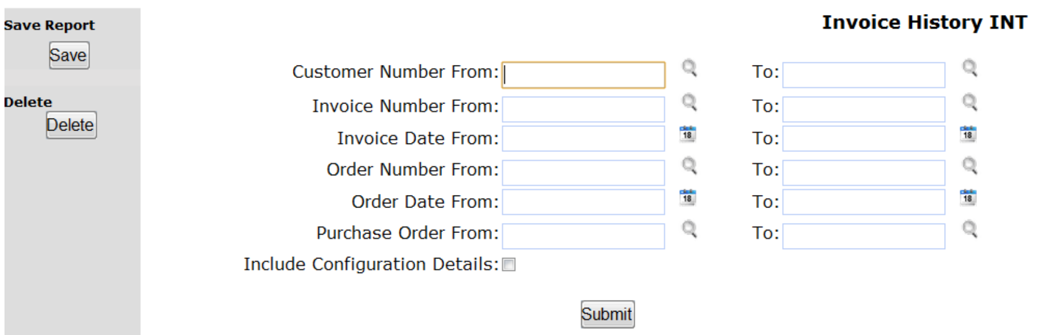
Note Only after you select Show Details can you select Include Configuration Details.

9 Click Submit to generate the report according to the selection criteria.

Invoice History INT

Use Invoice History INT to view invoice history information. Clicking the Invoice History INT menu option displays the screen in Figure 6.23.

Fig. 6.23
Invoice History INT Request Screen



The Invoice History INT request screen lets users find invoices using the customer number, invoice number, order number, and purchase order number searches. Search results show only the orders matching the search criteria.

1 Enter the customer number range for the report.

2 Enter the invoice number range for the report.

3 Enter the invoice date range for the report.

4 Enter the order number range for the report.

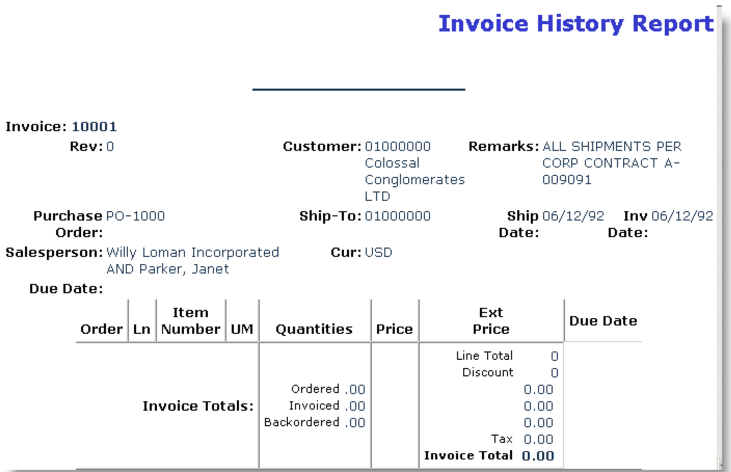
5 Enter the order date range for the report.

6 Enter the purchase order number range for the report.

7 For configurable items, indicate whether to show configuration details in the report.

8 Click Submit to generate the report according to the selection criteria.

Fig. 6.24
Invoice History INT Report

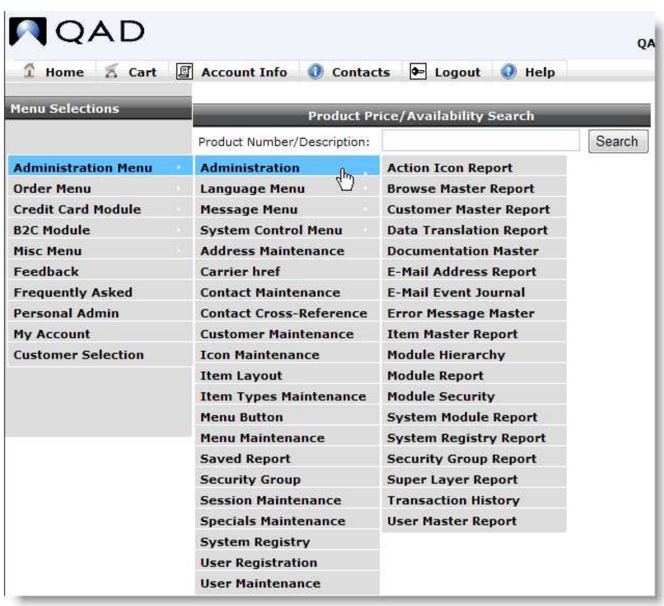


Administration Reports

Administration reports display information created during the setup and maintenance of QAD CSS administration functions.

The menu location of Administration reports is Home Menu|Administration Menu|Administration Reports.

Fig. 6.25
Administration Reports Menu



Administration reports include the following:

- Action Icons Report
- Browse Master Report
- Customer Master Report
- System Module Report
- System Registry Report
- Security Group Report

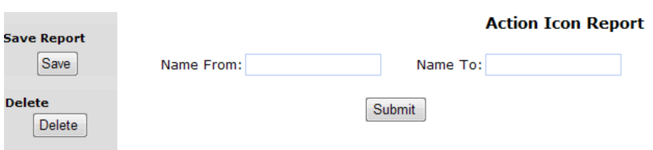
- Data Translation Report
- Documentation Master Report
- E-Mail Address Report
- E-Mail Event Journal Report
- Error Message Master Report
- Item Master Report
- Module Report
- Super Layer Report
- Transaction History Report
- Module Security Report
- User Master Report
- Module Hierarchy Report
- Credit Card Transaction Report

Action Icons

Use Action Icons Report to view icons and their corresponding actions. This report does not return information on icons used for information purposes only.

Clicking the Action Icon Report menu option displays the screen in Figure 6.26.

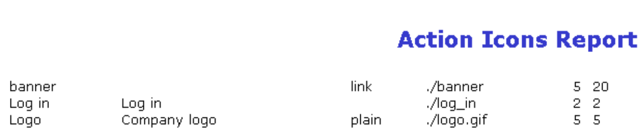
Fig. 6.26
Action Icons Report Request Screen



1 Enter the range of icon names to include in the report. Leave blank to include all icons defined in the system.

2 Click Submit to generate the report.

Fig. 6.27
Action Icons Report



Related QAD CSS functions:

See page 57.

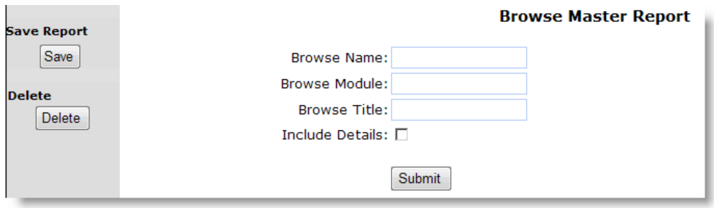
- Icon Maintenance

Browse Master Report

Use Browse Master Report to view QAD CSS browse documents and, optionally, detailed information for each browse.

Clicking the Browse Master Report menu option displays the screen in Figure 6.28.

Fig. 6.28
Browse Master Report Request Screen



The Browse Master Report request screen lets users find browses using browse name, module, and title searches. Search results will only show browses matching the search criteria.

1 Enter all or part of the browse name to include in the search. Leave blank to search for all browses.

2 Enter the name of the module in which the browse is used. Leave blank to include all modules.

3 Enter all or part of the browse title.

4 Indicate whether to include browse details. Select Include Details to display detailed information for each browse included in the report.

5 Click Submit to generate the report.

When the option to include browse details is selected, the search results in a report screen similar to Figure 6.29.

Fig. 6.29
Browse Report With Details

When generating a browse report without including details, the search results in a report screen similar to Figure 6.30.

Fig. 6.30
Browse Report Without Details

Browse Report

Browse Name	Browse Module	Browse Title
AddressCity	cm/cm_edt_cm_mstr.html	City
AddressCity	so/so_edt_admstr.html	City
AddressCity-Hunter	cm/cm_edt_cm_mstr.html	City
AddressCountry	cm/cm_edt_cm_mstr.html	Country
AddressCountry	lg/lg_edt_rolcompanyinfo.html	Country
AddressCountry	so/so_edt_admstr.html	Country
AddressCounty	cm/cm_edt_cm_mstr.html	County
AddressCounty	so/so_edt_admstr.html	County
AddressFormat	cm/cm_edt_cm_mstr.html	Format
AddressFormat	so/so_edt_admstr.html	Format
AddressState	cm/cm_edt_cm_mstr.html	State
AddressState	lg/lg_edt_rolcompanyinfo.html	State
AddressState	so/so_edt_admstr.html	State
all-users	email-maintenance	UserID

Related QAD CSS functions:

See page 98.

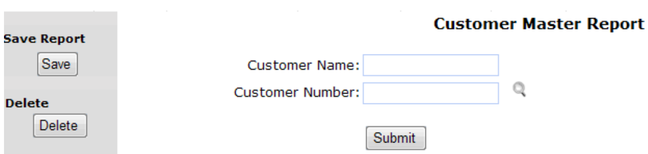
- Browse Maintenance

Customer Master Report

Use Customer Master Report to generate a list of QAD CSS customers and view detailed customer information.

Clicking the Customer Master Report menu option displays the screen in Figure 6.31.

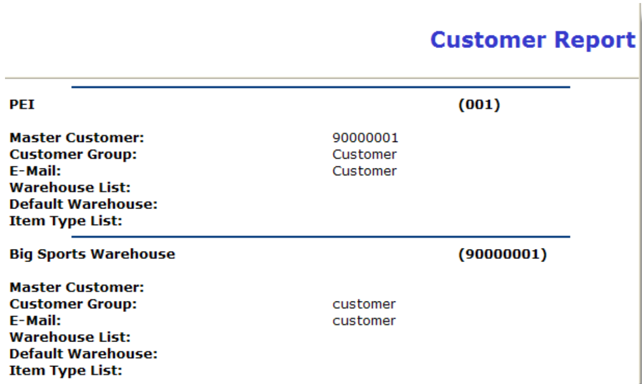
Fig. 6.31
Customer Master Report Request Screen



The Customer Master Report request screen lets users generate a list of customer information using customer name and customer number searches. Search results will only show customers matching the search criteria.

1. Enter a valid customer name for this report. Leave blank to search for all customers.
2. Enter a valid customer number for this report.
3. Click Submit to generate the report.

Fig. 6.32
Customer Report



Related QAD CSS functions:

See page 33.

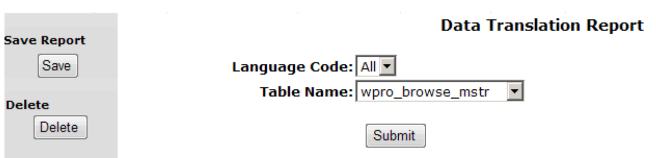
- Customer Maintenance

Data Translation Report

Use Data Translation Report to view the language code or codes assigned to data translation fields in specified QAD CSS database tables.

Clicking the Data Translation Report menu option displays the screen in Figure 6.33.

Fig. 6.33
Data Translation Report Request Screen



The Data Translation Report request screen lets users generate a list of fields available for translation using language code and table name searches. Search results will only show fields matching the search criteria.

1. Select one of the valid language codes to include in the search. Select All to search for all languages.
2. Select the name of a database table.
3. Click Submit to generate the report.

Fig. 6.34
Data Translation Report Detail

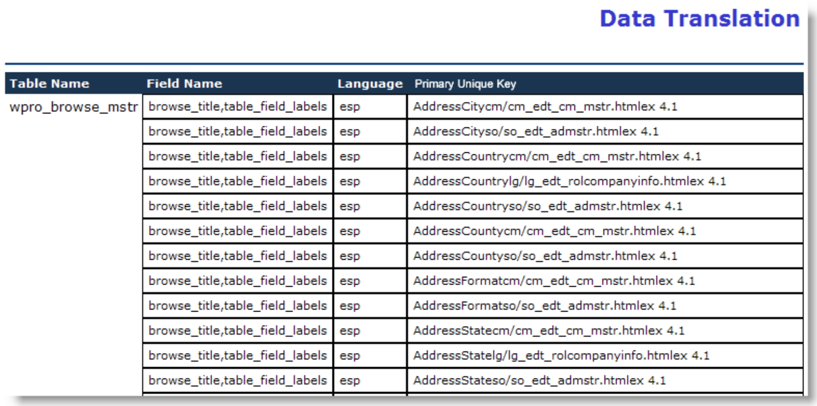

Data Translation

Table Name	Field Name	Language	Primary Unique Key
wpro_browse_mstr	browse_title,table_field_labels	esp	AddressCitycm/cm_edt_cm_mstr.htmlex 4.1
	browse_title,table_field_labels	esp	AddressCityso/so_edt_admstr.htmlex 4.1
	browse_title,table_field_labels	esp	AddressCountrycm/cm_edt_cm_mstr.htmlex 4.1
	browse_title,table_field_labels	esp	AddressCountrylg/lg_edt_rolcompanyinfo.htmlex 4.1
	browse_title,table_field_labels	esp	AddressCountryso/so_edt_admstr.htmlex 4.1
	browse_title,table_field_labels	esp	AddressCountycm/cm_edt_cm_mstr.htmlex 4.1
	browse_title,table_field_labels	esp	AddressCountyso/so_edt_admstr.htmlex 4.1
	browse_title,table_field_labels	esp	AddressFormatcm/cm_edt_cm_mstr.htmlex 4.1
	browse_title,table_field_labels	esp	AddressFormatso/so_edt_admstr.htmlex 4.1
	browse_title,table_field_labels	esp	AddressStatecm/cm_edt_cm_mstr.htmlex 4.1
	browse_title,table_field_labels	esp	AddressStatelg/lg_edt_rolcompanyinfo.htmlex 4.1
	browse_title,table_field_labels	esp	AddressStateso/so_edt_admstr.htmlex 4.1

Related QAD CSS functions:

See page 136.

- Data Translation Fields

See page 138.

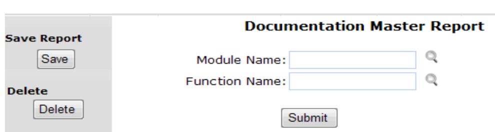
- Language Control Maintenance

Documentation Master Report

Use Documentation Master Report to view detailed programming information about QAD CSS modules and their associated functions.

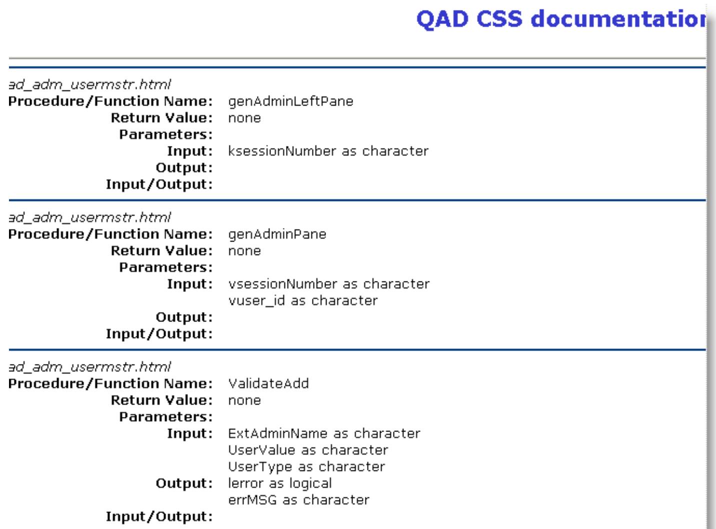
Clicking the Documentation Master Report menu option displays the screen in Figure 6.35.

Fig. 6.35
Documentation Master Report Request Screen



1. Speicify a valid QAD CSS system module to include in the search. Leave blank to search for all modules.
2. Speicify a valid function corresponding to a QAD CSS module to include in the search. Leave blank to include all functions.
3. Click Submit to generate the report.

Fig. 6.36
QAD CSS Documentation Report


QAD CSS documentatio

ad_adm_usermstr.html
Procedure/Function Name: genAdminLeftPane
Return Value: none
Parameters:
Input: ksessionNumber as character
Output:
Input/Output:

ad_adm_usermstr.html
Procedure/Function Name: genAdminPane
Return Value: none
Parameters:
Input: vsessionNumber as character
vuser_id as character
Output:
Input/Output:

ad_adm_usermstr.html
Procedure/Function Name: ValidateAdd
Return Value: none
Parameters:
Input: ExtAdminName as character
UserValue as character
UserType as character
Output: lerror as logical
errMSG as character
Input/Output:

Related QAD CSS functions:

See page 117.

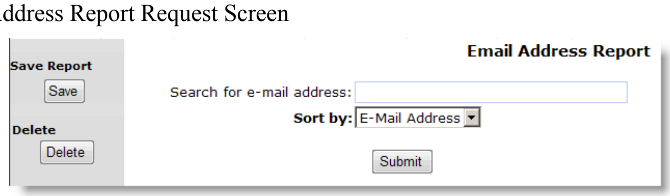
- System Module Maintenance

E-Mail Address Report

Use E-Mail Address Report to generate a list of QAD CSS users and their e-mail addresses as defined in the QAD CSS user table. This report is useful to find a user name with the corresponding e-mail address.

Clicking the E-Mail Address Report menu option displays the screen in Figure 6.37.

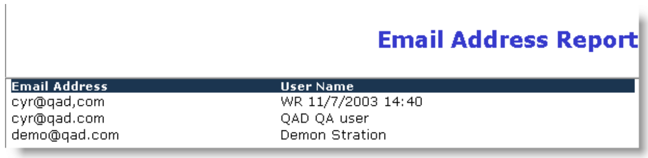
Fig. 6.37
E-Mail Address Report Request Screen



The E-Mail Address Report request screen lets users find e-mail listings using e-mail address searches. Search results will only show e-mail addresses matching the search criteria.

1. Enter part or all of the e-mail address for the report.
2. Select the method for sorting the data in the report.
3. Click Submit to generate the report according to the selection criteria.

Fig. 6.38
E-Mail Address Report Detail


Email Address Report

Email Address	User Name
cyr@qad,com	WR 11/7/2003 14:40
cyr@qad.com	QAD QA user
demo@qad.com	Demon Stration

Related QAD CSS functions:

See page 46.

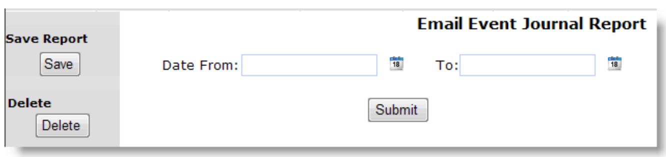
- User Maintenance

E-Mail Event Journal Report

Use E-Mail Event Journal Report to view e-mail notifications automatically generated when an e-mail event occurs.

Clicking the E-Mail Event Journal Report menu option displays the screen in Figure 6.39.

Fig. 6.39
E-Mail Event Journal Report Request Screen

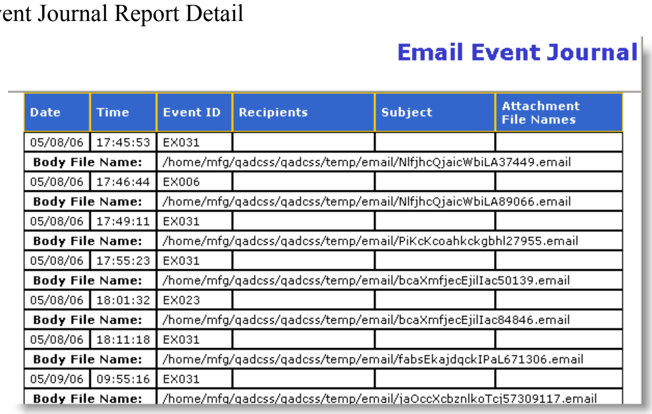


1 Enter all or part of the date range to include in the search. Leave blank to search for all e-mail events.

2 Click Submit to generate the report.

The search results in a screen similar to E-Mail Event Journal Report Detail.

Fig. 6.40
E-Mail Event Journal Report Detail


Email Event Journal

Date	Time	Event ID	Recipients	Subject	Attachment File Names
05/08/06	17:45:53	EX031			
Body File Name:		/home/mfg/qadcss/qadcss/temp/email/NlfjhcQjaicWbiLA37449.email			
05/08/06	17:46:44	EX006			
Body File Name:		/home/mfg/qadcss/qadcss/temp/email/NlfjhcQjaicWbiLA89066.email			
05/08/06	17:49:11	EX031			
Body File Name:		/home/mfg/qadcss/qadcss/temp/email/PiKcKcoahkckgbhl27955.email			
05/08/06	17:55:23	EX031			
Body File Name:		/home/mfg/qadcss/qadcss/temp/email/bcaXmfjecEjilIac50139.email			
05/08/06	18:01:32	EX023			
Body File Name:		/home/mfg/qadcss/qadcss/temp/email/bcaXmfjecEjilIac84846.email			
05/08/06	18:11:18	EX031			
Body File Name:		/home/mfg/qadcss/qadcss/temp/email/fabsEkajdqckIPaL671306.email			
05/09/06	09:55:16	EX031			
Body File Name:		/home/mfg/qadcss/qadcss/temp/email/jaOccXcbznlkoTcj57309117.email			

Related QAD CSS functions:

See page 146.

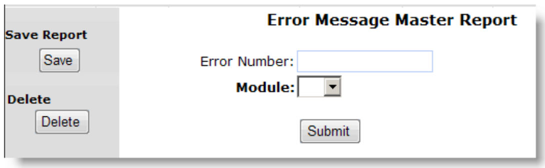
- E-Mail Master Maintenance

Error Message Master Report

Use Error Message Master Report to view error messages and their corresponding error actions generated by certain events in QAD CSS modules.

Clicking the Error Message Master Report menu option displays the screen in Figure 6.41.

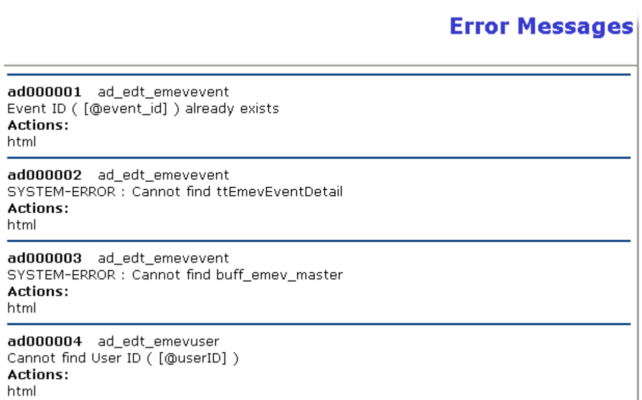
Fig. 6.41
Error Message Master Report Request Screen



The Error Message Master Report request screen lets users view system errors using error number and QAD CSS module searches. Search results only show error messages matching the search criteria.

1. Enter all or part of an error number to include in the search. Leave blank to search for all error messages.
2. Enter the name of a valid module to include in the search or select it from the drop-down list. It is a specific QAD CSS module from which errors were generated. This field is required.
3. Click Submit to generate the report.

Fig. 6.42
Error Messages Report



Related QAD CSS functions:

See page 151.

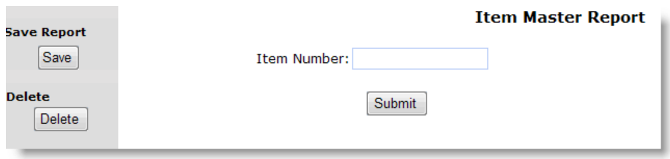
- Error Message Maintenance

Item Master Report

Use Item Master Report to view items and their corresponding prices that customers can order through the QAD CSS Web order-entry system.

Clicking the Item Master Report menu option displays the screen in Figure 6.43.

Fig. 6.43
Item Master Report Request Screen

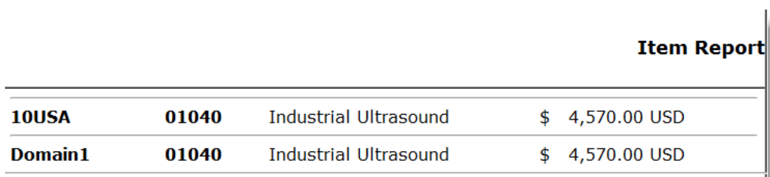


The Item Master Report request screen lets users find items using item number searches. Search results will only show items matching the search criteria.

1 Enter all or part of a valid item number to include in the search. Leave blank to search for all items.

2 Click Submit to generate the report.

Fig. 6.44
Item Report


Item Report

10USA	**01040**	Industrial Ultrasound	$ 4,570.00 USD
Domain1	**01040**	Industrial Ultrasound	$ 4,570.00 USD

Related QAD CSS functions:

See page 36.

- Customer Item Maintenance

See page 63.

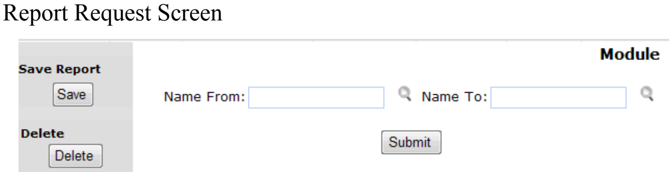
- Item Types Maintenance

Module Report

Use Module Report to view the configuration settings of QAD CSS modules.

Clicking the Module Report menu option displays the screen in Figure 6.45.

Fig. 6.45
Module Report Request Screen

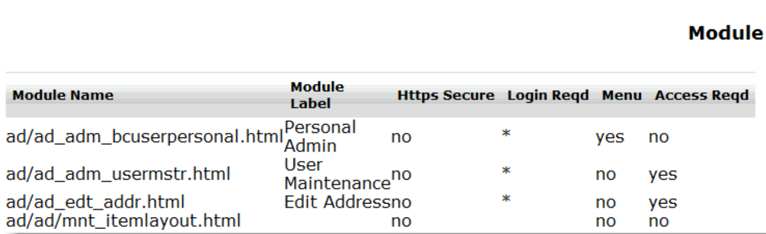


The Module Report request screen lets users find module configuration settings using a module name search. Search results will only show modules matching the search criteria.

1 Enter all or part of a module name range to include in the search. Leave blank to search for all QAD CSS modules.

2 Click Submit to generate the report.

Fig. 6.46
Module Details



Module

Module Name	Module Label	Https Secure	Login Reqd	Menu	Access Reqd
ad/ad_adm_bcuserpersonal.html	Personal Admin	no	*	yes	no
ad/ad_adm_usermstr.html	User Maintenance	no	*	no	yes
ad/ad_edt_addr.html	Edit Address	no	*	no	yes
ad/ad/mnt_itemlayout.html		no		no	no

Related QAD CSS functions:

See page 117.

- System Module Maintenance

See page 70.

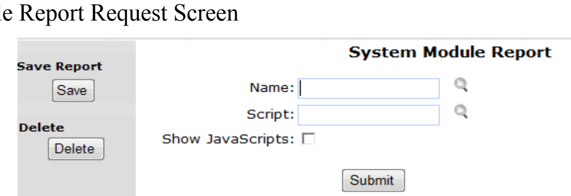
- Menu Maintenance

System Module Report

Use System Module Report to view JavaScript documents associated with QAD CSS modules.

Clicking the System Module Report menu option displays the screen in Figure 6.47.

Fig. 6.47
System Module Report Request Screen



1 Specify a valid QAD CSS module to include in the search. Leave blank to search for all modules.

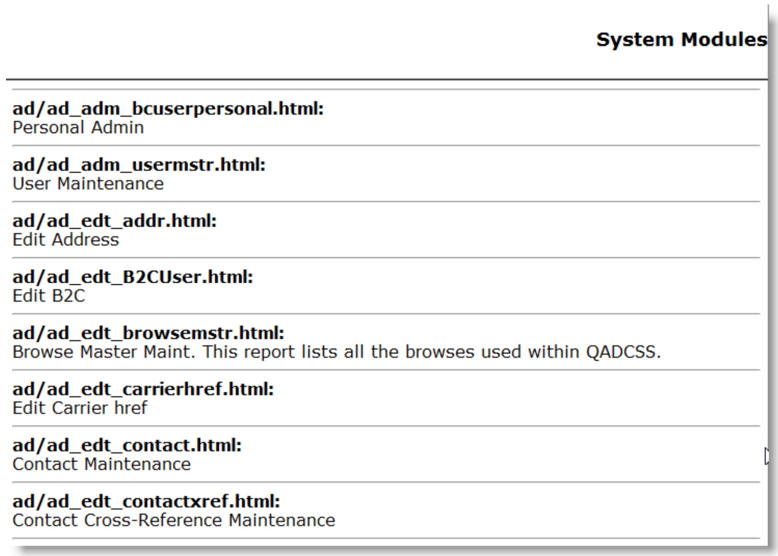
2 Specify a valid JavaScript file to include in the search. Leave blank to include all JavaScripts.

3 Indicate whether you want to show all JavaScripts related to the module.

4 Click Submit to generate the report.

When JavaScript details are included, the search results in a screen similar to Figure 6.48.

Fig. 6.48
System Modules Report



Related QAD CSS functions:

See page 117.

- System Module Maintenance

See page 121.

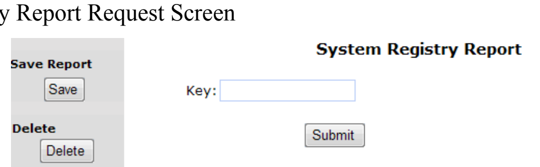
- JavaScript Maintenance

System Registry Report

Use System Registry Report to generate a list of QAD CSS keys defined in the system registry and their corresponding values.

Clicking the System Registry Report menu option displays the screen in Figure 6.49.

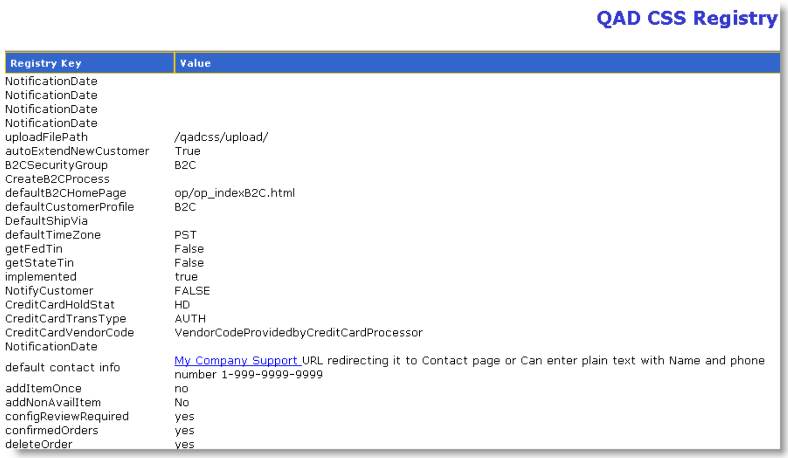
Fig. 6.49
System Registry Report Request Screen



The System Registry Report request screen lets users find keys using a key name search. Search results will only show keys matching the search criteria.

1. Enter all or part of a valid QAD CSS registry key to include in the search. Leave blank to search for all registry keys.
2. Click Submit to generate the report.

Fig. 6.50
QAD CSS Registry Report



QAD CSS Registry

Registry Key	Value
NotificationDate	
NotificationDate	
NotificationDate	
NotificationDate	
uploadFilePath	/qadcss/upload/
autoExtendNewCustomer	True
B2CSecurityGroup	B2C
CreateB2CProcess	
defaultB2CHomePage	op/op_indexB2C.html
defaultCustomerProfile	B2C
DefaultShipVia	
defaultTimeZone	PST
getFedTin	False
getStateTin	False
implemented	true
NotifyCustomer	FALSE
CreditCardHoldStat	HD
CreditCardTransType	AUTH
CreditCardVendorCode	VendorCodeProvidedbyCreditCardProcessor
NotificationDate	
default contact info	My Company Support URL redirecting it to Contact page or Can enter plain text with Name and phone number 1-999-9999-9999
addItemOnce	no
addNonAvailItem	No
configReviewRequired	yes
confirmedOrders	yes
deleteOrder	yes

Related QAD CSS functions:

See page 89.

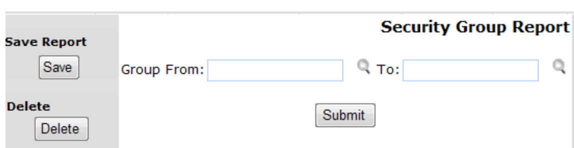
- System Registry Maintenance

Security Group Report

Use Security Group Report to view security groups set up in QAD CSS.

Clicking the Security Group Report menu option displays the screen in Figure 6.51.

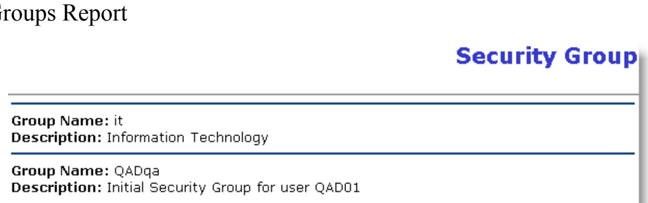
Fig. 6.51
Security Group Report Request Screen



1. Enter all or part of a security group range to include in the search. Leave blank to search for all security groups.

2. Click Submit to generate the report.

Fig. 6.52
Security Groups Report



Security Group

Group Name: it
Description: Information Technology

Group Name: QADqa
Description: Initial Security Group for user QAD01

Related QAD CSS functions:

See page 41.

- Security Group Maintenance

Super Layer Report

Use Super Layer Report to view super layer module associations defined in QAD CSS and the loading information defined for the super layers.

Clicking the Super Layer Report menu option displays the screen in Figure 6.53.

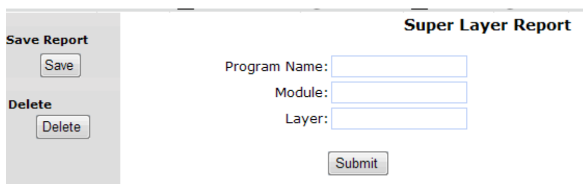


Fig. 6.53
Super Layer Report Request Screen

1. Enter a valid QAD CSS program name to include in the search. Leave blank to search for all programs.
2. Enter the name of a valid QAD CSS module to include in the search. Leave blank to include all modules.
3. Enter the name of a valid layer to include in the search. Leave blank to search for all layers.

   The layer corresponding to the placement of the program:

   - Extended
   - User Interface
   - Adapter
4. Click Submit to generate the report.

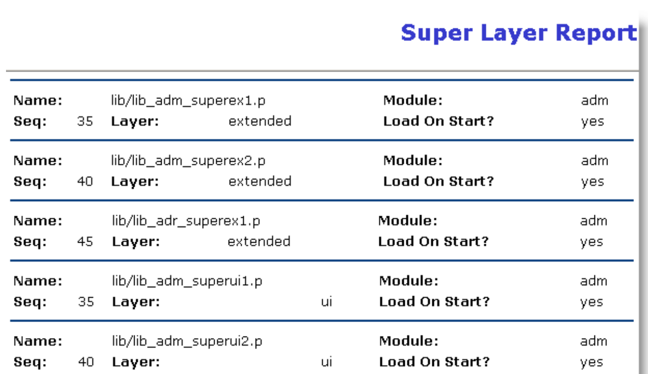


Fig. 6.54
Super Layer Report Details

Related QAD CSS functions:

See page 111.

- Super Layer Maintenance

Transaction History Report

The Transaction History Report lets administrators display and review all Web site transactions. The activities for each visitor can be logged and reviewed.

As users navigate through the site, QAD CSS captures session information such as:

- The pages visited
- The duration of the visit on each page
- Page/form information
- HTML information passed from page to page

This report also lets administrators purge selected transactions from the transaction table to manage table and database size. The data for this report comes from the QAD CSS Transaction table.

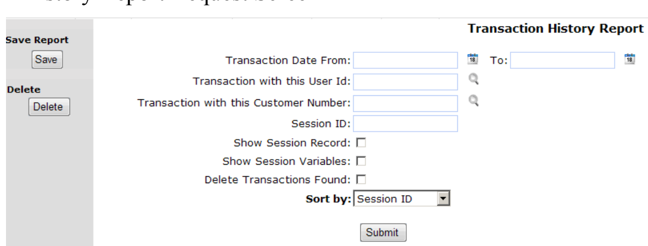
See page 113.

Transaction logging is controlled from the System Control Maintenance screen.

Important Transaction logging creates a large volume of records in the Transaction table. This consumes disk resources if not maintained. Make sure to periodically purge old transaction entries by deleting records from the Transaction table when running this function.

Clicking the Transaction Report menu option displays the screen in Figure 6.55.

Fig. 6.55
Transaction History Report Request Screen



The Transaction History Report request screen lets users find orders using transaction date, user ID, customer ID, and session ID searches. Search results will only show the orders matching the search criteria.

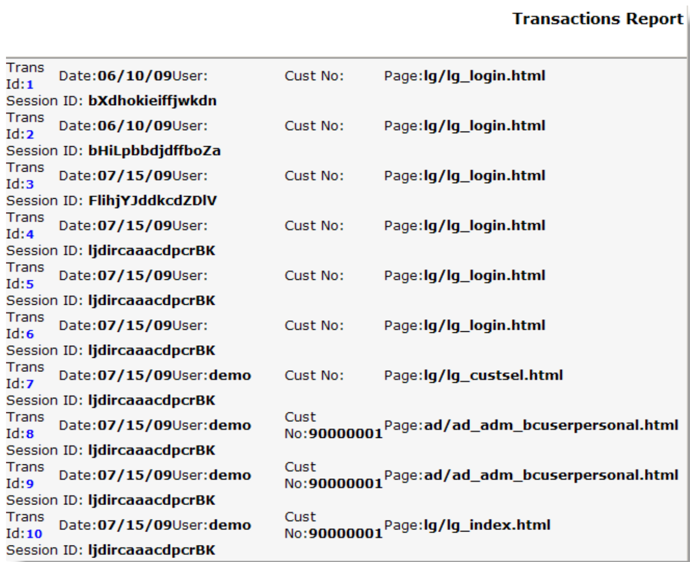
1. Enter a valid date range or use the calendar browse to find a date range.
2. Enter a valid user ID to limit the report to transactions for that user only.
3. Enter a valid customer number to limit the report to transactions for that customer only.
4. Indicate whether to show session information for the transactions. Select the Show Session Record option when you want to display the values stored in the session record at the time the page was requested.
5. Indicate whether to show session variable information of the transactions. Select the Show Session Variable option when you want to display the values of all the HTML form fields.
6. Indicate whether to delete the transactions no longer needed. Select the Delete Transactions Found option when you want to delete the transactions shown on the report.

Important If selection criteria are not specified, the system deletes all transactions when this option is selected.

7 Select the Sort By method for the report.

8 Click Submit to generate the report according to the selection criteria.

Fig. 6.56
Transactions Report



Transactions Report

Trans Id:1 Date:06/10/09 User: Cust No: Page:lg/lg_login.html
Session ID: bXdhokieiffjwkdn
Trans Id:2 Date:06/10/09 User: Cust No: Page:lg/lg_login.html
Session ID: bHiLpbbdjdffboZa
Trans Id:3 Date:07/15/09 User: Cust No: Page:lg/lg_login.html
Session ID: FlihjYJddkcdZDlV
Trans Id:4 Date:07/15/09 User: Cust No: Page:lg/lg_login.html
Session ID: ljdircaaacdpcrBK
Trans Id:5 Date:07/15/09 User: Cust No: Page:lg/lg_login.html
Session ID: ljdircaaacdpcrBK
Trans Id:6 Date:07/15/09 User: Cust No: Page:lg/lg_login.html
Session ID: ljdircaaacdpcrBK
Trans Id:7 Date:07/15/09 User:demo Cust No: Page:lg/lg_custsel.html
Session ID: ljdircaaacdpcrBK
Trans Id:8 Date:07/15/09 User:demo Cust No:90000001 Page:ad/ad_adm_bcuserpersonal.html
Session ID: ljdircaaacdpcrBK
Trans Id:9 Date:07/15/09 User:demo Cust No:90000001 Page:ad/ad_adm_bcuserpersonal.html
Session ID: ljdircaaacdpcrBK
Trans Id:10 Date:07/15/09 User:demo Cust No:90000001 Page:lg/lg_index.html
Session ID: ljdircaaacdpcrBK

Report Links

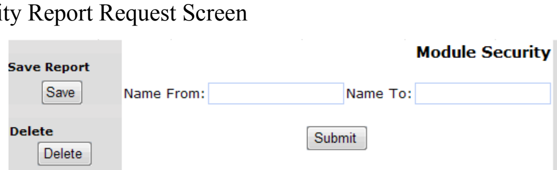
The Transaction report provides a transaction number link to view complete details about the transaction. Clicking this link displays the session record and session variables and thus is useful when the report is run without details.

Module Security Report

Use Module Security Report to view security groups associated with QAD CSS modules.

Clicking the Module Security Report menu option displays the screen in Figure 6.57.

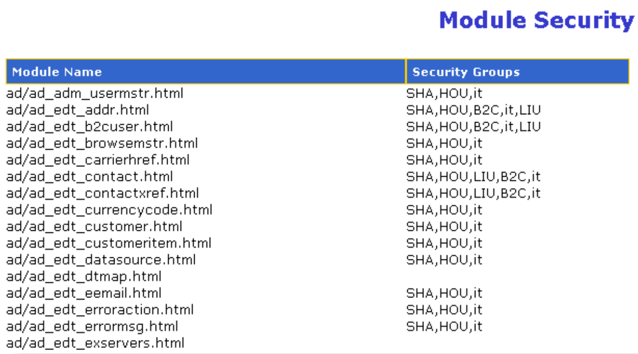
Fig. 6.57
Module Security Report Request Screen



1 Enter the range of module names to include in the report. Leave blank to include all modules defined in the system.

2 Click Submit to generate the report.

Fig. 6.58
Module Security


Module Security

Module Name	Security Groups
ad/ad_adm_usermstr.html	SHA,HOU,it
ad/ad_edt_addr.html	SHA,HOU,B2C,it,LIU
ad/ad_edt_b2cuser.html	SHA,HOU,B2C,it,LIU
ad/ad_edt_browsemstr.html	SHA,HOU,it
ad/ad_edt_carrierhref.html	SHA,HOU,it
ad/ad_edt_contact.html	SHA,HOU,LIU,B2C,it
ad/ad_edt_contactxref.html	SHA,HOU,LIU,B2C,it
ad/ad_edt_currencycode.html	SHA,HOU,it
ad/ad_edt_customer.html	SHA,HOU,it
ad/ad_edt_customeritem.html	SHA,HOU,it
ad/ad_edt_datasource.html	SHA,HOU,it
ad/ad_edt_dtmap.html	
ad/ad_edt_eemail.html	SHA,HOU,it
ad/ad_edt_erroraction.html	SHA,HOU,it
ad/ad_edt_errormsg.html	SHA,HOU,it
ad/ad_edt_exservers.html	

Related QAD CSS functions:

See page 117.

- System Module Maintenance

User Master Report

User Master Report lets administrators generate a list of QAD CSS users and, optionally, customers and their e-mail addresses. This report is useful for finding a user or customer name with the corresponding e-mail address.

Clicking the User Master Report menu option displays the screen in Figure 6.59.

Fig. 6.59
User Master Report Request Screen

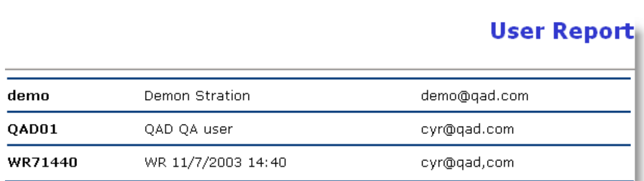
1 Enter a valid user ID to include in the search. Leave blank to search for all users.

2 Select how the data in the report is sorted.

3 Indicate whether to include customers in the search.

4 Click Submit to generate the report.

Fig. 6.60
User Report


User Report

demo	Demon Stration	demo@qad.com
QAD01	QAD QA user	cyr@qad.com
WR71440	WR 11/7/2003 14:40	cyr@qad,com

Related QAD CSS functions:

See page 46.

- User Maintenance

See page 33.

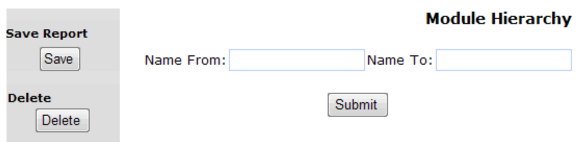
- Customer Maintenance

Module Hierarchy Report

Use Module Hierarchy Report to view QAD CSS module hierarchy.

Clicking the Module Hierarchy Report menu option displays the screen in Figure 6.61.

Fig. 6.61
Module Hierarchy Report Request Screen



1 Enter the range of module names to include in the report. Leave blank to include all modules defined in the system.

2 Click Submit to generate the report.

Fig. 6.62
Module Hierarchy Report

Related QAD CSS functions:

See page 117.

- System Module Maintenance

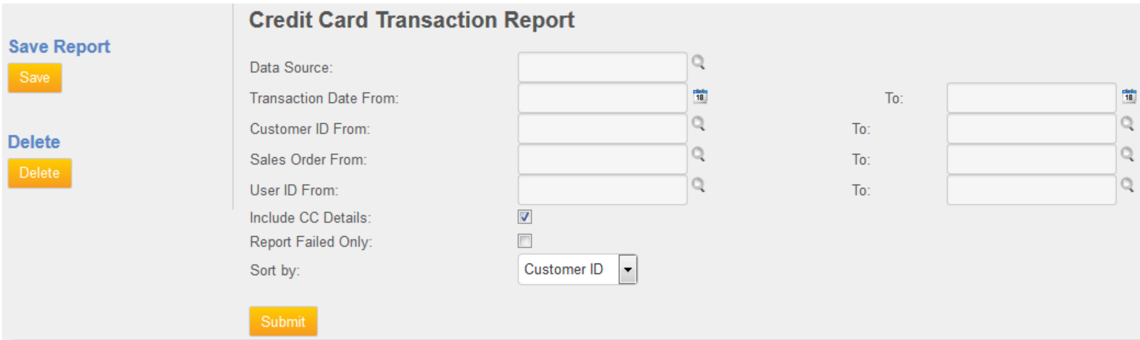
Credit Card Transaction Report

Use Credit Card Transaction Report to view credit card transaction information.

Note To use this report, select the Transaction Log will be kept option in Credit Card Vendor Maintenance.

Clicking the Credit Card Transaction Report menu option displays the screen in Figure 6.63.

Fig. 6.63
Credit Card Transaction Report Request Screen



1 Enter all or part of the transaction date range for the report.

2 Enter the customer ID range for the report.

3 Enter the sales order number range for the report.

4 Enter the user ID range for the report.

5 Indicate whether to include credit card details in the report.

6 Indicate whether to only include failed credit card transactions in the report.

7 Select the method for sorting the data in the report.

8 Click Submit to generate the report.

Fig. 6.64
Credit Card Transaction Report

Appendix A

System Registry Fields

This appendix includes a brief description of the various registry fields that can be set in System Registry Maintenance and how they affect the system.

Registry Settings

Much of the way buyers interact with QAD CSS is managed through registry settings defined in System Registry Maintenance.

The tables in this appendix list the various registry fields and associated information. Field information is organized based on the area (module) within QAD CSS that the field affects. These areas are:

- B2C, Business-to-Customer
- CC, Credit Card
- Customer Contacts
- Clearance, License Registration
- OP, Order Processing
- Paths, Directory settings
- Sys, General system settings

Each table displays the following data:

Key: The name of the registry field.

Default: The default value supplied at installation. Some defaults are blank. Each installation can modify defaults as needed.

Override: The default setting of the Override field associated with the registry field. When Override is Yes, the system will continue to look for other instances of this field value that are set up for various groups such as marketing groups or security groups.

Usage: A brief description of how the field affects the operation of the system. In some cases, fields may apply differently in a B2C or B2B implementation.

The following conventions are used when specifying registry values:

- Use the caret (^) symbol to separate multiple items that apply to one field (see "orderHeaderInfoLayout" on page 211).
- Use the pipe symbol (|) to separate a code from its value (see "paymentOptions" on page 212).

Table A.1 Business-to-Customer (B2C) Registry Fields (Page 1 of 3)

Key	Default	Over	Usage
autoExtendNewCustomer	False	No	This setting determines when the customer account is created in QAD EA. True: A customer record is created in QAD EA when the order is submitted. False: At order submission, temporary records are created in QAD CSS. These can be reviewed by an administrator who then submits them to QAD EA. Set this field to False during initial implementation to monitor orders and customers before they are created in QAD EA.
B2CSecurityGroup	B2C	No	This setting defines the default security group for B2C users. You create this group during implementation and associate it menus and menu buttons do determine which areas of your site B2C users can access. By default, this field is set to B2C.

Table A.1 Business-to-Customer (B2C) Registry Fields (Page 2 of 3)

Key	Default	Over	Usage
createB2CProcess		No	This setting determines when the customer account is created in QAD EA. Auto: A customer record is created in QAD EA when the order is submitted. Blank: At order submission, temporary records are created in QAD CSS. These can be reviewed by an administrator who then submits them to QAD EA. This setting is referenced in the `lg/lg_newloginstart.html` page, which is an alternate way for letting B2C users register.
defaultCustomerProfile	B2C	No	This setting determines the QAD EA customer that B2C shoppers are associated with before they have logged in or registered. This customer is used for creating sales quotes during the order-entry process to establish pricing and taxes. You create this customer record in QAD EA during implementation and then associate it with a default B2C user account in QAD CSS. Values associated with the QAD CSS user associated with the QAD EA B2C customer specified as *defaultCustomerProfile* also supply values for fields such as marketing group when a new user record is created during registration.
defaultB2CHomePage	../op/op_index B2C.html	No	The default B2C user's home page. B2C users are not typically required to log in like B2B users, since they do not necessarily have a defined user account. You can use this field to redirect B2C users to another type of start page.
DefaultLangForB2CCust	English	No	This setting sets the customer default language code.
defaultShipVia		No	This setting determines the ship via code associated with new customer records (cm_shipvia) created in QAD EA as part of extending customers in a B2C scenario. Make sure that this value is defined in Generalized Codes Maintenance (36.2.13) in QAD EA to avoid validation errors in Customer Maintenance (2.1.1).
defaultTimeZone	PST	No	This setting defines the default time zone code associated with temporary address records created in QAD CSS.
getFedTin	False	No	This setting is used when creating temporary addresses during the order quote process to indicate that the state taxpayer identification number should be used. Set this to True when QAD EA tax calculations are performed through the Sales and Use Tax Interface to Vertex's Quantum system.
getStateTin	False	No	This setting is used when creating temporary addresses during the order quote process to indicate that the state taxpayer identification number should be used. Set this to True when QAD EA tax calculations are performed through the Sales and Use Tax Interface to Vertex's Quantum system

Table A.1 Business-to-Customer (B2C) Registry Fields (Page 3 of 3)

Key	Default	Over	Usage
implemented	True	No	Indicates that the B2C module is active.
notifyCustomer	False	No	This setting controls the display of a check box asking B2C shoppers if they would like to receive information about updates and specials. Currently, no functionality is associated with this field, but it could be added with custom programming.

Table A.2 Credit Card Registry Fields

Key	Default	Over	Usage
confirmedOrders	Yes	No	This setting determines if orders are entered as confirmed.
creditCardHoldStat	HD	No	Specify the two-character hold code status indicating that an order is on hold because the customer has exceeded their credit limit. If this registry setting is not defined, CC is used by default. When an order is on credit hold, QAD CSS sets the hold status in the order header to this value. When the order is created in QAD EA, the QAD EA default hold status is used. In QAD EA, any non-blank value in the Action Status field indicates that the order is on credit hold
creditCardVendorCode	VendorCodeProvidedbyCreditCardProcessor	No	This setting determines which record created in Credit Card Vendor Maintenance that the system should use when implementing the API for creating credit card transactions. Since you can set up more than one record in this maintenance program, the system uses the registry setting to determine which record is active. This field is used only when credit cards are implemented. Its value depends on the way your company is identified with your credit card service provider.

Table A.3 Clearance Registry Fields

Key	Default	Over	Usage
notificationDate		No	Stores the date that the site was cleared. Not currently implemented.

Table A.4 Customer Contact Registry Fields

Key	Default	Over	Usage
default Contact Info	<A HREF= "http://www.yoururl.com"> My Company Support URL redirecting it to Contact page or Can enter plain text with Name and phone number 1-999-9999-9999	No	This field stores the default contact information displayed when a buyer clicks the Contact Us button.

Table A.5 Order Processing Registry Fields (Page 1 of 16)

Key	Default	Over	Usage
addAll	No	No	This setting determines whether to display the All All Selected Items button on the Order Entry page so that the user can add multiple items to the shopping cart all at once.
addItemOnce	No	No	This setting determines if buyers can add the same item number only once to their cart. Setting this to No minimizes errors and is recommended unless there is a good business reason to prevent the addition of the same item more than once. Note that this setting does not apply for configurable items defined in QAD Configurator.
addNonAvailItem	No	No	This setting determines whether buyers can add items to the cart that are not defined in QAD CSS (wpro_cust_item table). This setting affects heads-down order entry and the Express Order cart. Setting this field to Yes is a way of letting users order memo items. However, this can create problems later in order processing. To implement a complete process that supports memo items may require additional customizations. If you set this field to Yes, you should set deleteUnavailableItem to No.
deleteUnavailableItem	Yes	No	This setting is currently not implemented. This setting determines whether items that do not exist in QAD CSS are deleted from the shopping cart. This setting is required in addition to addNonAvailItem to manage memo items since QAD CSS lets items be added to a cart indirectly such as through copying an old order or using an order template. When this field is Yes, any items that do not exist are immediately removed from the cart.
configReviewRequired	Yes	No	This setting determines how customers interact with the system when they place configured items in their carts. When it is set to Yes, an icon displays next to a configured item when it is put in the cart. Buyers can click on the icon to validate the features and options. They then click Update Shopping Cart when they are satisfied with the configuration.
custDldTimeExceed	1000		This setting determines the maximum time, in milliseconds, allowed for the customer records to be downloaded to a csv file.

Table A.5 Order Processing Registry Fields (Page 2 of 16)

Key	Default	Over	Usage
deleteOrder	Yes	No	This setting determines whether submitted orders are deleted by the system. In normal order processing, an order is submitted by the buyer. The system validates the order and creates a file that is used to update QAD EA. When the order is successfully saved in QAD EA, the status of the order is changed to submitted. If Archive Orders is Yes in Order Control Maintenance, the order is copied to the archive table and then deleted from QAD CSS. Otherwise, it is deleted without archiving. You can use this registry setting to prevent the system from deleting submitted orders for a particular user. This might be needed to troubleshoot a problem a user is having.
finditOE	OE2	No	This setting determines which page displays when the buyer searches from the main QAD CSS home page. OE1: The system loads `op/op_item_lookup.html`. OE2: The system loads `op/op_index.html`.
getPriceOfConfigParts	Yes	No	This setting determines if the price of configured items is calculated and displayed in the catalog.
getPriceOfConfigPartsinCart	Yes	No	This setting determines if the price of configured items is calculated and displayed in the shopping cart.
getPriceOnAdd	Yes	No	Not currently implemented. Instructs the system to recalculate the price of an item when it is added to the cart.
hideOrderEntry	No	No	When Yes, order entry does not display on the menu for customers on credit hold.

Table A.5 Order Processing Registry Fields (Page 3 of 16)

Key	Default	Over	Usage
indexOrderHome	CAT2	No	This setting determines what displays on the main OE2 page. CAT1 and CAT2 determine the level of catalog entries that display in the left pane; these settings are mutually exclusive. MESSAGE, STATUS, and MOTD affect the content of the center pane. These can be used in any combination and determine the order in which the content displays. • CAT1 displays all distinct product categories in the product catalog. • CAT2 display only category 2 level items in the product catalog. • MESSAGE displays any messages created for the logged-in user in User Message Maintenance. • STATUS displays orders previously placed by the buyer and the order status. indexOrderStatusHistory determines how many days of history display. • MOTD displays either any messages of the day defined in Message Maintenance for the current date or a message defined for a marketing group associated with the current user's customer.
itemDetailPgm	../op/op_itemdetail.html	No	This setting specifies the program to run when a buyer clicks a detail hyperlink in the catalog. • Specify `../op/op_itemimage.html` for pop-up (the default). • Specify `../op/op_itemdetail.html` for a new HTML page.
itemDetailStyle	inline	No	This setting specifies how the detail page is displayed when a buyer clicks a hyperlink to display detailed information in the catalog. Specify one of the following: • Inline displays a new HTML page. • Popup displays a smaller window.
itemQuantityFormat	->>>>>9.99	No	This setting determines the format and length of the Item Quantity field that display in the three order entry pages and the shopping cart (getCurItems, Item_detail, bcItem_confirm, and bchdo_entry).
itemQuantityShow	8	No	This setting determines how many digits are shown in the Quantity field for OE1, OE2, and HDO.
itemTable.char1	No	No	Not currently used.

Table A.5 Order Processing Registry Fields (Page 4 of 16)

Key	Default	Over	Usage
itemTypesLabel0-eng	Top Categories	No	This setting determines the label1 in the OE1 index page when the language is English. This and the following related label let implementers adopt the specific terminology required at each site. If you are implementing multiple languages, you must create a corresponding registry entry for that language. For example, if you implement French (frf), create itemTypesLabel0-frf.
itemTypesLabel1-eng	Subcategory 1	No	This setting determines label 2 in the OE1 index page when the language is English.
itemTypesLabel2-eng	Subcategory 2	No	This setting determines label 3in the OE1 index page when the language is English.
itemTypesLabel3-eng	Subcategory 3	No	This setting determines label 4 in the OE1 index page when the language is English.
itemTypesLabel4-eng	Subcategory 4	No	This setting determines label 5 in the OE1 index page when the language is English.
ItemTypesTopLabel	Products	No	This setting is not currently used. It has been replaced by the language-specific version.
itemTypesTopLabel-eng	Products	No	This setting determines the title in the OE1 index page for the top label of item categories when the language is English.
maxOrderLines	0	No	This setting determines the maximum number of lines users can add to the shopping cart. Set this to 0 if the number of lines is unlimited.
OEHome	op/op_itemlookup.html	No	This setting determines which order-entry page to display when the order-entry process is complete or when an order-entry page has not been found some other way. The default is OE1. During user login, QAD CSS determines this value and adds it to the user’s session variables. If the user chooses a different order entry, the session variable is updated and the updated value then applies to the session. The registry value determines the initial default only. A default may be needed when a buyer requests an order-entry page indirectly. For example, the buyer could access the reports menu, copy an order (see reportOrderCopy), view the cart, and then click Continue Shopping. The system then needs to know which order-entry page to display.
orderEntryRightUI	Both	No	This setting determines whether item number, or item description, or both are displayed on the Express Order panel, which is on the right side of the order entry 2 page. Number: Only item number is displayed. Description: Only item description is displayed. Both: Both item number and description are displayed.

Table A.5 Order Processing Registry Fields (Page 5 of 16)

Key	Default	Over	Usage
orderHeadCommit		No	This setting determines the type value of comments associated with the order header. You can leave this blank or specify a type that identifies the comments as being from QAD CSS. Comment types can be validated using generalized codes in QAD EA, so if you specify a type, make sure it will pass validation.
orderLineCommit		No	This setting determines the type value of comments associated with the order lines. See description of orderHeadCommit.
orderHeaderInfoLayout	3,user_id ^request_date ^due_date ^po ^payment_method ^currency ^shipping_method ^order_comments	No	This setting determines the values that display on the order confirmation page. The first number is the number of rows or columns to display, followed by the fields to display. The confirmation page displays after the buyer commits an order and can be printed if needed. In addition to the fields included as defaults, erp_order_number can be used.
orderHeaderInfoLayoutLabels	Placed By^Request Date^Due Date^PO Number^Payment Method^Currency^ Shipping Method^Header Comments	Yes	This setting determines the labels for the fields displayed on the order confirmation page, as determined by orderHeaderInfoLayout. Specify the same number of labels to correspond to the fields.
orderUIMode	Yes	No	This setting determines if an intermediate page displays during checkout before the order confirmation page. The intermediate page displays a message that the system is processing the order. Set this to Yes if the number of items in the cart is typically large or preparing for confirmation takes a long time. This prevents the buyer from thinking that nothing is happening.
orderWhereAmIGoing	../op/op_bcordercon firm2.html	No	This field is normally set to `../op/op_bcorderconfirm2.html`. You can change this to call a different page if you have created a custom page to display before order confirmation.

Table A.5 Order Processing Registry Fields (Page 6 of 16)

Key	Default	Over	Usage
paymentOptions		No	This setting specifies a list of valid payment methods that can be selected in CSS, separated by the caret (^) symbol. The pipe symbol (|) separates the option to display and its value. Currently, two options with fixed values are currently supported: • Credit Card|1 • Purchase Order|2 You cannot change the fixed values of the options, which means that when both options are specified, Credit Card is always displayed before Purchase Order. If you want to specify Purchase Order as the only option, you still need to set the registry value to Purchase Order|2 instead of Purchase Order|1. Other options can be used, but you must modify the code to change processing based on the option selected.
QADUDomain		No	Specify the domain that QAD CSS should use to log in to QAD EA. This field is used with QADUser. A valid user record with access to this domain must be defined in QAD EA User Maintenance (36.3.1).
QADUPasswd		No	Specify the password that QAD CSS should use to log in to QAD EA. This field is used with QADUser. A valid user record with this password must be defined in QAD EA. If you are using password expiration dates as part of your QAD EA security setup, make sure that the system administrator changes the password for this user before the password expires and then updates the *QADUPasswd* setting appropriately. Otherwise, QAD CSS does not start up or integrate correctly with QAD EA.
QADUser	mfg	No	Specify the ID of the user that QAD CSS should use to log in to QAD EA. This user must be defined in QAD EA.
QCartDescTruncate	12	No	This setting controls how many characters of the item description to display in the Express Order cart. The Express Order cart displays on the right pane with a description and quantity. Since this pane is typically narrow, you can control the number of characters to display with this field.

Table A.5 Order Processing Registry Fields (Page 7 of 16)

Key	Default	Over	Usage
quoteOrder	True	Yes	This setting determines if a summary of the order total is displayed before the order is submitted. It is done by creating a sales quote in QAD EA and calculating taxes and freight. This information is then returned to QAD CSS and the sales quote is deleted. When the payment type is credit card, the order is always quoted, regardless of this value. This field is typically set to True in a B2C environment, but also might be set to True in a B2B environment depending on the business requirements.
reportOrderCopy	Yes	No	This setting determines if a buyer can copy an order to create an order. When Yes, a Copy Order link displays in the Order Summary Report generated from the Account Information menu. This lets the buyer take an existing order and copy it into the shopping cart. This feature is typically used in a B2B environment. Reporting is optional in a B2C environment so if you plan to use this feature, you must set up reporting.
runGetAllWhseQty	Yes	No	This setting determines if QAD CSS gets information about the on-hand inventory quantity from QAD EA or from QAD CSS to display with other item details. **Note**: The system looks at this setting only when runGetWhseQty is set to Qty or Text. When No, the value of totQty specified in QAD CSS Customer Item Maintenance displays in the product catalog. When Yes, inventory quantity is calculated based on the setting of three fields in Sales Order Control (7.1.24): • Qty All Reduce Qty Available (soc_all). When Yes, quantity allocated is subtracted from quantity available. When No, quantity available includes all available inventory, regardless of whether it has been allocated. This field is set to Yes if calculation method 1 or 2 is selected in Sales Order Control. • Required Qty Reduce Qty Avail (soc_req). When Yes, quantity required is subtracted from quantity available. When No, quantity available includes all available inventory, regardless of whether it has been required. This field is set to Yes if calculation method 3 or 4 is selected in Sales Order Control. • Qty Avail Include Qty on Order (soc_on_ord). When Yes, quantity on open purchase or work orders is added to quantity available. When No, quantity available includes only available quantity on hand. This field is set to Yes if calculation method 2 or 4 is selected in Sales Order Control.

Table A.5 Order Processing Registry Fields (Page 8 of 16)

Key	Default	Over	Usage
runGetBestPrice	Yes	No	This setting determines if QAD CSS runs the best pricing logic in QAD EA to obtain the price for an item when it is displayed in the product catalog. Items in the shopping cart are priced using best pricing regardless of the setting of this field. Use this setting to optimize performance. If the price is not being displayed in the catalog, setting this field to No prevents the unnecessary processing.
runGetBestPriceConfigParts	Yes	No	This setting determines if QAD CSS runs the best pricing logic in QAD EA to obtain the price for a configured item when it is displayed in the product catalog. Items in the shopping cart are priced using best pricing regardless of the setting of this field. Use this setting to optimize performance. If the price is not being displayed in the catalog, setting this field to No prevents unnecessary processing.
runGetDefWhseQty	Yes	No	This setting determines if QAD CSS gets information about the on-hand inventory quantity for the default site from QAD EA or from QAD CSS to display with other item details. **Note**: The system looks at this setting only when runGetWhseQty is set to Qty or Text. The default site is determined in this order: • A site associated with the customer record in QAD CSS • The site defined in QAD CSS Order Control • The site from cm_mstr record in QAD EA • The site associated with the item in Item Master Maintenance (1.4.1) When this field is Yes, the calculation is similar to that described for runGetAllWhseQty, but only items in the default site are considered. When No, the value of whsQty stored in the QAD CSS Customer Item Master (wpro_cust_item) displays.
runGetMinMaxQty	No	No	This setting determines whether QAD CSS enforces the minimum and maximum order quantity defined in Customer Item Maintenance.

Table A.5 Order Processing Registry Fields (Page 9 of 16)

Key	Default	Over	Usage
runGetWhseQty	Off	No	The setting of runGetWhseQty has three possible values. Off: Do not perform any availability calculation. If the quantity available has been marked to display in Item Layout Maintenance, no value displays on the screen. Qty: Check the value of the runGetAllWhseQty and runGetDefWhseQty settings and display the quantity available based on those settings. Text: Check the value of runGetAllWhseQty and runGetDefWhseQty and display the text contained in one of two configurable messages, indicating that stock is available or unavailable. • OP000244 displays when zero or less quantity is available in all sites. • OP000245 displays when a quantity greater than zero is available in all sites. **Note:** This setting has effect only when qtyavaildefault or qtyavail are marked to display in the product catalog in Item Layout Maintenance.
searchList	Master	Yes	This setting determines whether the user's associated customer ID is used in the search for items: • Master (or blank): Search for items not associated with a customer. It is the default value. • Customer: Search for items associated with the currently logged-in customer or items associated with any customer IDs specified in the Master Customer field for the current customer. If no customer IDs are specified for the Master Customer field, only items associated with the current customer are found.
searchMethod	Contains	No	This setting determines if the search type for item search is whole-word search or substring search. • Contains: Item searches are whole-word searches, where the search term is treated as representing the whole word. • Matches: Item searches are substring searches, where the search term is treated as a substring.
searchSortName	Yes	No	Not currently implemented.
setDueDate	No	No	This setting determines the due date on the Shopping Cart page. The options are: • Yes: Use Header/Line requests in CSS to populate the Header/Line Due Date. • No: Always use the default Due Date calculated by ERP.

Table A.5 Order Processing Registry Fields (Page 10 of 16)

Key	Default	Over	Usage
setReqDate	No	No	This setting determines the default value of the request date the on the Shopping Cart page. The options are: • Yes, and promise dates are being calculated in QAD EA: Order line request date defaults from the calculated order line promise (delivery) date. • Yes, and promise dates are not being calculated: Order line request date defaults from the calculated order line due (ship) date. • No: Order line request dates are blank.
shippingOptions	ERP	No	This field determines the content of the drop-down list associated with the Shipping Method field in the Order Confirmation page. It can have two values: • A list of shipping options to be considered valid during order entry. • ERP, which indicates QAD CSS should use the values defined for the so_shipvia field in Generalized Codes Maintenance in QAD EA. If you choose to create a list, use this format: description1|code1^desc2|code2^desc3|code3... The description displays to the user and the code value is passed to the sales order. If you have set up generalized codes on so_shipvia, all the code values must be valid in QAD EA.
showDeliveryIcon	Yes	No	This setting determines whether the Delivery button is displayed beside the following buttons: • Add button for each item on the product catalog • Add button in the express order cart • Delete button for each line in the shopping cart The setting values are Yes or No.
showDetailImage	Yes	No	This setting determines whether an image is included in the item detail page that displays when buyers click an item in the product catalog.
showDueOrPromDate	PromiseDate	No	This setting determines which dates, if any, display on the order-related reports that can be viewed by customers as well as the order summary page that displays during checkout. PromiseDate: Promise date displays. Both: Both dates display. None: No dates display. (Any other value): Due date displays.
showExtendedPrice	Yes	Yes	This setting determines whether the extended price is displayed in the shopping cart.

Table A.5 Order Processing Registry Fields (Page 11 of 16)

Key	Default	Over	Usage
showGroupImage	LEFT	No	This setting determines where images associated with item categories in Item Types Maintenance display. Possible values are: • LEFT displays image to the left of the text. • RIGHT displays image to the right of the text. • NO does not display an image.
showHDOfromlookup	Yes	No	This setting determines if a link for heads-down order entry displays in the OE1 page. This order-entry method may be more suitable for a B2B environment than for a B2C environment.
showHeaderComments	Yes	No	This setting determines if a field displays so buyers can enter sales order header comments. This may be more applicable to B2B than B2C.
showIndexSearch	Yes	No	For OE2, determines if the item search box displays at the top of the left pane during order entry. showLookupSearch has the same effect for OE1.
showItemListLabels	Yes	Yes	Not currently implemented.
showItemType	Yes	No	Not currently implemented.
showLegendBar	No	Yes	This setting determines if icons associated with an item in the Icon List field of Customer Item Maintenance display below the item description in the catalog and a legend bar displays at the top of the product catalog. The legend explains the name of the icons associated with the items as defined in Icon Maintenance.
showLineComment	Yes	No	This setting determines if a field displays so buyers can enter sales order line comments in the shopping cart. This may be more applicable to B2B than B2C.
showLinePromDate	Yes	No	This setting determines whether the promise date is shown for each order line item on the shopping cart and the Finish Order pages. The setting values are Yes or No.
showLineReqDate	No	No	This setting determines if a field displays next to each item in the shopping cart so the buyer can specify a request date. Values are: • No: Line item request dates are not entered. *showReqDate* is typically Yes in this case. • Yes: Line item request dates are entered. The *showReqDate* field is typically set to No. However, when both *showReqDate* and *showLineReqDate* are Yes, an Apply All button displays beside the header Request Date field. This lets users apply the header Request Date to all order lines. • Required: Same as Yes but input of the field is mandatory during order entry.

Table A.5 Order Processing Registry Fields (Page 12 of 16)

Key	Default	Over	Usage
showLineSerNum	No	No	This setting determines if a field for update of lot or serial numbers displays in the shopping cart and on the order summary page. Values are: No: Do not allow entry of lot/serial numbers and do not display them on the order summary. Yes: Allow entry of lot/serial numbers for each item and display the entered values on the order summary. Byline: Allow entry of lot/serial numbers only for an item when ShowSerial function returns a value of True. Then display the entered value on the order summary. To activate the Byline setting requires implementers to write custom code for the ShowSerial function to return the correct value. As installed, QAD CSS always sets this value to True. **Note:** The serial numbers entered when this field is Yes are not returned to QAD EA. Implementers must map this value if they want it to be part of the QAD EA order; typically it is mapped as a line comment.
showLookupSearch	Yes	No	For OE1, determines if the item search box displays at the top of the left pane during order entry (`op_itemlookup.html` page). showSearchIndex has the same effect for OE2.
showOProcStatus	Yes	No	For B2C order maintenance, determines if buyers can search orders by status, as well as criteria such as user ID and customer.
showOrderDetailInCheckOut	Yes	No	This setting determines if the order trailer information is calculated and displays on the order confirmation page. Trailer details include taxes and freight, providing an approximate cost of the total order.
showOrderDetailTotals	Yes	No	This field is used in conjunction with ShowOrderDetailInCheckOut to display the totals associated with the details.
showOrderEntryRight	True	No	This setting determines whether a separate right pane should display in the OE1 screens; the right pane always displays in OE2. To completely disable the display of the right pane in OE1 screens, both this field and showRightPane must be No.
showOrderSummary	No	No	This setting determines if an additional instruction screen should display during order submission when payment method is 2, purchase order. This field should normally be left set to No. Setting it to Yes requires a custom implementation to create a custom `orderinstructions.html` page to display.

Table A.5 Order Processing Registry Fields (Page 13 of 16)

Key	Default	Over	Usage
showPartialShipper	Yes	Yes	This setting determines if buyers can indicate acceptance of partial shipments. If Yes, a Partial Shipment check box is displayed during order confirmation. This feature applies to B2B environments more than B2C. When ShowPartialShipper is No, you cannot set the Partial Shipment field, and the Partial OK field value in the sales order defaults to the customer data in QAD EA.
showPriceinConfigurator	Yes	No	When a configured item is added to the shopping cart, a drill-down icon displays next to the item during checkout. Clicking the icon lets the buyer view the features and options. This field determines whether prices are included with the display of features and options.
showPromDate	Yes	No	This setting determines whether the promise date is shown in the order header on the shopping cart and on the Finish Order pages. When the promise date varies per line, the header promise date shows the latest promise date for all lines on the order. If you want shoppers to see different dates for each line, set *showLinePromDate* to Yes.
showReqDate	Yes	No	This setting determines whether an updateable Request Date field displays in the order header on the shopping cart and the Finish Order pages. The setting values are Yes or No. When this field is Yes and *showLineReqDate* is No, the header request date applies to each line on the order and cannot be changed. If you want shoppers to be able to change the date for each line, set *showLineReqDate* to Yes. When *showReqDate* and *showLineReqDate* are Yes, an Apply All button displays beside the header Request Date field. This lets users apply the header Request Date to all order lines.
showShipper	Yes	No	This setting determines if the shipping method can be selected during order confirmation. The effect of this field depends on how the shippingOptions field is set: • If multiple options are defined, a drop-down list displays so the buyer can select a method. • If only one method is defined, it is used by default. • If no shipping options are defined, this field has no effect.

Table A.5 Order Processing Registry Fields (Page 14 of 16)

Key	Default	Over	Usage
showSortBy	wpro_cust_item. item_number	No	This field controls how items are sorted in the product catalog for both OE1 and OE2. You can specify any value in the QAD CSS item table (wpro_cust_item) such as sort_name, cust_part, item_type. The default is item_number. More than one sort value can be specified using a list separated by carets (^).
showUOM	Yes	Yes	This setting determines if the default item unit of measure displays in the shopping cart.
skipViewCartOnAdd	Yes	No	This setting determines if the cart displays every time an item is added. No: The shopping cart displays each time an item is added. Yes: The shopper can choose to display the cart when they want to.
stockAvailBrowse	111111	No	Not currently implemented. This setting controls the display of quantities columns in Stock Availability Browse.
templateOrder	Yes	Yes	This setting determines if a link to template orders displays on OE1 and OE2 pages. If Yes, the Save Order Template button also displays in the shopping cart.
trailerAddress	No,Yes,Yes	No	This setting controls the display of sold-to, bill-to, and ship-to addresses in the order trailer page. Specify Yes or No for each address; when populated, there should be three comma-separated values in the following order: 1. Sold-to 2. Bill-to 3. Ship-to For a B2C and B2B environment, the two critical address are bill-to for account settlement and ship-to for logistics, taxes, and charges.
useCurrencyUnicode	Yes	No	When it is set to Yes, the system looks for a hexadecimal unicode associated with the item currency in Currency Unicode Maintenance. If one has been defined, it is displayed before the price amounts. If useCurrencyUnicode is No, nothing displays before the price. However, the system always displays the currency code after the price.
useERPOrderNumber	Yes	No	This setting determines the source of the next order number: No: QAD CSS supplies the next order number. Yes: The next order number is derived from Sales Order Control in QAD EA. The generation of the order number occurs before the order is submitted to QAD EA.

Table A.5 Order Processing Registry Fields (Page 15 of 16)

Key	Default	Over	Usage
useLangItems	Yes	No	This setting determines how the user's associated language affects the display of items in the catalog. Yes: Only items with the same language code as the user display. No: All items for the customer display regardless of the item language code. Specific language code: Only items with this code display regardless of the user's language code. Blank: Only items with a blank language code display. **Note:** This setting has no effect on the display of items in Customer Item Maintenance.
userCurrency		No	Use this field to override the currency associated with a user in User Maintenance. When a user logs in to QAD CSS, the system checks for a currency in this order: • First, a currency defined with the userCurrency setting • If blank, the value assigned to the CSS user • If blank, the value from the customer bill-to in QAD EA
userCustomerPartNo	Yes	No	Not currently implemented. This field determines how items are validated during heads-down order entry. In this type of ordering, items are validated only when the buyer clicks submit. If this field is Yes, the item must be associated with the customer.
useTemplateQty	No	No	When Yes, buyers can specify an item quantity before submitting a template. This quantity is used as a multiple for each line in the template. For example, you specify a quantity of 10 when selecting a template. The quantity of each line in the template order is multiplied by 10 and added to the shopping cart.
useUserID	LoginName	No	Use this field to determine the value that populates the Entered By field for sales orders in QAD EA: • LoginName: The ID of the user who is currently logged into QAD CSS updates the Entered By field, letting you trace the order to a specific user. • Blank: The value of QADUser (see page 212) updates the Entered By field. This is the user associated with the process that updates the sales order table.
vshowItemThumbImage	False	No	This setting determines the default value for the Show Item Image check box displayed in the product catalog for OE1 and OE2. Works in conjunction with vupdateItemThumbImage.

Table A.5 Order Processing Registry Fields (Page 16 of 16)

Key	Default	Over	Usage
vupdateItemThumbImage	Yes	No	This setting determines if a check box displays in the left pane of the product catalog for OE1 and 2 so buyers can specify if item images should display. Works in conjunction with vshowItemThumbImage.
scripts		Yes	Not currently implemented. Lets you override the location of the QAD CSS scripts specified in System Control Table Maintenance.

Table A.6 Directory Paths Registry Fields

Key	Default	Over	Usage
images		Yes	Lets you override the location of the QAD CSS image files specified in System Control Table Maintenance.
styles		Yes	Lets you override the location of the QAD CSS style sheets specified in System Control Table Maintenance.

Table A.7 System Registry Fields (Page 1 of 8)

Key	Default	Over	Usage
b2bURL	http://www.EnterYourB2 URLHere.com	No	Not currently implemented. This setting specifies the URL reference to the log-in page for the B2B site.
b2cOrderStatus	False	No	Not currently implemented. This setting defines the display for B2C order history status. This setting determines if shoppers can run the Order Status Report on the customer profile home page. Set this to Yes only if autoExtendNewCustomer is Yes. Otherwise, shoppers may expect to see information for orders that have not been submitted to QAD EA.
companyTimeZone	-0800 PST	Yes	The value of the company time zone is used during e-mail communication to report the time zone from which the e-mail originated.
compLogoHref	http://yourcompany logohref.com	Yes	This setting defines the URL that will be associated with the additional company logo located in the header. Works in conjunction with compLogoName, which defines the image.
compLogoName		Yes	This setting defines the full file name (with extension) of an additional image to display next to `host_logo.gif` in the header. The system always displays an image named `host_logo.gif` first.

Table A.7 System Registry Fields (Page 2 of 8)

Key	Default	Over	Usage
ConfiguratorWSURL	`http://`*`cfgWebSpeedServerHostName`*`/cgi-bin/wspd_cgi.ksh/WService=`*`cfgWebSpeedBrokerName`*	No	This setting provides the Configurator WebSpeed URL to enable QAD CSS for items defined with the QAD Configurator (an add-on product for QAD EA).
custDisplayLimit	25	Yes	This setting determines how users select a customer during login when more than one customer is associated with them in User Maintenance. • If the number of customer records associated with the user is less than the value you specify, a drop-down list appears. • If the number of customer records associated with the user is greater than the value you specify, a screen with lookups appears.
defaultCountry	USA	No	This setting defines the default country to use in address records. These must be valid country codes defined in QAD EA.
defaultCustomerRegistration	userreg	No	The default user for customers set up in User Registration. Values for this user are copied when a new account is set up based on information collected in the online registration form and verified through User Registration.
defaultSite		No	This setting determines the default site for the temporary customer ship-to record created by the system when creating quotes to determine a preliminary order summary in the B2C order process. This value is used only when the customer associated with the defaultCustomerProfile does not have an associated site. The site associated with a customer is always used first.
disableAccount	False	No	This setting determines what happens when the buyer fails to provide a valid user ID and password. When True, the user account is deactivated and e-mail event EX066 occurs. This field works in conjunction with failLoginRetry. When this field is Yes, a user can supply invalid log-in data three times before an account is disabled.
failLoginRetry	Yes	No	When Yes, the system checks disableAccount after three failed login attempts and disables the account if required.
exHeaderButtonIcon	Yes	No	This setting controls whether to display button icons in the header.

Table A.7 System Registry Fields (Page 3 of 8)

Key	Default	Over	Usage
exHeaderType	1	Yes	This setting determines the style of the QAD CSS header: • When exHeaderType is 1, the header has two parts, one for menu buttons and the other for items such as the company logo and release number. • When exHeaderType is 2, the header has three parts. The first two parts are similar to type 1. The additional header layer includes the date, a welcome message, cart summary, checkout button, and search option. • When exHeaderType is 3, the header is customizable. You can use the procedure insertNewGenHeader3 (lib_sys_superui1.p) to customize the header.
exHeaderCart	No	No	When exHeaderType is 2, this field controls the display of the shopping cart summary and cart icon in the header.
exHeaderDate	No	No	When exHeaderType is 2, this field controls the display of the system date information in the header.
exHeaderMenu	No	No	When exHeaderType is 2, this field controls the display of an additional Quick Menu bar in the header. If used, you must design the items that display on the Quick Menu.
exHeaderSearch	Top	No	When exHeaderType is 2, this field controls where the search object displays in the header. Valid entries are Top and Bottom.
exHeaderWelcome	No	No	When exHeaderType is 2, this field controls the display of message in the header welcoming the user by name, such as Welcome John Smith.
exmenuDefault		No	Not currently implemented.
genMenuHeight	20	No	Tells the index how high the JavaScript menu is. Height is not related to the number of rows, but more to the available menu area. The value should be set based on the resolution of the user's display device. A value less than 20 may result in improper menu display.
genMenuInLine	True	No	This setting controls how the menu is generated. Menus once finalized can be generated in a JavaScript file and stored. True: Generate the menus in real time each time the buyer accesses the home page. False: Use the generated JavaScript file. This should be set to False once the menus are finalized to improve runtime performance. Use the menuDir registry setting to define where the menu JavaScript file is located.
genMenuWidth	180	No	
HDOHeight	215	No	This setting determines the height of the heads-down order-entry frame set.

Table A.7 System Registry Fields (Page 4 of 8)

Key	Default	Over	Usage
HDOHeightNS	225	No	This setting determines the height of the heads-down order-entry frame set for Netscape.
hostCopyrightHref	http://www.qad.com	Yes	This setting defines the host copyright URL located in the footer. Change this to a value appropriate for your installation.
hostCopyrightText	<center>A Passion For Manufacturing © Copyright 1997-2005 QAD Inc. </center>	Yes	This setting defines the host copyright text located in the footer. Change this to a value appropriate for your installation.
hostURL	http://www.EnterYour HostURL.com	No	Not currently implemented. This setting defines the URL of the host's public Web site. Change this to a value appropriate for your installation.
httpsURL	https://www.EnterYour HTTPSURL.com	No	This setting determines the URL of the host when running in secure mode. The standard host URL is built by the system using information determined during installation in the WebSpeed startup files, and does not need to be defined with a registry setting. This setting is required only under the following conditions: • The entire application is not running under SSL protection. (When the entire application runs under SSL, two URLs are never need.) • Port numbers are included in the host URL, such as: http://host.MySite.com:1234.
indexOrder	SEARCH, MOTD, MESSAGE, STATUS	Yes	Can be set to any of the following or any combination of the following: SEARCH, MOTD, MESSAGE, STATUS. This setting controls the display of the login page for B2B environment. Based on the value of this field: • SEARCH displays a search box for searching through the product catalog. • MESSAGE displays a user-defined message. • STATUS displays all orders previously placed by the buyer and the order status. • MOTD displays a generic message of the day.

Table A.7 System Registry Fields (Page 5 of 8)

Key	Default	Over	Usage
indexOrderStatusHistory	30	No	This setting determines how many days of order history are displayed on the Order Status Report. The system looks for orders with an order-entry date up to this many days before today's date. Set this value based on the transaction volume of the company. **Note**: indexOrder controls what the user sees on the home page and indexOrderHome controls what the user sees on the Order Entry page. These fields determine if order history can be displayed.
itemDetailLink	Yes,Yes,Yes	No	This setting defines which elements related to items are presented as hyperlinks in the catalog to an additional item detail page. Item Layout Maintenance determines the fields displayed in the Product Catalog. Three fields related to the item can have associated hyperlinks that display a detail page: • Item image • Customer item number • Item number The values in itemDetailLink determine the default values for these three fields in Item Layout Maintenance.
itemLayout	111010000011111	Yes	This setting determines the default values for the display check boxes associated with the 15 fields in Item Layout Maintenance. 1 indicates selection of field as default; 0 indicates non-selection. Users can change these fields in Item Layout Maintenance if needed. The values specified in Item Layout Maintenance determine which item details display in the center pane of the product catalog for OE1 and OE2.
itemLayoutHeader	Description, Item, Additional Info, Available, Price/UM, Quantity	No	This setting defines default values for the Header Label fields in Item Layout Maintenance. These, in turn, determine what displays above the associated column in the product catalog for OE1 and OE2.
itemLayoutHeader-eng	Description, Item, Add'l Info, Avail, Price/UM, Add	No	This setting defines the column labels for the selected item details to be displayed in OE1 and OE2 for the English language.
itemLayoutLabel-eng	,,,,,,,,Def:,All:,,,qty:,,	No	This setting defines the side labels for each detail for an item in OE1 and OE2 for the English language.
itemLayoutLabel	,,,,,,,,,,,,,,qty:,,	No	This setting defines default values for the Side Label fields in Item Layout Maintenance. These, in turn, determine what displays to the left of the item detail in the product catalog for OE1 and OE2.

Table A.7 System Registry Fields (Page 6 of 8)

Key	Default	Over	Usage
itemLayoutName	Sort, Desc 1, Desc 2, Customer Number, Part Number, Other 1, Other 2, Other 3, Other 4, Available (Default), Available (All), Price, UoM, Quantity	No	This setting is not currently used. It has been replaced by the language specific registry settings. This setting defines the default descriptions for the elements displayed on Item Layout Maintenance.
jsmsgDir	/qadcss/scripts	No	Specify the full path to the directory where generated error message files are located. `QADCSSInstallDir/scripts` is recommended. To support multiple languages, QAD CSS places generated error message files in language- specific subdirectories under the directory specified. Messages are read from a generated JavaScript file at runtime.
launchpointHeight	85	Yes	Not currently implemented. This setting determines the height of the frame set that displays when QAD CSS is opened from a link in another page.
lmenustartMenuX	2	Yes	This setting defines the number of pixels for the menu's horizontal position when genMenuInline is True. If not set, a default value of 7 is used. This accommodates both header types.
lmenustartMenuY	140	Yes	When genMenuInline is True, defines the number of pixels for the menu's vertical position. If not defined, the default is 112. If exHeaderType is 1, the default value of 112 is adequate. When exHeaderType is 2, a higher value such as 240 is better
lpMenuWidth	180	No	This setting defines the menu's width. If not defined, the default is 222.
menuBackGround	#003466	Yes	Sets the background color for the index menu. If not defined, the default is #596D99.
menuBackGroundOver	#000066	Yes	Sets the background color for the highlight bar or the cursor, when the focus is placed on the menu. If not defined, the default is #363ACC.
menuDir	/qad/mfgpro/92/css test/qadcss/scripts	No	When genMenuInline is False, defines the directory location where the menu JavaScript file is stored after generating. Menus are generated in Menu System Maintenance to support multiple languages and improve runtime performance.
menuHeaderBottom		No	This setting defines an additional image to display below the main company logo (always host_logo.gif) in the header.

Table A.7 System Registry Fields (Page 7 of 8)

Key	Default	Over	Usage
menuHeaderClass		Yes	This setting defines the style class for the menu header. The default value is the default body class.
menuHeaderSpace	No	No	This setting determines if extra space is needed in the header to accommodate the display of the company logo. If the host_logo.gif cannot be compressed to fit within the upper-left corner, this lets you insert an additional space between the graphic and the menu buttons.
menuWindowOptions	width=700, height=700, scrollbars=1, toolbars=1, statusbar=1	No	Not currently implemented. Determine the properties of the window that opens when QAD CSS is opened from another Web page.
minPasswordLength	6	Yes	This setting defines the minimum password length.
partslookuplogo	parts_look.gif	Yes	This setting determines the name of the image file displayed on OE1 before the execution of search.
registrationURL	http://license.qad.com/ scripts/lic.wsc/cl/ cl_checkreg.html	No	The URL of the QAD CSS license server used to obtain a clearance code. **Note**: Both the key value and usage fields must be set correctly. For usage, specify the following URL: http://license.qad.com/scripts/wsisa.dll/WService=live/cl/cl_checkreg.html
reportFooterLogo	host_logo.gif	No	Not currently implemented. This setting specifies the name of the image file displayed at the bottom of reports. If left blank, the `host_logo.gif` is used; this image is always used on the header.
runSecurePages	Yes	No	Not currently implemented. Makes pages in the application that use the makeSecure function run under https (SSL). This is required for credit card implementation.
showAddLoginInfo	No	No	Tells the menu bar if additional login information should be shown.
showRightPane	Yes	Yes	This setting determines if the right pane displays throughout the system. The OE2 option always displays the right pane, regardless of the value set in this field.
ShowSTDEXTConfTabs	Yes	No	This setting determines whether the Standard Configurations and Existing Configurations tabs are displayed in the configuration questionnaire. No: Standard Configurations and Existing Configurations tabs are not displayed in the configuration questionnaire. Yes: Standard Configurations and Existing Configurations tabs are displayed in the configuration questionnaire.

Table A.7 System Registry Fields (Page 8 of 8)

Key	Default	Over	Usage
stylesheet	`qad_style.css`	No	This setting sets the style sheet file for all pages.
userMessageArchive	True	No	This setting determines if user messages are archived or deleted from the main index page. No: Messages are physically removed when the index page redisplays. Yes: Messages are marked for deletion but not physically removed.

Product Information Resources

QAD offers a number of online resources to help you get more information about using QAD products.

QAD Forums (community.qad.com)
Ask questions and share information with other members of the user community, including QAD experts.

QAD Knowledgebase (knowledgebase.qad.com)*
Search for answers, tips, or solutions related to any QAD product or topic.

QAD Document Library (documentlibrary.qad.com)
Get browser-based access to user guides, release notes, training guides, and so on; use powerful search features to find the document you want, then read online, or download and print PDF.

QAD Learning Center (learning.qad.com)*
Visit QAD's one-stop destination for all courses and training materials.

*Log-in required