# Infor Product Configuration Management Sales Portal User Guide

Release 8.1

## Publication Information

Release: Infor Configure Price Quote Sales Portal 8.1
Publication Date: July 13, 2018
Document code: cpqsp_8.1_spug__en-us

# Contents

# About this guide

This guide provides information for understanding, navigating, and using the Sales Portal client application.

### Intended audience

The intended audience for this guide is users and administrators who are responsible for managing their organization's quoting and ordering through the Sales Portal client application.

### Organization

This table describes the sections of this guide:

| Section | Description |
|---|---|
| Getting Started with Sales Portal | An introduction to terms and concepts that are related to Sales Portal and information regarding application startup and navigation |
| Working with customers and contacts | The creation and maintenance of customers and contacts |
| Working with quotes and orders | The creation and maintenance of quotes and orders |
| Understanding projects and jobs | The creation and maintenance of projects and jobs |
| Understanding proposals | How to set proposal preferences and customize proposal documents |
| Personalizing Sales Portal | Sales Portal application settings and preferences, and the creation of company and user profiles |

## Contacting Infor

If you have questions about Infor products, go to the Infor Xtreme Support portal.

If we update this document after the product release, we will post the new version on this website. We recommend that you check this website periodically for updated documentation.

If you have comments about Infor documentation, contact documentation@infor.com.

# Getting started with Sales Portal

1

Sales Portal is a comprehensive pricing, quote generation, and ordering system for selling both configured and standard products through all your channels, including dealers, distributors, and your direct sales force.

For optimal performance, Sales Portal is supported with:

- Internet Explorer 11
- Windows 10
- Windows Server 2016

## Understanding the Sales Portal workflow

Some information in Sales Portal require prerequisites before they can be created. For example, you must create a customer before you can create a contact and you cannot create a job without an existing project.

The basic workflow progression with in Sales Portal:

1. Create a customer.
2. Create a contact.
3. Create a project (if applicable).
4. Create a job (if applicable).
5. Create a quote.
6. Create an order.
7. Print a proposal (view and print finalized quotes and orders).

## Updating browser settings

Sales Portal supports a wide range of desktop and mobile browsers.

- Tablet users: iPad and iPhone requires the current version of iOS. Sales Portal supports iOS 5.0.1 and newer.
- Safari users: In your browser, ensure that tabbing behavior highlights each item on the web page. Ensure that the control to accept third-party cookies is enabled.
- Internet Explorer 9, 10, and 11 users: In your browser, ensure that you clear the control to display intranet sites in compatibility view. Ensure that you clear the control to display all websites in compatibility view.
- Google Chrome users: In your browser, clear the control to clear cookies and other site and plug-in data when I close by browser.

# Signing into Sales Portal

1. Select **Start > PCM > PCM Sales Portal 8.1 > PCM Sales Portal 8.1**.
2. Specify your **User ID** and **Password**.
3. Optionally, select the Keep me logged on checkbox.
4. Click **Sign-In**. The home page or desired entity search grid appears. This is customizable through the admin system.

# To reset your password

You can reset a forgotten password when logging in to Sales Portal. Clicking to reset your password will direct you to the Reset Password Page where you must specify your User ID and a generated captcha code. You will then receive an email that contains a link to complete your password change successfully.

1. Navigate to the Sales Portal User Log in screen.
2. Click **Forgot Password?**
3. Specify this information:

   **User ID**
   Specify your Sales Portal User ID

   **Enter code from Above**
   Enter the generated captcha code that appears above this field.

4. Click **Reset Password**.
5. In the received email, click the**Change My Password** link. You will be directed to the Change Password page.
6. Specify this information:

**Password**
Enter a new password to associate to your Sales Portal User ID.

**Confirm**
Re-type your new password to confirm the new entry.

7 Click **Change Password**.
8 Navigate back to the Sales Portal User Log in screen and log in using your User ID and new password.

# Understanding the home page

The home page provides access to Sales Portal and provides access to other Sales Portal add-ons, web pages, and documentation.

If enabled, then the system messages toolbar shows system messages sent to the current user's account through the Sales Portal Admin System.

## Using the navigation bar

| Button | Description |
|---|---|
| Home | Returns you to the home page. |
| Quotes | Create a new quote or search existing quotes. See Working with quotes . |
| Orders | Create a new order or search existing orders. Individual user access to orders is controlled by the order privilege setting in the Admin System. See Working with orders . |
| Customers | Create a new customer or search existing customers. |
| Projects | Create a new project or search existing projects and related jobs. |
| My Items | Create a new my item or search existing my items. |
| Account Information | My Profile: Shows the profile and user-level application settings for the user currently logged in. See Understanding user and company profiles.<br>My Company Profile: Shows the company information linked to the user currently logged in. Access will vary depending on your Manage Dealer setting in the Admin System. See Understanding user and company profiles for more information on creating and editing this profile.<br>Help: Shows the Channel Sales documentation. |

| Button | Description |
| --- | --- |
| | Log Off: Logs off the system and returns the application to the Login dialog. Be sure to logout before attempting to login with a different user. This ensures that the original session has ended properly. |

# Searching for information in Sales Portal

You can use the search option to search for information in Sales Portal using the Search field or the grid columns to filter your search criteria.

1. Select a tab from the navigation bar.
2. Select **Search**.
3. Specify your search criteria. To clear the search filter, click the **Eraser** button.
4. To sort the search results, click a column header.
5. To work with a particular record, select an option from its action menu. You can open, copy, and delete a record. You can also print and export quotes and orders.

## Searching on-behalf-of a dealer

When you search for a dealer as an on-behalf-of user, only dealer companies that the representative has access to, based on the user's assigned locations, display.

- You cannot go on-behalf-of a direct sales customer.
- Dealers must have at least one representative before they display in the item list.
- On-behalf-of users can be assigned locations.

When going on-behalf of a specific dealer, the representative can only associate entities to the specific subset of locations that are assigned to that user for the on-behalf dealer company.

On-behalf-of users can perform a quote search without first selecting a dealer company to go on-behalf of. In this scenario, the quote results are filtered by the locations the on-behalf-of user has access to. When selecting to work with a specific quote from the search results, the representative will automatically be placed into on-behalf-of mode for the dealer company from which the quote originated.

See the *Infor Product Configuration Management 8.1 Sales Portal Admin System User Guide* for more information.

# Working with customers and contacts

2

Create and manage customers and contacts in the Sales Portal system.

## Understanding customers

A customer is a company or organization that employs contacts. You may have different categories of customers, such as dealers, distributors, or contractors depending on your company policies.

When creating a quote, you can select a customer to associate with the quote. This step is optional. After you select a customer for the quote, the customer information is displayed in the **Header** tab.

You can change your preferences for many of the options and features to customize your view. See Changing preferences.

The **Ship-to Addresses** tab maintains the list of ship-to addresses that display in the tab's search grid.

The **Default Terms** tab includes information about discounts, markups, tax, and payment terms. It also includes shipping preferences. The business terms data represents terms between the dealer and the customer. You may have different terms for each individual customer. When you change the upcharge, markup, or tax on this tab, the changes affect only this customer and their quotes. You can also change the discount, markup, and tax for each customer quote, using the **Pricing** tab on the Quote dialog.

Use the **Contacts** tab to add contacts and contact information for a customer. Create a customer before creating a contact.

Use the **Customer Currency** fields to define a default currency and exchange rate for a customer. After the default currency and exchange rate have been defined, these will override the MFG Base Currency, the Dealer Currency, and the Exchange Rate (if defined) on a quote or order. When defined, these values are passed as input parameters to the Configurator for Configured Items.

## Creating a customer

1 Select **Customers > New**.

2 Specify this information:

**Customer ID**

This field shows a system-generated customer number that uniquely identifies each of your customers. The field is not editable.

**Address**
Specify the customer's address. This address is referred to as the bill-to address.

**Status**

Specify the customer status. In this option list, choose between Active and Inactive. Instead of deleting a former customer, make that customer inactive.

**Type**

Select the type of business the customer operates. Examples include Builder, Contractor, and Architect.

**Default Contact**

Select the name of the default contact that you associated with the customer. After creating a customer, you can create a contact for the customer. If you create several contacts for the customer, then you can return to the customer and specify one of the contacts as the default contact.

**MFG Base Currency**
Shows the MFG Base Currency, defined by the Manufacturer in the Admin System.

**Customer Currency**
Specify the default currency for the customer. When defined, the Customer Currency overrides both the MFG Base Currency and the Dealer Currency (if defined). This option is available when the Multi-currency preference is enabled. This value is also used to default the reporting currency on the quote level.

**Exchange Rate**
Specify the exchange rate between the MFG Base Currency and the Customer Currency. This option is available when the Multi-currency preference is enabled. If you adjust the exchange rate on the customer level, then it represents a manufacturer (MFG Base Currency) to customer (Customer Currency) relationship. Use this exchange rate to calculate the prices of items in the Quote Lines section of a quote and to view items on the pricing tab of a quote. When defined, this overrides the Exchange Rate set at the Dealer Level (if defined).

**Enabled in all locations**
Specify if the Customer is enabled in all current and future locations that are created for the dealer by the system administrator. When the Enabled in all locations setting is enabled for a customer, the Locations Access Grid is displayed in read-only mode. This setting overrides all current Location access records for a customer. If existing locations are enabled and this box is selected and then later deselected, the previously enabled locations are retained. However, if there are locations that were initially disabled before the Enable All checkbox was selected and there are now active, Quotes, Orders, or projects associated with these locations then these locations will be automatically enabled. Only users with the Manage Dealer privileges are able to update this setting.

**Default Ship-to**
Select the default ship-to address for the customer from this option list.

3 Optionally, select the **Ship-to Addresses** tab.
4 Click the **New Ship-to** button and specify the customer address information.
5 Click **OK**.
6 Select the **Default Terms** tab and specify the customer pricing, business, and shipping terms information. Specify percentages as integers with up to two decimal positions.

# Enabling the Customer in a Dealer Location

The **Dealer Locations** tab only appears if the system administrator has enabled Location Security for the dealership. Enable the customer in the search grid in any of the available locations that the logged-on representative has access to. When creating a customer, all of the locations that the representative has access to are enabled by default. When the Enabled in all Locations setting is enabled for a customer, the Locations Access Grid is displayed in a read-only mode. The Enabled in all Locations setting overrides all current Location access records for a customer.

## Enable or Disable the Customer in a Location

1 Select the check box in the Enabled column.

## Enabling All Locations

1 Click Enable All to enable all locations that are currently displayed in the search grid.

## Disabling All Locations

1 Click Disable All to disable all locations that are currently displayed in the search grid.

# Creating a ship-to address

Create ship-to addresses for customers who use addresses other than their bill-to address for shipping purposes.

1 Select the **Ship-to Addresses tab > New Ship-to Address** button.
2 Specify the ship-to information.
3 Click **OK**.

# Creating a contact

A contact, specifically a default contact, is typically the person you interface with the most from your customer's company. Assign each customer a default contact.

1. Select **Customers > Contacts tab**.
2. Click **New Contact**.
3. Specify the contact's information.
4. Click **OK**. If this is the first contact created for this customer, then the contact is now the default contact. You can add as many contacts for a customer as you want, but you can only select one default contact.

# Working with quotes and orders

3

Create quotes and orders in the Sales Portal system. You can create a quote and convert it to an order. You can also create an order without creating a quote.

## Viewing quotes and orders in read-only mode

Orders or quotes that have a status that is not open can be launched in a read-only view. While in read-only view, fields set for each individual quote or order will be viewable, but not editable. This functionality enables you to verify order information, such as information associated with header attachments, line attachments, and order details. When in read-only view, you can:

- View and open header attachments
- View and open line attachments
- View the Proofing Report
- Print the quote or order
- Preview the original quote or order
- Copy the order to a new quote
- Export the quote or order
- Delete the quote or order
- Generate a proposal using Document Automation (If enabled in Sales Portal Administration)
- View the price adjustments worksheet
- View all information detailed in the header, pricing, items, and comments tab

## Understanding Quotes

Use the Quote dialog box to create a new quote for a customer. Add and configure items, set pricing, and specify shipping and contact information to the quote **Header** and **Comments** tabs.

The **Header** tab contains additional information about the quote. This information only applies to the current quote. For example, if you change the ship-to address, the address changes only for the current quote. The system will not save the new address to the main customer information record.

- Use the Shipping Information section to enter the shipping preferences for this order. For example, you can select to ship an order in full or as a partial shipment, as items become available for shipping. You can select the freight terms, a carrier, method, and ship date in this section.
- Use the Payment Information section to enter information on payment terms and methods for this particular quote. Include exchange rates and reporting currency for international users with the Multi-currency preference enabled in the Admin System.

  If you manipulate the reporting currency and exchange rate on the quote level, then it represents a dealer (dealer currency) to end customer (reporting currency) relationship. The exchange rate set here will be honored on the quote proposal print report. If a Customer Currency has been defined for the current customer, then the Customer Currency will be displayed and the Reporting Currency will default to the Currency that is defined for the customer.
- Use the Contact Information section to select the primary contact for this quote. You can also enter the contact's e-mail address, phone numbers, and fax number in this section.

The **Pricing** tab contains your additional discount to the customer, upcharge, and tax information. Add or change this information to determine how the price is calculated.

Sales Portal automatically generates the system and customer business terms when you create a new quote. These defaults display on the **Pricing** tab. You can overwrite them for this particular quote without affecting your original system default business terms or the customer business terms that are already established.

The **Items** tab contains item configuration information for the quote.

- Use the Item Selection section to select your item and the associated configuration options. Then add the item to the quote.
- Use the Quote Lines section to view the item pricing and configuration information. You can also modify the items and adjust the pricing information.

## Subline items

Subline items may be created as the children of a Parent Configured item. They show as indented, read-only items, under the Configured Item. The Sublines are numbered using this notation:

- ParentLineNumber.SublineNumber (e.g. 1.1, 1.2, 1.3…) and are separated by a dotted line in the Quote Lines Section

Sublines may be created from a configured items ruleset through the use of an Integration Rule that uses the CreateSalesPortalSubline template. The template is installed from the Sales Portal Admin System.

### Support for Subline items in the quote lines section

- Non-configurable items may be returned as Subline items. These items must already be defined in the Admin System. Configurable, My Items, and Write-in items are not supported for return as Subline Items.
- The Price of the Configured Parent Line is the Rolled up Price of the Sublines Item(s)
  - Pricing Adjustments are not available on the Configured parents line when Sublines are present.
- Pricing Adjustments are supported on Subline items and will cause the Price of the Configured parent Line to be recalculated.
- The Label may be manually updated in the Quote Lines Section.
- If a value is not specified, when the value is defined in the Admin System will be used when creating the SubLine Item. These fields can be updated from the CreateSalesPortalSubline Integration Rule:
  - Item Number
  - Description
  - Quantity
  - UOM
  - Unit Price
  - Label
  - Sequence
- If a Non-Configured item has an Image link defined in the Admin system, then the image will be displayed for the item.
- When a Configured Item is reconfigured, the Sublines items will be refreshed based on the latest successful Configuration result.
- Copy is not supported for Subline Items. If a Parent Line is copied that contains Sublines, then those Sublines will be copied along with the Parent Line.
- Attachments are supported on Subline Items.
- Comments are supported on Subline Items.

## Advanced Search for customers

Complete this task to use the Advanced Search for customers feature. The Advanced Search feature is available for quotes, orders, and projects.

To perform an Advanced Search for customers:

1. In Sales Portal, open your required quote.
2. In the Customer field, select the **Magnifying Glass** icon to launch the Advanced Search feature.
3. Perform the required search by entering filter information in any of these columns:
   - Name
   - Address
   - City
   - State

4 Select your required customer line.

## Visual Product Catalog

On the Quotes page, you can select the **Product Catalog** button to open the Product Catalog categories window. This functionality enables you to select line items based on pre-configured images that are associated to each item. Search functionality that is based on the item name and description is enabled in the Product Catalog categories window. The visible categories and their corresponding sub-categories and associated images are defined in Sales Portal Administration under **Product Maintenance** > **Categories**.

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. Allow to process for several minutes before completing this action by performing an F5 refresh to your Sales Portal screen.

Use the Visual Product Catalog to add items directly to your quote. Each product contains an associated **Add** and a **Details** Button.

**Add Button**
Click the **Add** Button to add the associated item to your open quote.

**Details Button**
Click the **Details** Button to view all details, including the filter attributes, associated with that product. You can add the product to your quote from the Product Details window by specifying the required number in the **Quantity** field and clicking **Add**.

### Advanced search using facets

Visual Product Catalog enables advanced searching capabilities using a filter that narrows your results based on set item attributes (facets). Narrow your search results by checking available boxes next to the facets that match your required filtered result. This narrows your available results to include only the facet information that matches your search criteria. All of these additions can be seen in the advanced product catalog after completing the initial search criteria. See the Infor Sales Portal Administration User Guide for information about adding facets to a product.

Before you begin using the Visual Catalog or advanced filter features, select **Preferences** > **Quote/Order Maintenance** > **Advanced Filtering** and click the **Refresh Data** button. Allow to process for several minutes before completing this action by performing an F5 refresh to your Sales Portal screen.

### Associating a language to a Dealer Representative

1 In Sales Portal, select **Account Information** > **Help**.

2 Select the **Representatives** Tab.

3 Open your required dealer from the list.

4 In the Application Settings section, select your required language in the **Language** field menu.
5 Click **OK**.
6 Re-log in to Sales Portal with the edited dealer's login credentials to view the translated environment.

# Working with quotes

Create and maintain quotes in the Admin System.

## Creating a quote

Before creating a quote or order for a customer, you must create the customer in Sales Portal.

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

**Location**
If location security is enabled, then select a dealer location.

**Customer**

Optionally, select a customer from the option list. When selecting a Customer that has a different Currency and Exchange Rate as defined in the Customer Information record, the current quote and all lines will be recalculated using the new Customer Currency and Exchange Rate. When selecting a new location on an existing quote where a customer has been selected and the customer exists in the new location then the customer selection will be maintained.

**Quote Name**

Specify a unique name for the quote.

**Version**

Optionally, create a new version for the quote. Quote versions with a status of Lost or Abandoned are removed as a selection from the list. Each version is its own entity and is identified by number at the end of the Quote ID. When a version of a quote is converted to an order, all other versions of the quote become inactive.

3 Click the **Header** tab.
4 Specify this information:

**P.O. Number**
Assign a customer purchase order number to the quote.

**Quote Status**

Assign a status to the quote. If you select **Lost** or **Abandoned**, then the quote is saved in the system, and the quote is closed and no longer editable. To work with this quote again, you must export the quote and import it into a new quote. Lost and Abandoned still have meaning when an opportunity was not won, so it is important to retain the disposition of those quote versions.

**Project**

Optionally, associate the quote to a project. If there are no existing projects, then this option is inactive.

**Job**

Optionally, select a job that is associated with the project you selected for this quote. If there are no existing jobs, then this option is inactive.

**Available to**

The field shows an automatically generated expiration date. The default expiration date for a quote is thirty days. The manufacturer can override this setting.

**Ship-to**

Specify the ship-to address. You can select Use Bill-to Address if the ship-to and bill-to addresses are the same or you can enter a new ship-to address.

**Shipping Information**

Specify the shipping preferences for this order. For example, you can select if you want the full or partial order shipped, as items become available for shipping. You can select the freight terms, a carrier, method, and ship date in this section.

**Payment Information**

Specify the payment terms and methods for this particular quote. Include exchange rates and reporting currency for international users with the Multi-currency preference enabled in the Admin System.

If you manipulate the reporting currency and exchange rate here, on the quote level, then it represents a dealer (dealer currency) to end customer (reporting currency) relationship. The exchange rate set here will be honored on the quote proposal print report and available for change in the Print Options dialog box. If a Customer Currency has been defined for the current customer, then the Customer Currency will be displayed and the Reporting Currency will default to the Currency defined on the customer.

**Contact Information**

Specify the primary contact for this quote.

5. Click the **Pricing** tab. Specify percentage or a dollar amounts in the text boxes to customize pricing for the quote. All changes update on the **Items** tab when you create a quote.
6. Specify this information:

**Price Adjustments**

Use the Price Adjustments dialog box to adjust prices for individual lines added to the quote. When a Configured Item contains Subline child items, then all pricing adjustments must be made at the Subline level. This will cause the Configured Items discount and price to be recalculated.

**Columns**

The Header Level column displays default values for each row. The Effective Values may differ from these if you make line changes in the Price Adjustments dialog. The Values of Interest column displays calculated prices after you add items to the quote. The Totals column shows the values displayed on the quote proposal.

**My Cost**

Specify the price of the item from the manufacturer.

**My Upcharge**
Specify the increased selling price to the customer.

**Quote Subtotal (List Price)**
Specify the sales price to the customer before any additional discounts. The sales tax is calculated.

**Additional Discount**

Specify additional discounts to the customer. Discounts that you specify here display on your quote proposal document as an additional discount. This percentage automatically defaults from your customer's default business terms. You can override this discount. This field reduces the final price by the amount specified in the discount. Include comments in the pricing comments box to track these adjustments. These comments do not print on the proposal document.

**Adjusted Subtotal (Discounted)**
The price you sell the item for after additional discounts and tax calculation.

**Tax**

This percentage defaults from your customer's business terms and displays on the quote proposal document.

**Labor Tax**
This attribute enables you to separate standard tax from tax on labor items and to give different tax rates. This is used at the product level (products, my items, and write-ins) to indicate if the item is a material or labor item. This field is available in a quote header for material tax, labor tax, material amount, and labor amount. When creating a new Quote and specific Customer, it takes the Customer's Labor Tax and applies it to the Quote. When adding a Line to a Quote that is marked as Labor, that line gets the Labor Tax rate that is assigned to the quote. Set this attribute at **Customer** > **Default Terms** > **Business Terms**.

**Other Charges (Specify)**

Optionally, specify additional charges associated with the order. Specify the reasons for the charges on the quote header comments and set the quote preferences to show quote comments on the proposal document.

7. Click the **Items** tab.
8. Specify this information:

**Item**
Select an item from the option list.

**Label**
Specify a label for the item.

**Quantity**

Specify a quantity for the item.

**9** Optionally, use the controls on the **Configuration Options** tab to select your options. The options on this tab are set through constraint models in Design Studio.

**10** Click **Add**. The items are added to the quote and are shown in the Order Lines section.

**11** Optionally, click **Named Configurations** to manage named configurations for individual configurable lines.

**12** Optionally, click **Add Write-In Item** to add a write-in item to the quote.

**13** Optionally, click the **Configure** button to view and select more options for this item.

**14** Optionally, click **Print** to view the quote proposal.

## Configuring an item

This table shows the buttons that you use to perform various actions when you click **Configure** to configure an item:

**Note:** Certain configurator functionality is unavailable for tablet users. Tablet users can not use the Print orFull Screen links. You may experience a lack of vertical and horizontal scroll bars due to thetouch-screen interface.

| Button | Description |
|---|---|
| Continue or Finish | Either the **Continue** or the **Finish** button appears on the top and bottom toolbars. This depends on where the user is in the options selection process. The **Continue** button appears until the final page. When you complete your options, the **Finish** button displays. |
| Print | Prints the detailed options for the item. |
| Cancel | Cancels the detailed options selection process and returns the user to the quote or order. |
| Price | Shows the price of the item in configuration and updates as you select options that affect the price calculation. |
| Detail | Opens a price detail summary in the visualization pane to display the price breakdowns for individual options on the item. |
| View | Provides visualization view options that display in the pane. |
| Full Screen | Opens the selected view in a new window. |
| Zoom | Appears when you select Image as your visualization view. |
| Move | Change the image position in the Visualization pane. Appears when you select Image as your visualization option. |
| Reset | Resets the image to the original position and zoom level. Appears when you select Image as your visualization option. |

# Creating Sublines

Subline items are created as children of a Parent Configured item and are displayed as indented, read-only items under the Configured Item. Sublines are created from a Configured Items Ruleset though the use of an Integration Rule. This Integration rule uses the CreateSalesPortalSubline template that has been installed from the Sales Portal Admin System in the Quote/Order Maintenance Preferences.

If the Quantity of a Subline Item(s) is determined by the Configurator, the "Cfg on Qty Change" flag should be enabled on the Configured Product Record in the Sales Portal Admin System. This will ensure that if a user changes the quantity on the Configured Line, then that configuration will be validated and the quantities on the Subline Item(s) will be refreshed based on the output from Configuration. If the "Cfg on Qty Change" flag is not set on a Configured Item that contains Sublines and a user updates the quantity on the Configured Line, then Sales Portal will attempt to recalculate the Sublines and maintain the existing ratio of Configured Line to Subline. If Sales Portal can not maintain this ratio, then the Configured Line will be marked as invalid and must be validated or reconfigured.

When an item is reconfigured, then the Sublines are refreshed based on the output of the last successful Configuration. If there are Sublines in the result set from re-configuration that have IntegrationOutputID's that match an existing Subline IntegrationOutputID, then the existing Subline will be refreshed and the Attachments, Comments, and Pricing Adjustments will be maintained. If there are Sublines in the result set from re-configuration that have IntegrationOutputID's that do not match an existing Subline's IntegrationOutputID, then a new Subline will be added. If there are existing sublines that have IntegrationOutputID's that are not in the result set from re-configuration, then those Sublines will be deleted along with any associated content. The template contains these fields:

- CreateSalesPortal Subline Integration Rule Template
  - IntegrationOutputID
    - Default Value: =Create(Guid)
    - The ID the integration will use to reference this data. (Set a unique value for each Subline or use the function =CreateGuid() to generate one).
  - ItemNumber
    - Default Value:
    - The Item Number for the Subline. This should be an existing product number defined in the Admin system.
  - Description
    - Default Value: =Null
    - The description for the Subline. If set to Null, then the description in the product record in the admin system will not be used. (Set to Null to use Sales Portal record description).
  - Quantity
    - Default Value: =1*input.quantity
    - The quantity for the Subline (If a value is not specified then the Quantity will be set to the Configured Line Quantity in Sales Portal).

- UOM
  - Default Value: =Null
  - The unit of measure of Subline item. If set to Null, then the UOM in the product record in the admin system will not be used (Set to Null to use Sales Portal record UOM).
- UnitPrice
  - Default Value: =Null
  - The Unit Price for the Subline. If set to Null, then the price in the product list pricing record in the admin system will not be used (Set to Null to use Sales Portal product list pricing).
- Label
  - Default Value: =Null
  - The label for the Subline. (Set to Null to use existing Sales Portal Subline label).
- Sequence
  - Default Value: =0
  - The sequence for the Subline relative to other Sublines that are associated with the same parent. This will control the numbering of the Sublines that are generated in Sales Portal. For example: 1.1, 1.2, 1.3. If a value is not specified, then a sequence of 0 will be used and the lines will be added to Sales Portal in the order the rules were executed.

# Using rapid change

Use Rapid Change to change one or more configuration options to selected lines of a quote or order.

1. Select a quote or order and click **Rapid Change**.
2. Select your item's constraint model from the Filter By list to load the item's configuration options. The option list is populated by values from the **ConstraintCaption** field in Products table of the Sales Portal database.
3. Select the check box next to the options you want to apply.
4. Select the Apply Options check boxes on the individual lines to be changed or select the **Select All Lines** button.
5. Click the **Apply Options** button to apply the new option selections to the specified lines.

# Configuring global options

The **Global Options** tab in the Item Selection section enables you to select an item's global options. This tab will only be active if the global constraint model has been enabled and defined through Design Studio.

To enable the Global Constraint Model:

1. Open your PCM instance's `SalesPortal\Client\Configuration\appSettings.config` file.
2. Set the **GlobalConstraintModelDefined** key value to **"True"**.
3. Save the file.
4. Perform an iisreset on the server.
5. In Design Studio, right-click in the constraint models menu and select **Create Global Constraint Model**. If this option is unavailable, then the global constraint model is already defined.

# Making adjustments to a quote line

After you add an item to the Quote Lines section, you can adjust individual line items.

1. Select a quote and locate the line item to adjust.
2. Click **Change Options** to run the configurator and change the configuration options for the item.
3. Change Options and Click **Price Details** to display detailed price information for a configurable item. This option can be enabled or disabled from the Quote/Order Maintenance preferences in the Admin System.
4. Click **Adjust Price** to make line level price adjustments. For Configured Items that contain Sublines, the Adjust Price link will not be displayed. All pricing adjustments must be maintained on the Subline items. Any adjustments you made on the Subline items will cause the price of the Configured Parent item to be recalculated. Pricing Adjustments on Subline items are maintained when the Configured Parent item is reconfigured if the IntegrationOutputID is the same for a given subline item in the current configuration and the reconfiguration result.
5. Click **Name Configuration** to save individual line configurations for fully or partially configured items. They may be created for the user, company, or location. The For Location option displays if location security is enabled. After added, configurations are maintained from the **Named Configurations** button in the Item Selection area. Use this dialog box to search for and remove configurations, and add quantities of a configuration as a line. This option can be enabled or disabled from the Quote/Order Maintenance preferences in the Admin System.

# Converting a quote to an order

1. Click **Place Order**. You must have at least one item in the Quote Lines section to select this option.
2. Click the **Place Order** button to submit the order to the manufacturer. A message box is displayed with an order number and confirmation that the order is placed.

# Exporting all quotes lines

This option does not export any Header or Pricing information for the quote. Sales Portal supports quote line export. If any Configured lines contain Subline items, then the Sublines items are also exported. The export process varies based on browser and settings and is not supported for tablet users.

1 Select **More > Export**.
2 To export the quote lines, save the XML to a file location.
3 Exit the download dialog box.

## Importing quote lines

This option does not import any Header or Pricing information from the quote. This option will import any Configured items that were exported with Sublines. The import process varies based on your browser and settings and it is not supported for tablet users.

1 Select **More > Import**.
2 Select the **Choose File/Browse** button to locate to file on your computer.
3 Click **Import**. The imported quote or line items are added to the Quote Lines section and validated.

## Attaching a file to a quote/order

This functionality enables you to attach one or more files to a quote/order. When one or more files is attached at the header level, an **Attachment** icon will be displayed next to the Quote ID.

To attach a file to a quote/order:

1 In Sales Portal, open/create a quote.
2 Click the **Attachments** button.
3 Click **New**.
4 Add a description in the **Description** field.
5 Click the **Folder** Icon in the **File** field to browse to the required file.
6 Click **Save**.
  The saved file will display as an entry in the attachments grid.
  Additional Options:
  - Delete: Navigate to the Actions icon > Delete to delete an attachment.

## Attaching a file to a quote/order line

Attach one or more files to a quote/order line or Subline in Sales Portal. When one or more files is attached at the line level, an **Attachment** icon will be displayed next to the Item name. Subline attachments on Subline items will be maintained when the Configured Parent item is reconfigured. The

IntegrationOutputID is the same for a given Subline item in the current configuration and the reconfiguration result.

**1** In Sales Portal, open/create a quote.

**2** Select the required quote line and select **More** > **Attachments**.

**3** Click **New**.

**4** Specify a description in the **Description** field.

**5** Click the Folder Icon in the **File** field to browse to the required file.

**6** Click **Save**.

**Additional Options:**

- Hide Line Attachments Button: filters the attachments grid to display only attachments at the quote/order header level.
- Delete: Select **Actions** icon > **Delete** to delete an attachment.

**Additional Options:**

- Hide Line Attachments Button: filters the attachments grid to display only attachments at the quote/order header level.
- Delete: Select **Actions** icon > **Delete** to delete an attachment.

# Opening a quote or order in a new tab

Complete these steps for each order you want to open in a new tab. Multiple orders can be open at once in their own tab.

## Opening a quote in a new tab

To open a quote in a new tab:

**1** Log in to Sales Portal.

**2** On the Quotes page, click the **Open** icon directly to the left of the required customer name.

**3** Select **Open New Page**.

### Opening an order in a new tab

To open an order in a new tab:

**1** Log in to Sales Portal.

**2** On the Orders page, click the **Open** icon directly to the left of the required customer name.

**3** Select Open New Page.

# Working with expired, lost, or abandoned quotes

An open quote is an active order. You can work with an open quote using the Quote dialog box. Quotes that are ordered, lost, expired, or abandoned are closed quotes that are no longer editable. To work with these types of quotes again later, export the quote and then import it into a new quote. Use the quote search grid to find closed quotes.

# Emailing a quote or order

1 In Sales Portal, open/create a quote.
2 Select the required Customer.
3 Click **Print**.
4 Click **Email**.
5 Specify this information:
   - From:
     Example: Representative@email.com
   - To:
     Example: Customer@email.com
   - Subject: (Quote ID)
     Example: SQC000035_1
   - Email Message
     Example: Dear Customer, attached is the quote you requested.

   See "Setting up default email fields" on page 29 for more information about these fields.
6 Click **Send**.

## Activating email services

1 Navigate to `C:\inetpub\wwwroot\PCM\Sales Portal\Client\Configuration`.
2 Open the `appSettings.CONFIG` file in a text editor program.
3 Locate these three SMTP references:
   - "SMTPServer"
   - "SMTPUsername"
   - "SMTPPassword"
4 Replace the three SMTP references with your company's SMTP server information.
5 Click **Save**.

## Setting up default email fields

Set the **To** and **From** fields, and the email message text with default information.

### Setting up the From: field

1. From Sales Portal Administration, click **Dealers**.
2. Open a dealer by clicking the name of the required dealer.
3. Under Representative Information, enter the required email address in the **Email** field.

### Setting up the To: field

1. From Sales Portal, select **Customers** > **Search**.
2. Open the required customer by clicking on the icon directly to the left of the customer name.
3. Click the **Contacts** Tab.
4. Open the required contact by clicking on the icon directly to the left of the contact name.
5. In the Contact window, enter the customer email address in the **Email** field.
6. Click **OK**.
7. On the Customer Information page, set the **Default Contact** field to the customer email address that should display by default on the email form.

### Setting up the default email message

1. From Sales Portal, select **Account Information** > **My Company Profile**.
2. Click **Preferences**.
3. Click the **Quote/Order Maintenance** tab.
4. In the Email Template section, enter the default email text in the **Default Email Template** field.
5. Click **OK**.

## Generating a Proofing report

1. Select **Sales Portal** > **Quotes**, and select or create a new quote.
2. Select the required customer in the customer drop-down menu.
3. From the **Items** Tab, add all line items to be included in the proofing report to the quote line.
4. Click the **Proofing Report** Button.

# Working with orders

## Creating an order

Before you begin, ensure that your Order Privilege is set to Can Order Directly. Dealer administrators can change this setting on the My Profile dialog box.

1. Select **Orders > New**.
2. If location security is enabled, then select a dealer location.
3. Optionally, select the customer from the Customer option list. When selecting a new location on an existing order where a customer has been selected and the customer exists in the new location then the customer selection will be maintained. When selecting a Customer that has a different Currency and Exchange Rate than the current quote, then all lines are recalculated using the new Customer Currency and Exchange Rate.
4. Click the **Items** tab.
5. Specify this information:

   **Item**
   Select an item from the option list.

   **Label**
   Specify a label for the item.

   **Quantity**

   Specify a quantity for the item.

6. Optionally, use the controls on the **Configure Options** tab to select your options. The options on this tab are set through constraint models in Design Studio.
7. Optionally, click the **Configure** > **Add** button to view and select more options for this item.
8. Optionally, click **Print** to view the quote proposal.
9. Click **Place Order**. The order terms are displayed and the quote is created.

## Viewing sales order status

This functionality enables you to see if a submitted order has been accepted or rejected by the ERP and/or if any errors were encountered during processing. The status of an order that has already been submitted to an ERP and has completed the Acknowledge BOD processing is displayed in the Order Search Grid, Information Message, Order Status Header, and in the Acknowledge information section. If an order is accepted by the ERP, a status of Accepted should be displayed for the order. If an order is rejected by the ERP, a status of Rejected should be displayed for the order. If a submitted sales order is rejected by the ERP, the reason why it was rejected should be displayed in the sales order Header information tab at **Acknowledge Information** > **Comment field**. Additionally, a rejected order enables you to go back, view, and resubmit the quote that created the order by clicking **More…** > **Go**

**to Source Quote**. After an order is placed in either an Accepted or Rejected status, the order cannot be changed.

# Understanding projects and jobs

4

Projects and jobs are an optional tool to help you organize your quotes.

## Working with projects and jobs

A project is a way to organize your quotes that are associated with a customer. For example, if you have a customer with several quotes, you can use the project feature to organize their quotes into projects. After you create a project, you assign that project to a quote on the Quote dialog while you are creating a new quote.

A job is a business entity associated with a project. A job requires a project. A job is another organizational tool that you can use to help you organize your customer's quotes. Projects and jobs are entities seen and used based on an internal setting that your company decides to turn on or off.

Use the Project Information section to specify a name for your project. Select a customer to associate the project to. Define the status (active or inactive), and provide a description. You must assign a name and customer to a project.

Use the projects toolbar to go to your last quote or to copy and delete the project.

Use the Jobs section to associate jobs to a project. You can also search for jobs that are associated to the project using the jobs search grid. Assigning jobs to a project is optional.

## Creating a project

1 Select **Projects > New**.
2 Select a customer from the **Customer** option list.
3 Select the status from the **Status** option list.
4 Optionally, specify a description.

# Creating a job

1. Search for the project that you want to associate with a new job.
2. Select a customer.
3. Click **New Job**.
4. Specify this information:

   **Status**
   Specify the status.

   **Name**
   Specify a name.

   **Description**
   Optionally, specify a description.

5. Click **OK**.

# Understanding proposals

5

After you create a quote or order from Sales Portal or Document Automation, you can create and view your customizable proposal document before it is sent to the customer. When selecting to preview a quote or order after clicking the **Print** button, a new tab is opened that contains the preview proposal document. The original tab will maintain the print options window view until closed. When selecting to print a document from the print options window, the document will print and the print options window will automatically close.

## Setting print options

Use the Print Options dialog box to design your quote proposals. Each of the sections contains options that you can select before viewing the proposal.

1. Select a quote and click **Print**.
2. Select your print options. Default print options are set by quote/order print preview preferences in the Admin System.
3. If the multi-currency preference setting is enabled, then specify this information:

   **Currency Code**
   Shows the Reporting Currency value from the quote's **Header** tab.

   **Exchange Rate**

   Shows the exchange rate between Dealer Currency/Reporting Currency from the quote's **Header** tab.

   **Display Culture**
   Specify a culture from the option list. Cultures that have been disabled in the database are not displayed.

# Setting proposal preferences

After you create a quote or an order, you can create a proposal to send to the customer.

To set your defaults for your quote/order print preview:

1 Select **User button > My Company Profile > Preferences**.
2 Select the **Quote/Order Print Preview** tab.
3 Select your preferences from these options:

| Name | Description |
|---|---|
| Options View | Level of detail that is displayed for configuration options |
| Options Style | Style used to display configuration options |
| Margin for Tabular Style | The margin, in pixels, between configuration options and values, when rendered in tabular style |
| Option-Value Separator | Character that is used to separate option value pairs in the paragraph style |
| Show Acceptance Sign off | Default for the acceptance sign-off block |
| Show Expiration Date | Default for the quote expiration date |
| Show Freight Terms | Default freight terms |
| Show Order Comments | Default for the quote/order comments |
| Show Payment Terms | Default payment terms |
| Show Quote Name | Default for the quote name |
| Detail Information | Default for the quote/order details |
| Logo | File name of the logo that is used on the PDF bids. Default image path from your PCM instance: SalesPortal\Client\Themes\Default\Images\ |
| Display | Default display mode for images |
| Size | Default size of the line item images |
| Line Header | Show or hide the header for the line items |
| Show Watermark | Displays a background watermark image |
| Display | Values displayed in the price/cost column |
| Show Tax, S&H, Other Charges | Show or hide taxes, shipping & handling and other charges |

# Changing proposal pricing views

Select different price options on the Print Options dialog to change the prices that display on your proposal. The **Pricing** tab on the Quote dialog generates these prices.

1 On the Quote dialog, click **Print**.
2 Select the desired pricing display option from the Prices section.

   Pricing menu options and descriptions.

| Prices Menu Option | Description |
|---|---|
| Cost | Shows your cost (manufacturers' price with your manufacturer discount) in the quote Subtotal at the bottom of the quote proposal page. |
| MSRP | Shows the MSRP (does not include your manufacturer's discount) in the quote subtotal at the bottom of the quote proposal page. |
| List | Shows the list price of the items. |
| Selling (Line Level) | Line pricing matches selling price as displayed on the Price Adjustments dialog. Applies your manufacturer's discount, my upcharge, and additional discount. |
| Selling (Order Level) | Shows the total discount for your customer on the additional discount line on the bottom of the quote (not line by line). |
| Selling (Totals Only) | Displays totals at the bottom of the quote. Total prices reflect tax, additional charges, and S&H. There is no line pricing with this option. |

# Formatting requirements for PDF files

When you print a proposal, the print output directs to an Adobe Portable Document File (PDF). Your browser's default PDF Reader is used to display the PDF.

# Personalizing Sales Portal

6

Sales Portal can be personalized to fit your specific needs.

## Understanding user and company profiles

Your user and company profiles are set up for you by the manufacturer when they install the system.

You can change your default business terms at any time. If you change your system defaults, then it affects all new quotes that you create in Sales Portal.

### Creating a profile

1. Select **Account Information** > **My Profile**.
2. Specify this information in the My Profile section:

   **User ID**
   Specify the user ID to use to sign in to Sales Portal.

   **Windows User ID**

   Optionally, you can choose to bypass the standard Sales Portal log in page with a Windows User ID in 'domain\user name' format. To access Sales Portal using windows authentication, navigate to the Client Windows Authentication virtual directory you specified during installation.

   Examples:

   Forms authentication example URL: `http://localhost/SalesPortal81/Login.aspx`

   Windows authentication example URL: `http://localhost/SalesPortal81WinAuth`

3. Specify this information in the Application Settings section:

   **Mobile Configuration Profile**
   Mobile browsing may cause reduced real estate and scrolling issues atypical to desktop browsing. Use a mobile configuration profile to optimize the configuration experience for users with mobile

browsers. Sales Portal will automatically detect mobile browsers and select the user's mobile configuration profile.

**Note:** You must enter a valid profile in this text box. If you do not plan on utilizing this option, then use your default configuration profile name.

**Default Landing Page**
Specify which page you are directed to after log in.

**Language**
Specify which language displays to the user. The option list displays all enabled languages in the Sales Portal database.

**Manage Dealer**
This check box shows your Manage Dealer status. Profiles with the Manage Dealer status act as dealer administrators and can modify representative settings through the company profile. See "Creating a company profile" on page 40 for more information. Profiles with the Manage Dealer Settings can also modify the Enabled in All Locations setting on a Customer.

## Creating a company profile

- Preferences : Edit dealer-level preferences. See Changing preferences for more information.
- Application Settings : Edit dealer-level application settings. See Adding Application settings for more information.
- Manage Locations: Manage each location for the dealership, filtered by representative. This option only shows if location security is enabled and you have Manage Dealer privileges. See Managing locations for more information.

1. Select **Account Information** > **My Company Profile**.
2. Specify this information in the My Company Profile section:

   **Enable Location Security/Direct Sales Model**
   You can only modify these options if there are no representatives or locations associated with the dealer.

   **Mfg Base Currency**
   Set the mfg base currency on the Preferences **Application** tab in the Admin System. The option list shows all enabled currencies in the Channel sales database's Currencies table.

   **Dealer Currency**
   Specify the default currency for the dealer. It is also shown in the **Header** tab of a quote or order. This option is available for users with the Multi-currency preference enabled.

   **Exchange Rate**
   Specify the exchange rate between the Mfg Base Currency and the Dealer Currency. This option is available for users with the Multi-currency preference enabled. If you manipulate the exchange rate here (on the dealer level), then it represents a manufacturer (Mfg Base Currency) to dealer (Dealer Currency) relationship. This exchange rate is used to calculate the prices of items in the Quote Lines section of a quote.

**3** Review the information in these tabs:

**Locations tab**
Shows the different locations entered for the dealer in the Admin System.

**Order Placement Terms tab**

View manufacturer-to-dealer pricing terms, business terms set by the manufacturer in the Admin System, and shipping terms. This is the default for all quotes and orders.

**Default Terms tab**

Specify your dealer-to-customer pricing terms, business terms, and shipping terms.

**Note:** The changes you make to the default terms only affects your system defaults for items such as upcharge, discount, and tax. These discounts display on the **Default Terms** tab when you create a new customer. When you create a new quote, these defaults also display on the **Pricing** tab. You can change these defaults for each individual customer or quote at any time, without affecting your system defaults. All of these changes reflect on the **Items** tab when you create a quote and the pricing calculates.

**Representatives tab**

Add as many new representatives as your remaining licenses allow. You must have Manage Dealer privileges to add representatives.

# Managing locations

The Manage Locations dialog is only available with location security enabled. There are three levels of location management:

- If you select **Manage Locations** from the My Profile dialog, then the locations are restricted to each location which the logged-in user has access.
- If you select **Manage Locations** from the My Company Profile dialog, then you have dealer-level location access that is filtered by representative. This option is only available to users with Manage Dealer privileges.
- On the Customer Information page there is a Enable in All Locations checkbox that will specify if the Customer will be enabled in all current and future locations. This option is only available to user with Manage Dealer privileges.

# Changing preferences

The Preferences dialog, available to users with administrative Manage Dealer privileges, allows you to personalize the Sales Portal application. Set values for these preferences to reflect your working style. The preferences you set are the defaults used in the application.

1 Select **Users > My Company Profile > Preferences**.
2 Select a category tab.
3 Update your preferences.
Available preferences in the Admin System and their descriptions.

| Name | Description |
|---|---|
| Discount Mode | Allows you to the set how the discount is calculated. |
| Display Mode | Sets the default display for discounts and markups on the **Pricing** tab and print view. |
| ShowAddDiscount | Displays the discount to your customer on the **Pricing** tab and print view. |
| ShowCost | Displays the cost on the **Pricing** tab and print view. |
| ShowDiscount | Displays your discount from the manufacturer on the **Pricing** tab and print view. |
| ShowList | Displays the list price on the **Pricing** tab and print view. |
| ShowSelling | Displays the selling price on the**Pricing** tab and print view. |
| ShowSubTot | Displays the subtotal on the **Pricing** tab and print view. |
| ShowUnit | Displays the unit number on the **Pricing** tab and print view. |
| ShowUpcharge | 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. |

Available Customer Dialog preferences in the Admin System and their descriptions.

| Name | Description |
|---|---|
| Default Country Code | The default country to display when specifying an address. |

Available My Items preferences in the Admin System and their descriptions.

| Name | Description |
|---|---|
| Expires in (days from today) | Used to determine the default expiration date for My Items. |

Available Quote/Order Maintenance preferences in the Admin System and their descriptions.

| Name | Description |
|---|---|
| Default Tab | Default tab to display when creating new quotes or orders. |
| Options Format | The formatter to use for summary details. |
| Validate Configurations on Bill-to/Ship-to change | Set configured lines to validate if the bill-to or ship-to address is changed. |

Available Quote/Order Print Preview preferences in the Admin System and their descriptions.

| Name | Description |
|---|---|
| Display (Images) | Default display mode for images. |
| Display (Pricing) | Values displayed in the price/cost column. |
| Line Header | Show or hide the header for the line items. |
| Logo | The relative path to the logo used on the PDF bids. |
| Margin for Tabular Style | The margin, in pixels, between configuration options and values when rendered in the tabular style. |
| Option Separator | Character that will be used to separate options and their values in the paragraph style. |
| Options Style | Style used to display configuration options. |
| Options View | Level of detail to be displayed for configuration options. |
| Show Acceptance Signoff | Default for the acceptance sign-off block. |
| Show Expiration Date | Default for the Quote expiration date |
| Show Freight Terms | Default freight terms. |
| Show Order Comments | Default for the quote/order comments |
| Show Payment Terms | Default payment terms. |
| Show Quote Name | Default for the Quote name. |
| Show Tax, S&H, Other Charges | Show or hide taxes, shipping & handling and other charges. |
| Show Watermark | Display a background watermark image. |
| Size | Default size of the line item images. |

# Viewing Application settings

Use the Application Settings dialog box , available to users with Manage Dealer privileges, to view payment and shipping-related terms and policies. The records on the various tabs are values that are either pre-defined or user-defined. Pre-defined values can be disabled but not deleted.

## Adding Application settings

1. Select **Users > My Company Profile > Application Settings**.
2. Select a category tab.
3. Click **New**.
4. Specify your application information.
5. Select the Enabled check box.
6. Click **OK**.

## Default application settings

Pre-defined payment types that are available through application settings.

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

Pre-defined payment terms that are available through application settings.

| 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. |

Pre-defined shipping policies that are available through application settings.

| Name | Description |
|---|---|
| No Preference | The order is treated as any normal order in the system. |

| Name | Description |
|---|---|
| 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 back ordered 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 may incur additional shipping costs. |

Pre-defined freight terms that are available through application settings.

| 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 | Warehouse Dock. |
| 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 |

Pre-defined freight carriers that are available through application settings.

| Name | Description |
|---|---|
| ABF Shipping | This is the preferred freight carrier selection. Along with freight carriers, freight method options are also located in this category. |
| FedEx | This is the preferred freight carrier selection. Along with freight carriers, freight method options are also located in this category. |
| Pilot Air Freight | This is the preferred freight carrier selection. Along with freight carriers, freight method options are also located in this category. |
| Town Air Freight | This is the preferred freight carrier selection. Along with freight carriers, freight method options are also located in this category. |
| TST Overland Express | This is the preferred freight carrier selection. Along with freight carriers, freight method options are also located in this category. |

| Name | Description |
|---|---|
| United Parcel Service | This is the preferred freight carrier selection. Along with freight carriers, freight method options are also located in this category. |
| Yellow Freight | This is the preferred freight carrier selection. Along with freight carriers, freight method options are also located in this category. |

**Shipping Methods**

The shipping method is the type of shipping requested, such as **Next Day Air**, **Ground Freight**, or **Second Day**.

The shipping methods grid filters by the freight carrier you select from the option list. After selecting a carrier, only the shipping methods specific to that carrier show in the shipping method grid. Extensive shipping methods are available throughout the list of carriers.

# Enabling Sales Portal tracing

If you choose to enable tracing for Sales Portal, then it will affect system performance and usage. It is not recommended to keep tracing enabled for a prolonged period of time in a production environment. Monitor and clear this file regularly.

1. Open `TracingTools.exe` from `C:\inetpub\wwwroot\<PCM Instance>\Sales Portal\Utilities\`.
2. Select **Enable Tracing**.
3. Click **Apply**. An iisreset is performed on the server, which will end your session.
4. Click **OK**.
5. Open `C:\inetpub\wwwroot\<PCM Instance>\Sales Portal\Client\trace.txt` to view the trace file.