Infor Configure Price Quote Sales Portal Administration Guide

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Contents

About this guide

This guide provides information for understanding and using the Infor CPQ Sales Portal Admin System.

Intended audience

The intended audience for this guide is administrators who are responsible for maintaining their organization's Sales Portal environment.

Organization

This table describes the sections of this guide:

Section	Description
Getting started with the Sales Portal Admin System	Introduction to terms and concepts that are related to the Sales Portal Admin System
Activating Sales Portal	The activation of the Sales Portal Admin System and client applications
Working with dealers and representatives	The creation and maintenance of dealers and representatives
Working with product maintenance	The creation and maintenance of products and price lists
Working with system resources	The creation and maintenance of system resources for language translations
Working with preferences and application settings	Application settings and preferences
Working with system messages	System messages

Contacting Infor

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Getting started with the Sales Portal Admin System

1

The Sales Portal Admin System is a web-based application used for Sales Portal administrative setup and maintenance. Through the Admin System, administrators can customize Sales Portal preferences and application settings. They can also access and manage system licensing and personnel accounts, such as dealers, representatives, and on-behalf-of users.

For Optimal Performance, Sales Portal is supported with:

- Internet Explorer 11
- Windows 10
- Windows Server 2016

Understanding the Admin System workflow

This workflow is the basic progression with the Sales Portal Admin System:

1. Activate the Admin System.
2. Complete online activation registration.
3. Activate the Sales Portal client.
4. Create a dealer.
5. Create representatives for the dealer.
6. Create system messages.
7. Set preference settings and application settings.

Starting the Admin System

1. Select **Start > CPQ > CPQ Sales Portal 8.1 > CPQ Sales Portal Admin 8.1**.

2. If this is a new session, then you are prompted to enter your log in information in the Windows Security dialog box. Specify your Windows Authentication information.
3. Click **Ok**.

Activating Sales Portal

2

When activating Sales Portal for the first time, users must activate both the Admin System and Sales Portal client applications. After the Admin System has been activated, you must activate the Sales Portal client application. Then, use the registration settings to specify manufacturer and on-behalf-of user information and to view the system's license usage.

Activating the Sales Portal Admin System

1. Select **Start > CPQ > CPQ Sales Portal 8.1 > CPQ Sales Portal Admin 8.1**.
2. Log in to the application. Sales Portal Admin uses Windows Authentication and requires the user name and password of a user with server administrator credentials.
3. Specify your license key.
4. Click **Activate** .

Activating the Sales Portal client application

1. Select **Registration > Online Application Registration**.
2. Copy the authorization code with **Ctrl-C**. This authorization code will be used to activate your Sales Portal client application.
3. Select **Start > CPQ > CPQ Sales Portal 8.1 > CPQ Sales Portal 8.1**.
4. Paste the authorization code in the text box with **Ctrl-V**.
5. Click **Activate**.

Creating a manufacturer user and on-behalf-of user

1. Select **Registration > Registration Settings**.

2 Specify this information:

Company Name
Specify a name for the manufacturer.

User ID

Specify the user ID that you, the manufacturer, will use to access Sales Portal on behalf of a dealer. After saving, the user ID is read-only. Edit the user ID in the Sales Portal client application's My Profile dialog box.

Profile Name

Specify a configuration profile or the default profile. You can set up configuration profiles to set certain preferences, such as a language or views, for a particular group of users.

Mobile Profile Name

Specify the Profile Name for your mobile device. Sales Portal will automatically detect mobile browsers and load your mobile configuration profile. There must be a valid profile in this text box. If you have not set up a mobile configuration profile, then use your default configuration profile name.

Admin password/Verify password

Specify a password for your on-behalf-of user account. Once saved, the password is read-only. Edit the password in the Sales Portal client application's My Profile dialog box.

Licences Allocated

Specify the number of licenses that are allocated to create on-behalf-of (manufacturer) users. To create additional on-behalf-of users, log in to Sales Portal as the manufacturer and add representatives in the My Company Profile dialog box.

Language

Specify the language that displays to the user. The list displays all enabled languages in the Sales Portal database. Enable additional languages in the Sales Portal database's Locales table.

3 Review this information:

Licenses Used
The current number of on-behalf-of users that are created in the system.

Total users available
The total number of user licenses that are purchased by the company.

Total users remaining

The number of unallocated user licenses remaining for the system. Each representative you create counts as a user and consumes a license.

Working with dealers and representatives 3

To create and manage dealers and representatives, you must perform these processes.

Understanding dealers and representatives

Dealers are a role in Sales Portal for creating quotes and orders for customers. Dealers have access to Sales Portal user functionality only. The dealers section in Sales Portal enables the manufacturer to create and maintain dealers and representatives, and to create and maintain location and order placement data for the dealer.

Use the **Locations** tab to maintain the list of addresses associated with the dealer.

Use the **Order Placement Defaults** tab to maintain manufacturer-to-dealer pricing terms, business terms, and shipping terms. These values are the defaults for all of the dealer's quotes and orders. If you have multiple price lists, then ensure that you assigned the correct price list to the dealer. Assigning the correct price list is important because the dealer sees the prices from the price list that is assigned to them.

Use the **Representatives** tab to maintain a list of the dealer's representatives. You can add as many representatives as you have licenses.

When you are registering a new dealer, the first representative you create is the dealer’s admin representative. The admin representative has the ability to create all other representatives for the dealer. When a representative's status is set to **Inactive**, their license becomes available and you can use it on another representative.

Creating a dealer

Before creating a dealer, register the Admin System and complete the online application registration.

1 Select **Dealers > New**.

2 Specify the dealer and contact information.

3 Specify this general information:

Dealer ERPID

Specify your ERP system's record ID for the Dealer entity. If Processing Master Data via ION, this would refer to the Customer ID passed in the CustomerPartyMaster BOD.

Bill-to ERPID

Specify your ERP system's record ID for the Bill To Address entity.

Enable Location Security

Select this check box to enable location security for the dealer. Location security enables administrators to affiliate representatives to specific dealer locations. This option can only be modified if there are no representatives or locations associated with the dealer.

Direct Sales Model

Select this check box to enable direct sales for the dealer. This option can only be modified if there are no representatives or locations associated with the dealer.

4. Optionally, select the **Locations** tab and specify additional locations for the dealer.
5. Select the **Order Placement Defaults** tab and specify a price list. Price lists contains the products and prices that display when the dealer creates a quote.
6. Specify the terms to use when the dealer places an order. If you have multiple price lists, then ensure that you assigned the correct price list to the dealer.

Creating a representative

1. Select **Dealers > Representatives** tab.
2. Click **Create**.
3. Specify the representative information.
4. Specify this application settings information:

Profile Name

Specify the Profile Name. Configuration profiles associate languages and views to specific groups of users through Design Studio. If you are not associated with a configuration profile, then use the default profile.

Mobile Profile Name

Specify the Mobile Profile Name. Sales Portal will automatically detect mobile browsers and load your mobile configuration profile. There must be a valid profile in this text box. If you have not set up a mobile configuration profile, then use your default configuration profile name.

Language

Specify the language. This field shows the language that displays to the user in Sales Portal. The list displays all enabled languages in the Sales Portal database. Enable additional languages from the Locales section of system resources.

Order Privilege
This option lists the ordering capabilities for the representative. Specify one of these options:

None: You have no order privileges. The order section will not show in the navigation bar.

Can Convert Quotes to Orders: You can place orders through quotes and print them from the orders search grid. You cannot create new orders or edit existing orders.

Can Order Directly: You have full order privileges. You can place orders, create new orders, and edit existing orders.

Default Landing Page
Specify the Default Landing Page. This option specifies which landing page you are directed to after you log in to Sales Portal.

Manage Dealer
Select this check box to act as a dealer administrator (admin). Admins can modify representative settings on the Sales Portal My Company Profile section. Admins can also manage Dealer locations and can modify the Enabled in All Locations setting for a customer.

5 Specify this online licensing information:

User ID/Password

Specify a unique user name and password for the representative to use to log in to the Sales Portal client application.

Windows User ID

Specify the representative's Windows User ID.

Is Administrator

Specify the dealer representative. The first representative you create for the dealer will be the administrator representative.

Authorized Licenses
Specify the number of licenses, not exceeding your company's total licenses, to give to the dealer. This will be the number of representatives you can create for the dealer.

6 Select the **Active** check box to use the representative in the system. Active representatives use a license.

Working with product maintenance

4

Product maintenance is used to manage products and product pricing through Sales Portal.

Understanding product maintenance

Use product maintenance to maintain products for your system's manufacturers. The product maintenance settings determine which products and prices display when you create quotes and orders in Sales Portal. Review these definitions before you continue:

Manufacturers
Your manufacturer contains a complete list of manufactured products and product pricing information. Most implementations will only have one manufacturer because only one can be active at a time.

Products
Each product is associated with a manufacturer and a price list. A product can be associated to multiple price lists and manufacturers. Products can be disabled but not deleted. Use product list prices to add or update existing products to price lists and adjust their price information.

Price Lists
Price lists contain a group of products and their prices. When you create a dealer, you select a price list for that dealer. When the dealer's representative logs in to Sales Portal and creates a quote, the products and prices from the selected price list display.

Product List Prices
Use product list prices to manage product pricing information.

An example using manufacturers, products, price lists, and product price lists would be a window and door manufacturer that has multiple window and door products. They create a price list that contains their door products and prices and another price list that contains their window products and prices. They can then assign the door price list to their door dealers and the window price list to their windows dealers. When those dealers sign in to Sales Portal and create a quote, the Item option list displays the products and prices in their selected price list.

Adding a manufacturer

1 Select **Product Maintenance > Manufacturers > Create**.
2 Specify this information:

Name
Specify a name.

Caption
Specify a caption.

Description
Specify a description.

Namespace
Specify a namespace.

Set as Active Manufacturer
Set a manufacturer to Active or Inactive.

Adding a price list

By default, each product you create will be included in the BASE price list. This list cannot be deleted.

1 Select **Product Maintenance > Price Lists > Create**.
2 Specify this information:

Name
Specify a name.

Description
Specify a description.

Type
Specify a type.

Adding a product

1 Select **Product Maintenance > Products > Create**.
2 Specify this information:

Part Number
Specify the official part name for the product.

Name
Specify an alternate name for the product that is used in Sales Portal.

UOM
Specify the unit of measure.

Sort Order
Specify the order in which products display when the user navigates the Visual Product Catalog. For example, if 10 products are each assigned a single number ranging from 1-10, the product assigned sort order 1 will display first and the product assigned sort order 10 will display last. If the sort orders are the same, items will display based on their translated product name.

Image Link
Specify the file name of an image located in your CPQ instance's `ConfiguratorContent/Images` folder.

Manufacturer
Specify a manufacturer for the product.

Effective Date
Specify the dates in which the product is available to use in the system.

Enabled
Specify the check box to display the product in the client application.

Caption
Specify the resource created for the product. The product name displayed in Sales Portal is based on the resource value and language setting of the user.

Configurable
Select this check box if the product is configurable.

Configure on Qty Change
Select this check box if you want the item to reconfigure when the quantity is changed.

Namespace
Specify the namespace that contains the item's ruleset.

Ruleset
Specify the ruleset to configure when the item is added to a quote or order.

Constraint Model
Optionally, specify the constraint model that is associated with the item. Use constraint models to set up the item's configuration options on the quote page.

Constraint Resource
Specify a constraint resource.

Adding a product list price

1. Select **Product Maintenance > Product List Prices > Create**.
2. Specify this information:

   Price List
   Specify a price list.

Part Number
Specify a part number.

Effective/Expire Date
Specify an effective/expire date.

Price
Specify a price.

Cost
Specify a cost.

Adding labor tax

Labor tax enables users to separate standard tax from tax on labor items and to give different tax rates.

1. In Sales Portal Administration, navigate to **Product Maintenance** > **Products**.
2. Click the **Part Number** name to open the required assembly item
3. In the Products section, select the Is Labor Item check box.

Adding supported attached file types

- A valid value for this field is a list of 0 to n file extensions delimited by the vertical bar character: |
  - Examples
    - png: Only allow PNG image files
    - txt: Only allow plain text files
    - png|txt: Only allow PNG image files and plain text files
- The extension values do not require a period to start
  - "png" vs. ".png"
- No value means that no file types are available to upload as attachments
- Files without extensions can be allowed by starting the value with the delimiter
  - Examples
    - |: Only allow files without an extension
    - |png: Only allow files without an extension and PNG image files
  - A trailing delimiter on the value will be ignored
    - png|: Only allow PNG image files
    - |png|: Only allow files without an extension and PNG image files

  - An empty string between two delimiters will be ignored
    - png||txt: Only allow PNG image files and plain text files
    - ||: Only allow files without an extension
    - |png||: Only allow files without an extension and PNG image files
    - png||: Only allow PNG image files

- When changing other preferences from the Administration site, changes will not take effect until the user logs out and back in or IIS is reset
- Because web browsers only provide the file selection dialog type filter as a hint instead of validation, users can change the filter to All Files and select an invalid file. In this case an error message will be shown when the user attempts to save the attachment.

1 In Sales Portal Administration, navigate to **Preferences** > **Application**.
2 In the Application section, specify the allowed file types.

Enabling a proofing report

1 In Sales Portal Administration, select **Preferences** > **Application**.
2 In the Proofing Report section, set the **Enable Proofing Report** field to True.

Adding a category

1 Access categories from the Magnifying Glass icon next to the **Item** option list in a quote or order.
2 Select **Product Maintenance > Categories**.
3 Click a category.
4 Click **Create** to add a new category under that category.
5 Specify this information:

   Category Name
   Specify a category name.

   Category Caption
   Specify a category caption.

   Parent Category
   Specify a parent category.

6 Click **Product Selection**.
7 Select the Selected check box to add the product to the category.

Adding an image to a category

1. Add all required images for categories to this location: `C:\inetpub\wwwroot\CPQ\Sales Portal\Client\CategoryImages`.
2. Log in to Sales Portal Administration.
3. Select **Product Maintenance** > **Categories**.
4. Select your required category.
5. In the **Image** field, specify the file name and extension for the image to be displayed for the selected category.
   - Example: CoinSideCar.jpg
   - Example: CoinSideCar.png

Adding an image to a product

1. Add all required images for categories to this location: `C:\inetpub\wwwroot\CPQ\Sales Portal\Client\ProductImages`.
2. Log in to Sales Portal Administration.
3. Select **Product Maintenance** > **Products**.
4. Select your required product.
5. In the **Image** field, specify the file name and extension for the image to be displayed for the selected product.
   - Example: CoinSideCar.jpg
   - Example: CoinSideCar.png

Enabling visual product catalog

Before you begin using the Visual Catalog or advanced filter features, select **Preferences** > **Quote/Order Maintenance** > **Advanced Filtering** and click the **Refresh Data** button. After the data is refreshed, perform an F5 refresh to your Sales Portal screen.

1. In Sales Portal Administration, navigate to **Preferences** > **Quote/Order Management**.
2. In the Catalog section, set the **Visual Catalog** field to Yes.

Setting up a Resource ID

1. In Sales Portal Administration, select **System Resources** > **Resources**.
2. Click the **Create** icon.
3. Specify this information:

ID:
Specify an ID.

Description:
Specify a description.

Category:
Specify a category.

Resource Type:
Specify a resource type.

Default Value:
Specify a default value.

4 Click **Open Resource Values**.
5 Select this resource from the list.
6 Specify the translated text for each language option in the **Value** fields.

Setting up a resource value

1 In Sales Portal Administration, specify **System Resources** > **Resource Value**.
2 Click the **Create** icon.
3 Specify this information:

ID:
Specify an ID.

Description:
Specify a description.

Category:
Specify a category.

Resource ID:
Specify a resource ID.

Default Value:
Specify a default value.

4 Click **Open Resource Values**.
5 Select this resource value from the list.
6 Specify the translated text for each language option in the **Value** fields.

Internationalization of facets in the Visual Product Catalog

This internationalization of facets enables you to set up internationalized resources for catalog items, categories, and attributes. Complete set up of these resources to display translations on the catalog and facets based on the associated language in Sales Portal.

Associating a language to a dealer

1 In Sales Portal Administration, select **Dealer** > **Search**.
2 Select your required dealer from the list.
3 In the **Representative** tab, select the name of your required dealer representative from the list.
4 In the **Language** field, select your required language from the menu.

Associating an Internationalized Resource ID with a product/dealer

1 In Sales Portal Administration, select **System Resources** > **Resources**.
2 Select your required resource from the list.
3 Click **Open Resource Values**.
4 Select the check box associated with the required language.
5 Specify the translated text that will display for your dealer in the **Value** field.

Specifying item sort order when navigating categories

Items in the admin system can be associated to a sort order, using the **Sort Order** field located at **Product Maintenance** > **Products**. This feature enables the manufacturer to control which products are featured the highest and lowest when navigating the Visual Product Catalog. For example, if 10 products are each assigned a single number ranging from 1-10, the product assigned sort order 1 will display first and the product assigned sort order 10 will display last. When you use Search Product or Facets with Advanced Search to filter, items show based on their item score above their item sort order number. If the sort orders are the same, items show based on their translated product name.

Enabling advanced filtering

Before you begin using the Visual Catalog or advanced filter features, navigate to **Preferences** > **Quote/Order Maintenance** > **Advanced Filtering** and click the **Refresh Data** button. After the data is refreshed, perform an F5 refresh to your Sales Portal screen.

1 In Sales Portal Administration, select **Preferences** > **Quote/Order Maintenance** > **Advanced Filtering**.
2 Set the Advanced Filter option to Yes to enable Advanced Filtering in Sales Portal.

Adding additional facet options

1 In Sales Portal Administration, select **Product Maintenance** > **Product Filter Attributes**.
2 Create or edit facet options in the available list.

Adding additional facets to a product

1 In Sales Portal Administration, select **Product Maintenance** > **Products**.
2 Select the required product from the list.
3 select the **Product Filter Attribute Values** tab.
4 Click the **Add** button.
5 Select the required existing Product Attribute from the menu.
6 Set the required **Value** field.

Enabling sublines

To add the CreateSalesPortalSubLine Integration Rule template to the Model database that is linked to Sales Portal:

1 In Sales Portal Administration, select **Preferences** > **Quote/Order Maintenance**.
2 In the Sublines section, next to the Integration Template, click **Install**.
The Last Install Date shows the last time that the Integration Template was installed in this model database.

Sublines

Sublines are generated from a parent configured item in Sales Portal through the use of integration rules that use the CreateSalesPortalSubLine template. The CreateSalesPortalSubLine template can be found in the Model Database under Manage Templates.

Enabling multi-currency

1 In Sales Portal Administration, select **Preferences** > **Pricing** > **Multi-Currency**.
2 Set the **Multi-Currency** field to Yes.

Setting up Quote Expiration

- If the Configurator output is v1, use the purge orders or quote 8.1v1.sql script.
- If the Configurator output is v2, use the purge orders or quote 8.1v2.sql script.
- Ensure that all databases have been backed up prior to executing these scripts. If the incorrect script is selected, all configuration data will not be purged.

The Output Database and the Sales Portal Database must be hosted on the same SQL server to clean up the configuration data that is ties to quotes/orders that are being purged.

1 After selecting the appropriate script, update these parameters that are located at the top of the SQL script:

- @orderTypeId NVARCHAR(30) = '2'
    - Enter '1' to purge orders.
    - Enter '2' to purge quotes.
- @onlyPurgeDeleted BIT = 1
    - Enter 1 to purge orders/quotes that are marked as deleted.
    - Enter 0 to purge all orders/quotes that fall within the purge period setting that is set in the admin system.

    Note: The default purge period setting in the Admin system is 0. This means that all orders/quotes will be deleted with the @onlyPurgeDeleted parameter is set to 0 regardless of the order/quote status.
- @salesPortalDatabase NVARCHAR(200) = 'SalesPortal81'
    - The name of the Sales Portal database that contains orders/quotes to purge.
- @ConfiguratorOutputDatabase NVARCHAR(200) = 'Output81v1'
    - The name of the configuration output database that contains the configuration data of the orders/quotes.

2 Create a SQL job to execute the appropriate script with modified parameters on a set schedule.

Working with system resources

5

System resources enable you to manage language translations and currencies through Sales Portal.

Understanding system resources

Use system resources to manage currencies and language translations for Sales Portal international users. Review these definitions:

Countries
Countries are added or enabled for existing countries in the database. Enabled countries show as options in all Sales Portal Country option lists.

Territories
A territory is a state or province associated with a country. Enabled territories display as options in all Sales Portal State option lists.

Currencies
Currencies are added or enabled for existing currencies in the database. Select your base currency from the application preferences section in Sales Portal Admin.

Locales
Each language in the database is associated with a locale. Enabled locales show as languages in the representative's Language option list.

Resources
Resources control the text that is displayed in Sales Portal. For example, the ENT_PROJECTS resource controls what text is shown for the Projects section in the navigation bar.

Resource values
Use resource values to customize resources in Sales Portal for each enabled language. For example, a Spanish user can modify the ENT_PROJECTS resource value for the Spanish locale to show as Proyectos.

Adding a country

1 Select **System Resources > Countries > Create**.
2 Specify this information:

Name
Specify a name.

Code
Specify a code.

Caption
Specify a caption.

Has Territories
Specify if a country has territories.

Enabled
Select to enable or disable.

Adding a territory

1 Select **System Resources > Countries**.
2 Select a country.
3 Select the Has Territories check box.
4 Click **Create**.
5 Specify this information:

Name
Specify the name.

Code
Specify the code.

Caption
Specify a caption.

Adding a currency

1 Select **System Resources > Currencies > Create**.
2 Specify this information:

Name
Specify the name.

Code
Specify the code.

Enabled
Select to enable or disable.

Adding a resource

1 Select **System Resources > Resources > Create**.
2 Specify this information:

ID
Specify an ID.

Description
Specify a description.

Category
Specify a category.

Resource Type
Specify a resource type.

Default Value
Specify a default value.

Editing resource values

1 Select **System Resources > Reources**.
2 Select the check box next to a record.
3 Click **Open Resource Values**.
4 Specify values in the Value text boxes for each enabled locale. These values display in the Sales Portal UI.
5 Specify this information:

Name
Specify a name.

Code
Specify a code.

Caption
Specify a caption.

Has Territories
Specify if the resource value has territories.

Enabled
Select to enable or disable.

Working with preferences and application settings

6

Sales Portal preferences and application settings are available for Admin System administrators.

Use the Preferences dialog box, available to users with administrative Manage Dealer privileges, to personalize the Channel Sales application. The preferences you set are the defaults used in the application.

Changing preferences

1 Select the **Settings > Preferences**.
2 Select a category tab.
3 Update your preferences. These tables show the available preference options in the Admin System:
   This table shows the available Application preferences options in the Admin System:

Name	Description
Base Currency	Sets the system's base currency.
Default Landing Page	The landing page to display by default.
Default Theme Name	The name of the default theme to use.
Discount Lock	Locks discounts.
Discount Mode	Sets how the discount is calculated.
Display Mode	Sets the default display for discounts and markups on the **Pricing** tab and print view.
Email (Customer Service)	Customer Support Representative email.
Email (Techinical Support)	Technical Support Representative email.
Enable On-behalf of mode	Select the CSR can switch between the customer's configuration view and the internal CSR view for a quote or order.

Name	Description
Initial Display	Determines the initial price for configured items before they are configured.
Max. % Rate	Maximum percentage rate that will be allowed in this application.
Multi-Currency	Enables or disables multi-currency.
Number of characters in comments	Determines whether a user can specify more than 500 characters in a comments field.
Ordering Level	Controls the default level of ordering functionality for representatives.
Reports Drop-down format	Defines the format to be used in the reports selection drop-downs.
Report Functionality Enabled	Enables report functionality.
Search Result Max Row Count	Determines the maximum number of rows to be returned by a search.
Show Add Discount	Displays the discount to your customer on the **Pricing** tab and print view.
Show Cost	Displays the cost on the **Pricing** tab and print view.
Show Discount	Displays your discount from the manufacturer on the **Pricing** tab and print view.
Show List	Displays the list price on the **Pricing** tab and print view.
Show Selling	Displays the selling price on the **Pricing** tab and print view.
Show Subtotal	Displays the subtotal on the **Pricing** tab and print view.
Show Upcharge	Displays the upcharge on the **Pricing** tab and print view.
Upcharge Mode	Selects how the upcharge is calculated and displays the cost on the **Pricing** tab and print view.
Visibility of Projects & Jobs	Visibility of projects and jobs.

This table shows the available Contact preferences options in the Admin System:

Name	Description
Mobile Profile Name	Default mobile profile name
Profile Name	Default profile name

This table shows the available Customer dialog preferences options in the Admin System:

Name	Description
Country	The default country to display when specifying an address.
Default List Price Code	The initial price list to display when specifying customer information.

This table shows the available My items preferences options in the Admin System:

Name	Description
Expiration (Days)	Used to determine the default expiration date for my items.

This table shows the available Order preferences options in the Admin System:

Name	Description
Price Adjustments	Enables or disables the **Price Adjustments** button on the quote page.

This table shows the available Quote/order maintenance preferences options in the Admin System:

Name	Description
Configurable Items	Determines if configurable item selection is supported in the application.
Default Tab	The default tab to display when creating new quotes or orders.
Line Comments	Determines if the line comments are visible in the shopping cart.
Line Price Details	Determines if the line price details are visible in the shopping cart.
My Items	Determines if my item selection is available in the application.
Non-Config. Items	Determines if non-configurable item selection is supported in the application.
Options Format	The format to use for summary details.
Price Details Format	The format to use for price details.
Expiration (Days)	The number of calendar days in which the quote will expire from its creation date.
Validate	Set configured lines to validate if the bill-to or ship-to address is changed.
Write In Items	Enable or disable write in items.

This table shows the available Purge period preferences options in the Admin System:

Name	Description
Service URL	The URL of the configuration service to be used for purge configurations.
Application Name	The name of the application to use for purge configurations.
Instance Name	The name of the instance to use for purge configurations.
Order Purge Period	Orders older than the specified value, in days, will be purged from the database.
Quote Purge Period	Quotes older than the specified value, in days, will be purged from the database.

This table shows the available Quote/order print preview preferences options in the Admin System:

Name	Description
Display (Pricing)	The values shown in the price/cost column.
Display (Images)	Default display mode for images.
File Extension	The image file extension that will be used to display images.
Line Header	Show or hide the header for the line items.
Logo	The relative path to the logo that is used on the PDF bids.
Options View	The level of detail that is displayed for configuration options.
Options Style	The style used to display configuration options.
Tabular Style Margin	The margin, in pixels, between configuration options and values when rendered in the tabular style.
Option Separator	The character that will be used to separate option value pairs in the paragraph style.
Acceptance Sign-off	Default for the acceptance sign-off block.
Expiration Date	Default for the quote expiration date.
Freight Terms	Default freight terms.
Job Comments	Default for the job comments.
Order Comments	Default for the quote/order comments.
Payment Terms	Default payment terms.

Name	Description
Project Comments	Default for project comments.
Quote Name	Default for the quote name.
Tax, S&H, Other	Show or hide taxes, shipping and handling and other charges.
Watermark	Shows a background watermark image.
Size	The default size of the line item images.

Enabling Document Automation on a quote or order in read-only mode

Use this procedure for customized custom actions.

1 In Sales Portal Admin, select **Application Settings** > **Custom Actions**.
2 Open the FlexDocs custom action for a quote.
3 Under Custom Action Preferences, select the Execute Read-Only check box.

Maintaining custom actions

Complete this task to specify and maintain custom actions for an event or user defined custom action.

Note: Some fields in the Custom Action Preferences section will be read-only based on the type of custom action.

1 In Sales Portal Administration, select **Application Settings** > **Custom Actions**.
2 Select your required system or user defined custom action from the grid.
3 Specify this information:

Name
Specify the name of the event or custom action that has a unique location.

Title Resource ID
Ties to a resource and resource value in the Admin system and shows when a launch preference of full overlay is specified.

Location
Specify the location where the custom action is placed.

Call Ruleset
Specify a ruleset to a custom action that is associated to the quote or order at the header level. This check box may be read-only based on your selection in the **Location** field.

Refresh on Finish
Set to True if your custom action modifies a field, for example, on a quote.

Sequence
The sequence shown in the Toolbar or More menu for the custom action.

Icon
Specify an image to add for an icon.

Launch Preference

- New Page: Creates a new tab or window that is based on your browser settings.
- No User Interface: Runs a custom action in the background.
- Full Overlay: A full overlay that is similar to the Configuration Window in Sales Portal.

Processor Type
The fully qualified class name for a custom action. This field is case-sensitive.

Processor Sub-Path
The subdirectory path under the Sales Portal custom actions folder where any non-compiled binaries reside. For example, markup files such as .aspx files. This field is only relevant for UI custom actions.

Running a ruleset from a custom action

You can run a ruleset from a custom action to gather information for reporting on a quote or order, validate inconsistencies across lines, apply discounts to lines, provide error or validation messages to lines, and actively evaluate downstream processes.

Before Processor Info
Specify a launch preference. The Processor type is the fully qualified class name for the custom action. This class name will run before a ruleset is called. This field is case-sensitive. A processor sub-path may be defined for UI custom actions.

Ruleset Info
Specify the Ruleset Info. The application, namespace, and ruleset should be a valid configurator combination. The output of the application should match the output of the application in which Sales Portal is pointing.

After Processor Info
Specify a launch preference. The Processor type is the fully qualified class name for the custom action. This class name will run before a ruleset is called. This is case-sensitive. A processor sub-path may be defined for UI custom actions.

1. In Sales Portal Administration, select **Application Settings** > **Custom Actions**.
2. Select your required custom action.

3 Specify this information:

Name
Specify the name of the event or custom action, unique in regards to location.

Title Resource ID
Specify the Title Resource ID. The title resource ID ties a resource and resource value in the Admin system and shows when a launch preference of full overlay is specified.

Location
Specify the location where the custom action is placed.

Call Ruleset Check box
When selected, adds a ruleset to a custom action that is associated to the quote or order at the header level. This check box may be read-only, based on your selection in the Location field.

Refresh on Finish Check box
Set to True if your custom action modifies a field, for example, on a quote.

Sequence
Specify the sequence that the custom action displays in the Toolbar or More menu.

Icon
Specify a static image icon of 16 X 16 pixels.

Title Resource ID
This options is only available if the **Launch Preference** field in the Ruleset Info section is set to Full Overlay.

Launch Preference

- New Page: Creates a new tab or window that is based on your browser settings.
- No User Interface: Runs a custom action in the background.
- Full Overlay: A full overlay that is similar to the Configuration Window in Sales Portal.

Processor Type
The fully qualified class name for a custom action. This field is case-sensitive.

Processor Sub-Path
The subdirectory path under the Sales Portal custom actions folder where any non-compiled binaries reside. For example, markup files such as .aspx files. This field is only relevant for UI custom actions.

GetProductsEvent custom action

The GetProductsEvent custom action is called anytime you interact with the item selection menu. This custom action is located on an open quote or order in the **Items** tab. This custom action enables you to override core implementation to filter available products that are based on the logic you define.

Creating a GetProductsEvent custom action

1. In Sales Portal Admin, select **Application Settings** > **Custom Actions**.
2. In the **Location** field, select the GetProductsEvent custom action.
3. Specify this information:

   Name
   Specify the name. Example: GetProductsEvent

   Resource ID
   Specify the resource ID. Example: MyResource

   Location
   Specify the location. Example: GetProductsEvent

   Refresh on Finish
   Example: Checked

   Sequence
   Specify the sequence. Example: 40

   Icon
   Example: pic.jpg

   Title Resource ID
   Specify the title resource ID. Example: resourceID

   Launch Preference
   Specify the Launch Preference. Example: No User Interface

   Processor Type
   Specify the processor type. Example:
   SampleCustomActions.GetProductsForCategoryCustomAction.SampleCustomActions

Configurations for ION

Configure Sales Portal Administration to generate BODs and place them in a message outbox where Infor ION can retrieve them. For more information on completing the configuration between Sales Portal and ION, see the *Infor Configure Price Quote Sales Portal Configuration Guide for Infor ION* Guide.

ION Parameters

ION parameters in Sales Portal can be configured in a new module tab located **Application Settings** > **ION Parameters**, to successfully process BODs. To save your configuration in the ION parameter settings, click Save. The ION parameters that can be set in Sales Portal include:

- xmins
- xsi

- xsd
- schemaLocation
- versionID
- releaseID
- BODType
- TenantID
- LocationID
- AccountingEntityID
- FromLogicalID
- ComponentID
- ToLogicalID

BOD Service Dashboard

The BOD Service Dashboard appears in Sales Portal at **Application Settings** > **BOD Service Dashboard** and is used to call jobs from a single grid. This dashboard uses Hangfire dashboard to create a seamless user interface and user experience. Before publishing BODs, you must turn on the Process BOD functionality. The Process BOD switch is located in Sales Portal at **Application Settings** > **BOD Service Dashboard** > **Service Information** > **Process BOD**. When the Process BOD is off, the status is set to **Inactive**. When the Process BOD is enabled, that status field will be set to **Active**. The service dashboard includes these statuses:

- Succeeded

  The BOD was mapped successfully
- Enqueued

  The BOD is waiting to be mapped
- Failed

  The BOD was not mapped successfully

Inbox Clean-Up

Incoming BODs that are received in Sales Portal can be set up to be "cleaned" or deleted from the BOD Service Dashboard automatically. When an Incoming BOD is deleted using this functionality, no confirmation message indicating that expired BODs were deleted will be displayed. Set the duration of BODs in the BOD Service Dashboard by specifying an expiration day count in the **BOD Retention Duration No. of Days** textbox. This textbox enables the system to automatically delete BODs that have reached the specified maximum day count with the default value being five, the minimum value being one, and the maximum value being 30. This BOD clean-up functionality does not include BODs that are in an Enqueued status. BODs that have a status of either Succeeded or Failed will be automatically deleted from the dashboard once the specified or default retention duration has been met.

Understanding application settings

Use application settings, available to users with manage dealer privileges, to view and add payment and shipping-related terms and policies found throughout the application.

Application settings are either order placement or default. Order placement application settings display on the **Order Placement Defaults** tab. Order placement terms are between the manufacturer and the dealer. Default application settings display on the **Header** tab of a quote. These terms are between the dealer and the end customer. Default application settings are referred to as pre-defined in the Sales Portal client application. Default values can be disabled but not deleted.

These tables show the available application settings in the Admin System:

This table shows the available payment methods options in the Admin System:

Name	Description
On Account	The amount due is charged to the customer's account.

This table shows the available payment terms options in the Admin System:

Name	Description
Immediate	Payment due on receipt of invoice
Net 10	Payment due 10 days after invoice
Net 15	Payment due 15 days after invoice
Net 30	Payment due 30 days after invoice
Net 45	Payment due 45 days after invoice

This table shows the available shipping policies options in the Admin System:

Name	Description
No Preference	The order is treated as any normal order in the system.
Ship Complete	The order is shipped on one single shipment. Depending on the availability of the items, it might take longer for the item to ship.
No Backorders	The order is shipped as soon as inventory is reserved. No items are backordered for this order. After the goods are shipped, the order is closed.
Ship Partial	The order may be shipped in different shipments. As soon as items become available, items are shipped to the customer. This shipment method may incur additional shipping costs, but the customer receives available items faster.

This table shows the available freight term preferences options in the Admin System:

Name	Description
Cost and Freight	Shipper pays to port of import, balance consignee
Freight Collect	Freight Collect, consignee pays all charges
Delivered Duty Paid	Delivered Duty Paid, VAT unpaid
Warehouse Dock	The warehouse dock freight preference
Freight On Board	Shipper pays to port of export, consignee balance
Prepaid	Shipper pays all shipping charges
Shipping, Duties and Taxes	Shipper pays shipping, duties, and taxes

This table shows the available shipping carriers options in the Admin System:

Name	Description
ABF Shipping	Preferred shipping carrier selection
Pilot Air Freight	Preferred shipping carrier selection
Town Air Freight	Preferred shipping carrier selection
TST Overland Express	Preferred shipping carrier selection
United Parcel Service	Preferred shipping carrier selection
Yellow Freight	Preferred shipping carrier selection

This table shows the available quote statuses options in the Admin System:

Name	Description
Abandoned	Abandoned quotes become read-only.
Closed	Closed quotes become read-only.
Expired	Quotes are marked as expired after their expiry date.
Lost	Lost quotes become read-only.
Open	New quotes default to this status.
Ordered	Quotes become ordered once they are converted to orders.

Adding application settings

1 Select **Application Settings**, and then select a category.

2 Click **Create**.
3 Specify this information:

Name
Specify a unique name.

Report Type
If available, then specify the Report Type.

Type
Specify the type of application setting.

Caption
Specify the resource created for the application setting. The application setting name displayed in Sales Portal is based on the resource value and language setting of the user.

Code
If available, then specify the code for the shipping carrier. This value is stored in the Sales Portal database's ShippingCarriers table as the ShortName.

URL
If available, then specify a URL for the application setting.

Layout
If available, then specify the layout.

Sort Order
If available, then specify a number. A value of 1 displays first.

Enabled
Select the check box for the application setting to display in the client application.

Adding reports

Before adding reports, enable reports from the application section of preferences to view reports from the Sales Portal navigation bar.

1 Select **Application Settings > Reports > Create**.
2 Specify this information:

Report Type
Specify the report type. Use **Link** reports to open a web site provided in the **Url** field.

Url
Specify a full Url for link reports. The file name of the report or PDF located in your CPQ instance's `Sales Portal/Client/Reports` folder.

Caption
Specify a caption.

Enabled
Select the check box for the report to display in the client application.

Working with system messages

7

This section provides information on the creation and management of system messages. Use system messages to communicate to specific users through the Sales Portal client application.

Creating a message

You can use messages to communicate information to specific Sales Portal users. You can publish messages to all dealers or to a specific dealer registered in the Admin System.

1 Select **Messages > New**.
2 Specify this information:

Application
Select the Sales Portal application.

Effective Date/Expiry Date
Set the effective date and expiry date to correspond with the dates you want the message to display to the user.

Name
Specify a descriptive name for the message.

Level
Specify the level icon that is associated with the message. The level does not change the arrival date of the message. Level icons are only visual indicators of the message's importance.

Message

Specify the message to display in Sales Portal.

Customer Name
Select the users who can view the message in Sales Portal.

Action
Optionally, specify URLs to websites or PDF files to add to the message. View the action from the message's **More Information** button in the Sales Portal client application. URLs must be valid and accessible from the internet.

Published
Select this check box to publish the message. Unpublished messages are not displayed in Sales Portal.

Viewing messages

Published messages display to the specified users in the Sales Portal client application. Published messages are visible in the system messages section on the home page, and Sales Portal search grids.