Infor ERP XA

CRM/Customer Center Administration Guide

Publication Information

The product Infor ERP XA was previously know as Infor XA, MAPICS ERP for iSeries and MAPICS XA. These names may still appear in text or graphics within this book.

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Preface

About MAPICS CRM

MAPICS CRM is a Web-based customer relationship management solution for companies that need to manage their entire sales process, from customer lead origination through placing the order and servicing the customer.

This guide provides information to answer questions that may arise as you set up and administer MAPICS CRM, and integrate it with other products. Information about additional Administration functions for CRM general users is available in the *CRM User's Guide*.

The most current version of this guide (and all MAPICS documentation) is available on the MAPICS Web site at http://support.mapics.com. To access this area, you need a customer number and access code, which MAPICS provides.

About MAPICS Customer Center

MAPICS Customer Center is an online order-entry tool that allows your customers to order your products over the Web. It is a different Web site than the CRM application, although it may reside on the same servers as CRM. The same databases serve both CRM and Customer Center.

Additional Documentation

All MAPICS documentation is available for download in Adobe® Acrobat® Portable Document Format (PDF) on the Documentation pages at http://support.mapics.com.

The MAPICS Front Office product is supported by several sets of manuals, online help files, readme files, and release notes. See the *Documentation Map* (CRMDocMap.xls), which is located on each product CD for a summary of all available CRM documentation.

System Requirements and Prerequisite Knowledge

See the *MAPICS Guide to Technology* at http://support.mapics.com for the most up-to-date list of software and hardware requirements for MAPICS Supply Chain and MAPICS CRM/ Customer Center products. This document also lists typical system administration tasks you should be familiar with before attempting to install and administer MAPICS products.

Contacting MAPICS

Contacting MAPICS Support

If your contract includes support, you can contact MAPICS Support using the URL http://support.mapics.com. To access MAPICS support and documentation, you must log in and select the MAPICS area.

From the Support web page, you can search for answers to your questions about the product, report issues, or find the support contact phone number and email address for your geographical area.

Planning Your Communication

To make sure the correct analyst is assigned to your case and to expedite the resolution of your questions, please have the following information available when you call us:

- Company name and phone number
- Product version release and point release
- Platform or environment (example: Windows® 2000)
- Functional area (examples: CRM, Customer Center, etc.)
- What were you doing? (example: writing a report)
- What type of data were you accessing? (example: was it a report?)
- If you received an error message, the full message text and error number
- If you are calling back on an existing case, the Case Number.

Signing Up for Support

If you are not currently on support and would like more information on your support options, please call your Customer Account Representative. If you are not sure who your Account Representative is, contact MAPICS Customer Service.

1

Introducing MAPICS CRM

MAPICS CRM is a Web-based customer relationship management solution for companies that need to manage their entire sales process, from customer lead origination through placing the order and servicing the customer. MAPICS CRM is tightly integrated with ERP, providing a complete solution between your front and back offices.

MAPICS CRM delivers productivity gains by streamlining sales and customer service processes, decreasing the cost of sales and cost to serve, and ultimately increasing revenue.

More than ever before, today's business success hinges on providing exceptional customer service and lowering costs. Manufacturers must provide a level of service that improves customer satisfaction and increases long-term loyalty and profitability. To accomplish this goal, integrating sales and customer service, business processes, and your existing knowledge database system is required to deliver fast, accurate and consistent service, customized to your unique needs.

Improving customer satisfaction, retention and long-term profitability takes a powerful customer relationship management solution, synchronized across your entire enterprise. It takes a solution that empowers your sales channels and customer service organization, with a single integrated up-to-date view of prospect, customer, product and service information.

Marketing

MAPICS CRM provides your marketing organization with the ability to plan, execute and track all elements of a marketing campaign, including its effectiveness.

A centralized library of collateral material, letters and brochures is available to support your marketing campaigns, as well as the sales process. These features provide your sales organization with a common, single access point to the most current data, ensuring that customers consistently get the best information.

Manage the Selling Cycle

MAPICS CRM guides your sales reps in assisting prospects, from initial interest through order placement, with a Web-based solution.

Key to a successful sales organization is access to customer leads and information, as well as a tool to guide your reps through the sales process. MAPICS CRM provides an automated solution for your sales reps to receive leads, assign tasks, and establish a sales process that fits your business needs.

When presenting a proposal to a customer, your sales rep must have accurate information, whether it is order history, pricing, availability. Using MAPICS CRM, your sales rep can create an order from history, configure a solution, prepare a quote, and later review it with your customer and make changes as needed before committing it. With tight integration to pricing, availability and rules-based configurations, errors are eliminated in the order process, resulting in satisfied customers.

Order Management

MAPICS CRM also enables your sales people and customer service organization to seamlessly transfer customer/prospect information directly to sales orders, saving time by using existing customer information to build the order. This information can also be used to provide accurate pricing and inventory availability information, facilitating excellent customer communication.

Employees can access orders, enabling them to keep customers informed about the statuses of their orders, all from the same system.

MAPICS CRM integrates seamlessly with your ERP system, so everyone is working with the same data.

The ERP integration points include:

- Customer data
- Product data
- Product availability information
- Pricing data
- Order transactions
- Quote transactions
- Order, quote and RMA status

Order Configuration

MAPICS CRM with Order Configuration enables your sales reps to interactively configure complex products, eliminating product combinations and selection errors. The Order Configuration component enables your sales force and customer service staff to be more productive, while at the same time reducing errors and improving customer satisfaction.

NOTE: Order Configuration is available only when CRM is integrated with SyteLine ERP.

Customer Service

MAPICS knows that customer service does not end with the sale; it is an ongoing process. Successful companies realize the value of loyal customers, because they bring repeat business and word-of-mouth references.

To keep customers satisfied, companies need to improve customer service by providing their employees with tools to make them more effective. MAPICS CRM provides solutions to take your customer service to the next level. It provides a closed-loop, call-tracking solution with the ability to build a knowledge base. This knowledge base can assist your employees in resolving customer issues in less time, making them more productive and increasing customer satisfaction.

Customization

MAPICS CRM has been designed to allow you to customize the look and feel of your site. Refer to Chapter 15, “Customizing MAPICS Customer Center," for information on customization.

MAPICS CRM Tools

To set up and maintain MAPICS CRM, the following tool set is provided:

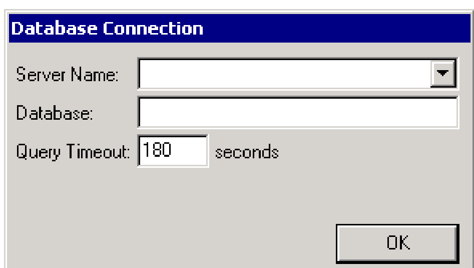
- Data Manager - This utility is the centerpiece for administering many of the security functions that control what users can do in MAPICS CRM. This utility is discussed in Chapter 3, “Data Manager."
- View Designer - With this utility you can create custom views to control what data is displayed and how it looks in MAPICS CRM. This utility is discussed in Chapter 4, “View Designer."
- Application Administration Web - Through this web-based utility you can maintain user, customer, product and order data, and define rules for MAPICS CRM. You can also use auditing tools for error recovery. This utility is discussed in Chapters 4-9.
- System Administration Web - This web-based utility determines the functionality that is available, both by environment and user, in MAPICS CRM. You can also use it to define your own values for base fields, and extend your MAPICS CRM system by defining custom fields in User Extended Tables (UETs). Add information about UET for iSeries here.This utility is discussed in Chapters 10-12.

The remainder of this chapter shows you how to log in to each of these tools.

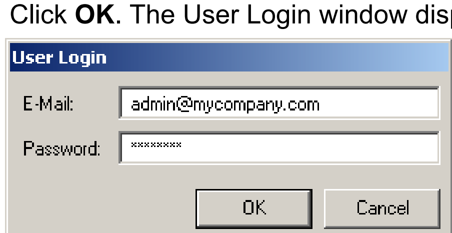
Logging in to the Data Manager

To log in to the Data Manager, follow these steps:

1. Click **Start**, and select **MAPICS>Data Manager** from the pop-up menu. The Database Connection dialog displays.



2. In the Server Name field, enter the name of your SQL Server machine.
3. In the Database field, enter the name of your CRM database.
4. In the Query Timeout field, enter the timeout duration in seconds, if necessary
5. Click **OK**. The User Login window displays.

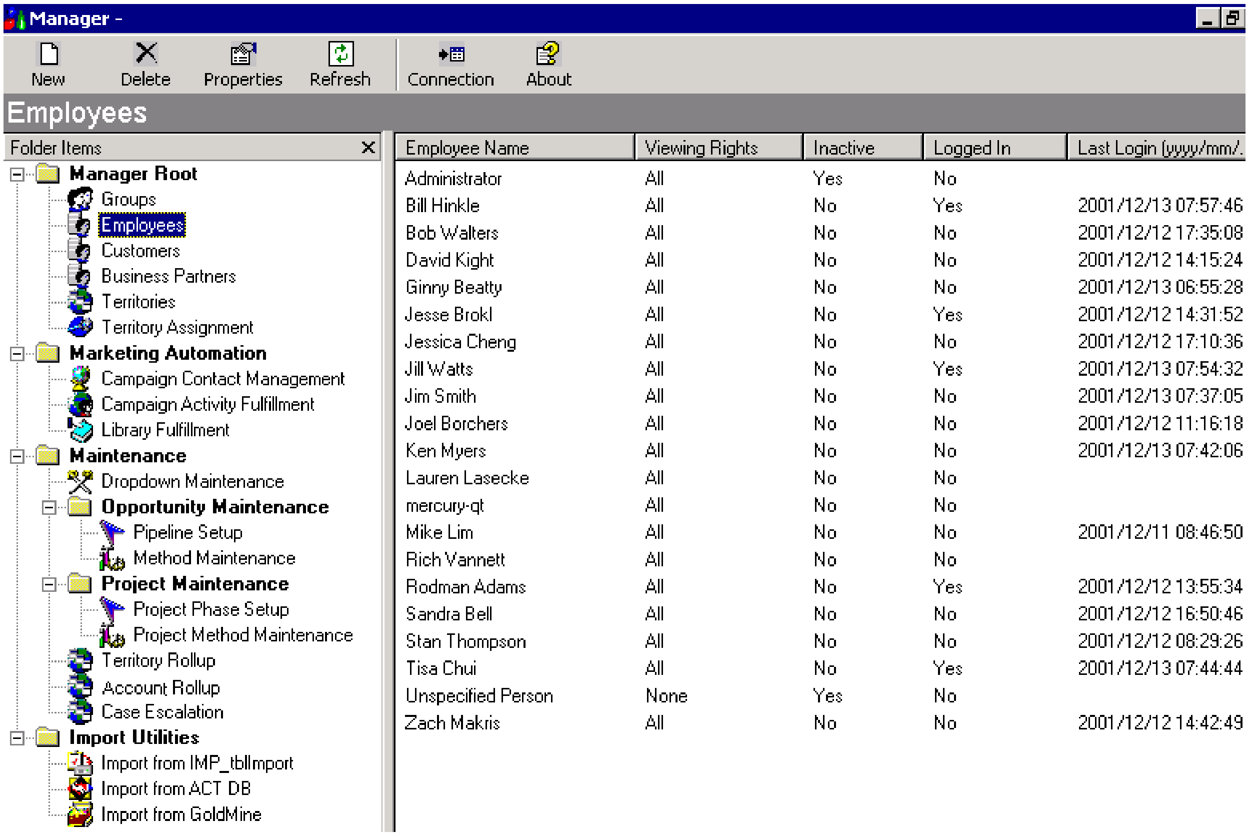


6. Enter your e-mail address and password for logging in to the Data Manager.

NOTE

The first time you start the Data Manager, you may use the settings that are shown in the above example to access the Data Manager. In the future, you should establish different employee login IDs for this area.

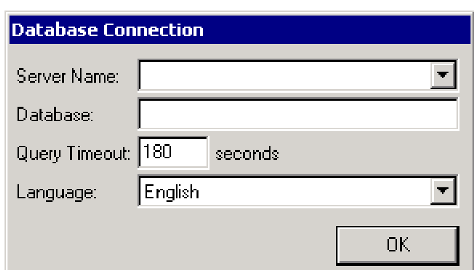
7. Click **OK**. The Data Manager main window displays.



For information about using the Data Manager, see Chapter 3, “Data Manager."

Logging in to the View Designer

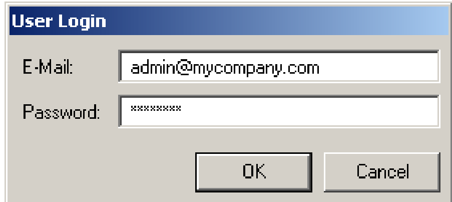
Click **Start**, and select **Programs>MAPICS>MAPICS CRM>View Designer** from the pop-up menu



To connect to your SQL Server database, follow these steps.

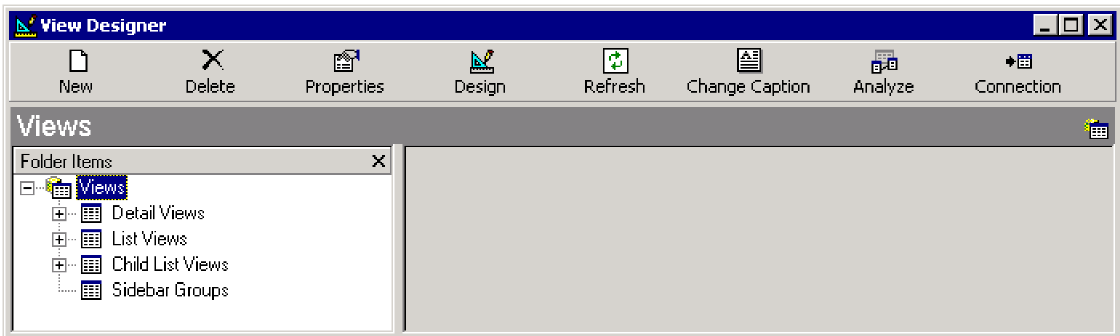
1. In the Server Name field, select the name of your SQL Server machine.
2. In the Database field, enter the name of the MAPICS CRM database.
3. Click **OK**.
4. In the Query Timeout field, enter the timeout duration in seconds, if necessary.
5. In the Language field, select the language you will be using.

6. Click **OK**. The User Login window displays.



7. Enter your e-mail address (or login ID) and password for logging in to the View Designer.

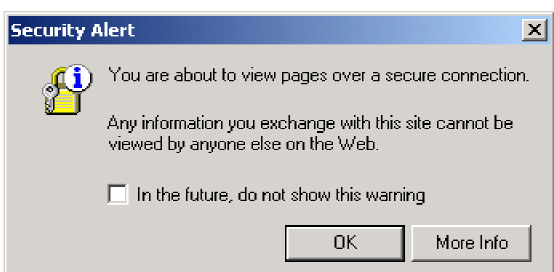
   If your connection information is correct, the View Designer main window displays.



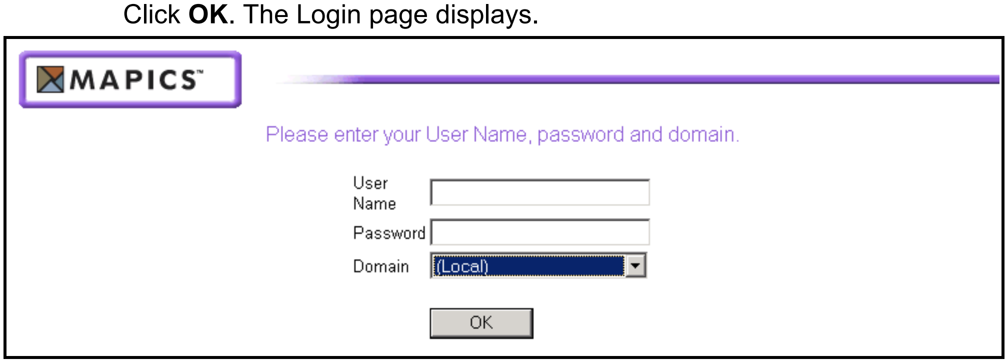
Logging in to the Administration Webs

The procedure for logging in to the Application Administration Web and the System Administration Web is the same, except for the URL you enter to access each web-based utility. Follow these steps to log in to either one:

1. Launch Microsoft Internet Explorer, and enter the URL of your Application Administration Web or your System Administration Web.
2. Because you are entering a secure area, a Security Alert message displays.



   Click **OK**. The Login page displays.



3. Fill in information in the following fields:
   - User Name - Enter your user name for logging in to the Web.

- Password - Enter your password for logging in to the Web.
- Domain - Select the domain where the Web you are logging in to is located.

4. Click **OK**.

See chapters 4-9 for information about the base functionality that is available in the Application Administration Web; see chapters 10-12 for information about the functionality that is available in the System Administration Web.

2

MAPICS Customer Center Web Site Tour

This document provides an overview of the sample MAPICS Customer Center web site, Big Sky Bikes & Supplies. It describes the various pages from the customer's point of view, but it also notes where an administrator can customize or set up certain features.

The features described here are available in the sample web site for a user assigned to the Users group (role). The actual features available may vary, depending on each user's security access rights. See the "Settings" chapter for information about user roles.

User Interface

Default UI

The default user interface is designed to get you up and running quickly with MAPICS Customer Center. The only elements you really should customize are the company logo at the top of the sample pages, and the graphic used with the logout page. You can change text on the sample web pages or the help topics as needed, using a standard HTML or text editor and modifying the XSL style sheets.

This web tour assumes that you are using the default UI. The screen shots you will see do not reflect the customizable elements described below.

Additional UI

A second user interface is available that is more similar to the UI in the previous version of MAPICS Customer Center. To use this UI instead of the default UI, you run a batch file, as documented in the *MAPICS CRM and Customer Center Installation Guide*.

Additional Customizable Elements

When setting up the Customer Center site, you can include or customize some elements by making ASP/HTML changes in the corresponding modules in the /Include directory. Customizable elements include the company logo, product search area, shopping cart preview area, and so on. See the chapter "Customizing MAPICS Customer Center," for more information.

Log In

The Login page displays when you enter the site. It asks for your user name and password, which are used to determine your customer number, currency, pricing structure, access rights, location, and so on. Administrators can modify this text.

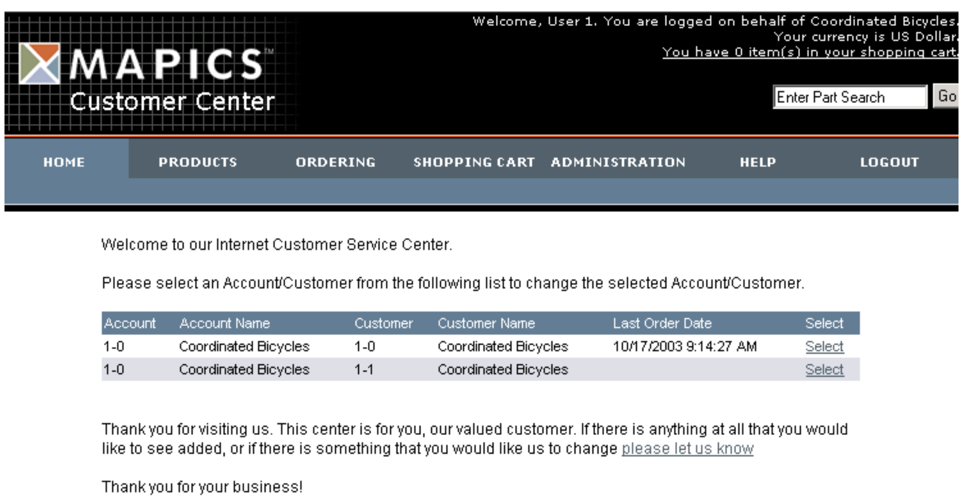
If you are using the default UI, you must log in.

If you are using the secondary UI, you can search for products and add items to your Shopping Cart without logging on; however, the prices you see will be the items' list prices and will not reflect customer-specific pricing. If you try to check out an order, you will be asked to log in first.

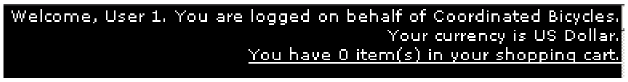
Current User

To log in, enter your user name and password, and click **Go**. If you do not remember your user ID or your password, you need to contact the site administrator and then create a new user record.

Upon successful login, the Welcome page displays.



The upper right corner of all of this site's web pages display your user ID, customer ID, currency, and the number of items currently in your shopping cart. For example:



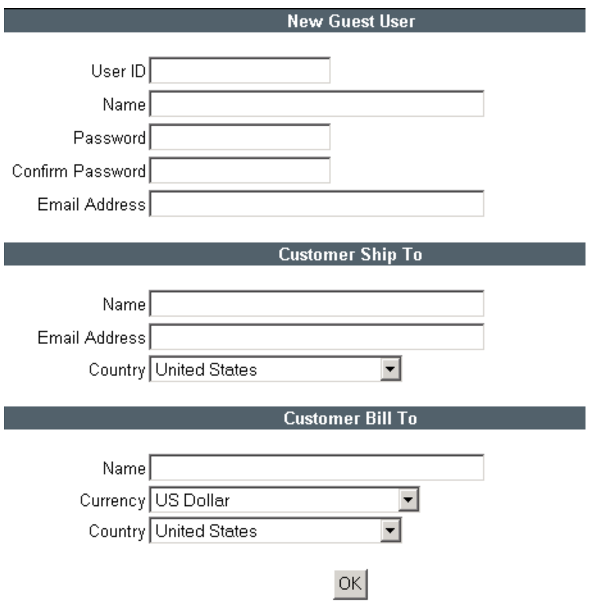
If multiple accounts or bill-to and ship-to combinations are available, you must select your account and customer name from a list of accounts that displays.

New (Guest) User

If you are new to the web site and want to log in as a guest, click the **New User?** link on the Login page.

NOTE: If MAPICS Customer Center is integrated with SyteLine ERP, the “allow new users" setting should be off, and the administrator should remove this link.

This displays a page where you can enter information to create a new guest account:



New Guest User

- User ID - Enter a unique user ID, up to 20 characters.
- Name - Enter your first and last name, up to 40 characters.
- Password - Enter a password, up to 20 characters.
- Confirm Password - Re-enter the password.
- Email Address - Enter your full e-mail address.

Customer Ship To

- Name - Enter the name of the person or company to which this order will be shipped.
- Email Address - Enter the e-mail address of the person to receive the shipment.
- Country - Select the country to which this order will be shipped.

Customer Bill To

- Name - Enter the name of the person or company to which this order will be billed.
- Currency - Enter the currency used where this order will be billed.
- Country - Select the country where the billed person or company is located.

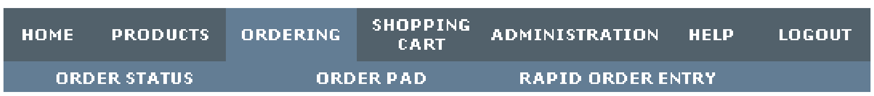
Once this information is entered, a new user bill-to and ship-to record is stored in the system.

Guest users may have limited access to web site features:

- By default, the Menu contains only the Home, Ordering, Shopping Cart, and Help options. The Ordering menu contains only the Rapid Order Entry option.
- Item pricing is based on default pricing, rather than customer-specific pricing.
- Product searches by configurable items are not available.
- Order pads are not available.

Menu

Use the menu near the top of the page to travel through the web site.



Click on the top-level links to go to an area. The second line of the menu shows the options you can choose in that area. Some options may not be available, based on your permissions (or, in the secondary UI, whether you have logged in yet).

NOTE The menu is not available on pages where navigation is disabled.

By default, the menu bar contains these options:

- **Home** - This option returns you to the Home (Welcome) page.
- **Products** - This option takes you to the Product Search page, where you can search for products by category, item, description, or manufacturer. See “Searching for Products” on page 2-6 for more information.
- **Ordering** - This menu contains some or all of these options:
  * **Order Status** opens a page where you can query orders and quotes, convert quotes to orders, and copy orders. See “Order Status Search” on page 2-17 for more information.
  * **Order Pad** displays a list of all the standard system order pads and any custom ones you have created. For information about using order pads, see “Order Pad” on page 2-15. For information about how administrators create system order pads, see “System Order Pads” on page 9-13.
  * **Rapid Order Entry** displays a page where you can quickly identify the manufacturers, part numbers and quantities of the items you want to order. See “Rapid Order Entry” on page 2-14 for more information.
- **Shopping Cart** - This menu contains these options:
  * **Shopping Cart** lets you preview the order before checking out the items and creating an actual order. See “Shopping Cart” on page 2-20 for more information.

  * **Check Out** adds the items in the shopping cart to the order, and displays a page where you can enter order details and identify the billing and shipping addresses. See “Checkout” on page 2-24 for more information.

- **Administration** - This menu may contain the following options, depending on your permissions:

  * **Customer ShipTo** displays a screen where you can update Ship-To information. See “Updating Ship-To Information” on page 2-27 for more information.

  * **Customer BillTo** displays a screen where you can update Bill-To information. See “Updating Bill-To Information” on page 2-28 for more information.

  * **Reports** displays a list of reports. Depending on the permissions the system administrator assigns to you, you may not be able to see any reports, or you may see a subset of the reports that are available. See “Viewing Reports” on page 2-29 for more information.

  * **Change Password** allows you to change your login password for the web site. See “Changing Your Password” on page 2-30 for more information.

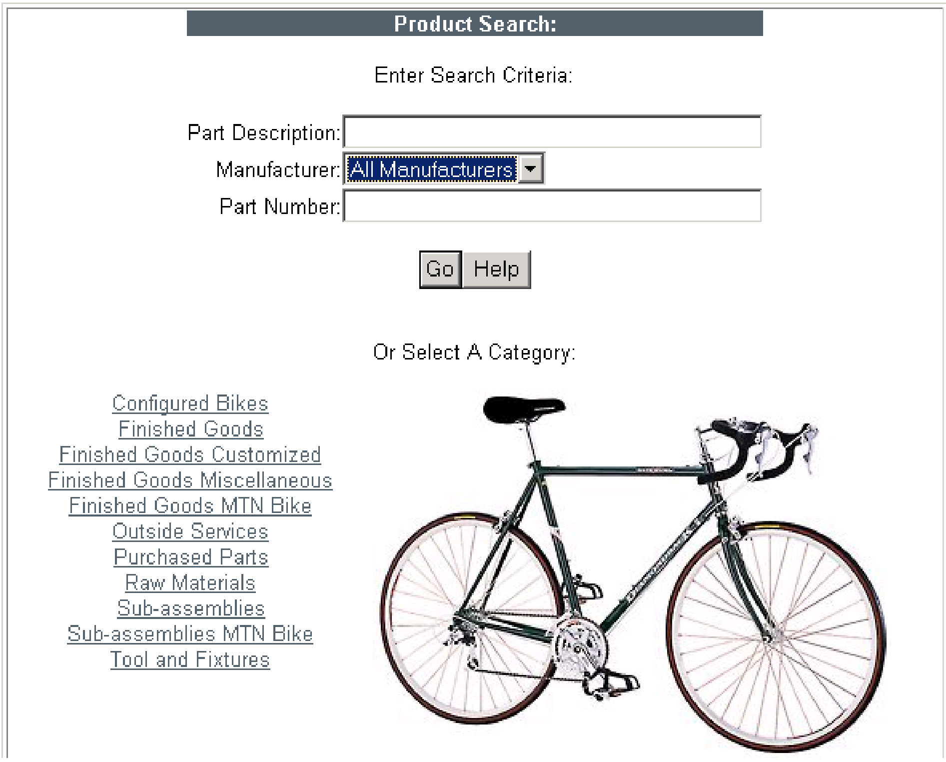
- **Help** - This link opens the web site’s help system. The help system contains overviews of each page in the web site, and provides procedures for performing typical tasks. It is HTML-based and browser-independent. Administrators can customize it, using a standard HTML editing tool, so that it accurately reflects your web site implementation. See the *CRM Technical Reference* for information about customizing the help system.

- **Logout** - Logs you out of the web site. This is recommended to ensure that no one else continues your session when you close the browser.

Products

Searching for Products

To search for a product, select **Products** from the menu. This displays the Product Search page. For example:



On this page, either select a product category or enter search criteria.

Selecting a Product Category

You can click a product category link to display the Product Search Results page, listing all the products in that category.

The categories on this page, and the products that fall under each one, are based on the structures defined in MAPICS CRM/Customer Center Administration. The pictures shown in the lower right corner can be linked to the product search categories.

Using the Product Search Area

You can search for items by part description (keyword), manufacturer or part number.

To search by **Part Description** or **Part Number**, you must know some or all of the value; leaving either field blank instructs the system to look for all values for that field. You can use wildcards in both fields:

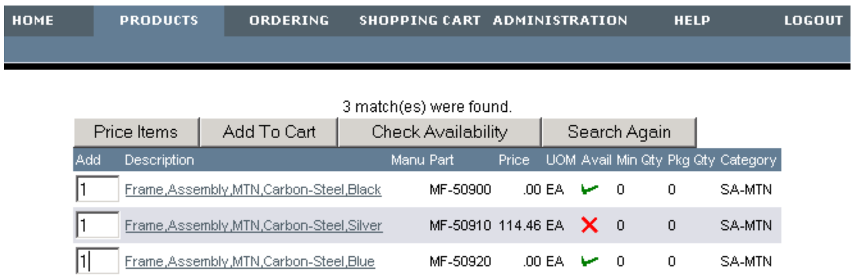
* or %	Represents multiple characters. For example, entering ***bicycle*** in the **Part Description** field returns all items with “bicycle” in their description, such as Bicycle,Customized,26” and Bicycle,Customized,27”. Entering **bicycle%mountain%** returns all items whose descriptions begin with “bicycle” and also contain “mountain”, such as **Bicycle,Model-200,Mountain,Black** and **Bicycle,Model-200,Mountain,Silver**.
? or **_**	Represents a single character; for example, entering **???27000** in the **Part Number** field will return all items whose numbers are 8 characters in length and which end in 27000, such as **BK-27000**, **PK-27000**, and **WA-27000**.

You can also select from the **Manufacturer** drop-down list. The information in this list comes from your Internet database, which you maintain through the MAPICS CRM/ Customer Center Administration tools.

To execute the search, click the **Go** button. The Product Search Results page then displays a list of all the products that matched the search criteria.

Product Search Results

The Product Search Results page displays a list of all the products that matched your selection criteria. For example:



The displayed columns include:

- Add - Enter the quantity of the product you want, and then click Add to Cart to add them to your shopping cart.
- Description - The description of the item displays. Click this link to display additional details about the product.
- Manu - The manufacturer code for the item displays.
- Part - The item's part number displays.
- Price - After you click **Price Items**, the item price displays.
- UOM - The item's unit of measure displays.
- Availability - After you click **Check Availability**, the item's availability displays (X for not available, or a check mark for available. Depending on your permission level, you may then be able to click on the X or check mark to view more information about the availability. (See "Product Availability" on page 2-9.)
- Min Qty - The item's minimum order quantity displays.
- Pkg Qty - The number of items in a package displays.
- Category - The item's category code displays.

These buttons are available on this page:

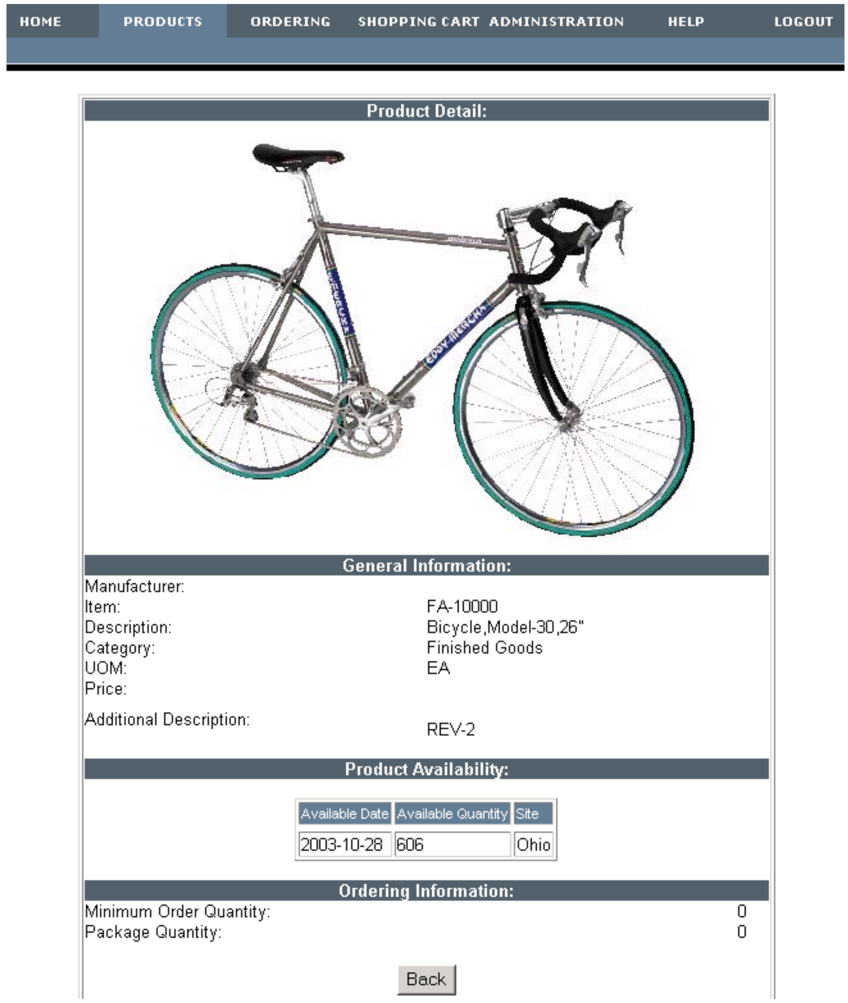
- **Price Items** prices the items on the screen and redisplays the results with the prices.
- **Add to Cart** adds the items with a quantity entered to the shopping cart.
- **Check Availability** determines the availability of the displayed products and redisplays the results with the availability icon.
- **Search Again** redisplays the Product Search page so you can perform another search.

Clicking the item description takes you to the Product Detail page. See "Viewing Additional Details about a Product" for more information.

Clicking the availability icon takes you to the Product Availability page. See "Viewing Product Availability Details" on page 2-10 for more information.

Viewing Additional Details about a Product

From the Product Search Results, Order Pad, or Shopping Cart page, click an item's Description link to display additional details about the product. The Product Detail page looks like this:



The information on this page includes:

- Product Image - If an image has been included for the product, it displays in this box; otherwise, the message "No Image Available" displays.
- General Information - The manufacturer code, item number, description, base unit of measure, and unit price of the product display.
- Additional Description - If the product has an additional description, that description displays here.
- Quantity Break Pricing - If quantity break pricing is set up for the product and account, the quantities, UOM factors and prices display here. This information is displayed only if the "Display quantity break link on additional description page" environment setting is selected in the CRM System Administration Web.
- Product Availability - If available, the item's available date and quantities, and corresponding sites display.
- Ordering Information - The product's minimum and standard order quantities display.

- User Attributes - If any user attributes (UETs) have been defined for the product, they display.

When you finish viewing the product's detail information, click **Back** to return to the page you were on.

Product Availability

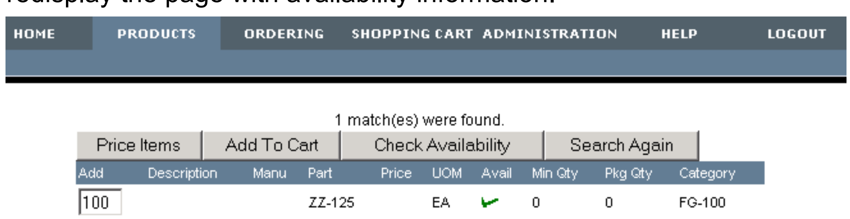
Checking Product Availability

When working with the product search area, the shopping cart, an order pad or a rapid order, you can view availability information about the displayed products.

1. Determine the availability date:
   - If you are using the Product Search area (see Searching for Products), availability is based on the current date. The availability is also based on whether the requested quantity is available. (When checking availability, a requested quantity of zero is assumed to be 1.)
   - If you are using the Shopping Cart, enter or select the Requested Ship Date. This is the date by which you want the product shipped.
   - If you are using Rapid Order Entry, enter or select the Availability Date. The availability of the product is checked later, when you add the product to the shopping cart.
2. In the Qty column, enter the requested quantity of each item. If you leave this value blank for an item, the system assumes a quantity of **1** when determining availability.

   NOTE: If you leave the availability date blank and enter a quantity of **0**, the system will use the current system date, and return only the available on-hand inventory in the results.

3. Click the **Check Availability** or **Recalculate** button (depending on the page) to redisplay the page with availability information.



When the availability calculation is complete, one of these icons displays for each product in the Availability or Available (as applicable) column:

- Green check mark ( )- The requested quantity will be available by the requested date, and can be supplied entirely by a single site.
- Yellow check mark ( ) - The requested quantity will be available by the requested date, but no single site can supply the entire quantity. It will go to the site that can fulfill the majority of the order.

NOTE: The system does not support splitting an order line between sites. When you add items to the shopping cart, you must enter one order line for each site you use to obtain the entire quantity.

- Red X ( ) - The requested quantity will not be available by the requested date.

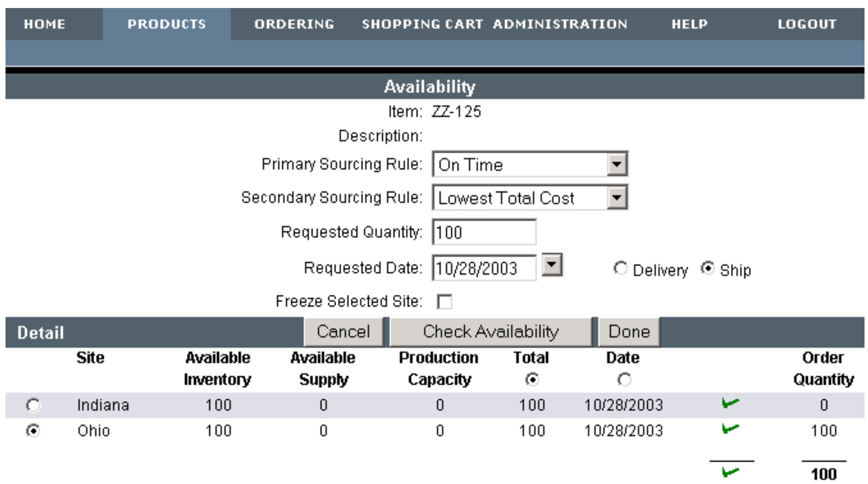
NOTE Configured items are not captured in availability calculations. If you check availability of a configured item, the system will always display a red X for it, even if the item is available.

4. Click the icon of the item whose availability you want to view. The Availability page displays.

Viewing Product Availability Details

You can view or change availability details for a particular order line in the Availability page. The site selection and sourcing options are available only you are logged in as a user with the Role setting "Allow viewing of availability and modification of sourcing." Otherwise, only the available quantity value, the part ID, and the description display. The procedures that follow assume you have view and modify rights for availability data.

To view availability details, click the green or yellow check mark or the red X symbol in the Availability column on any page where the availability symbols are displayed (for example, Shopping Cart). The Availability page displays.



NOTE The site selection and sourcing options on this page are available only if Intelligent Sourcer is installed, and are visible only if you are logged in as a user with the Role setting "Allow viewing of availability and modification of sourcing." Otherwise, only the available quantity value, the part ID, and the description display.

1. The Availability section on this page shows the primary sourcing rule and the secondary sourcing rule (the tie-breaker rule, if more than one site meets the sourcing criteria) that were used to select the supply site, and the quantity and date that were used to calculate the availability information. See “Changing Sourcing Rules” on page 2-12 for information about changing values in the Availability section.

2. To ensure that the selected site will provide the line item for the displayed order quantity, select the Freeze Selected Site check box. When you complete and commit the order, the currently displayed site will supply the line item. If you do not freeze the selected site, the sourcing selection may change, depending on the conditions at the time the order is committed.

For example, suppose the sourcing rule is On Time, and the selected site (at the time of the availability check) can deliver the item by the requested date. Before you can commit the order, however, other demands have been committed to that site for that item, and the site is no longer able to deliver the order on time. Therefore, the Sourcer selects another site to provide the line item when you commit the order. To force the currently selected site to provide the line item, you must select the Freeze Selected Site check box.

3. The Detail section lists all sites that have the product available. Review the following information:

   - Site - The option button of the site the system has chosen to provide the line item is selected. The other sites that can provide the item are also shown as option buttons. You can override the Sourcer's site selection by selecting the option button of another site. The Freeze Selected Site check box is then selected automatically to indicate that you have overridden the site selection. When you commit the order, the item and order quantity will be supplied by the site shown.
   - Available Inventory - The quantity that can be provided by on-hand inventory at each site is displayed. This quantity is currently in inventory.

     Note: The quantity values shown on this view reflect available quantities only up to the requested quantity. Additional quantities may be available.
   - Available Supply - The quantity that can be provided by planned supply (future deliveries) by the requested date is displayed.
   - Production Capacity - If the supply site uses Point Promiser, this value represents the quantity that is estimated to be available, based on the site's capacity to manufacture the item. If the site uses Capacity Promiser or APS, this value represents the quantity that is available through more complex capacity vs. demand calculations.

     Note: In certain cases, Point Promiser can return a plus (+) sign in the Production Capacity column instead of a quantity, indicating that a "infinite" available production quantity. This situation can happen if the part is defined with a per-piece lead time value of 0 in the Point Promiser database.
   - Total - The total quantity the site can provide—up to the requested quantity—is displayed. If the availability calculation was based on the requested quantity, the option button above the Total column is automatically selected as a visual indicator. Note that this option is display-only.
   - Date - The earliest date the site can provide the quantity is displayed. If the availability calculation was based on the requested date, the option button above the Date column is selected. Note that this option is display-only.

4. If necessary, you can make changes to the availability options and recalculate availability; see "Changing Sourcing Rules" on page 2-12 for details.

5. When you are finished, click **Done** to save your selections and return to the Product Catalog list view.

Changing Sourcing Rules

The site selection and sourcing options on the Availability page are available only if Intelligent Sourcer is installed, and are visible only if you are logged in as a user with the Role setting "Allow viewing of availability and modification of sourcing."

To enable the Sourcer to choose another site, according to a different sourcing rule, select the new rule in the Primary Sourcing Rule field and click **Check Availability**.

The Secondary Sourcing Rule is used only if more than one site meets the selection criteria defined by the Primary Sourcing Rule. For example, if Lowest Part Cost is the primary rule, and two sites can provide the part at the same cost, the Sourcer uses the secondary rule, which could be Fastest Ship Date. The rule values are the same as those in the Primary Selection Rule field.

Intelligent Sourcer processes the sourcing rules as follows:

- On Time - Contacts each site in order of the site's priority, and selects the first site that can meet the requested ship date or delivery date.
- Highest Priority - Selects the site with the highest priority.
- Fastest Ship Date - Selects the site that can ship the fastest.
- Fastest Delivery Date - Selects the site that can deliver the fastest. Unlike Fastest Ship, this rule considers transit time.
- Lowest Part Cost - Selects the site that has the lowest cost for the part.
- Lowest Transit Cost - Selects the site that has the lowest transit cost.
- Lowest Total Cost - Selects the site that has the lowest total cost (part cost + transit cost).

If you change the sourcing rules, you must freeze the site; otherwise, the original sourcing rule will be used when you check out an order in the shopping cart.

Basing the Request on the Date

On the Availability page, to check the maximum quantity available by the requested date:

1. In the Requested Quantity field, enter **0**.
2. In the Requested Date field, enter the date you need the item, or select the date from the calendar. Then, select either the **Ship** option if the date is a shipping date or **Delivery** if it is a delivery date.

   The Delivery option applies only if you are using Intelligent Sourcer. If you select **Delivery**, the commit process will use sourcer's Site-Customer transit time to calculate when the inventory should be decremented. If you select **Ship**, the transit time is not used.

3. Click **Check Availability**. The calculated quantity displays in the Available Inventory, Available Supply, and Production Capacity columns. In addition, the Date option button is selected to show that the calculation was based on the requested date.
4. Notice that the Order Quantity column is set to 0. Now that you know the maximum quantity that is available by the requested date, you must enter the order quantity you need in the Requested Quantity field (up to the sum of the Available Inventory, Available Supply, and Production Capacity values), and click **Check Availability** again.

5. When you are finished, click **Done** to save your selections and return to the Product Search area.

Basing the Request on the Quantity

On the Availability page, to check the earliest date that a particular quantity can be shipped:

1. In the Requested Quantity field, enter the desired quantity. The request is always based on the quantity, unless the quantity is zero.
2. Click **Check Availability**. The calculated availability date displays in the Requested Date field, and the Total option button is selected to show that the calculation was based on the requested quantity.
3. When you are finished, click **Done** to save your selections and return to the Product Search area.

Ordering

Once you determine the product you want, you can order it using any of the following methods (some may not be available, based on the permissions you have been assigned):

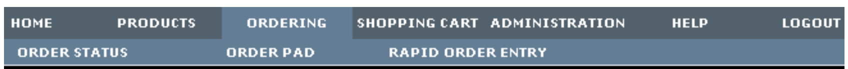
- Adding the product to the Shopping Cart from the Product Search Results page
- Rapid Order Entry
- Order Pad

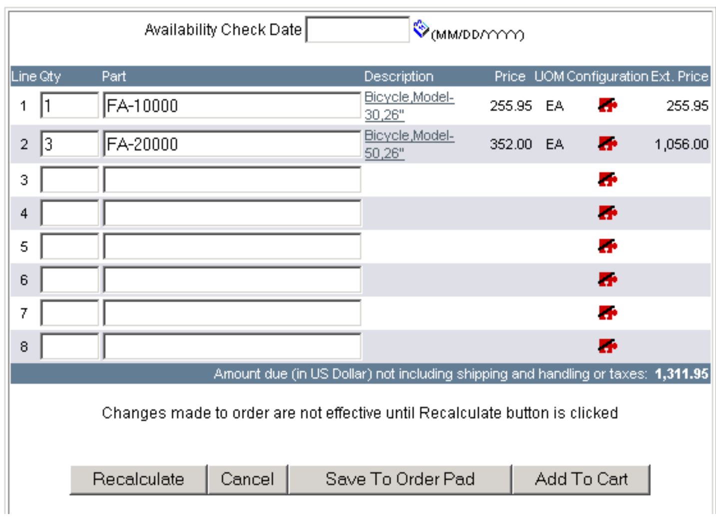
After you place an order, you can check the status of the order by using the Order Status Search page.

Rapid Order Entry

If you already know the quantities and item numbers of the products you want to order, you can use rapid order entry to quickly enter the order, rather than searching for the product catalog first.

To access the Rapid Order Entry page, select **Ordering>Rapid Order Entry** from the menu.





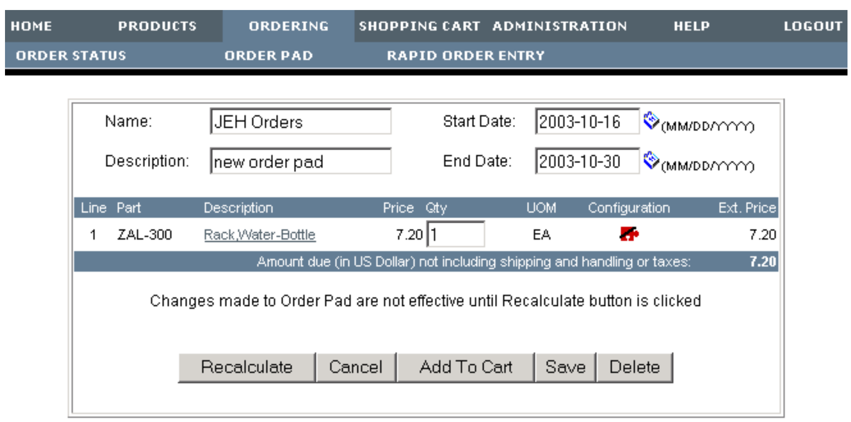
1. Fill in information in the following fields:
   - Availability Check Date - If you need the items in the order to be shipped by a particular date, enter that date (or select it from the calendar) to check whether the items will be available.
   - Qty - Enter the quantity of the product you are ordering.
   - Item - Enter the item number of the product you are ordering.
2. Click **Recalculate** to update the view with each product's description, availability, unit of measure, price, extended price, and configuration information.
3. After you have added lines to the rapid order, you can do the following:
   - Get product details - Click on the item description to view additional details.
   - View a product's availability and optionally select its supply site - See "Checking Product Availability" on page 2-9 and "Viewing Product Availability Details" on page 2-10.

- Recalculate totals - Change the quantity of one or more lines and click **Recalculate**.
- Purchase items - Set the quantities, click **Recalculate**, and then click **Add to Cart** to open the Shopping Cart page, including the items and quantities you specified here.
- Reset quantities - To reset the quantities to their original (default) values, click **Cancel**.
- Delete line items from the order pad - To remove individual items, change each one's quantity to 0 and click **Recalculate**.
- Configure a product - See "Configuring a Product" on page 2-21.
- Add the items to an order pad - See "Creating and Adding Items to An Order Pad" on page 2-15.

Order Pad

Order pads consist of items that customers order frequently. You can create your own order pad. Select **Order>Order Pad** from the menu to display the Order Pad Selection page.

Then click on an order pad link to open the Order Pad page. If you have not created your own order pad, click on the **Demo** order pad to see what it looks like.



An order pad automatically expires when its end date is older than the current system date.

Creating and Adding Items to An Order Pad

To create an order pad or add line items to an existing order pad:

1. In either the Rapid Order Entry page or the Shopping Cart, enter the part numbers and quantities of the items you want.
2. Click **Save to Order Pad**. The Order Pad Selection page displays.

3. Click on an order pad link. That order pad opens.

   If you have not yet set up a custom order pad, or you want to create a new one, click NEW. Then change the name and customize the order pad as described in “Customizing the Order Pad” on page 2-16.

4. The lines are copied to the bottom of the order pad, and the Qty column contains the quantities you assigned to them. You can change these quantities, if necessary.
5. Click **Save** to save the order pad.

Customizing the Order Pad

You can customize the following areas of the order pad:

- Name - Enter a name for your order pad. The default name of the order pad is THIS ONE. Change it to a unique name. We recommend that you use a name that helps identify what the order pad contains or how frequently you place the order.
- Description - Enter a description for your order pad.
- Start Date - Enter the start of the date range during which the order pad is effective. Initially, this field is set to today’s date, but you can enter a different date or click the Calendar icon to select a date.
- End Date - Enter the end of the date range during which the order pad is effective. Initially, this field is set to today’s date, but you can enter a different date or click the Calendar icon to select a date. If you do not want the order pad to expire, clear this field.
- Line - Most of the information on the line is read-only, but you can specify a quantity. Clicking on the item description displays the Product Additional Description page for the selected product (see “Viewing Additional Details about a Product” on page 2-8).

Using the Order Pad

Once you have your order pad set up the way you want it, you can use it to do the following:

- Add line items to the order pad. See “Creating and Adding Items to An Order Pad” on page 2-15.
- Save the order pad - Click **Save** to save the custom pad as it currently looks, so you can reuse it later.
- Get product details - Click on the item description to view additional details.
- Recalculate totals - Change the quantity of one or more lines and click **Recalculate**.
- Purchase items - Set the quantities, click **Recalculate**, and then click **Add to Cart** to open the Shopping Cart page, including the items and quantities you specified here.
- Reset quantities - To reset the quantities to their original (default) values, click **Cancel**.
- Delete line items from the order pad - To remove individual items, change each one’s quantity to 0 and click **Recalculate**.
- Delete the order pad - Click **Delete** to remove the custom order pad.

Copying an Existing Order or Quote

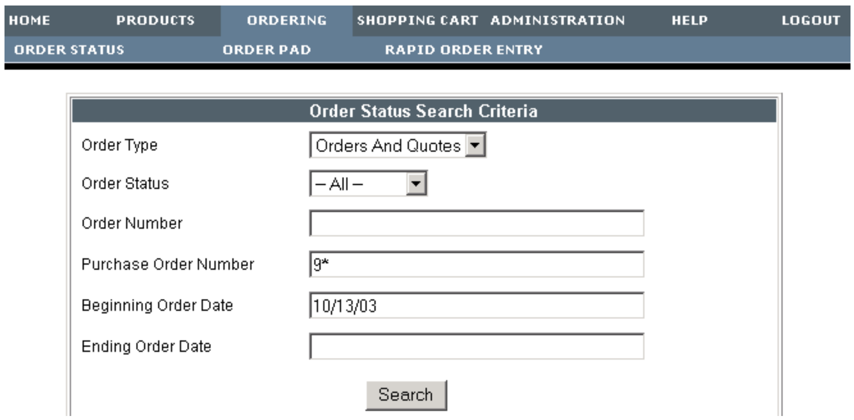
If you have an existing order or quote that you want to duplicate as a new order:

1. Go to the Order Status Search page (select **Ordering>Order Status**).
2. Enter search criteria to find the order you want to copy, and click **Search.**
3. From the Order Status Search Results, select the order you want to copy.

4. Use the **Add to Cart** option from this page to add all items that are associated with the order in the current shopping cart.
5. Go to the Shopping Cart to complete the order.

Order Status Search

When you select **Ordering** from the menu (or **Order Status** from the submenu), the Order Status Search Criteria page displays. To find the status of a specific existing order, use these search fields:



- Order Type - Select only orders, only quotes, or all (both orders and quotes).
- Order Status - Select the order processing status (Filled, Shipped, Complete, etc.) from the drop-down list. To find all order with any status, select **All**.
- Order Number - Select a particular order/quote number.
- Purchase Order Number - Select a particular purchase order number.
- Order Date Range - Select dates. The orders that will display were requested to be shipped between those dates.

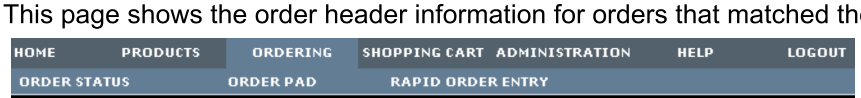
You can use wildcards in the fields:

* or %	Represents multiple characters. For example, entering **8*** in the **Order Number** field returns all orders whose numbers begin with "8". Entering **A%1** returns all orders whose numbers begin with "A" and end with "1", such as **ABC001**, **AZ999**, and so on.
? or **_**	Represents a single character. For example, entering **A??????** in the **Purchase Order Number** field returns all orders whose purchase order number begins with "A" and contains 7 characters, such as **ABC1234** or **A999999**.

To start the search, click **Search**. The results display in the Order Status Search Results page.

Order Status Search Results

This page shows the order header information for orders that matched the search criteria.



5 match(es) were found.

Order Number	Order Type	Order Date	PO Number	Status	Sales Total
112	Order	10/13/2002	QW-098012	Complete	97,000.00
123	Order	10/30/2002	9533001	Ordered	95,664.00
CC00000101	Order	10/16/2003	9000019	Processing	1.20
CC00000103	Order	10/17/2003	99999	Processing	519.10
CC00000104	Order	10/17/2003	PO987654321	Processing	255.95

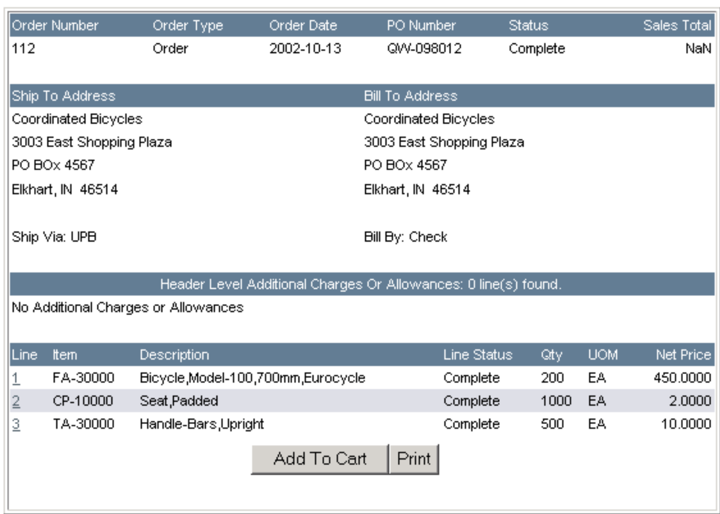
The information displayed includes:

- Order Number
- Order Type
- Order Date
- Purchase Order Number
- Order Status
- Order Total

To get details of an order, click on the Order Number link. The Order Status Detail Results page displays.

Order Status Detail Results

When you select an order from the Order Status Search Results page, a detailed display of that order will be displayed.



Order Number	Order Type	Order Date	PO Number	Status	Sales Total
112	Order	2002-10-13	QW-098012	Complete	NaN

Ship To Address	Bill To Address
Coordinated Bicycles	Coordinated Bicycles
3003 East Shopping Plaza	3003 East Shopping Plaza
PO BOx 4567	PO BOx 4567
Elkhart, IN 46514	Elkhart, IN 46514
Ship Via: UPB	Bill By: Check

Header Level Additional Charges Or Allowances: 0 line(s) found.
No Additional Charges or Allowances

Line	Item	Description	Line Status	Qty	UOM	Net Price
1	FA-30000	Bicycle,Model-100,700mm,Eurocycle	Complete	200	EA	450.0000
2	CP-10000	Seat,Padded	Complete	1000	EA	2.0000
3	TA-30000	Handle-Bars,Upright	Complete	500	EA	10.0000

Add To Cart | Print

The order detail consists of the following information:

- Order header information (order number, order type, order date, purchase order number, status, sales order total)
- Ship To address
- Bill To address
- Header notes
- Header level additional charges or allowances
- Line detail (line number, item, description, line status, quantity, unit of measure, net price)

Clicking on an order line number displays the Order Status Detail Line page.

Use the **Add to Cart** option from this page to add all items that are associated with the order in the current shopping cart. This allows you to duplicate this order as a new order.

Order Status Detail Line

When you select an order line from the Order Status Detail Results page, the Order Status Detail Line page displays details associated with the selected order line.

Line	Item	Description	Line Status	Qty	UOM	Net Price
1	FA-30000	Bicycle,Model-100,700mm,Eurocycle	Complete	200	EA	450.0000

Line Level Additional Charges Or Allowances: 0 line(s) found.
No Additional Charges or Allowances

Shipping Lines: 2 line(s) found.				
Ship Date	Ship Quantity	UOM	Carrier	Tracking ID
2002-10-09	100	EA	UPB	
2002-10-26	187	EA	UPB	

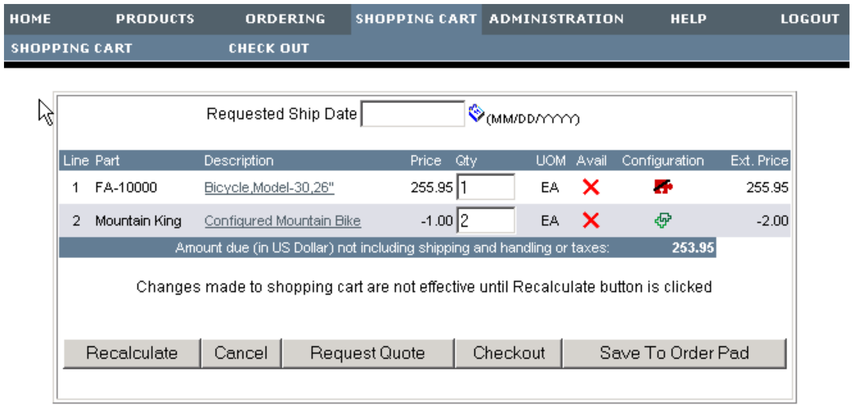
The following order line details are displayed:

- Line detail (line number, item, description, line status, quantity, unit of measure, net price)
- Line level additional charges or allowances
- Shipping lines information (ship date, ship quantity, unit of measure, carrier, and tracking ID).

Shopping Cart

After you have finished adding items to the shopping cart, select **Shopping Cart** from the menu to complete your order's processing.

At the top of the Shopping Cart page, specify the requested shipping date for the items. In the lower part of the page, the list of items that have been added to the shopping cart are displayed.



While working with the shopping cart, you can do the following:

- Get product details - Click on the item description to view additional details.
- Recalculate totals - Change the quantity of one or more lines and click **Recalculate**.
- Check each product's availability - See "Checking Availability in the Shopping Cart" on page 2-20.
- Clear products from the shopping cart - To remove individual items, change each one's quantity to 0 and click **Recalculate**.
- Configure a product - See "Configuring a Product" on page 2-21.
- Request a quote on the items - See "Requesting a Quote" on page 2-24.
- Check out - See "Checkout" on page 2-24.
- Add the items to a new or existing order pad - See "Creating and Adding Items to An Order Pad" on page 2-15.

Checking Availability in the Shopping Cart

It is important that you check availability before you check out and commit your order. This ensures that the items are still available. Other orders for the same item may have been committed between the time you initially checked availability and the time you commit the order.

1. After adding the items to the Shopping Cart, click the **Shopping Cart** button to review your order. The Shopping Cart page displays.
2. Select the Requested Ship Date (the date by which you want the order shipped). This date does not override any requested dates you established when checking an item's availability. Leave this field blank to use the current system date as the default.
3. If you need to change the order quantity for any line items, enter the new quantities in the Qty column.
4. Click **Recalculate** to recalculate the availability of each line item, using any updated quantity values and the Requested Ship Date.

5. If the items are still available, click **Checkout** to complete the order. If an item is shown as not available, you can choose an optional item, if applicable, or try reducing the requested quantity or entering a later requested ship date.

Configuring a Product

The Order Configuration component enables you to configure products to your specific requirements. For example, when ordering a bicycle, you might be able to select from a variety of handlebars, frame sizes, colors, and so on.

NOTE

Order Configuration is available only when CRM is integrated with SyteLine ERP.

If the Order Configuration component is installed, the Shopping Cart and Order Pad pages will include a Configure column, which will contain one of these icons for each configurable item in the list:

- - The item is configurable, but you have not yet selected its configuration options. You must select its configuration options before you can request a quote for it or add it to an order.
- - The item is configurable, and you have already selected its configuration options. You can request a quote for the item or add it to an order.
- - The item is not configurable.

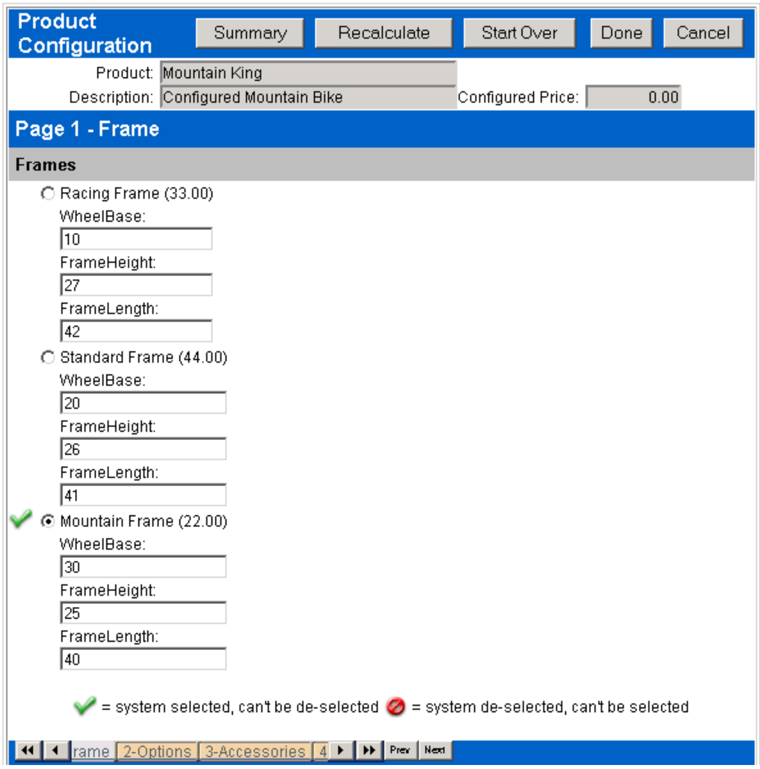
To configure an item, click on the configuration icon. The Product Configuration Page displays, where you can select the configuration options.

When you finish configuring the product, click **Done** to return to the order pad or shopping cart. The configuration icon changes to to indicate that the product has been configured and you can continue with the order entry.

Product Configuration Page

Order Configuration is available only when CRM is integrated with SyteLine ERP.

The Product Configuration page displays when you click on the configuration icon for a line in the Order Pad or Shopping Cart. As you configure the product, a running total of the price displays in the Configured Price field.



Depending on how the configuration model was designed, you may have to go through multiple pages in order to completely configure a product. Some options may already be selected, based on how the rules were set up in the configuration model.

These buttons are available on the Product Configuration page:

Button/Link	Description
Summary	Displays a summary of the configured product so far. Users can display the summary at any time while configuring a part.
Recalculate	Refreshes the configuration display.
Start Over	Clears the current configuration choices so that the user can start over with an empty configuration.
Done	Saves the configuration, and returns to the order pad or shopping cart.
Cancel	Returns to the order pad or shopping cart without saving the configuration choices.
Next	(At bottom of page) Displays the next page in the utility. Users can display the next page without completing all selections on the previous page. Before the configured product is added to a shopping cart or order pad, the user will be prompted to return to any incomplete pages that contain required parts.

Previous	(At bottom of page) Returns the user to the previous page in the utility; if this button is clicked on the first page, any configuration choices are canceled, and the user is returned to the Order Pad or Shopping Cart page.

Part Selection Icons

These icons indicate parts that you cannot select or clear, because of rules written into the configuration model:

Icon	Description
	This part is preselected for you. In some cases, you can modify the part's attributes.
	This part cannot be selected for this product, generally because you already selected another part that conflicts with it. For example, if you select a water bottle attachment, you cannot select an air pump attachment, because they use the same slot on the bike.

Configuration Summary

To view a summary of the configuration, click **Summary**. The following page displays:

PartID	Name	Description	Qty	Price	Ext. Price
MF-50900	Mountain Frame	Frame, Mountain, Carbon-Steel	1	300.00	300.00
PT-40000	Silver	Paint, Silver	1	0.00	0.00
MW-61500	Off Road	Wheel, Assembly, Mountain	2	125.00	250.00
RS-10000	Thin Racing Seat	Seat, Assembly, Racing	1	75.00	75.00
TA-31000	Racing Bars	Handle-Bars,Racing	1	30.00	30.00
FL-10000	Flag	Flag, Red-White-Blue	1	5.00	5.00
ZAL-300	Water Bottle	Rack, Water-Bottle	1	5.00	5.00
RF-10000	Reflectors - Rear	Reflectors, Rear	1	5.00	5.00
RF-20000	Reflectors - Front	Reflectors, Front	1	5.00	5.00
MW-61500	Off Road		1	125.00	125.00

Total: 800.00

Pricing of Configured Products

Generally, when a configured product is added to an order pad or the shopping cart, the system prices it based on the price data from the configuration model; however, if component prices are not set up this way in MAPICS Order Configuration, the system returns a price of zero.

Occasionally, an estimated price may be returned; in such instances, the price may be recalculated after the order is committed. MAPICS CRM then displays the price of the configured product only on the order confirmation it sends to the customer.

Updating a Configured Product

Before requesting a quote or checking out the shopping cart, you can still change your configuration selections by clicking for the applicable line. The Product Configuration Page displays with the selected options, so you can update them.

To change an option on a selection, just make another selection. However, if the option is a drop-down list box, change the option to **NO SELECTION** and click **Recalculate**. The original options now display in the list box, and you can select a new option.

You can also change the quantity of the configured product in the Qty field of the shopping cart or order pad.

Requesting a Quote

Rather than placing an order for the items in the cart, you can request a quote on them instead. Before the quote expires, you will be able to convert it to an order, based on the quoted prices.

1. In the Shopping Cart view, make sure that you have entered the correct quantities and available dates for the products you want to request a quote for. Also, make sure that you have configured any configurable products (if applicable).
2. Click **Request Quote** and continue through the Checkout process. The process appears to be the same for an order or a quote, but the order type is "quote" and no order is actually committed.

Creating an Order from a Quote

If a quote has not yet expired, you can create an order from it. The quoted prices will be used for the items, rather than their current prices.

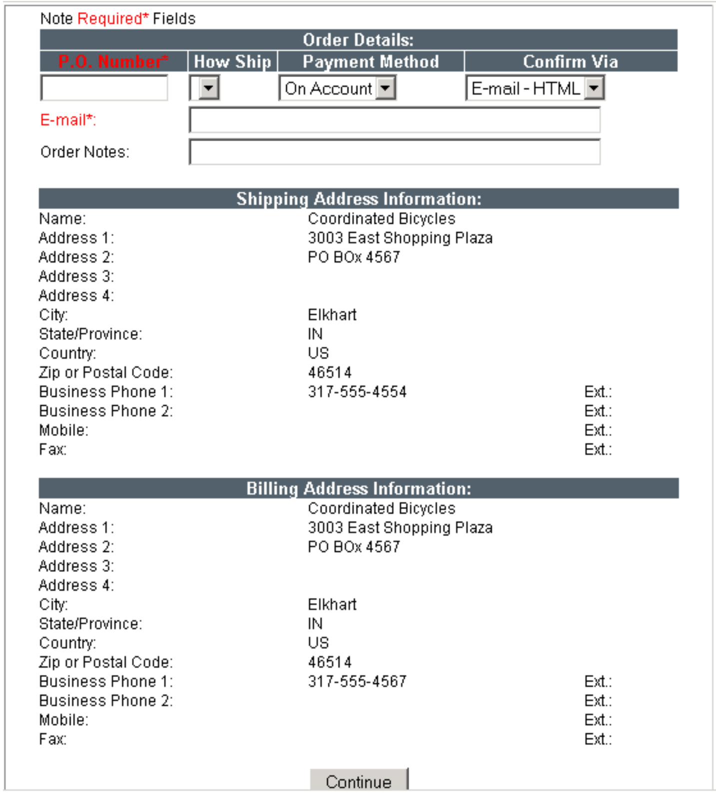
1. Select **Ordering>Order Status**.
2. In the Order Status Search page, select Order Type **Quotes** and then any other specifications to limit the search.
3. Click **Search** to display a list of quotes that match the search criteria.
4. Click on the link for the quote.
5. In the Order Status Detail Results page, click **Add to Cart**.
6. Go to the Shopping Cart and check the quantities of the items, and make any necessary changes. If you do not want to order one of the items from the quote, change its quantity to 0.
7. If necessary, check the availability of the items you added to the cart; see “Checking Availability in the Shopping Cart” on page 2-20.
8. Click **Checkout** to continue processing the order.

Checkout

You can check out by clicking on any of the following:

- **Check Out** menu option
- **Checkout** button on the Shopping Cart
- **Request Quote** button on the Shopping Cart. The pages that display for a quote are very similar to those shown for an order, except the order type is "Quote."

The Checkout page displays. Fields displayed in red with an asterisk (*) are required.



Note Required* Fields

Order Details:			
P.O. Number*	How Ship	Payment Method	Confirm Via
		On Account	E-mail - HTML

E-mail*:

Order Notes:

Shipping Address Information:		
Name:	Coordinated Bicycles	
Address 1:	3003 East Shopping Plaza	
Address 2:	PO BOx 4567	
Address 3:		
Address 4:		
City:	Elkhart	
State/Province:	IN	
Country:	US	
Zip or Postal Code:	46514	
Business Phone 1:	317-555-4554	Ext.:
Business Phone 2:		Ext.:
Mobile:		Ext.:
Fax:		Ext.:

Billing Address Information:		
Name:	Coordinated Bicycles	
Address 1:	3003 East Shopping Plaza	
Address 2:	PO BOx 4567	
Address 3:		
Address 4:		
City:	Elkhart	
State/Province:	IN	
Country:	US	
Zip or Postal Code:	46514	
Business Phone 1:	317-555-4567	Ext.:
Business Phone 2:		Ext.:
Mobile:		Ext.:
Fax:		Ext.:

Continue

On the Checkout page, fill in this information:

Order Details:

- PO Number - Enter your company's purchase order number for this purchase.
- How Ship - Initially, this field is set to the customer's default shipping code. You can select a different shipping method from the list of those available to the customer's account.
- Payment Method - Initially, this field is set to the customer's default payment code. You can select a different payment method from the list of those available to the customer's account.
- Confirm Via - Select the format of the acknowledgement: **E-mail - HTML** to send it as an HTML attachment to an e-mail, or **E-mail - Word** to send it as a Microsoft Word attachment to an e-mail.
- E-mail Address - Enter the e-mail address to which the order acknowledgement should be sent.
- Order Notes - If you want to enter notes about this order, such as special handling instructions, enter the text of the note here.

Shipping Address Information:

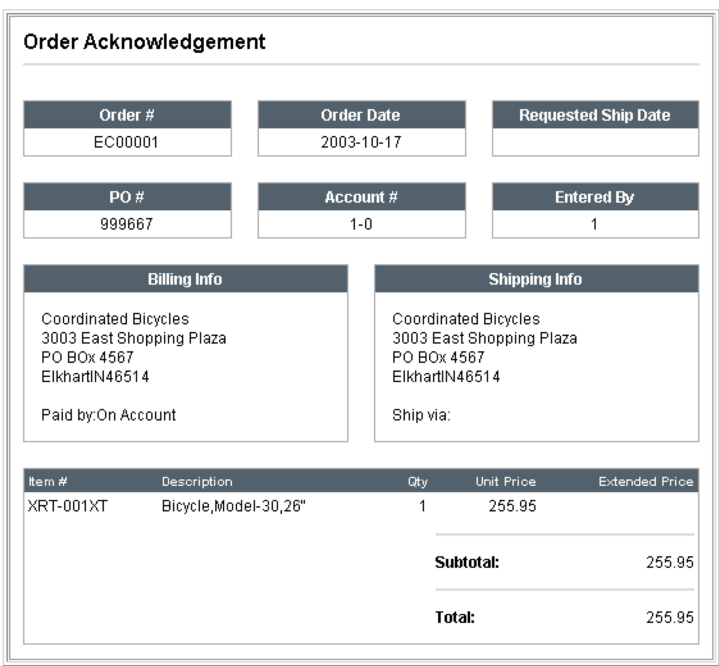
- Name - Enter your name at this shipping location.
- Address 1 - Address 4 - Enter up to four lines for the shipping address. The first line is required.
- City - Enter the city of the shipping address.

- State/Province - Select the state or province of the shipping address.
- Country - Select the country of the shipping address.
- ZIP or Postal Code - Enter the ZIP or postal code of the shipping address.
- Business Phone 1/Ext - Enter your primary business phone number and extension at this address. This number is required.
- Business Phone 2/Ext - Enter your secondary business phone number and extension at this address.
- Mobile/Ext - Enter your mobile or cell phone number and extension.
- Fax/Ext - Enter your fax number and extension at this address.

Billing Address Information:

- Name - Enter the person’s name at this billing location.
- Address 1 - Address 4 - Enter up to four lines for the billing address.
- City - Enter the city of the billing address.
- State/Province - Select the state or province of the billing address.
- Country - Select the country of the billing address.
- Postal Code - Enter the ZIP or postal code of the billing address.
- Business Phone 1/Ext - Enter the primary business phone number and extension at this address.
- Business Phone 2/Ext - Enter the secondary business phone number and extension at this address.
- Mobile/Ext - Enter your mobile or cell phone number and extension.
- Fax/Ext - Enter your fax number and extension at this address.

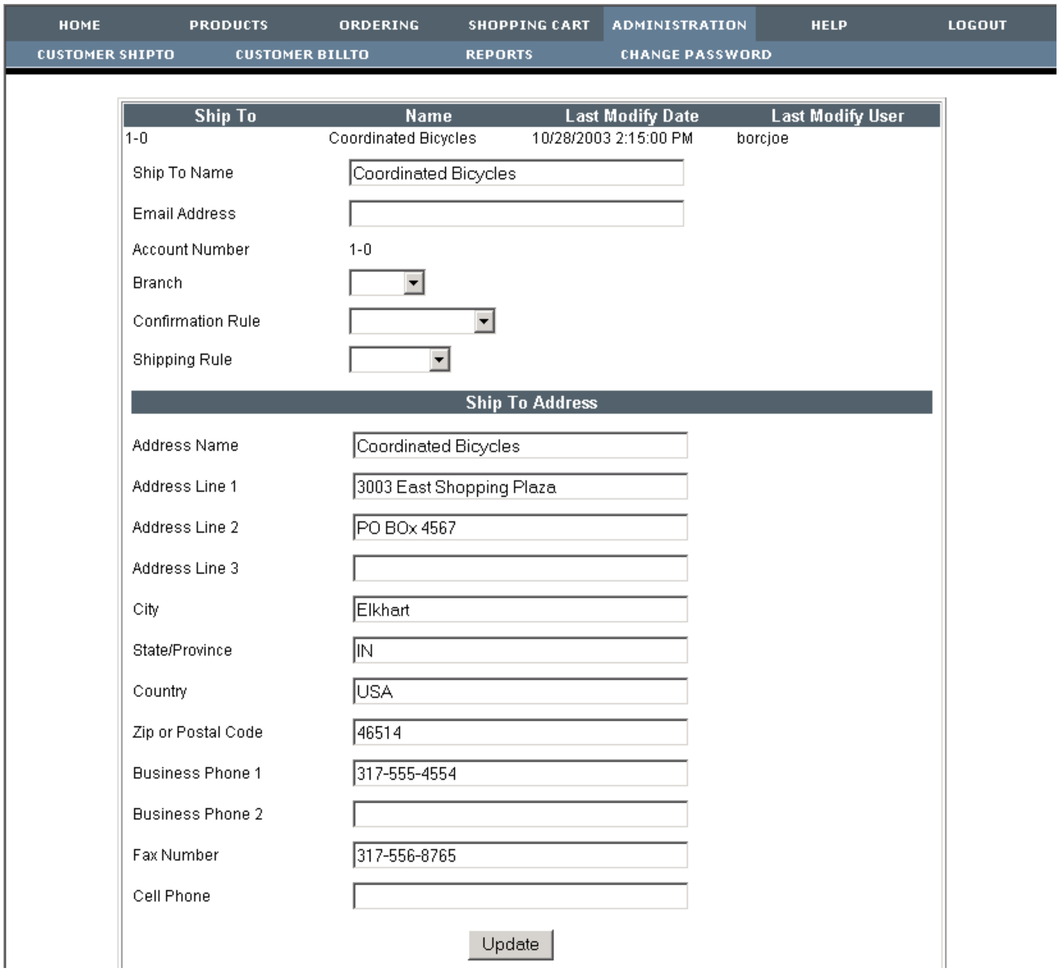
When the information is complete, click **Continue**. After the order is verified and processed, the Shopping Cart is cleared and the page displays a summary of the order.



Administration

Updating Ship-To Information

To update a customer's Ship-To information, select **Administration>Customer ShipTo**. The Customer ShipTo page displays. You may access and update this page only if your permissions allow it.


HOME | PRODUCTS | ORDERING | SHOPPING CART | ADMINISTRATION | HELP | LOGOUT
CUSTOMER SHIPTO | CUSTOMER BILLTO | REPORTS | CHANGE PASSWORD

Ship To	Name	Last Modify Date	Last Modify User
1-0	Coordinated Bicycles	10/28/2003 2:15:00 PM	borcjoe

Ship To Name: Coordinated Bicycles
Email Address:
Account Number: 1-0
Branch:
Confirmation Rule:
Shipping Rule:

Ship To Address

Address Name: Coordinated Bicycles
Address Line 1: 3003 East Shopping Plaza
Address Line 2: PO BOx 4567
Address Line 3:
City: Elkhart
State/Province: IN
Country: USA
Zip or Postal Code: 46514
Business Phone 1: 317-555-4554
Business Phone 2:
Fax Number: 317-556-8765
Cell Phone:

Update

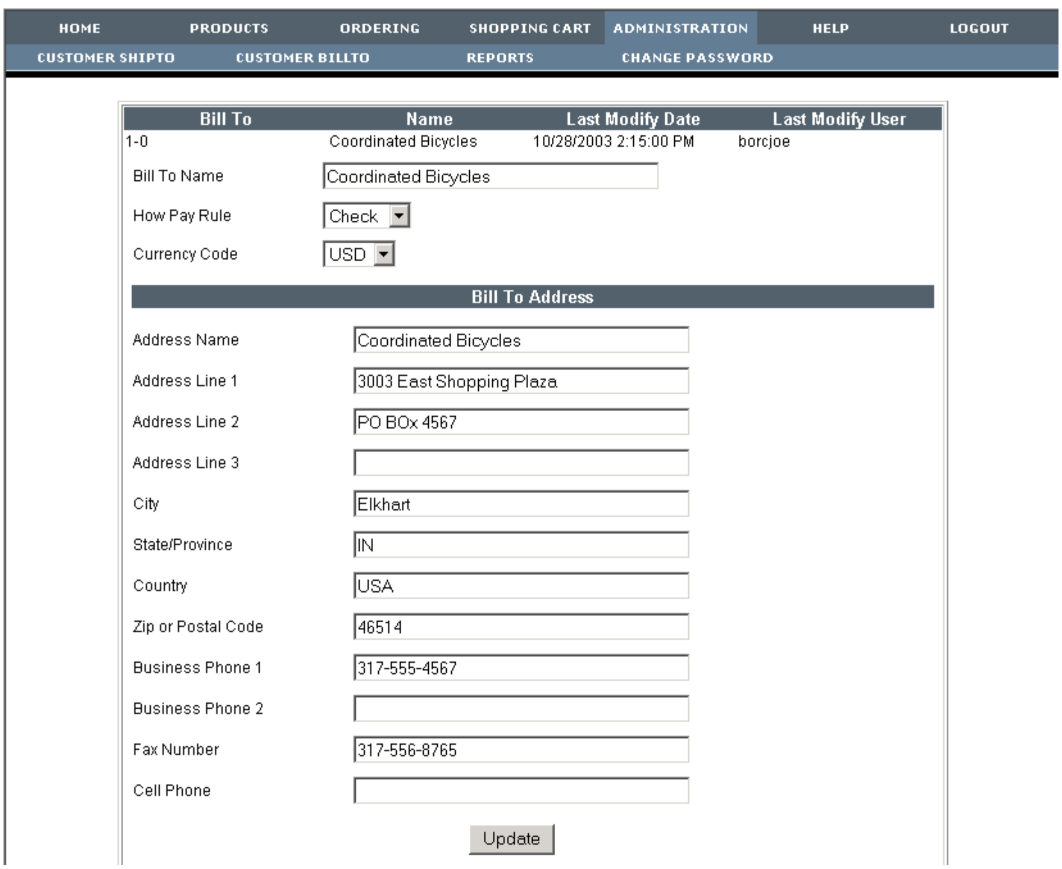
The top of the page indicates the account number, name, the last time the record was modified, and who modified it. Change the information as needed and click **Update**.

- Ship To Name - Name of the Company where the order will be shipped.
- Email Address - Assigns the associated account's login ID for the MAPICS Customer Center web site (only for customers you want to be able to log in to the web site).
- Account Number - Number of the account.
- Branch - Determines the associated account's main supply site.
- Confirmation Rule - Select the rule that will determine which methods can be used to deliver order confirmations to the associated account.
- Shipping Rule - Select the rule that will determine which methods can be used to ship the associated account's orders.
- Address Name - Enter the customer's name at this shipping location.

- Address 1 - Address 4 - Enter up to four lines for the shipping address. The first line is required.
- City - Enter the city of the shipping address.
- State/Province - Select the state or province of the shipping address.
- Country - Select the country of the shipping address.
- Zip or Postal Code - Enter the ZIP or postal code of the shipping address.
- Business Phone 1/Ext - Enter the primary business phone number and extension at this address. This number is required.
- Business Phone 2/Ext - Enter the secondary business phone number and extension at this address.
- Fax Number/Ext - Enter the fax number and extension at this address.
- Cell Phone/Ext - Enter the mobile or cell phone number and extension.

Updating Bill-To Information

To update a customer's Bill-To information, select **Administration>Customer BillTo**. The Customer BillTo page displays. You may access and update this page only if your permissions allow it.



The top of the page indicates the account number, name, the last time the record was modified, and who modified it. Change the information as needed and click **Update**.

- Bill To Name - Name of the company to which the order will be billed.
- How Pay Rule - Select the rule that will determine which payment methods the customer can use.

- Currency - Select the appropriate currency for the opportunity.
- Name - Enter the customer's name at this billing location.
- Address 1 - Address 4 - Enter up to four lines for the billing address. The first line is required.
- City - Enter the city of the billing address.
- State/Province - Select the state or province of the billing address.
- Country - Select the country of the billing address.
- ZIP or Postal Code - Enter the ZIP or postal code of the billing address.
- Business Phone 1/Ext - Enter the primary business phone number and extension at this address. This number is required.
- Business Phone 2/Ext - Enter the secondary business phone number and extension at this address.
- Fax/Ext - Enter the fax number and extension at this address.
- Cell Phone/Ext - Enter the mobile or cell phone number and extension.

Viewing Reports

You may access this area only if your permissions allow it.

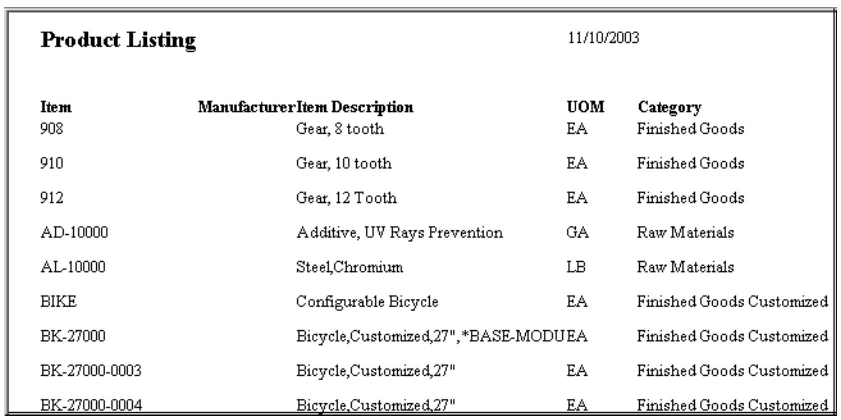
1. To display a list of available reports, select **Administration>Reports**. For example:

In a standard system, the following reports may be available. (Your system may include other reports.)

- Product Listing
- Product Quantity Price Breaks
- Alternate Items
- Interchangeable Items
- Ship To Order Summary Report
- Ship To Quotes Report

2. Click a report link to display the Report Parameters page for that report. For example:

3. Enter the parameters and click **Submit** to create and display the report. Note that this is the raw results from the Crystal Reports execution. Standard form elements are not displayed, to allow a pure "print-ready" format for the report. For example:



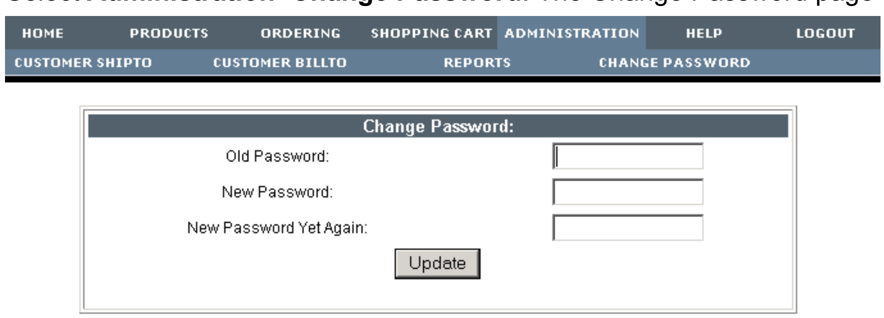
Product Listing 11/10/2003

Item	Manufacturer	Item Description	UOM	Category
908		Gear, 8 tooth	EA	Finished Goods
910		Gear, 10 tooth	EA	Finished Goods
912		Gear, 12 Tooth	EA	Finished Goods
AD-10000		Additive, UV Rays Prevention	GA	Raw Materials
AL-10000		Steel,Chromium	LB	Raw Materials
BIKE		Configurable Bicycle	EA	Finished Goods Customized
BK-27000		Bicycle,Customized,27",*BASE-MODU	EA	Finished Goods Customized
BK-27000-0003		Bicycle,Customized,27"	EA	Finished Goods Customized
BK-27000-0004		Bicycle,Customized,27"	EA	Finished Goods Customized

Changing Your Password

We recommend that you periodically change your password for security purposes.

1. Select **Administration>Change Password**. The Change Password page displays.



2. Fill in information in the following fields:
   - Old Password - Enter your current password for logging in to this web site.
   - New Password - Enter the new password you want to use to log in to this web site.
   - New Password Yet Again - Re-enter your new password exactly as you entered it in the New Password field.
3. Click **Update**.

Web Page Role Settings for Customers

A customer can access and update specific MAPICS Customer Center web pages only if the customer's role settings are set as follows in the System Administration Web:

Web Page	ASP Page	Permission
Change Password	ChangePassword	
Check Out	CheckOutDisplay	Allow Edit of Order Specific Addresses; Allow order note entry
Customer Bill-To Maintenance	BillToDisplay	Allow Navigation to Party Profile; Allow Edit of Bill To / Ship To Record?
Customer Ship-To Maintenance	ShipToDisplay	Allow Navigation to Party Profile; Allow Edit of Bill To / Ship To Record?
Order Acknowledgement	Acknowledgement	
Order Pad List	OrderPadList	
Order Pad	OrderPadDisplay	Allow Navigation to Order Pad
Order Status Detail Result	OrderStatusDetail	Allow Navigation to Order Status
Order Status Detail Line	OrderStatusDetail	Allow Navigation to Order Status
Order Status Search	OrderStatus	Allow Navigation to Order Status
Order Status Search Results	OrderStatus	Allow Navigation to Order Status
Product Configuration	ProductConfiguration Display	
Product Detail	ProductDetail	
Product Search	ProductSearch	
Product Search Results	ProductCatalogDisplay	
Rapid Order Entry	rapidorderdisplay	Allow Navigation to Rapid Order Entry
Reports	Reports	Allow Navigation to Reports
Shopping Cart	ShoppingCartDisplay	Allow Navigation to Shopping Cart; Allow Quotes (for Request Quote button)
Welcome Page	UserWelcomeScreen	Allow Users With No Xref Customers to Create Orders and Customers (for guests)

3

Data Manager

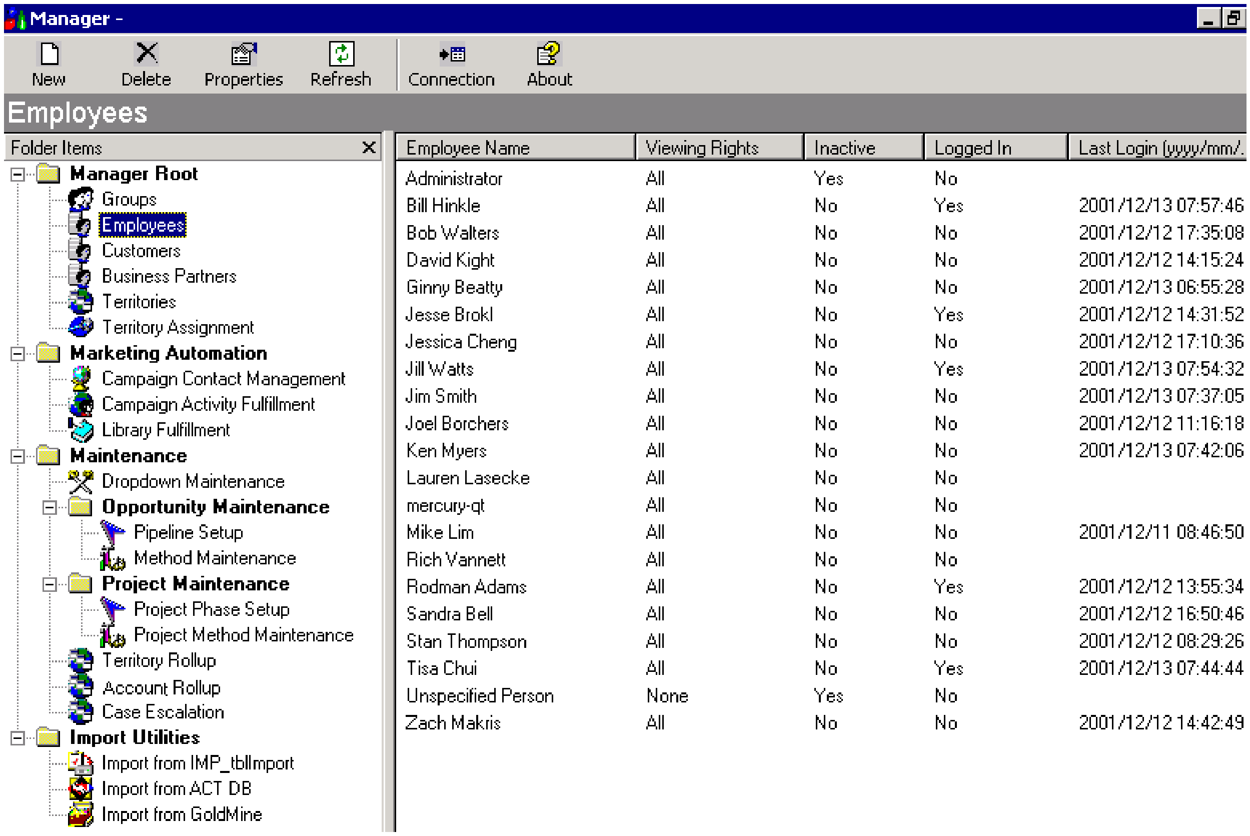
This chapter applies to MAPICS CRM only.

The Data Manager utility is the centerpiece for administering MAPICS CRM. You must perform a number of tasks in the Data Manager, before releasing MAPICS CRM to your users. This chapter discusses these tasks in the following topics:

- Administrator Settings
- Group Maintenance
- Employee Maintenance
- Customer Maintenance
- Business Partner Maintenance
- Territory Maintenance
- Territory Assignment
- Marketing Automation
- Dropdown List Maintenance
- Creating the Opportunity Pipeline
- Creating the Project Phases
- Sales Methods and Tasks
- Project Methods and Tasks
- Territory Rollup
- Account Rollup
- Case Escalation Maintenance

Data Manager Main Window

When you successfully log in to the Data Manager (see “Logging in to the Data Manager” on page 1-3), the main window displays:



The left pane contains a tree structure of all the types of records you can maintain and the tasks you can perform. When you highlight a record type in the left pane, the right pane is updated with a list of all the corresponding records.

Data Manager Toolbar

The Data Manager toolbar contains the following buttons:

Button	Description
New	Creates a record.
Delete	Deletes a record.
Properties	Displays an item’s properties, such as an employee’s information.
Refresh	Redisplays the screen, updating it with the latest information.
Connection	Displays the Database Connection dialog.
About	Displays system information about the Data Manager.

Administrator Settings

A utility is provided for setting administration options which enable the settings in the Database Connection dialog (see “Logging in to the Data Manager” on page 1-3) to be saved to the registry. This option is turned on by default when the Data Manager is installed. When logging in to the Data Manager, the security settings automatically display in the dialog so that you can access the Data Manager simply by clicking **OK**.

This utility enables you to save the View Designer utility Database Connection dialog settings to the registry, too.

NOTE Allowing this information to be saved to the registry might be a security violation for your company. You should consider if you would rather have users enter the connection settings each time they access the Data Manager.

To run the utility:

1. In Windows Explorer, open the directory **\\Program Files\Frontstep\Administrator**.
2. Double-click **fsAdminSettings.exe**. The MAPICS CRM Administrator Settings dialog displays.

3. To turn off the Save Security Settings options, clear the check boxes and click **OK**.

   The next time you access the Data Manager or the View Designer utility, the Security Setting fields will be blank and you will have to enter the connection information.

If at a later time you want to turn on these settings again, simply run this utility, select both check boxes, and click **OK**. The next time you access the Data Manager utility, you will need to enter the connection information; however, it will then be saved to the registry for future use by the Data Manager.

Group Maintenance

Groups are collections of employees who need to have access to the same areas within MAPICS CRM.

You can build your groups around any aspect of your business. We recommend that you base them on the different areas within your company that will use MAPICS CRM. For example, you might create groups for Sales, Marketing, Technical Services, Customer Service, and Management. You would then assign various views to each group, based on its unique requirements.

NOTE Further information about creating views is available in Chapter 4, “View Designer."

Three steps are involved in defining a group:

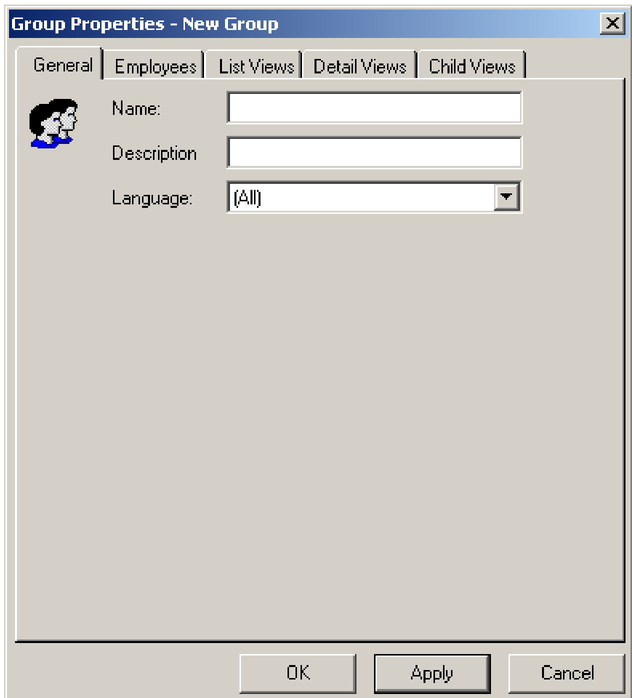
- Assigning a name, description, and default language to the group
- Assigning employees to the group

- Assigning views to the group

Once you assign employees to groups and then assign the group's views, employees that are part of the group can see the views that are assigned to the group.

Defining a Group

1. Open the Data Manager (see "Logging in to the Data Manager" on page 1-3 for instructions).
2. In the Folder Items tree view, select the **Groups** entry under the Manager Root folder. A list of all the available groups displays in the right pane.
3. Click **New**. The Group Properties dialog displays.



4. In the Name field under the General tab, enter a unique group name. We recommend that you name your groups after the different departments within your company.
5. In the Description field, enter a description of the group.
6. The Language field is set to **All**, but you can select a different language, such as **English,** if it is your regular language for conducting business.
7. Click **Apply** to save the information and leave the dialog open.

Assigning Employees to a Group

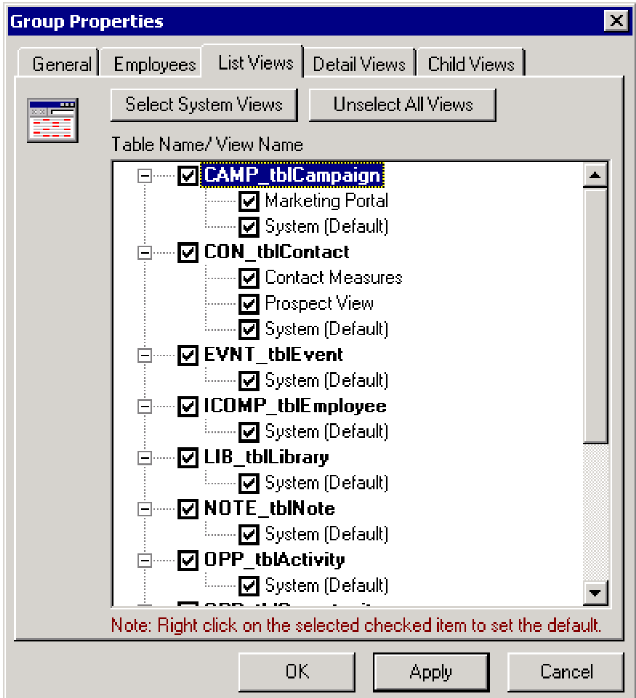
1. Click the **Employees** tab.
2. Select the check box next to each employee you want to include in this group.
3. Click **Apply** to save the information and leave the dialog open.

Assigning Views to Groups

The Groups dialog has three tabs for assigning views which correspond to the three types of views in MAPICS CRM: list, detail and child list (see "Types of Views" on page 4-2).

1. Click the tab—**List Views**, **Detail Views** or **Child Views**—of the type of views you want to assign to the group. A list of all the tables of the selected view type display.

2. Click the plus (**+**) sign next to a table to display its list of views.



3. You can do the following:
   - If you want to assign individual views to the group, select the check box next to each view name you want to assign.
   - If you want to assign all the views to the group, click **Select System Views**.
4. To select a default view of a table for the group, left-click the name of the view, and then right-click it. The value **(Default)** displays to the right of the view name.

NOTE You must select a default view for each table. If you do not assign one for a table, a message displays, informing you of which table requires one selected.

5. Click **Apply** to save the information and leave the dialog open.
6. Repeat steps 1-5 to continue assigning views under the other two tabs.
7. Click **OK** to close the dialog.

Employee Maintenance

The term "employee" equates to any user of MAPICS CRM, including internal employees, customers, and business partners. You use the Employee List in the Data Manager utility to set up and maintain information about individual users.

You cannot delete employees from the list, but you can mark them as inactive to prevent their names from showing up in ongoing activities. Inactive employee names will still be associated with their completed tasks.

Adding a New Employee

1. Open the Data Manager (see “Logging in to the Data Manager” on page 1-3 for instructions).
2. In the Folder Items tree view, select the **Employees** entry under the Manager Root folder. A list of all the available employees displays in the right pane.

3. Click **New**. The Employee Properties dialog displays.
4. Under the General tab, enter information in the following fields:
    - Name - Enter the employee's name.
    - Title - Select the employee's job title.
    - SSN - Enter the employee's Social Security number, if necessary.
    - Role - Select the employee's role, which will determine what Order Management (Commerce) functionality the employee will have access to in MAPICS CRM

    With the initial installation of Data Manager, the only role available is **Administrator**. You will have to create additional roles for your employees in the System Administration Web.

    - Street1 - Enter the first line of the employee's company address.
    - Street2 - Enter the second line of the employee's company address, if applicable.
    - City - Enter the employee's city.
    - State - Enter the employee's state
    - Zip - Enter the employee's ZIP or postal code.
    - E-mail - Enter the employee's e-mail address for logging in to MAPICS CRM.

    Some fields are required. If you forget to fill in a required field, a warning message displays, informing you about which field requires entry.

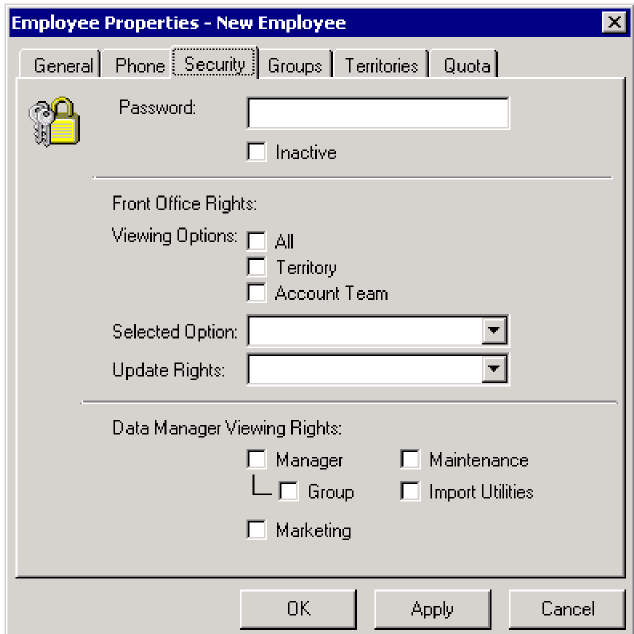
5. Click **Apply** to save your changes and leave the dialog open.

Entering Employee Phone Numbers

1. In the Employee Properties dialog, click the **Phone** tab.
2. Enter the employee's phone information.
3. Click **Apply** to save your changes and leave the dialog open.

Employee Security

Under the Security tab in the Employee Properties dialog, you can customize an employee's level of security, including password data, CRM/Customer Center rights, and Data Manager viewing rights.



You can also indicate that an employee is inactive under this tab by select the Inactive check box.

NOTE You cannot delete inactive employees from the system.

About the Employee Password

The Password field stores the password the employee uses to log in to MAPICS CRM. This field is filled when the employee enters the password through the login screen.

You can clear an employee's password under this tab, and then have the employee enter a new one the next time he or she logs in to the MAPICS CRM Web site. Or, you can assign the employee's password yourself under this tab.

Establishing MAPICS CRM Rights

Select one of the following viewing options for the employee in MAPICS CRM:

- All
- Territory
- Account Team

Employees with **All** viewing options can see all records in the database, based on the views that are assigned to their groups.

Employees with **Territory** viewing options will be restricted to accessing only those records that are in their assigned territories.

Employees with **Account Team** viewing options will be able to see only those records that are related to accounts for which they are part of the account team.

Selected Options

In the Selected Options field, you can select any of the three viewing options described in the previous topic, and defaults to the viewing option you selected.

You can give an employee any combination of the viewing option selections. When the employee is working in MAPICS CRM, he or she will control what data is viewed by choosing one of the assigned options.

Update Rights

In the Update Rights field, you can give specific rights for updating the records that an employee can view:

Rights	Description
None	Employees cannot update records, but they may be able to view them.
Territory	Employees can update records that are only in their assigned territory or territories.
All	Employees can update any record they can see.
Account Team	Employees can update any record associated with their assigned account team(s).
Account Team and Territory	Employees can update only those records that are associated with their assigned account team or their assigned territory.

Data Manager Viewing Rights

You can assign five types of viewing rights for the Data Manager: Manager, Group, Marketing, Maintenance, and Import Utilities. You can select an option to grant the employee rights to use that portion of the utility.

For employees to have rights to use the Data Manager, the utility must be installed on their computers. Data Manager rights are specific to each employee's login ID.

Assigning an Employee to a Group

You assign employees to groups under the Groups tab in the Employee Properties dialog, which determines what views they will have access to. For example, employees assigned to the Sales group will be able to see all the views to which the Sales group has been granted access.

You can assign an employee to more than one group; however, you need to assign one group as the default one—even if the employee is assigned to only one group.

To assign an employee to a group:

1. In the Employee Properties dialog, click the **Groups** tab.
2. Select a group name.
3. To assign the default group, select the group name and then right-click it.
4. Click **Apply** to save your selections and leave the dialog open.

Assigning an Employee to a Territory

You may want to assign an employee to one or more territories; follow these steps:

1. In the Employee Properties dialog, click the **Territories** tab.
2. Select each territory you want to assign to the employee.
3. Click **Apply** to save your selections and leave the dialog open.

NOTE

You can also assign employees in the Territories area. Refer to the steps in the topic, "Adding Territories" on page 3-14.

Assigning Sales Quotas to an Employee

Some employees may have sales quotas to meet throughout the year.

To assign an employee's quotas:

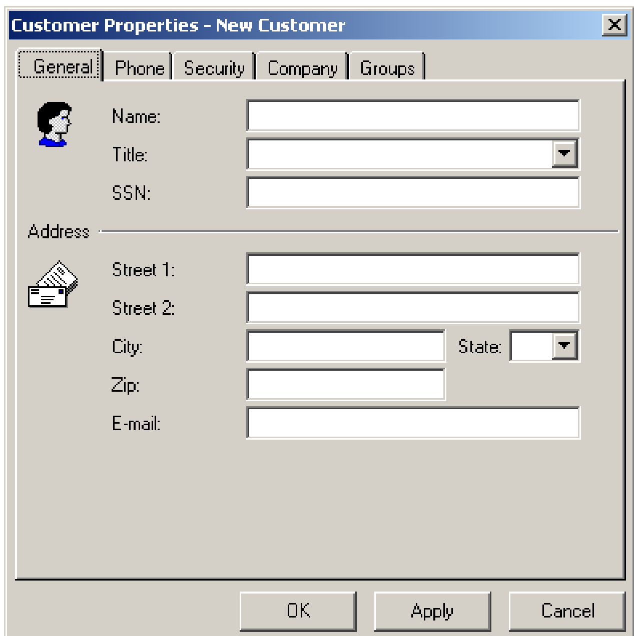
1. In the Employee Properties dialog, click the **Quota** tab.
2. In the Opportunity Goal column, enter the value for this goal.
3. In the Value Goal column, enter the value goal.
4. Click **OK** to save your entries and close the dialog.

Customer Maintenance

Creating Customer Login Profiles

You can establish login profiles for your customers to grant them access to their account-specific data in MAPICS CRM.

1. Open the Data Manager (see "Logging in to the Data Manager" on page 1-3 for instructions).
2. In the Folder Items tree view in the main window, select the **Customer** entry under the Manager Root folder.
3. Click **New**. The Customer Properties dialog displays.



4. Under the General tab, fill in information in the following fields:
   - Name - Enter the customer's name.
   - Title - Select the customer's job title, as applicable.
   - SSN - Enter the customer's Social Security number, if applicable.
   - Street1 - Enter the first line of the customer's company address.
   - Street2 - Enter the second line of the customer's company address, if necessary.
   - City - Enter the customer's city.
   - State - Enter the customer's state
   - Zip - Enter the customer's ZiP or postal code.

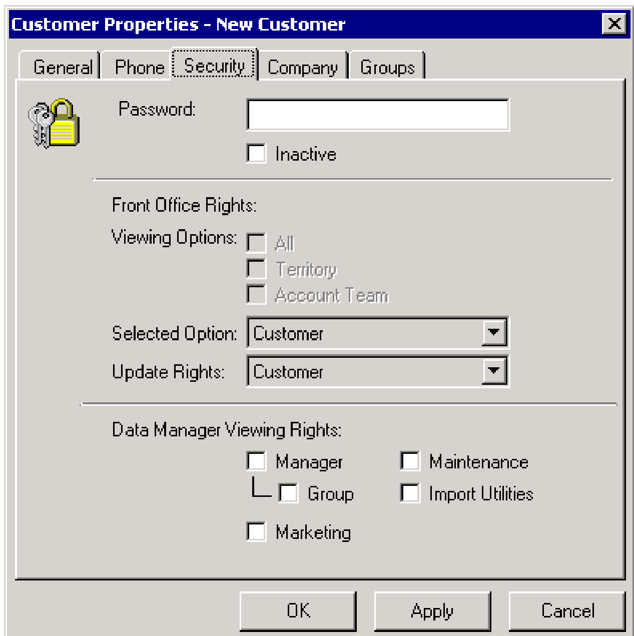
- E-mail - Enter the customer's ID for logging in to MAPICS CRM. Although you are not required to use an e-mail address, we recommend that you do so.

> NOTE: Some fields are required. If you forget to fill in a required field, a warning message displays, informing you about which field requires entry.

5. Click **Apply** to save your entries and leave the dialog open.
6. Click the **Phone** tab.
7. Enter the customer's phone information.
8. Click **Apply** to save your entries and leave the dialog open.

Establishing Customer Security

All the information that is required to set up an employee login profile is also required for a customer login profile. The difference is under the Security tab. As you can see in the following figure, all the Front Office Rights for CRM are disabled for a customer.



About the Customer Password

The Password field stores the password the customer uses to log in to MAPICS CRM. This field is filled when the customer enters the password through the login screen.

You can clear customer passwords under this tab, and then have the customers enter new ones the next time they log in to the MAPICS CRM Web site. Or, you can assign the new passwords yourself under this tab.

Data Manager Viewing Rights

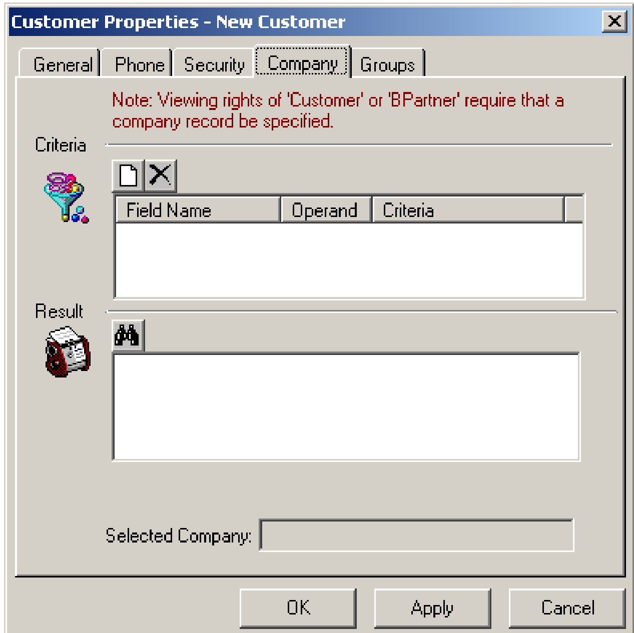
You can assign five types of viewing rights for the Data Manager: Manager, Group, Marketing, Maintenance, and Import Utilities. You can select an option to grant the customer rights to use that portion of the utility.

For customers to have rights to use the Data Manager, the utility must be installed on their computers. Data Manager rights are specific to each customer's login ID.

Assigning Customers to their Company

To provide a customer with access only to its company (and that company's related information), you need to assign the customer's account. Follow these steps:

1. In the Customer Properties dialog, click the **Company** tab.



NOTE To ensure that the customer can see only its company's data, you must assign the customer to the correct company or account.

2. Above the criteria box, click to create a search filter.
3. In the Criteria dialog, fill in the following information:
   - Field Name - Select the field name to filter on, such as **CompanyName**.
   - Operand - Select the search operand. The relevant operands display, based on the selected field.
   - Criteria - Enter or select the information you want to search for.
4. Click **OK** to save the filter.
5. Click to start the search. The results of the search display in the Result box.
6. In the Result box, select the customer's account or company record. The company name then displays in the Selected Company field at the bottom of the screen.
7. Click **Apply** to save your selection and leave the dialog open.

Assigning Customers to a Group

The groups you assign customers to determines what views those customers will have access to. For example, customers assigned to the Sales group will be able to see all the views to which the Sales group has been granted access.

You can assign a customer to more than one group; however, you need to assign one group as the default one—even if the customer is assigned to only one group.

To assign an employee to a group:

1. In the Customer Properties dialog, click the **Groups** tab.
2. Select a group name.
3. To assign the default group, select the group name and then right-click it.

4. Click **Apply** to save your selection and leave the dialog open.

Business Partner Maintenance

Creating Business Partner Login Profiles

The setup process for business partner login profiles is similar to the ones for employees and customers. All the same fields are required. The difference lies in how you assign records to a business partner login profile.

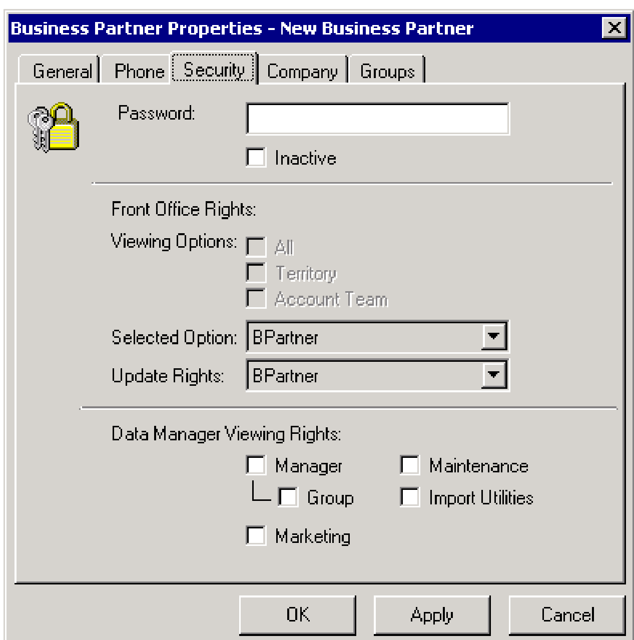
But first, you need to create the profile; follow these steps:

1. Open the Data Manager (see “Logging in to the Data Manager” on page 1-3 for instructions).
2. In the Folder Items tree view in the main window, select the **Business Partner** entry under the Manager Root folder.
3. Click **New**. The Business Partner Properties dialog displays.

   See “Creating Customer Login Profiles” on page 3-9 for instructions on adding the business partner’s login profile. Begin with 4, and replace all references to "customer" with "business partner."

Establishing Business Partner Security

All the information that is required for a customer login profile is also required for a business partner profile. As with a customer login profile, all the Front Office Rights for CRM are disabled for a business partner.



About the Business Partner Password

The Password field stores the password the business partner uses to log in to MAPICS CRM. This field is filled when the partner enters the password through the login screen.

You can clear business partner passwords under this tab, and then have the partners enter new ones the next time they log in to the MAPICS CRM Web site. Or, you can assign the new passwords yourself under this tab.

Data Manager Viewing Rights

You can assign five types of viewing rights for the Data Manager: Manager, Group, Marketing, Maintenance, and Import Utilities. You can select an option to grant the business partner rights to use that portion of the utility.

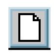
For business partners to have rights to use the Data Manager, the utility must be installed on their computers. Data Manager rights are specific to each partner's login ID.

Assigning a Business Partner's Company

Assigning a business partner's company is similar to assigning a customer's company. The difference is that you want to assign this business partner login ID to its company record.

For example, if Coordinated Bicycles is a business partner of your company, you want to assign this login ID to the Coordinated Bicycles company record. Coordinated Bicycles must already be an account in MAPICS CRM.

To assign a company, do the following

1. In the Business Partner dialog, click the **Company** tab.
2. Click **New**. The Criteria dialog displays.
3. Above the criteria box, click  to create a search filter.

4. In the Criteria dialog, fill in the following information:
   - Field Name - Select the field name to filter on, such as **CompanyName**.
   - Operand - Select the search operand. The relevant operands display, based on the selected field.
   - Criteria - Enter or select the information you want to search for.
5. Click **OK** to save the filter.
6. Click  to start the search. The results of the search display in the Result box.
7. In the Result box, select the customer’s account or company record. The company name then displays in the Selected Company field at the bottom of the screen.
8. Click **Apply** to save your selection and leave the dialog open.

To check this entry:

1. Access the MAPICS CRM Web site, and open the Accounts List view.
2. Search for the companies where **MAPICS** is the business partner.
3. Open these company records, and click the **External** tab under the detail view.
4. You will see a Business Partner hyperlink search control. Select the **Find** icon associated with this field. The list view dialog displays.
5. Search for and select the MAPICS company.

   You have just assigned the MAPICS company, **Business Partner**, to this company record.

You can perform the same procedure for as many companies as necessary. When MAPICS business partners log in, they will be able to see only their assigned companies.

Territory Maintenance

Creating Territories

After you have created your territory rollup levels (see “Territory Rollup” on page 3-26), you can build your territories. Territories help define who can view what data, based on viewing options.

After building the territories, assign your employees (and their viewing options) to the appropriate ones. When the employees log in to MAPICS CRM, they will see records assigned only to their respective territories.

You should assign every account record in MAPICS CRM to a territory.

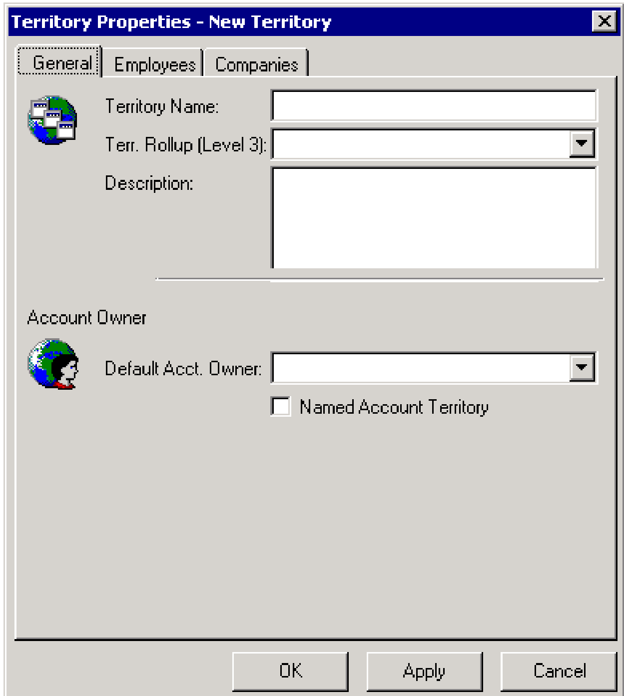
You can define territories in any number of ways. MAPICS CRM offers the flexibility to match how your company divides its potential customers. For example, you may want to divide your opportunities by region, state, ZIP/postal code, salesperson, or industry.

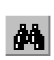
If your company does not use territories, we recommend that you create only one territory and assign all companies to it.

Adding Territories

1. Open the Data Manager (see “Logging in to the Data Manager” on page 1-3 for instructions).
2. In the Folder Items tree view in the main window, select the **Territories** entry under the Manager Root folder.

3. Click **New**. The Territory Properties dialog displays.

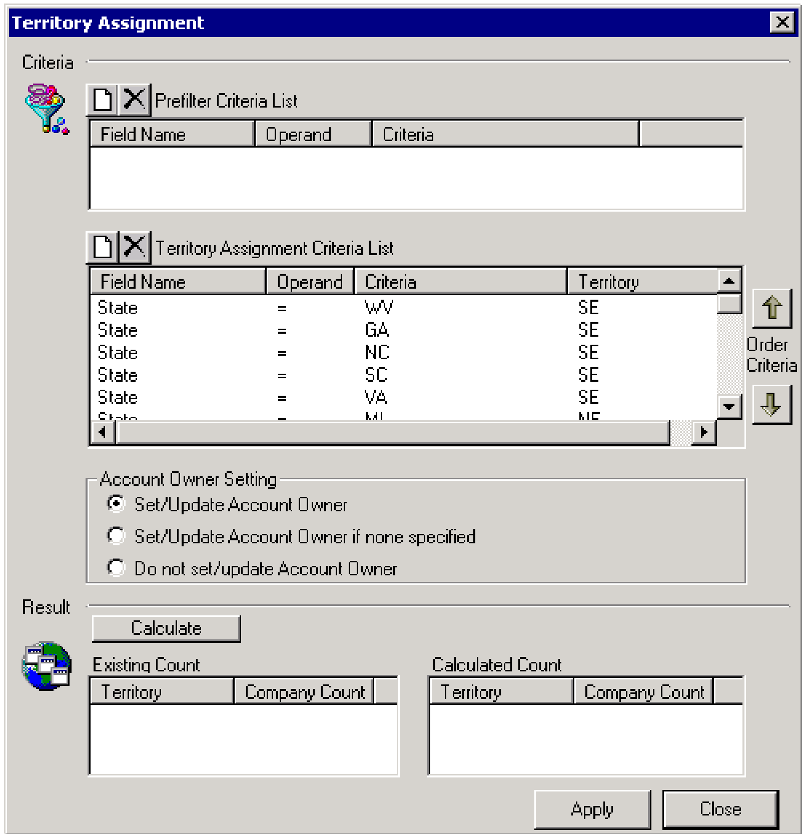


4. In the Territory Name under the General tab, enter a descriptive name for the territory.
5. In the Territory Level 3 field, select the territory level 3 parent this territory belongs to.
6. In the Default Acct Owner field, select the employee who is usually responsible for the accounts in this territory.
7. Click the **Employee** tab.
8. Select all the employees who are a part of this territory. Note that you can assign employees to territories at any time; if you have not yet built your employee list, you can assign employees at a later time.
9. Click the **Company** tab.
10. Click **New**. The Criteria dialog displays.
11. Above the criteria box, click  to create a search filter.
12. In the Criteria dialog, fill in the following information:
    - Field Name - Select the field name to filter on, such as **CompanyName**.
    - Operand - Select the search operand. The relevant operands display, based on the selected field.
    - Criteria - Enter or select the information you want to search for.
13. Click **OK** to save the filter.
14. Click  to start the search. The results of the search display in the Result box.
15. In the Result box, select the customer's account or company record. The company name then displays in the Selected Company field at the bottom of the screen.
16. Click **OK** to save your selection and close the dialog.

Territory Assignment

Through the Territory Assignment feature in the Data Manager utility, you can assign data records to specific territories, based on criteria you define. For example, if you are importing a large number of companies into MAPICS CRM, you can automatically assign them to territories rather than having to do so individually. If you need to manually assign companies to their correct territories, follow these steps:

1. Open the Data Manager (see “Logging in to the Data Manager” on page 1-3 for instructions).
2. In the Folder Items tree view in the main window, double-click **Territory Assignment** under the Manager Root folder. The Territory Assignment dialog displays.



3. If you want to use a prefilter,  above the Prefilter Criteria List box. Then, select the field name, operand, and criteria.
4. Click  above the Territory Assignment Criteria List box, and fill in information in the appropriate fields.
5. Select one of these Account Owner Setting options:
   - Set/Update account owner - Each company will take the value of the account owner that is assigned for that territory.
   - Set/Update Account Owner if none specified - You will be able to update only those company records that have no account owner assigned.
   - Do not set/update Account Owner - You will not be able to update any account owners.
6. Click **Calculate** above the Results box to run the filter and display the results in the Calculated Count area.

7. Click **Apply** to apply all the changes you have made.
8. Click **Close** to close the dialog.

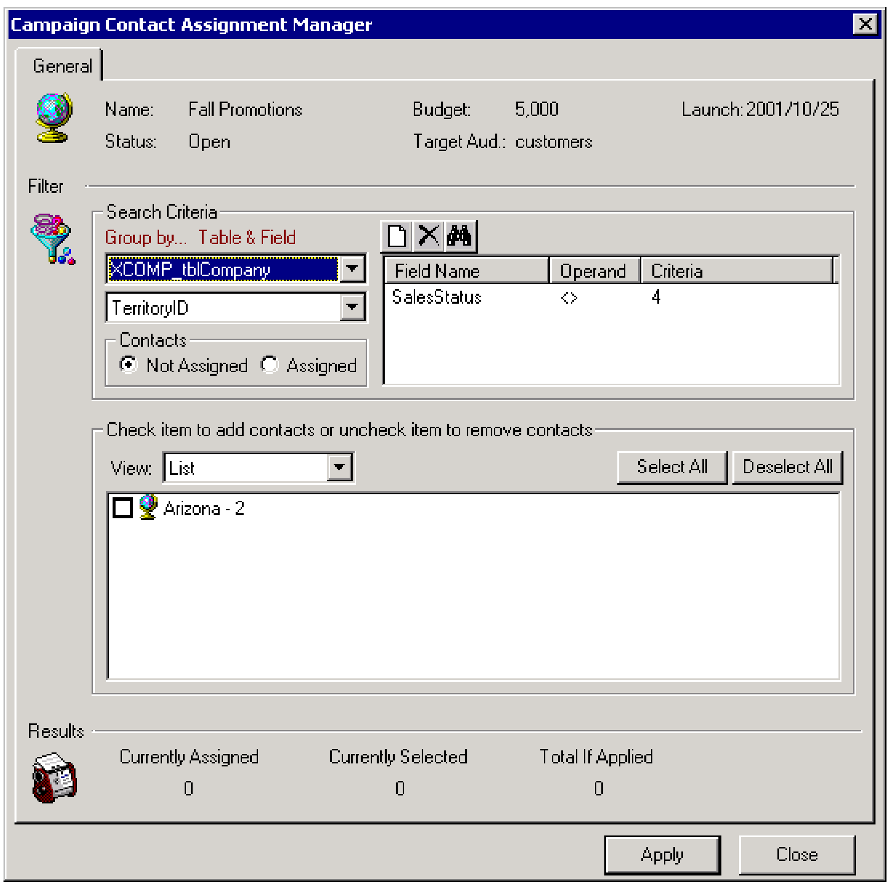
Marketing Automation

Campaign Contact Management

Campaigns are created in the Marketing module of MAPICS CRM. System Administrators use the Campaign Contact Management module in the Data Manager to assign the contacts to campaigns.

To access the Campaign Contact Management feature:

1. Open the Data Manager (see “Logging in to the Data Manager” on page 1-3 for instructions).
2. In the Folder Items tree view, highlight the **Campaign Contact Management** entry in the Marketing Automation folder.
3. The right side of the main window is updated with a list of all the campaigns in MAPICS CRM. You can open a campaign by double-clicking its name. The Campaign Contact Assignment Manager dialog displays.



The information at the top of the dialog matches the values found in MAPICS CRM. The bottom of the dialog contains three fields that display search results. When you access this dialog, the Currently Assigned field shows how many contacts are currently assigned to the campaign. The Currently Selected and Total If Applied fields display the results of a search, before you apply them to a campaign.

Searching for Contacts for a Campaign

To search for contacts to add to a campaign:

1. Make sure that you are working with the campaign in the Campaign Contact Assignment Manager dialog.
2. In the Search Criteria box, select the table and field you want to sort by. The table values can be **XCOMP_tblCompany** (accounts) or **CON_tblContact** (contacts). The values that display in the Field selection list are contingent on the table you select.
3. In the Contacts area, select either **Not Assigned** or **Assigned**. This action will show you either all contacts that are assigned to the campaign, based on the Group By criteria, or it will show you all contacts that are not assigned to the campaign, based on the same criteria.
4. Click **Search** to perform the search. The list of results displays.

Assigning Contacts to a Campaign

To assign a contact to a campaign, do the following:

1. Select the check box next to the value visible in the bottom window. All the contacts connected to that value will be assigned to the campaign.
2. You can remove contacts from the campaign by clearing the check box.
3. To select all the contacts found in the search, click **Select All**. Or to remove them all, click **Deselect All**.
4. After you have selected all the contacts for the campaign, click **Apply** to assign them.

Creating a New Search

To add new search criteria, do the following:

1. Click . The Criteria dialog displays.
2. Enter the following information:
   - Table Name - Select the search table name.
   - Field Name - Select the search field name. The field name values will be contingent on the choice of Table Name.
   - Operand - Select the search operand.
   - Criteria - Enter the data you want to search for.
3. Click **OK**.
4. Click **Search** to perform the search.

Campaign Activity Fulfillment

You use the Data Manager utility to fulfill campaign activities.

NOTE

You must assign a contact to a campaign before you can complete an activity for it.

To fulfill a campaign activity, do the following:

1. Open the Data Manager (see “Logging in to the Data Manager” on page 1-3 for instructions).
2. In the Folder Items tree view in the main window, select the **Campaign Activity Fulfillment** entry under the Marketing Automation folder. The list of campaign activities with the status *Planned* displays in the right pane.

3. Double-click the entry of the activity you want to fulfill. A message asks if you want to complete this activity. Click **Yes**. Data is then retrieved from the Campaign and Campaign Activity tables.

   After choosing **Yes** to fulfill an activity, the following actions will take place for each type of activity.

Library

If the campaign activity type is **Library**, a new library record is created for each contact assigned to the campaign. A record in the Contact Library table is created for each contact, setting the following information:

- Contact Name
- Account Name
- Quantity to **1**
- DateRequested to the current date
- DeliveryMethod to the activities delivery method, and
- ChangeDate to the current date and time.

The campaign activity's status is then updated from *Planned* to *Completed*, the completion date is set, and the change date is updated.

Prospecting

If the campaign activity type is **Prospecting**, the recall date for each contact assigned to the campaign is set to the current system date, and the change date is updated. The campaign activity's status is updated from *Planned* to *Completed*, the completion date is set, and the change date is updated.

Other Campaign Activity

Any other type of campaign activity only updates the status from *Planned* to *Completed*, sets the completion date, and updates the change date for the activity record.

Library Fulfillment

The Library Fulfillment area of the Data Manager enables your sales force and system administrators to work together.

When a campaign includes a library item and the Campaign Contact Management utility is run, the library item is then listed in the Library Fulfillment list in the Data Manager.

Fulfilling a Library Item

To fulfill a library item, do the following:

1. Open the Data Manager (see “Logging in to the Data Manager” on page 1-3 for instructions).
2. In the Folder Items tree view in the main window, select the **Library Fulfillment** entry in the Marketing Automation folder. The right side of the window is updated with a list of pending library items.
3. Double-click the library item you want to fulfill.
4. A message asks if you want to fulfill the library item. Click **Yes**.
5. Depending on the delivery method of the item (selected under the Library Fulfillment child tab on the Contact detail screen), you can use any functionality available in Word to execute the library item.

   If **Printer** is selected as the delivery method, you need to select the **Merge to Printer** option in Word to merge all of the items to the printer.

   If **Text File** is selected as the delivery method, Word will place the items in a text file.

If **Electronic Mail** is selected as the delivery method, you will need to select **Merge to E-mail** in Word.

If **Phone** is selected as the delivery method, the recall date on the Contact detail screen will be set to the current system date.

6. When you have completed fulfilling the library item, a message asks if you want to mark the library item as **Sent**. Click either **Yes** or **No**.
7. When you have fulfilled the library item, the MAPICS CRM Web site shows the updated status information in both the Library Item Sent/Sending To child list view and the Contact's Library Items child list view.

Dropdown List Maintenance

Dropdown lists are predefined lists of values which are connected to certain fields in MAPICS CRM. To enter values in these fields, users select from the list of possible values. You can customize these values to match your company's requirements.

You can set most dropdown list values after MAPICS CRM has been installed. This way, you can view how the dropdown lists work before changing or adding new ones.

You should set some dropdown list values before subsequent steps are completed. At the minimum, you should set appropriate values for **ICOMP_tblEmployee.Title**, the employee title field, because you will be assigning these titles to your employees.

Setting Dropdown List Values

To set values for dropdown lists in the Data Manager, follow these steps:

1. Open the Data Manager (see "Logging in to the Data Manager" on page 1-3 for instructions).
2. In the Folder Items tree view in the main window, select the **Dropdown Maintenance** entry in the Maintenance folder. A master list of the current dropdown lists displays in the right hand pane.
3. To add a dropdown list, click **New**.
4. Select the table and field to which the dropdown list applies. The standard format for all dropdown lists is *TableName.FieldName*.
5. Enter the new item, and click **New** to the right of the field to place the item in the New Item field.
6. If you want to change the order of the items in the Item List, use the arrows to the left of the box. The items in the Item List will display from top to bottom in MAPICS CRM.
7. To edit an existing dropdown list, double-click its name in the master list and repeat steps 5 and 6.

About Locking Dropdown List Boxes

We do not recommend that you lock dropdown lists. Once a list has been locked, you cannot unlock it.

Some dropdown lists are System dropdown lists, and have functionality associated with their values. You must never change these locked dropdown lists.

In most cases, the values in the dropdown lists you create will not have functionality associated with them, and therefore should not be locked.

Creating the Opportunity Pipeline

The Sales pipeline is designed to help your sales staff through the sales process. Thus, it must be designed around how you sell. You must create this pipeline before any records are stored in the **OPP_tblOpportunity** table.

Since sales methods are based on the Sales pipeline, you must also create this pipeline before you create sales methods. For procedures on creating sales methods, see “Sales Methods and Tasks” on page 3-22.

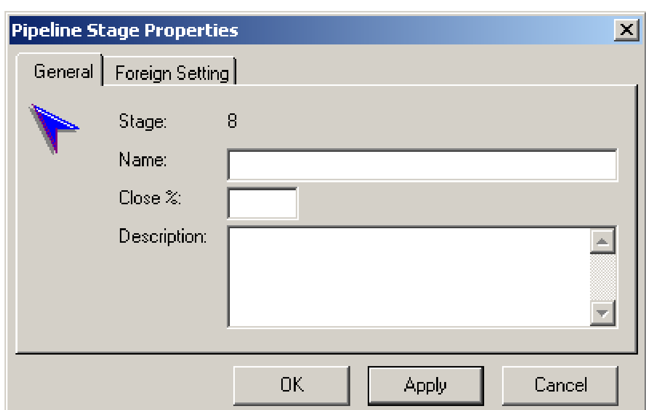
Since the number of stages in the pipeline is critical to the reporting capability of MAPICS CRM, you cannot change this number after creating the pipeline and entering the first record into the Opportunity table. Spending the time early on in the implementation process to carefully plan a pipeline that is designed to fit your company's sales process is vital to making the application a useful tool. We recommend that you consult with MAPICS in this area if you have any questions.

Setting up Pipeline Stages

When adding new pipeline stages, you must enter a stage name and a close percentage value for the stage. The stage name displays in the MAPICS CRM Opportunity detail view. The close percentage identifies how far along the pipeline the opportunity is and how close the deal is to being "won." Examples of pipelines are loaded into the application for your reference.

To set up the sales pipeline:

1. Open the Data Manager (see “Logging in to the Data Manager” on page 1-3 for instructions).
2. In the Folder Items tree view in the main window, open the **Maintenance>Opportunity Maintenance** folders, and then select the **Pipeline Setup** entry. A seven-stage sample pipeline displays in the right pane. You can change this pipeline to match your company’s needs.
3. To add new stages to the list, click **New**. The Pipeline Stage Properties dialog displays.



4. In the Name field, enter the name of the stage.
5. In the Close % field, enter the close percentage of the stage.
6. Click **OK**.

Changing the Value of an Existing Stage

To change the value of an existing stage, double-click the stage name in the right pane of the main window. The Pipeline Stage Properties dialog displays.

You will want to change the values of all stages that are currently in the sample pipeline.

Deleting a Stage

To delete a stage, select it in the right pane of the main window, and then click **Delete**.

Creating the Project Phases

Before you can build projects through MAPICS CRM, you must first set up the pipeline that your projects will use. You set up the Project pipeline in the Data Manager.

It is crucial that you think about your project pipeline before setting it up. If you set up the pipeline and then build projects in MAPICS CRM, you will not be able to change the Project pipeline.

To set up the Project pipeline, follow these steps:

1. Open the Data Manager (see “Logging in to the Data Manager” on page 1-3 for instructions).
2. In the Folder Items tree view in the main window, open the **Maintenance>Project Maintenance** folders, and select the **Project Phase Setup** entry. A sample Project pipeline displays in the right pane.
3. Double-click the stage you want to change. You can include from one to nine stages in your Project pipeline, similar to the Opportunity pipeline.
4. If you want to add a stage to the end of the sample pipeline, click **New**; the next stage displays as a blank dialog. Fill it out accordingly.
5. In the Close % field, enter a close percentage for the stage.
6. In the Description field, enter a description of the phase.
7. Click **OK**.

Sales Methods and Tasks

About Sales Methods and Tasks

Sales methods are based on your Sales pipeline. Each sales method can contain tasks that are part of a given stage in the pipeline.

Examples of sales methods are provided. You may use them or build your own. You can use as many sales methods as necessary; however, you can have only one Sales pipeline that all the sales methods are built around.

When using MAPICS CRM, salespeople are automatically reminded of their tasks, based on the sales methods they associated with their opportunities. Tasks are automatically created in the Tasks child list, based on how far along the pipeline the opportunity is. When the set of tasks for one stage is completed, the tasks for the next stage are generated.

Sales methods are not required for the Sales pipeline to work, but they are helpful in creating standardized sales processes and reporting consistency.

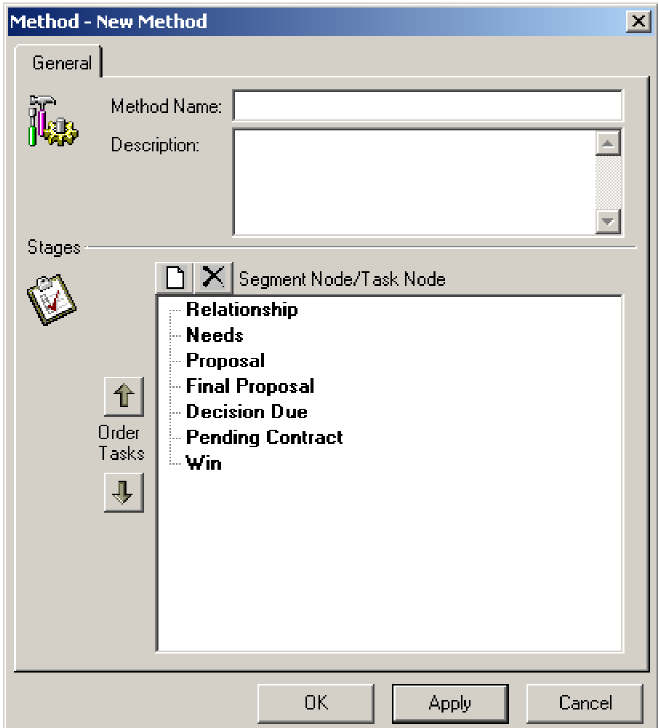
Tasks are assigned by role, so tasks within one method can be assigned to any role in the organization. The roles correspond to the titles that are assigned to employees in the Data Manager. For instance, a task for proposal approval might be assigned to a sales manager.

Salespeople do not have to be responsible for every step in the pipeline. By automatically assigning tasks to the roles that are responsible for completing them, MAPICS CRM helps to streamline the sales process.

Defining Sales Methods

To define a sales method, do the following:

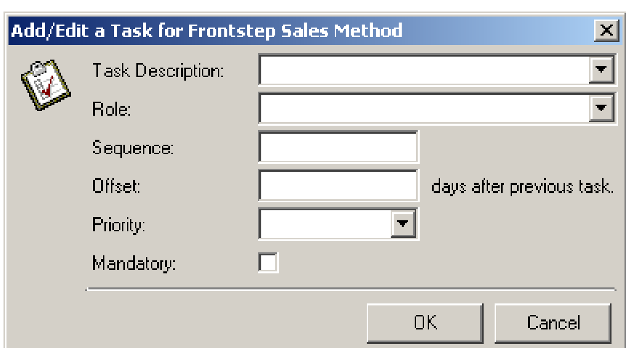
1. Open the Data Manager (see “Logging in to the Data Manager” on page 1-3 for instructions).
2. In the Folder Items tree view in the main window, open the **Maintenance>Opportunity Maintenance** folder, and select the **Dropdown Maintenance** entry.
3. Click **New**. The Method dialog displays.



4. In the Method Name field, enter a descriptive name for the method.
5. In the Description field, enter a description of the method.
6. Click **OK**.

Adding Tasks to a Method

1. To add tasks to the method, highlight one of the stage names listed in the Stages Segment Node/Task Node area, and click **New**.



2. Fill in each of the fields listed in this table:

Field	Description
Task Description	This field contains a few predefined task descriptions that you may elect to use, but you are not limited to them. You may type any description you want. The value you establish here will display as the task in the Task child list for the opportunity.
Role	Select the role that will be responsible for performing this task. The list contains the values you defined earlier for employee titles.
Sequence	Enter a number to represent what order the tasks will display under the stage.
Offset	Enter the number of days after the previous task that this task should be completed.
Priority	Select one of three possible values: **Low**, **Medium**, or **High**.
Mandatory	You can make any task in your sales method mandatory by selecting this field. If selected, users will be forced to open the task and set the status to *Closed* before it can move to the next stage in the pipeline.

3. To sort the order in which the tasks will display, click the arrows to the left of the tasks.
4. Click **OK**.

Project Methods and Tasks

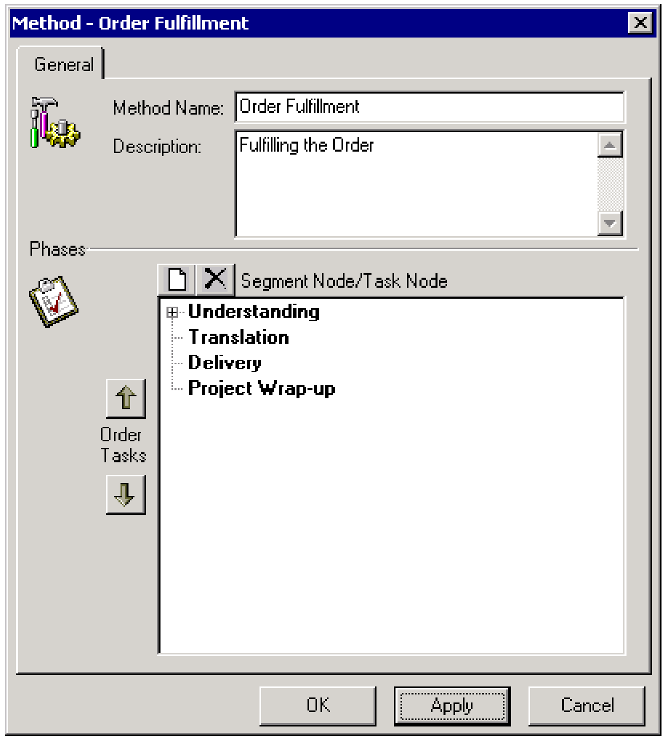
Defining Project Methods

The setup procedure for methods applied to the Project pipeline is exactly the same as that for methods applied to sales/opportunities. You can set up method tasks that fall under each of the phases of your Project pipeline. You can also set up any number of tasks for each phase.

To define a project method, do the following:

1. Open the Data Manager (see “Logging in to the Data Manager” on page 1-3 for instructions).
2. In the Folder Items tree view in the main window, open the **Maintenance>Project Maintenance** folder, and select the **Project Method Maintenance** entry.

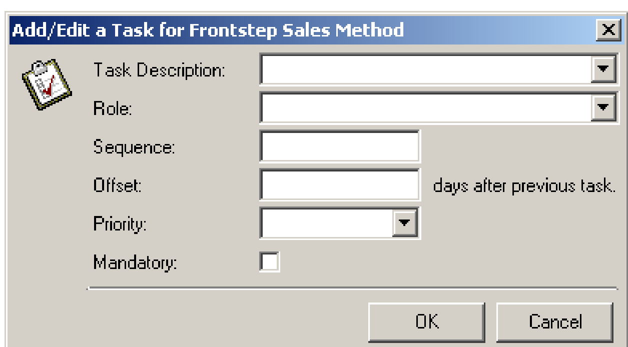
3. Click **New**. The Method dialog displays.



4. In the Method Name field, enter a descriptive name for the method.
5. In the Description field, enter a description of the method.
6. Click **OK**.

Adding Tasks to a Project

1. To add tasks to a method, highlight one of the stage names listed in the Stages Segment Node/Task Node area and click **New**.



2. Fill in each of the fields listed in this table:

Field	Description
Task Description	This field contains a few predefined task descriptions that you may elect to use, but you are not limited to them. You may type any description you want. The value you establish here will display as the task in the Task child list for the opportunity.
Role	Select the role that will be responsible for performing this task. The list contains the values you defined earlier for employee titles.
Sequence	Enter a number to represent what order the tasks will display under the stage.
Offset	Enter the number of days after the previous task that this task should be completed.
Priority	Select one of three possible values: **Low**, **Medium**, or **High**.
Mandatory	You can make any task in your sales method mandatory by selecting this field. If selected, users will be forced to open the task and set the status to *Closed* before it can move to the next stage in the pipeline.

3. To sort the order in which the tasks display, click the arrows to the left of the tasks.
4. Click **OK**.

After you have designed your Project pipeline and established its methods, you can create your projects in MAPICS CRM. Each new project will use this Project pipeline. You can assign any method to a project.

Territory Rollup

The Territory Rollup feature of the Data Manager helps you organize your territory list. MAPICS CRM requires that you create a territory rollup structure.

The territory rollup structure is based on three levels. To have a complete territory rollup, you must designate values for all three levels.

NOTE: You may define as many Level 1, Level 2, and Level 3 values as you want. The only requirement is that the Level 2 and Level 3 values roll up to a higher value.

Creating Territory Rollups

To build your own territory rollup, follow these steps:

1. Open the Data Manager (see “Logging in to the Data Manager” on page 1-3 for instructions).
2. In the Folder Items tree view, select the **Territory Rollup** entry in the Maintenance folder.
3. Click **New**. The Add Territory Level dialog displays.
4. To create first-level territory rollups, do the following:
   a. Select **Roll Up 1** in the Level field.
   b. Select a territory.
   c. Enter a description for this territory in the Description field.
   d. Click **OK**.
5. To create second-level territory rollups, do the following:

   a. Select **Roll Up 2** in the Level field.
   b. Select a Roll Up 1 territory in the Parent Territory field.
   c. Enter a description for the Roll Up 2 territory.
   d. Click **OK**.

6. To create third-level territory rollups, do the following:
   a. Select **Roll Up 2** in the Level field.
   b. Select a Roll Up 2 territory in the Parent Territory field.
   c. Enter a description for the Roll Up 3 territory.
   d. Click **OK**.

   When you add territories, they will display under the Level 3 Rollup.

Deleting Territory Rollups

To delete a territory rollup, select the territory and click **Delete**.

Account Rollup

The Account Rollup feature of the Data Manager is designed to help organize your accounts. It is designed similarly to the Territory Rollup feature.

We recommend that you build an account rollup structure if you are dealing with a large corporation that can be broken down into smaller components.

You may define as many Level 1, Level 2, and Level 3 values as you want. The only requirement is that the Level 2 and Level 3 values roll up to a higher value.

Creating Account Rollups

1. Open the Data Manager (see “Logging in to the Data Manager” on page 1-3 for instructions).
2. In the Folder Items tree view in the main window, select the **Account Rollup** entry in the Maintenance folder.
3. Click **New**.
4. To create first-level account rollups, do the following:
   a. Select **Roll Up 1** in the Level field.
   b. Select an account.
   c. Enter a description for the Level in the Description field.
   d. Click **OK**.
5. To create second-level account rollups, do the following:
   a. Select **Roll Up 2** in the Level field.
   b. Select a Roll Up 1 account in the Parent Territory field.
   c. Enter a description for the Roll Up 2 account.
   d. Click **OK**.
6. To create third-level account rollups, do the following:

a. Select **Roll Up 2** in the Level field.

b. Select a Roll Up 2 account in the Parent Territory field.

c. Enter a description for the Roll Up 3 account.

d. Click **OK**.

7. When you have completed entering the account rollups, click **Close**.

Deleting Account Rollups

To delete an account rollup, select the account and click **Delete**.

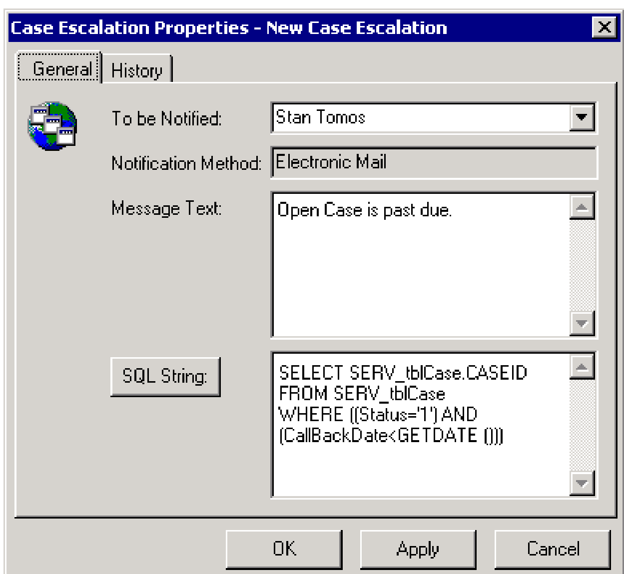
Case Escalation Maintenance

When you set the 'Status Call Time' on the Serv_tblAgreement detail view, you set the time for the case escalation to execute.

For instance, if the Status Call Time is greater than 16 hours, the Case Escalation that you created would execute. The Data Manager Case Escalation has to be used in conjunction with the Status Call Time for the Case Escalation to execute successfully.

To create a case escalation, do the following:

1. Open the Data Manager (see “Logging in to the Data Manager” on page 1-3 for instructions).
2. In the Folder Items tree view in the main window, select the **Case Escalation** entry in the Maintenance folder.
3. Click **New**. The Case Escalation dialog displays.



4. Under the General tab, fill in information in the following fields:
   - Notified - Select the employee to notify.
   - Notification Method - the notification method displays. Generally the escalation will generate an e-mail message.
   - Message Text - Enter the message text for the escalation message.
   - SQL String - Click **SQL String** to enter a valid SQL String query. A SQL Editor dialog displays. The SQL String is a trigger that will execute the case escalation, based on the query criteria you enter.
5. You can click the **History** tab to view the case history.
6. Click **Save** to save the query.

4

View Designer

This chapter applies to MAPICS CRM only.

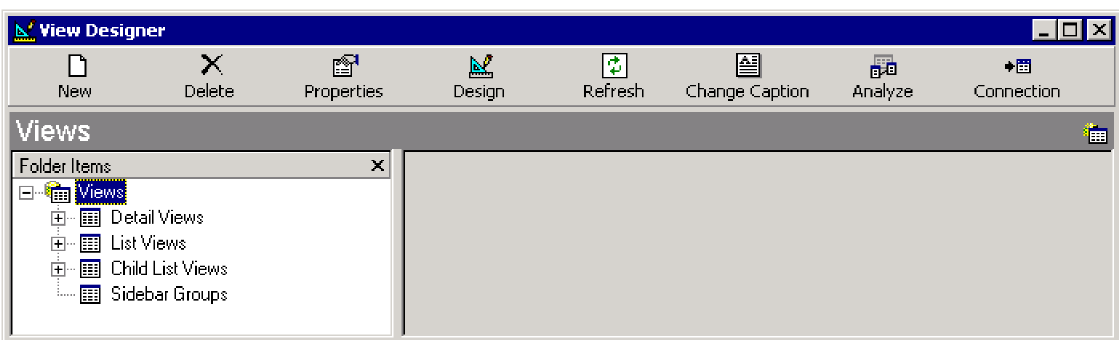
The View Designer utility enables you to create custom views to control what data is displayed and how it looks on the MAPICS CRM Web site.

This chapter discusses the following topics:

- View Designer Main Window
- Types of Views
- View Designer Layout
- List Views
- Adding New Fields to Existing Tables
- Creating Command Buttons on Detail Views
- Maintaining Sidebar Groups

The View Designer Main Window

When you successfully log in to the View Designer, the main window displays.



The left pane contains an expandable list of all the views in MAPICS CRM, organized by view type. You can click the plus (**+**) sign next to a view type to see its list of views. When you highlight a view in the left pane, the right pane is updated with its list of defined views.

View Designer Toolbar

The View Designer toolbar contains the following buttons:

Button	Description
New	Create a new view
Delete	Delete a new view
Properties	Display a view's properties
Design	Display the Detail Designer or List Designer
Refresh	Redisplay the screen's information
Change Caption	Update a field table caption
Analyze	Display the Metadata Integrity Verification utility
Connection	Display the Database Connection dialog
About	Display system information about the View Designer

Types of Views

The way data is displayed to users on the MAPICS CRM Web site is called a "view." Three kinds of views are available: detail, list, and child list.

- **Detail View** - Enables users to adjust data for the selected record, and may have multiple tabs.
- **List View** - Enables users to search for records in the database, but they cannot directly change records. Also referred to as a search view.
- **Child List View** - Displays directly below a detail view, listing information that is related to the selected detail record. This type of view may have multiple tabs; the total number of tabs possible depends on the type of detail record.

You can customize each view for your organization.

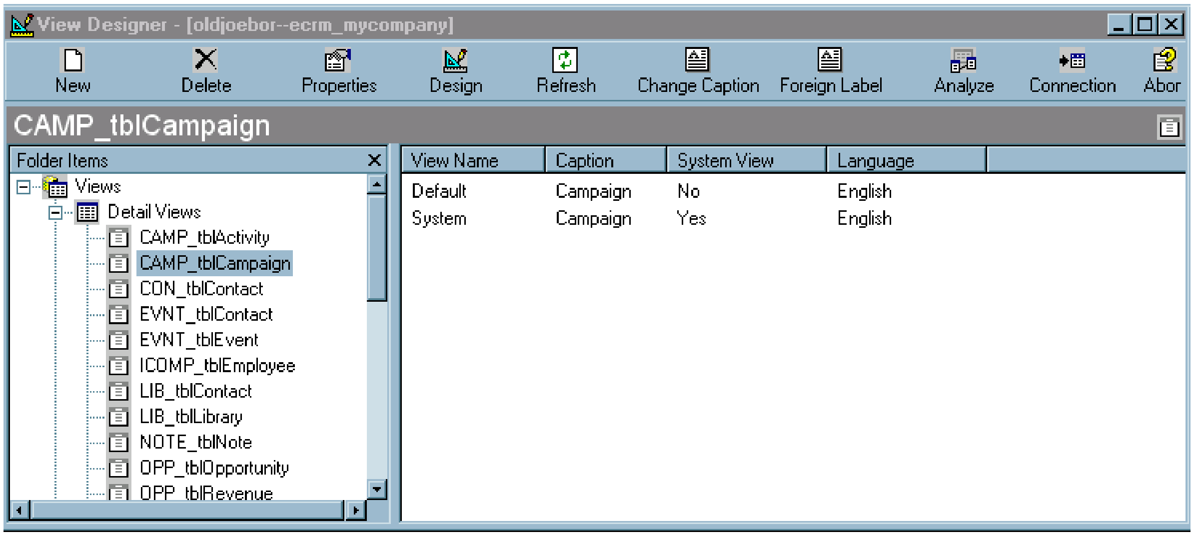
Views can also be used to provide a level of security. You can restrict which views, and therefore what data, a user sees. For views users have rights to see, you can further restrict what fields they can see in a record. You can even grant a user edit rights to individual fields in a view, as well as record addition or deletion rights.

Typically, an organization has multiple views for a table in the database, such as one for sales, one for customer service, one for business partners, one for customers, and one for telemarketers. Notice that the views are divided by roles; Sales has its views, customers have theirs, and so on. This structure restricts access between groups. You probably do not want your customers to have the same access to your data as your salespeople.

View Designer Layout

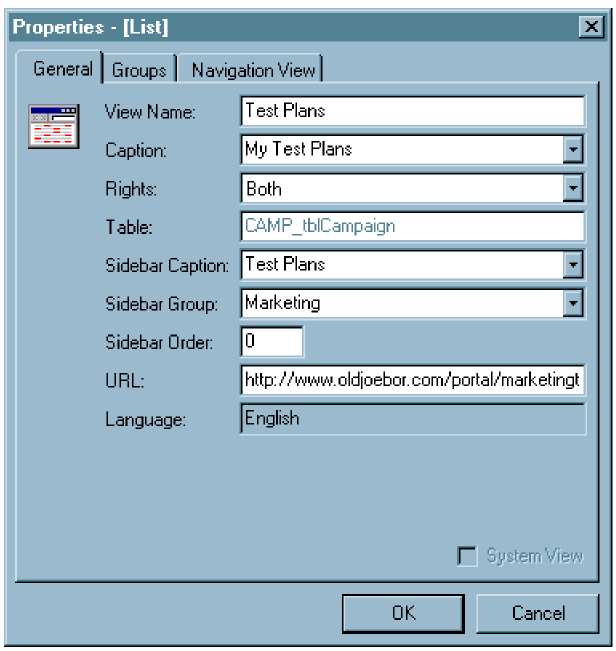
When you open the View Designer, folders for each of the views display: **List**, **Detail**, and **Child List**. Clicking the plus (+) sign next to any of these options displays a list of tables. These tables already have System views built for them which are for your use. You cannot customize these views; however, you can create new views based on them.

You can select any table name to see the System view for that table. The names of the view(s) display on the right side of the window. You should see an entry for **System**, as in this example:



Properties

Each view has a Properties area associated with it. Simply select the view and click **Properties**. This example shows the properties for a List view.



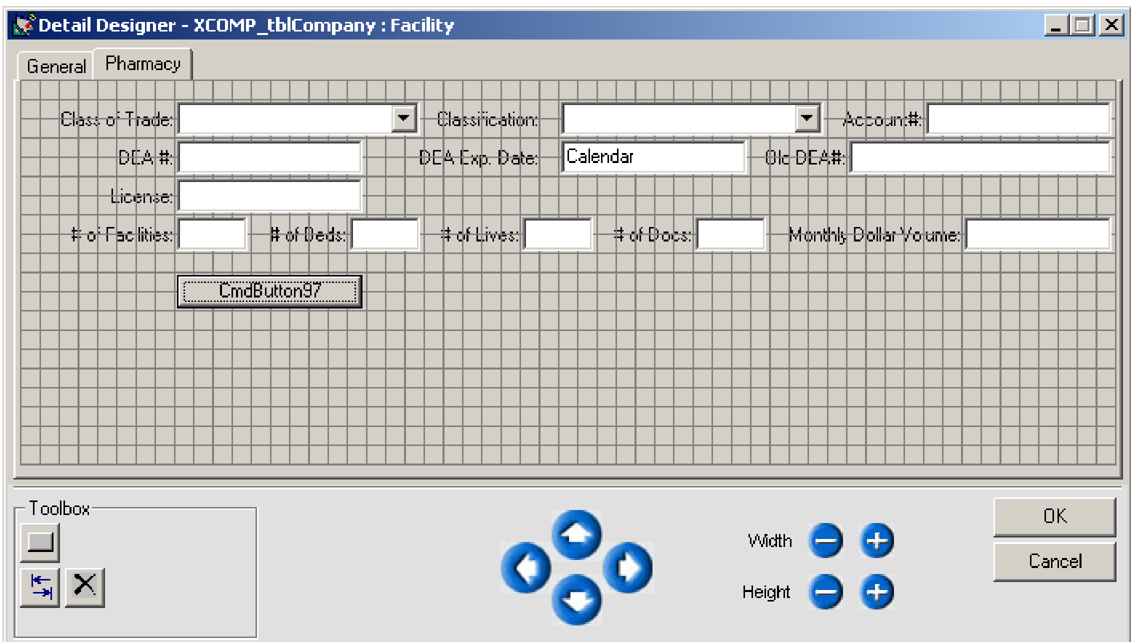
This table describes the fields in the Properties dialog.

Field	Description
View Name	Displays the name of the view
Caption	Displays at the top of the MAPICS CRM screen when users open this view
Rights	Controls whether or not users who are assigned this view can add and delete records
Table	Displays the name of the table the view is based on

Field	Description
Sidebar Caption	Displays the name of the view as it will be displayed in the sidebar
Sidebar Group	Displays the name of the sidebar where this view belongs
Sidebar Order	Shows the order in which the view displays in the sidebar
URL	Shows the URL (path) of the view
Language	Shows the default language of the view

Detail Designer

Each view has a Detail Designer area associated with it. To open the Detail Designer area for a particular view, select the view name and click **Design**.



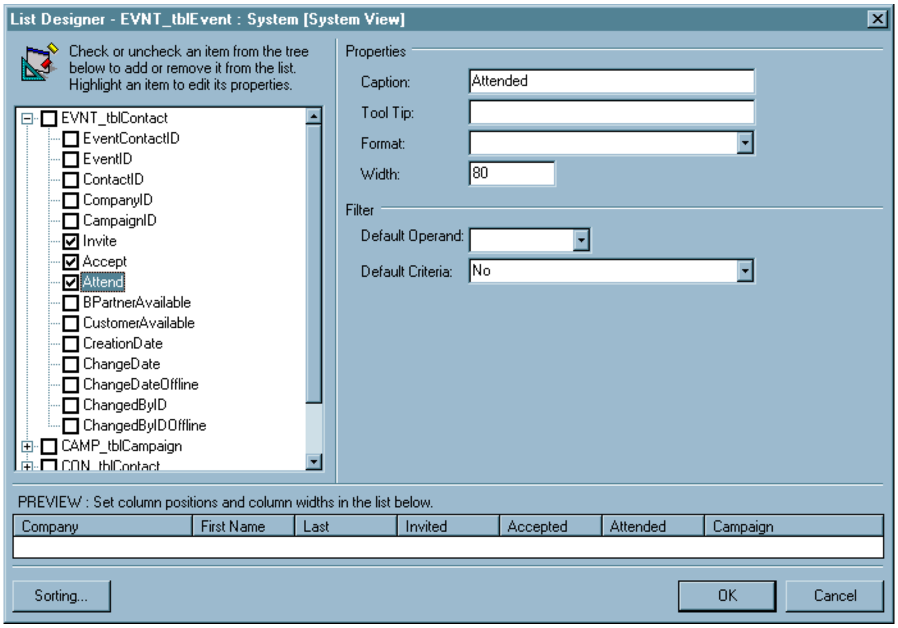
The Detail Designer area is where you lay out how the view will look. You can select the fields to include on the view from the Fields dialog. For each of the fields in a view you can adjust the properties, such as its field length, data formatting options, label name, and field type (check box, dropdown box, text box, date, etc.).

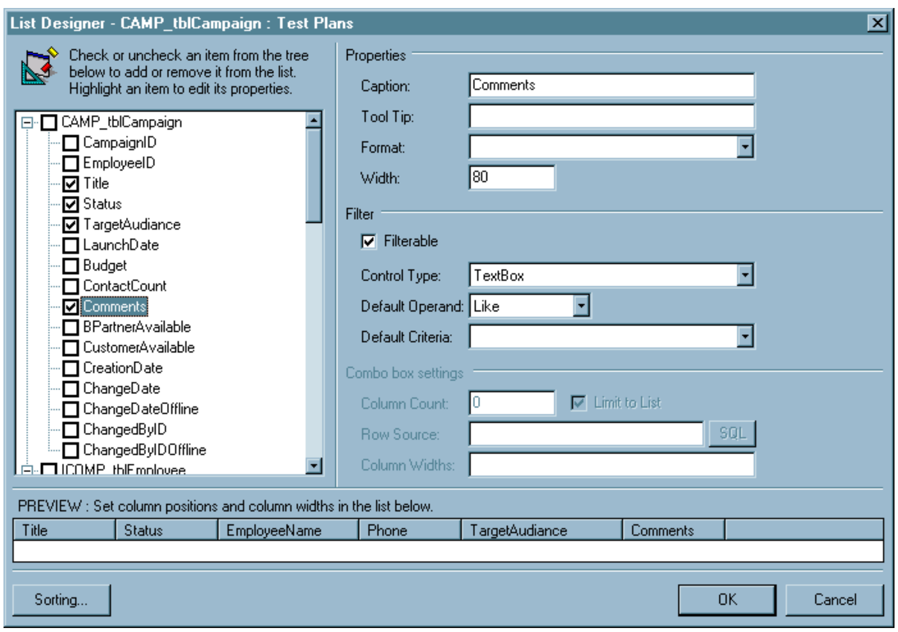
NOTE

You can add a field only once to a view.

List Designer

In the List Designer area, you can customize the properties of lists you have created. Depending on the list, you may be able to customize only certain properties.





List Views

The System views are meant to be used as is; however, you may want to use them as templates for custom views that you design.

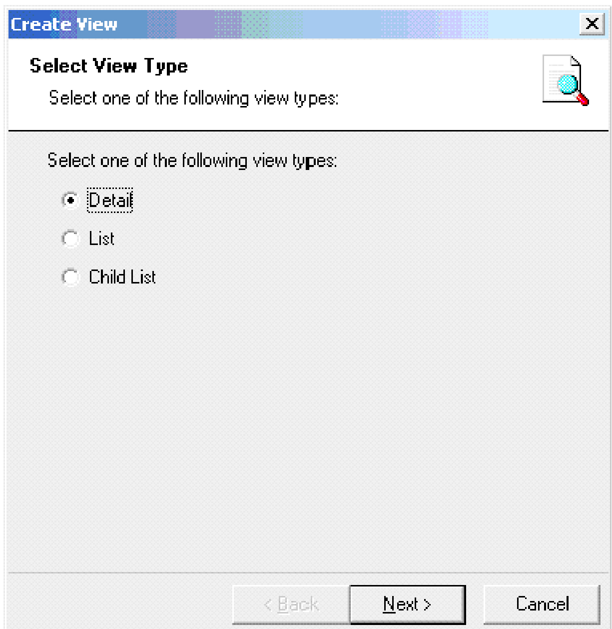
You can use a combination of System views and custom ones in your application.

NOTE You cannot customize System views; you can, however, create new views based on them.

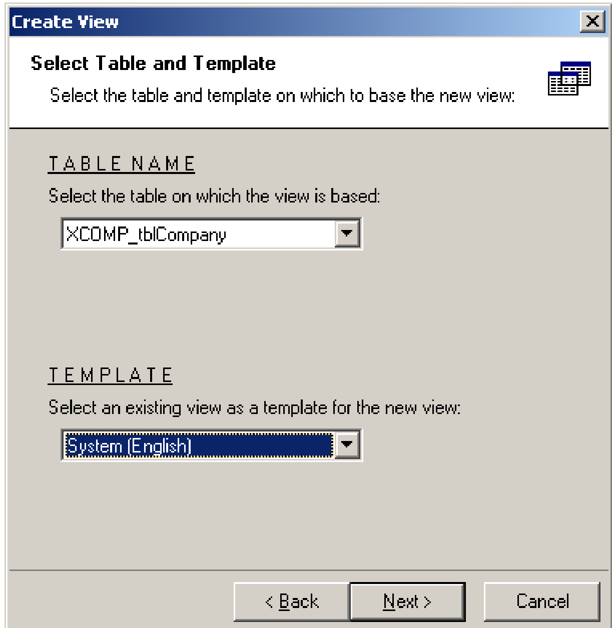
Adapting System Views

The process for using a System view as a template is the same, regardless of what kind of view you are creating. Follow these steps:

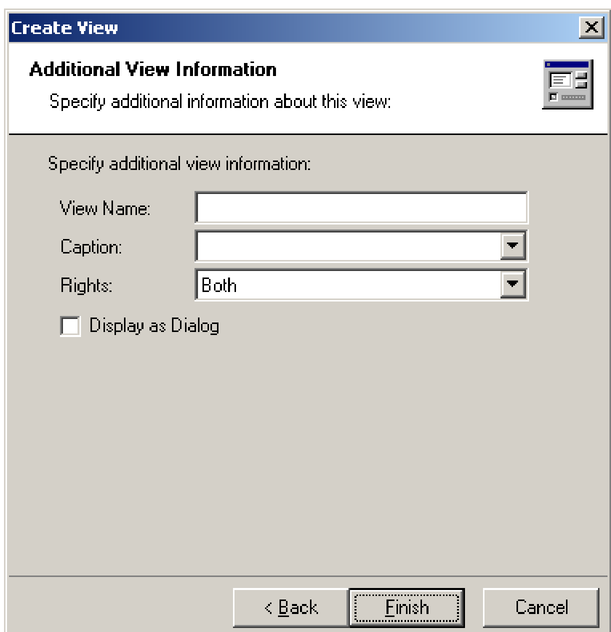
1. Click **New** on the toolbar. The Select View Type dialog displays.



2. Select the type of view you want to design, and click **Next**.



3. In the TABLE NAME field, select the table you are going to build your view around. In the above example, you are using the **XCOMP_tblCompany** table.
4. In the TEMPLATE field, select the name of the view you would like to use as a template, and click **Next**. The Additional View Information dialog displays.



5. In the View Name field, enter the name of the view, which will be used for reference when switching between multiple views on the same table.
6. In the Caption field, select a caption from the list, or enter a new one. The caption displays at the top of the view in MAPICS CRM.
7. In the Rights field, select the update rights for this view:
   - **Add** - Users can add records to the table, using this view, but they cannot delete them.

- **Delete** - Users can delete records from the table, using this view, but they cannot add them.
- **Both** - Users can both add records and delete them from the table, using this view.
- **Neither** - Users can neither add records to nor delete them from the table, using this view.

8. Click **Finish**.
9. Select the name of the table upon which you built your new view.

   The name of the new view displays on the right hand side of the screen. To modify the view, select it and click **Design** to display the Detail Designer.

Adding a Tab in the Detail Designer

After you have created a new detail view, you may want to add one or more tabs to it. To create a new tab, right-click the caption of the established tab, and then select **Add Tab**. You can then design a new tab. All the functionality that is available for the first tab is also available for all subsequent tabs.

Tips for Designing Views

If you add a field to an existing table, include some sort of identifier before the field name so that Support can determine the difference between what the user sees and what is standard in the software.

An example of a prefix is a short name for your company. If your company name is MyStudio and you want to add a custom field to a table, you might name it **MYSTBirthday**.

If you are adding a custom field to a detail view and you also want to be able to search on it, you must also put it on the associated list view.

Certain fields must always be of a specific data type in SQL to work correctly. For example, Date fields must be a **DateTime** data type in SQL.

If a custom view will not load, typically, something is wrong with one or more fields on it. It is best to begin looking at the custom fields that have been placed on the view.

Creating a List View

Called a search view on the MAPICS CRM Web site, this type of view enables you to search for records in the database. You cannot directly change records in this type of view.

The list is initially sorted in ascending, alphanumeric order by the data in the first column; however, the column headings contain up and down arrows. You can use the column to sort the data in the list. An up arrow indicates that the data is currently sorted in ascending order, while a down arrow indicates that the data is currently sorted in descending order.

Displaying Records

In a list view, 50 records can be displayed at a time. The scroll bar contains 2 buttons for displaying the next 50 and the previous 50 records. These buttons will be enabled if more than 50 records exist that match the search criteria specified by the user.

You can change the number of records that display in a list view, using the Application Manager.

1. On the server, select: **Start>Programs>MAPICS>MAPICS CRM>Application Manager**.
2. Double-click the name of your client that has been installed. Most likely only one client will have been installed, with a Client ID of **0001**. A window with the properties of this client displays.

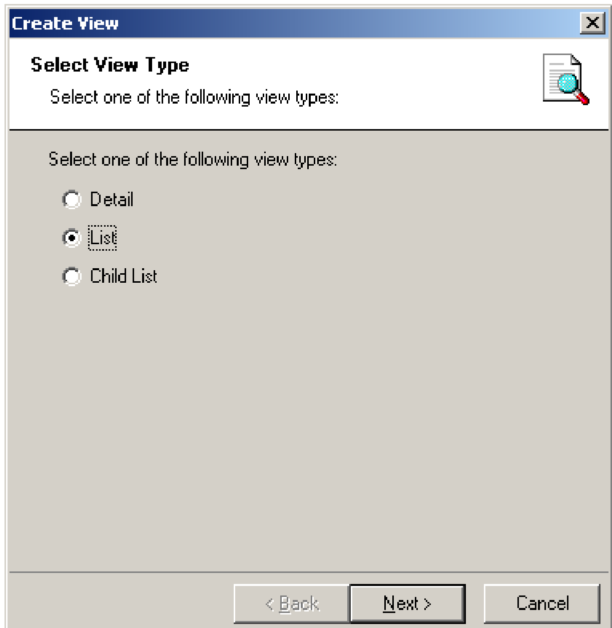
3. Click the **Database Server** tab. The value displayed in the Max Records field represents the number of records that will be returned by *all* list views within the application.

   NOTE: If you choose to set this to a higher value than 50, you may experience slower performance, depending on the size of your database and how many tethered users you have who are directly connected to the server.

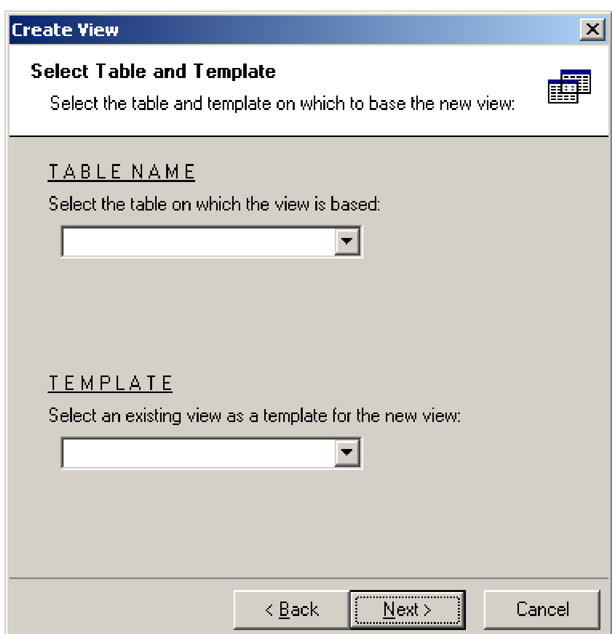
List View Procedures

To create a new list view, or a list view from a template:

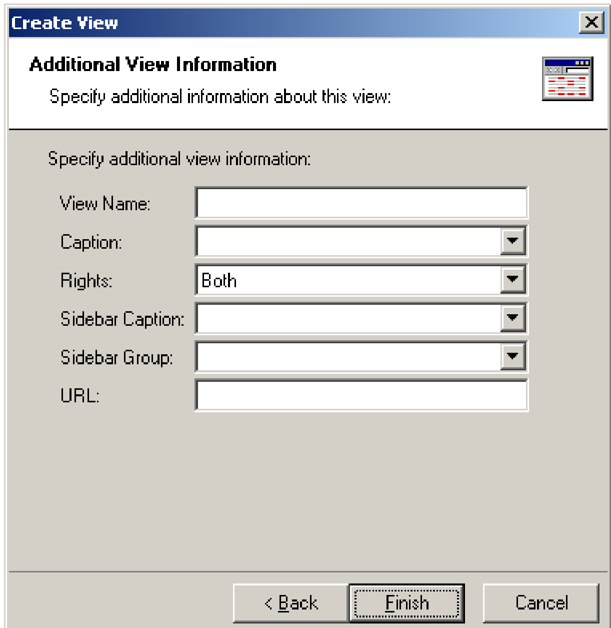
1. In the View Designer main window, click **New**. The Create View dialog displays.



2. Select the **List** option and click **Next**.



3. In the TABLE NAME field, select the table you are going to build your view around. The system view for that table displays in the TEMPLATE field. There may be more than one system view for a table.
4. In the TEMPLATE field, select the name of the view you would like to use as a template, and click **Next**. The Additional View Information dialog displays.



5. In the View Name field, enter the name of the view, which will be used for reference when switching between multiple views on the same table.
6. In the Caption field, select a caption from the list, or enter a new one. The caption displays at the top of the view in MAPICS CRM.
7. In the Rights field, select the update rights for this view:
   - **Add** - Users can add records to the table, using this view, but they cannot delete them.
   - **Delete** - Users can delete records from the table, using this view, but they cannot add them.
   - **Both** - Users can both add records and delete them from the table, using this view.
   - **Neither** - Users can neither add records to nor delete them from the table, using this view.

   NOTE: The **Add** and **Delete** rights apply to users who are assigned only to this view. You can have views for the same table where one view restricts users to only adding records and the other view allows users to add and delete records.

8. In the Sidebar Caption field, enter a sidebar caption or select one from the list of sidebar captions. Sidebar captions are what the user sees on the left side of the MAPICS CRM Web site. They are the buttons that load the list view when selected.
9. In the Sidebar Group field, select the sidebar group where you want this list view to be located. If you want to create a new sidebar group, enter the new name in the Sidebar Group field. This designation will control where the button, created in the Sibebar Caption field, will be located.

10. In the URL field, enter the path of the view. For example, if this list displays on your Marketing Home portal, enter **portal/marketingportal.asp**.
11. Click **Finish** to save the view.
12. Go back to the list of list views for the table that you based your view on, and select the new view.
13. Click **Design** to open the List Designer window for the view, and then edit the view as necessary.

Creating a System Detail View

Through a detail view users can adjust data in the selected record, and add new records. A detail view may have multiple tabs.

> NOTE: Many fields must be included on a detail view to be used by the system. For example, on the Contact view, you must include the Company ID field as a hyperlink search type.

See “Adapting System Views” on page 4-6 for an example of creating a new detail view.

Creating a Child List View

A child list view contains information that is related to the selected record in the detail view. The total number of tabs possible in a child list view depends on the record displayed in the detail view.

Before creating a child list view, you need to know the parent-child relationship:

- Tables in this category are parent tables from which child list views can be built.
- Child list views always display below a detail (parent) view. To locate the correct table, you need to think about where it should be located (i.e. what parent it should be associated with).

In the left pane, you select the parent table. The right frame is updated with the child table to be used by the child list view.

As you add columns to the view, they are appended to the end of the table. You can click and drag the columns to different positions in the grid.

And as with list views, you can add fields from related tables.

1. Click **New**. The Create View dialog displays.
2. Select the **Child List** option and click **Next**. The Select Table Template dialog displays.
3. In the first Table Name field, select the parent detail table that the view is based on. For example, to add a child list view for the Notes child list tab under the Contact detail view, select the **CON_tblContact** table.
4. In the second Table Name field, select the child table the view is based on. In the above example, it would be **NOTE_tblNote**.
5. The system view for the selected table displays in the Template field. Select a system view for the table and click **Next**. The Additional View Information dialog displays.
6. In the View Name field, enter the name of the view, which will be used for reference when switching between multiple views on the same table.
7. In the Caption field, select a caption from the list, or enter a new one. The caption displays at the top of the view in MAPICS CRM.
8. In the Rights field, select the update rights for this view:
   - **Add** - Users can add records to the table, using this view, but they cannot delete them.

- **Delete** - Users can delete records from the table, using this view, but they cannot add them.
- **Both** - Users can both add records and delete them from the table, using this view.
- **Neither** - Users can neither add records to nor delete them from the table, using this view.

NOTE The **Add** and **Delete** rights apply to users who are assigned only to this view. You can have views for the same table where one view restricts users to only adding records and the other view allows users to add and delete records.

9. Click **Finish** to save the view.
10. Go back to the list of child list views for the table that you based the view on, and select the new view.
11. Click **Design** to open the List Designer window for the view, and then edit the view as necessary.

Adding New Fields to Existing Tables

You can add new fields to a table, using SQL Server.

1. Open the SQL Server Enterprise Manager.
2. Go to **Console Root/Microsoft SQL Services/SQL Server Group/ [*Server Name*]/ Databases/[*Database Name*]/Tables**.
3. Click the name of the table you want to add a field to.
4. Right-click the table name, and select **Design Table**.
5. Enter the appropriate data for the new field. You can enter the new field information at the bottom of your current list, or you can insert it into the available list. To insert the data into the available list:
   a. Select the row where you would like to insert the new data.
   b. Right-click the row, and select **Insert Row**. Do not include any spaces in the actual field name. You should reference fields that already exist to get a better idea of the settings for new fields.

      For assistance while working with SQL Server, refer to the SQL Server Books Online.

      The new field(s) can be used immediately in MAPICS CRM, but you must first add them to a view.
6. Close and re-open the View Designer and the Data Manager to activate the new fields.

NOTE You should run the Metadata Integrity Verification utility (MDIV) in the View Designer after making any changes. The MDIV is labeled **Analyze** in the View Designer main window.

Creating Command Buttons on Detail Views

Using the View Designer, you can create command buttons for detail views. A command button enables a user to:

- Launch a Web page or ASP page in the internal browser.
- Launch a local executable program or batch file on the client machine.

In both of these cases, any field values defined on the current Detail tab can be passed as parameters to the target ASP page or executable program.

These different command targets have different requirements for parameter formatting. The command button has two argument types: **Parameter**, which is typically used for ASP pages, and **Free Form**, which is typically used for executable programs.

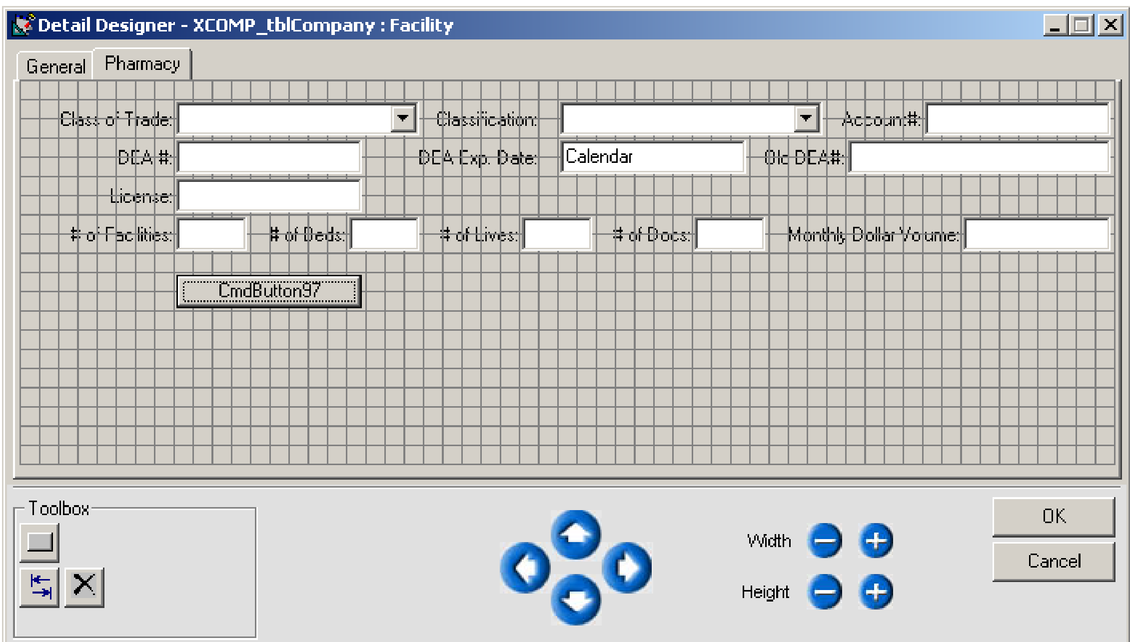
To add a command button:

1. Select the detail view you want to modify.

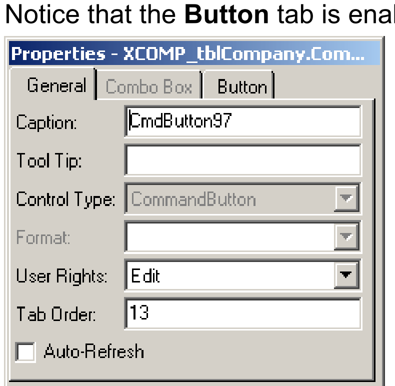
You cannot add command buttons to System detail views.

2. Right-click the view, and select **Design** to display the Detail Designer.

The following example shows a custom company detail view with a command button named **CmdButton97**.



3. Place the command button on the detail view by clicking the in the Toolbox area. You can place the command button anywhere on the detail view.
4. After you have placed the command button, click it to display the Properties dialog. Notice that the **Button** tab is enabled. This tab is enabled only for command buttons.

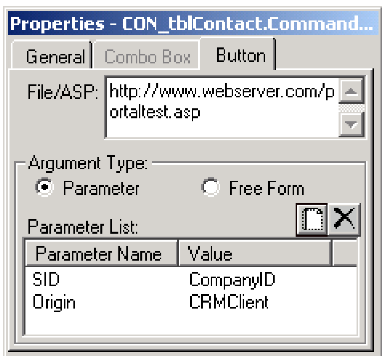


5. In the Caption field under the General tab, enter the name of the command button.

6. In the Tool Tip field, enter any tips to be displayed for the button.
7. In the User Rights field, select one of these options:
   - **Edit** - If the detail view is open, the field is editable by any user who is assigned the view.
   - **EditifAO** - If the detail view is open, the field is editable only by the account owner.
   - **EditifNew** - When a new record is created, on the detail view pop-up, the field is editable only if the record is new. If the record is opened in the detail view, the user cannot edit the field value.
   - **View Only** - The field is view only on a detail view, meaning it is disabled and cannot be changed.
8. In the Tab Order field, enter the buttons tab sequence for setting focus on the button.
9. Click the **Button** tab. Then, see “Launching an Active Server Page” on page 4-14 or “Launching an Executable Program” on page 4-15 (whichever is applicable) for additional information about completing the button’s properties.

Launching an Active Server Page

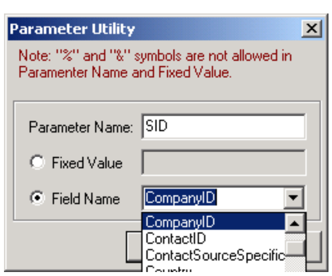
This example shows the Button tab for the Command Button control. This command button has been configured to launch an ASP page.



The Argument Type field is set to **Parameter**, which is the formatting mode that is typically used for ASP pages. It is possible, however, to format the argument type as **Free Form**, even when working with an ASP. See the next procedure for a discussion of the Free Form argument type.

To configure the command button to use ASP files, follow these steps under the Button tab:

1. In the FILE/ASP field, enter the URL of the ASP page.
2. Under Argument Type, select the **Parameter** option.
3. Click to create a new item. The Parameter Utility dialog displays.



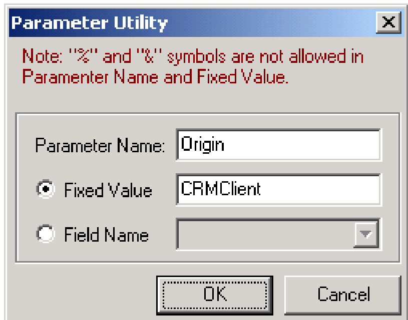
4. In the Parameter Name field, enter the name of the parameter as you would like it to display in the ASP query string.

5. Select the Field Name option, and then select the field. The value of the field you select will be passed as the value of the parameter when the command button is clicked.

   This field must appear on the current detail tab, unless it is the primary key field for the underlying table.

6. Click **OK**.

7. Click again, and enter a parameter name. The Parameter Utility dialog opens.



8. Select the **Fixed Value** option, and enter a string name. This string will be passed as a literal value to the Web page.

9. Click **OK**.

The entries displayed in the previous figures produce the following URL (the SID, or Company ID, will vary depending on which company is selected):

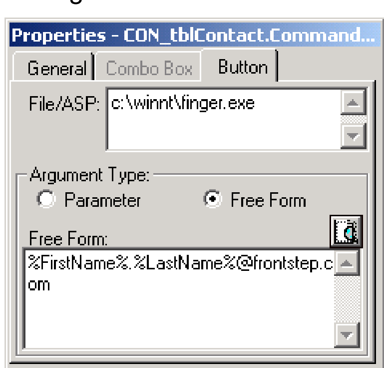
```
http://www.webserver.com/portaltest.asp?SID={05FEC21F-F9BD-11D2-9192-
00902745F754}&Origin=CRMClient
```

Launching an Executable Program

Because ASP pages require the same parameter formatting, the Parameter argument type for a command button works well; however, less uniformity is used among executable programs. For example, some programs expect command-line switches to be preceded with codes, slashes, dashes, etc., or to be comma-separated or quote-delimited.

The Free Form argument type provides the flexibility needed to run different applications from within MAPICS CRM, while still allowing the user to pass control values to the command target. Additionally, you can use this argument type when accessing ASP pages, if special formatting is needed; for example, constructing a single parameter from two fields.

This figure shows the Button tab for launching an executable.



To configure this button for executable programs, follow these steps:

1. In the File/ASP field, enter the path and name of the executable as it will be set up on the client computer.

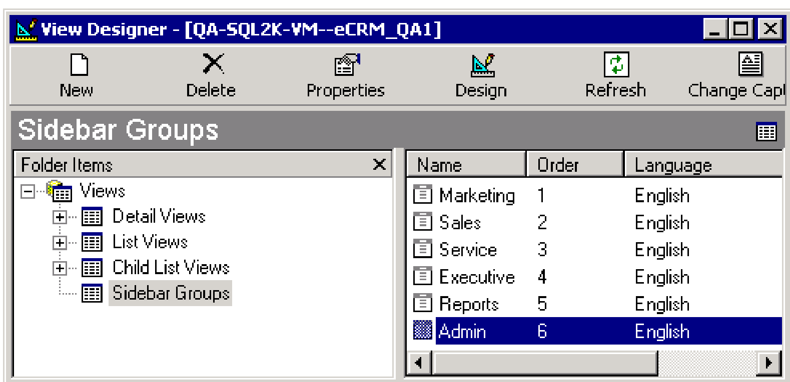
2. Under Argument Type, select the **Free Form** option.
3. In the Free Form field, enter the format string. The rules for the format string are:
    - Any characters between two percentage (%) signs will be interpreted as a field name. When the executable is called, the field name and percentage signs will be replaced with the value of the named field. A string that is between two percentage signs, but is not the name of a field on the current Detail tab, will result in an error.
    - Any characters that are not between two percentage signs will be passed to the executable as literal values.
    - If you need to send a percentage sign to the executable as part of the format string, place two percentage signs (%%) next to each other, with no spaces in between. When the executable is called, a single percentage sign will be sent.

The examples displayed in the previous figures in this procedure produce the following command string (the user name will vary depending on the values on the current detail tab):

c:\winnt\finger.exe john.doe@example.com

Maintaining Sidebar Groups

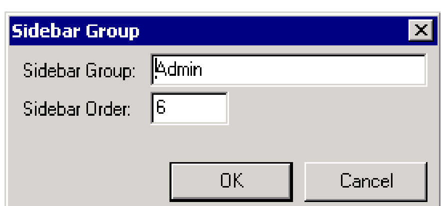
In the Sidebar Group area, you can maintain the list of sidebar groups, and the order in which they display in MAPICS CRM.



Modifying Sidebar Groups

To modify a sidebar group, do the following:

1. Double-click the sidebar name. The Sidebar Group dialog displays.



2. In the Sidebar Group field, enter the new name of the group.
3. If you want to change the order in which this group displays on the sidebar, enter the new order as a numeric value in the Sidebar Order field.

5

Products

This chapter applies to both CRM and Customer Center.

Using the Application Administration Web, you can view and optionally maintain information about the products you sell in CRM. In addition to the product catalog, you can work with:

- Product categories
- Customer item number cross-references
- Optional items
- Interchangeable items

You can also work with your product classification structure, which is discussed in Product Classifications.

> NOTE
>
> Any product information that you add or change in the Application Administration Web does not update your enterprise system. In addition, the next time product data synchronization occurs between your enterprise system and the Front Office applications, your changes will be overwritten.

Product Catalog

Usually, you will populate the CRM/Customer Center database with the product catalog from your enterprise system (such as SyteLine), using data synchronization. Then any time product data is modified in your enterprise system, the MAPICS Front Office applications automatically reflect those changes.

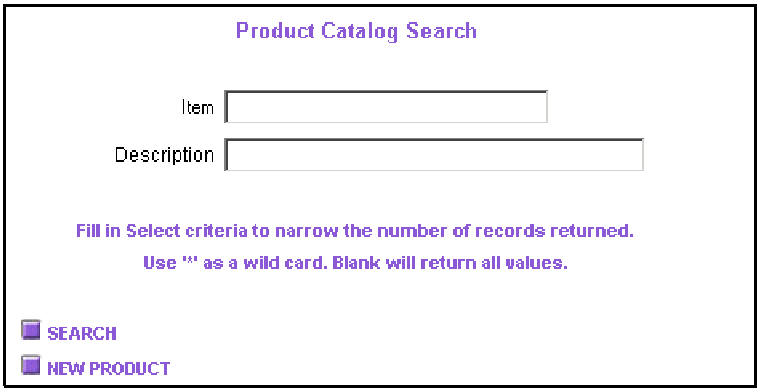
If necessary, you can also manually maintain your product catalog on the Application Administration Web.

> NOTE
>
> Changes made to the product catalog through the Application Administration Web do not update your enterprise system. You will need to modify the product data in your enterprise system to make the changes permanent.
>
> Typically, you will use the Application Administration Web to maintain product data only if you need to make a temporary change, or if you are using CRM standalone.

Accessing the Product Catalog

1. On the Application Administration Web, click the **Product** tab.

2. On the sidebar, click **Product Catalog**. The Product Catalog Search page displays.

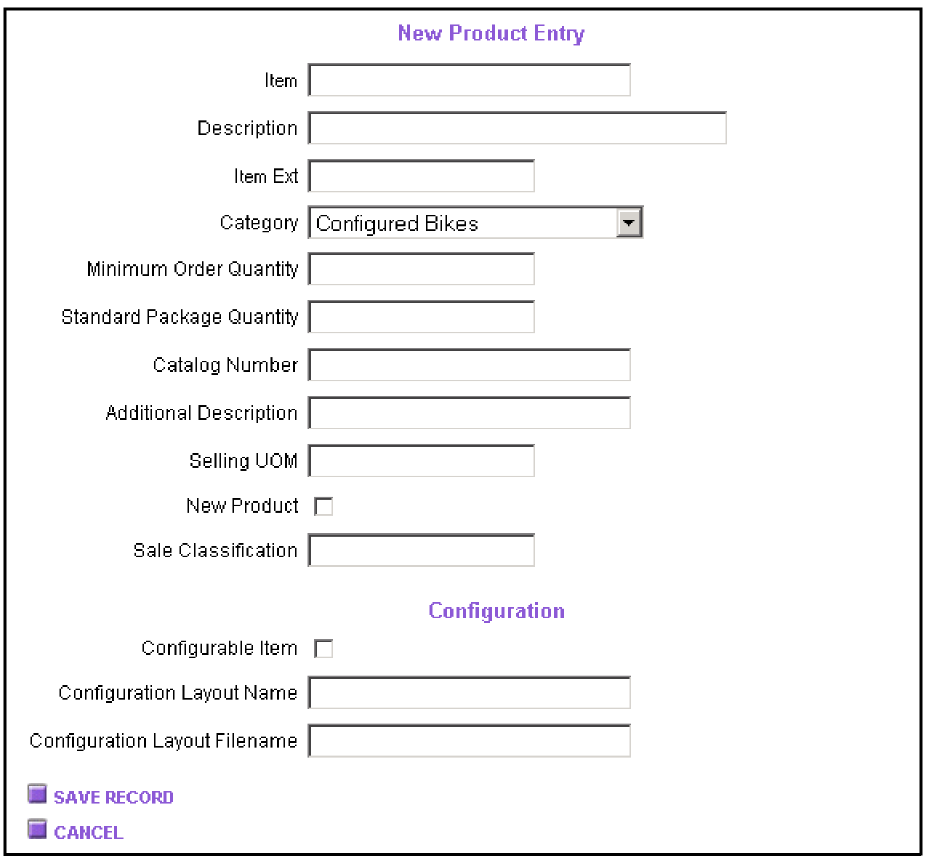


Adding a Product

Although you can use the Application Administration Web to add a product to the catalog, the item will not be added to your enterprise system. If you want to permanently add the product to the system, we recommend that you set it up in your enterprise system; the data synchronization process will then automatically add it to the CRM database.

NOTE: If you are using CRM standalone, you will need to manually add all your products to the catalog.

1. In the Product Catalog Search page, click **NEW PRODUCT**. The New Product Entry page displays.



2. Fill in information in the following fields:
   - Item - Enter a unique item number for the product.

- Description - Enter the description of the product.
- Item Ext - If you use an extended item number in your product IDs (such as a manufacturer code), enter the item number extension for this product.
- Category - Select the category to which the product belongs. In the Front Office applications, you can filter products by their categories.
- Minimum Order Quantity - Enter the minimum order quantity of the product.
- Standard Package Quantity - Enter the product’s standard packaging quantity.
- Catalog Number - Enter the product’s catalog number, if applicable.
- Additional Description - You can enter additional descriptive information about the product, if necessary. On the CRM Web site, the additional description displays in the Product Additional Details view.
- Selling UOM - Enter the product’s base selling unit of measure.
- New Product - Select this check box if the product is new to your catalog.
- Sale Classification - Enter the product’s sales classification for reference only.

3. If you are adding a configurable item, fill in information in the following fields:
    - Configurable Item - Select this check box to indicate that the item is configurable. If the Order Configuration component is installed, when this product is ordered in CRM, the customer will need to select its configuration options.
    - Configuration Layout Name - Enter the layout name to be used to configure this product, such as **Mountain Bikes**.
    - Configuration Layout Filename - Enter the name of the XML file that contains the configuration layout for this product. Although you can also specify the path where the file is located, we recommend that you use the Order Configuration Registry Update utility to set this path instead. See "Order Configuration,"*MAPICS CRM/ Customer Center Administration Guide* for information about this utility.

    NOTE: Order Configuration is available only when CRM is integrated with SyteLine ERP.

4. Click **SAVE RECORD**.

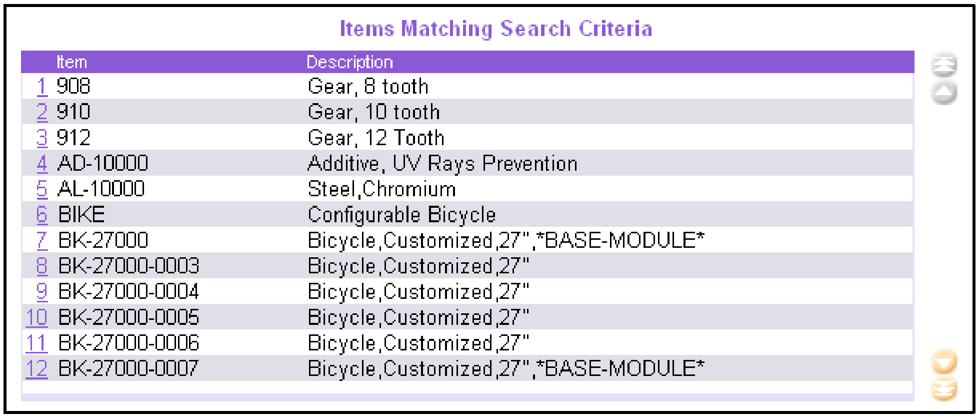
Adding Product Images

Images are added to the \\Clients_0001\ProductCatalog\ProductImages\ directory

Searching for Products

Before you can view and optionally modify information about the products in your catalog, you must first search for the items you want to work with. Follow these steps:

1. In the Product Catalog Search page, fill in information in the following fields:
    - Item - Enter all or part of the item number of the products you want to work with, or leave this field blank to display all products in the catalog.
    - Description - Enter all or part of the description of the products you want to work with, or leave this field blank to display all product descriptions, based on your entry in the Item field.
2. Click **SEARCH**. The lower part of the page is updated with the Items Matching Search Criteria grid, which contains a list of all the products that matched your entries.



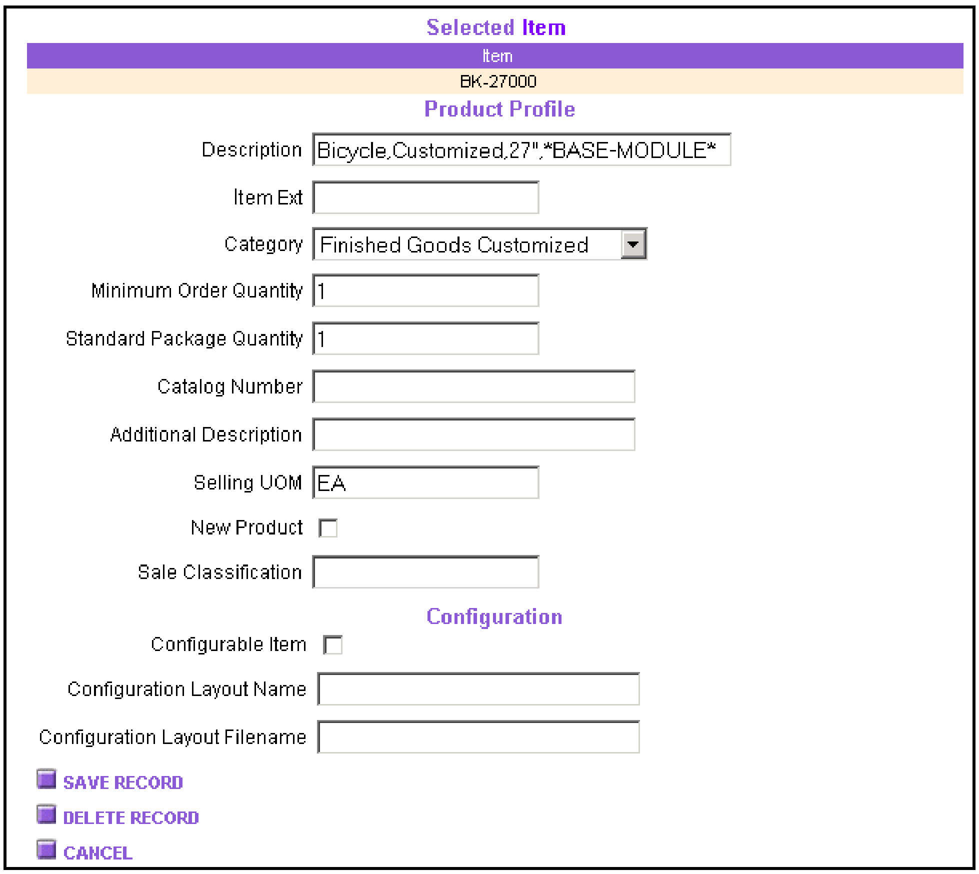
Items Matching Search Criteria

	Item	Description
1	908	Gear, 8 tooth
2	910	Gear, 10 tooth
3	912	Gear, 12 Tooth
4	AD-10000	Additive, UV Rays Prevention
5	AL-10000	Steel,Chromium
6	BIKE	Configurable Bicycle
7	BK-27000	Bicycle,Customized,27",*BASE-MODULE*
8	BK-27000-0003	Bicycle,Customized,27"
9	BK-27000-0004	Bicycle,Customized,27"
10	BK-27000-0005	Bicycle,Customized,27"
11	BK-27000-0006	Bicycle,Customized,27"
12	BK-27000-0007	Bicycle,Customized,27",*BASE-MODULE*

Modifying Product Information

Although you can change information about a product in the Application Administration Web, your enterprise system will not be updated. The next time product data is synchronized between the systems, your changes in CRM will be overwritten. You should use the Application Administration Web to make only temporary changes to product data—or if you are using CRM standalone.

1. If you have not already done so, search for the products you want to work with.
2. In the left-most column of the Items Matching Search Criteria grid, click the link of the product you want to work with. The Selected Item page displays.



3. You can change information in the following fields:
   - Description - Enter the description of the product.

- Item Ext - If you use an extended item number in your product IDs (such as a manufacturer code), enter the extension for this product.
- Category - Select the category to which the product belongs. In CRM, you can filter products by their categories.
- Minimum Order Quantity - Enter the minimum order quantity of the product.
- Standard Package Quantity - Enter the product's standard packaging quantity.
- Catalog Number - Enter the product's catalog number, if applicable.
- Additional Description - You can enter additional descriptive information about the product, if necessary. On the CRM Web site, the additional description displays in the Product Additional Details view.
- Selling UOM - Enter the product's base selling unit of measure.
- New Product - Select this check box if the product is new to your catalog.
- Sale Classification - Enter the product's sales classification for reference only.
- Configurable Item - If this check box is selected, the item is configurable, and the Configuration Layout Name and Configuration Layout Filename fields are accessible. If the Order Configuration component is installed, when this product is ordered in CRM, the customer will need to select configuration options.

  If this check box is not selected, the Configuration Layout Name and Configuration Layout Filename fields are inaccessible; you can, however, select this check box to activate them, indicating that the item is configurable. Note that Order Configuration is available only when CRM is integrated with SyteLine ERP.
- Configuration Layout Name - Enter the layout name to be used to configure this product, such as **Mountain Bikes**.
- Configuration Layout Filename - Enter the name of the XML file that contains the configuration layout for this product. Although you can also specify the path where the file is located, we recommend that you use the Order Configuration Registry Update utility to set this path instead. See "Order Configuration," for information about this utility.

4. If you made changes, click **SAVE RECORD** to save them.

Deleting a Product

Although you can delete a product from within the Application Administration Web, your enterprise system will not be updated. The next time product data is synchronized between systems, the product will be added back to CRM. Therefore, you should use your enterprise system to permanently delete items.

1. If you have not already done so, search for the products you want to work with.
2. In the left-most column of the Items Matching Search Criteria grid, click the link of the product you want to delete. The Selected Item page displays with the product's profile.
3. Click **DELETE RECORD**.

Product Categories

By organizing your products into categories, you can use the categories to filter product data in CRM.

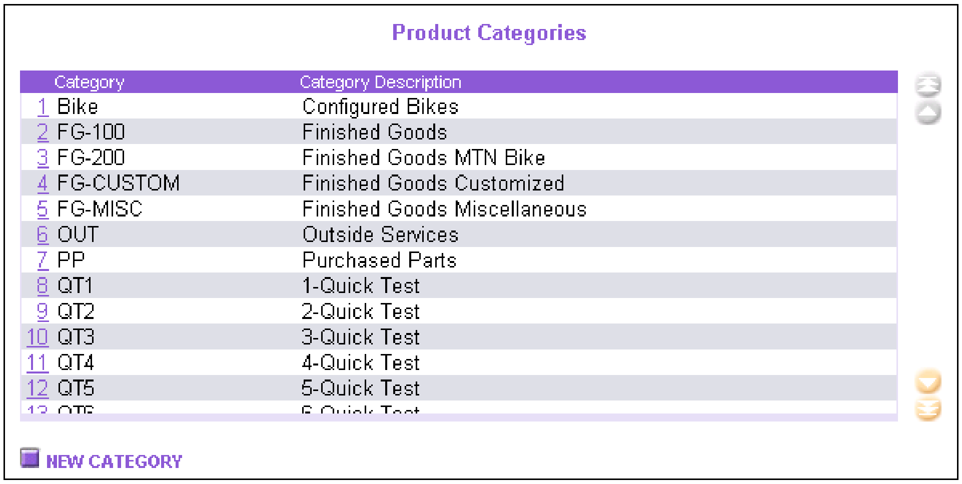
Usually, you will populate CRM with the product categories from your enterprise system (such as SyteLine), using data synchronization. Then any time product data is modified in your enterprise system, CRM is automatically updated with those changes.

If necessary, you can also manually maintain product categories on the Application Administration Web.

> **NOTE**
>
> Changes made to product categories through the Application Administration Web do not update your enterprise system. You will need to modify the data in your enterprise system to make the changes permanent.
>
> Typically, you will use the Application Administration Web to maintain product categories only if you need to make a temporary change, or if you are using CRM standalone.

Accessing Product Categories

1. On the Application Administration Web, click the **Product** tab.
2. On the sidebar, click **Product Category**. The Product Categories page displays.



Product Categories

	Category	Category Description
1	Bike	Configured Bikes
2	FG-100	Finished Goods
3	FG-200	Finished Goods MTN Bike
4	FG-CUSTOM	Finished Goods Customized
5	FG-MISC	Finished Goods Miscellaneous
6	OUT	Outside Services
7	PP	Purchased Parts
8	QT1	1-Quick Test
9	QT2	2-Quick Test
10	QT3	3-Quick Test
11	QT4	4-Quick Test
12	QT5	5-Quick Test
13	QT6	6-Quick Test

NEW CATEGORY

Defining Product Categories

Although you can use the Application Administration Web to add a product category, the record will not be added to your enterprise system. If you want to permanently add the product category to the system, we recommend that you set it up in your enterprise system; the data synchronization process will then automatically add it to CRM.

If you are using CRM standalone, you will need to manually add all your product categories.

1. In the Product Categories page, click **NEW CATEGORY**. The New Category Entry page displays.
2. Fill in information in the following fields:
   - Category Code - Enter a unique code for this category.
   - Category Description - Enter a description of the category. It will display in selection lists for the category in CRM.
   - Display in Product Catalog - Select this check box to indicate whether you want to display products from that category in the product catalog. The default value is the check box selected. If you clear the check box, items in this category will not display in the product catalog or be available to add to the shopping cart.

     CRM caches the product catalog. If this value is changed, you will need to unload the IIS cache to reflect any changes. You can either restart IIS or click **Unload** in the virtual directory.
3. Click **SAVE CATEGORY**.

Modifying a Product Category

You can change the description of a product category through the Application Administration Web. Your enterprise system, however, will not be updated; the next time product data is synchronized between systems, your changes in CRM will be overwritten. Therefore, you should use the Application Administration Web to make only temporary changes to a product category, or if you are using CRM standalone.

You can also indicate whether you want the product category to display in the product catalog and shopping cart.

1. In the right-most column of the grid in the Product Categories page, click the link of the category you want to work with. The Selected Category page displays.
2. You may change the following fields:
   - Category Description - Enter the description of the category as you want it to be displayed in selection lists in CRM.
   - Display in Product Catalog - Select this check box to indicate whether you want to display products from that category in the product catalog. The default value is the check box selected.

     CRM caches the product catalog. If this value is changed, you will need to unload the IIS cache to reflect any changes. You can either restart IIS or click unload in the virtual directory.
3. Click **SAVE CATEGORY**.

Deleting a Product Category

Although you can delete a product category from within the Application Administration Web, your enterprise system will not be updated. The next time product data is synchronized between systems, the category will be added back to CRM. Therefore, you should use your enterprise system to permanently delete categories.

1. If you have not already done so, search for the product category you want to delete.
2. In the left-most column of the grid in the Product Categories page, click the link of the category. The Selected Category page displays.
3. Click **DELETE CATEGORY**.

Product Cross-References

CRM is capable of translating customer part numbers into the corresponding items in your product catalog (and vice versa), and presenting optional items, substitute items, and replacement items for purchase.

Usually, you will populate CRM with the product cross-references from your enterprise system (such as SyteLine), using data synchronization. Then any time product data is modified in your ERP system, CRM is automatically updated with those changes.

If necessary, you can also manually maintain product cross-references on the Application Administration Web.

NOTE

Changes made to product cross-references on the Application Administration Web do not update your enterprise system. You will need to modify the data in your enterprise system to make the changes permanent.

Typically, you will use the Application Administration Web to maintain product cross-references only if you need to make a temporary change—or if you are using CRM standalone.

Customer Item Numbers

When placing orders, your customers may refer to the products by their own item numbers. Rather than requiring your customers to memorize your company's part numbers, you can use the Application Administration Web to create cross-references between them.

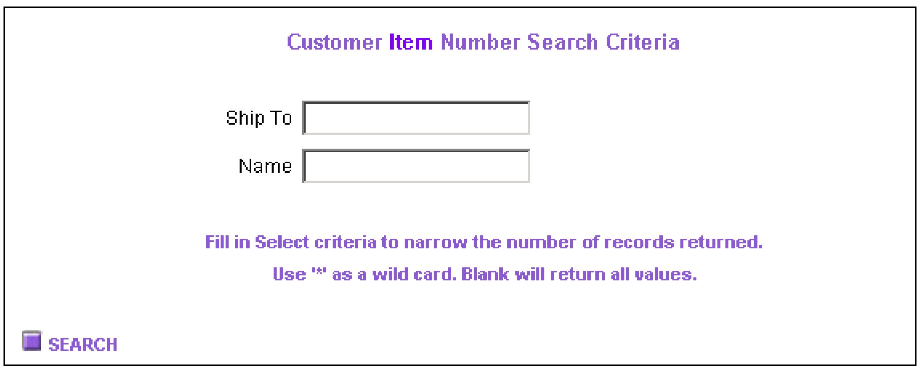
If customer-specific item numbers have been defined for an account, the following occurs when you are working with that account on the CRM Web site:

- The product catalog shows both the supplier and the customer's item numbers
- Products added to the shopping cart show the customer's item numbers, if defined; otherwise, the supplier item numbers display
- Products added to a rapid order, using the supplier item IDs, are automatically converted to the customer's item numbers, if defined
- Products added to an order pad show the customer's item numbers, if defined; otherwise, the supplier item numbers display

Therefore, you can reference an item by either its supplier or customer item number.

Accessing Customer Item Numbers

1. On the Application Administration Web, click the **Product** tab.
2. On the sidebar, click **Customer Item Number**. The Customer Item Number Search Criteria page displays.

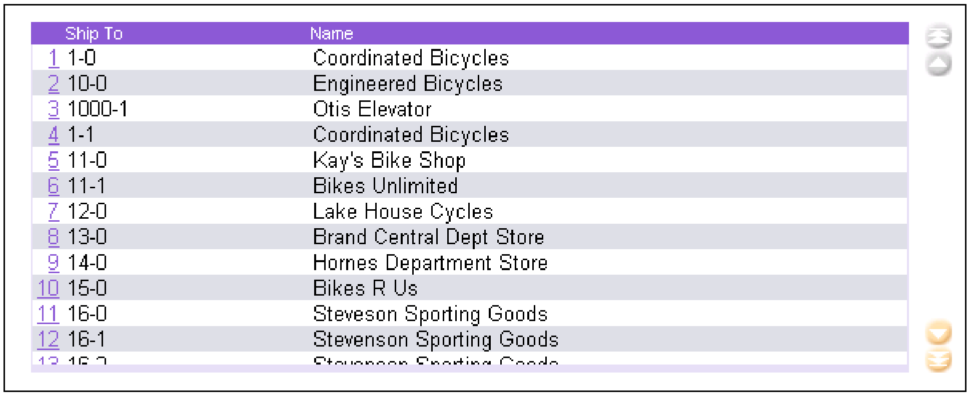


Searching for a Customer

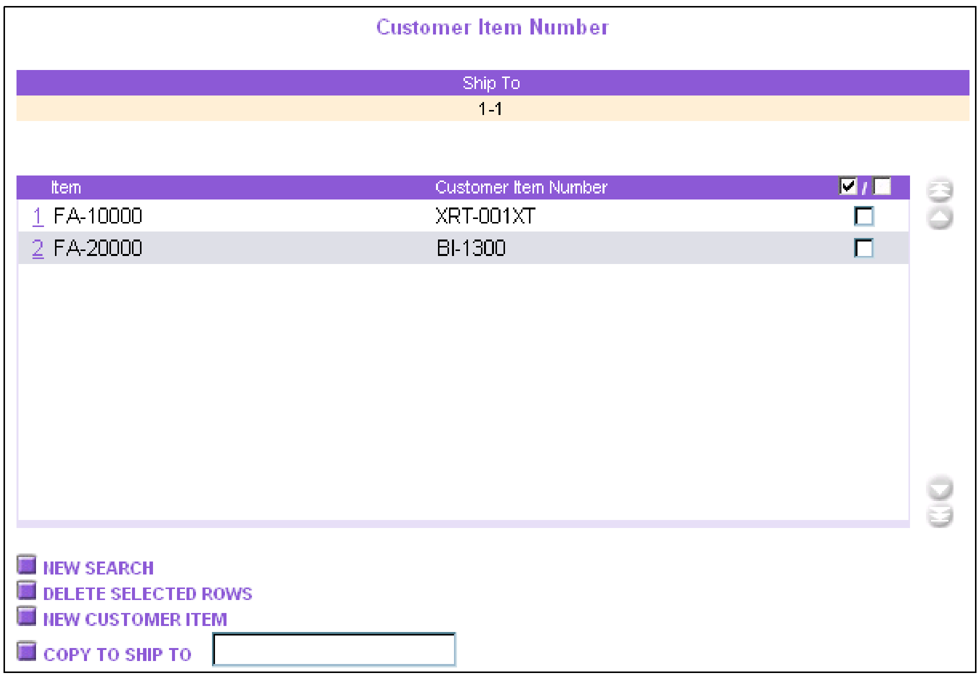
Before you can begin working with a customer's part numbers, you must first search for the ship to location of the customer's account. Follow these steps:

1. In the Customer Item Number Search Criteria page, fill in information in the following fields:
   - Ship To - Enter all or part of the ship to locations you want to work with, or leave this field blank to display all ship to locations that have been set up.
   - Name - Enter all or part of the name of the ship to locations you want to work with, or leave this field blank to display all ship to location names, based on your entry in the Ship To field.

2. Click **SEARCH**. The Customer Item Number page displays with a grid that lists all the matching ship to locations.



3. In the left-most column of the grid, click the link of the ship to location you want to work with. The Customer Item Number page is updated with a list of the products that have customer item numbers defined for this ship to location.

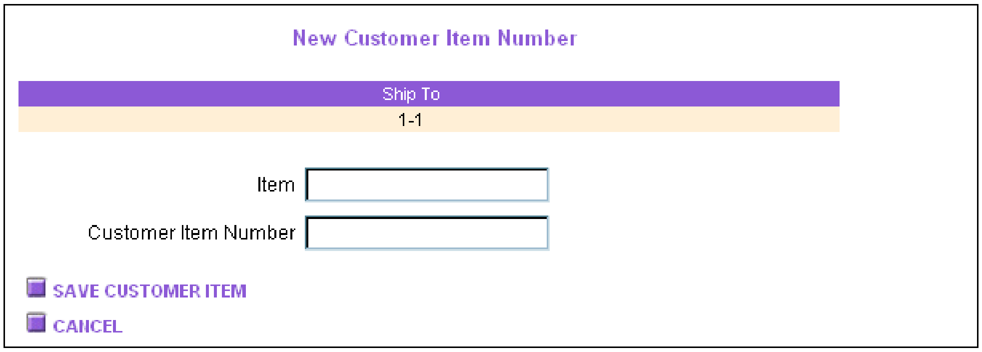


Defining a Customer's Item Numbers

Although you can use the Application Administration Web to add a customer item number, the record will not be added to your enterprise system. If you want to permanently add the record, we recommend that you set it up in your enterprise system; the data synchronization process will then automatically add it to CRM.

If you are using CRM standalone, you will need to manually add all customer item numbers. Follow these steps:

1. After you have selected the ship to location of the customer you want to work with, click **NEW CUSTOMER ITEM**. The New Customer Item Number page displays.



2. Fill in information in the following fields:
   - Item - Enter the item number from your product catalog that you are cross-referencing to the customer's item.
   - Customer Item Number - Enter the customer's item number for this product.
3. Click **SAVE CUSTOMER ITEM**.

Copying Customer Item Numbers to Another Ship To Location

If a customer has multiple ship to locations, and those other locations use the same item numbers to cross-reference to your products, rather than individually setting up the item number cross-references for each ship to location, you can define them for only one location and then copy them to the others.

NOTE

Although you can use the Application Administration Web to copy customer item numbers, these changes will not be added to your enterprise system. If you want to make the changes permanent, we recommend that you make them in your enterprise system; the data synchronization process will then automatically update CRM.

Typically, you will use the Application Administration Web to maintain customer item numbers only if you need to make a temporary change, or if you are using CRM standalone.

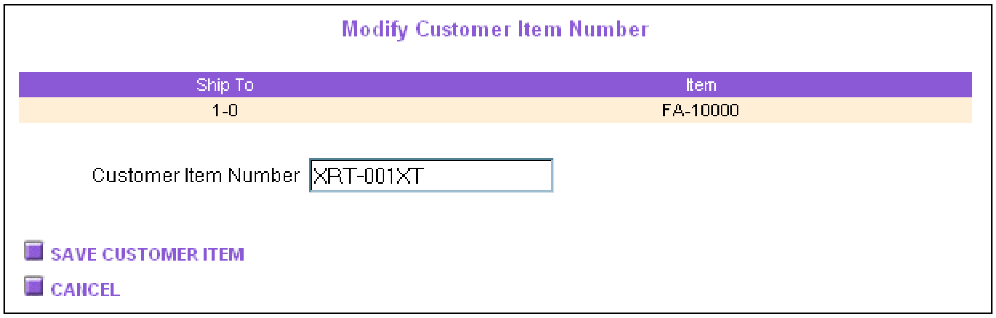
1. Make sure that you have already set up the item numbers for the first ship to location.
2. If necessary, search for the ship to location for which you set them up.
3. In the Customer Item Number page, all the customer's item numbers that have been defined are displayed in the grid. In the right-most column of the grid, select the check box of each item number you want to copy to another ship to location.
4. In the field to the right of the **COPY TO SHIP TO** button, enter the ship to location you want to copy the selected item numbers to.
5. Click **COPY TO SHIP TO**.

Modifying a Customer's Item Number

If necessary, you can change a customer's item number cross-reference; however, your enterprise system will not be updated. The next time product data is synchronized between systems, your changes in CRM will be overwritten. Therefore, you should use the Application Administration Web to make only temporary changes to a customer item number—or if you are using CRM standalone.

1. If necessary, search for the ship to location you want to work with.

2. In the left-most column of the grid in the Customer Item Number page, click the link of the customer's ship to location. The page is updated with a list of the products for which customer item numbers have been defined for this ship to location.
3. In the left-most column of the grid, click the link of the item number you want to change. The Modify Customer Item Number page displays.



4. In the Customer Item Number field, enter the correct item number for the product.
5. Click **SAVE CUSTOMER ITEM**.

Deleting a Customer Item Number

Although you can delete customer item numbers on the Application Administration Web, your enterprise system will not be updated. The next time product data is synchronized between systems, the numbers will be added back to CRM. Therefore, you should use your enterprise system to permanently delete customer item numbers.

1. If necessary, search for the ship to location you want to work with.
2. In the left-most column of the grid in the Customer Item Number page, click the link of the customer's ship to location. The page is updated with a list of the products for which customer item numbers have been defined for this ship to location.
3. For each item number you want to delete, select its corresponding check box in the right-most column of the grid.
4. Click **DELETE SELECTED ROWS**.

Optional Items

CRM provides you with the ability to up-sell and cross-sell products to customers:

- The up-sell feature promotes items of better quality and/or price for selected products, providing customers with the option of upgrading to them. For example, if a a standard toolbox is selected, you could also display a deluxe toolbox.
- The cross-sell feature promotes complementary items to those customers purchase, providing them with the option of also purchasing those items. For example, if paint is ordered, you could also display paintbrushes, rollers, and other painting supplies.

To up-sell and cross-sell products, you simply need to set up the complementary items as optional items for the applicable products. Then when customers order the primary product, they will also have the option of ordering the optional ones.

You can view optional items for products in the following areas:

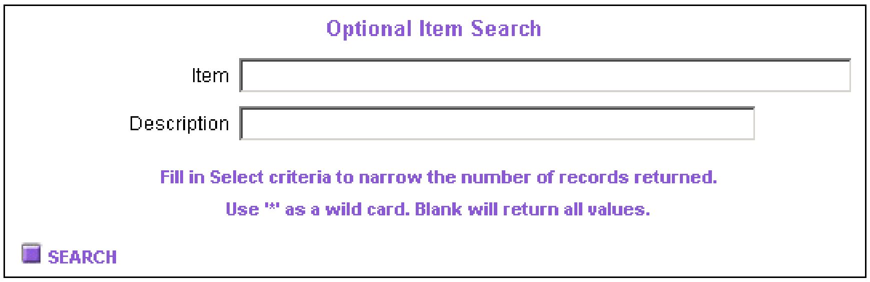
- Product Catalog
- Shopping Cart
- Order Pad
- Rapid Order

If optional items have been defined for a product, will display for that product on the CRM Web site. You can then click this icon to view the product's optional items, and optionally add them to the shopping cart, order pad or rapid order (as applicable).

NOTE: When working with an optional item in CRM, availability displays only from the primary site for the optional item. If MAPICS Supply Chain is installed, when you add the optional item to an order, you will be able to drill down and view its availability for multiple sites.

Accessing Optional Items

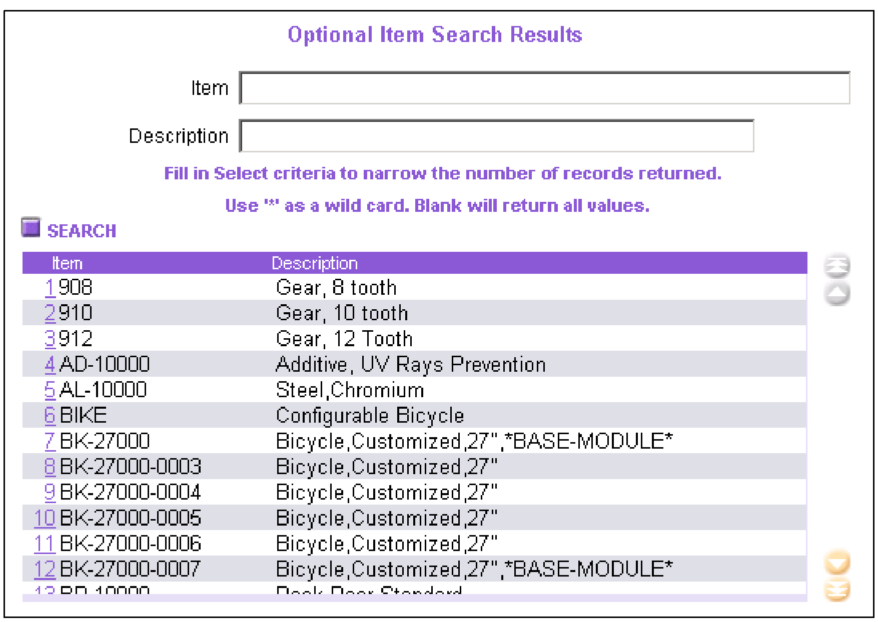
1. On the Application Administration Web, click the **Product** tab.
2. On the sidebar, click **Optional Items**. The Optional Item Search page displays.



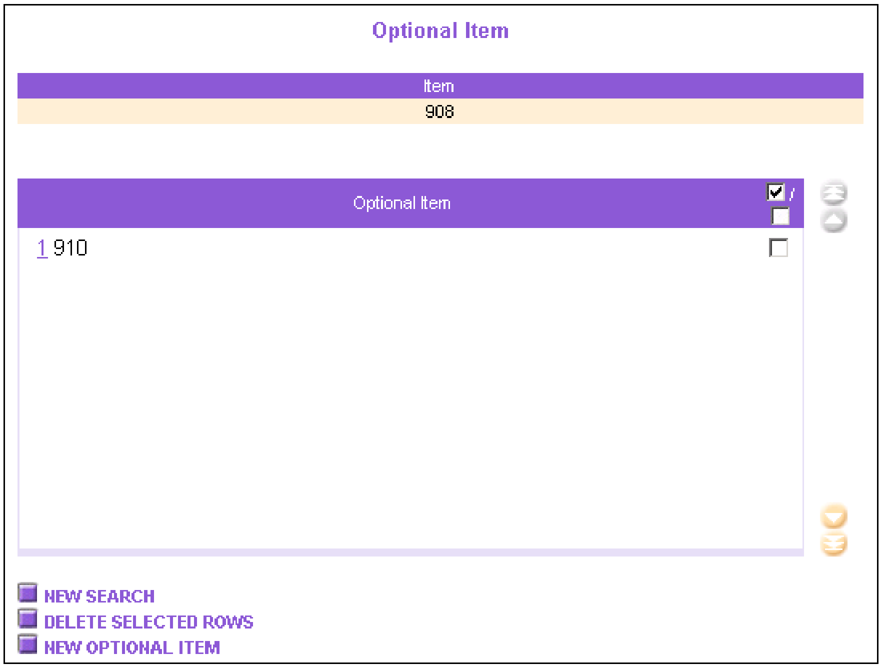
Searching for an Optional Item

Before you can begin working with optional items, you must first search for the product that they apply to. Follow these steps:

1. In the Optional Item Search page, fill in information in the following fields:
   - Item - Enter all or part of the item number of the products you want to work with, or leave this field blank to display all products that are on file.
   - Description - Enter all or part of the description of the products you want to work with, or leave this field blank to display all product descriptions, based on your entry in the Item field.
2. Click **SEARCH**. The Optional Items Search Results page displays with a list of all the products that matched your search criteria.



3. In the left-most column of the grid, click the link of the product you want to work with. The Optional Item page displays, containing a list of all the optional items that have been defined for the selected product.

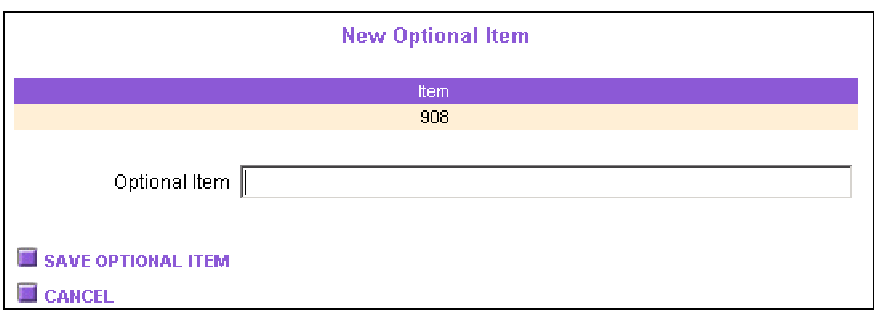


Defining Optional Items

Although you can use the Application Administration Web to add an optional item, the record will not be added to your enterprise system. If you want to permanently add the record to the system, we recommend that you set it up in your enterprise system; the data synchronization process will then automatically add it to CRM.

If you are using CRM standalone, you will need to manually add all optional items. Follow these steps:

1. After you have selected the product you want to work with in the Optional Item Detail grid, click **NEW OPTIONAL ITEM**. The New Optional Item page displays.



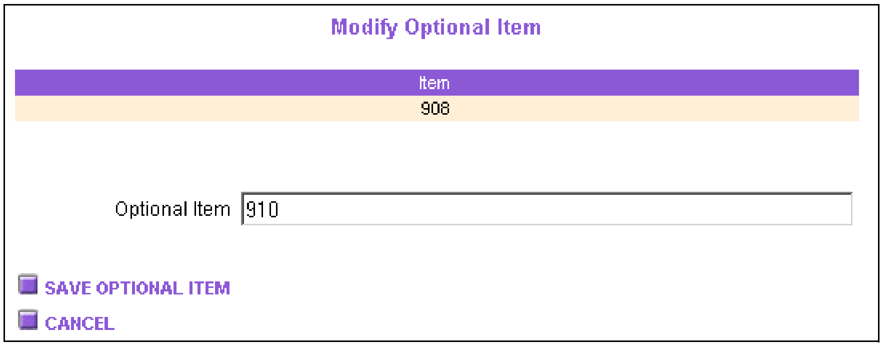
2. In the Optional Item field, enter the number of the optional item for this product. Note that the item must be set up in your product catalog.
3. Click **SAVE OPTIONAL ITEM**.

NOTE You must reboot the Web server for newly added optional items to be available on the CRM Web site.

Modifying an Optional Item Number

If necessary, you can change an optional item number that is cross-referenced to a product. Your enterprise system, however, will not be updated; the next time product data is synchronized between systems, your changes in CRM will be overwritten. Therefore, you should use the Application Administration Web to make only temporary changes to optional items—or if you are using CRM standalone.

1. If necessary, search for the product whose optional items you want to work with.
2. In the left-most column of the grid in the Optional Item Search Results page, click the link of the product you want to work with. The Optional Item page displays.
3. In the left-most column of the grid, click the link of the item you want to change. The Modify Optional Item page displays.



4. In the Optional Item field, enter the correct item number for the optional product. Note that the item must be set up in your product catalog.
5. Click **SAVE OPTIONAL ITEM**.

Deleting an Optional Item

Although you can delete a product's optional item from within the Application Administration Web, your enterprise system will not be updated. The next time product data is synchronized between systems, the record will be added back to CRM. Therefore, you should use your enterprise system to permanently delete optional items.

1. If necessary, search for the product whose optional items you want to work with.
2. In the left-most column of the grid in the Optional Item Search Results page, click the link of the product you want to work with. The Optional Item page displays.
3. A list of all the optional items you have defined for the selected product is displayed. For each optional item cross-reference you want to delete, select its corresponding check box in the right-most column of the grid.
4. Click **DELETE SELECTED ROWS**.

Interchangeable Items

You may have products in your catalog that can be sold as a substitute or a replacement for another product. In such cases, you can set up cross-references for these interchangeable items, using the Application Administration Web.

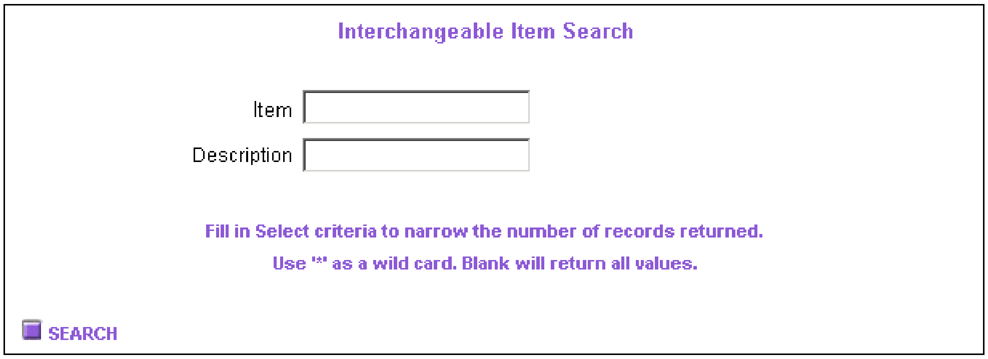
On the CRM Web site, you can view interchangeable items for products in the following areas:

- Product Catalog
- Shopping Cart
- Order Pad
- Rapid Order

If interchangeable items have been defined for a product, will be displayed for that product in CRM. You can then click this icon to view the product's interchangeable items, and optionally add them to the shopping cart, order pad or rapid order (as applicable).

Accessing Interchangeable Items

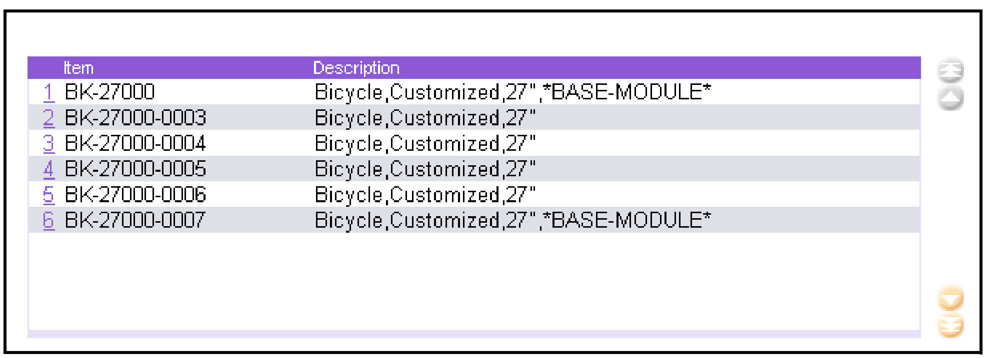
1. On the Application Administration Web, click the **Product** tab.
2. On the sidebar, click **Interchangeable Item**. The Interchangeable Item Search page displays.



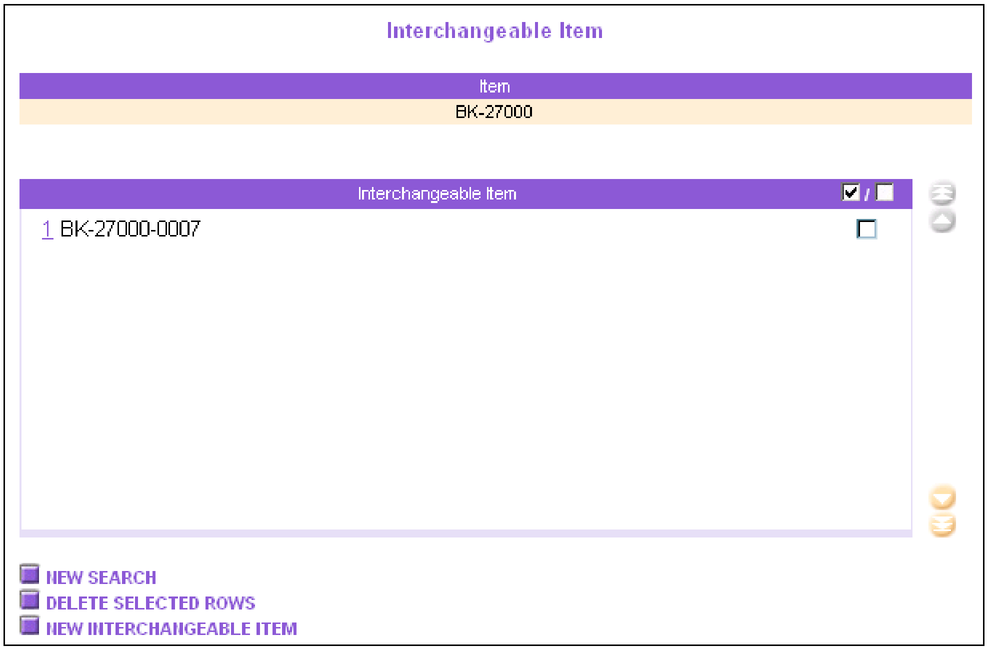
Searching for an Interchangeable Item

Before you can begin working with interchangeable items, you must first search for the product they apply to. Follow these steps:

1. In the Interchangeable Item Search page, fill in information in the following fields:
   - Item - Enter all or part of the item number of the products you want to work with, or leave this field blank to display all products that are set up.
   - Description - Enter all or part of the description of the products you want to work with, or leave this field blank to display all product descriptions, based on your entry in the Item field.
2. Click **SEARCH**. The lower half of the page is updated with a grid, which contains all the products that matched your search criteria.



3. In the left-most column of the grid, click the link of the product you want to work with. The interchangeable Item page displays, containing a list of all the interchangeable items that have been defined for the selected product.

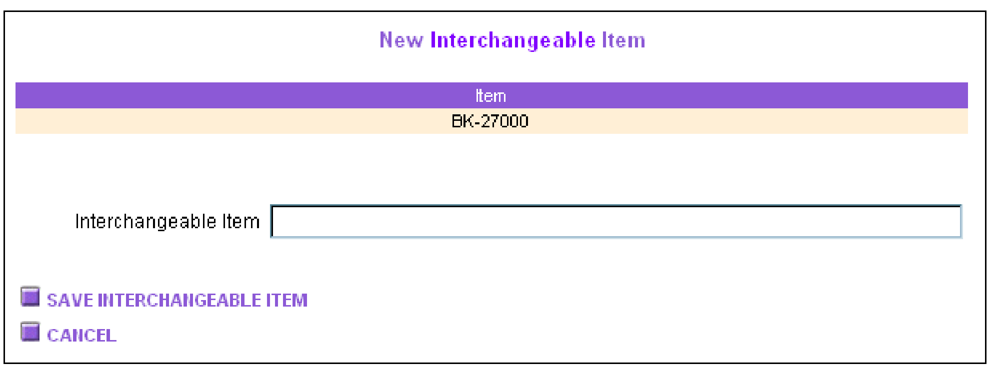


Defining Interchangeable Items

Although you can use the Application Administration Web to add an interchangeable item, the record will not be added to your enterprise system. If you want to permanently add the record to the system, we recommend that you set it up in your enterprise system; the data synchronization process will then automatically add it to CRM.

If you are using CRM standalone, you will need to manually add all interchangeable items. Follow these steps:

1. In the Interchangeable Item page, click **NEW INTERCHANGEABLE ITEM**. The New Interchangeable Item page displays.



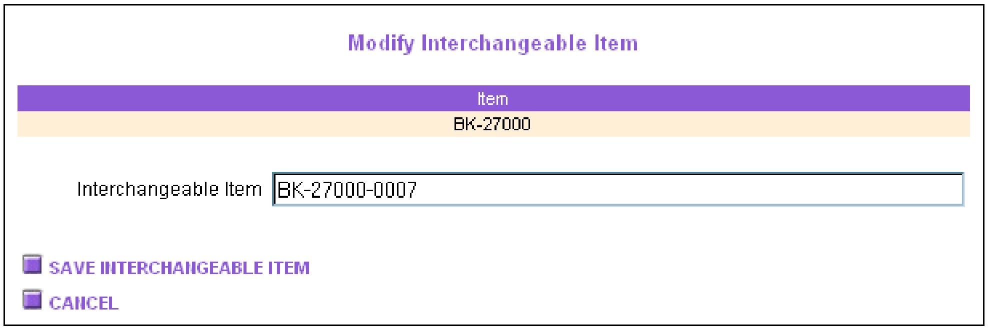
2. In the Interchangeable Item field, enter the number of the interchangeable item for this product. Note that the item must be set up in your product catalog.
3. Click **SAVE INTERCHANGEABLE ITEM**.

You must reboot the Web server for newly added interchangeable items to be available on the CRM Web site.

Modifying an Interchangeable Item Number

If necessary, you can change an interchangeable item number that is cross-referenced to a product. Your enterprise system, however, will not be updated; the next time product data is synchronized between systems, your changes in CRM will be overwritten. Therefore, you should use the Application Administration Web to make only temporary changes to interchangeable items—or if you are using CRM standalone.

1. If necessary, search for the product whose interchangeable items you want to work with.
2. In the left-most column of the grid in the Interchangeable Search Criteria page, click the link of the product you want to work with. The Interchangeable Item page displays.
3. In the left-most column of the grid, click the link of the item you want to change. The Modify Interchangeable Item page displays.



4. In the Interchangeable Item field, enter the correct item number for the interchangeable product. Note that the item must be set up in your product catalog.
5. Click **SAVE INTERCHANGEABLE ITEM**.

Deleting an Interchangeable Item

Although you can delete a product's interchangeable item from within the Application Administration Web, your enterprise system will not be updated. The next time product data is synchronized between systems, the record will be added back to CRM. Therefore, you should use your enterprise system to permanently delete interchangeable items.

1. If necessary, search for the product whose interchangeable items you want to work with.
2. In the left-most column of the grid in the Interchangeable Item Search Criteria page, click the link of the product you want to work with. The Interchangeable Item page displays with a list of all the interchangeable items that have been defined for the selected product.
3. For each interchangeable item cross-reference you want to delete, select its corresponding check box in the right-most column of the grid.
4. Click **DELETE SELECTED ROWS**.

6

Customers

This chapter applies to MAPICS CRM and Customer Center.

Using the Application Administration Web, you can view and optionally maintain information about CRM/Customer Center customers. In addition to customer accounts, you can work with:

- Tax exemption certificates
- Ship to locations

You can also work with your ship to classification structure, which is discussed in Ship To Classifications.

Ship To Tax Exemptions

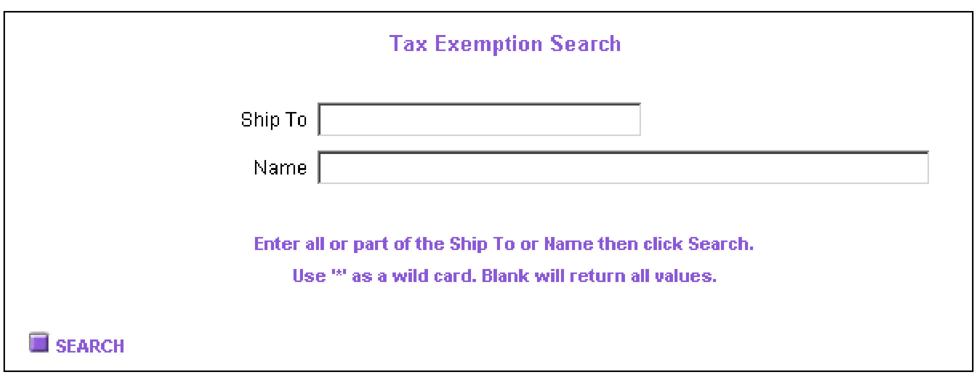
For customers that are exempt from taxes, you need to set up their tax exemption certificate(s) by ship to location so that their orders are correctly processed. You can create as many certificates for a single ship to location as necessary.

Each tax certificate can apply to either the federal or a state/province jurisdiction. For each jurisdiction, you identify the exemption type, effective date range, certificate number, and exemption percentages.

When submitting orders on CRM, you will be prompted for a tax exemption certificate. If you provide a valid one, the certificate record will determine what, if any, taxes will be assessed.

Accessing Ship To Tax Exemptions

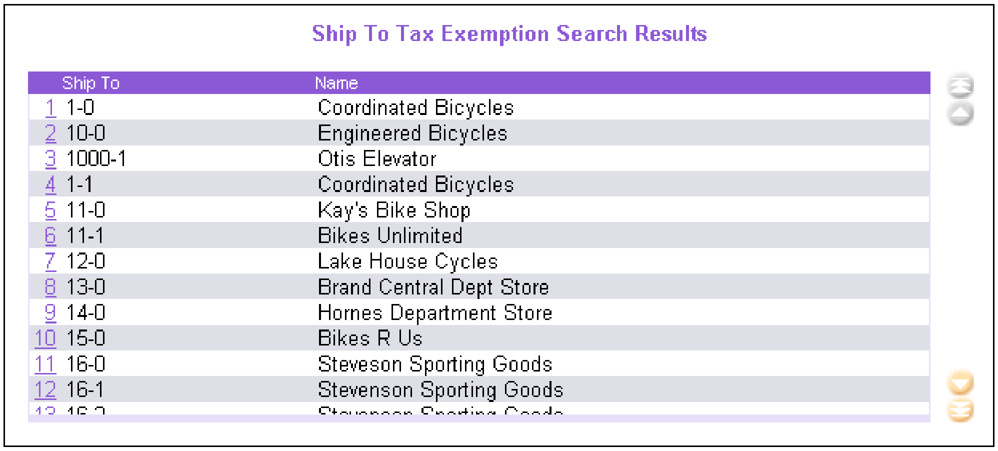
1. On the Application Administration Web, click the **Customer** tab.
2. On the sidebar, click **Ship To Tax Exemption**. The Tax Exemption Search page displays.



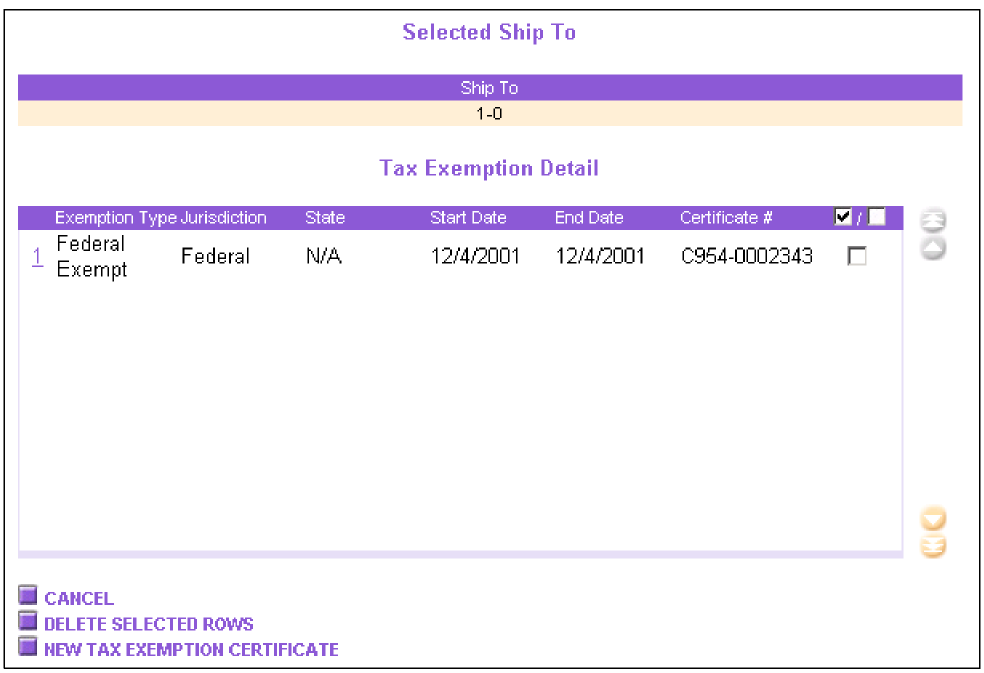
Searching for a Ship To Location from the Tax Exemption Page

Before you can add or modify tax exemption certificates, you must first search for the ship to location you want to work with.

1. In the Tax Exemption Search page, fill in information in the following fields:
   - Ship To - Enter all or part of the ship to IDs you want to work with, or leave this field blank to display all ship to locations that are on file.
   - Name - Enter all or part of the name of the ship to locations you want to work with, or leave this field blank to display all ship to location names, based on your entry in the Ship To ID field.
2. Click **SEARCH**. The lower-half of the page is updated with the Ship To Tax Exemption Search Results grid, containing all the ship to locations that matched your entries.

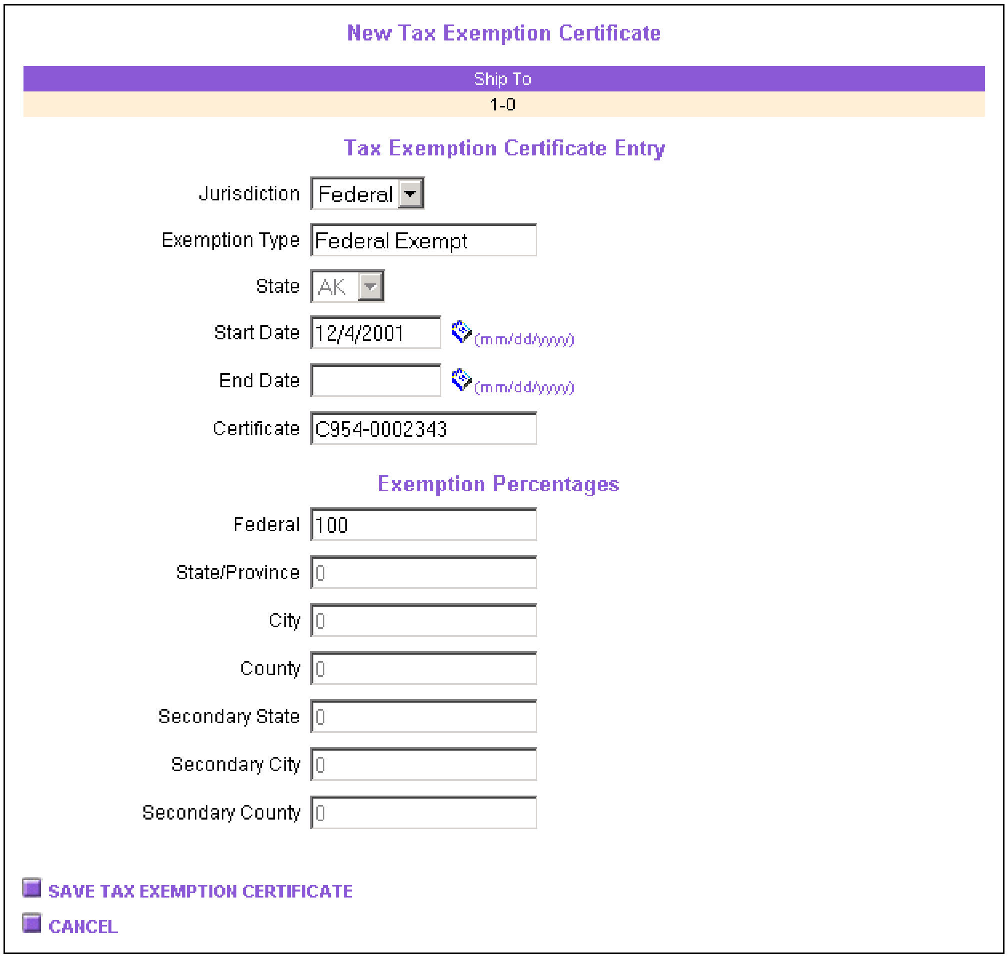


3. In the left-most column of the grid, click the link of the ship to location you want to work with. The Selected Ship To page displays.



Adding a Tax Exemption Certificate for a Ship To Location

1. After you have selected a ship to location to work with, click **NEW TAX EXEMPTION**. The New Tax Exemption Certificate page displays.



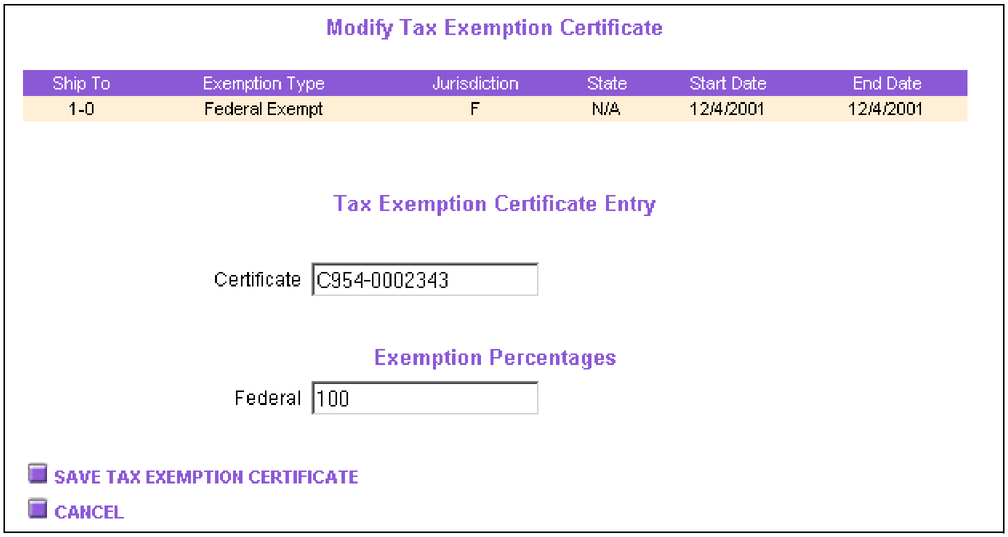
2. Fill in information in the following fields:
   - Jurisdiction - Select the jurisdiction that issued the exemption certificate: **Federal** or **State or Province**.
   - Exemption Type - Identify the customer's exemption type, such as **State Exempt**.
   - State - This field is active only if you selected the **State or Province** jurisdiction option. Select the state or province that issued the exemption certificate.
   - Start Date/End Date - Enter the effective date range of the tax exemption certificate, or click ▼ to select each date from the calendar.
   - Certificate - Enter the number of the customer's tax exemption certificate.
   - Exemption Percentages - Enter the appropriate exemption percentage, up to 100, for each applicable jurisdiction: Federal, State/Province, City, County, Secondary State, Secondary City, Secondary County.

     If you leave a percentage field blank, that field's value will be set to 0.
3. Click **SAVE TAX EXEMPTION CERTIFICATE**.

Modifying a Tax Exemption Certificate

Once you have added a tax exemption certificate, you can modify only its certificate number and exemption percentages.

1. When you select a ship to location to work with, the Selected Ship To page displays.
2. The Tax Exemption Detail grid contains all the tax exemption certificates that have been defined for the selected ship to location. In the left-most column, click the link of the certificate you want to modify. The Modify Tax Exemption Certificate page displays.



3. You can modify the following fields:
   - Certificate - Enter the number of the customer's tax exemption certificate.
   - Exemption Percentages - Enter the appropriate exemption percentage, up to 100 percent, for each displayed jurisdiction: Federal, State/Province, City, County, Secondary State, Secondary City, Secondary County.

     If you leave a percentage field blank, that field's value will be set to 0.
4. Click **SAVE TAX EXEMPTION CERTIFICATE** to save your changes.

Deleting a Tax Exemption Certificate

1. When you select a ship to location to work with, the Selected Ship To page displays.
2. The Tax Exemption Detail grid contains all the tax exemption certificates that have been defined for the selected ship to location. For each certificate you want to delete, select its corresponding check box in the right-most column.
3. Click **DELETE SELECTED ROWS**.

Ship To Maintenance

Most of the ship to information in CRM is populated from your enterprise system, using data synchronization. On the Application Administration Web, you can view the ship to addresses of CRM customers (accounts).

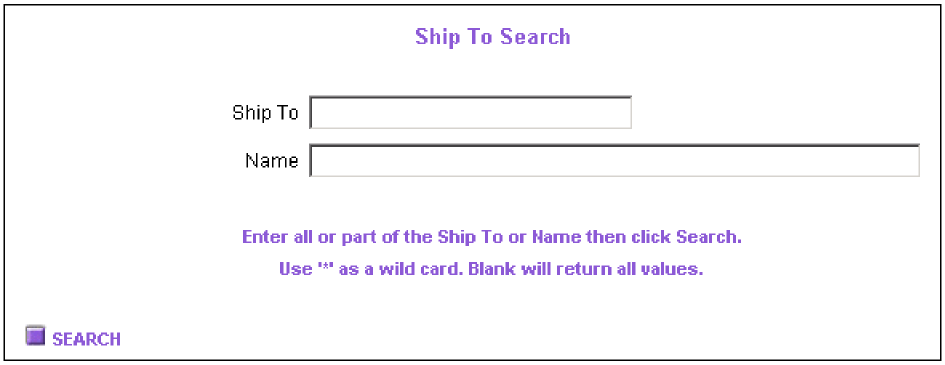
If the "Allow Edit of Bill To / Ship To Record?" environment setting is selected in the System Administration Web, you will also be able to modify the following information for a ship to location:

- E-mail address - Assigns the associated account's login ID for the CRM Web site (only for customer's you want to be able to log in to the Web site).
- Branch - Determines the associated account's main supply site.

- Confirmation rule - Identifies the delivery methods for the associated account's orders.
- Shipping rule - Identifies the shipping methods for the associated account's orders.

Accessing Ship To Locations

1. On the Application Administration Web, click the **Customer** tab.
2. On the sidebar, click **Ship To Maintenance**. The Ship To Search page displays.

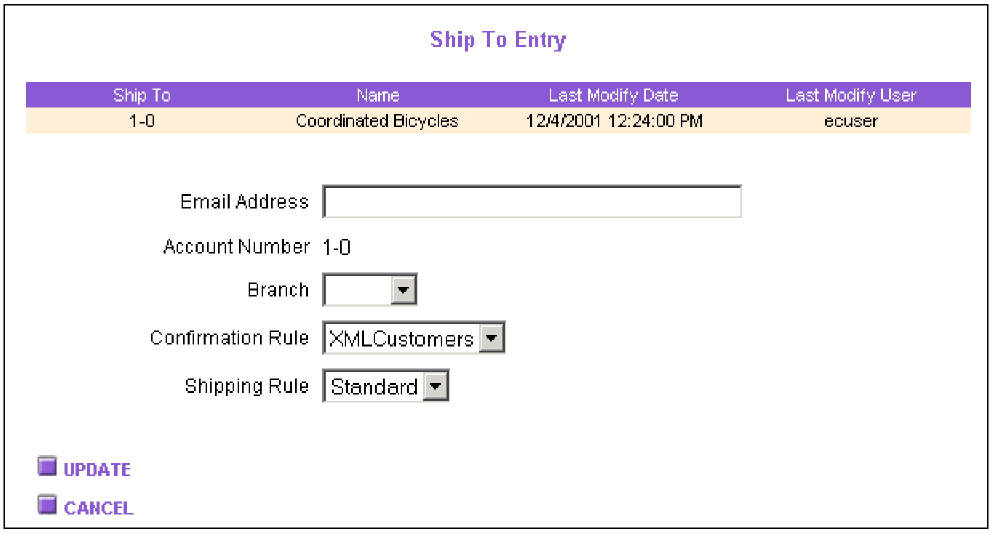


Searching for a Ship To Location from the Ship To Search Page

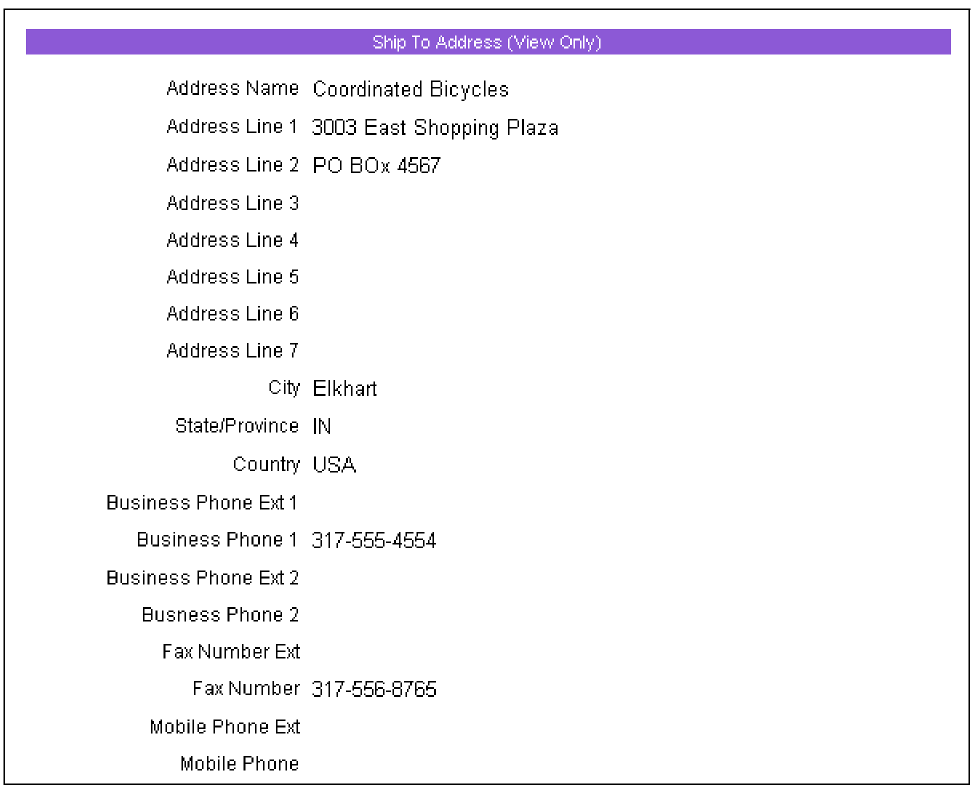
Before you can view ship to information, you must first search for the locations you want to work with. Follow these steps:

1. In the Ship To Search page, fill in information in the following fields:
   - Ship To - Enter all or part of the ship to IDs you want to work with, or leave this field blank to display all ship to locations that are on file.
   - Name - Enter all or part of the name of the ship to locations you want to work with, or leave this field blank to display all ship to location names, based on your entry in the Ship To field.
2. Click **SEARCH**. The lower-half of the page is updated with the Ship To(s) Matching Search Criteria grid, which lists all the ship to locations that matched your entries.

3. In the left-most column of the grid, click the link of the ship to location you want to work with. The Ship To Entry page displays. The upper part of the page contains general information about the ship to location. If the "Allow Edit of Bill To / Ship To Record?" environment setting is selected in the System Administration Web, you will be able to modify the account's e-mail address, branch, confirmation rule and shipping rule (see the next procedure for instructions).



And the lower part of the page contains the address at the ship to location, which you cannot modify.



Maintaining Ship To Location Information

1. When you select a ship to location to work with, the Ship To Entry page displays.
2. You can fill in information only in the following fields:

- Email Address - If the customer at this ship to location can log in to CRM, enter the customer's login e-mail address. (See "Data Manager," for information about customer login IDs.)
- Branch - Select the customer's main supply site.
- Confirmation Rule - Select the rule that will determine which methods can be used to deliver order confirmations to the associated account.
- Shipping Rule - Select the rule that will determine which methods can be used to ship the associated account's orders.

3. Click **UPDATE**.

Account Maintenance

Usually, you will use data synchronization to update CRM with account data from your enterprise system. You can, however, set up and maintain customer accounts on the CRM Web site; the data synchronization process automatically updates your enterprise system with those changes.

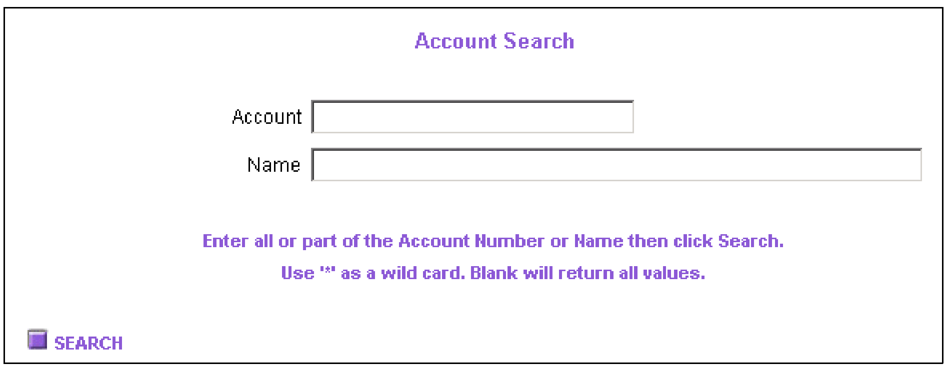
Using the Application Administration Web, you can view information about CRM accounts, including each one's:

- Currency code
- Credit card information, if applicable
- Bill to address and phone numbers

You can also assign a payment rule to an account, which will determine the methods that can be used to pay for that account's orders.

Accessing Accounts

1. On the Application Administration Web, click the **Customer** tab.
2. On the sidebar, click **Account Maintenance**. The Account Search page displays.



Searching for an Account

Before you can view account information, you must first search for the accounts you want to work with. Follow these steps:

1. In the Account Search page, fill in information in the following fields:
   - Account - Enter all or part of the IDs of the accounts you want to work with, or leave this field blank to display all accounts that are on file.
   - Name - Enter all or part of the name of the accounts you want to work with, or leave this field blank to display all account names, based on your entry in the Account Number field.

2. Click **SEARCH**. The lower half of the page is updated with the Account(s) Matching Search Criteria grid, which lists all the accounts that matched your entries.

Account(s) Matching Search Criteria

	Account	Name
1	1-0	Coordinated Bicycles
2	10-0	Engineered Bicycles
3	1000-0	Otis Elevator
4	11-0	Kay's Bike Shop
5	12-0	Lake House Cycles
6	13-0	Brand Central Dept Store
7	14-0	Hornes Department Store
8	15-0	Bikes R Us
9	16-0	Steveson Sporting Goods
10	17-0	Field's Catalog
11	18-0	Twinkles Department Store
12	19-0	H.H. Squash

3. In the left-most column of the grid, click the link of the account you want to work with. The Account Entry page displays. The upper part of the page contains general information about the account. If the "Allow Edit of Bill To / Ship To Records?" environment setting is selected, you can select the account's payment rule in the How Pay Rule field.

Account Entry

Account	Name	Last Modify Date	Last Modify User
1-0	Coordinated Bicycles	12/4/2001 12:49:00 PM	ecuser

Currency Code USD

Credit Card Account No

Check Credit Limit No

Allow Credit Limit Override No

How Pay Rule Charge

UPDATE

CANCEL

And the lower half of the page contains the account's billing address information, which you cannot modify.

Account Address (View Only)

Address Name	Coordinated Bicycles
Address Line 1	3003 East Shopping Plaza
Address Line 2	PO BOx 4567
Address Line 3	
Address Line 4	
Address Line 5	
Address Line 6	
Address Line 7	
City	Elkhart
State/Province	IN
Country	US
Business Phone	317-555-4567
Fax Number	317-556-8765

7

Tools

This chapter applies to MAPICS CRM and Customer Center.

The Tools tab allows you to set up product and ship-to location classifications, currencies, country locations, and batch processing.

Classifications

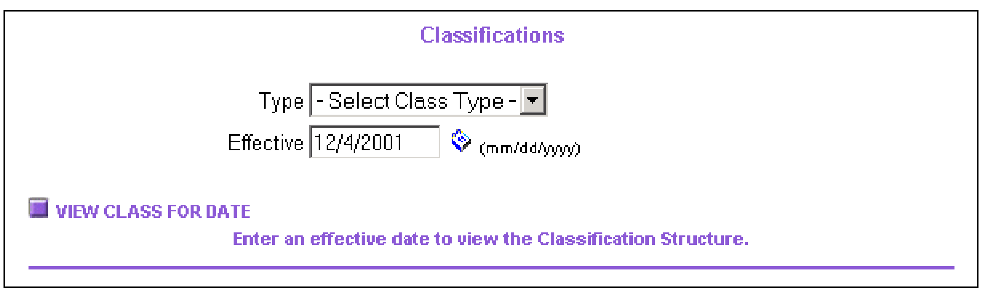
Classifications provide a method of organizing your products and ship to locations. These classes can then be used by MAPICS CRM/Customer Center components for creating a hierarchy.

For example, you might define ship to classifications by region, and then assign ship to locations to them at the lowest level. Next, using the Advanced Pricer you could set up a keyword that has ship to classification as one of its segments, and link the keyword to a pricing agreement. The agreement's pricing would then apply to all ship to locations that are located in a particular region. See the *Active Link Operations Guide* for more information about pricing, keywords and agreements.

NOTE: You will probably need to define classification structures only if you are integrating a MAPICS CRM/Customer Center component that makes use of these structures (such as the Advanced Pricer).

Accessing Classifications

1. On the Application Administration Web, click the **Tools** tab.
2. On the sidebar, click **Classification**. The Classifications page displays.



Adding a Parent Class

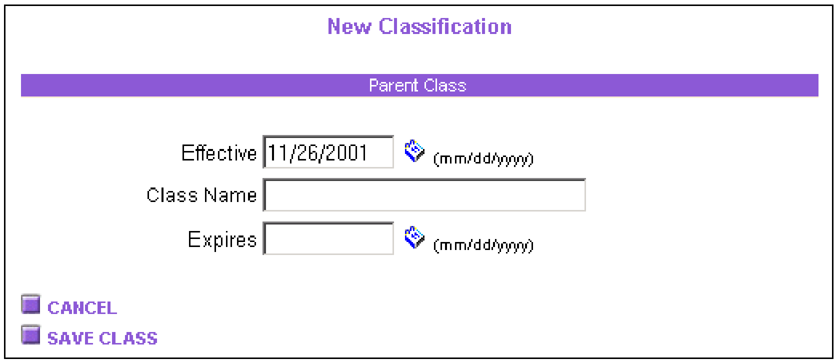
The first step in setting up a classification structure is to create its top level—or parent classes. For example, you might organize all your ship to locations by region (such as East, West, and so on) or all your products by category (such as Computers, Electronics, and so on).

The procedure is essentially the same, regardless of whether you are setting up ship to location or product classes:

1. In the Classifications page, fill in information in the following fields:
   - Type - Select the type of classification you want to add: **Ship To** or **Product**.

- Effective - The current system date is displayed by default, but you can enter a different effective date for the classification, or click to select the date from the calendar.

2. Make sure that nothing is selected in the classification structure (if displayed) in the lower half of the page. Then, click **NEW CLASS**. The New Classification page displays for the selected classification type.



3. Fill in information in the following fields:
    - Effective - The effective date from the Classifications page is displayed, but you can enter a different effective date for the class, or click to select the date from the calendar.
    - Class Name - Enter a unique name for the parent class you are adding.
    - Expires - If you want the class to expire when a particular date is reached, enter that expiration date, or click to select the date from the calendar.
4. Click **SAVE CLASS** to save the parent class.

Once you create the parent classifications, you can access the Product Classifications from the Products tab and the Ship to Classifications from the Customer tab.

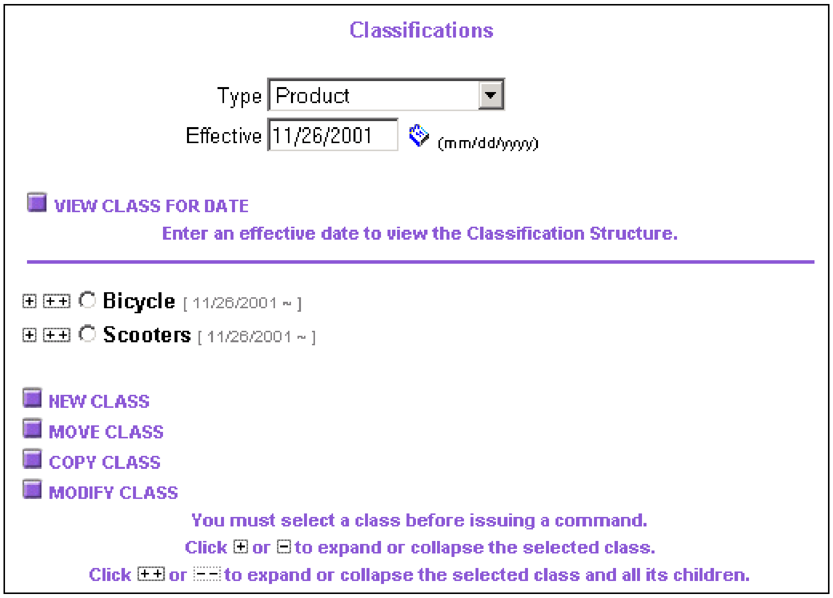
Adding a Child Class

After you have set up the parent classes (top level) in your classification structure, you can begin adding child classes to them.

For example, supposed Computers is a parent class in your product structure. Under this parent class you might define child classes by component, such as Servers, PCs, Memory, and so on.

The procedure for adding a child class is essentially the same as that for adding a parent class, except that you must first select the parent class you want to add the child class to:

1. After you select the classification type and effective date, the structure displays in the lower half of the Classifications page.



2. If a parent class already has child classes defined, + and ++ will be displayed to the left of that parent class. You can click **+** to display the next level in its structure, or click **++** to expand its entire structure.
3. When you locate the level in the structure that you want to add the child class to, simply select the option button for that class, and click **NEW CLASS**. The New Classification page displays.
4. Fill in information in the following fields:
   - Effective - The effective date from the Classifications page is displayed, but you can enter a different effective date for the child class, or click to select the date from the calendar.
   - Class Name - Enter a name for the child class you are adding.
   - Expires - If you want the child class to expire when a particular date is reached, enter that expiration date, or click to select the date from the calendar.
5. Click **SAVE CLASS** to save the child class.

Once you create the child classes, you can access the Product Classifications from the Products tab and the Ship to Classifications from the Customer tab.

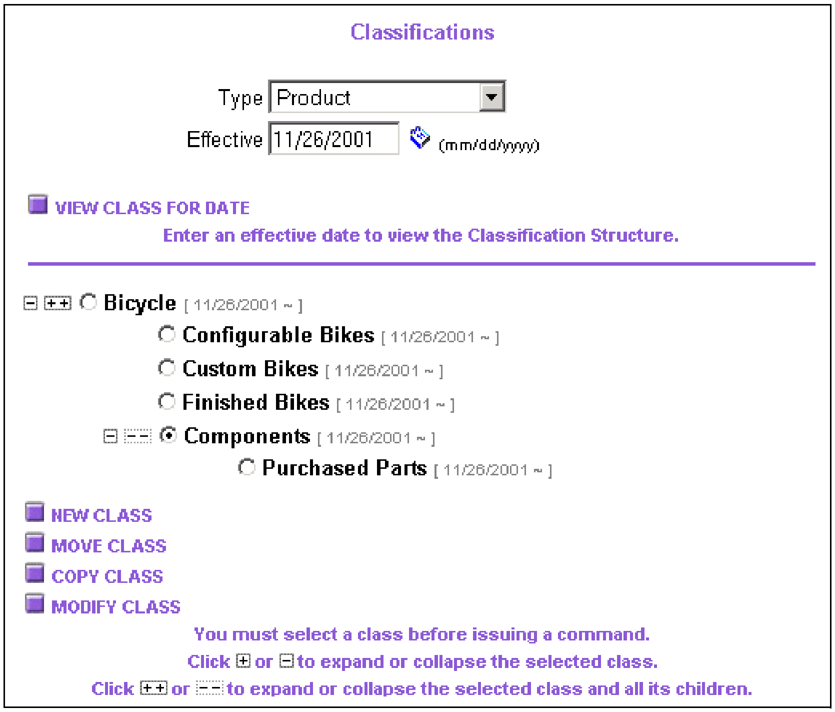
Viewing Classes for an Effective Date

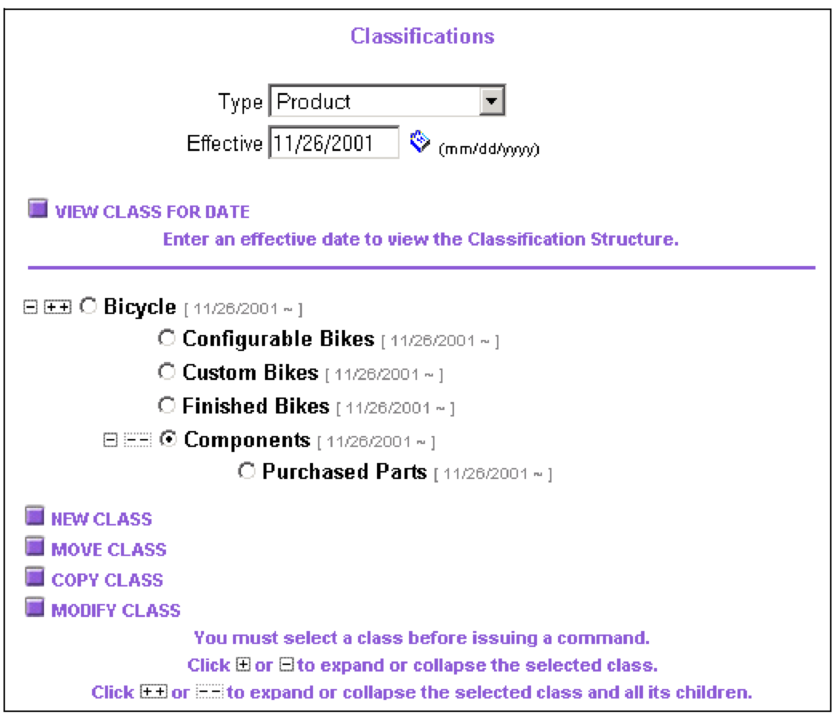
The effective date in the Classifications page determines what displays in the classification structure: if the effective date of a class is later than the date displayed on this page, it will not be included in the structure. Similarly, if the effective date of a class is earlier than the displayed date, it also will not be included in the structure.

To view only those classes that are effective as of a date other than the current system one:

1. Make sure that you have already selected the type of classification structure you want to view. Then in the Effective Date field, enter the effective date of the classes, or click to select the date from the calendar.

2. Click **VIEW CLASS FOR DATE**; the Classifications page is immediately updated with the structure that is in effect for the specified date.





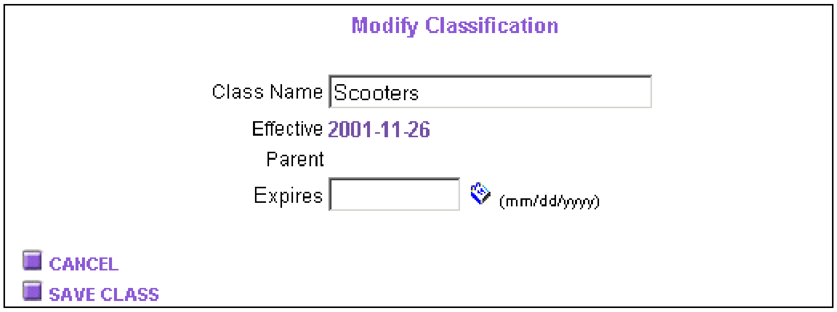
Modifying a Class

Once you have added a class, you can change only its name and expiration date.

1. After you select the classification type and effective date, the structure displays in the lower half of the Classifications page.
2. If you want to modify information about a parent class, simply select the option button for that class.

If you want to modify information about a child class, click **+** next to its parent class to display the next level in the parent's structure, or click **++** to expand its entire structure. Then, select the option button of the child class you want to modify.

3. Click **MODIFY CLASS**. The Edit Classification page displays.



4. You can change information in the following fields:
    - Class Name - Enter the name of the class.
    - Expires - The date that the class is currently set to expire is displayed. You can enter a new expiration date for it, or click to select the date from the calendar.
5. Click **SAVE CLASS** to save your changes.

Copying Classes

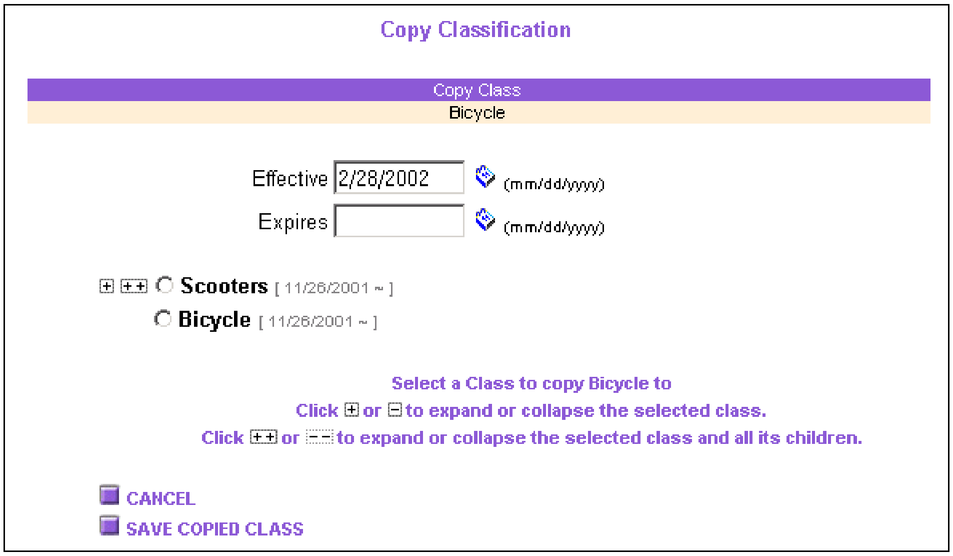
If a class structure you want to set up is the same (or similar to) another one you have already set up, you can copy the existing structure to a new class.

You must have already set up the class you want to copy the structure to.

1. After you select the classification type and effective date, the structure displays in the lower half of the Classifications page.
2. If you want to copy the structure of a parent class, simply select the option button for that class.

    If you want to copy a child class structure, click **+** next to its parent class to display the next level in the parent's structure, or click **++** to expand its entire structure. Then, select the option button of the child class you want to copy.

3. Click **COPY CLASS**. The Copy Classification page displays.



4. Fill in information in the following fields:
   - Effective - The effective date from the Classifications page is displayed, but you can enter a different effective date for all the classes in the structure, or click to select the date from the calendar.
   - Expires - If you want all the classes you are copying to expire when a particular date is reached, enter that expiration date, or click to select the date from the calendar.
5. The top level in the class structure is displayed. If you want to copy the structure to a parent class, simply select the option button for that class.

   If you want to copy the structure to a child class, click **+** next to its parent class to display the next level in the parent's structure, or click **++** to expand its entire structure. Then, select the option button of the child class you want to copy the structure to.
6. Click **SAVE COPIED CLASS** to copy the structure.

Moving Classes

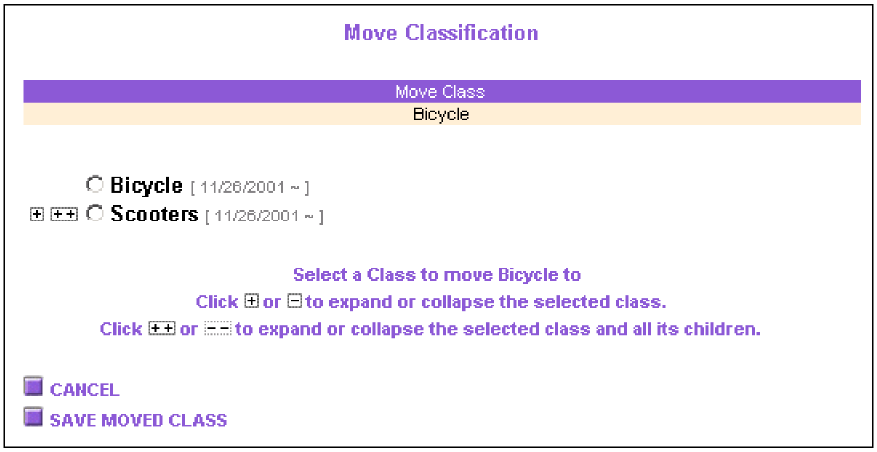
If you set up a structure under the wrong class or need to reorganize a level in your structure without changing the child classes underneath it, you can quickly and easily move the classes to a different level. The effective and expiration dates of the moved classes will remain unchanged.

You must have already set up the class you want to move the structure to.

1. After you select the classification type and effective date, the structure displays in the lower half of the Classifications page.
2. If you want to move the structure of a parent class, simply select the option button for that class.

   If you want to move a child class structure, click + next to its parent class to display the next level in the parent's structure, or click ++ to expand its entire structure. Then, select the option button of the child class whose structure you want to move.

3. Click **MOVE CLASS**. The Move Classification page displays.



4. The top level in the classification structure is displayed. If you want to move the structure to a parent class, simply select the option button for that class.

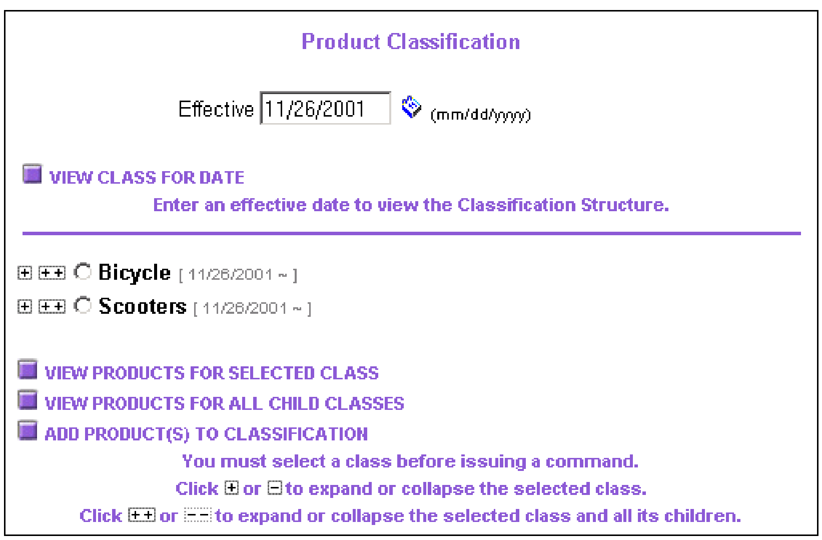
   If you want to move the structure to a child class, click **+** next to its parent class to display the next level in the parent's structure, or click **++** to expand its entire structure. Then, select the option button of the child class you want to move the structure to.

5. Click **SAVE MOVED CLASS** to move the structure to the selected class.

Product Classifications

Accessing Product Classifications

1. On the Application Administration Web, click the **Product** tab.
2. On the sidebar, click **Product Classification**. The Product Classification page displays.



Assigning Products to Classes

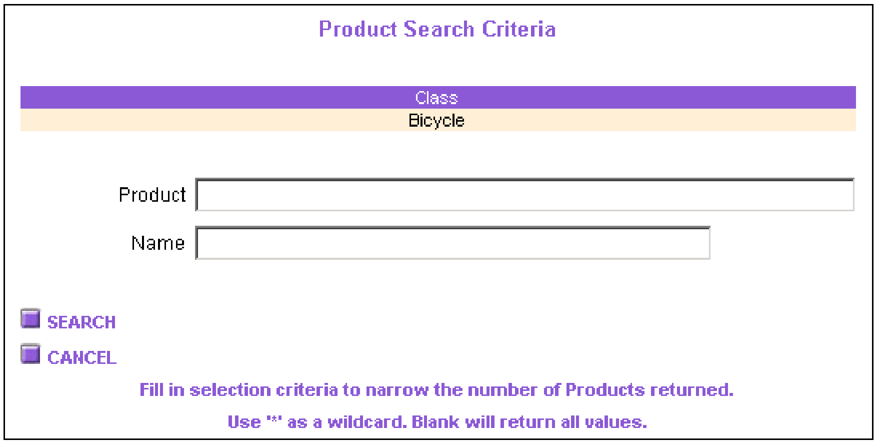
After you have defined your product classification structure, you can begin assigning products to its classes.

1. In the Product Classification page, the current system date is displayed in the Effective field, and the classification structure for that date is displayed in the lower half of the page. If you want to view the structure for a different date, enter the new date, or click to select the date from the calendar.

2. The top level in the product classification structure is displayed. If you want to assign products to a parent class, simply select the option button for that class.

   If you want to assign products to a child class, click **+** next to its parent class to display the next level in the parent's structure, or click **++** to expand its entire structure. Then, select the option button of the child class you want to assign products to.

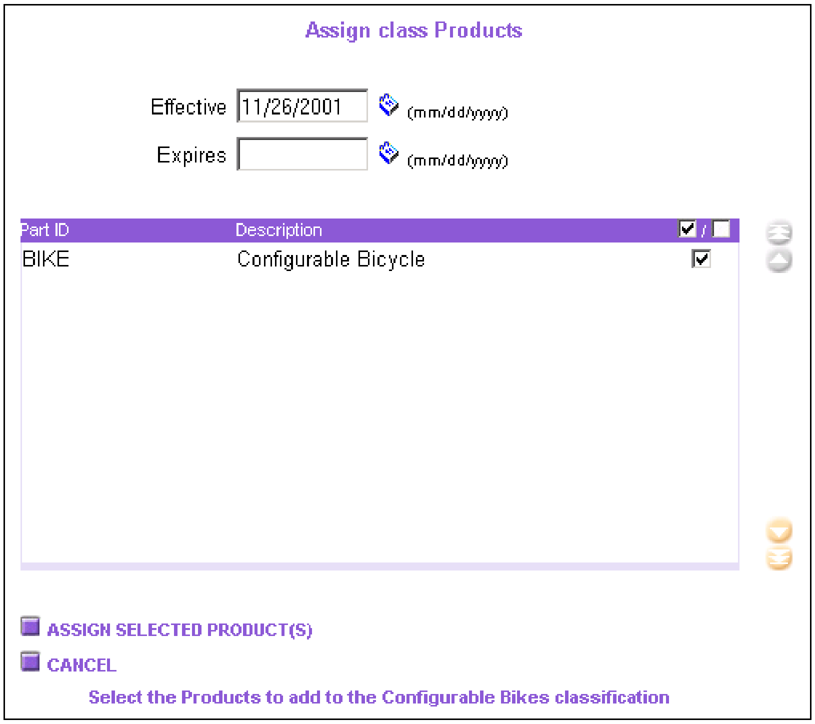
3. Click **ADD PRODUCTS TO CLASSIFICATION**. The Product Search Criteria page displays so that you can search for the products you want to assign to the selected class.



4. Fill in information in the following fields:

   - Product - Enter all or part of the item number of the products you want to work with, or leave this field blank to display all products in the catalog.
   - Name - Enter all or part of the description of the products you want to work with, or leave this field blank to display all product descriptions, based on your entry in the Product field.

5. Click **SEARCH**. The Assign class Products page displays with a list of all the items that matched your entries.



6. Fill in information in the following fields:
   - Effective - The current system date is displayed, but you can enter a different effective date for the products you are assigning to the class, or click to select the date from the calendar.
   - Expires - If you want all the product assignments to expire when a particular date is reached, enter that expiration date, or click to select the date from the calendar.
7. For each item you want to assign to this class, select its corresponding check box in the right-most column.
8. Click **ASSIGN SELECTED PRODUCTS** to assign the products to the class.

Viewing Products Assigned to a Class

1. In the Effective Date field in the Product Classification page, enter the effective date of the classification structure you want to view, or click to select the date from the calendar.
2. Click **VIEW CLASS FOR DATE** to update the lower half of the page with the structure that is in effect on the specified date.
3. The top level in the classification structure is displayed. You can do the following:
   - If you want to view the products that are assigned to a parent class, simply select the option button for that class, and click **VIEW PRODUCTS FOR SELECTED CLASS**.
   - If you want to view the products that are assigned to all child classes under a parent class, select the parent's option button, and click **VIEW PRODUCTS FOR ALL CHILD CLASSES**.

- If you want to view the products that are assigned to a child class, click + next to its parent class to display the next level in the parent's structure, or click ++ to expand its entire structure. Then, select the option button of the child class, and click **VIEW PRODUCTS FOR SELECTED CLASS**.
- If you want to view the products that are assigned to a child class and all child classes under it, click + next to the parent class to display the next level in the parent's structure, or click ++ to expand the entire structure. Then, select the option button of the applicable child class, and click **VIEW PRODUCTS FOR ALL CHILD CLASSES**.

The Products in Classification page displays with a list of all the assigned products.

Assigning an Expiration Date to Products in a Class

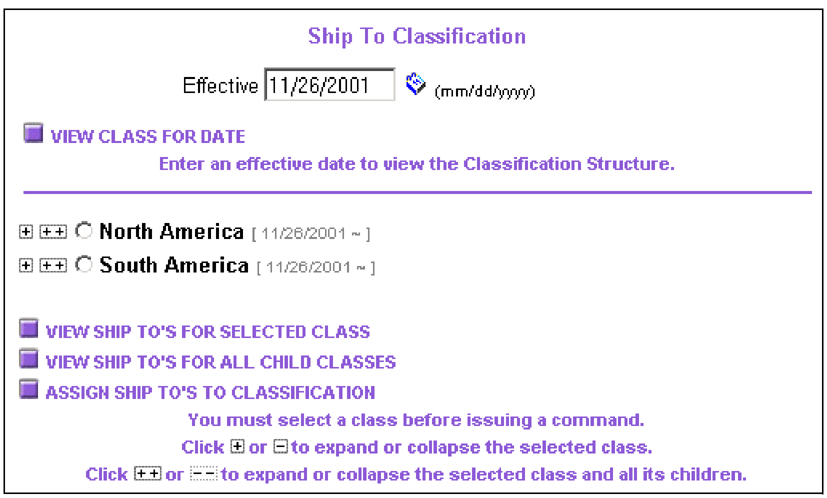
When you are viewing the products that are assigned to a class, you can optionally assign an expiration date to them.

1. In the right-most grid in the Products in Classification page, select the check box in the right-most column for each product that you want to assign the same expiration date to.
2. In the field to the right of the **EXPIRE SELECTED ROWS ON** button, the current system date is displayed. If you want to assign a different expiration date to the selected products, enter the correct date, or click to select the date from the calendar.
3. Click **EXPIRE SELECTED ROWS ON** to assign the expiration date to the selected products.

Ship To Classifications

Accessing Ship To Classifications

1. On the Application Administration Web, click the **Customer** tab.
2. On the sidebar, click **Ship To Classification**. The Ship To Classification page displays.



Assigning Ship To Locations to Classes

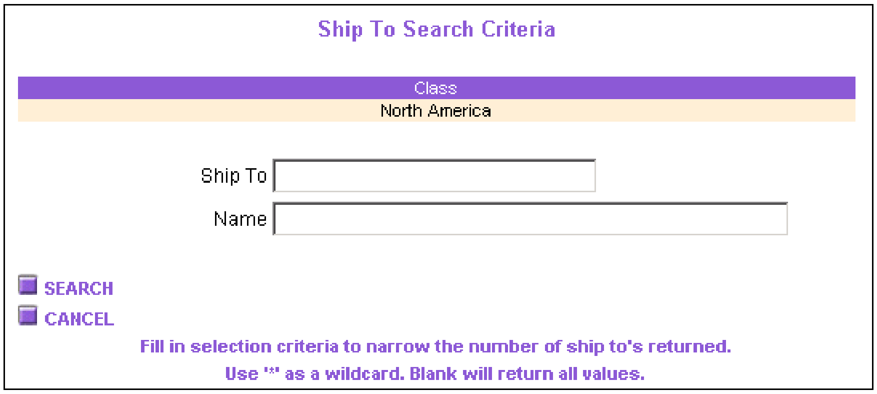
After you have defined your ship to location classification structure, you can begin assigning ship to locations to its classes.

1. In the Effective Date field in the Ship To Classification page, the current system date is displayed, and the classification structure for that date is displayed in the lower half of the page. If you want to view the structure for a different date, enter the new date, or click to select the date from the calendar.

2. The top level in the ship to location classification structure is displayed. If you want to assign ship to locations to a parent class, simply select the option button for that class.

   If you want to assign ship to locations to a child class, click **+** next to its parent class to display the next level in the parent's structure, or click **++** to expand its entire structure. Then, select the option button of the child class you want to assign ship to locations to.

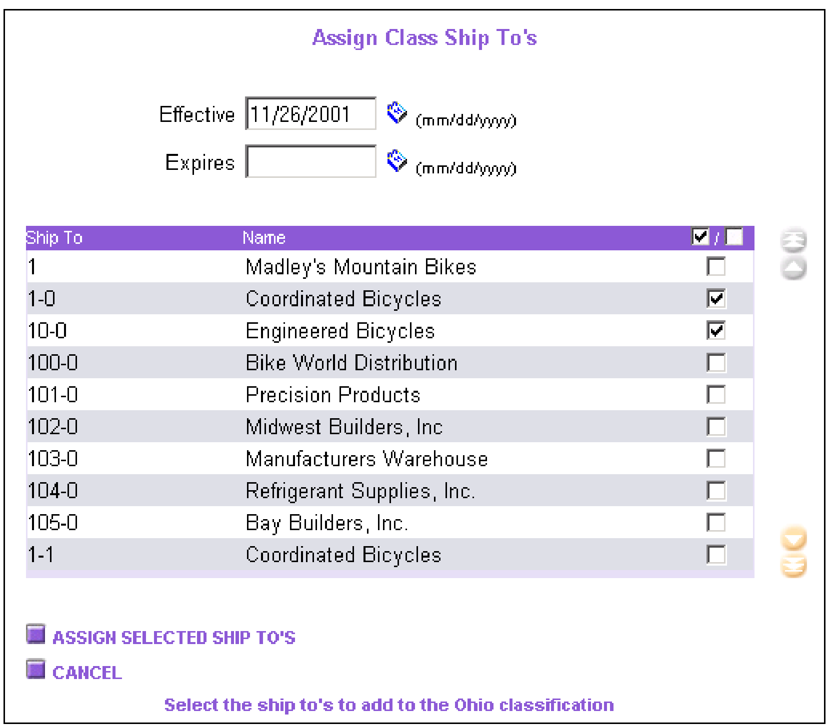
3. Click **ASSIGN SHIP TO'S TO CLASSIFICATION**. The Ship To Search Criteria page displays so that you can search for the ship to locations you want to assign to the class.



4. Fill in information in the following fields:

   - Ship To - Enter all or part of the ship to locations you want to assign, or leave this field blank to display all ship to locations that are on file.
   - Name - Enter all or part of the name of the ship to locations you want to assign, or leave this field blank to display all ship to location names, based on your entry in the Ship To field.

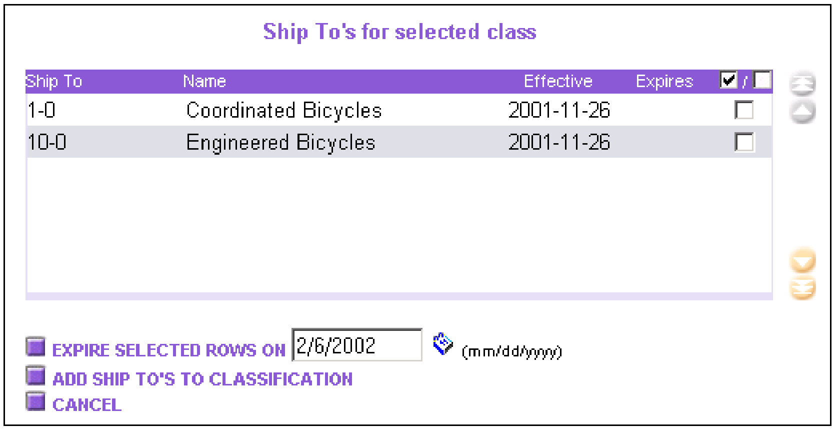
5. Click **SEARCH**. The Assign Class Ship To's page displays.



6. Fill in information in the following fields:

- Effective - The current system date is displayed, but you can enter a different effective date for the ship to locations you are assigning, or click to select the date from the calendar.
- Expire - If you want all the ship to location assignments to expire when a particular date is reached, enter that expiration date, or click to select the date from the calendar.

7. To assign account ship to locations to the class, select each one's check box in the right-most column.
8. Click **ASSIGN SELECTED SHIP TO'S** to assign the ship to locations to the class. The Ship To's for selected class page displays with the newly assigned locations displayed.



Viewing Ship To Locations Assigned to a Class

1. In the Effective Date field in the Ship To Classification page, enter the effective date of the classification structure to work with, or click to select the date from the calendar.
2. Click **VIEW CLASS FOR DATE** to update the lower half of the page with the structure that is in effect on the specified date.
3. The top level in the classification structure is displayed. You can do the following:
   - To view the ship to locations that are assigned to a parent class, simply select the option button for that class, and click **VIEW SHIP TO'S FOR SELECTED CLASS**.
   - To view the ship to locations that are assigned to all child classes under a parent class, select the parent's option button, and click **VIEW SHIP TO'S FOR ALL CHILD CLASSES**.
   - To view the ship to locations that are assigned to a child class, click **+** next to its parent class to display the parent's structure, or click **++** to expand the parent's entire structure. Then, select the option button of that child class, and click **VIEW SHIP TO'S FOR SELECTED CLASS**.
   - To view the ship to locations that are assigned to a child class and all its child classes, click **+** next to the parent class to display the parent's structure, or click **++** to expand the parent's entire structure. Then, select the option button of the applicable child class, and click **VIEW SHIP TO'S FOR ALL CHILD CLASSES**.

   The Ship To(s) in Classification page displays a list of all the assigned ship to locations.

Assigning an Expiration Date to Ship To Locations in a Class

When you are viewing the ship to locations that are assigned to a class, you can optionally assign an expiration date to them.

1. In the right-most column of the grid in the Ship To(s) for selected class page, select the check box of each ship to location you want to assign the same expiration date to.
2. In the field to the right of the **EXPIRE SELECTED ROWS ON** button, the current system date is displayed. If you want to assign a different expiration date to the selected ship to locations, enter the correct date, or click to select the date from the calendar.
3. Click **EXPIRE SELECTED ROWS ON** to assign the expiration date to the selected ship to locations.

Currencies

MAPICS is capable of processing orders in multiple currencies—including the EU and Euro currencies. Using the Application Administration Web, you can define the acceptable currencies, currency types and exchange rates.

NOTE The currencies you define in the Application Administration Web are used only by the Order Management (Commerce) functionality on the CRM Web site.

Currency Codes

For each currency that you support, you need to set up a corresponding currency code for it. Typically, you will use data synchronization to update MAPICS currencies from your enterprise system. You can, however, manually set up and maintain currencies in the Application Administration Web.

NOTE If a customer's currency does not match any that are set up in the MAPICS Currency database, your enterprise system must perform the currency conversion for price display.

CRM supports Euro and European Union (EU) currencies. This table shows the smallest currency unit or sub-unit for the current EU member states.

Country	National Currency	Smallest Unit	Name of Smallest Unit	Smallest Coin in Circulation
Austria	Schilling	0.01	1 Groschen *	10 Groschen *
Belgium	Franc	1.00	1 Franc	50 centimes *
Cyprus	Pound	1	1 cent	1 cent
Czech Republic	Crown	1	50 Haller	50 hallers
Denmark	Krone	1	25 øre	25 øre
Estonia	Kroon	1	5 centi	5 centi
Finland	Markka	0.01	1 penni	10 penni *
France	French Franc	0.01	1 centime *	5 centimes *
Germany	Deutsche Mark	0.01	1 Pfennig *	1 Pfennig *
Greece	Greek Drachmas	1	50 lepta	50 lepta
Hungary	Forint	1	1 forint	1 forint
Ireland	Irish Punt	0.01	1 penny *	1 penny *
Italy	Italian Lira	1.00	1 Lira	1 Lira
Latvia	Lats	1	1 santim	1 santim
Lithuania	Litas	1	1 centas	1 centas
Luxembourg	Franc	1.00	1 Franc	50 centimes *

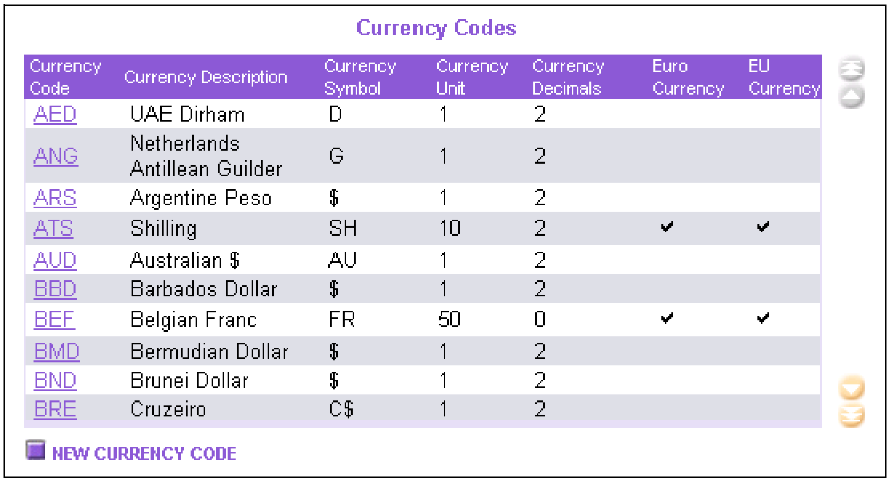
Malta	lira	1	1 cent	1 cent
The Netherlands	Guilder	0.01	1 cent *	5 cents *
Poland	Zloty	.01	1 grosz	1 grosz
Portugal	Escudo	0.10	10 centaro *	1 Escudo
Slovakia	Koruna	.	50 heller	50 hellers
Slovenia	Tolar	.1	10 stotin	10 Stotin
Spain	Peseta	1.00	1 Peseta	1 Peseta
Sweden	Krona	.50	50 öre	50 öre
United Kingdom	Pound	1	1 pence	1 pence
* Decimal sub-unit of the main unit – may represent the rounding factor				

This table provides the fixed conversion rates between the Euro and the participating member states. The rates are accurate to six significant figures.

Country	1 Euro Equals	National Currency (Abbreviation)
Austria	13.7603	Schilling (ATS)
Belgium	40.3399	Franc (BEF)
Denmark	7.46038	Danish Krone (DKK)
Finland	5.94573	Finnish Markka (FIM)
Estonia	15.6466	Kroon (EEK)
France	6.55957	Franc (FRF)
Germany	1.95583	Deutsche Mark (DEM)
Greece	340.750	Greek Drachma (GRD)
Hungary	276.1	Hungarian Forint (HUF)
Ireland	0.787564	Irish Punt (IEP)
Italy	1936.27	Italian Lira (ITL)
Lithuania	3.4528	Lita (LTL)
Luxembourg	40.3399	Franc (LUF)
Netherlands	2.20371	Guilder (NLG)
Portugal	200.482	Escudo (PTE)
Slovenia	239.64	Tolar (SIT)
Spain	166.386	Peseta (ESP)

Accessing Currency Codes

1. On the Application Administration Web, click the **Tools** tab.
2. On the sidebar, click **Currency>Codes**. The Currency Codes page displays.



Currency Codes

Currency Code	Currency Description	Currency Symbol	Currency Unit	Currency Decimals	Euro Currency	EU Currency
AED	UAE Dirham	D	1	2		
ANG	Netherlands Antillean Guilder	G	1	2		
ARS	Argentine Peso	$	1	2		
ATS	Shilling	SH	10	2	✔	✔
AUD	Australian $	AU	1	2		
BBD	Barbados Dollar	$	1	2		
BEF	Belgian Franc	FR	50	0	✔	✔
BMD	Bermudian Dollar	$	1	2		
BND	Brunei Dollar	$	1	2		
BRE	Cruzeiro	C$	1	2		

NEW CURRENCY CODE

Defining Currency Codes

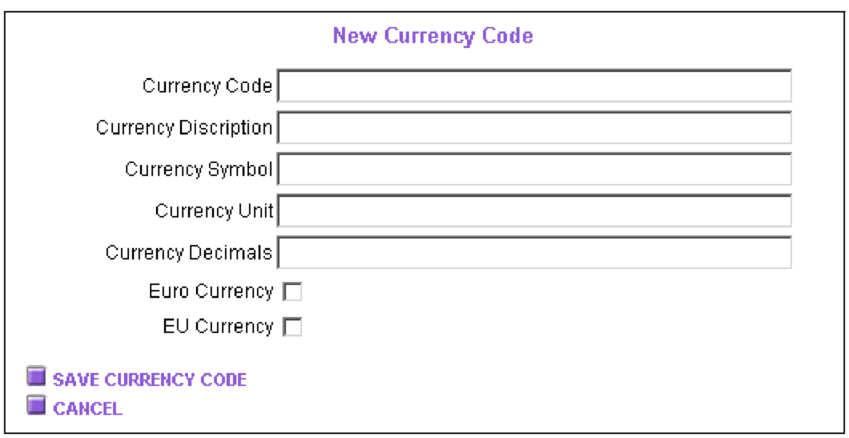
Before you can process orders in multiple currencies in CRM, you must define all the currencies you support. You can use data synchronization to update the system with all the currency codes from your enterprise system, or you can use the Application Administration Web to manually add them.

Each currency record consists of a currency code and its symbol, unit, and number of decimal places. It also indicates whether or not the currency is an EU or Euro currency.

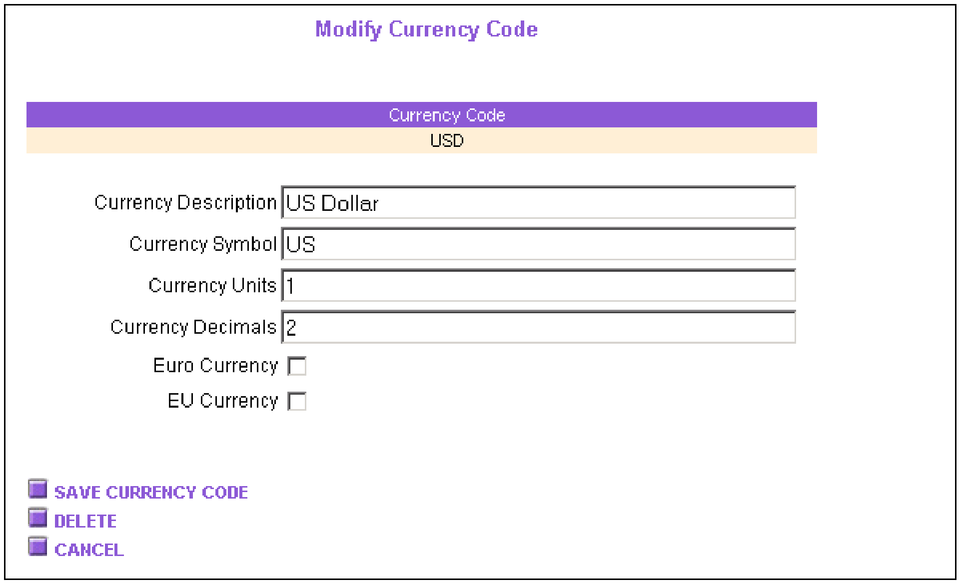
After you have defined your currency codes, you can then assign the default currency for CRM, using the System Administration Web (see Defining Logic Settings for an Environment for instructions).

Follow these steps to set up a new currency:

1. The grid in the Currency Codes page contains a list of all the currency codes that have already been defined. You can do the following:
   - To add a currency code, click **NEW CURRENCY CODE**. The New Currency Code page displays.



- To change information about an existing code, click its link in the Currency Code column. The Modify Currency Code page displays.



2. Fill in information in the following fields:
   - Currency Code - This field is accessible only if you are adding a currency code. Enter the standard three-character code (in uppercase letters) for the currency you are adding.

     Note: If you enter more than three characters, the system will truncate the code at three characters.
   - Currency Description - Enter a description of the currency, such as US Dollar or French Franc.
   - Currency Symbol - Enter the symbol for the currency (using up to two characters), such as $ or FR.
   - Currency Units - Enter the currency's unit quantity, such as 10 or 1. Refer to the first table under Currency Codes for the units of currency in the Euro countries.
   - Currency Decimals - Assign the number of decimal places to be used in standard expressions of the currency, such as 2.
   - Euro Currency - Select this check box if the code is for a Euro currency.
   - EU Currency - Select this check box if the code is for an EU (European Union) currency.
3. Click **SAVE CURRENCY CODE**.

Deleting a Currency Code

If you no longer accept a currency code, you can easily delete it. Follow these steps:

1. In Currency Codes page, click the link in the Currency Code column of the code you want to delete. The Modify Currency Code page displays.
2. Click **DELETE**.

Currency Exchange Types

Currency exchange types identify the different types of rates that may be applied to currency exchanges. For example, you might set up these rate types:

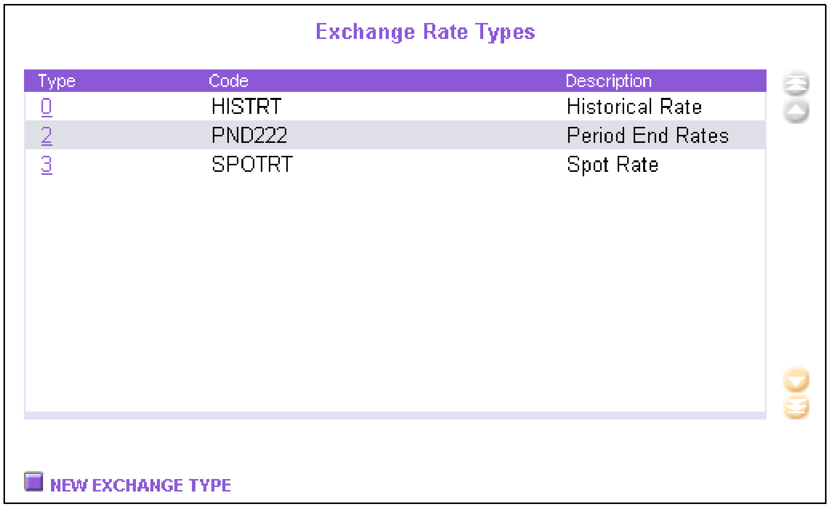
- **SPOT** for daily, frequently changing rates

- **HISTORICAL** for accounting purposes
- **AVERAGE** for additional accounting purposes

After you have defined your exchange types, you can use the System Administration Web to assign the one to be used by CRM (see Defining Logic Settings for an Environment for instructions).

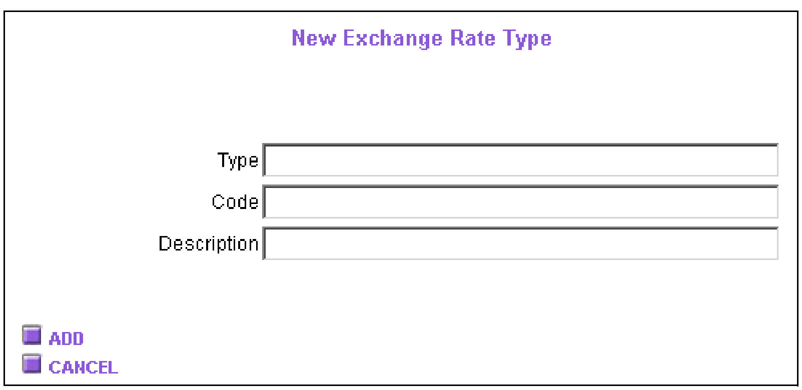
Accessing Currency Exchange Rate Types

1. On the Application Administration Web, click the **Tools** tab.
2. On the sidebar, click **Currency>Exchange Rate Types**. The Exchange Rate Types page displays.

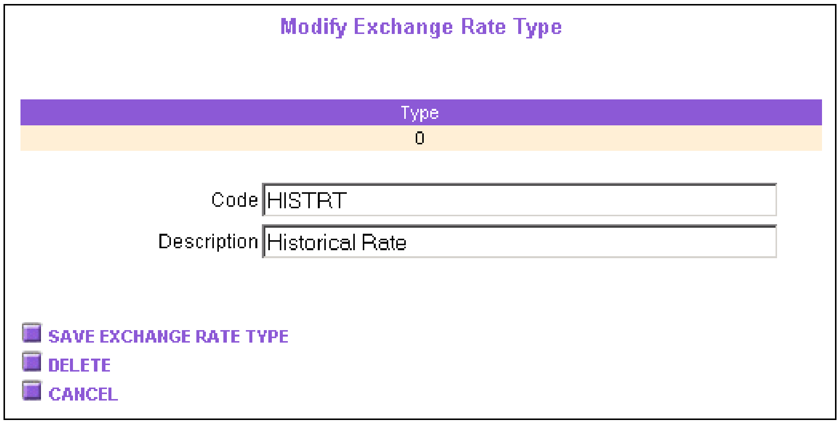


Defining Currency Exchange Types

1. The grid in the Exchange Rate Types page contains a list of all the exchange types that have already been defined. You can do the following:
   - To add an exchange type, click **NEW EXCHANGE TYPE**. The New Exchange Rate Type page displays.



- To change information about an existing exchange type, click its link in the Exchange Rate Type column. The Modify Exchange Rate Type page displays.



2. Fill in information in the following fields:
   - Type - This field is accessible only if you are adding an exchange type. Assign a unique number to it. Valid type values are 0-3 and 10000 or greater.
   - Code - Enter the standard code for the type of rate you are adding, using up to six characters.
   - Description - Enter a description of the rate type.
3. Click **SAVE EXCHANGE RATE TYPE**.

Deleting an Exchange Type

If you no longer use an exchange type, you can easily delete. Follow these steps:

1. In the Type column of the grid in the Exchange Rate Types page, click the link of the exchange rate type you want to delete. The Modify Exchange Rate Type page displays.
2. Click **DELETE**.

Currency Exchange Rates

After you have defined your currency codes and exchange types, you can set up the exchange rates between each pair of currencies.

NOTE: Optionally, you can update CRM with the currency exchange rates in your enterprise system. If you elect to do so, make sure that you do not add, change or delete exchange rates through the Application Administration Web, because your changes will not be reflected in your enterprise system.

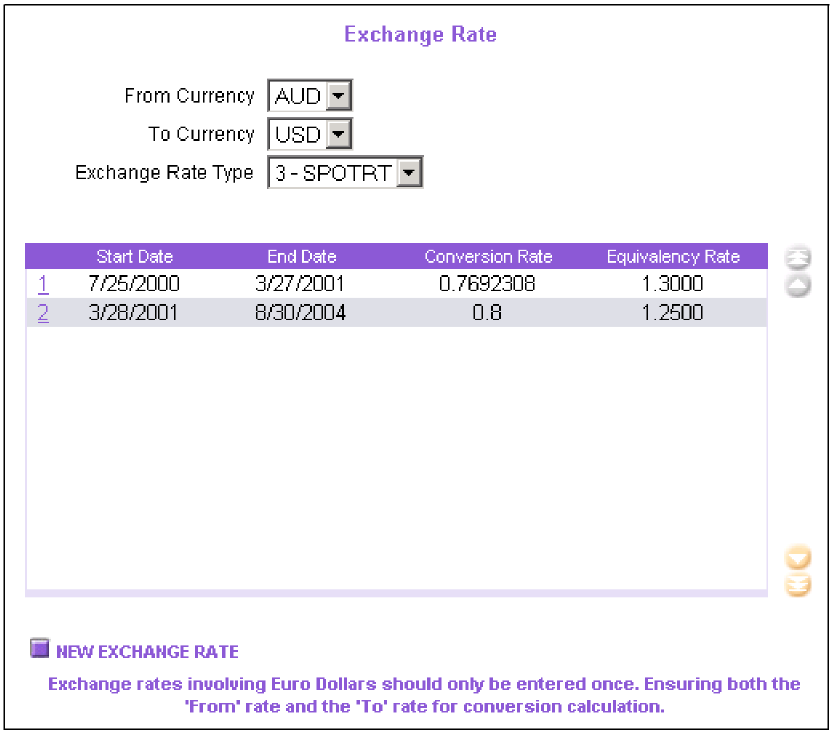
For each rate, you assign the conversion and equivalency rates, and the date range during which the rate is in effect.

NOTE: Once you have added an exchange rate record, you cannot delete it.

Accessing Currency Exchange Rates

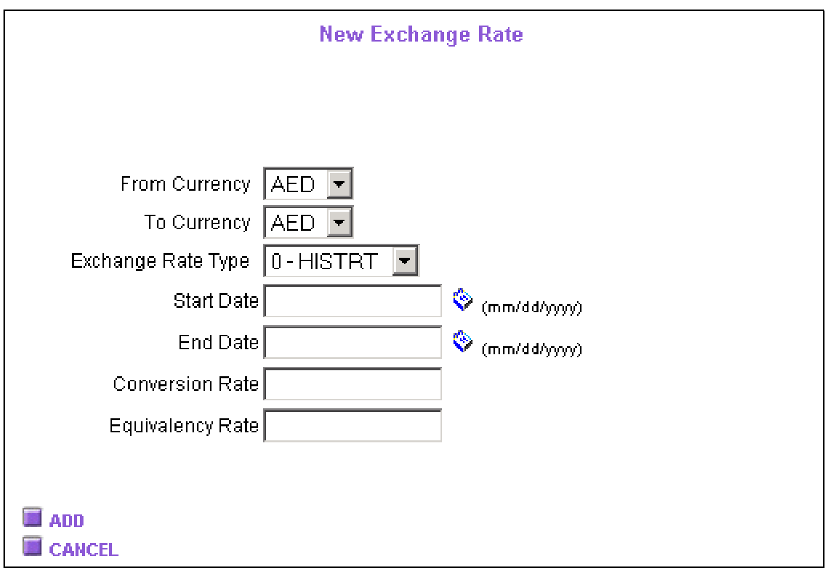
1. On the Application Administration Web, click the **Tools** tab.

2. On the sidebar, click **Currency>Exchange Rates**. The Exchange Rate page displays.

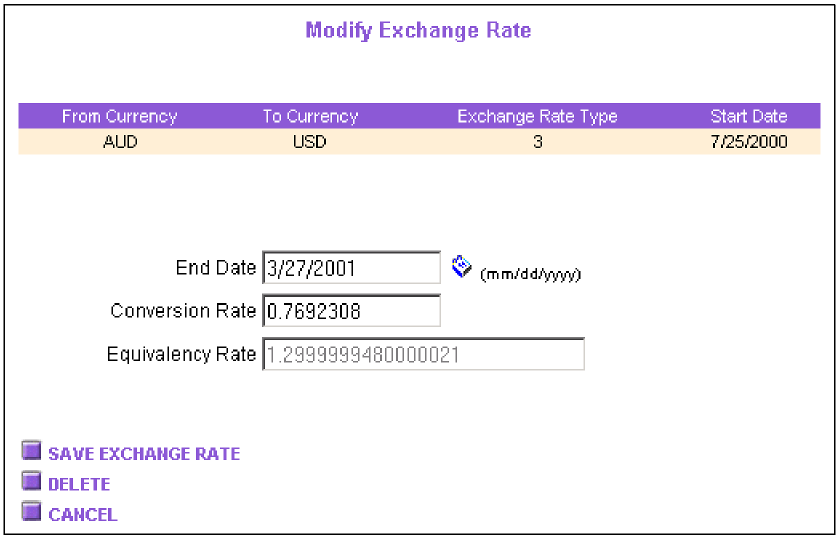


Defining Currency Exchange Rates

1. The grid in the Exchange Rate page contains a list of all the exchange rates that have already been defined. You can do the following:
   - To add an exchange rate, click **NEW EXCHANGE RATE**. The New Exchange Rate page displays.



- To change information about an existing exchange rate, click its link in the left-most column. The Modify Exchange Rate page displays.



2. Fill in information in the following fields:
   - From Currency - This field is accessible only if you are adding a rate. Select the currency you are converting.
   - To Currency - This field is accessible only if you are adding a rate. Select the currency you are converting to.
   - Exchange Rate Type - This field is accessible only if you are adding a rate. Select the exchange rate type you want to use for the conversion.
   - Start Date/End Date - The Start Date field is accessible only if you are adding a rate. Enter the effective date range of the rate, or click next to each field to select the dates from the calendar.
   - Conversion Rate - Enter the current conversion rate.

     The equivalency rate automatically displays in the Equivalency Rate field. This value is the reciprocal of the Conversion Rate value.
   - Equivalency Rate - The reciprocal of the value you entered in the Conversion Rate field is displayed for reference. This rate will be used to convert the "To Currency" to the "From Currency".
3. To save the exchange rate, click **ADD** if you are adding a rate, or click **SAVE EXCHANGE RATE** if you are modifying a rate.

Assigning Currency Information for CRM

Before you begin using CRM, you need to assign its base currency code and exchange rate type, using the System Administration Web. You also use this Web to identify the name of the logical database in which your currencies are stored.

You use the following Environment settings to define this information:

Category	Setting	Description
Database	Frontstep Currency LDB	Identifies the name of the logical database that stores currency information
Logic	Currency code	Identifies the base currency for CRM
Logic	Currency rate type	Identifies the exchange rate type to be used to convert between order currencies and the base currency

NOTE

You define the domestic currency for CRM Sales and Marketing in the ICOMP_tblSettings table.

In the CRM Currency table INTL_tblCurrency, you define (through the Application Administration Web) the valid currency codes and their relationship to the base domestic currency. This information is not synchronized with ERP.

When you create an opportunity through the Sales sidebar or a project through the Service sidebar, you can specify the currency of the amounts entered for the opportunity or project. Your selection options are based on the entries in the Currency table.

When you run the Financial Forecast or Revenue Forecast Report, all opportunities will be converted to values in your domestic currency, using the Currency table.

See Environments for more information about the Environment settings for currencies, and for instructions on assigning their values.

Active Link

Event messages are used to process CRM data; for example, they keep data synchronized between your enterprise system and CRM. The Event Message Service processes the event messages.

All entries that have been logged by the Service are tracked in the Message Audit Log. You can review the audit logs and optionally resubmit messages for processing, using the Application Administration Web.

If a message is set up for Referral processing (that is, its Create Referral check box is selected in Active Link Designer), a referral record is also automatically generated for it if a processing error is encountered. The referral record identifies the source of the problem. Using the Application Administration Web, you can review the referral record and optionally resubmit the event message for processing after the problem has been resolved.

NOTE Typically, Referral processing is used only for XML-based messages.

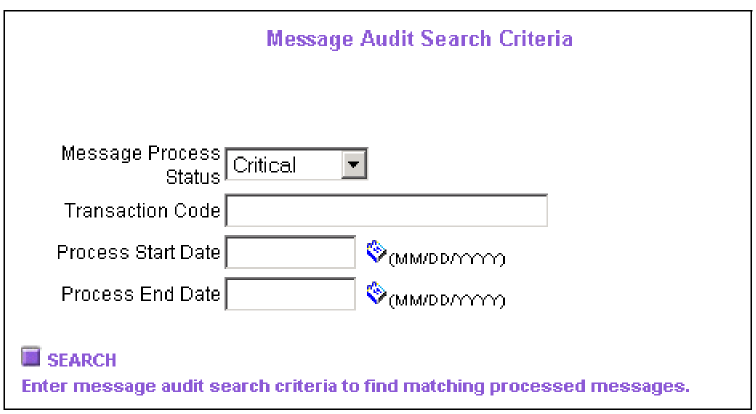
The Application Administration Web also includes features for testing event messages and reviewing messages that are currently queued for processing.

Message Audit Review

Audit records enable you to view the processing details for a given event message. In addition to identifying which message was processed and its processing date and status, an audit record also shows the layout of the event message and provides a description of its status.

Accessing Message Audit Review

1. On the Application Administration Web, click the **Tools** tab.
2. On the sidebar, click **Active Link>Message Review**. The Message Audit Search Criteria page displays.

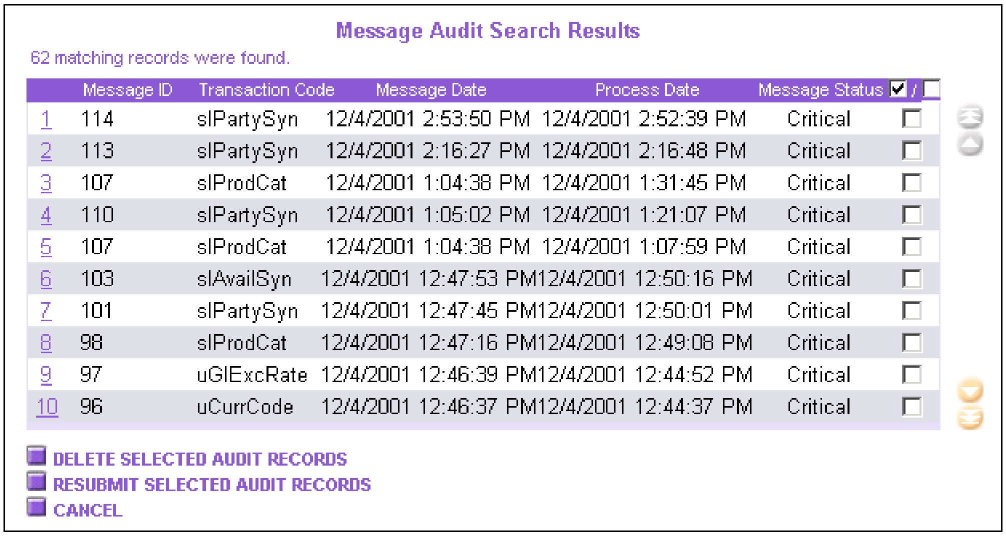


Searching for Message Audit Records

1. In the Message Audit Search Criteria page, fill in search criteria in the following fields:
   - Message Process Status - This field is set to **Critical**, indicating that only message audit records with a *Critical* status will be retrieved. If you want to work with message audit records of a different status, select one of these options from the list: **Warning**, **Information**, or **All**.
   - Transaction Code - If you want to retrieve a particular event message's audit records, enter that message's transaction code.

- Process Start Date/Process End Date - Enter the date range of the records you want to retrieve, or click to select the starting and ending dates from the calendar. Note that you can leave the Process Start Date field blank to begin with the oldest date on file, and you can leave the Process End Date field blank to end with the most recent date on file; leaving both fields blank will retrieve audit records for all dates.

2. Click **SEARCH**. All matching records display in the Message Audit Search Results page.

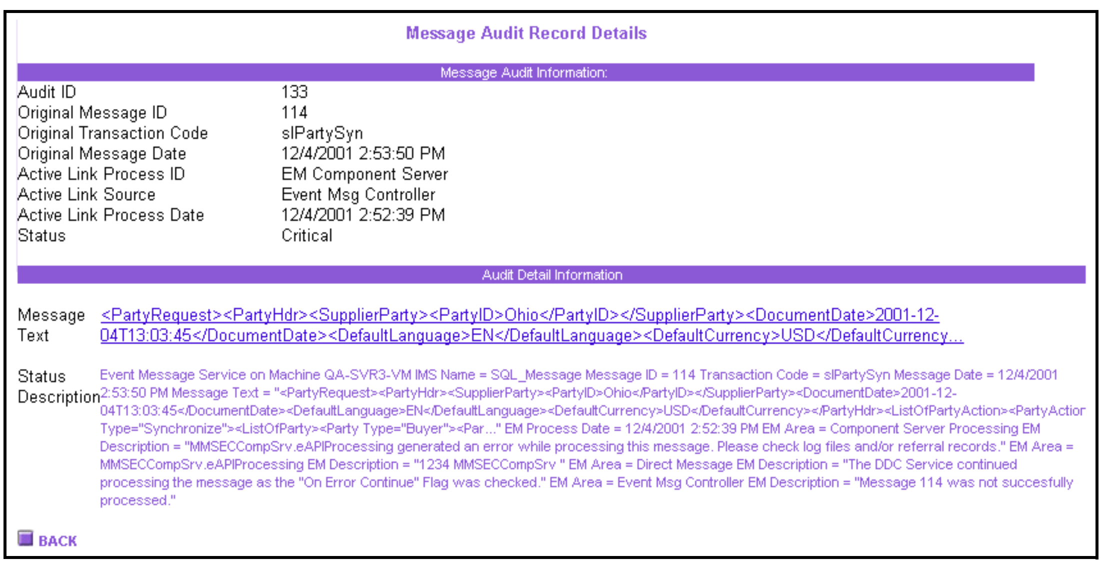


Viewing Message Audit Record Details

1. If you have not already done so, search for the message audit records you want to view.

2. In the Message Audit Search Results page, all audit records that matched your search criteria are displayed. Locate the one you want to review.

3. In the left-most column of the grid, click the link of the message audit record. The Message Audit Record Details page displays.



4. If the Message Text information is underlined, you can click it to view the associated XML document (and its data). The document displays in a separate browser session.

5. When you are finished reviewing the audit record details, click **BACK** to return to the Message Audit Search Results page.

Resubmitting a Message

After you have identified and fixed the problem with an event message, you can resubmit the message for processing. Follow these steps:

1. If you have not already done so, search for the message audit record you want to resubmit.
2. In the Message Audit Search Results page, all audit records that matched your search criteria are displayed. Locate the one you want to resubmit.
3. In the right-most column, select the check box on that message's line.
4. Click **RESUBMIT SELECTED AUDIT RECORDS**.
5. The following message displays:

   Message Successfully Resubmitted to the Event Message Service.

   Click **Continue**.
6. On the sidebar, click **Message Queue**. Then in the Message Queue page, make a note of the Message ID of the message you resubmitted. You need to know this ID to ensure that the message was reprocessed without errors.
7. On the sidebar, click **Message Review**. The Message Audit Search Criteria page displays.
8. Search for the message audit record.
9. In the Message Audit Search Results page, locate the audit record for the message—it should be at the bottom of the grid. Click the link in the left-most column to review the audit record to make sure that it was successfully processed.

Deleting Message Audit Records

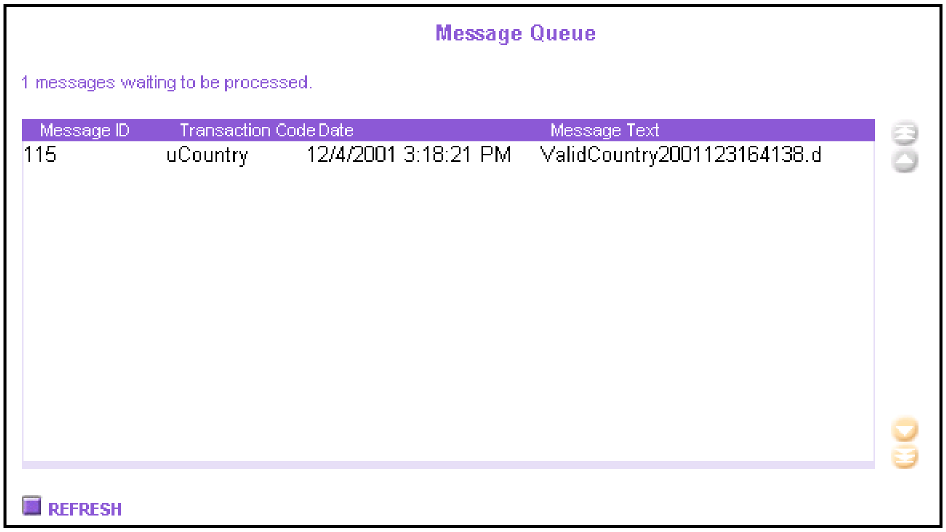
After you have verified that message audit records have been successfully processed, follow these steps to delete them:

1. If you have not already done so, search for the message audit records you want to delete.
2. In the Message Audit Search Results page, all audit records that matched your search criteria are displayed. Locate the message you want to delete.
3. In the right-most column of the grid, select the check box of each message you want to delete.
4. Click **DELETE SELECTED AUDIT RECORDS**.

Viewing the Event Message Queue

When an event message is sent, an entry is created for it in the Enterprise Message table until it is processed. You can view which messages, if any, are waiting to be processed in the queue. Follow these steps:

1. On the Application Administration Web, click the **Tools** tab.
2. On the sidebar, click **Active Link>Message Queue**. The Message Queue page displays.



3. The grid lists any messages that are waiting to be processed. To refresh the grid, click **REFRESH**; any messages that have been processed since you accessed this page are removed.

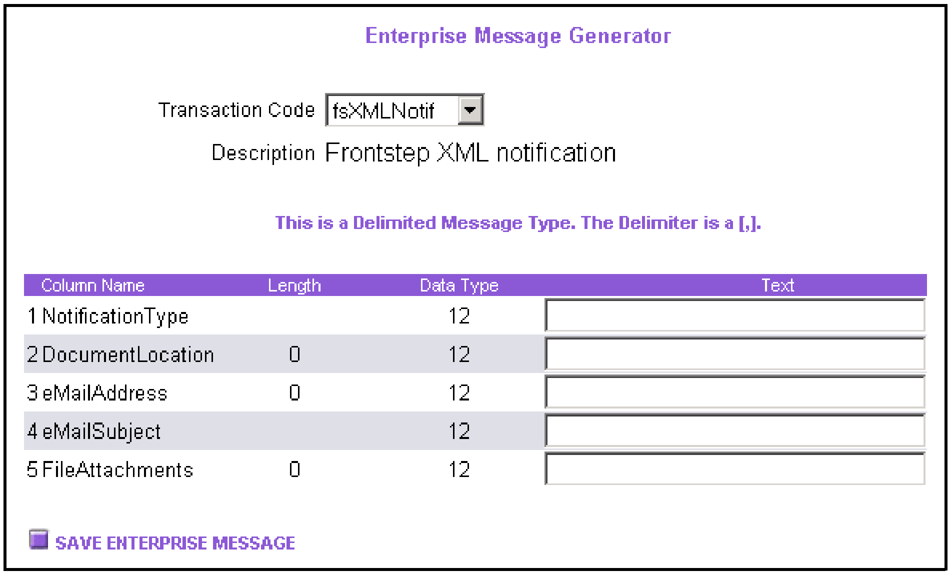
Testing an Event Message

Before using event messages to process data, you can test their defined process flows to ensure that their sequences are set up in the correct order with the correct information.

When you select a transaction code in the Enterprise Message Generator page, all its column names display, along with their settings. You identify the value to be passed for each segment (column) in the message in the associated Text field.

1. On the Application Administration Web, click the **Tools** tab.

2. On the sidebar, click **Active Link>Message Creation**. The Enterprise Message Generator page displays.



3. In the Transaction Code field, select the event message you want to test. The description of the message displays for reference. In addition, the lower half of the page is updated with the columns (segments) in the selected transaction code.
4. In the Text field for each displayed column, enter the test data.
5. Click **SAVE ENTERPRISE MESSAGE** to save the test message.

You can then view the event message queue (see the previous procedure) to ensure that the message is processed. If errors are encountered, you can review the message audit record (see Viewing Message Audit Record Details). Make a note of the message ID, because it is the key for looking up the audit record.

Referrals

For any message that is set up for Referral processing (that is, the Create Referral check box is selected for the message in Front Office Designer), a referral record is also automatically generated for it if a processing error is encountered. The referral record identifies the source of the problem.

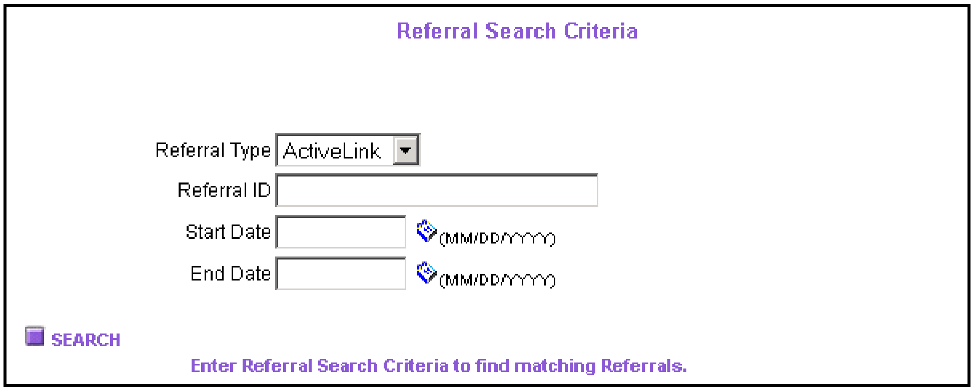
Using the Application Administration Web, you can review referral records and optionally resubmit their associated event messages for processing after you have resolved the problems.

NOTE: Typically, Referral processing is used only for XML-based messages.

Accessing Referrals

1. On the Application Administration Web, click the **Tools** tab.

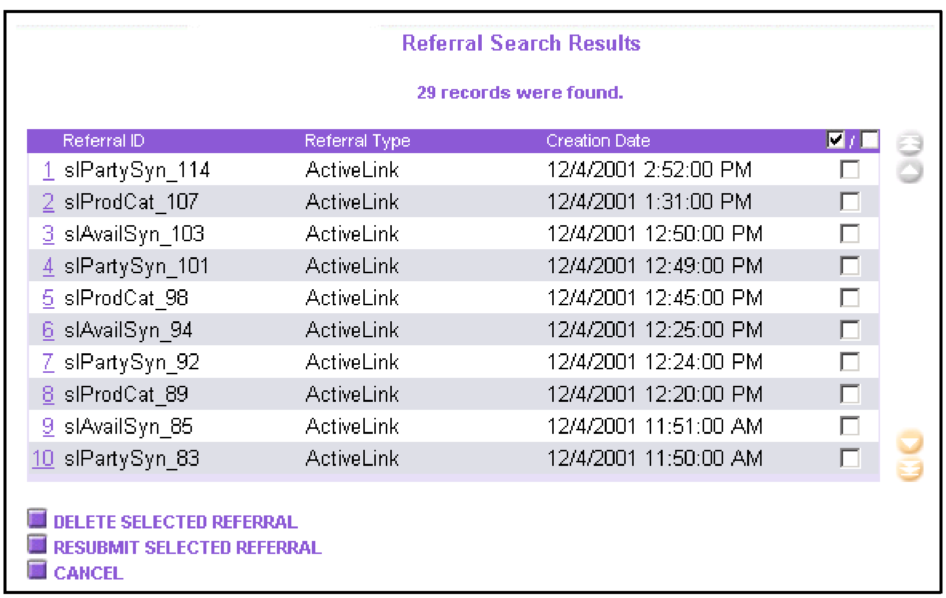
2. On the sidebar, click **Active Link>Referral**. The Referral Search Criteria page displays.



Searching for Referral Records

Before you can begin viewing referral records, you need to search for the particular ones to work with.

1. In the Referral Search Criteria page, fill in search criteria in the following fields:
   - Referral Type - This field is set to **Active Link**. If you want to search for a different type of referral record, select it from the list.
   - Referral ID - Enter all or part of the message ID of the referral you want to retrieve, or leave this field blank to search for all referral IDs of the selected type.
   - Start Date/End Date - Enter the date range of the referrals you want to retrieve, or click to select the starting and ending dates from the calendar. Note that you can leave the Start Date field blank to begin with the oldest date on file, and you can leave the End Date field blank to end with the most recent date on file; leaving both fields blank will retrieve audit records for all dates.
2. Click **SEARCH**. The Referral Search Results page displays, containing a list of all referrals that matched your search criteria.



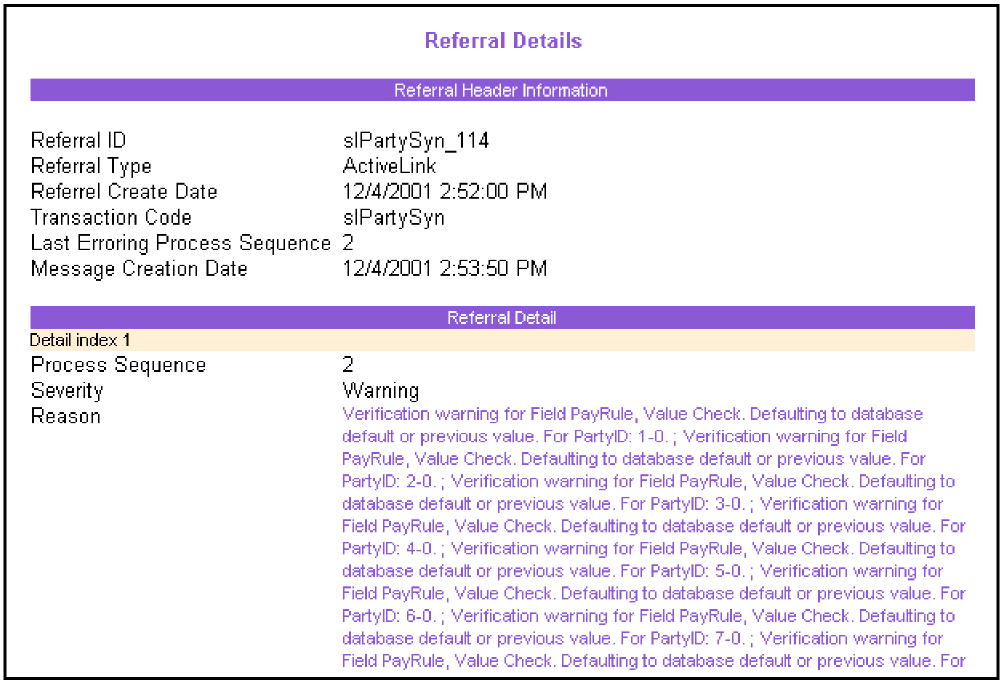
Viewing a Referral's Detail

For each referral record, the following detail information is tracked:

- Its ID, type and creation date
- The transaction code (event message) that was processed
- The process sequence that generated the error
- The date the event message was created
- Text that describes the error

To view a referral record:

1. In the left-most column of the grid in the Referral Search Results page, click the link of the referral you want to view. The Referral Details page displays, showing the process sequence that generated the error(s).



Referral Details

Referral Header Information

Referral ID	slPartySyn_114
Referral Type	ActiveLink
Referrel Create Date	12/4/2001 2:52:00 PM
Transaction Code	slPartySyn
Last Erroring Process Sequence	2
Message Creation Date	12/4/2001 2:53:50 PM

Referral Detail

Detail index 1

Process Sequence	2
Severity	Warning
Reason	Verification warning for Field PayRule, Value Check. Defaulting to database default or previous value. For PartyID: 1-0. ; Verification warning for Field PayRule, Value Check. Defaulting to database default or previous value. For PartyID: 2-0. ; Verification warning for Field PayRule, Value Check. Defaulting to database default or previous value. For PartyID: 3-0. ; Verification warning for Field PayRule, Value Check. Defaulting to database default or previous value. For PartyID: 4-0. ; Verification warning for Field PayRule, Value Check. Defaulting to database default or previous value. For PartyID: 5-0. ; Verification warning for Field PayRule, Value Check. Defaulting to database default or previous value. For PartyID: 6-0. ; Verification warning for Field PayRule, Value Check. Defaulting to database default or previous value. For PartyID: 7-0. ; Verification warning for Field PayRule, Value Check. Defaulting to database default or previous value. For

2. When you are finished viewing the details, click **BACK** at the bottom of the page.

Resubmitting a Referral's Event Message

After resolving the error that generated a referral, you can resubmit the associated event message for processing. Follow these steps:

1. In the right-most column of the grid in the Referral Search Results page, select the check box of each referral whose event message you want to resubmit for processing.
2. Click **RESUBMIT SELECTED REFERRAL**.
3. The following message displays:

    Referrals Successfully Resubmitted.

    Click **Continue**.
4. In the sidebar menu, click **Message Queue**. Then in the Message Queue page, make a note of the Message ID of the referral that was resubmitted. You need to know this ID to ensure that the referral was reprocessed without errors.
5. On the sidebar, click **Referral**. The Referral Search Criteria page displays.
6. Search for the referral by setting the referral ID to the message ID you noted in step 4.

7. If no referral record displays in the Referral Search Results page, the message was successfully processed.
8. On the sidebar, click **Message Review**. The Message Audit Search Criteria page displays.
9. Search for the message audit record.
10. In the Message Audit Search Results page, locate the audit record for the message—it should be at the bottom of the grid. Then, click the link in the left-most column to review the audit record.

Deleting a Referral

After a referral has been resubmitted and successfully processed, you can delete it. Follow these steps:

1. In the grid in the Referral Search Results page, select the check box in the right-most column of each referral you want to delete.
2. Click **DELETE REFERRAL**.

Country Locations

A list of all country codes is provided with the system. If a country code field in CRM is editable, you will be able to select a country from the list.

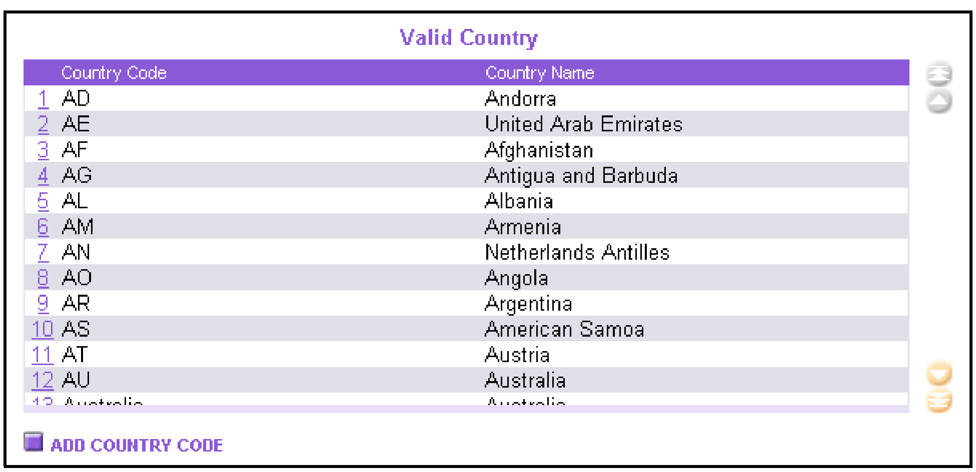
Each country may be divided into different locations, such as states or provinces. A list of all the locations within the United States and Canada is provided with the system. If a state/ province field in CRM is editable, you will be able to select a location from the list.

Country Codes

In the Application Administration Web, the list of country codes is predefined for you. You can, however, define additional codes, change the name of the country that is associated with a given code, and delete codes you no longer need or support in CRM.

Accessing Country Codes

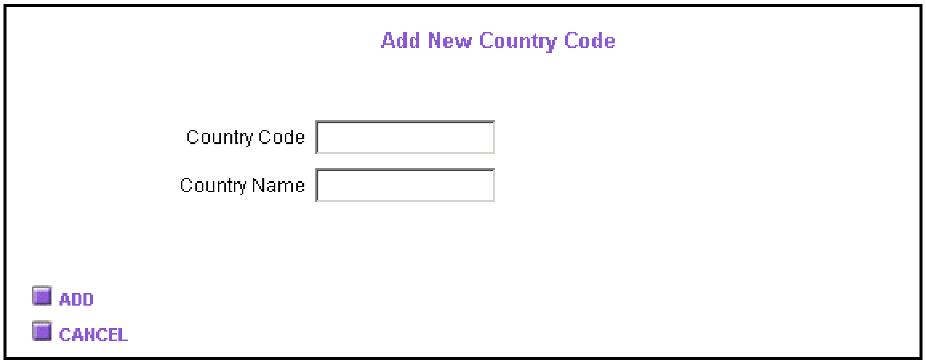
1. On the Application Administration Web, click the **Tools** tab.
2. On the sidebar, click **Country Location>Country Code**. The Valid Country page displays.



Adding a Country Code

Although all country codes are initially included with the Application Administration Web, you may have to periodically add a new one. Follow these steps:

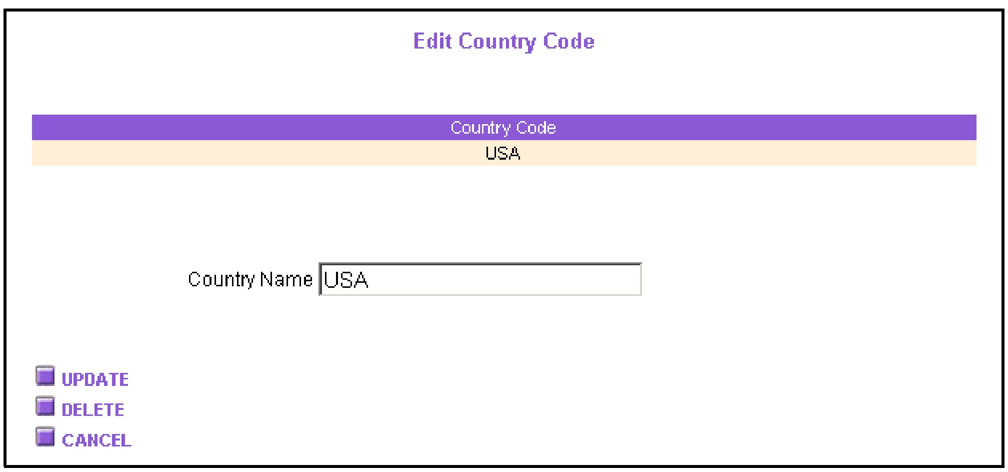
1. In the Valid Country page, click **ADD COUNTRY CODE**. The Add New Country Code page displays.



2. Fill in information in the following fields:
   - Country Code - Enter a unique code for the country you are adding.
   - Country Name - Enter the name of the country as you want it to display in selection lists.
3. Click **ADD** to save the country code.

Changing the Name of a Country

1. In the left-most column of the grid in the Valid Country page, click the link of the country code you want to work with. The Edit Country Code page displays.



2. In the Country Name field, enter the correct name of the country. This name will display in selection lists in CRM.
3. Click **UPDATE**.

Deleting a Country Code

If you no longer use a country code, you can delete it. Follow these steps:

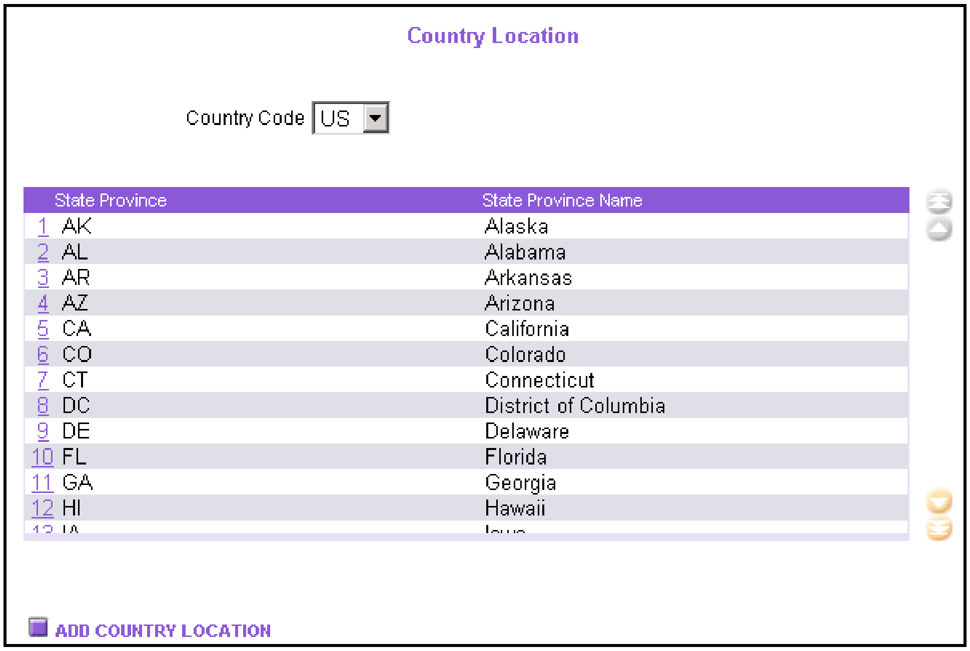
1. In the left-most column of the grid in the Valid Country page, click the link of the country code you want to delete. The Edit Country Code page displays.
2. Click **DELETE**.

Locations

In the Application Administration Web, the states and provinces within the United States and Canada, and the U.S. and Canadian country codes (US and CA, respectively) are predefined for you. You can, however, add your own locations, change the name of an existing location, and delete locations you no longer need in CRM.

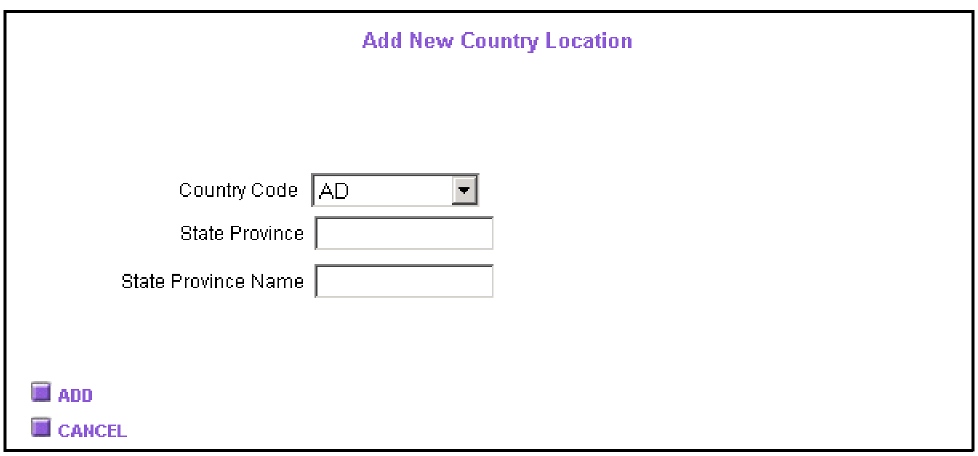
Accessing Locations

1. In the Application Administration Web, click the **Tools** tab.
2. On the sidebar, click **Country Location>Location**. The Country Location page displays.



Adding a Location

1. In the Country Location page, click **ADD COUNTRY LOCATION**. The Add New Country Location page displays.



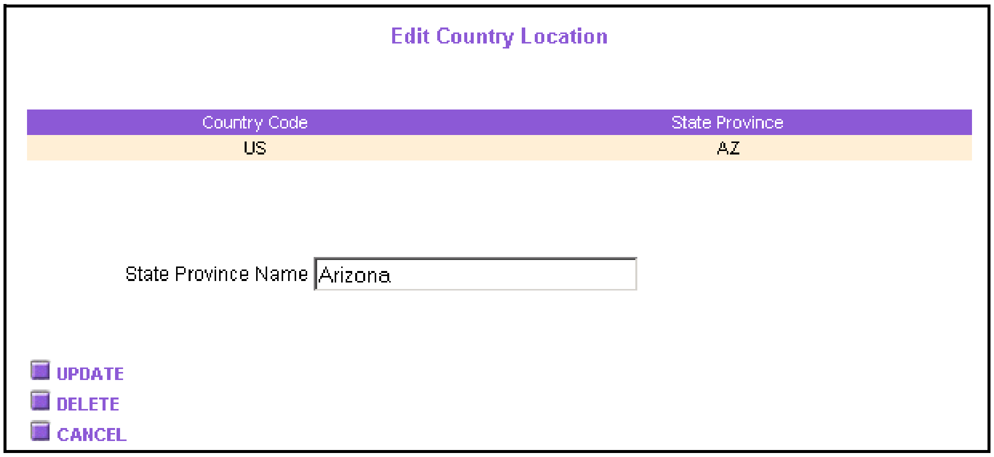
2. Fill in information in the following fields:
   - Country Code. Select the code of the country in which the state or province is located.
   - State Province - Enter the abbreviation of the state or province you are adding. The abbreviation must be unique for this country code.

- State Province Name - Enter the name of the state or province you are adding. This name will be displayed in selection lists.

3. Click **ADD** to save the location.

Changing the Name of a Location

1. In the Country Code field in the Valid Country page, select the country where the state or province is located. The grid is updated with all locations within that country.
2. In the left-most column of the grid, click the link of the location you want to work with. The Edit Country Location page displays.



3. In the State Province Name field, enter the correct name of the location. This name will display in selection lists.
4. Click **UPDATE**.

Deleting a Location

If you no longer support a location within a country, you can delete that location. Follow these steps:

1. In the Country Code field in the Valid Country page, select the country where the state or province is located. The grid is updated with all locations within that country.
2. In the left-most column of the grid, click the link of the location you want to delete. The Edit Country Location page displays.
3. Click **DELETE**.

Batch Request Management

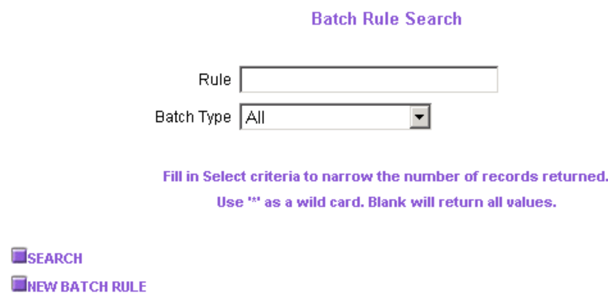
This topic applies to MAPICS iSeries only.

To maintain batch processing, use rules to synchronize data in a batch mode.

The Batch utility handles all content requests dealing with the batch request functionality for ERP integration. Content requests are processed in batches using filtering rules. These rules are used in XML process broker requests between CRM and the ERP system.

To access the Batch utility, do the following:

1. In the Application Administration Web, click the **Tools** tab.
2. On the sidebar, select Batch, the Batch Rule Search page displays.



Batch Types

These batch types are available to create rules:

- Sync Countries
- Sync Currencies
- Sync Currency Rates
- Sync Customers
- Sync Item
- Sync Orders
- Sync Quotes
- Sync RMA
- Sync Ship Codes
- Sync Sites.

Searching for a Batch Management Rule

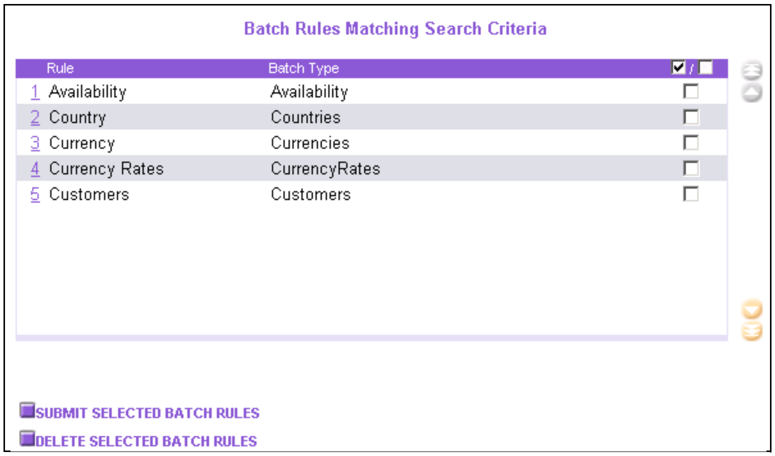
This topic applies to MAPICS iSeries only.

To search for rules, do the following:

1. In the Batch Rule Search page, enter the following criteria:
   - Rule - Enter the name of the rule you want to find.

- Batch Type - Select the category you want to search. Selecting All will search for all batch types.

2. Click **SEARCH**. The lower part of the page displays the Batch Rules Matching Search Criteria.



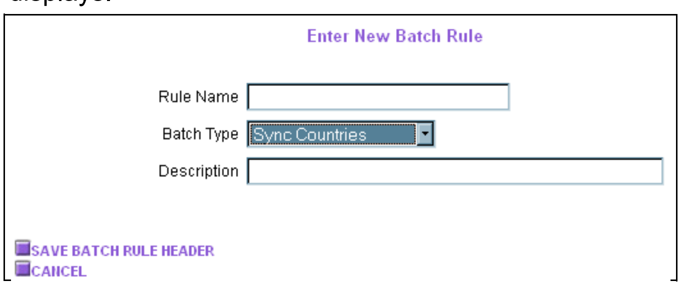
3. Select the rule you want to view by clicking the number next to the rule.

Creating a New Batch Management Rule

This topic applies to MAPICS iSeries only.

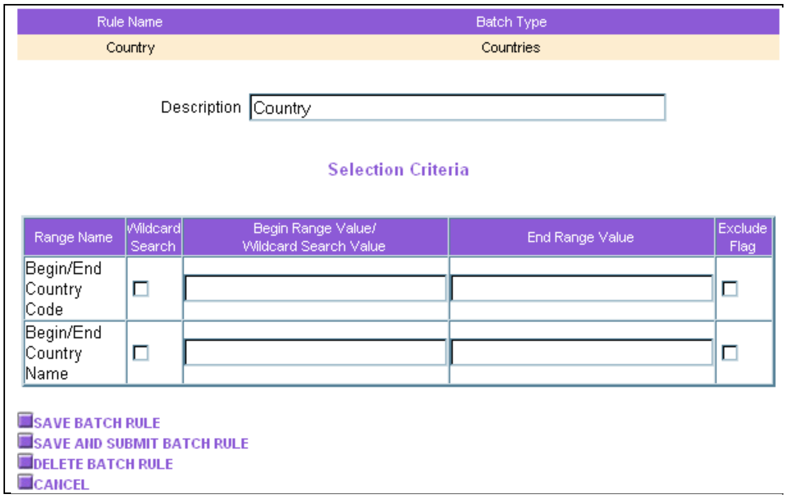
To create a new rule and assign it to a batch type, do the following:

1. On the Batch Management page, click **NEW RULE**. The Enter New Batch Rule page displays.



2. Fill in information in the following fields:
   - Name - enter a name for the rule.
   - Batch Type - Select the batch type to assign to the rule.
   - Description - Enter a description of the rule.

3. Click **SAVE BATCH RULE HEADER**. The selection criteria displays a grid of selection criteria for the rule. The following example shows the criteria for Countries. Each batch type will display a different set of selection criteria.



4. In the Selection Criteria grid for each Range Name line, do the following:
   - Wildcard Search - Select this check box if you wish to use a wildcard in the rule. Selecting this check box disables the End Range Value field.
   - Begin Range Value/Wildcard Search Value - Enter the starting range value or the wildcard search value.
   - End Range Value - Enter the ending range value.
   - Exclude Flag - Select this check box to exclude any matches.
5. To save the rule, click **SAVE BATCH RULE**. To save the rule, build the appropriate request document and submit it to the ERP system, click **SAVE AND SUBMIT**.

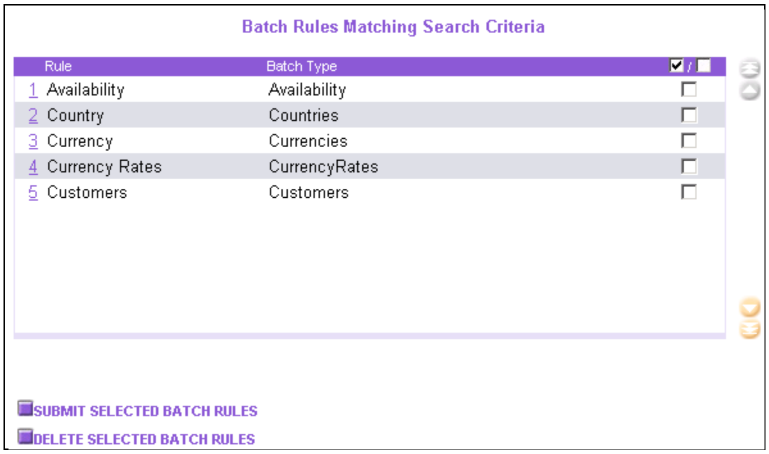
You can submit rules one at a time or submit them in a group on the Batch Rules Matching Search Criteria page by selecting the rule's check box.

Deleting a Batch Management Rule

NOTE — This topic applies to MAPICS iSeries only.

If your environment no longer supports a particular rule, you can delete it. Follow these steps:

1. Search for the rule you want to delete.



2. Select the rule by selecting the check box.
3. Click **DELETE SELECTED BATCH RULES**.

You can also delete a rule on the Selected Batch Rule page.

8

Pricing and Supply Chain

Pricing

Information regarding the MAPICS Advanced Pricer is available in the MAPICS *Advanced Pricer Integration Guide.*

Supply Chain

Information regarding MAPICS Supply Chain Center is available in the *Supply Chain Administration Guide* and *Supply Chain Reference Guide.*

9

Orders

This chapter applies to both CRM and Customer Center.

Through the Application Administration Web, you can define various rules that affect order processing in CRM, including:

- Shipment Rules - The modes of delivering orders
- Payment Rules - The valid methods of payment for orders
- Confirmation Rules - The methods for delivering order confirmations to customers

NOTE: CRM comes with predefined confirmation rules. You will need to define your own rules only if you use additional confirmation methods.

You can also set up the sites in your company that are responsible for supplying the products your customers order.

In addition, you can create system order pads, which customers can then use to place orders in CRM.

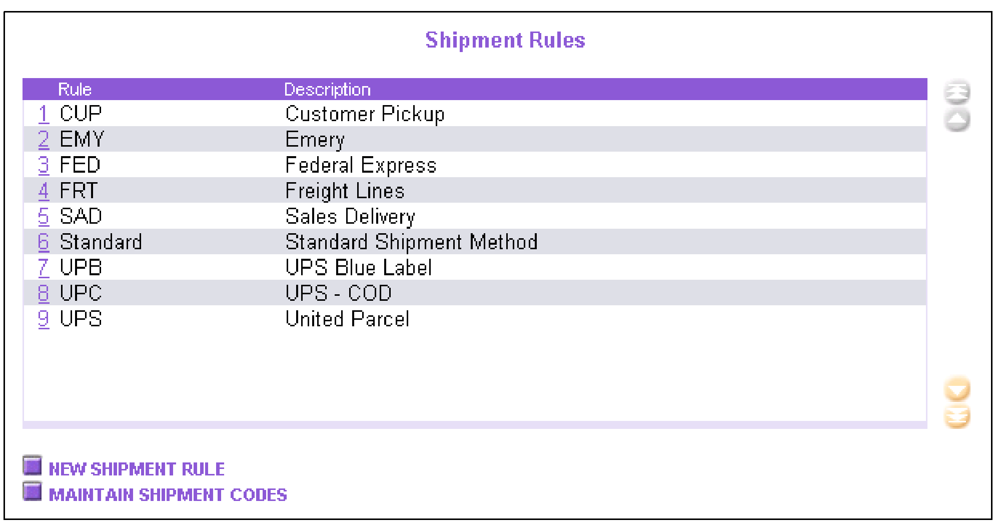
Shipment Rules

A shipment rule identifies the delivery methods that can be used to ship orders placed in CRM or Customer Center, such as Federal Express, UPS, and so on. The rule that is assigned to a customer determines which delivery methods are available for that customer.

Before creating a shipment rule, first define all the shipment codes (delivery methods) that apply to that rule.

Accessing Shipment Rules

1. On the Application Administration Web, click the **Order** tab.
2. On the sidebar, click **Rules>Shipment Rules**. The Shipment Rules page displays.

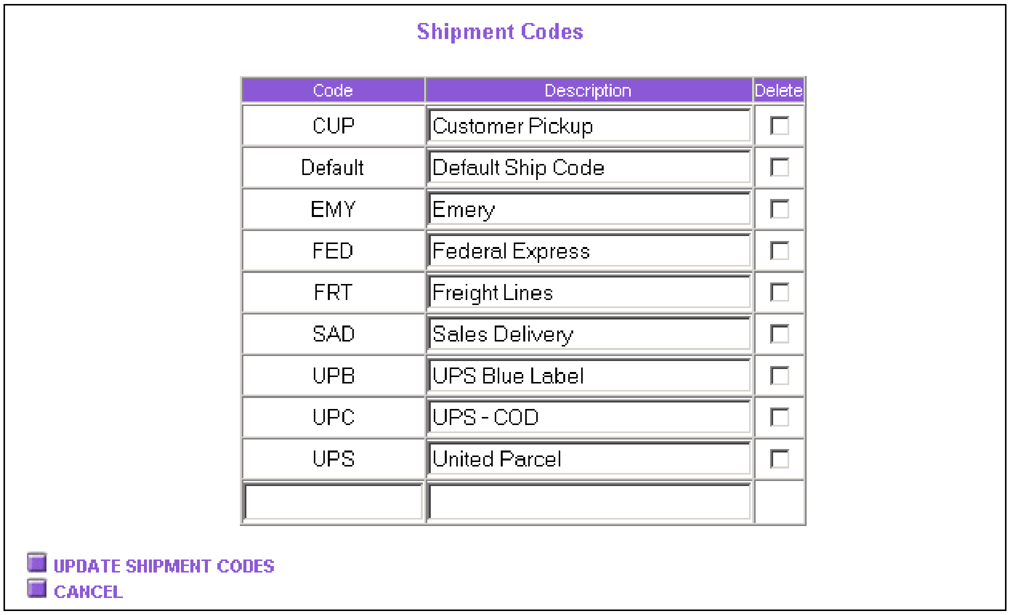


Defining Shipment Codes

A shipment code defines a method of delivery that may be used to ship orders placed in CRM.

After setting up the codes, you need to assign them to the shipment rules to which they belong. An account's assigned rule determines what methods can be used to ship that customer's orders.

1. In the Shipment Rules page, click **MAINTAIN SHIPMENT CODES**. The Shipment Codes page displays.


Shipment Codes

Code	Description	Delete
CUP	Customer Pickup	☐
Default	Default Ship Code	☐
EMY	Emery	☐
FED	Federal Express	☐
FRT	Freight Lines	☐
SAD	Sales Delivery	☐
UPB	UPS Blue Label	☐
UPC	UPS - COD	☐
UPS	United Parcel	☐

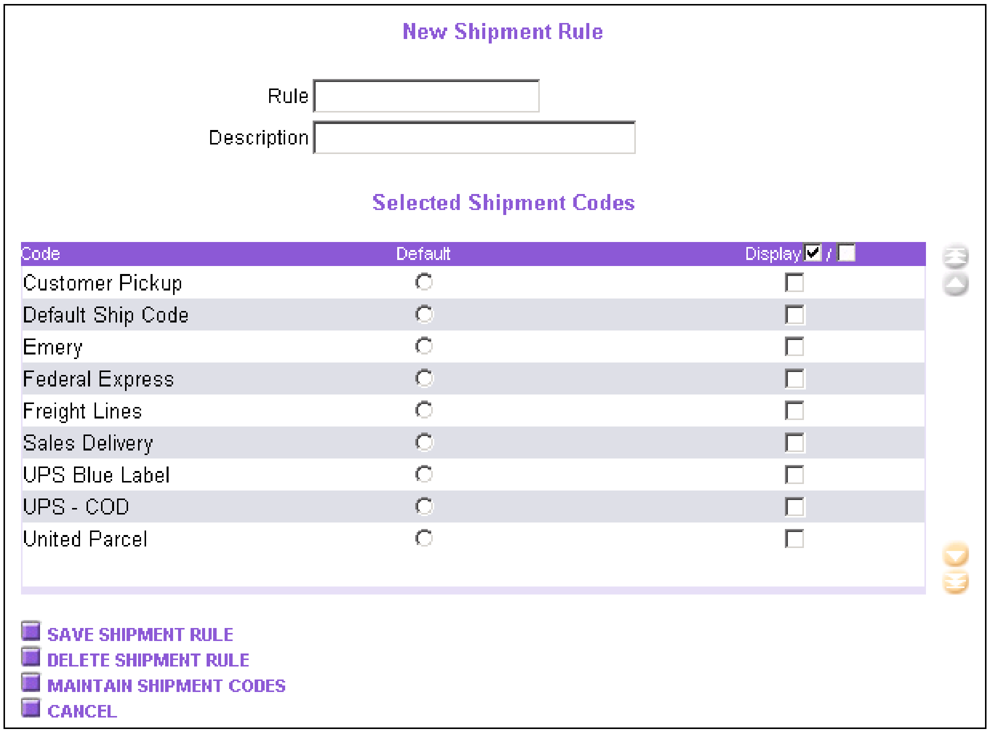
UPDATE SHIPMENT CODES
CANCEL

2. For each code you want to set up, fill in information in the following columns of the grid:
   - Code - Enter a unique shipment code. Note that you cannot change the value in this column for any code that is already set up.
   - Description - Enter a description of the code for reference.
3. Click **UPDATE SHIPMENT CODES**.

Defining Shipment Rules

After you have set up all the shipment codes that apply to a rule, you can set up the shipment rule itself, assign its shipment codes, and select its default code.

1. In the Shipment Rules page, click **NEW SHIPMENT RULE**. The New Shipment Rule page displays.

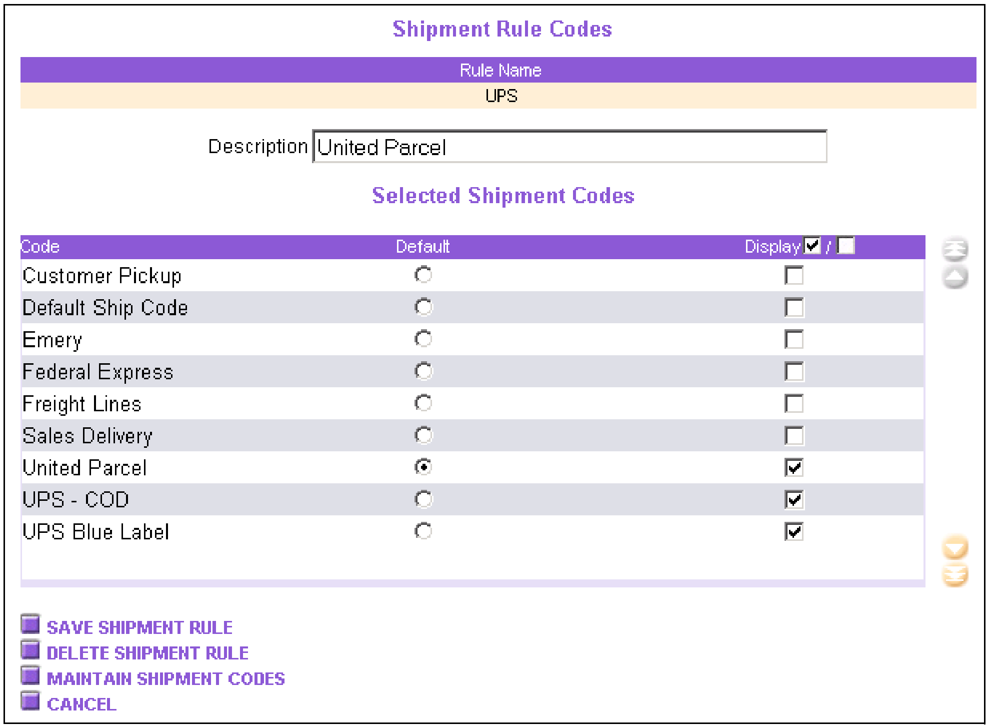


2. Fill in information in the following fields:
   - Rule - Enter a unique name for the shipment rule.
   - Description - Enter a description of the shipment rule for reference.
3. The Selected Shipment Codes grid contains all the shipment codes that have been defined. In the Display column, select the check box of each code you want to assign to the rule. Note that if the Display check box is already selected for a code, that code is currently assigned to the rule.
4. In the Default column, select the option button of the code to be used as the default one for this rule. On the CRM Web site, the code you select here will be selected by default when customers who are assigned this shipment rule place orders.
5. Click **SAVE SHIPMENT RULE**. You are returned to the Shipment Rules page.

Removing Codes from a Shipment Rule

If a shipment code no longer applies to a shipment rule, follow these steps to remove it from the rule:

1. In the left-most column of the grid in the Shipment Rules page, click the link of the rule you want to work with. The Shipment Rule Codes page displays.



2. In the Selected Shipment Codes grid, clear the check box in the Display column of each code you want to remove from the rule.
3. Click **SAVE SHIPMENT RULE**. You are returned to the Shipment Rules page.

Deleting a Shipment Code

If you no longer use a shipment code, you can delete it; however, you must first remove it from all the shipment rules it is currently assigned to (see the previous procedure).

1. In the Shipment Rules page, click **MAINTAIN SHIPMENT CODES**. The Shipment Codes page displays.
2. In the grid, select the Delete check box of each code you want to delete.
3. Click **UPDATE SHIPMENT CODES**.

Deleting a Shipment Rule

If you no longer use a shipment rule, you can delete it. Follow these steps:

1. In the Shipment Rules page, click the link in the left-most column of the rule you want to delete. The Shipment Rule Codes page displays.
2. Click **DELETE SHIPMENT RULE**. The rule is immediately deleted, and you are returned to the Shipment Rules page.

Payment Rules

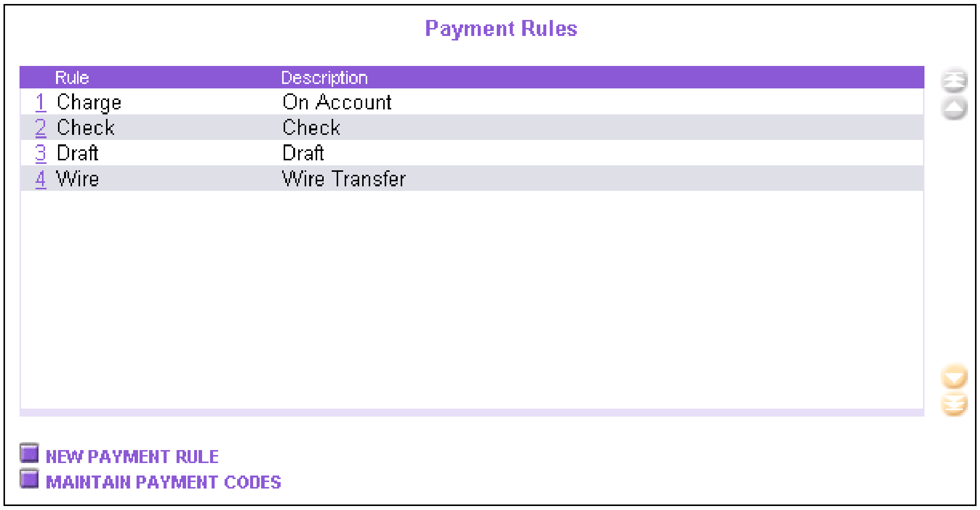
A payment rule determines the various methods customers can use to pay for orders they place in CRM. The rule that's assigned to each customer determines which payment methods are available to that customer.

Before creating a payment rule, first define all the payment codes (payment methods) that apply to the rule.

Accessing Payment Rules

1. On the Application Administration Web, click the **Order** tab.

2. On the sidebar, click **Rules>Payment Rules**. The Payment Rules page displays.

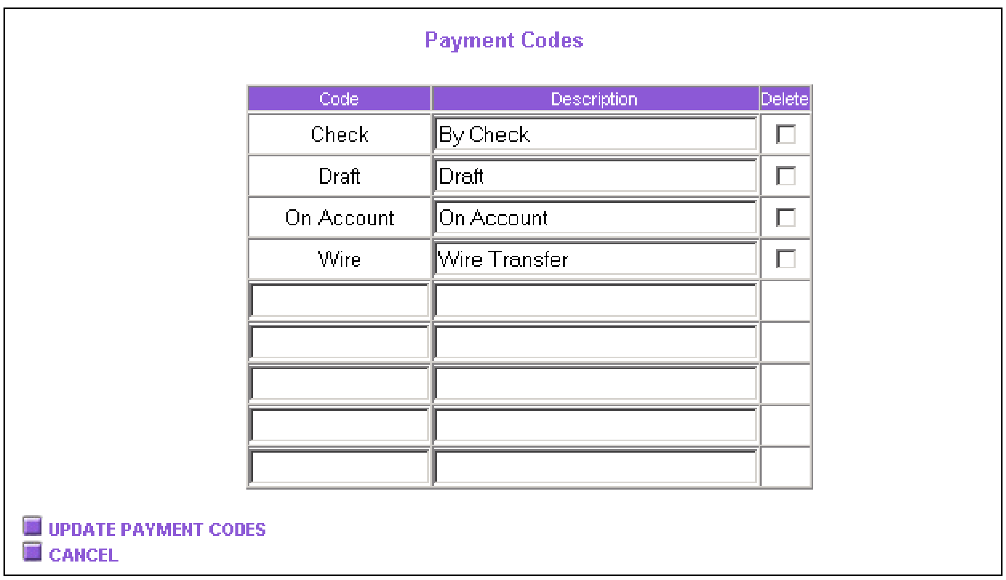


Defining Payment Codes

A payment code defines a method customers may use to pay for orders they place through CRM.

After setting up payment codes, assign them to the applicable payment rules. A customer's assigned code determines which payment methods are available to that customer.

1. In the Payment Rules page, click **MAINTAIN PAYMENT CODES**. The Payment Codes page displays.

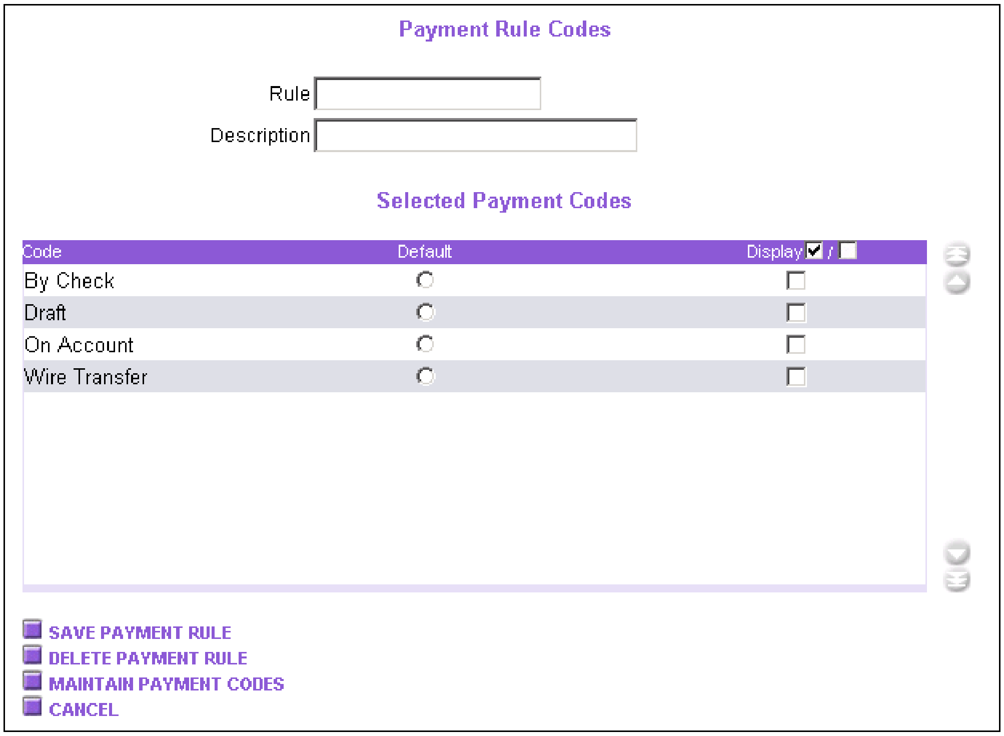


2. For each code you want to set up, fill in information in the following columns of the grid:
   - Code - Enter a unique payment code. Note that you cannot change the value in this column for any code that is already set up.
   - Description - Enter a description of the code for reference.
3. Click **UPDATE PAYMENT CODES**.

Defining Payment Rules

After you have set up all the payment codes that apply to a rule, you can set up the payment rule itself, assign its payment codes, and select its default code.

1. In the Payment Rules page, click **NEW PAYMENT RULE**. The Payment Rule Codes page displays.



2. Fill in information in the following fields:
   - Rule - Enter a unique name for the payment rule.
   - Description - Enter a description of the payment rule for reference.
3. The Selected Payment Codes grid contains all the defined payment codes. In the Display column, select the check box of each code you want to assign to the rule. Note that if the Display check box is already selected for a code, that code is currently assigned to the rule.
4. In the Default column, select the option button of the code to be used as the default one for this rule. On the CRM Web site, the code you select here will be selected by default when customers who are assigned this payment rule place orders.
5. Click **SAVE PAYMENT RULE**. You are returned to the Payment Rules page.

Removing Codes from a Payment Rule

If a payment code no longer applies to a rule, follow these steps to remove it from the rule:

1. In the Payment Rules page, click the link in the left-most column of the rule you want to work with. The Payment Rule Codes page displays.
2. In the Display column of the Selected Payment Codes grid, clear the check box of each code you want to remove from the rule.
3. Click **SAVE PAYMENT RULE**. You are returned to the Payment Rules page.

Deleting a Payment Code

If you no longer use a payment code, you can delete it; however, you must first remove it from all the payment rules it is currently assigned to (see the previous procedure).

1. In the Payment Rules page, click **MAINTAIN PAYMENT CODES**. The Payment Codes page displays.
2. In the grid, select the Delete check box of each code you want to delete.

3. Click **UPDATE PAYMENT CODES**.

Deleting a Payment Rule

If you no longer use a payment rule, you can delete it. Follow these steps:

1. In the Payment Rules page, click the link in the left-most column of the rule you want to delete. The Payment Rule Codes page displays.
2. Click **DELETE PAYMENT RULE**. The rule is immediately deleted, and you are returned to the Payment Rules page.

Confirmation Rules

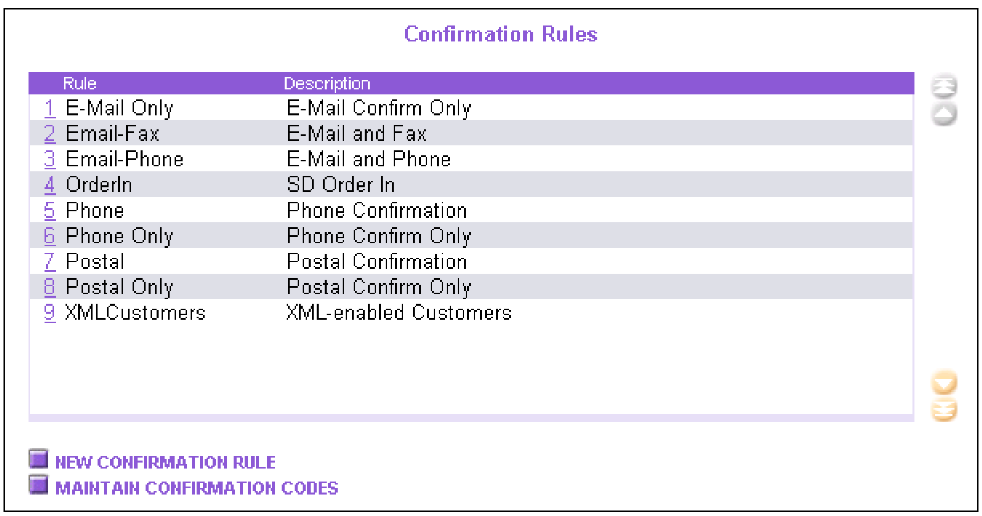
A confirmation rule determines the various methods that can be used to deliver confirmations to customers for orders they placed through CRM. For example, you might send confirmations by e-mail or fax.

Several confirmation rules are predefined for you in the Application Administration Web. You can elect to use only the predefined rules, or you can create your own ones. Before creating a confirmation rule, however, first define all the confirmation codes (delivery methods) that apply to it.

A customer’s assigned confirmation rule determines which methods are available for delivering order confirmations to that customer.

Accessing Confirmation Rules

1. On the Application Administration Web, click the **Order** tab.
2. On the sidebar, click **Rules>Confirmation Rules**. The Confirmation Rules page displays.



Confirmation Rules

Rule	Description
1 E-Mail Only	E-Mail Confirm Only
2 Email-Fax	E-Mail and Fax
3 Email-Phone	E-Mail and Phone
4 OrderIn	SD Order In
5 Phone	Phone Confirmation
6 Phone Only	Phone Confirm Only
7 Postal	Postal Confirmation
8 Postal Only	Postal Confirm Only
9 XMLCustomers	XML-enabled Customers

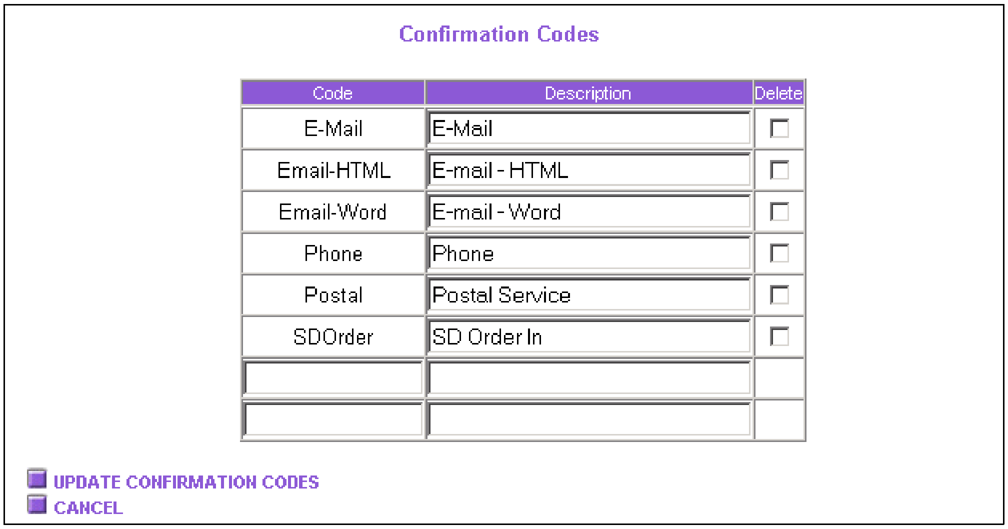
NEW CONFIRMATION RULE
MAINTAIN CONFIRMATION CODES

Defining Confirmation Codes

A confirmation code defines a method that might be used to deliver an order confirmation to a customer. If you are creating your own confirmation rules, you first need to define the codes that comprise the rule.

After setting up confirmation codes, you can assign them to confirmation rules. A customer’s assigned confirmation rule determines what confirmation methods can be used to deliver order confirmations to that customer.

1. In the Confirmation Rules page, click **MAINTAIN CONFIRMATION CODES**. The Confirmation Codes page displays.

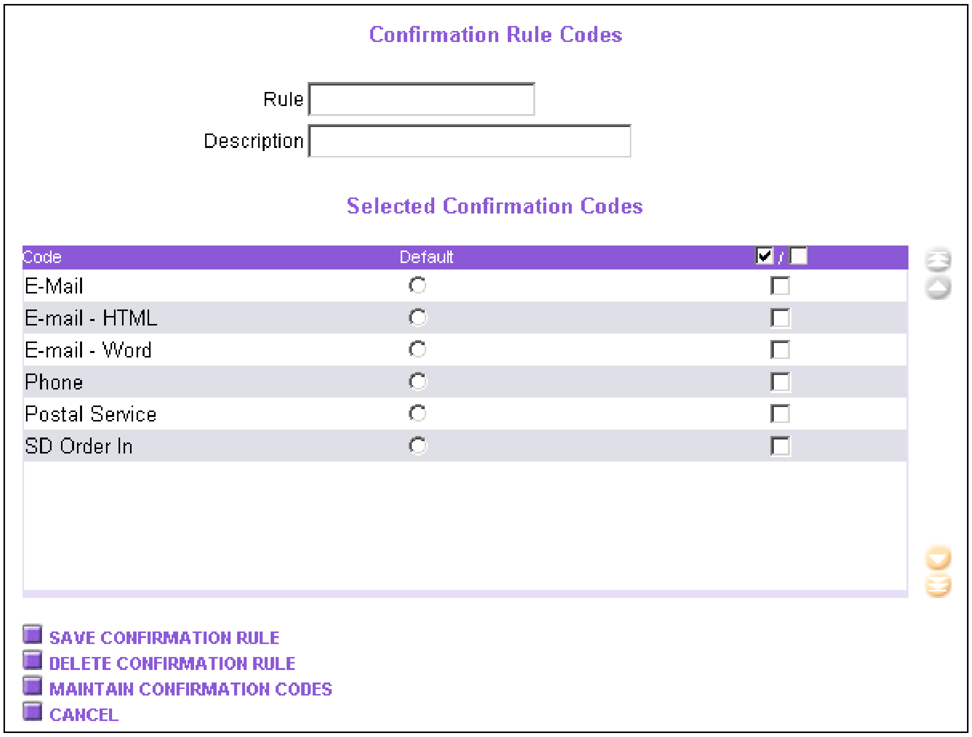


2. For each code you want to set up, fill in information in the following columns of the grid:
   - Code - Enter a unique confirmation code. Note that you cannot change the value in this column for any code that is already set up.
   - Description - Enter a description of the code for reference.
3. Click **UPDATE CONFIRMATION CODES**. You are returned to the Confirmation Rules page.

Defining Confirmation Rules

After you have set up all the confirmation codes that apply to a rule, you can set up the confirmation rule itself, assign its confirmation codes, and select its default code.

1. In the Confirmation Rules page, click **NEW CONFIRMATION RULE**. The Confirmation Rule Codes page displays.



2. Fill in information in the following fields:
   - Rule - Enter a unique name for the confirmation rule.
   - Description - Enter a description of the confirmation rule for reference.
3. The Selected Confirmation Codes grid contains all the confirmation codes that have been defined. Select the check box in the right-most column of each code you want to assign to the rule.

   > **NOTE:** If the check box in the right-most column is already selected for a code, that code is currently assigned to the rule.

4. In the Default column, select the option button of the default code for this rule. On the CRM Web site, the code you select will be displayed by default when customers who are assigned this confirmation rule place orders.
5. Click **SAVE CONFIRMATION RULE**. You are returned to the Confirmation Rules page.

Removing Codes from a Confirmation Rule

If a confirmation code no longer applies to a confirmation rule, follow these steps to remove it from the rule:

1. In the Confirmation Rules page, click the link in the left-most column of the rule you want to work with. The Confirmation Rule Codes page displays.
2. In the right-most column of the Selected Confirmation Codes grid, clear the check box of each code you want to remove from the rule.
3. Click **SAVE CONFIRMATION RULE**. You are returned to the Confirmation Rules page.

Deleting a Confirmation Code

If you no longer use a confirmation code, you can delete it; however, you must first remove it from all the confirmation rules it is currently assigned to (see the previous procedure).

1. In the Confirmation Rules page, click **MAINTAIN CONFIRMATION CODES**. The Confirmation Codes page displays.
2. In the grid, select the Delete check box of each code you want to delete.
3. Click **UPDATE CONFIRMATION CODES**.

Deleting a Confirmation Rule

If you no longer use a confirmation rule, you can delete it. Follow these steps:

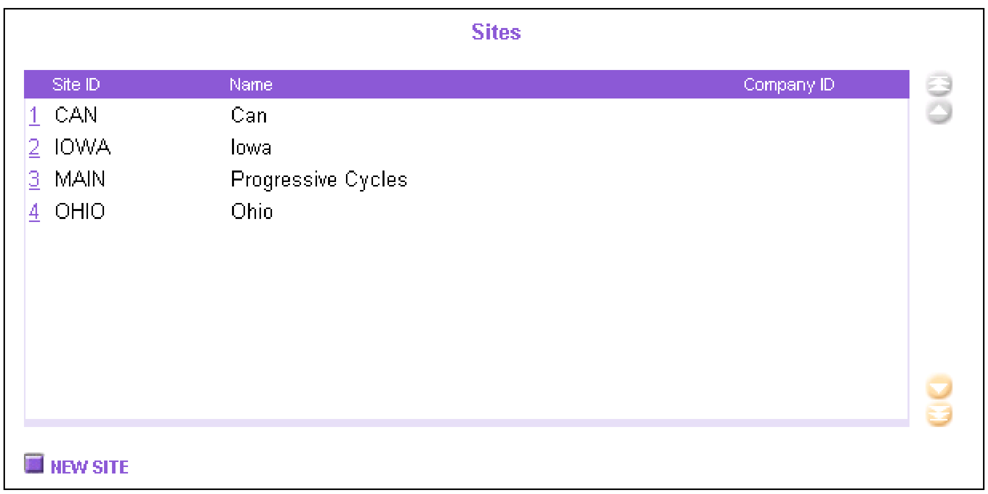
1. In the Confirmation Rules page, click the link in the left-most column of the rule you want to delete. The Confirmation Rule Codes page displays.
2. Click **DELETE CONFIRMATION RULE**. The rule is immediately deleted, and you are returned to the Confirmation Rules page.

Sites

For each site that supplies products to your customers, you need to identify its address and phone information, and the ID of the company at that site.

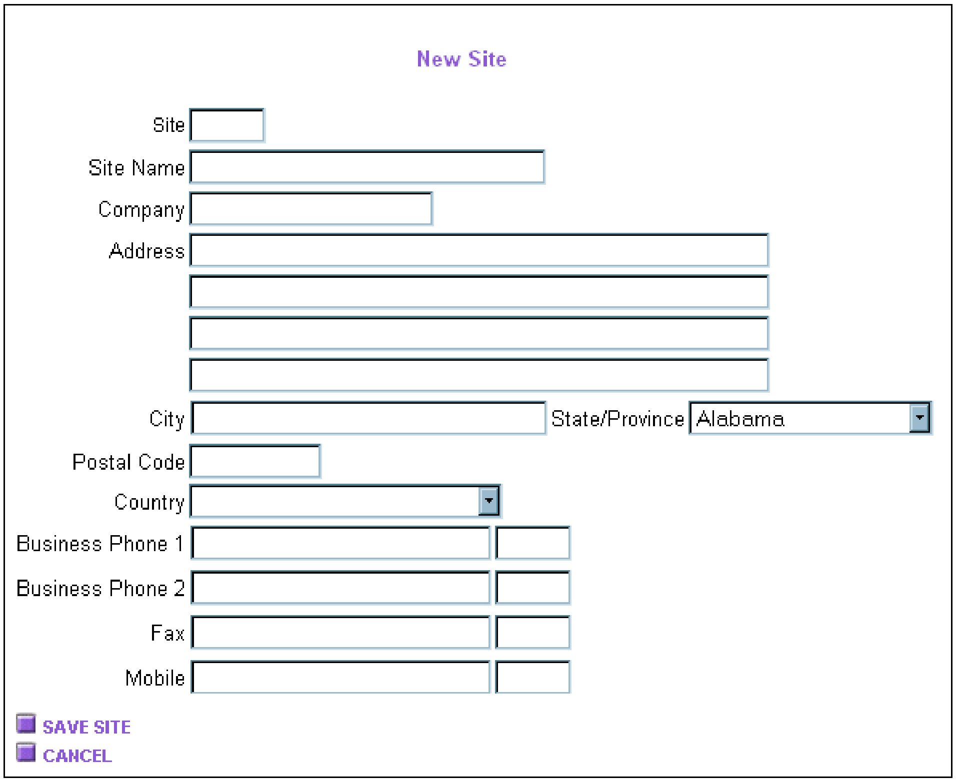
Accessing Sites

1. On the Application Administration Web, click the **Order** tab.
2. On the sidebar, click **Site**. The Sites page displays.



Defining a Site

1. In the Sites page, click **NEW SITE**. The New Site page displays.



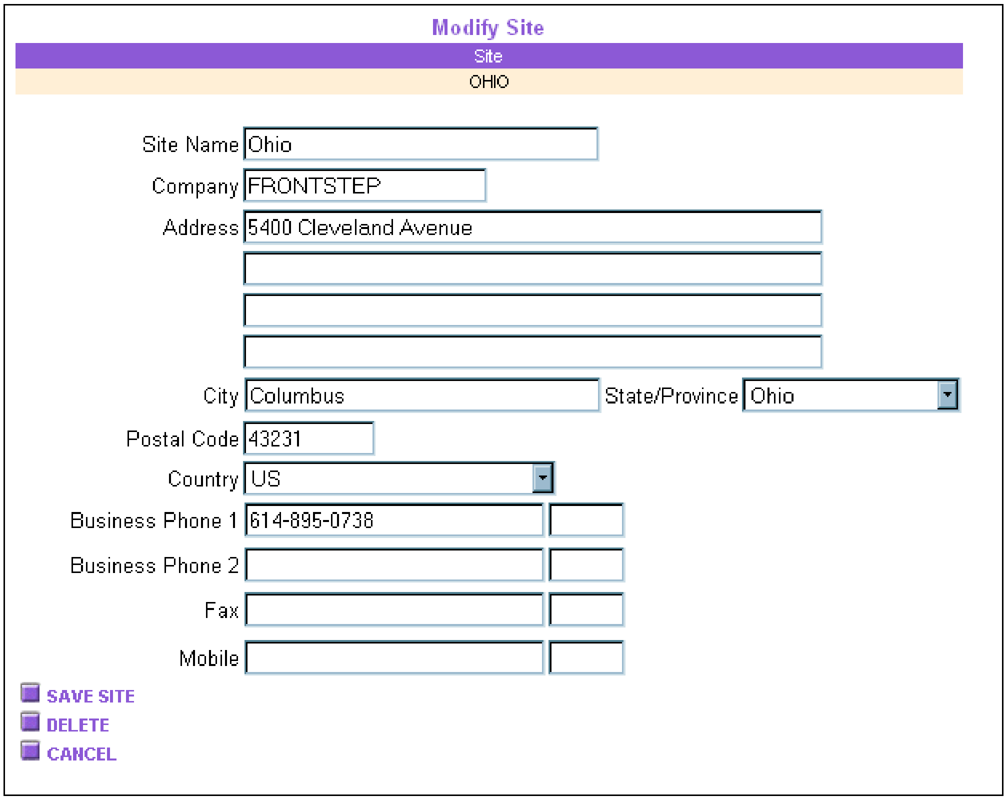
2. Fill in information in the following fields:

   - Site - Enter a unique ID for the site you are adding. If you are defining a Supply Chain site, the site ID must match the site ID that is defined in the Intelligent Sourcer database's Site table. CRM uses this default site if Intelligent Sourcer is unable to determine a sourcing site for a line item on an order, or if you are not using Intelligent sourcer but have multiple sites that can provide availability information.
   - Site Name - Enter the name of the site.
   - Company - Enter the name of the company at this site.
   - Address - Enter the address of the company at this site.
   - City - Enter the city where the site is located.
   - State/Province - Select the state or province where the site is located.
   - Postal Code - Enter the ZIP or postal code of the site.
   - Country - Select the country where the site is located.
   - Business Phone 1/Business Phone 2 - You can enter up to two business phone numbers (and extensions, if applicable) at this site.
   - Fax - Enter the fax number (and extension, if applicable) at this site.
   - Mobile - Enter the mobile phone number (and extension, if applicable) at this site.

3. Click **SAVE SITE**.

Modifying Site Information

1. The grid on the Sites page lists all the sites that have been defined. In the left-most column, click the link of the site you want to work with. The Modify Site page displays.



2. You can change information in the following fields:
   - Site Name - Enter the name of the site.
   - Company - Enter the name of the company at this site.
   - Address - Enter the address of the company at this site.
   - City - Enter the city where the site is located.
   - State/Province - Select the state or province where the site is located.
   - Postal Code - Enter the ZIP or postal code of the site.
   - Country - Select the country where the site is located.
   - Business Phone 1/Business Phone 2 - You can enter up to two business phone numbers and their extensions (if applicable) at this site.
   - Fax - Enter the fax number and extension (if applicable) at this site.
   - Mobile - Enter the mobile phone number and extension (if applicable) at this site.
3. Click **SAVE SITE** to save your changes.

Deleting a Site

If you no longer use a supply site, you can delete it. Follow these steps:

1. The grid on the Sites page lists all the sites that have been defined. In the left-most column, click the link of the site you want to delete. The Modify Site page displays.
2. Click **DELETE**.

System Order Pads

An order pad is a predefined list of products, which customers can use to quickly and repeatedly place orders. It consists of a title, a description, start and end dates, requested ship and delivery dates, and one or more products.

Two types of order pads are available:

- System order pads – This type of order pad is available to all accounts. For example, you might create a Monthly Promotional Items order pad, containing only promotional items that change on a monthly basis.

  You can create System order pads only in the Application Administration Web.

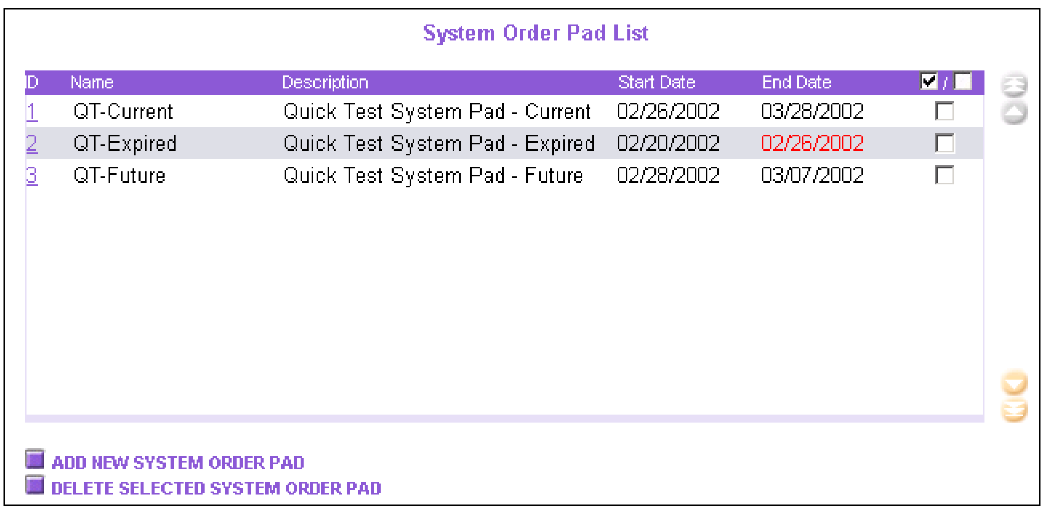
- Account-specific order pads – This type of order pad is available only to a specific customer account. For example, it might contain products that the customer orders on a weekly or monthly basis.

  Customers can create account-specific order pads only in CRM; see the *MAPICS CRM/Customer Center User's Guide* for assistance.

An order pad automatically expires when its end date is older than the current system date.

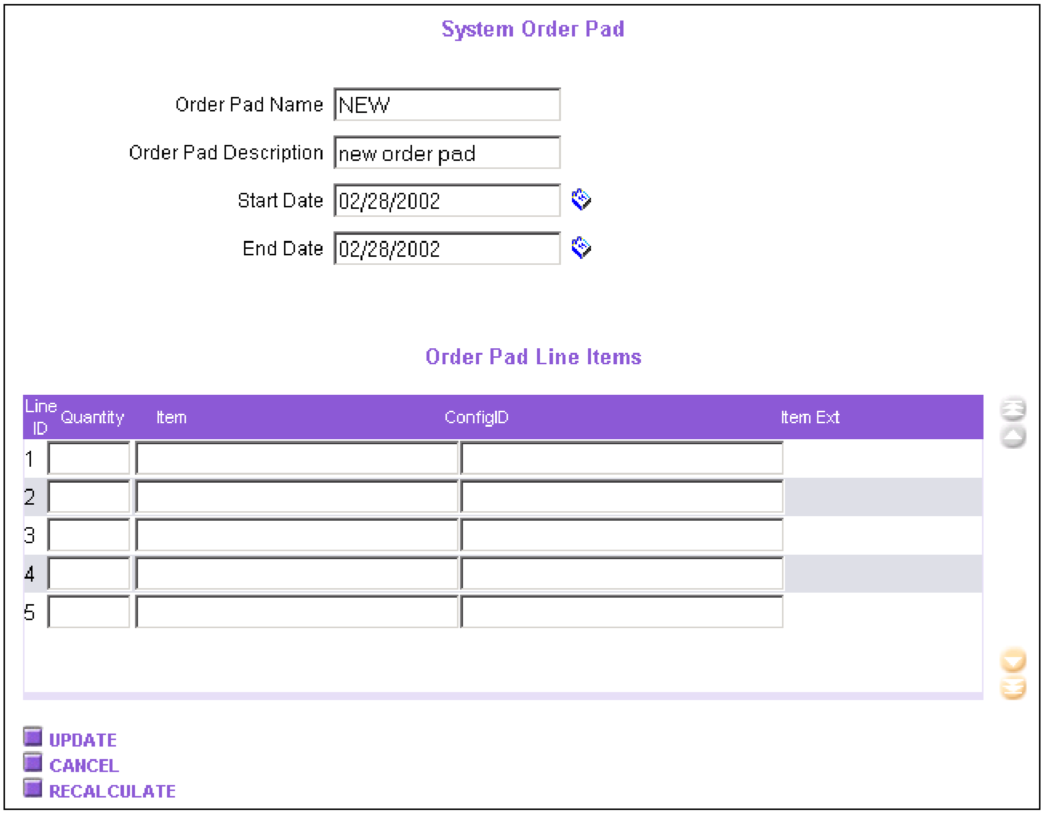
Accessing System Order Pads

1. In the Application Administration Web, click the **Order** tab.
2. On the sidebar, click **System Order Pads**. The System Order Pad List page displays.



Creating a System Order Pad

1. In the Order Pad List page, click **ADD NEW SYSTEM ORDER PAD**. The System Order Pad page displays.



2. Fill in information in the following fields:
   - Order Pad Name - Enter a unique name for the order pad.
   - Order Pad Description - Enter a description of the order pad for reference, such as **Monthly Promotions**.
   - Start Date - Enter the date when customers can begin using the order pad, or click to select the date from the calendar.
   - End Date - Enter the last date the order pad will be available, click to select the date from the calendar, or leave this field blank if you do not want the order pad to expire.
3. For each product you want to add to the order pad, fill in information in the following columns of the Order Pad Line Items grid:
   - Quantity - Enter the standard order quantity of the item.
   - Item - Enter the item number of the product.
   - ConfigID - If the product is configurable, enter its configuration ID.
   - Item Ext - This field is available only if you have activated it for the environment. Enter the extended item number of the product, such as the manufacturer code.
4. Click **UPDATE**.

Modifying a System Order Pad

If necessary, you can change a System order pad by:

- Adding items to it
- Removing items from it
- Changing the quantity of an existing item
- Assigning a configuration ID to a configurable item

1. In the left-most column of the grid in the System Order Pad List page, click the link of the order pad you want to modify. The System Order Pad page displays.
2. In the upper part of the page, you can change information in the following fields:
   - Order Pad Name - Enter a unique name for the order pad.
   - Description - Enter a description of the order pad for reference, such as **Monthly Promotions**.
   - Start Date - Enter the date when customers can begin using the order pad, or click to select the date from the calendar.
   - End Date - Enter the last date the order pad will be available, click to select the date from the calendar, or leave this field blank if you do not want the order pad to expire.
3. In the Order Pad Line Items grid, enter information in the following columns:
   - Quantity - Enter the standard order quantity of the item. If you want to remove a line from the order pad, set its quantity to **0**.
   - Item - If you are adding a line, enter the item number of the product. If you are modifying a line, the item number is displayed and you cannot change it.
   - ConfigID - If the product is configurable, enter its configuration ID.
   - Item Ext - This field is available only if you have activated it for the environment. Enter the extended item number of the product (such as the manufacturer code).
4. If you changed the quantity of an item, click **RECALCULATE**.
5. When you are finished, click **UPDATE**.

Deleting a System Order Pad

If you no longer need to use a System order pad, you can delete it.

NOTE

A System order pad whose end date has been reached will automatically be removed for you.

1. In the right-most column of the grid in the System Order Pad List page, select the check box of each order pad you want to delete.
2. Click **DELETE SELECTED SYSTEM ORDER PAD**.

10

Users

This chapter applies to MAPICS Customer Center.

The Users tab on the Application Administration Web allows you to:

- create new user profiles
- maintain current user profiles
- search for users
- cross reference users to customer bill-to records.

There is no synchronization of the user information from MAPICS CRM or any back-end system.

User Administration

When you select the Users tab on the Application Administration Web, the following options are available:

- **Users** – Displays the **Users** page, where you can set up and maintain user profiles.
- **Users X-Ref** – Displays the **Users X-Ref** page, where you set up and maintain cross-references between users and their associated customers.

About User Roles

A user's role determines what settings apply to that user, including the available navigation options, functionality, security privileges, and so on. You must first set up the roles in the System Administration Web before you can assign them to user profiles.

When new users go through the Guest Logon process, they will be assigned to the IOE_NEW_USER_ROLE setting, which defaults to "GuestUser." You can update their user profile to assign a different role.

The following table shows the default roles as shown in the System Administration Web and their corresponding setting in the Application Administration Web:

System Administration Web Setting	Application Administration Web Setting
Administrator	System Administrators
CustomerService	Customer Service Reps
GuestUser	Guest Users
User	General Users

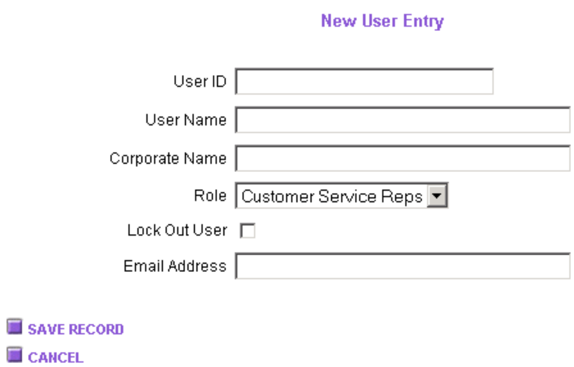
Creating a New User Profile

You can manually add user profiles to the Customer Center web site. This task may be performed by an internal user (that is, a user of the company that hosts the web site), or by a customer’s user who has the appropriate security privileges. The nature of the web site requires that you decide who does what, and coordinate this process with your customers.

Although new users can log on to the web site and create their own profiles by going through the Guest Logon process, they will be prompted to set up a corresponding ship-to/ bill-to record, which will also create the user cross-reference record. If they place orders, the system will create customer profiles for them (based on the order information they provide). Therefore, you must set up the users’ profiles and their customer associations before the users begin placing orders on the web site. See "Cross Referencing Users to Customer Bill-To Records" on page 10-4 for information about associating users with customers.

To create a user profile, do the following:

1. Click **NEW USER** on the **Users** page. A new profile form displays for recording the user’s information.

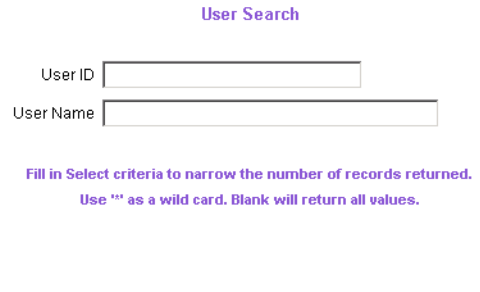


2. Enter information in the following fields:
   - User ID - Assign a unique User ID for logging on to the web site.
   - Enter the User Name - This name will be displayed in the Log On area when the user successfully logs on to the MAPICS Customer Center web site.
   - Corporate Name - Enter the company’s name.
   - Role - The user’s role also defaults from your profile. The role will determine the user’s workspace settings, which in turn will determine their available navigation, functionality, security privileges, and so on. You can select a different group from the Role field, if necessary.
   - Lock Out User - This check box allows you to temporarily prevent the user from gaining access to the web site.
   - Email Address - This field is required so that the system can automatically send an email to the user when processing a forgotten-password request.
3. Click **SAVE RECORD**. A message displays when the profile has been successfully added.

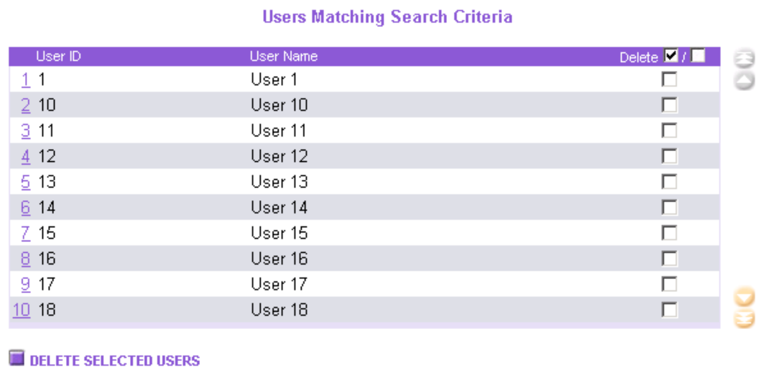
Searching for Users

To search for users, you have two fields you can use: User Name and User ID. To search for a user, do the following:

1. On the User Search page, enter the criteria to narrow the number of records to view. You can use '*' as a wild card. Leaving a field blank will display all values.



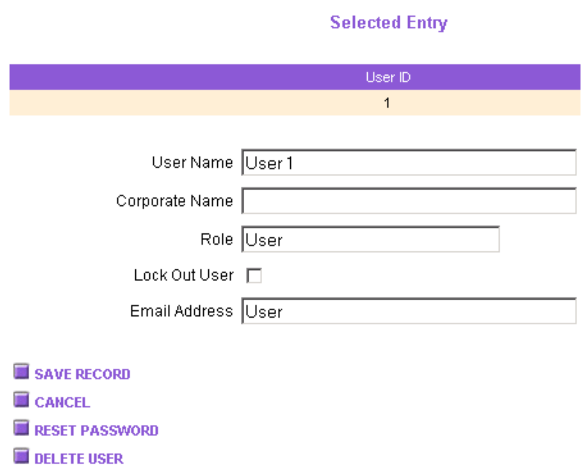
2. Click **SEARCH**. The Users Matching Search Criteria section displays.


Users Matching Search Criteria

	User ID	User Name	Delete
1	1	User 1	
2	10	User 10	
3	11	User 11	
4	12	User 12	
5	13	User 13	
6	14	User 14	
7	15	User 15	
8	16	User 16	
9	17	User 17	
10	18	User 18	

DELETE SELECTED USERS

3. Select the record number to view the user profile. The Selected Entry page displays.



Locking Out Users

You may have to prevent users from accessing MAPICS Customer Center. To lock them out, do the following:

1. Search for the user's profile.
2. Select the user profile.
3. Select the Lock Out User check box.
4. Click **SAVE RECORD**.

Assigning User Passwords

Most users will be able to change their own passwords. New users are created with the password set to the value of the DefaultPassword setting.

Users with full access rights for user profile administration will be able to change the password of other users.

Do one of the following:

- To change your own password, click **RESET PASSWORD** to display the Reset Password page.
- To change another user's password, first select that user's ID from the **User ID** selection list; then, click **RESET PASSWORD** to display the Reset Password page.

The password will be reset to the value of the "DefaultPassword" setting.

Modifying User Profiles

Most users will be able to modify their own profiles. In addition, users with full access rights for user profile administration will be able to update other users' profiles.

1. To change another user's profile and you have the access rights to do so, first select that user's ID from the User ID selection list.
2. You make the changes directly in the Selected Entry page. You can change the value in any field, except the User ID field.
3. When you have finished making changes, click **SAVE RECORD**. A message displays when the profile has been successfully updated.

Removing User Profiles

When a user no longer requires access to the web site—because, for example, he or she has left the company—you can delete that user's profile.

1. Select the user from the User ID selection list. The Selected Entry page displays.
2. Click **DELETE USER**. A message displays when the profile has been successfully deleted.

Cross Referencing Users to Customer Bill-To Records

When a new user to the web site places an order, a new customer profile is automatically created, and the user is immediately associated with it.

In order to cross reference users to customers, both the user you want to use and the customer bill-to records must be stored.

For each of the customer's additional users, you do not want a new customer profile created; instead, you need to associate the users with that customer's profile. You do so on the **Users X-Ref** page.

Once you have created an association between a user and a customer, the next time the user logs in to the web site, the ID of that customer will be displayed in the Log On area, and all work the user performs will be on behalf of that customer. To create the bill-to reference, do the following:

1. On the Application Administration Web, click the **Users** tab.
2. On the sidebar, click **Users X-Ref**.The User Search page displays.
3. Select that user's ID from the **User ID** selection list. The Selected Entry page displays.

4. Click **ADD BILL TO RECORDS**. A Bill-To Search page displays for creating the cross-reference.
5. Search for the customers to cross reference. The Bill-To XRef Records for User page displays.
6. Select the check box of the customer you want to cross reference. You can select more than one customer.
7. Click **ADD SELECTED USERS**.
8. The **Bill To XRef Records** page redisplays, and the selection list is updated with that customer's ID.

Removing a Customer Cross-Reference

To remove a user's customer cross-reference:

1. Select that user's ID from the User ID selection list to display the cross references.
2. Select the check box of the company you want to remove.
3. Click **DELETE SELECTED USERS**.

The page refreshes with the list of current Bill-To Xref users.

User Setup Checklist

This checklist shows the steps that need to be followed to manually add a user to the web site. Typically, this task is performed by your customer's administration user or by your internal service personnel.

Step	Notes
1. Log on with a user account that has privileges to set up user profiles.	The predefined CustomerService role has these privileges; See "Roles" on page 14-9 for more information.
2. Add the user's profile.	See "Creating a New User Profile" on page 10-2 for instructions. Note that the user's group must already be set up.
3. Assign the user's customer cross-reference.	See "Cross Referencing Users to Customer Bill-To Records" on page 10-4 for instructions. Note that the customer record must already exist. Customer records can be uploaded from your ERP system or the Application Administration Web; they are also automatically created when a guest user submits an order. You can associate a single user with multiple customers.
4. Let the user know his or her user ID and password.	Users must log on to the web site before they can submit orders.
5. Have the user log on to the web site with his or her user ID and password to ensure that access is successful.	At this time, you should verify that the user has access only to the appropriate functionality.
6. Recommend that the user change his or her password.	Users can change their passwords only if they have privileges to modify their own user profiles.

11

User Extended Tables

UET (User Extended Table) fields are user-definable for tracking data that is not contained in the CRM database.

You can define custom fields for the following database tables:

Database	Table
Order Status	HeaderUserAttributes
	LineShipStatusUserAttributes
	LineUserAttributes
	PartyUserAttributes
Pricing	AccountPriceList
	Agreement
	PriceCodeList
	ProductPriceList
	TransactionDetail
Product	Product Catalog

NOTE: Examples in this chapter show Pricing only.

The data types that are supported for UET fields include:

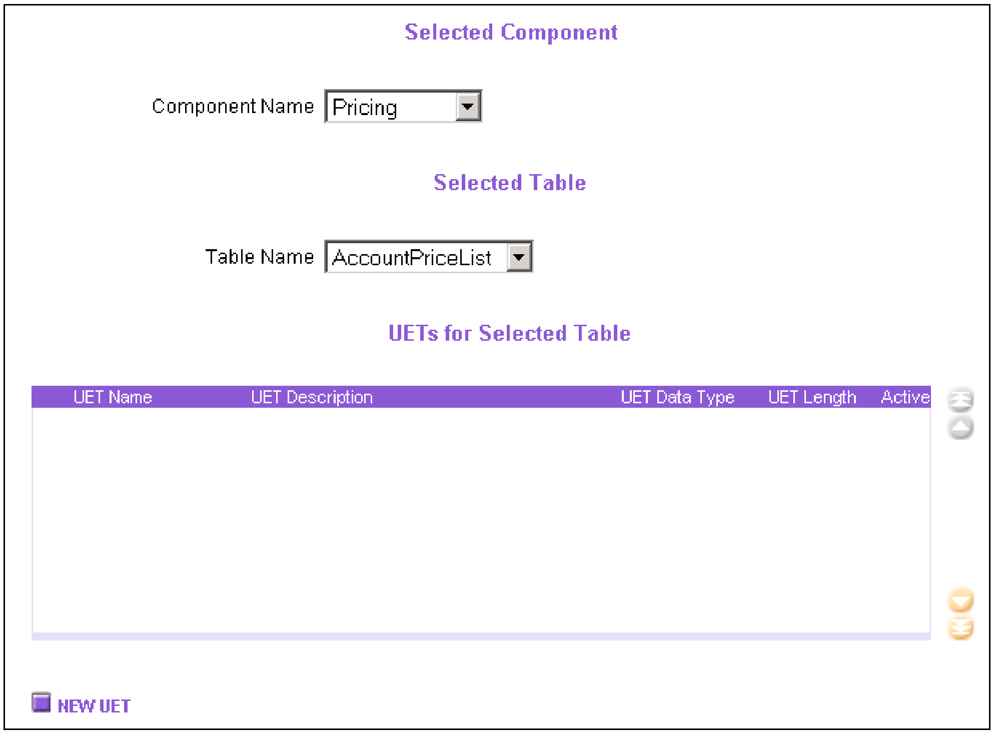
- Integer
- Number
- Text

Date/time and image data types are not currently supported.

Accessing User Extended Tables

1. On the System Administration Web, click the **UET** tab.
2. On the sidebar, click **User Extended Tables**. The Select Component page displays.

3. In the Component Name field, select the component for which you want to define a UET. The Selected Component page displays.



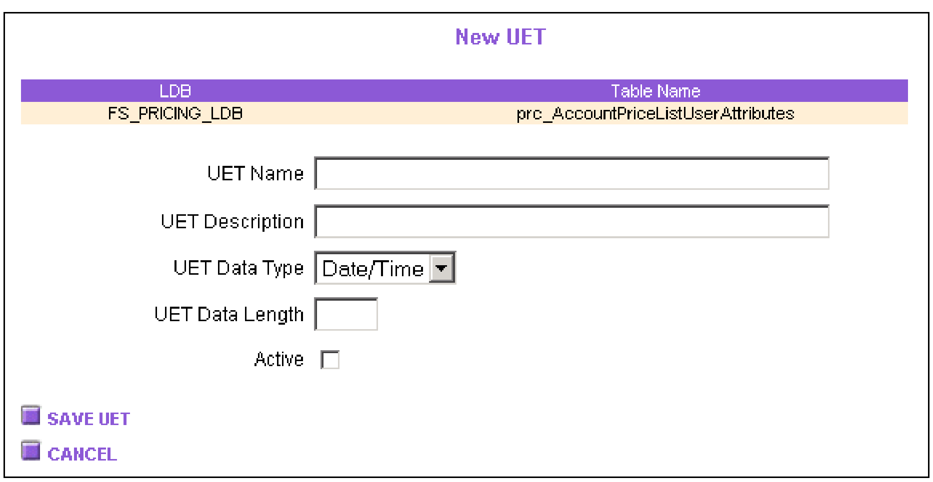
Defining a UET

You can define UET fields for each of the tables listed in the introduction to this chapter. For each field, you identify its name, description, data type and length.

NOTE: If a UET field needs to be restricted to certain values, use the UET Fields Valid Values functionality to set them up (see Chapter 12, "UET Field Valid Values").

If you no longer need a UET field, you can inactivate it. You cannot, however, delete it.

1. After selecting a component and table, click **NEW UET**. The New UET page displays.



2. Fill in information in the following fields:
   - UET Name - Enter the name of the UET field.

- UET Description - Enter the description of the field.
- UET Data Type - Select the data type of the field: **Integer**, **Number** or **Text**.

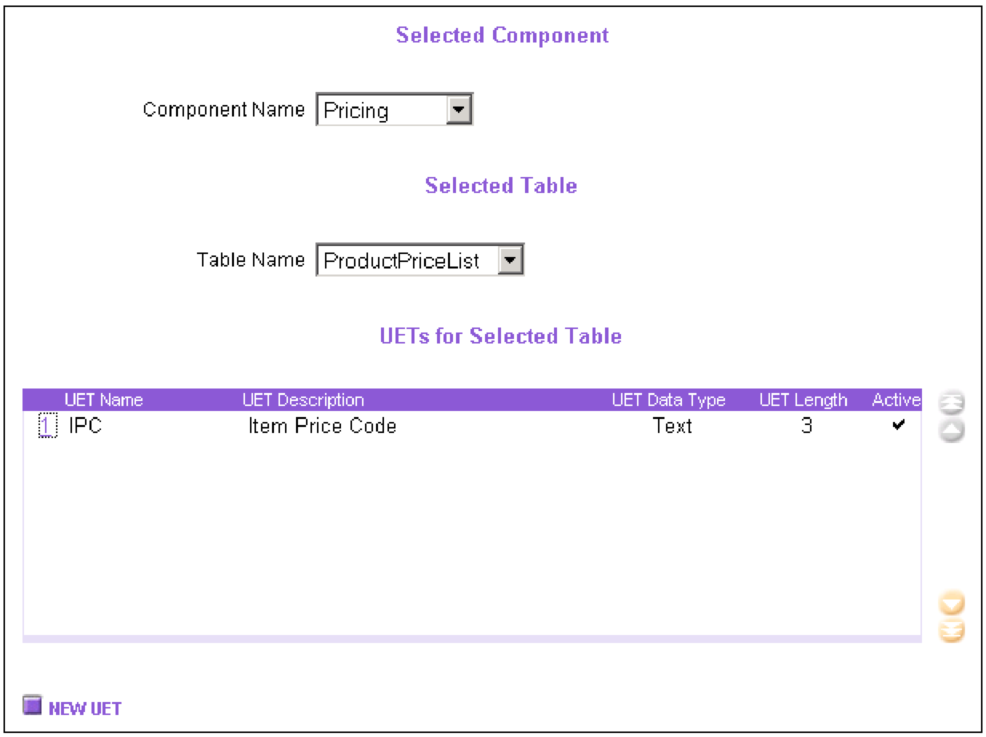
  Note: The other options in this selection list are not currently supported.
- UET Data Length - Specify the length of the field.
- Active - Select this check box to activate the field. This setting determines whether the system reads and/or writes data to this field in the database.

  Note: You cannot delete a field; you can, however, use this field to inactivate it.

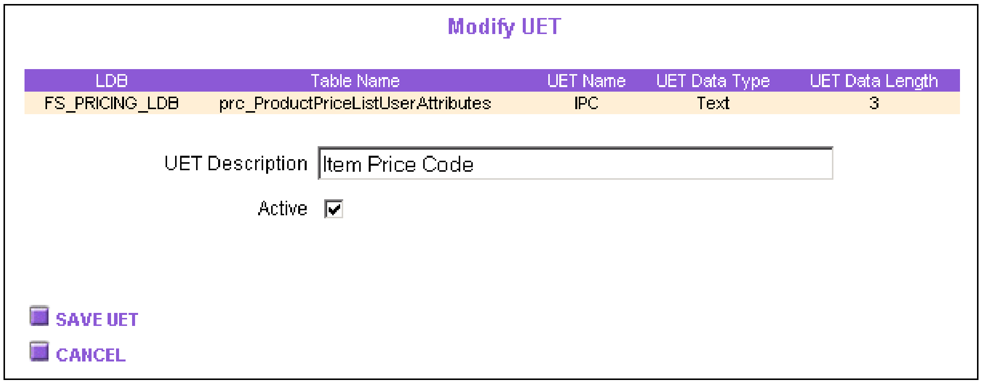
3. Click **SAVE UET**.

Selecting a UET Field

1. When you select a component in the Selected Component page, the Table Name field displays. Select the table that contains the field you want to work with. The page is updated with the UETs for Selected Table grid, which contains a list of all the UETs that have been defined for the table.



2. In the left-most column of the grid, click the link of the UET field you want to work with. The Modify UET page displays.



Modifying a UET Field

You can change only a UET field's description and activation flag.

1. In the Modify UET page, you can change the following information:
   - UET Description - Modify the description of the field.
   - Active - Select this check box to activate the field, or clear this check box to inactivate this field.
2. Click **SAVE UET**.

Inactivating a UET

Although you cannot delete a UET field once defined, you can inactivate it. Follow these steps:

1. In the Modify UET page, make sure that you are working with the correct UET.
2. Clear the Active check box.
3. Click **SAVE UET**.

12

Valid Values

Valid values enable you to define the allowable entries for fields in MAPICS CRM/Customer Center solutions. A field for which you establish valid values will accept only those values for entry.

For example, if you are using the Advanced Pricer, you need to define the list of acceptable price codes for the PriceCodeID field in the PriceCodeList table, representing the different types of customers you do business with.Then in the Advanced Pricer, you will be able to enter for price code fields only those values you defined for them.

You can define valid values for base fields and for UET (User Extended Table) fields. Base fields are installed with your base MAPICS product. UET fields are user-defined. For information about defining UET fields, see Chapter 11, “User Extended Tables."

Base Field Valid Values

Fields defined in the base product may or may not already have valid values defined for them.

> Some base fields have predefined values which are required for system processing. You cannot use the Valid Value pages in the System Administration Web to view or modify these values.
>
> Currently, base fields are supported only for the Pricing Component (Advanced Pricer).

If the Advanced Pricer is installed, you can modify or delete valid values for the following base fields:

Component Name	Table Name	Field Name
Pricing Component	AgreementAdj	AdjustmentCategory
	PriceCodeList	PriceCodeID
	QuantityBreak	PriceLevel

In addition, you can add valid values only for the following base fields in the Pricing Component (Advanced Pricer):

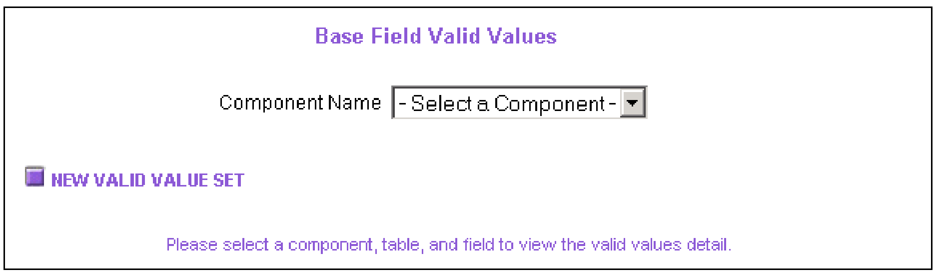
Table Name	Field Name
Account	AccountID
	AccountName
AccountPriceList	KeywordID
Agreement	AgreementID
	KeywordID
	GroupSequence
	NetPrice
	PriceUOM

Table Name	Field Name
AgreementAdj	AgreementID
	KeywordID
	GroupSequence
	Currency
	AdjustmentSequence
	AdjustmentCategory
	AdjustmentValue
AgreementEligibility	KeywordID
	GroupSequence
	AgreementSequence
	AgreementID
	AgreementKeywordID
AgreementEligibilityHeader	KeywordID
	GroupSequence
AgreementHeader	AgreementID
	Description
Formula	Description
	FirstValue1
	FirstValue2
	SecondValue1
	SecondValue2
	DecimalFactor
	Rounding
PriceCodeList	PartID
	PartIDExt
	BasePrice
	PricingUOM
Product	PartID
	PartIDExt
	Description
ProductPriceList	PartID
	PartIDExt
	KeywordID
	Weight
	WeightUOM

Table Name	Field Name
QuantityBreak	PriceListID
	PartID
	PartIDExt
	PriceCodeID
	Currency
	PriceLevel
	LowerBreak
	UpperBreak
	BreakUOM
	QuantityPrice

Accessing Base Field Valid Values

1. On the System Administration Web, click the **Valid Values** tab.
2. On the sidebar, click **Base Fields**. The Base Field Valid Values page displays.

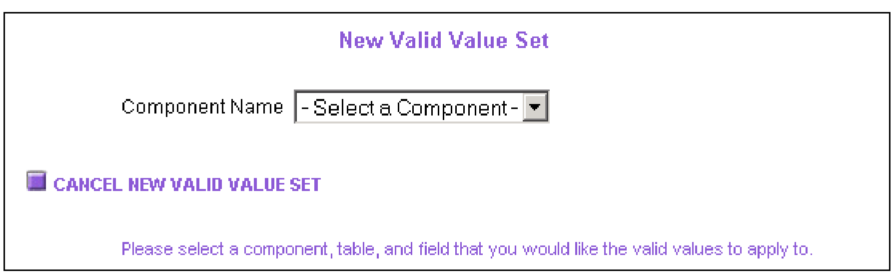


Adding a Base Field's Valid Value Set

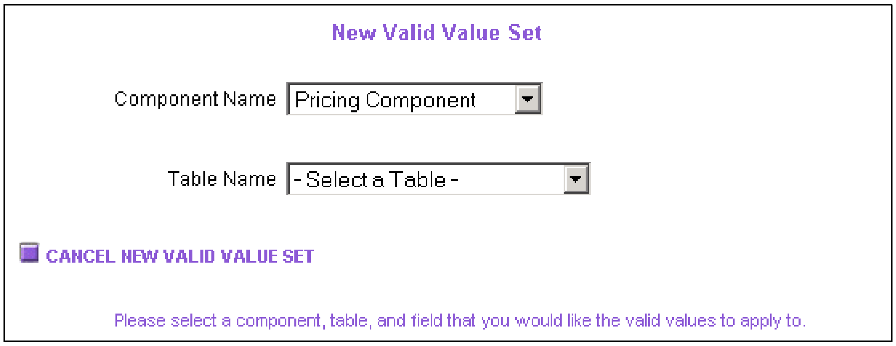
You can add a valid value set only for base fields for which valid values have not yet been defined. See the second table in "Base Field Valid Values" on page 12-1 for a list of the base fields you can define them for.

When you add valid values for a base field, you can either define unique values for it, or you can use another field's valid values. This feature can be extremely beneficial: not only does it save you time in setting up your values—because you set them up only once—it also prevents you from setting up more than one version of a value, such as a price code of **DLR** in one place and **dlr** in another.

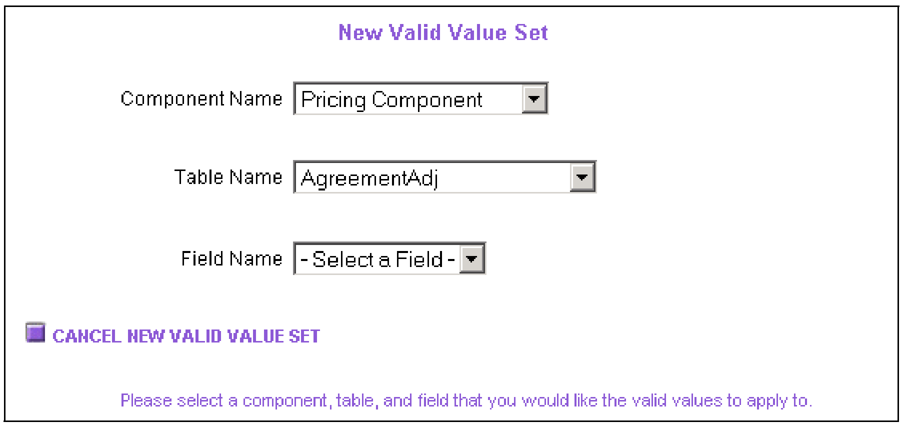
1. In the Base Field Valid Values page, click **NEW VALID VALUE SET**. The New Valid Values Set page displays.



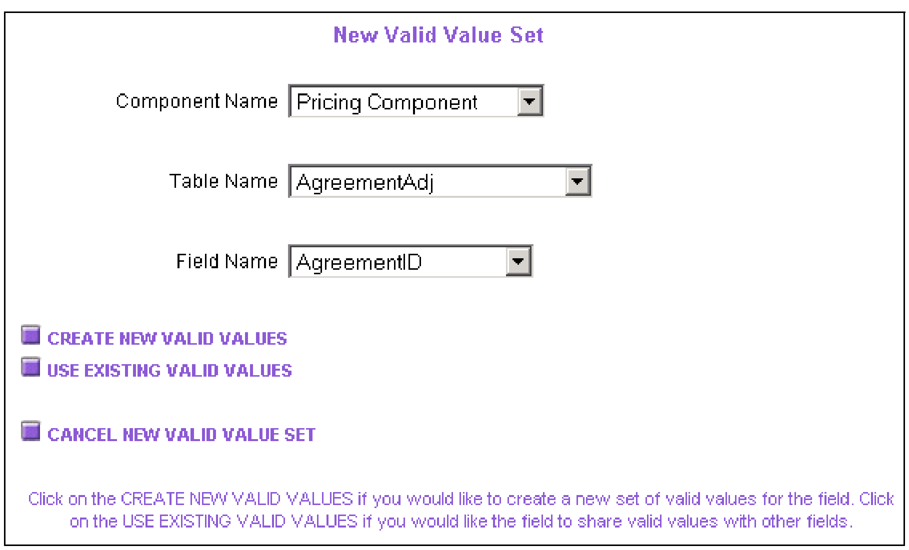
2. In the Component Name field, select the component in which the base field is located. The New Valid Values Set page is updated with the Table Name field.



3. In the Table Name field, select the name of the table that contains the base field. The New Valid Values page is updated with the Field Name field.



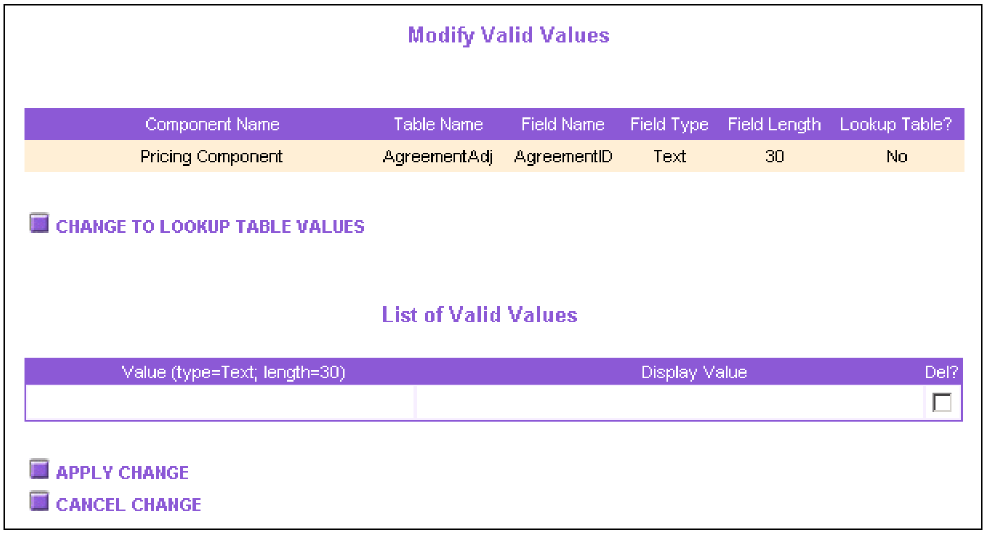
4. In the Field Name field, select the field you want to work with. The New Valid Value Set Page is updated with new buttons so that you can:
   - Create a new valid value set for the field.
   - Use the valid values that are already defined for another field.



Creating New Valid Values for a Base Field

If the valid values you want to define for the selected Base field are unique, you can create a completely new set of valid values for that field. Follow these steps:

1. In the New Valid Value Set page, click **CREATE NEW VALID VALUES**. The Modify Valid Values page displays.

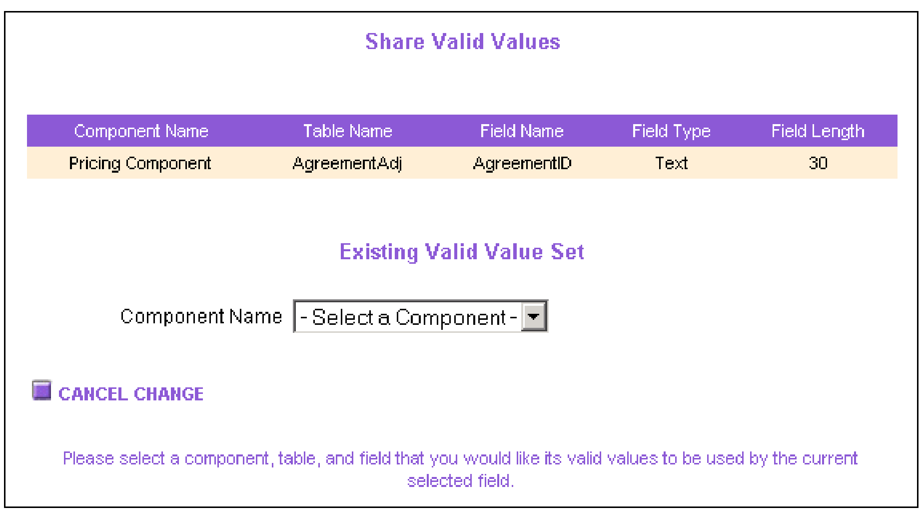


2. In the List of Valid Values grid, enter information in the following columns for each value you are defining:
   - Value - Enter the valid value.
   - Display Value - Enter the value you want to be displayed in selection lists for this valid value.
3. Click **APPLY CHANGE**.

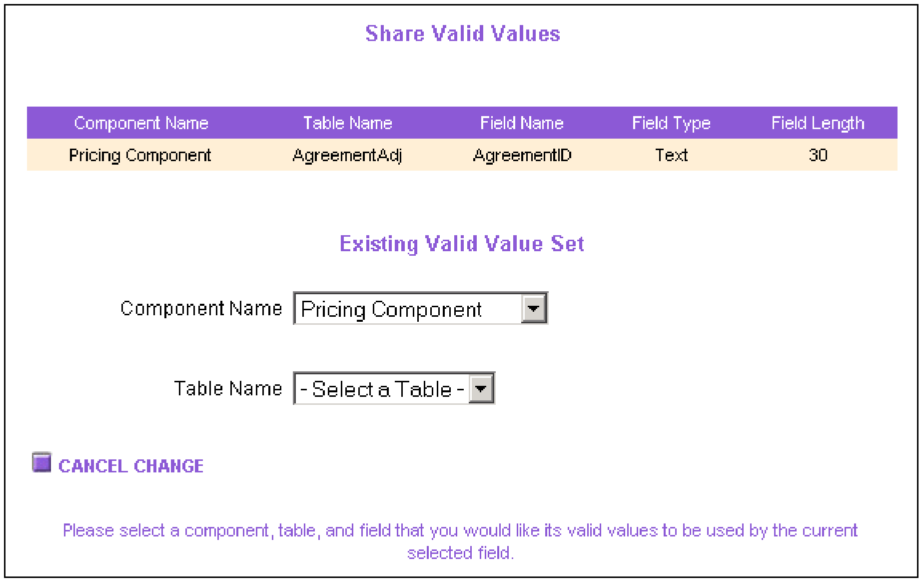
Using an Existing Set of Valid Values for a Base Field

You can redirect a base field to use the valid value set that is defined for another base field.

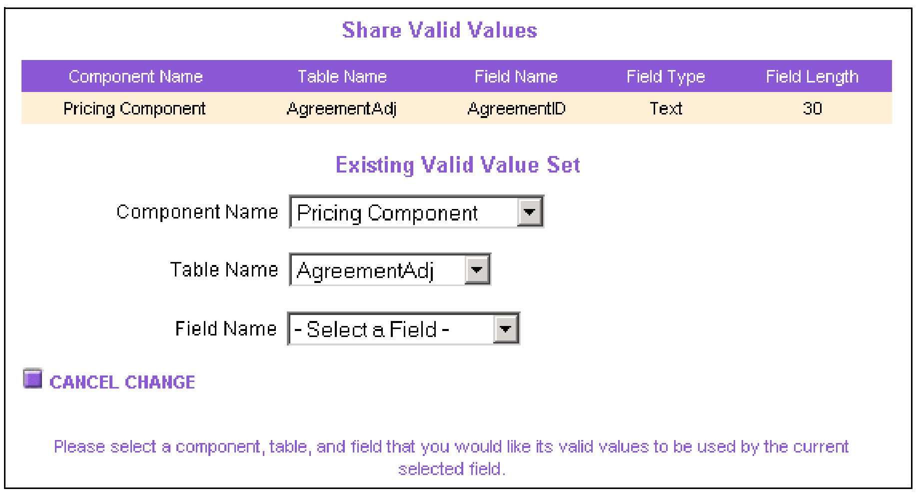
1. In the New Valid Value Set page, click **USE EXISTING VALID VALUES**. The Share Valid Values page displays.



2. In the Component Name field, select the component where the field that contains the valid values is located. The Share Valid Values page is updated with the Table Name field.



3. In the Table Name field, select the table where the field that contains the valid values is located. The Share Valid Values page is updated with the Field Name field.



4. In the Field Name field, select the field whose valid values you want to use. The Share Valid Values page is updated with the list of valid values for that field.

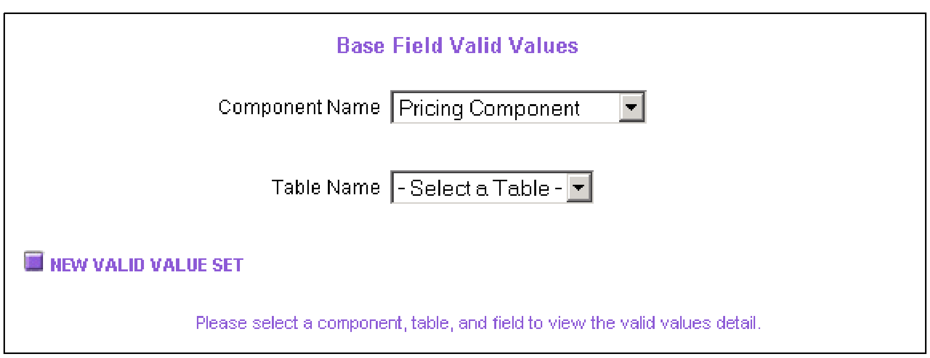
5. Verify that you want to use these values.
6. Click **APPLY CHANGE**. The valid values of this source field will be used by the destination (base) field.

Working with a Base Field Whose Valid Values Are Already Defined

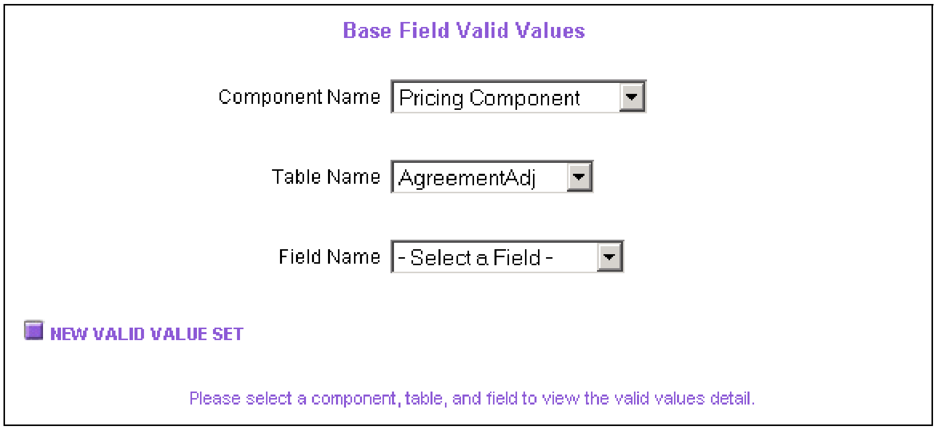
In the Base Field Valid Values page, you can work with only those fields for which valid values have already been defined. If you need to define valid values for a base field for which they are not defined, see "Creating New Valid Values for a Base Field" on page 12-4.

After adding valid values, the corresponding base field will then be available for selection in the Base Field Valid Values page.

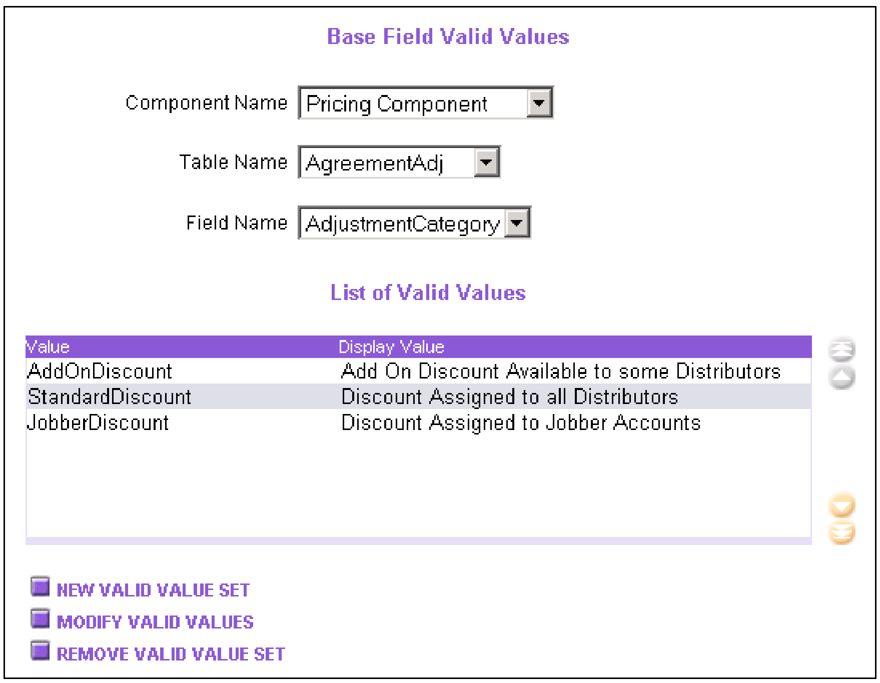
1. When you initially access the Base Field Valid Values page, only the Component Name field is available. Select the component you want to work with—currently, only the **Pricing Component** is available. The page is updated with the Table Name field.



2. In the Table Name field, select the table that contains the base field. The page is updated with the Field Name field.



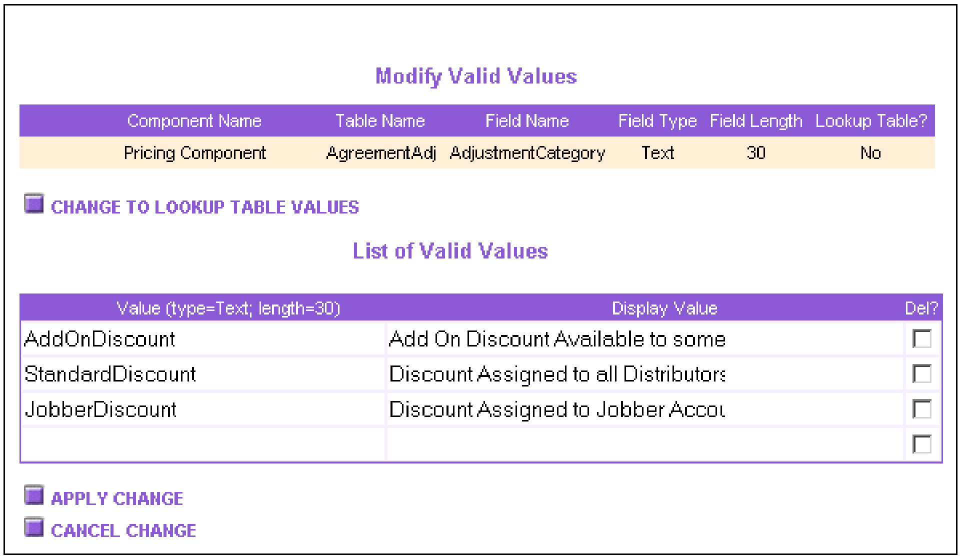
3. In the Field Name field, select the field you want to work with. The lower part of the page is updated with the list of valid values for that field.



Modifying a Base Field’s Valid Value Set

1. When you select a field in the Base Field Valid Values page, the list of valid values displays for that field.

2. Click **MODIFY VALID VALUES**. The Modify Valid Values page displays.



Modify Valid Values

Component Name	Table Name	Field Name	Field Type	Field Length	Lookup Table?
Pricing Component	AgreementAdj	AdjustmentCategory	Text	30	No

CHANGE TO LOOKUP TABLE VALUES

List of Valid Values

Value (type=Text; length=30)	Display Value	Del?
AddOnDiscount	Add On Discount Available to some	
StandardDiscount	Discount Assigned to all Distributors	
JobberDiscount	Discount Assigned to Jobber Accou	

APPLY CHANGE

CANCEL CHANGE

NOTE

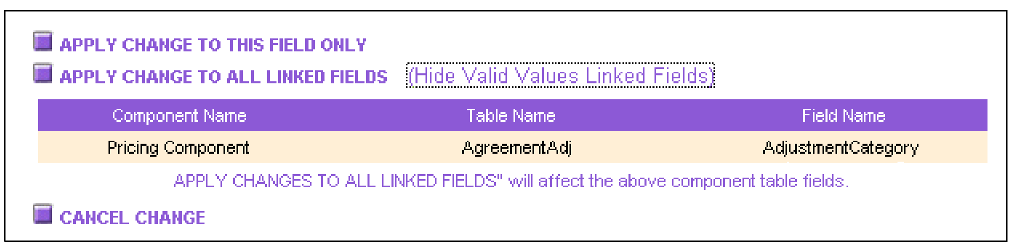
The above example shows the page that displays when you are working with a base field that is not linked to another field. The page that displays when you are working with a linked field is identical to the above example, except that different command buttons are available:

APPLY CHANGE TO THIS FIELD ONLY

APPLY CHANGE TO ALL LINKED FIELDS (Show Valid Values Linked Fields)

CANCEL CHANGE

3. If you are working with a linked field, you can click **(Show Valid Values Linked Fields)** to view the list of all linked fields that will also be affected.



APPLY CHANGE TO THIS FIELD ONLY

APPLY CHANGE TO ALL LINKED FIELDS (Hide Valid Values Linked Fields)

Component Name	Table Name	Field Name
Pricing Component	AgreementAdj	AdjustmentCategory

APPLY CHANGES TO ALL LINKED FIELDS" will affect the above component table fields.

CANCEL CHANGE

4. You can click **(Hide Valid Values Linked Fields)** to remove the linked fields list from the page.
5. In the List of Valid Values grid, you can add or change information in the following columns:
   - Value - Enter the valid value.
   - Display Value - Enter the value you want to be displayed in selection lists for the corresponding valid value.
6. If you want to delete a value, select its **Del?** check box.
7. To save the changes:
   - If you are not working with a linked field, click **APPLY CHANGE**.

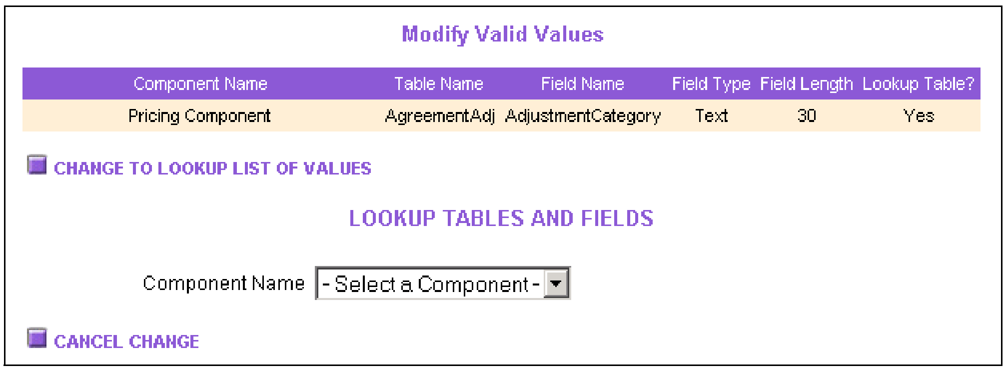
- If you are working with a linked field, click **APPLY CHANGE TO THIS FIELD ONLY** to update only the current field, or click **APPLY CHANGE TO ALL LINKED FIELDS** to also update all linked fields with your changes.

Using Table Lookup for a Base Field

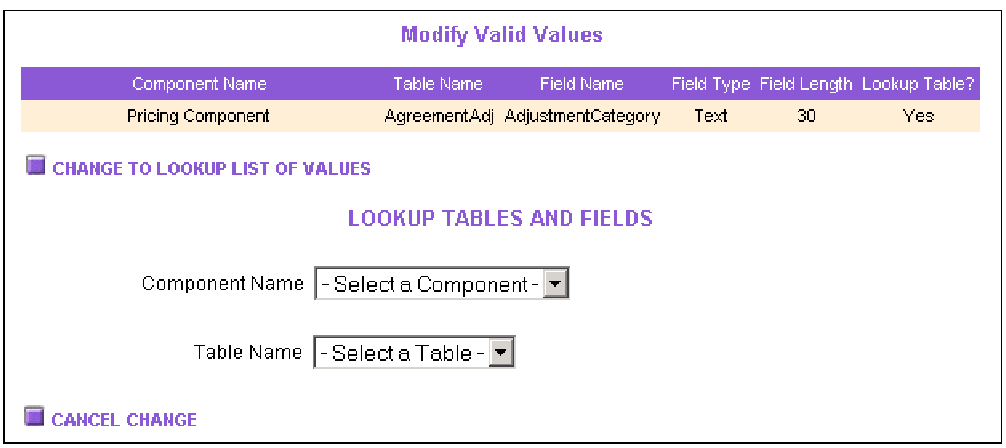
Similar to pointing a base field to another base field's valid values, you can also point a base field to another field whose values are not set up as valid values.

This feature saves on setup time by not having to enter the data twice. It also provides a method of dynamically updating a destination field's valid values when data is changed for the source field.

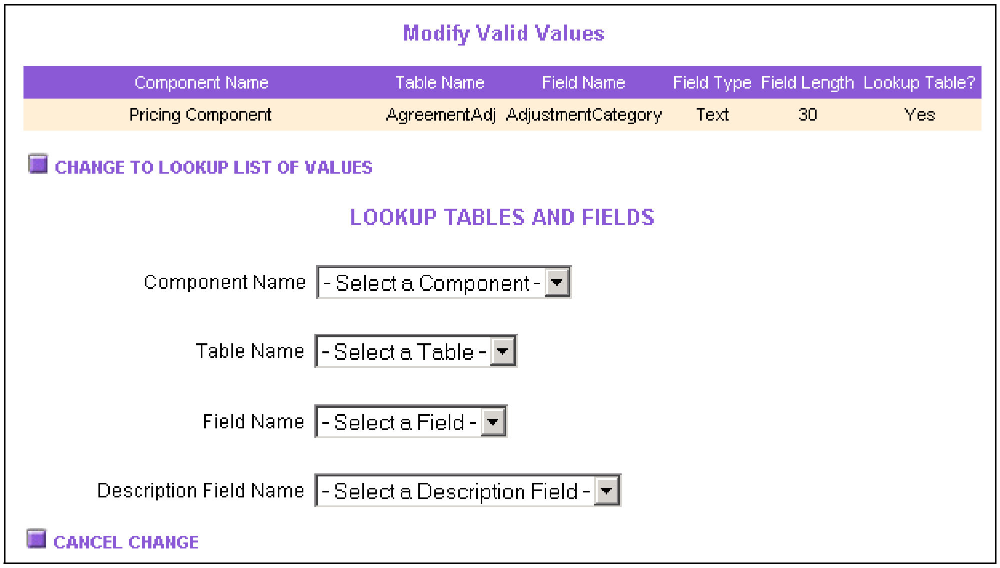
1. In the Modify Valid Values page, make sure that you are working with the correct base field. Then, click **CHANGE TO LOOKUP TABLE VALUES**. The Modify Valid Values page is updated with the Component Name field.



2. In the Component Name field, select the component where the source field is located. The Modify Valid Values page is updated with the Table Name field.



3. In the Table Name field, select the table that contains the source field. The Modify Valid Values page is updated with the Field Name and Description Field Name fields.



4. In the Field Name field, select the field whose data set you want to use for valid values.
5. If the source field has an associated field that contains its description, select that field in the Description Field Name field.
6. Click **APPLY CHANGE**.

Changing from Table Lookup to a Lookup List

If you want to define a list of valid values for a base field that currently looks them up in a table, follow these steps:

1. In the Modify Valid Values page, make sure that you are working with the correct field. Also, its Lookup Table? value must be set to **Yes**.
2. Click **CHANGE TO LOOKUP LIST OF VALUES**. The lower part of the page is updated with the List of Valid Values grid. See “Creating New Valid Values for a Base Field” on page 12-4 to add the field’s valid values; begin with step 2.

Removing a Base Field’s Valid Value Set

If a value is no longer valid for a base field, you can quickly remove it. Follow these steps:

1. Make sure that you are working with the correct field in the Base Field Valid Values page. Also, verify that the values in the List of Valid Values grid are the ones you want to remove.
2. Click **REMOVE VALID VALUE SET**.

UET Field Valid Values

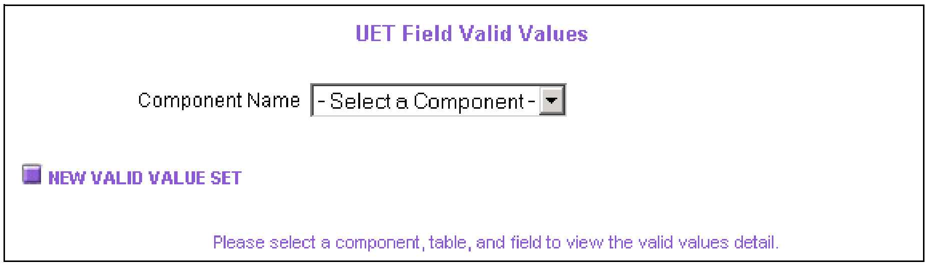
Using UETs (User Extended Tables), you can define your own fields for MAPICS Front Office solutions (see Chapter 11, “User Extended Tables," for more information).

After you have set up UETs, you can define their valid values to restrict entries in those fields to specific data. As with base fields, you can define a unique set of valid values for a UET field, or use Table Lookup or a Lookup Table to determine the field’s values.

Accessing UET Fields

1. On the System Administration Web, click the **Valid Values** tab.

2. On the sidebar, click **UET Fields**. The UET Field Valid Values page displays.

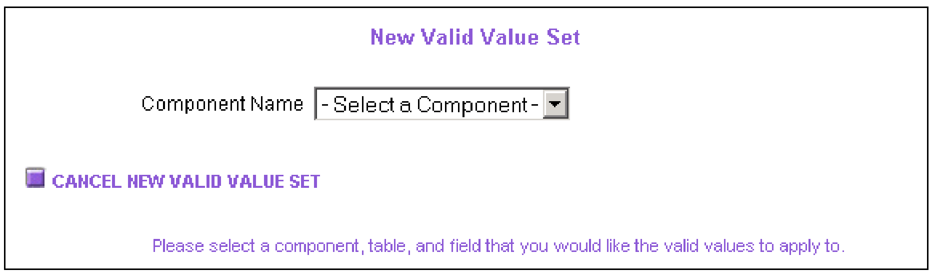


Adding a Valid Value Set to a UET Field

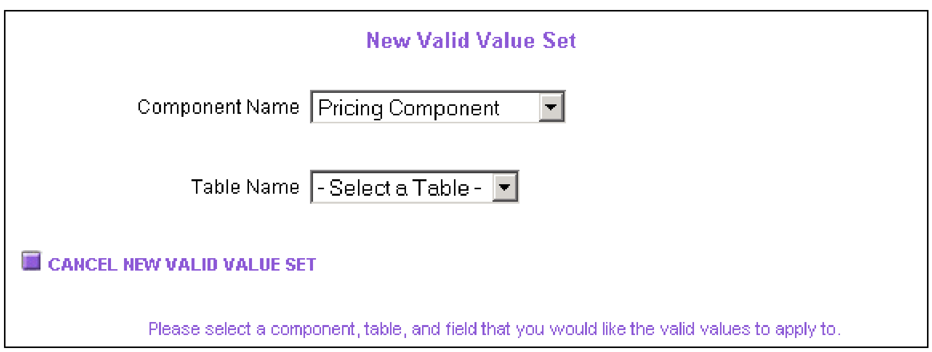
After you have added a UET field, you can define its valid values.

NOTE: Note that you cannot use this procedure to define values for a field you have already set up values for. Instead, see "Modifying a UET Field's Valid Value Set" on page 12-17.

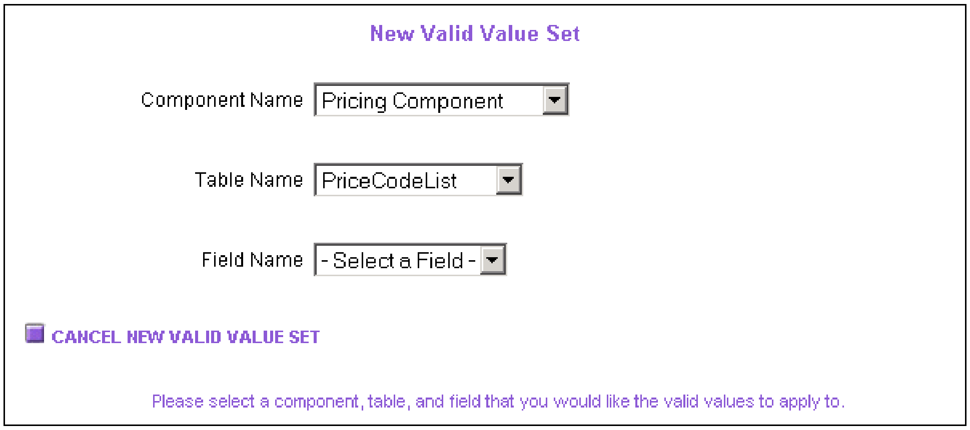
1. In the UET Field Valid Values page, click **NEW VALID VALUE SET**. The New Valid Value Set page displays.



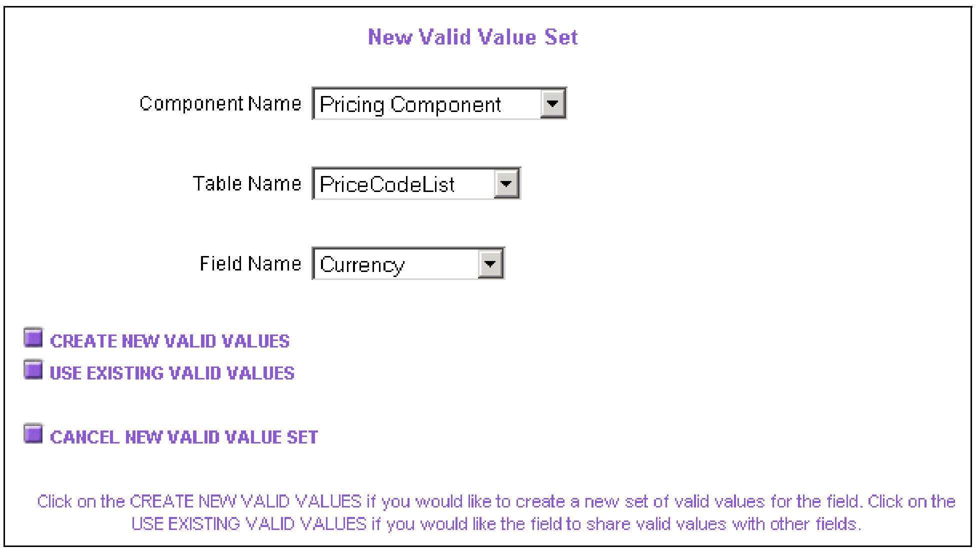
2. In the Component Name field, select the component where the UET field is located. The page is updated with the Table Name field.



3. In the Table Name field, select the table that contains the UET field you want to add valid values to. The page is updated with the Field Name field.



4. In the Field Name field, select the field you want to add valid values to.

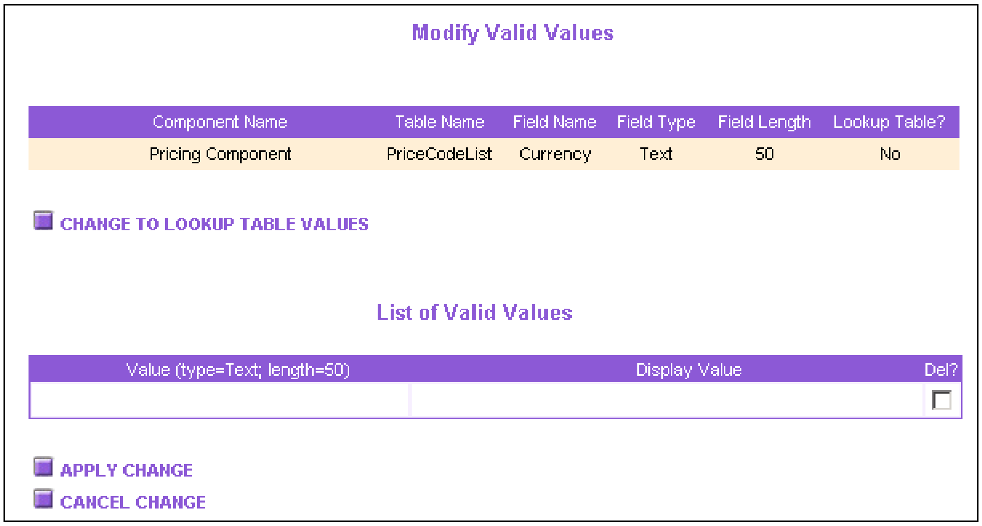


5. To add a new valid value set to a UET field, you can:
   - Create a new valid value set for it.
   - Use the valid values that are already defined for another field.

Creating New Valid Values for UET Fields

You can create a completely new set of valid values for a UET field that has no valid values.

1. In the New Valid Value Set page, click **CREATE NEW VALID VALUES**. The Modify Valid Values page displays.

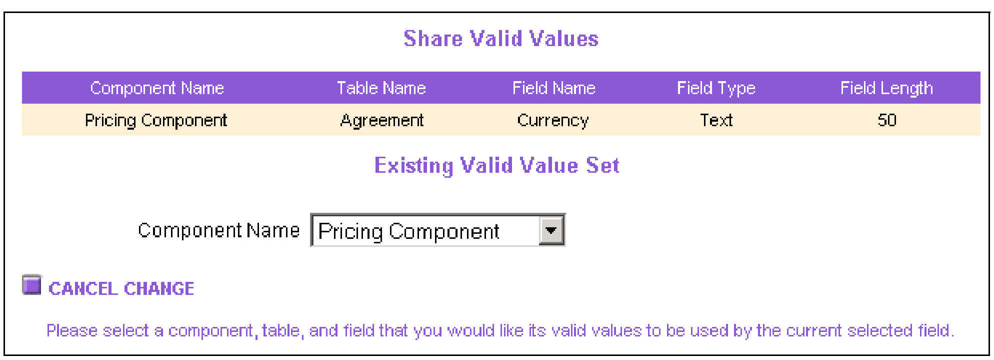


2. In the List of Valid Values grid, enter information in the following columns for each value you are defining:
   - Value - Enter the valid value.
   - Display Value - Enter the value you want to be displayed in selection lists for the corresponding valid value.
3. Click **APPLY CHANGE** to save the values.

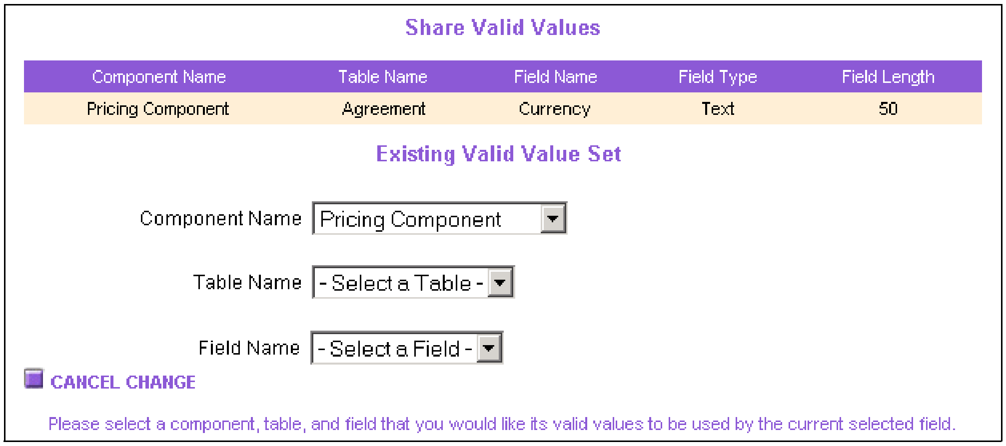
Using Existing Valid Values for UET Fields

You can redirect a UET field to use the set of valid values that are defined for another field.

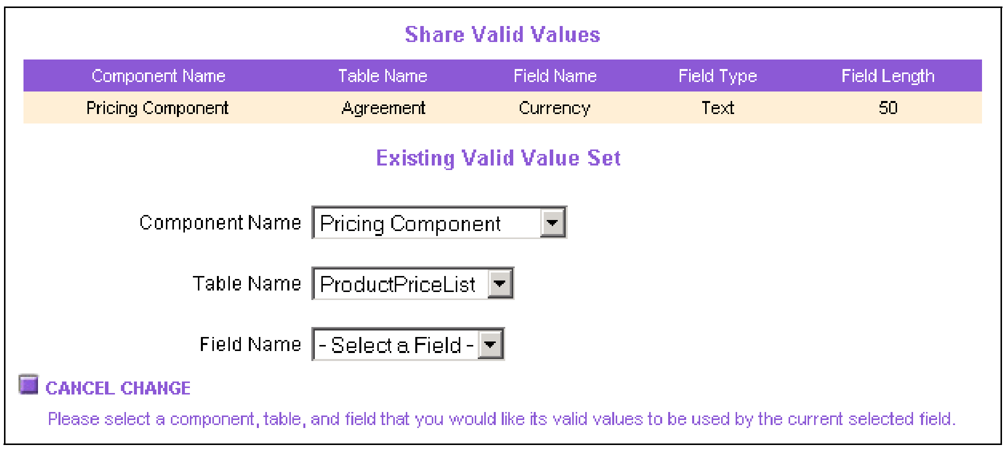
1. In the New Valid Value Set page, click **USE EXISTING VALID VALUES**. The Share Valid Values page displays.



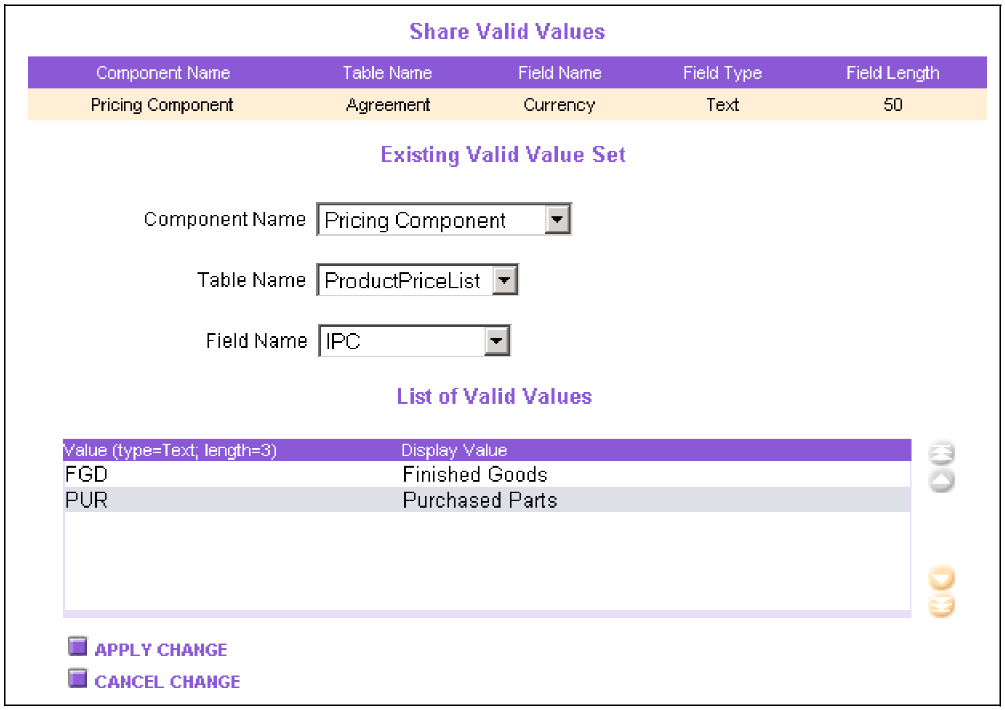
2. In the Component Name field, select the component where the field is located. The page is updated with the Table Name field.



3. In the Table Name field, select the table that contains the field whose valid values you want to use. The page is updated with the Field Name field.



4. In the Field Name field, select the source field. The page is updated with the List of Valid Values grid, which contains a list of all the valid values that have been defined for the selected field.



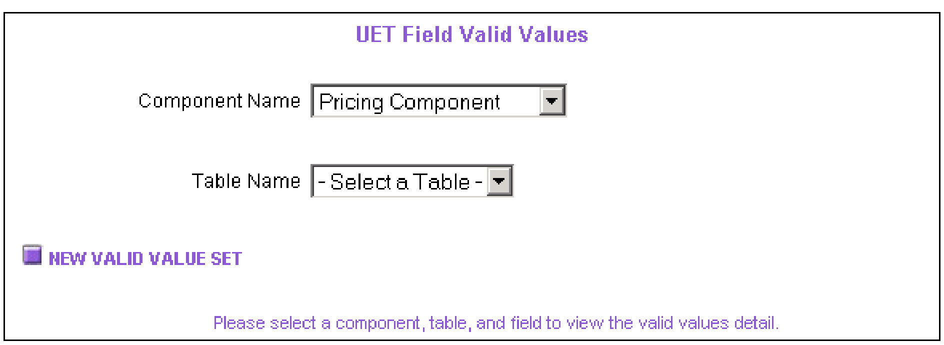
5. Verify that these values are the ones you want to use. Then, click **APPLY CHANGE**.

Working With UET Field Valid Values

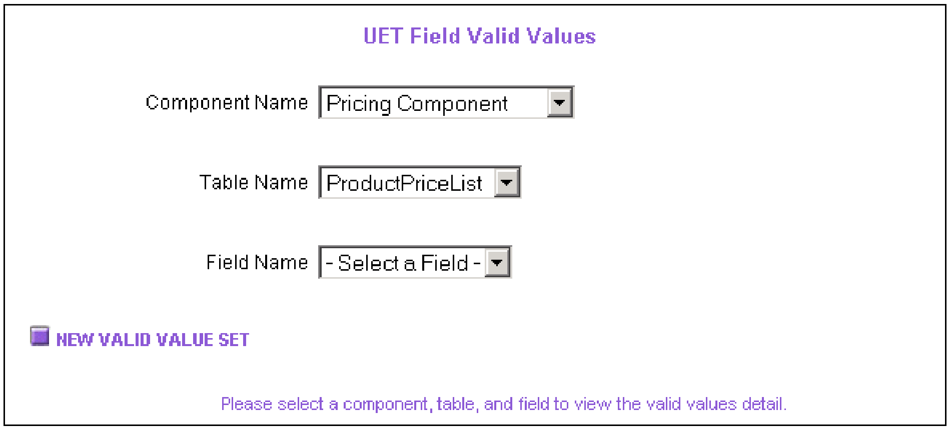
In the UET Field Valid Values page, you can work with only those fields for which valid values have been defined. If you need to define valid values for a base field that does not have values defined, see “Creating New Valid Values for UET Fields” on page 12-14.

After adding valid values, the corresponding UET field will then be available for selection in the UET Field Valid Values page.

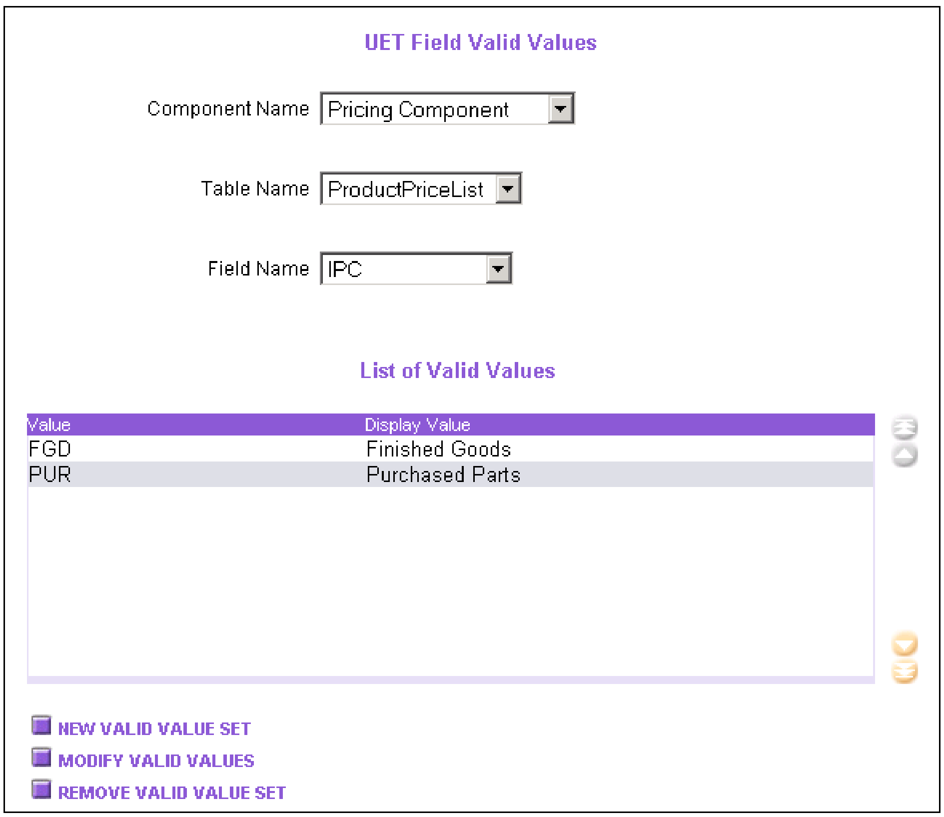
1. When you initially access the UET Field Valid Values page, only the Component Name field is available. Select **Pricing Component** component, the only available option. The page is updated with the Table Name field.



2. In the Table Name field, select the table that contains the UET field you want to work with. The UET Field Valid Values page is updated with the Field Name field.



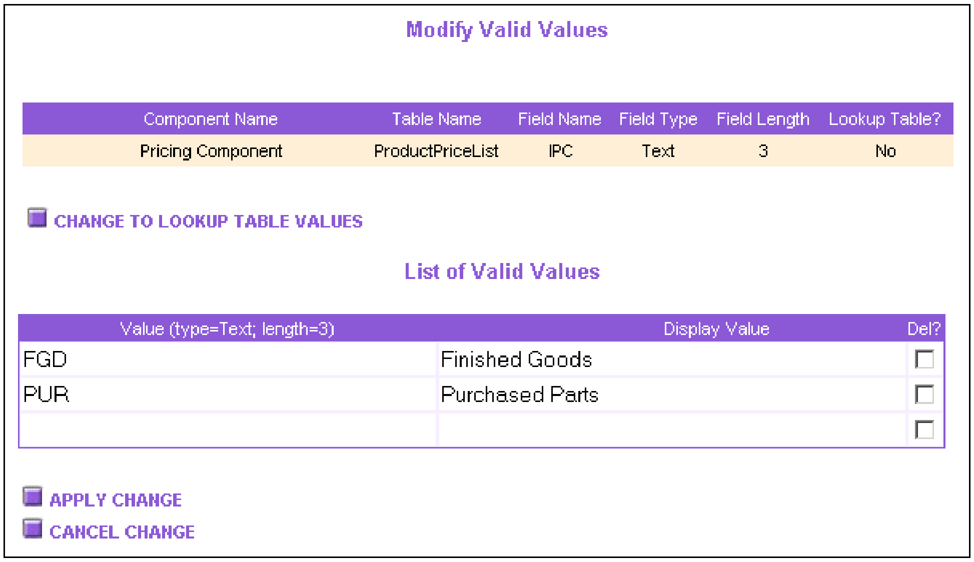
3. In the Field Name field, select the UET field you want to work with. The page is updated with the List of Valid Values grid, which contains a list of all the valid values that have been defined for the field.



Modifying a UET Field's Valid Value Set

1. In the UET Field Valid Values page, make sure that you are working with the correct field.

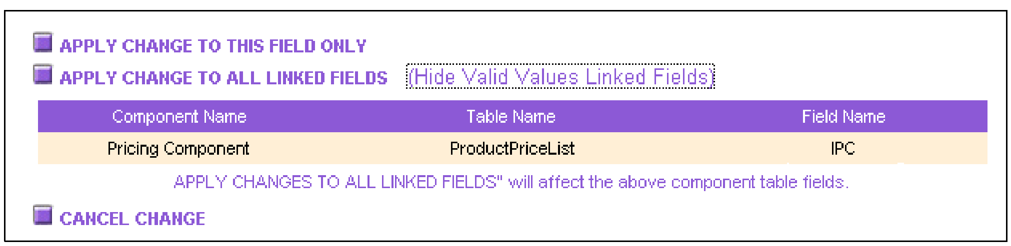
2. Click **MODIFY VALID VALUES**. The Modify Valid Values page displays.



The above example shows the page that displays when you are working with a UET field that is not linked to another field. The page that displays when you are working with a linked field is identical to the above example, except that the command buttons at the bottom are different:

APPLY CHANGE TO THIS FIELD ONLY
APPLY CHANGE TO ALL LINKED FIELDS (Show Valid Values Linked Fields)
CANCEL CHANGE

3. If you are working with a linked field, you can click **(Show Valid Values Linked Fields)** to view the list of all linked fields that will also be affected.



To hide the linked fields list, click **(Hide Valid Values Linked Fields)**.

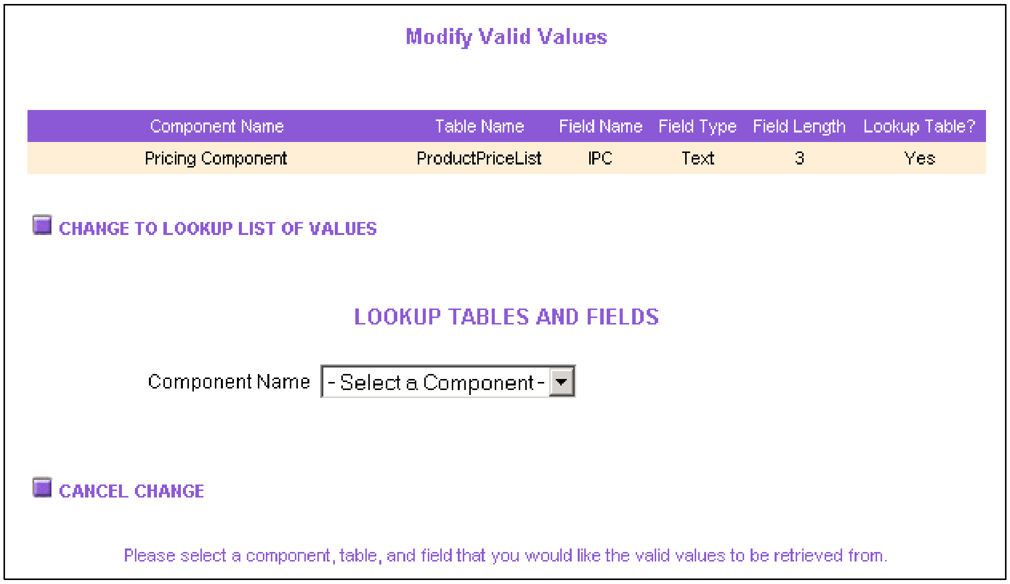
4. In the List of Valid Values grid, you can add or change the following columns:
   - Value - Enter the valid value.
   - Display Value - Enter the value you want to be displayed in selection lists for the corresponding valid value.
5. If you want to delete a value, select its **Del?** check box.
6. To save the changes:
   - If you are working with a linked field, click **APPLY CHANGE TO THIS FIELD ONLY** to update only the current field's values, or click **APPLY CHANGE TO ALL LINKED FIELDS** to update all fields that are linked to this one.
   - If you are not working with a linked field, click **APPLY CHANGE**.

Using Table Lookup for UET Fields

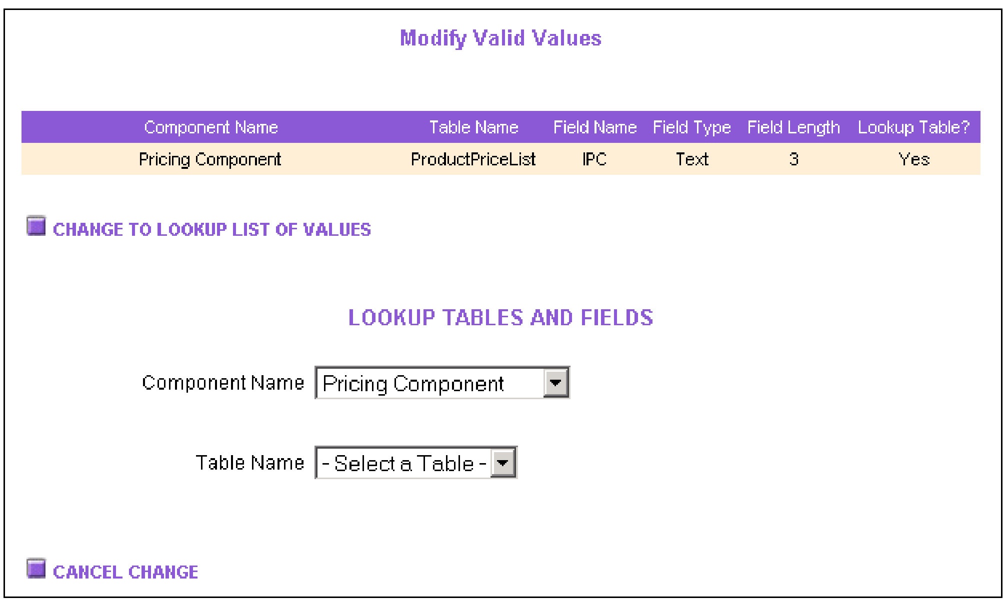
Similar to pointing a UET field to another UET field's valid values, you can also point a UET field to another field whose values are not set up as valid values.

This feature saves on setup time by not having to enter the data twice. It also provides a method of dynamically updating a destination field's valid values when data is changed for the source field.

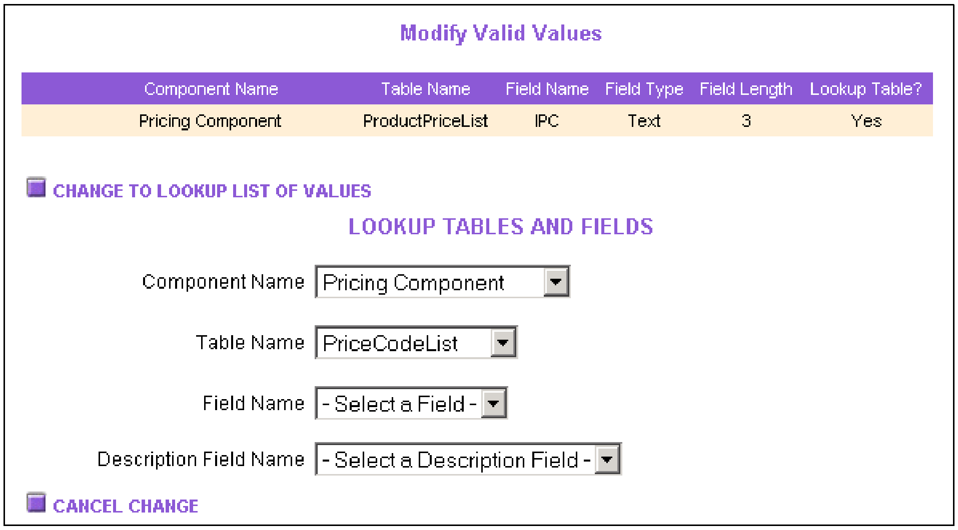
1. In the Modify Valid Values page, make sure that you are working with the correct base field. Then, click **CHANGE TO LOOKUP TABLE VALUES**. The Modify Valid Values page is updated with the Component Name field.



2. In the Component Name field, select the component where the source field is located. The Modify Valid Values page is updated with the Table Name field.



3. In the Table Name field, select the table that contains the source field. The Modify Valid Values page is updated with the Field Name and Description Field Name fields.



4. In the Field Name field, select the field whose data set you want to use for valid values.
5. If the source field has an associated field that contains its description, select that field in the Description Field Name field.
6. Click **APPLY CHANGE**.

Removing a Valid Value Set of a UET Field

If necessary, you can remove an existing valid value set for a UET field.

1. Make sure that you are working with the correct field in the UET Field Valid Values page. Also, verify that the values displayed in the List of Valid Values grid are the ones you want to remove.
2. Click **REMOVE VALID VALUE SET**.

13

TAXWARE

If TAXWARE is installed, it is used to calculates taxes on orders placed in CRM, using a variety of complex algorithms. Taxes are calculated and displayed, along with the order totals, when a customer commits an order—unless the customer provides a valid tax exemption certificate.

TAXWARE uses many factors to determine taxation, including the company profile, the tax exemption status of the user's customer, the product's harmonization code, the states and countries involved in the transaction, and the branch location.

TAXWARE levies the following types of taxes, depending on the country in which the sale takes place:

- U.S. sales tax – United States of America
- Value-added tax (VAT) – Europe
- Goods and services tax (GST) – China, Singapore, Canada, New Zealand, Australia and others
- Provincial sales tax (PST) – Canada only
- Harmonized sales tax (HST) – Canada only
- Use tax – United States of America

In the U.S., most retail sales require sales tax, which is a commodity-based tax. The jurisdiction levying the tax controls the amount of tax and the circumstances under which it is charged. Over 3,000 jurisdictions in the U.S. levy sales tax. The seller of the goods or services charges, collects and remits the sales tax.

Sales tax is not levied on wholesale transactions.

Use tax is levied on goods and services, usually under the same guidelines established for sales tax. The difference is the purchaser is responsible for remitting use tax. TAXWARE charges tax on labor, as long as it is established and assigned a valid harmonization code.

Because taxes in the U.S. exist from the state-level down (county, city and so on), 30,000 different tax combinations are possible. TAXWARE handles all these permutations.

Outside of the U.S., taxes (such as **VAT**) are levied after every transaction. TAXWARE uses WorldTax to compute these taxes.

Implementing TAXWARE

On CRM

After you have installed TAXWARE, follow these steps to implement it on CRM:

1. Using the TAXWARE Toolkit, set up your company profile in the **Nexpro** window.
2. Using the TAXWARE Toolkit, set up the State Nexus profiles in the **Nexus** window. For each state and the District of Columbia, select the rule that applies (no tax, tax all excluding certain counties, and so on).

3. In the Account List view in the CRM, ensure that your customer account records are set up. In addition, for customers that are tax exempt, make sure that you have set up their Tax Exemption Certificates in the Application Administration Web. A certificate record identifies the certificate number, the exemption type, the jurisdiction that issued the certificate, the exemption percentage(s), and the date range during which the certificate is in effect.
4. In the Country List Maintenance and the State List Maintenance views in CRM, ensure that the location (country and state/province) for each customer is set up. The location is critical in Europe, because it is used in Intrastat reporting. In the U.S., the location is also important, because “physical presence” of the seller governs whether sales or use tax is levied on a specific transaction.
5. In the System Administration Web, you need turn on the flag for using TAXWARE. Click the Settings tab, and then click **Environment** on the sidebar. Expand the Functionality group, select the Use Taxware to Calculate Taxes? check box, and click **SAVE SETTINGS**.

See www.TAXWARE.com or the TAXWARE documentation set for detailed information about using TAXWARE.

TAXWARE Codes

Each external system with which CRM integrates will typically have its own set of codes for tracking the records that it creates and maintains. If you use different codes (country, state/province, and so on) in MAPICS than in TAXWARE, you will need to set up cross-references between those codes so that MAPICS can synchronize the external codes to your internal ones. See the chapter on the Electronic Commerce Definition utility in the *MAPICS Active Link Utilities Guide* for instructions on setting up cross-references.

Maintaining TAXWARE

If you have TAXWARE installed, CRM integrates with TAXWARE to calculate taxes on customer orders. TAXWARE handles US sales tax, use tax, and foreign taxes.

When a customer commits an order in CRM, the order line information is passed to TAXWARE, which performs the tax calculations and then passes the total tax amount back to the order.

You must perform several maintenance tasks, using the TAXWARE Sales/Use Tax System Toolkit:

1. On a monthly basis, pull down new tax tables from the TAXWARE Web site at www.TAXWARE.com.
2. Implement various reporting functions.
3. View error logs. TAXWARE tracks errors with the application name, level, and return code. CRM translates these errors, and provides the severity level and a meaningful description for each error in the log file.
4. Perform transaction logging.
5. Set the Audit flag to track tax calculations by order.

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Settings

Settings determine which business rules and values are used by MAPICS CRM/Customer Center. You can define them by environment and role. Environment settings represent a system workspace and apply to a particular environment. Role settings represent a user workspace and apply to a particular type of user. You can also define numbering sequence settings for each type of transaction you support in CRM/Customer Center.

Environments

During installation, you defined the environments you needed to use for different aspects of your business. Using the System Administration Web, you can define the settings that will determine how your current environment will work.

You can define environment settings for the following groups:

- Functionality
- IOE
- IOE New Users
- Logic
- Pricing
- Product
- Security
- System

In addition, you can view the settings for the Database group.

This table lists the default values for the settings in the above groups:

Group	Setting	Default Value
Database	Frontstep Communication LDB	FS_Communication_*sitename*
	Frontstep CRM LDB	FS_CRM_*sitename*
	Frontstep Currency LDB	FS_System_*sitename*
	Frontstep Definition LDB	FS_System_*sitename*
	Frontstep Internet LDB	FS_Transaction_*sitename*
	Frontstep Order Status LDB	FS_CRM_*sitename*
	Frontstep Pricing LDB	FS_Transaction_*sitename*
	Frontstep Product LDB	FS_Transaction_*sitename*
	Frontstep System LDB	FS_System_*sitename*

Group	Setting	Default Value
Functionality	Number of Items to display in Product Catalog Grid	22
	Commit Order if Errors in Inventory Commit	Yes
	Use Taxware to Calculate Taxes?	No
	Maximum Result Record Count	100
	Web Language Code	en
	Display quantity break link on additional description page	No
	Allow Edit of Bill To / Ship To Record?	No
	Automatically Check Product Availability In Product Catalog Results?	No
	Automatically Price Product Catalog Results?	No
	Maximum Product Search Results Returned	100
IOE	Default Password	password
	Allow Guest User profile creation	Yes
	Allow Users With No Xref Customers to Create Orders and Customers	No
IOENewUser	New User Default Site	MAIN
	New User Default Pay Rule	Charge
	New User Default Ship Rule	Standard
	New User Default Role	User
	New User Default Ship to Confirm Rule	XMLCustomer
Logic	Use BillTo as key field for storing Customer Part Numbers	Unchecked
	Currency Rate Type	Spot rate
	Currency Code	US Dollars
	Quote Expiration Days	30
Pricing	Default Keyword for Agreements	Product
	Default Agreement Eligibility Keyword for Pricing	Agreement Eligibility
	Default Price Code for Pricing	List Price
	Default Price List for Pricing	US Price List
	Default Currency Value for Pricing	US Dollar
Security	Windows Group That Has Access to System Administration Web	Domain Users
	Windows Group That Has Access to Application Administration Web	Domain Users
System	System Error Mail Recipients	WebMaster@Company.com
	SMTP Mail “from” E-mail Address	WebMaster@Company.com
	SMTP Mail Host Name	MailHost.Company.com

Accessing Environment Settings

1. On the System Administration Web, click the **Settings** tab.
2. On the sidebar, click **Environment**. The Environment Settings page displays.

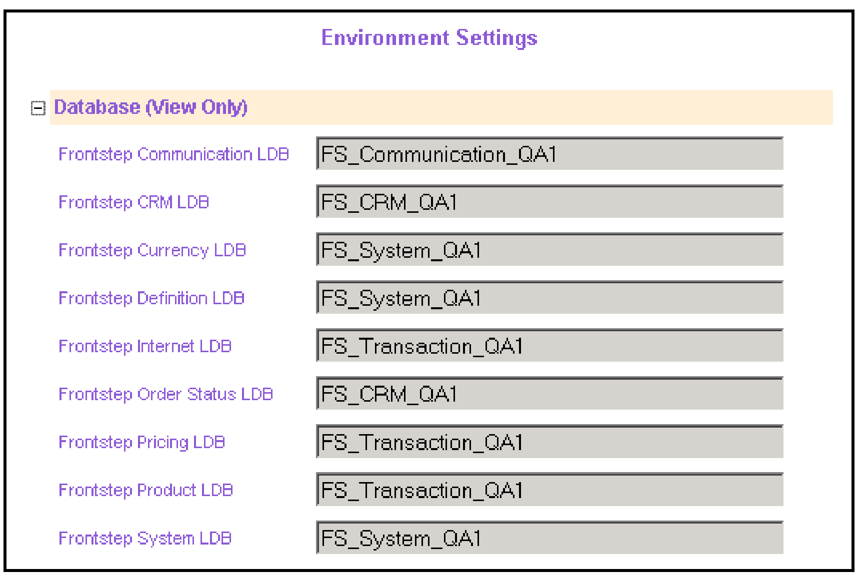
Viewing an Environment's Database Settings

During the installation process, you defined logical database names for the databases in your environment. These logical database names (LDB) point to physical databases.

Using the System Administration Web, you can view the logical database names for your CRM databases:

- Communication - Contains data mapping and formatting data that are used by CRM for messaging and other communications.
- CRM - Contains data for defining user roles that are used by CRM Order Management (Commerce) pages.
- Currency - Contains currency codes, currency conversion rates, and other currency data.
- Definition - Contains event message data, and View Builder data for defining views.
- Internet - Contains shipping and billing customer information and rules.
- Order Status - Contains all order information, including both header- and line-level data.
- Pricing - Contains the information necessary for performing price lookups, such as price codes and price lists.
- Product - Contains product information, such as product configuration and user attribute data.
- System - Contains a variety of system information, such as valid value definitions and pricing keyword data.

To view the settings for the Database group, in the Environment Settings page, click the plus (**+**) sign next to the Database group to expand it.



Defining Functionality Settings for an Environment

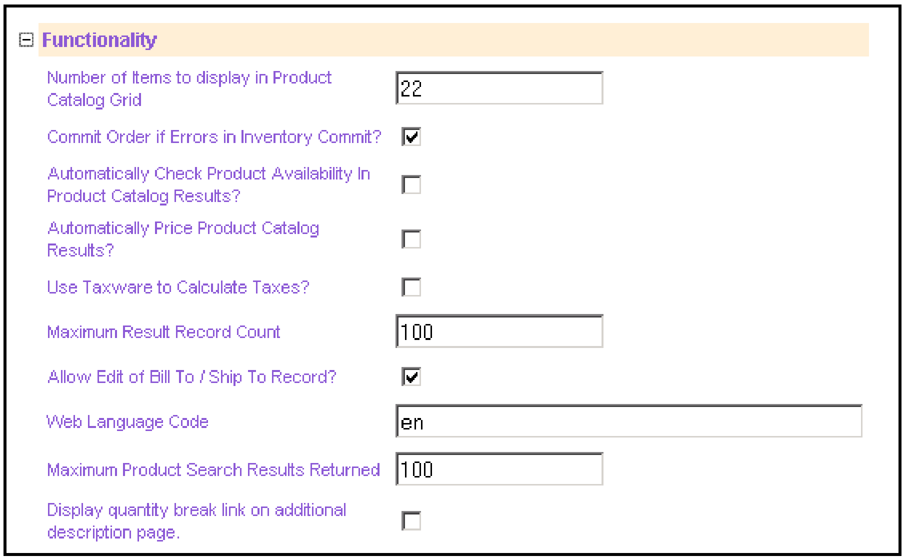
Functionality settings determine the features of a given environment, including:

- The maximum number of items to display in product catalog grids in CRM/Customer Center
- Whether to commit commit an order if errors in Inventory commit
- Whether Global Taxation (TAXWARE) is used for calculating taxes

- The maximum number of records to be returned by product or account searches in the Application Administration Web
- The default language code for CRM/Customer Center
- Whether to display a quantity break link in the Product Additional Details view on CRM/ Customer Center
- Whether information will be editable in bill-to and ship-to records on the Application Administration Web
- Whether availability and pricing information will immediately display during product catalog searches in CRM/Customer Center
- The maximum number of records to be returned by product catalog searches in CRM/ Customer Center

Follow these steps to define settings for the Functionality group:

1. On the Environment Settings page, click **+** next to the Functionality group to expand it.



2. Define the following settings:
   - Number of Items to display in Product Catalog Grid - Specify the maximum number of lines you want to be displayed in product catalog grids in CRM/ Customer Center. Once this number is exceeded, controls will be added to the view for paging through the list of products.
   - Commit Order if Errors in Inventory Commit - Select this check box if you want CRM to commit the order if inventory errors are committed.
   - Automatically Check Product Availability In Product Catalog Results - Select this check box if you want CRM/Customer Center to automatically check product availability when displaying the Product Catalog.
   - Automatically Price Product Catalog Results - Select this check box if you want CRM to automatically price items when displaying the Product Catalog.
   - Use Taxware to Calculate Taxes? - Select this check box to use Global Taxation (TAXWARE) to calculate taxes.
   - Maximum Result Record Count - Enter the maximum number of records to be returned by product and account searches in the Application Administration Web.

- Web Language Code - Enter the default language code for CRM/Customer Center. This code is used if a guest is browsing or a customer does not have a default language.
- Maximum Product Search Results Returned - Enter the maximum number of records to be returned by product catalog searches in CRM/Customer Center.
- Allow Edit of Bill To / Ship To Records - Select this check box if you want information in bill-to and ship-to records to be editable on the Application Administration Web.

  Note: Selecting this check box activates the E-mail Address, Branch, Confirmation Rule and Shipping Rule fields in the ship to record (Ship To Maintenance), and the How Pay Rule field in the bill to record (Account Maintenance).

  Important: Do not select this check box if you are integrating CRM/Customer Center with your enterprise system.
- Display quantity break link on additional description page - Select this check box if you want to display quantity break pricing in the Product Additional Details view on the Customer Center Web site.

  Important: Do not select this check box if you are integrating CRM/Customer Center with your enterprise system.

3. Click **SAVE SETTINGS**.

Defining IOE Settings for an Environment

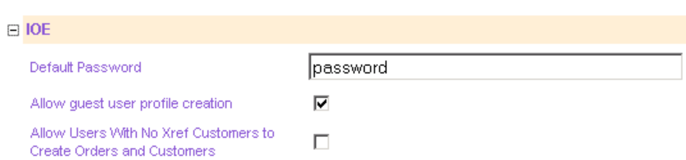
NOTE

These settings only appear when Customer Center is installed.

The Internet Order Entry (IOE) environment settings allow you to identify a default value for the login password, indicate whether guest users can be created, and determine whether users who have no cross-referenced customers can create orders and customers.

Follow these steps to define the IOE settings:

1. On the Environment Settings page, click **+** next to the IOE option to expand it.



2. Define the following settings:
   - Default Password - Enter the default password name to log in to the system.
   - Allow Guest User Profile Creation - Select this check box to indicate whether guest users can be created for your system.
   - Allow Users With No Xref Customers to Create Orders and Customers - Select this check box to indicate whether users who are not cross referenced with customers can create orders and customers.
3. Click **SAVE SETTINGS**.

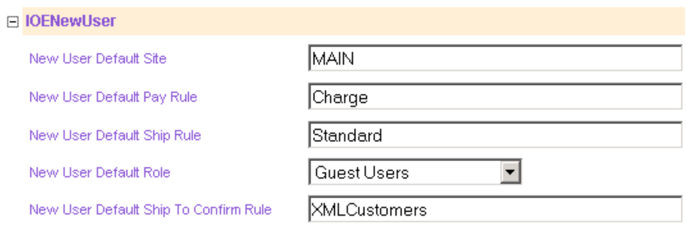
Defining IOENewUser Settings for an Environment

NOTE These settings only appear when Customer Center is installed.

The IOENewUser environment settings identify the default user settings for site, role, order payment, shipping, and shipping confirmation rules for internet order entry.These default settings are used when new users access the system. Administrators can change the settings.

Follow these steps to define default settings for new users:

1. On the Environment Settings page, click **+** next to the IOENewUser option to expand it.



2. Define the following settings:
   - New User Default Site - Enter the default site name the user will access.
   - New User Default Pay Rule - Select the default payment rule the user will use for paying for orders.
   - New User Default Ship Rule - Select the ship rule.
   - New User Default Role - Select the default role for the user.
   - New User Default Ship to Confirm Rule - Select the rule used for confirming shipments.
3. Click **SAVE SETTINGS**.

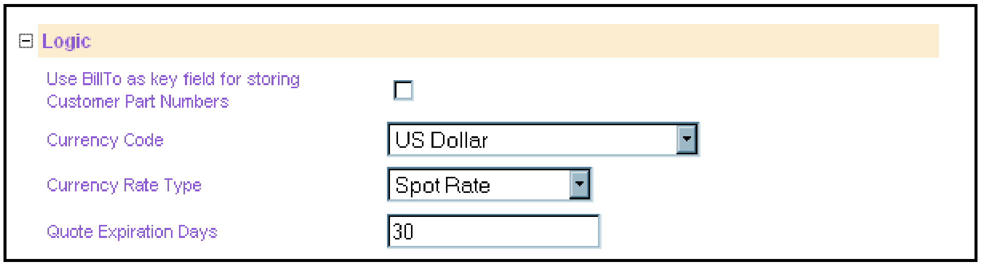
Defining Logic Settings for an Environment

The Logic group settings control basic currency and quote parameters, including:

- The number of days after which a quote will automatically expire, and it can no longer be converted to a sales order
- The base currency to be used as the default currency for CRM and for the minimum order display in CRM
- The currency exchange rate type for CRM, for converting between order currencies and the base currency
- Using BillTo as a key field for storing customer part numbers.

Follow these steps to define settings for the Logic group:

1. On the Environment Settings page, click **+** next to the Logic group to expand it.



2. Define the following settings:

    - Use BillTo as key field for storing Customer Part Numbers - Select the check box if customer part numbers will be stored by BillTo (Account). Leave the check box blank the customer part numbers will be stored by ShipTo.

    SyteLine 6 and iSeries use BillTo as the key field. SyteLine 7 uses ShipTo as the key field.

    - Currency Code - Select the base currency to be used as the default currency in CRM, if a currency has not been set up for an account. This currency will also be used in CRM for displaying minimum order amounts.
    - Currency Rate Type - Select the currency exchange rate type to be used for conversions from the base currency.
    - Quote Expiration Days - Enter the number of days after which a quote will automatically expire, and it can no longer be converted it to a sales order

3. Click **SAVE SETTINGS**.

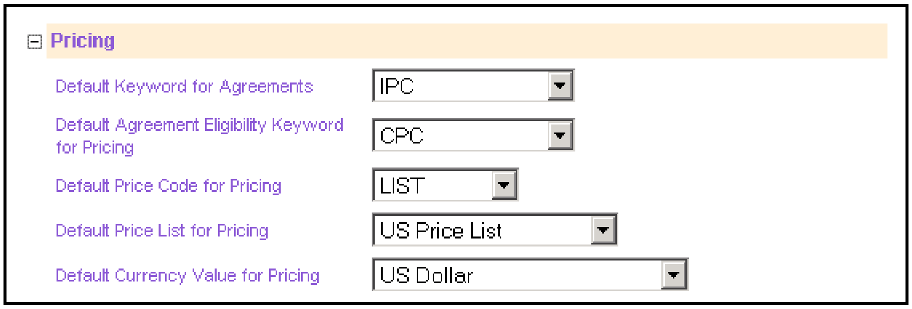
Defining Pricing Settings

The Pricing group settings control default values for Pricing, including:

- The default agreement keyword to be used when no agreement keyword is assigned in the eligibility keyword record
- The default eligibility agreement keyword to be used when no eligibility agreement keyword is assigned in the ship to customer account record
- The default price code to be used when no price code is assigned in either the ship to customer account record or the product record
- The default price list to be used when no price list is assigned in either the ship to customer account record or the product record
- The default pricing currency to be used when no pricing currency is assigned in the bill to customer account record

Follow these steps to define settings for the Pricing group:

1. On the Environment Settings page, click **+** next to the Pricing group to expand it.



2. Define the following settings:
   - Default Keyword for Agreements - Select the default keyword for agreements. This field is supported only if the Advanced Pricer is installed.
   - Default Agreement Eligibility Keyword for Pricing - Select the default agreement eligibility keyword for pricing. This field is supported only if the Advanced Pricer is installed.
   - Default Price Code for Pricing - Select the default price code for pricing.
   - Default Price List for Pricing - Select the default price list for pricing.
   - Default Currency Value for Pricing - Select the default currency for pricing.
3. Click **SAVE SETTINGS**.

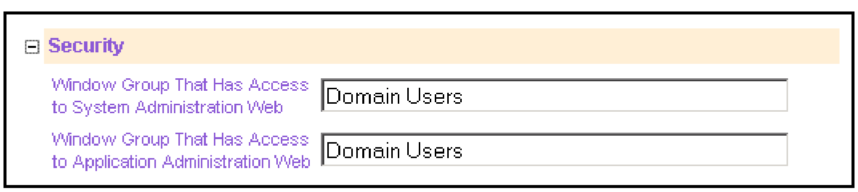
Defining Security Settings for an Environment

The Security group settings control whether or not users can access the System Administration Web and the Application Administration Web. You must belong to the applicable Window group such as Domain Users to access the corresponding Web.

NOTE: Window groups are Windows group accounts, which you set up as part of Windows security. See your System Administrator or the Windows documentation for information about setting up Windows accounts.

Follow these steps to define settings for the Security group:

1. On the Environment Settings page, click **+** next to the Security group to expand it.



2. Define the following settings:
   - Window Group That Has Access to System Administration Web - Enter the name of the Window Group whose users will have access to the System Administration Web.
   - Window Group That Has Access to Application Administration Web - Enter the name of the Window Group whose users will have access to the Application Administration Web.
3. Click **SAVE SETTINGS**.

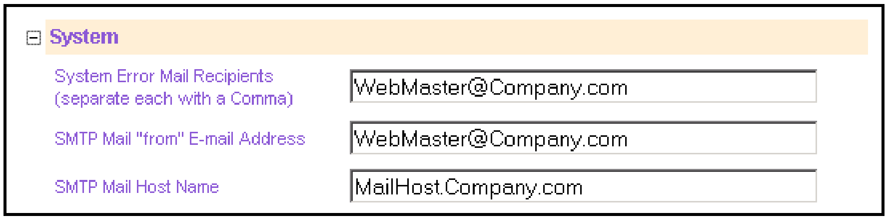
Defining System Settings

The System group settings control mail message specifications, including:

- The name of the SMTP mail host that is used for mail message processing
- Recipients of error mail messages for system errors
- The sender of system mail messages

Follow these steps to define settings for the System group:

1. On the Environment Settings page, click **+** next to the System group to expand it.



2. Define the following settings:
   - System Error Mail Recipients (separated each with a Comma) - Enter the e-mail addresses of the recipients of system error mail messages (separate each one with a comma). This setting applies only to system errors, not to application issues.
   - SMTP Mail “from” E-mail Address - Enter the e-mail address of the sender of system messages.
   - SMTP Mail Host Name - Enter the name of the host machine for mail services.
3. Click **SAVE SETTINGS**.

Roles

A role represents a user workspace, and is assigned to a type of user, such as a system administrator or a customer service representative.

NOTE: After defining roles, you assign them to users through the Data Manager utility (see Chapter 3, “Data Manager)."

You can define role settings for the following groups:

- Functionality - Determines the features of a given role.
- Logic - Controls minimum order amount and pricing displays for configured items.
- Security - Controls whether you can view product availability data and modify product sourcing information.

The following table shows the default roles as shown in the System Administration Web and their corresponding setting in the Application Administration Web:

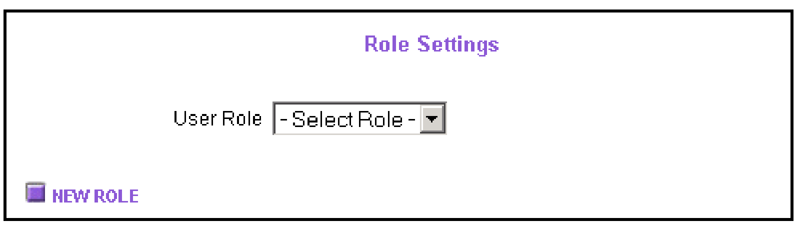
System Administration Web Setting	Application Administration Web Setting
Administrator	System Administrators
CustomerService	Customer Service Reps
GuestUser	Guest Users
User	General Users

The default setting values are the same for all predefined roles:

Group	Settings	Default Value
Functionality	Allow Edit of Order Specific Addresses?	No
IOE	Allow order note entry	Yes
	Allow Quotes	Yes
	Allow Navigation to Party Profile	Yes
	Allow Navigation to Order Pad	Yes
	Allow Navigation to Order Status	Yes
	Allow Navigation to Rapid Order Entry	Yes
	Allow Navigation to Reports	Yes
	Allow Navigation to Shopping Cart	Yes
Logic	Price to Display for Configured Items	Base Price
	Default Minimum Order Amount	5.00
Security	Authorization Level for Viewing/Modifying Product Availability/Sourcing	Allow viewing and modification of detailed availability

Accessing Role Settings

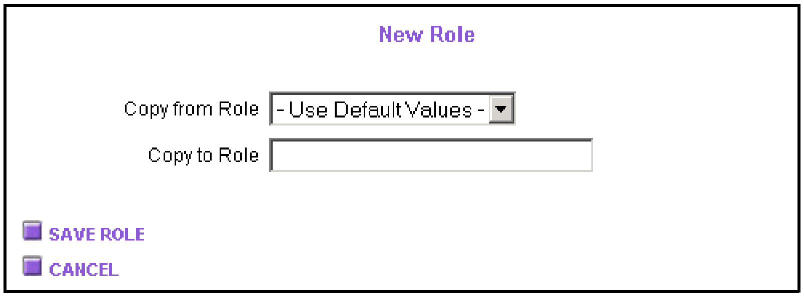
1. In the System Administration Web, click the **Settings** tab.
2. On the sidebar, click **Role**. The Role Settings page displays.



Adding a Role

If a role you need to set up is similar to an existing one, you can copy the settings from the existing role to a new one. Or, you can copy the default role settings to a new role. Follow these steps:

1. In the Role Settings page, click **NEW ROLE**. The New Role page displays.



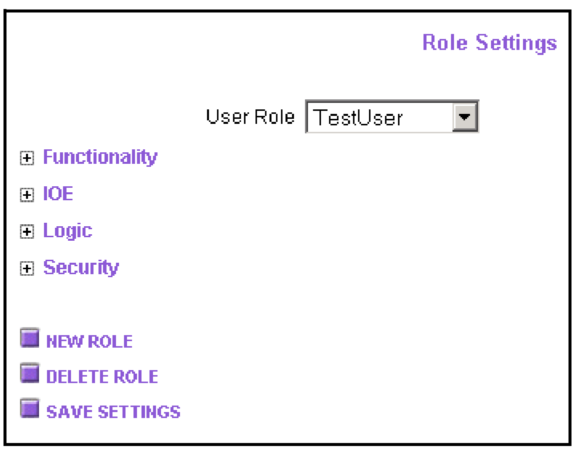
2. Fill in information in the following fields:
   - Copy From Role - Select the role to copy the settings from, or select **Use Default Values** to use the default role settings.
   - Copy To Role - Enter a unique name for the role.
3. Click **SAVE ROLE**.

After adding a role, you should review and modify its settings, as necessary.

Defining a Role's Settings

After you have added a role, it becomes available in the User Role field in the Role Settings page. Because you copied the settings from another role, you will probably need to modify them for the newly added role. Follow these steps:

1. In the User Role field in the Role Settings page, select the role whose settings you want to define. The lower part of the page is updated with the Functionality, Logic and Security groups.

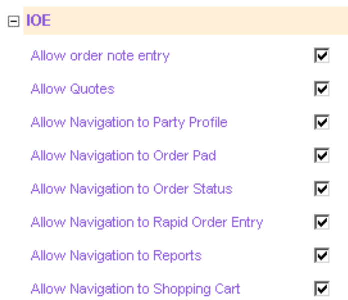


2. Click **+** next to the Functionality group to expand it.

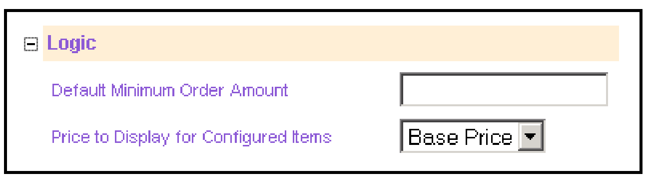
3. If you want users who are assigned this role to be able to modify order billing and shipping addresses on the CRM Web site, select the Allow Edit of Order Specific Addresses? check box.

   NOTE: If you are integrating CRM/Customer Center with your enterprise system, make sure that you do *not* select this check box.

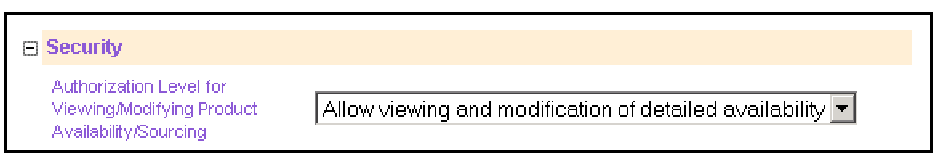
4. Click the + next to the IOE group to expand it.



5. Select the check boxes for the functions you want this role to use. Clear the check boxes for the functions you want to prevent the role from using.
6. Click the **+** next to the Logic group to expand it:



7. Define the following settings:
   - Default Minimum Order Amount - Enter the minimum order amount in CRM.
   - Price to Display for Configured Items - Select the price to display for configured parts. Your options are **Base Price** and **List Price**.
8. Click **+** next to the Security group to expand it.



9. In the Authorization Level for Viewing/Modifying Product Availability/Sourcing field, select the level of authorization from these options:
   - Hide availability - Users will not be able to check availability.
   - Allow viewing of summary availability - Users will be able to see site selection options; however, they will be able to view only the available quantity for the line item.
   - Allow viewing and modification of detailed availability - Users will be able to see site selection options and override the selected site. The initial site selection is based on the selection rule, which is determined by their login ID. If a user accesses the Product Catalog view without first selecting a customer account, the sourcing rule for the "anonymous" customer will be used.
10. Click **SAVE SETTINGS**.

Deleting a Role

If you no longer need to use a role, first make sure that no users are assigned to it in the Data Manager. Then, follow these steps to delete it from the System Administration Web:

1. In the User Role field in the Role Settings page, select the role you want to delete.
2. Click **DELETE ROLE**.
3. When prompted, click **OK** to confirm the deletion.

Sequence Assignment

You can define numbering sequences for each type of transaction you support in CRM/ Customer Center. For example, an order acknowledgement is a transaction type whose record includes the TransactionID field as one of its data columns; you can define a numbering sequence for this column.

You can also define numbering sequences for other fields that are automatically numbered, such as customer ship to IDs.

In each numbering scheme, you can:

- Identify the starting and ending numbers, the increment value, the current transaction number, and the number of digits in the numbering sequence
- Precede the numeric portion with one or more literal characters
- Indicate whether or not the system will automatically send an e-mail notification when the final number in the sequence has been reached

You define numbering sequences for transactions in sequence assignment rules. Two rules are predefined for you: **Electronic Commerce** and **Supplier Response**.

NOTE: You can define new sequence assignment rules and transactions, but you must also create the corresponding Microsoft Visual Basic server code for them to operate correctly.

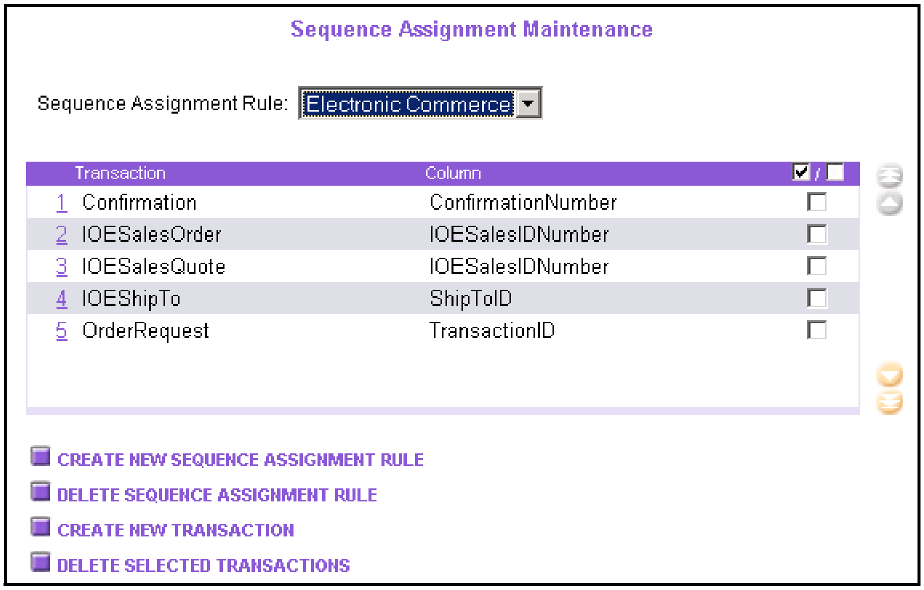
You can define numbering sequences for the following transactions and associated columns:

Sequence Rule	**Transaction Type**	**Column**
Electronic Commerce	Confirmation	ConfirmationNumber
	IOESalesOrder	IOESalesIDNumber
	IOESalesQuote	IOESalesIDNumber
	ECExportPostSQL	ProcessSequence
	IOEShipTo	ShipToID
	OrderRequest	TransactionID
Supplier Response	OrderAcknowledgement	TransactionID
	OrderRequest	TransactionID

Accessing Sequence Assignments

1. On the System Administration Web, click the **Settings** tab.

2. On the sidebar, click **Sequence Assignment**. The Sequence Assignment Maintenance page displays.



3. By default, the Sequence Assignment Rule field is set to **Electronic Commerce**. If you want to work with a different sequence assignment rule, select it from the list.

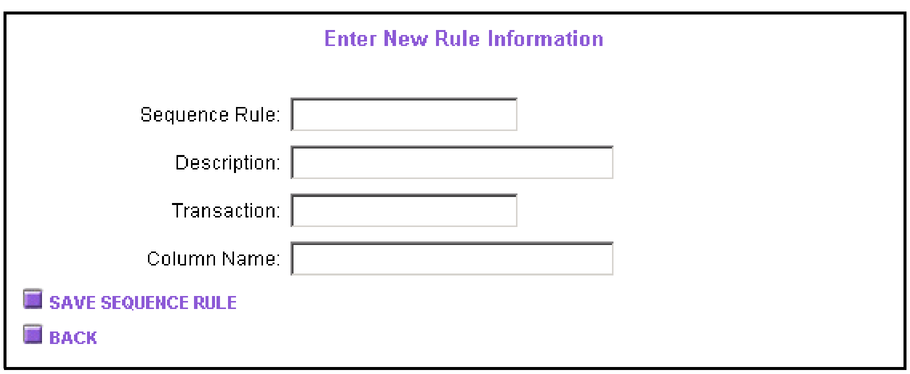
Adding a Sequence Assignment Rule

A sequence assignment rule identifies a numbering scheme for one or more transaction types. Although several predefined rules and numbering sequences are predefined, you may need to define new assignment rules and their associated transaction numbering sequences.

For example, the Electronic Commerce rule identifies a number sequence for sales orders, but you might want to define another rule that contains a different sequence for sales orders that you could switch to at different times or for special circumstances.

NOTE You can define new sequence assignment rules and transactions, but you must also create the corresponding Microsoft Visual Basic server code for them to operate correctly.

1. In the Sequence Assignment Maintenance page, click **CREATE NEW SEQUENCE ASSIGNMENT RULE**. The Enter New Rule Information page displays in Add mode.



2. Fill in information in the following fields:
   - Sequence Rule - Enter a unique name for the sequence rule.
   - Description - Enter a description of the sequence rule for reference.

- Transaction - Enter the name of the first transaction for this rule. You can add other transactions to this rule by following the steps in the next procedure.
- Column Name - Enter the column name of the field you are defining the numbering sequence for.

3. Click **SAVE SEQUENCE RULE**.

Adding Transactions to a Rule

You may want to add a new transaction to an existing sequence assignment rule. For example, you might develop a new type of e-commerce transaction that requires a new record with its own numbering sequence.

NOTE: You can define new transactions for existing sequence assignment rules, but you must also create the corresponding Visual Basic server code for them to operate correctly.

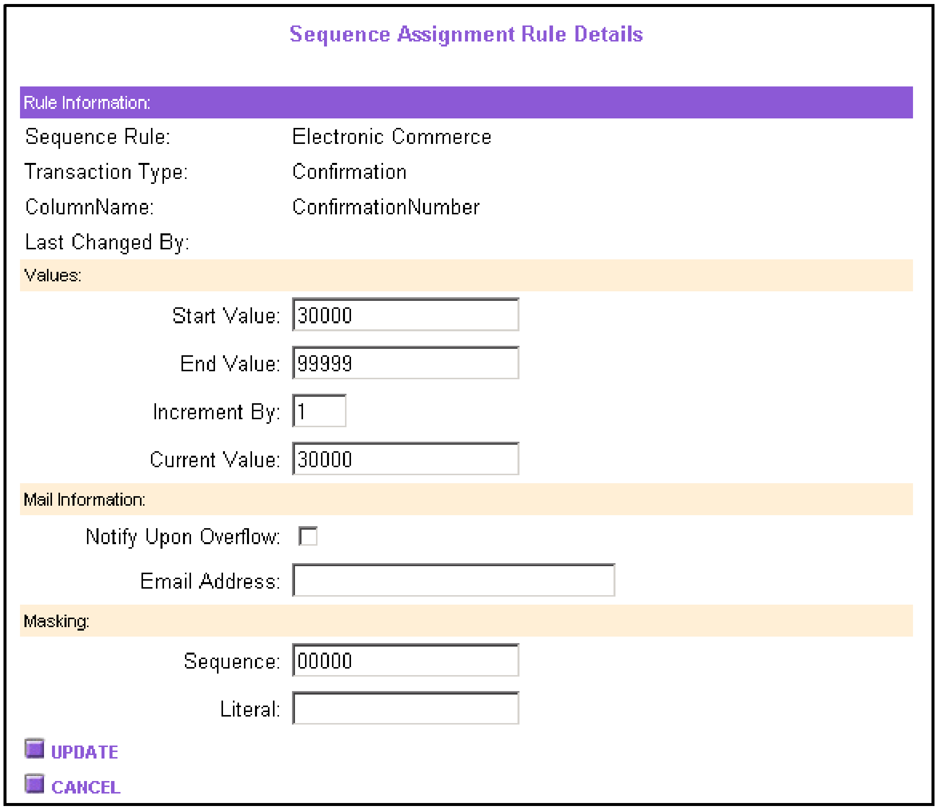
1. In the Sequence Assignment Rule field in the Sequence Assignment Maintenance page, select the rule you want to add a transaction to. The lower half of the page is updated with a list of all the transactions that have been defined for the selected rule.
2. Click **CREATE NEW TRANSACTION**. The Enter New Rule Information page displays in Edit mode so that you can add a transaction to the selected rule.

3. The name and description of the selected sequence rule are displayed for reference. Fill in information in the following fields:
   - Transaction - Enter the name of the new transaction.
   - Column Name - Enter the name of the column (field) you are defining the sequence for.
4. Click **SAVE TRANSACTION**. You are returned to the Sequence Assignment Maintenance page.

Defining the Numbering Sequence for a Transaction

1. In the Sequence Assignment Rule field in the Sequence Assignment Maintenance page, select the rule you want to work with. The lower half of the page is updated with a list of all the transactions that have been defined for the selected rule.

2. In the left-most column of the grid, click the link of the transaction whose numbering sequence you want to define. The Sequence Assignment Rule Details page displays.



3. Fill in information in the following fields:
   - Start Value - Enter the first number in the sequence, such as 00001.
   - End Value - Enter the last number in the sequence, such as 99999.
   - Increment By - Enter the value to increment the numbers by, such as 1.
   - Current Value - Enter the number of the current transaction, such as 000001. Typically, this number will be the same as the starting value. The system automatically updates this value as it assigns numbers.
   - Notify Upon Overflow - Select this check box if you want to send an e-mail notification when the ending value has been reached.
   - Email Address - If you selected the Notify Upon Overflow check box, enter the e-mail address where the notification will be sent.
   - Sequence - For each digit in the number, enter **0** as a place-holder. For example, if a number is 6 digits in length, enter **000000**.You can use a maximum of 10 digits.
   - Literal - Enter the literal characters that precede the numeric portion of the ID, if applicable. For example, you might begin all quote numbers begin with the letter **Q**. You can use a maximum of 5 literal characters in a sequence number.
4. Click **UPDATE**.

Deleting Transactions from a Rule

If you are no longer using number sequencing for a transaction, you can remove the transaction from the sequence assignment rule.

NOTE: If you delete a transaction from a sequence assignment rule, the system will also remove its associated numbering sequence.

1. In the Sequence Assignment Rule field in the Sequence Assignment Maintenance page, select the rule that contains the transaction you want to delete. The lower half of the page is updated with a list of all the transactions that have been defined for the selected rule.
2. In the right-most column of the grid, select the check box of each transaction you want to delete.
3. Click **DELETE SELECTED TRANSACTIONS**.

Deleting Sequence Assignment Rules

1. In the Sequence Assignment Rule field in the Sequence Assignment Maintenance page, select the rule you want to delete. The lower half of the page is updated with a list of all the transactions that have been defined for the selected rule.
2. Click **DELETE SEQUENCE ASSIGNMENT RULE**.

NOTE: If you delete a sequence assignment rule, all the transactions that are assigned to the rule and their associated numbering sequences are also deleted.

15

Customizing MAPICS Customer Center

Use the information in this chapter to customize your MAPICS Customer Center customer-facing web site.

Style Sheet Layout

These components can be customized in any manner you wish in order to achieve the design you want.

- **\includes\page_header** - Displays all of the information on the top portion of the screen, including the company image, user information, shopping cart item count, and a quick product search function.
- **\includes\page_footer** - The default is blank, but it could display common footer information, if applicable.
- **\includes\block_navigation** - Builds the navigation menu for the user.

Customizable Elements

The following elements are available for adding to your web pages. The person setting up the site can include any of these by making changes in the **\includes** directory.

- **Login area** - Use this area to log in from any page. (The login capability is not available in the default user interface.) Once you are logged on, this area is updated with your login ID and customer number.
- **Product Search Box** - Use this box to search for products. You do not need to log on before using this area. Search criteria can include **Part Description** (keyword), **Manufacturer**, **Part Number**, and **Product Category**. See Searching for Products for more information about how this works.
- **Shopping Cart Preview** - This area provides a summary of the products you have added to the shopping cart. It shows the line number, part number, quantity, and price of each item that has been added to the cart. It also shows the total number of lines, and the subtotal before taxes and any charges. The lines are not added to the actual order until you select **Check Out**. If the **Shopping Cart** contains more lines than can be displayed in this area, scroll arrows are added.
- **News Areas** - You can update the following files for updating news sections. These sections display when you access the Marketing, Sales, and Service portals in MAPICS Customer Center.
  - **\Clients_0001\portal\marketingnews.htm** - displays marketing information
  - **\Clients_0001\portal\salesnews.htm** - displays sales information
  - **\Clients_0001\portal\servicenews.htm** - displays service information
- **Featured Products** - This area can be used to highlight product news. Clicking a link in this area could display a particular product in the **Product Search Results** page. To update the page with the product you want to feature, update this file:

  \components\customercenter\web\includes\block_news.asp

- **Advertising Information** - The area to the right of the company logo is available for displaying advertising information. You can insert your own corporate advertising information. To update the advertising that displays on the site home page, update these files:
  - **\components\customercenter\web\includes\block_advertising.asp** - update the file name **everyotherstep.gif** to the file name of the advertising graphic.
  - **\components\customercenter\web\everyotherstep.gif** - add the file name of the advertising graphic in GIF format.

Changing the Default Company Logo

A company logo is displayed in the upper-left part of the page. Clicking this logo displays a corporate home page. Administrators will want to replace this logo with a graphic of the company's logo, and revise the link so that it takes users to the company's home page.

To change the logo to your corporate logo, replace the **logo.jpg** file located in the directory **\images\logo.jpg**.

Updating the Legal Notice and Privacy Statement

The bottom of the page contains an area for displaying your copyright information. It also contains customizable links to such things as the top of the page, a site map, an e-mail/feedback page, the legal notice, and a privacy statement. You can use a standard HTML or text editor to modify the links in this area.

To update the copyright, legal notice, and privacy statement that displays, update these files:

- **\components\customercenter\web\Standard_LegalNotice.asp**
- **\components\customercenter\web\Standard_PrivacyStatement.asp**

Alternate User Areas

You can change the overall appearance of the MAPICS Customer Center Web pages by running a batch file script on the Web server. The batch file copies an alternate set of XSL style sheets into the directory **\Program Files\Frontstep\Components\CustomerCenter\Web**.

In the customization examples in this chapter, the default Web pages are shown. However, if you want to use the alternate style sheets as the templates for your customizations, run the **basic.bat** file located in the directory **\Program Files\Frontstep\Components\CustomerCenter\Web\UI-Install** as described in the *MAPICS CRM/Customer Center Installation Guide*.

After you decide on a starting set of style sheets to use, remove the **\UI-Install** directory.

NOTE: If changes have already been made to the current project, running these scripts will overwrite existing style sheets in the web project.

Translating Web Pages in MAPICS Customer Center

Use the following steps to translate style sheets and ASP pages in MAPICS Customer Center.

1. On the server used for translation, set your default locale, and locale, to the target language, such as Simplified Chinese and Chinese (PRC) for Simplified Chinese translations.
2. Copy the BaseTranslation.xml to *lang*.xml, where *lang* is the target language (for example, **SChinese.xml**).

A

Order Configuration

> **NOTE:** Order Configuration is available only when CRM is integrated with SyteLine ERP.

MAPICS Order Configuration enables you to sell configurable products through MAPICS CRM. Before you can do so, however, you must:

- Create the configuration models
- Prepare the configuration models for the Web
- Add configurable products
- Select which price will be displayed for configurable parts.

Note that you must first install the Order Configuration component before you can begin creating the configuration models.

Creating the Order Configuration Models

> **NOTE:** The configuration model is usually created by someone other than the system administrator. This information is provided for background information.

1. Define your product lines on paper—that is, develop your configuration models.
2. You can define different models for different product lines; however, if your product lines are very similar and related, you might want to include them in a single model. In MAPICS Configuration, you would combine them into **product classes**.
3. Define your **part classes** with their attributes, such as weight, size and color. Then, develop a hierarchy of part classes with as many levels as necessary. Child classes inherit the attributes of the parent class; they can also have some of their own attributes. Examples of part classes might be "Accessories" for a parent class, and "Safety Accessories" and "Comfort Accessories" for child classes.
4. Add **parts** to the lowest level of each part class in the part class hierarchy you developed in the previous step. Each part inherits the attributes of its parent class; if necessary, add more attributes to the part. Examples of parts in the "Safety Accessories" part class might be "Reflectors - Rear," "Reflectors - Front" and "Flag."
5. Add **products** to the lowest level of each product class in the product class hierarchy you developed in step 2. You can use the parts list developed in step 3 to create each product definition. A product inherits attributes from its product class, but you can add more attributes to the product, if necessary. An example of a product under the product class "Custom Bikes" might be "Speed Racer."

6. For each product you created in step 5, define its component part in MAPICS Configuration by dragging and dropping the appropriate part or part class into one of the following **product definition** categories:
   - Included (in the standard product)
   - Required Choice (the user must select)
   - Optional (the user may select)
7. Assign your part-to-part relationships (**rules**) for each product you defined in step 5. Rules govern which combinations of features are valid, mutually exclusive, or constrained. The Order Configuration component uses these rules to validate a user's choice of features.
8. Sometimes a rule needs further definition. You can add **constraints** to the rule, which are special restrictions or requirements that must be satisfied for the rule to be true.
9. If necessary, assign **effective dates** to product classes, part classes, or rules. Effective dates determine whether a part will be available as a selectable item in the model at runtime; and for rules and constraints, they determine whether the rule will be active in the model during runtime.
10. When you add parts to a product definition's required choice or optional area, you may specify the number of parts users can or must select from the part class. For example, the user must select an exterior color, but no more than one. The minimum number of parts that must be selected from the part class is the value of the *minimum* attribute; the maximum number of parts that can be selected from a part class is the value of the *maximum* attribute. In the Order Configuration component, these values are known as **Min/Max** values.
11. Compile the configuration model.

NOTE

Additional information regarding configuration model development is available in *The Order Configuration Getting Started* and *Advanced Topics* guides.

Preparing Order Configuration Models for the Web

After you have created your configuration model in the Order Configuration component, you must convert it to XML format for use by CRM, using the Model Generating utility (**SMXGenModels.exe**) and the User Interface (UI) Wizard.

In addition, you must use the Order Configuration Registry Update utility to tell MAPICS CRM where to look for the configuration models.

Model Generating Utility

NOTE

The configuration model is usually created by someone other than the system administrator. This information is provided for background information.

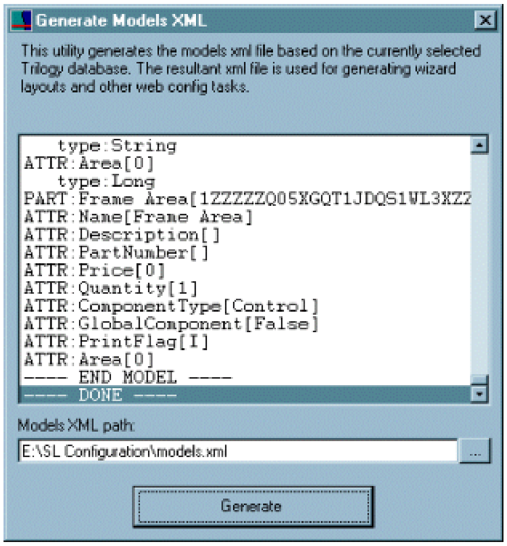
The Model Generating Utility processes the configuration models, contained in the backbone, and generates an XML file, based on the configuration model structure. This file is used for UI Wizard layouts and other Web configuration tasks.

You can launch this utility from the UI Wizard, or you can run it as a standalone application as described here.

1. In Windows Explorer, locate the directory where you installed the utility, and then double-click **SMXGenModelsXML.exe**.

2. In the dialog box that displays, select the path where the model's XML file will be generated, and click **Generate**.

   As the utility generates the **models.xml** file, information displays in the dialog box to keep you apprised of the process.



3. When the utility has finished generating the XML file, the message "DONE" will display in the dialog box.

User Interface Wizard

NOTE: The configuration model is usually created by someone other than the system administrator. This information is provided for background information.

With the UI Wizard, you can create the Web layout of the configuration model in XML.

NOTE: Make sure that you are pointing to the correct configuration model database.

1. In Visual Basic, click the **User Interface Wizard** icon under the New tab. The initial screen of the wizard displays.
2. When prompted, load a template (.sct) file. The Definition screen displays.
3. In the Model field, select the name of the configuration model.
4. In the Main Screen Title field, enter the title of the layout name title.
5. Select the **Web Layout** option. Based on your selection, some options will be disabled.
6. In the Application Title field, enter the Web layout file name.
7. In the Template Directory field, select the directory where the template resides.
8. Select the XML Layout File Path.
9. Select the Models XML File Path for the **models.xml** file.
10. Click **Next** to continue through the UI wizard to complete the Web page layout, part attribute setup, and XSL file path.

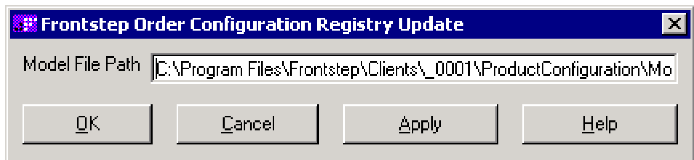
11. When you are done, click **Finish**. Then, respond to the prompt to save the template.

For more information, refer to the UI Wizard online help.

Using the Order Configuration Registry Update Utility

After the Web layout of the configuration models are available, you need to identify the path where the models are located, using the Order Configuration Registry Update utility.

1. Click **Start>Programs>MAPICS>Setup>Configuration Tool**.
2. In the Configuration Tool, select **Launch>Order Configuration Registry Setup**.



3. In the Model File Path field, identify the path where the Order Configuration models are located.

You must specify the correct path here. Otherwise, the Order Configuration component will not work properly in MAPICS CRM.

4. Click **OK** to save the setting and close the dialog.
5. A message informs you that the registry was updated. Click **OK**.

Adding Configurable Products to MAPICS CRM

You can automatically upload product data from your enterprise system, using data synchronization; see the *SyteLine ERP Integration with CRM, Customer Center, and Supply Chain Management* guide or *MAPICS CRM to MAPICS ERP for iSeries Integration* guide for more information.

Define Product Classes for Configurable Products

First, you need to define product classes that contain configurable products. When a user searches for configurable products on the Web site, those products will be organized by category. For information about setting up product classes, see “Classifications” on page 7-1.

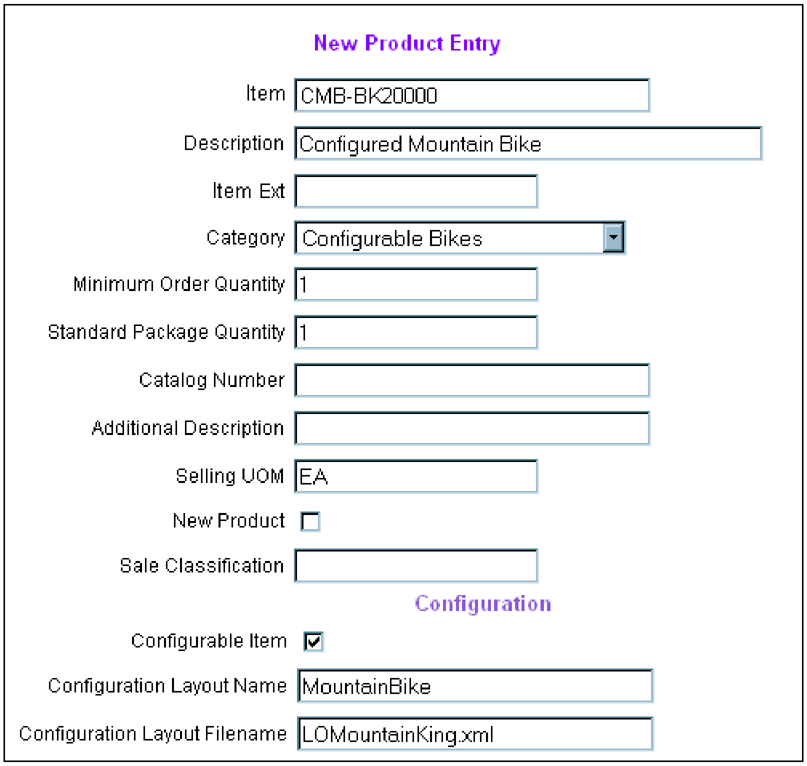
For example, under your **Bikes** class you might set up a subordinate class called **Configured Bikes**.

Set up Product Information for Configurable Products

After setting up your product class, you can begin to add the configurable products. To add a configurable product manually, do the following:

1. On the Application Administration Web, click the **Product** tab.
2. On the sidebar, click **Product Catalog**.

3. Click **NEW PRODUCT**. The New Product Entry page displays.



4. Follow the steps for adding a product in “Adding a Product” on page 5-2.
5. Because the product is configurable, fill in information in the following fields in the Configuration area:
   - Configurable Item - Select this check box to indicate that the item is configurable. If the Order Configuration component is installed, when this product is ordered in MAPICS CRM, the customer will need to select its configuration options.
   - Configuration Layout Name - Enter the layout name to be used to configure this product, such as **Mountain Bikes**.
   - Configuration Layout Filename - Enter the name of the XML file that contains the configuration layout for this product. Although you can also specify the path where the file is located, we recommend that you use the Order Configuration Registry Update utility to set this path instead to save the configured product.
6. Click **SAVE RECORD**.

Choosing the Type of Price to Display for Configurable Products

The final step in implementing the Order Configuration component is to select the type of price to be displayed when users configure products in MAPICS CRM.

1. On the System Administration Web, click the **Settings** tab.
2. On the sidebar, click **Role**. The Role Settings page displays.
3. In the User Role field, select the role you want to work with.
4. Click the plus (**+**) sign next to the Logic group to expand it.
5. In the Price to Display for Configured Items field, select **Base Price**.

6. Click **SAVE SETTING**S.

Updating Products and Prices

On a daily basis—or more frequently, if your prices change more than once a day—you should upload products and prices from your enterprise system. To create a daily batch update, using MAPICS Active Link, contact MAPICS (see the **Preface**).

NOTE: Any products added to MAPICS CRM must have product prices (even if they are zero). Products without pricing will return errors.

B

Importing and Loading Data

This appendix applies to MAPICS CRM.

The Data Manager includes utilities that are designed specifically to import data from various types of databases. This chapter discusses the following topics:

- Importing Generic Data
- Importing Data from Act!
- Importing Data from Goldmine

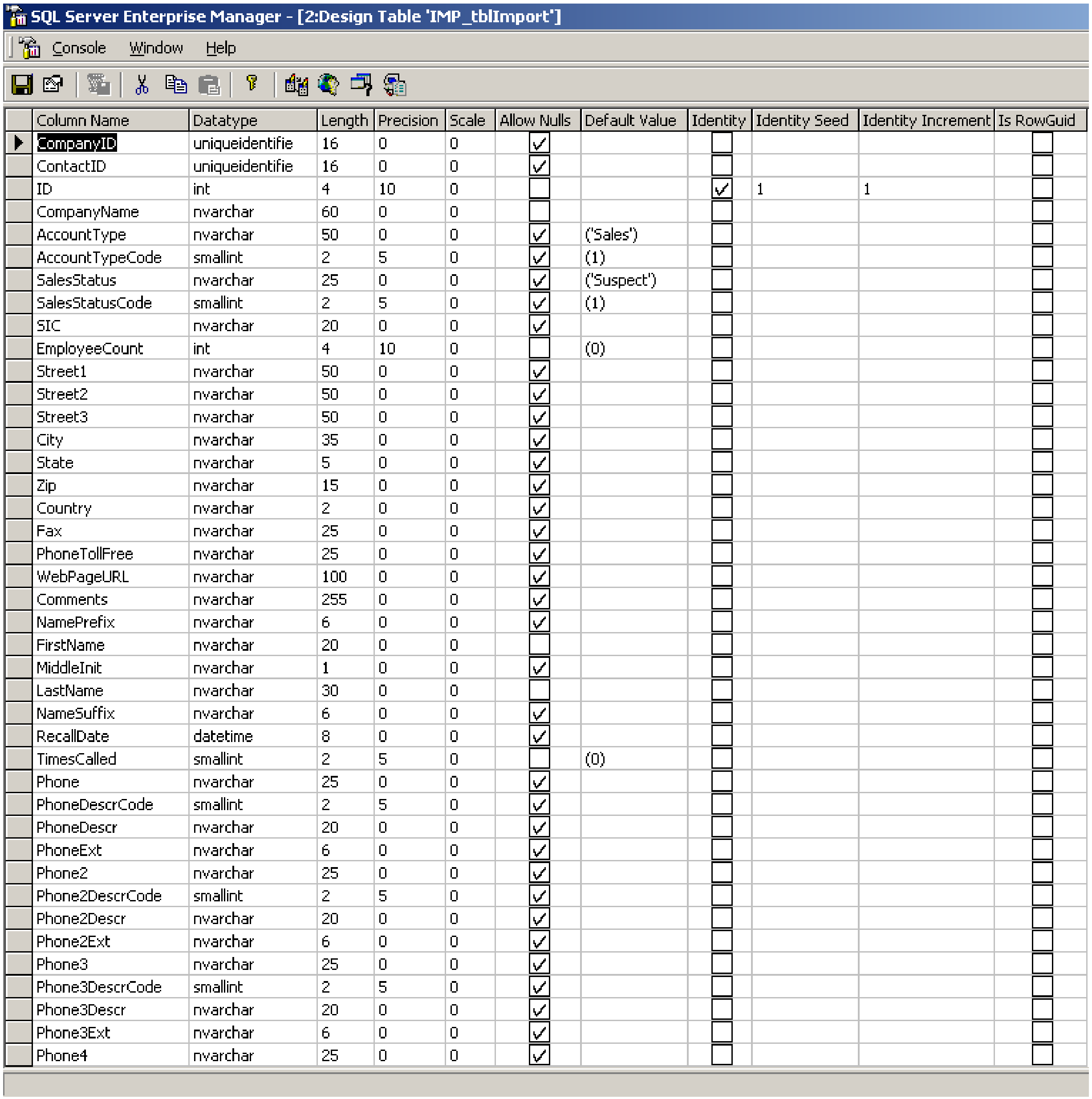
Importing Generic Data

If your current data is in a form other than Act! or Goldmine, you can use an alternate method. Loading generic data into MAPICS CRM is a two-step process. First, the data is converted from its original source and imported to a SQL Server table. Second, it is converted to MAPICS CRM data.

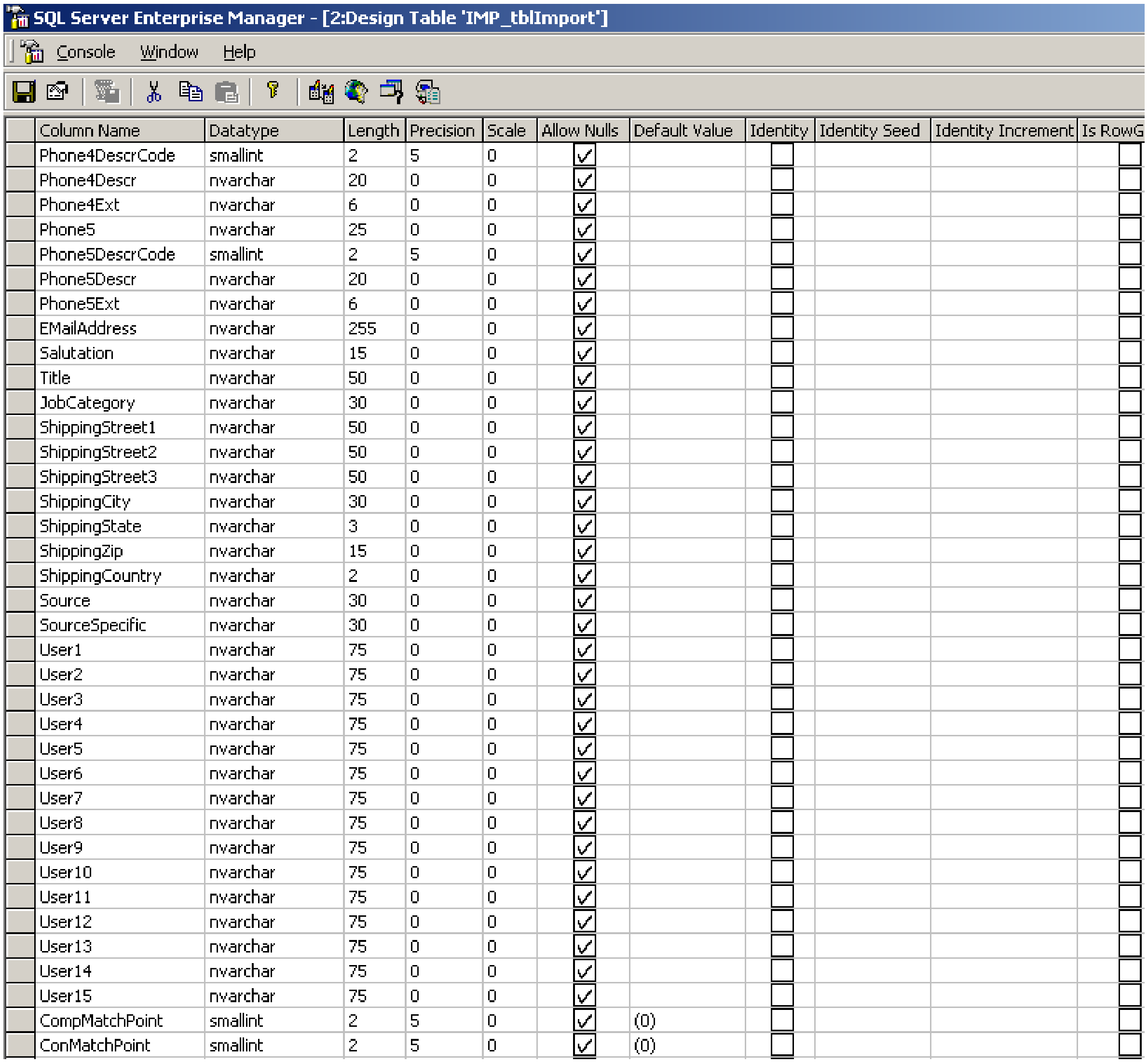
Moving Data into IMP_tblImport

The SQL Server table **IMP_tblImport** acts as a staging table for converted data. You may use any tool you want to get data into the **IMP_tblImport** table. The following figures show an example imported table.

The required fields for importing data are **CompanyName**, **FirstName**, and **LastName**. Once your data is in this table, you are ready to run the import utility.



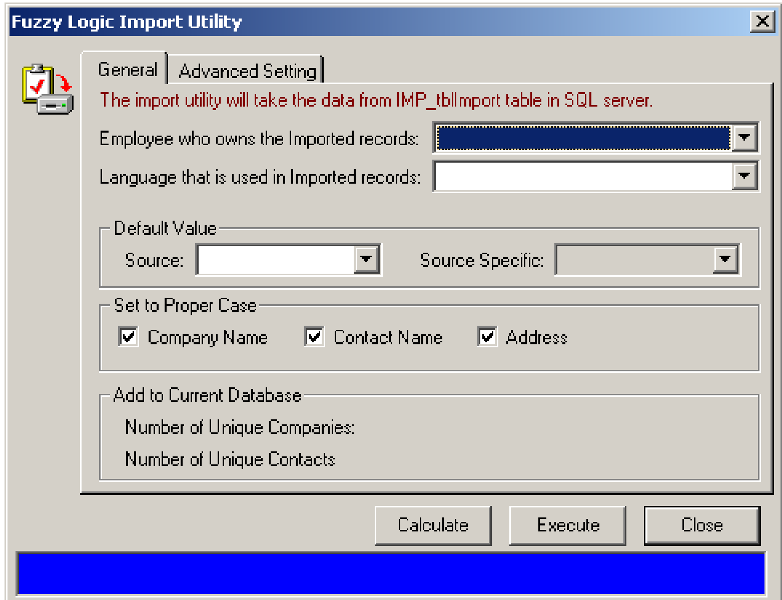
Column Name	Datatype	Length	Precision	Scale	Allow Nulls	Default Value	Identity	Identity Seed	Identity Increment	Is RowGuid
CompanyID	uniqueidentifie	16	0	0	✓					
ContactID	uniqueidentifie	16	0	0	✓					
ID	int	4	10	0			✓	1	1	
CompanyName	nvarchar	60	0	0						
AccountType	nvarchar	50	0	0	✓	('Sales')				
AccountTypeCode	smallint	2	5	0	✓	(1)				
SalesStatus	nvarchar	25	0	0	✓	('Suspect')				
SalesStatusCode	smallint	2	5	0	✓	(1)				
SIC	nvarchar	20	0	0	✓					
EmployeeCount	int	4	10	0		(0)				
Street1	nvarchar	50	0	0	✓					
Street2	nvarchar	50	0	0	✓					
Street3	nvarchar	50	0	0	✓					
City	nvarchar	35	0	0	✓					
State	nvarchar	5	0	0	✓					
Zip	nvarchar	15	0	0	✓					
Country	nvarchar	2	0	0	✓					
Fax	nvarchar	25	0	0	✓					
PhoneTollFree	nvarchar	25	0	0	✓					
WebPageURL	nvarchar	100	0	0	✓					
Comments	nvarchar	255	0	0	✓					
NamePrefix	nvarchar	6	0	0	✓					
FirstName	nvarchar	20	0	0						
MiddleInit	nvarchar	1	0	0	✓					
LastName	nvarchar	30	0	0						
NameSuffix	nvarchar	6	0	0	✓					
RecallDate	datetime	8	0	0	✓					
TimesCalled	smallint	2	5	0		(0)				
Phone	nvarchar	25	0	0	✓					
PhoneDescrCode	smallint	2	5	0	✓					
PhoneDescr	nvarchar	20	0	0	✓					
PhoneExt	nvarchar	6	0	0	✓					
Phone2	nvarchar	25	0	0	✓					
Phone2DescrCode	smallint	2	5	0	✓					
Phone2Descr	nvarchar	20	0	0	✓					
Phone2Ext	nvarchar	6	0	0	✓					
Phone3	nvarchar	25	0	0	✓					
Phone3DescrCode	smallint	2	5	0	✓					
Phone3Descr	nvarchar	20	0	0	✓					
Phone3Ext	nvarchar	6	0	0	✓					
Phone4	nvarchar	25	0	0	✓					



Column Name	Datatype	Length	Precision	Scale	Allow Nulls	Default Value	Identity	Identity Seed	Identity Increment	Is RowG
Phone4DescrCode	smallint	2	5	0	✓					
Phone4Descr	nvarchar	20	0	0	✓					
Phone4Ext	nvarchar	6	0	0	✓					
Phone5	nvarchar	25	0	0	✓					
Phone5DescrCode	smallint	2	5	0	✓					
Phone5Descr	nvarchar	20	0	0	✓					
Phone5Ext	nvarchar	6	0	0	✓					
EMailAddress	nvarchar	255	0	0	✓					
Salutation	nvarchar	15	0	0	✓					
Title	nvarchar	50	0	0	✓					
JobCategory	nvarchar	30	0	0	✓					
ShippingStreet1	nvarchar	50	0	0	✓					
ShippingStreet2	nvarchar	50	0	0	✓					
ShippingStreet3	nvarchar	50	0	0	✓					
ShippingCity	nvarchar	30	0	0	✓					
ShippingState	nvarchar	3	0	0	✓					
ShippingZip	nvarchar	15	0	0	✓					
ShippingCountry	nvarchar	2	0	0	✓					
Source	nvarchar	30	0	0	✓					
SourceSpecific	nvarchar	30	0	0	✓					
User1	nvarchar	75	0	0	✓					
User2	nvarchar	75	0	0	✓					
User3	nvarchar	75	0	0	✓					
User4	nvarchar	75	0	0	✓					
User5	nvarchar	75	0	0	✓					
User6	nvarchar	75	0	0	✓					
User7	nvarchar	75	0	0	✓					
User8	nvarchar	75	0	0	✓					
User9	nvarchar	75	0	0	✓					
User10	nvarchar	75	0	0	✓					
User11	nvarchar	75	0	0	✓					
User12	nvarchar	75	0	0	✓					
User13	nvarchar	75	0	0	✓					
User14	nvarchar	75	0	0	✓					
User15	nvarchar	75	0	0	✓					
CompMatchPoint	smallint	2	5	0	✓	(0)				
ConMatchPoint	smallint	2	5	0	✓	(0)				

Importing Data from the IMP_tblImport Table

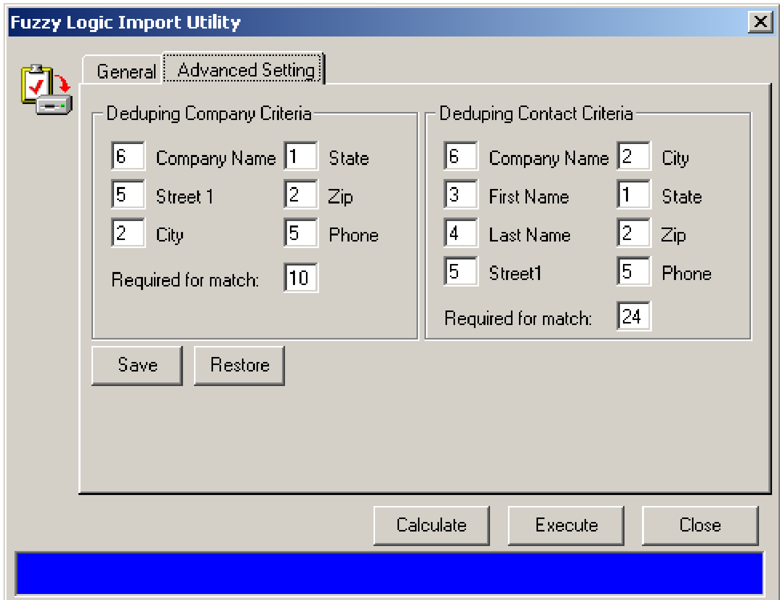
1. In the Data Manager, double-click **Import from IMP_tblImport** to load the import utility. The Fuzzy Logic Import Utility dialog displays.



2. In the Employee field, select the employee who will own the imported records.
3. In the Language field, select the language that will be used.
4. If you want, select the company source value in the Source field. This field enables you to set a group of records that are going to be imported at once to the same source value.
5. If you selected a source, you can select a source-specific value. The values contained in the Source Specific field depend on the source you selected.
6. Select any check boxes in the Proper Case area to capitalize the first letter of each word of the imported record. If you do not select any of the check boxes, the record will be imported exactly as it appears in the database.
7. To continue, click the **Advanced Setting** tab.

Filtering Duplicate Records

You can filter duplicate records, based on company and/or contact information, using fuzzy logic criteria under the import utility's Advanced Setting tab. Company information is used in the following example. The Contact filtering functionality works the same.



The numbers displayed next to the field names are default values that MAPICS has determined are the best general numbers to use for fuzzy logic calculation. In the Deduping Company Criteria section of this dialog, the number **10** in the Required for match field is the minimum value that must be attained for a record to be considered a duplicate. This minimum value is calculated by adding the numbers listed in the fields above it. For example, the value given to Company Name is **6**. This number is smaller than 10, so all company records in the **IMP_tblImport** table would be brought over, if this field is the only one with a value. However, if your record in the import table had the same company name and address as an existing record, the record in the import table would not be brought over. The logic behind this is as follows: Company Name value is **6**, Street 1 value is **5**, the sum of the two numbers is **11**—greater than the minimum value of 10 for the Required for match field. Thus the company record would be considered a duplicate and not imported.

To continue with filtering the records:

1. Click **Calculate** to see how many unique companies and contacts will be added to the database. This step is optional.
2. Click **Execute** to complete the data conversion.

Importing Data from Act!

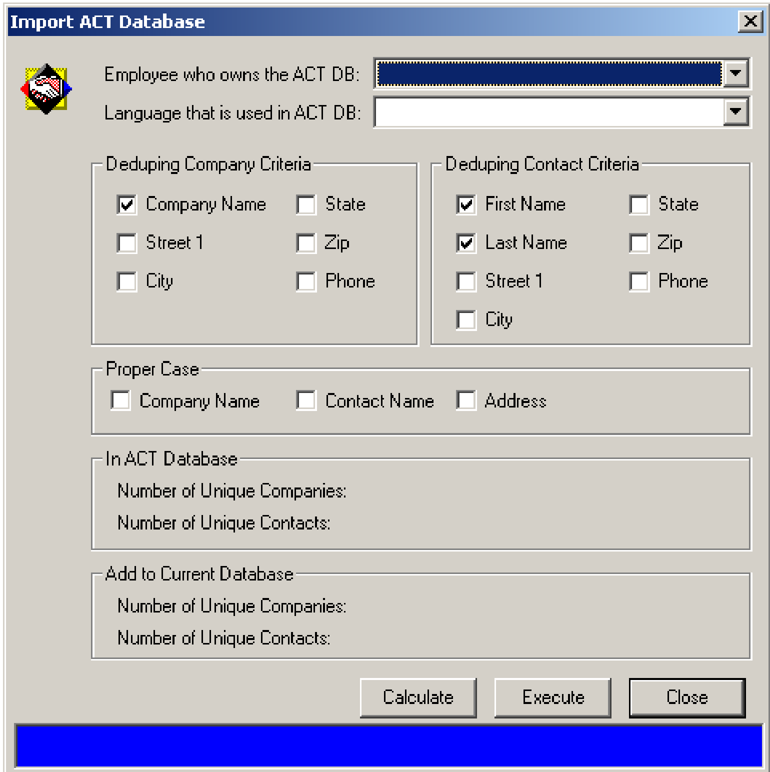
The Data Manager includes an import utility that is designed specifically to import data from Act! databases. Before you can use it, the Act! import utility must have the following conditions met:

- Act! 4.x is installed on the machine where the import will take place.
- The Act! database to be imported is an Act! 4.x database, or was upgraded to Act! 4.x.
- The user who will own the contacts, once they are converted to MAPICS CRM, is already added to the employee list in the Data Manager.

Once these conditions are met, you need to determine the level at which you want MAPICS CRM to convert your data. You can select various options to avoid converting duplicate records that already exist in a MAPICS database. We recommend that you run this utility on the server, or from a relatively powerful workstation, for the best performance.

To convert Act! data for use in MAPICS CRM, follow these steps:

1. Double-click **Import from Act DB** in the Import Utilities folder. The Import ACT Database dialog displays. Here, you can indicate how much data from the Act! database will be filtered for duplicate information and converted.



2. In the Employee field, select the employee who will be responsible for the accounts coming from Act!.
3. In the Language field, select the language that is used in your Act! database.
4. Select the fields that you want the import utility to compare when adding companies and contacts from the Act! database.

   For example, if the Company Name field is selected, the utility would not add a new company record to MAPICS CRM if the Act! database had a company name that matched exactly with a company name that currently exists in MAPICS CRM.

   However, if a company has multiple locations and each location needs a separate entry, select the Company Name and the Address fields to ensure that the utility merges only companies that have the same name and address.

   Contact data can be filtered and converted in the same way to the necessary level by selecting the appropriate fields.
5. Select any check boxes in the Proper Case area to capitalize the first letter of each word of the imported record. If you do not select any of the check boxes, the record will be imported exactly as it appears in the Act! database.

6. Click **Calculate** to see how many companies and contacts will be added once the utility filters and converts the data. If the information appears to be a correct, click **Execute** to import the data.

Importing Data from Goldmine

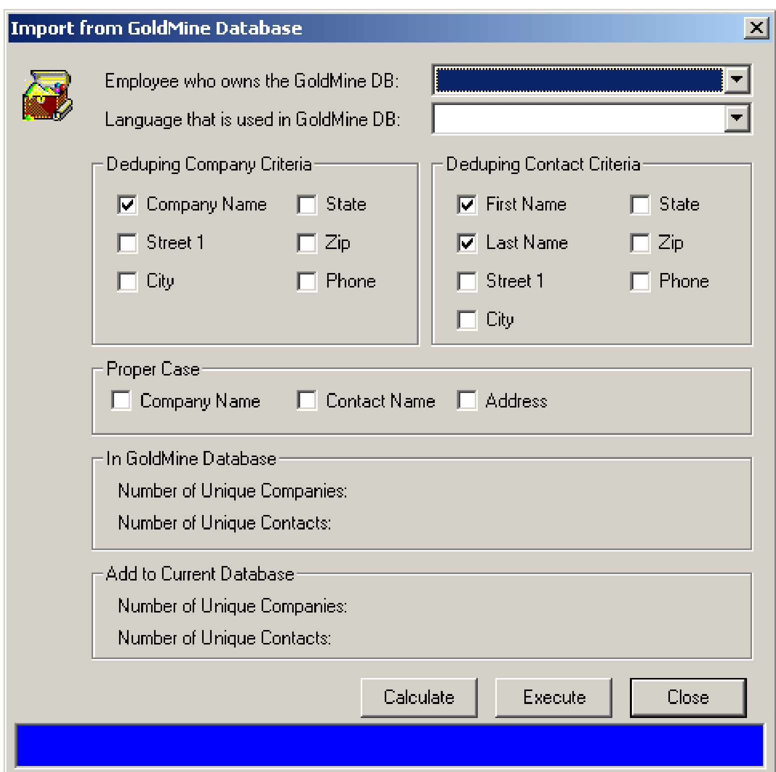
The Data Manager includes an import utility that is designed specifically to import data from Goldmine.

Before you can use it, the Goldmine import utility must have the following conditions met:

- Goldmine 4.x is installed on the machine where the import will take place.
- The Goldmine database to be imported is a version 4.x database, or was upgraded to version 4.x.
- The user who will own the contacts, once they are converted to MAPICS CRM, is already added to the employee list in the Data Manager.

To import Goldmine data, follow these steps:

1. Run Goldmine.
2. Load the Goldmine database you want to import.
3. Open the Data Manager, and double-click **Import from Goldmine** in the Import Utilities folder. The Import from Goldmine Database dialog displays. Here, you can indicate how much data from the Goldmine database will be filtered for duplicate information and converted



4. In the Employee field, select the employee who will be responsible for the accounts coming from Goldmine.
5. In the Language field, select the language that is used in your Goldmine database.

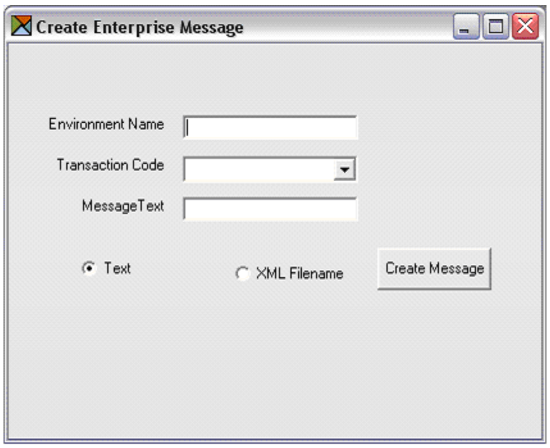
6. In the Deduping Company Criteria or Deduping Contact Criteria areas, select the fields in your database that the import utility will use for comparison. The import utility will not import records that have duplicate field values.
7. Select any check boxes in the Proper Case area to capitalize the first letter of each word of the imported record. If you do not to select any check boxes, the record will be imported exactly as it appears in the Goldmine database.
8. You can click **Calculate** to see the number of records that will be imported. If this information appears to be a correct, click **Execute** to import the data.

C

Additional CRM Utilities

Create Enterprise Message Utility

This utility allows system administrators to create or recreate a message for the Event Message Service to process. It is used to submit XML files into Active Link transaction codes where typically those codes normally accept XML strings.



This utility lets you resubmit integration flows which may have needed their original XML strings corrected and then resubmitted to Active Link. For example, something has failed in an Active Link flow, such as an integration flow where a CRM order is sent to the ERP system. If the problem can be resolved by modifying some value in the XML message, you can do the following:

1. Get the original XML message from the Application Administration Web, Active Link message audit review and save the XML as a file.
2. Edit the XML file to modify the value.
3. Run the utility and submit the XML file with the same original Active Link transaction code. Normally the transaction code is set up to only accept the XML as a parameter string but this utility takes in the XML as a file and turns it into a parameter string for use by the transaction code.

Usage

To use this utility, do the following:

1. Access the utility at **c:\Program Files\Frontstep\Tools\CreateEnterpriseMessage.exe**.
2. Enter the information in the following fields:
   - Environment Name - Enter the name of the CRM environment.
   - Transaction Code - If the environment name field has a valid environment name, the Transaction Code field shows a list of transaction codes available for use in that environment. Select the transaction code for which you wish to create an Enterprise Message. You can also manually enter the transaction code.
   - Message Text - Enter the Enterprise Message message text in the correct format, including delimiters if any. Alternately, if the message text is saved in XML format in a file, you can enter the file name and directory path here.
   - Text / XML Filename - Specify whether the Message Text field contains the actual message text or a file name.
3. Click **Create Message** to create the Enterprise Message for Event Message Service to process in the specified CRM environment.

Message Queue Reader

This utility reads the messages in an MSMQ. This is mainly used for debugging purposes with SyteLine ERP 7, but it is also available for MAPICS ERP for iSeries.

The utility is available at **c:\Program Files\Frontstep\Tools\MqueueMessageRead.exe**.

Synchronizing Order Status Table Utility

This utility synchronizes order status data. There are two "key" tables that store key information about each order for Order Status. This key information displays on the order status screen (in a list view). When a user clicks on the order, the system queries the database to read the entire order. Sometimes these "key" tables get out of sync with the regular order status tables. This utility can be run to list the discrepancies and allow the user to atomically synchronize order status data between the tables.

This utility is available at **c:\Program Files\Frontstep\Tools\OSRecUtility.exe**.

Database Table Cleanup Utility

This utility deletes data in the following tables: MessageAuditLog, Referrals, and Web Sessions. This data loses its value over time, and much of this data just takes up space. It allows you to delete data based on a few different ranges.

This utility is available at **c:\Program Files\Frontstep\Tools\DBDelete.exe**.

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