The Apache Open for Business Project

# Apache OFBiz E-Business Solutions

Implement a robust E-Business system in your organization by using OFBiz

This Book will cover OFBiz 9.04


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# Preface

# What is Apache OFBiz?

The Apache Open For Business Project is an open source enterprise automation software project licensed under the Apache License Version 2.0. By open source enterprise automation we mean: Open Source ERP, Open Source CRM, Open Source E-Business / E-Commerce, Open Source SCM, Open Source MRP, Open Source CMMS/EAM, and so on.

Apache OFBiz is a foundation and starting point for reliable, secure and scalable enterprise solutions. Use it out-of-the-box (OOTB) or customize to suite even your most challenging business needs. With OFBiz in place, you can get started right away and then grow your operations as your business grows, without the huge deployment and maintenance costs of traditional enterprise automation systems.

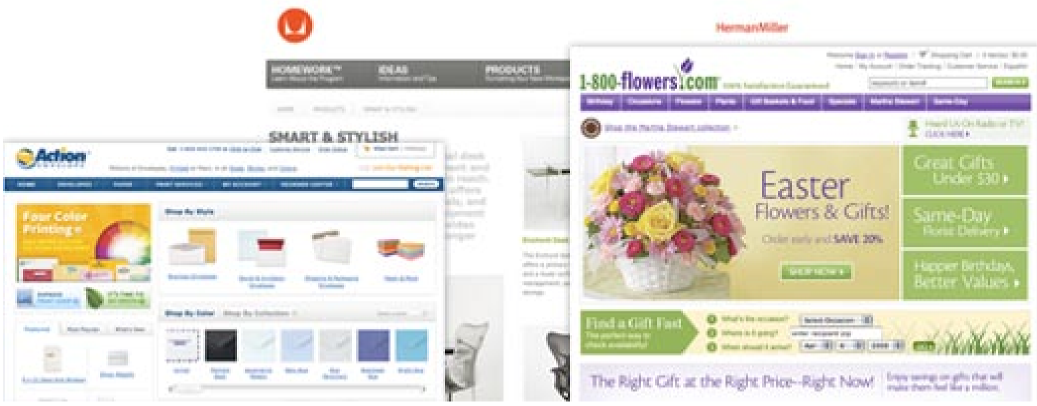
Being open source under the Apache 2.0 license and driven by a community Apache OFBiz offers both flexibility by design and by access to code, and a solution where you're not alone but rather can work with many others to get things done.

### Apache OFBiz offers a great deal of functionality, including:

- advanced e-commerce
- catalog management
- promotion & pricing management
- order management (sales & purchase)
- customer management (part of general party management)
- warehouse management
- fulfillment (auto stock moves, batched pick, pack & ship)
- accounting (invoice, payment & billing accounts, fixed assets)
- manufacturing management
- general work effort management (events, tasks, projects, requests, etc)
- content management (for product content, web sites, general content, blogging, forums, etc)
- a maturing Point Of Sales (POS) module using XUI as rich client interface
- and much more all in an open source package!

# The best things in life are FREE.

Apache Open For Business (OFBiz) is a community-driven open source project. That means, no licensing fees. For many, OFBiz is also the best e-commerce and enterprise resource planning (ERP) software available.



# OFBiz feature summary

This began as a summary of changes since Release 4.0. Needs all features listed, so people know what is available.

Apache OFBiz offers a great deal of functionality, including:

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- warehouse management
- fulfillment (auto stock moves, batched pick, pack & ship)
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- manufacturing management
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## Accounting

- 
    - help screens for Invoice, Payment and billing accounts
    - create sales tax entries on an invoice without an order.
    - FinAccount(Bank Account) section -
        1. Added a **Deposit/Withdraw** facility for user to deposit/withdraw payments in the Bank.
        2. Added **deposit slip** facility to the Bank Account so that user can make a logical group of Payments for bulk deposit/withdraw
        3. User can create a new Payment from here and can directly associate to the current Bank Account
        4. Add a facility to **reconcile** a Bank Account by creating a new GlReconciliation record and assign bank transaction to that reconciliation id.
        5. Fixed the issues in Reconciliation of Gl Account
        6. Modify FinAccountTransaction entity and added a new field - statusId to it.
    - GlReconciliation entity - statusId.
        - AP - Invoice - **Purchase Invoice** - User can issue CHECK payment for incoming invoices for given bank account id.
        - AP - Invoice - **Commission Run** - This will search for Outgoing invoices for which any commission have to be paid and create commission invoices for selected invoices.

- AR - Payment - **Batch Payment** a new feature by which user can create a group of payments that can be used for reconciliation.

Reports

0. Inventory Valuation,
1. Income statements,
2. Comparative Income Statement,
3. Transaction Total,
4. Gl Account Trail Balance,
5. Monthly Trial Balance,
6. Cost Center (New)
7. For above reports also provide facility to different exports - PDF/CSV.
8. Now Above reports are showing consolidated balance of its ROLLUP party.

Payment Gateway in OFBiz - The name of that Gateway is **"Chase Orbital"**. Document for its use will be available soon.

Support of Authorize.net 3.1 and use the new Payment Gateway Config features.

Integration of RBS WorldPay Select Junior and support of new Payment Gateway Config features.

screens to see billing accounts and returns information under Fin. History tab in Party.

Manual Payment Gateway Transaction (manual transactions supported are : authorize, capture, credit, refund, release).

Support of CyberSource v5.0.2 and use the new Payment Gateway Config features.

Payment Gateway Configurations and use of it on Product Store Payment Settings.

PayPal is now using the new Payment Gateway Config.

PayflowPro is now using the new Payment Gateway Config and support API v4.31, v2 & v3 will be end of life from September 2009.

Payrol invoice/payment check. It is now possible to create a payrol invoice/payment and print the related itemized check

apply a payment on an invoice of another currency, removed the convertinvoice service.

timeentries on an invoice overview

CapturePaymentsByInvoice service doesn't return not optional parameter while processing multiple orders invoice

Updated Cybersource configuration and code; code changes are minor only changes for java 5 (unboxing and generics)

Save an Invoice as Invoice Template

setup multiple net days payment terms to agreements/orders/invoices (for example: "after 30 days pay the 50%, after 60 days pay the 40%, after 90 days pay the remaining 10%"); added screens to filter for invoices by due date of the payment terms (for example: "show past due date invoices").

# AssetMaint

- 
  - Conversion of bsh scripts to groovy
  - Asset Maintenance improvements
  - Fixed Asset Meter refactor

# Business Intelligence

- 

- Moved the bi component from specialpurpose to the framework folder
- component and framework for an integrated Business Intelligence application

## CRM

- 
  - **Surveys**
    - Implemented feature to allow to set default values for survey questions; response can be generated by setting values (via a map) in the wrapper before rendering
    - Implemented GEO and ENUMERATION types for Survey Questions; now ANY Geo Group or Enumeration Type can be listed as survey option lists
  - Implemented code to support pre-account email verification (verify email before account is created)

## Ecommerce

- 
  - First pass on updating the ecommerce style sheet
  - new profile and customer pages
  - one page checkout process feature

## Fixed Asset Maintenance

- 
  - Meter readings can be entered without creating a maintenance.
  - Automatic maintenance generation. If a product maintenance is based on meter readings, then maintenances will be created automatically when the meter reading crosses a threshold. If a product maintenance is based on time intervals, then maintenances will be created automatically when the time interval is passed.
  - party roles for maintenance worker, maintenance manager, and maintenance supplier (outside service).
  - Automatic assignment of parties to maintenance tasks.
  - Additional parties can be assigned to a maintenance task.

## Framework

- 
  - Label Manager in Webtools
  - solved all XSS issues
  - It's now possible lo login through CAS remotely
  - A tarpitting mechanism to protect pages from data thieves (with login/pwd on hand) has been introduced
  - BigDecimal completly replaced Double where relevant
  - Generics markup added to several Java classes.

- Refactored FlexibleStringExpander - less memory used.
- Copy usersettings from a template if not found for a certain user
- Enhancements to the Autocompleter integration with form widget dropdown
- Minilang's first-from-list operation now sets the field to null if the list is null or empty, previously the field was left unchanged

## Catalog

- 
  - Now Shipping Total adjustments can be applied using promotion. User can specify percentage discount on a specific shipping method. This may be used for free shipping if needed.

## Content

- 
  - Docbook documents and help screens now showing in the proper visual scheme.
  - Most if not all upload content screens now also allow to select existing content using the content navigator. This will enable the reuse of documents
  - The DocBooK document xml format http://www.docbook.org is now supported including the generation of an HTML version. This opens up the possibility to move all documents inside the ofbiz system and an integration with the help system. The internal documents can also be made visible without having to login. An example OFBiz document is available at the url: http://demo.ofbiz.org/cmssite/cms/APACHE_OFBIZ_HTML
  - The Help system is improved by adding the pospossibility to have help files internal in the OFBiz system.

## Ebay

- 
  - Implemented new calls in eBay - GetOrders & GetMyeBaySelling. Now we are able to import single transaction as well as and order that contains multiple transaction to OFBiz. Order having multiple transaction will remain as it is in OFBiz.
  - Provided option to import order & transaction from Single screen.
  - Moved values for ebay configuration from property file to new entity EbayConfig. Provided the GUI support to update configuration values.
  - Also new entity introduced EbayShippingMethod to support custom shipping method from eBay. Also provided GUI support. Included demo data for reference.
  - Code refactoring in eBay and did cleanup in old eBay single transaction search screen. Encouraged use of Generics in Ebay code.
  - More then one Product export to eBay was not working so fixed that issue.

## Ecommerce

- 
    - When inventory is found or returned for a Discontinued Item then update ProductCategoryMember so that this item is shown in front-end store.
    - event "setUserLoginFromEmail" that set userloginId from an email address. If user edit email address then set it as a new userLoginId and
      disabled date to far in the future for existing userLoginId. This is a feature available on new profile page.
    - convenient Ajax one page checkout option with 4 sub-sections
    - Manage Addresses feature in Ecommerce.
    - One Page Checkout page process improvements and bug fixing
    - Fix shipping options not coming on IE7 along with misc. UI fix

## Facility

- 
    - Introduction to "Weight Package Only" screen for the verified orders from Verify Pick process with support of UPS integration.
    - UPS integration enhancement for supporting shipping quote based on dimensions as well.

## Framework

- 
    - The selenium tests can now be run from the webtools application. An example is provided there.
    - Upgraded the seleniumXml sytem.
    - Selenium test tools to enable user interface testing both on-line and in batch.
    - With addition of JSONServiceMultiEventHandler multi forms can now invoke services via Ajax calls.
    - Security : security against XRSF has been enforced.
    - Support for the Unified Expression Language added to the framework.
    - CrossSubdomainSessionValve for Tomcat, allows a session cookie to be shared across multiple subdomains
    - Visual theme improvements.
    - Disabling the session valve for now, for some reason the browser stops storing the session cookie when domian=.localhost.
    - Some cleanup on artifacts on all components.
    - Allow to define NOT NULL Fields in database from Entities declarations. Useful when for instance setting/handling the DB from outside of OFBiz.
    - It's now possible to retrieve password directly from login screen
    - Temporal expression recurring event framework.
    - Temporal Expression UI artifacts.
    - Visual Themes framework.
    - Set the autoLoginCookie's domain to what is specified in url.properties.
    - Fixed the DateRange class so it will work properly when java.sql.Timestamp is used in its constructor.

- Implemented new integration with the Apache DBCP connection pool that is now the default connection pool manager in OFBiz (the old Minerva connection pool has been disabled by default)

## Google Base

- 
  - generated XML string support namespace specific tags.
  - Sample data for Google Base so anybody can use it in their custom projects.

## GoogleCheckout

- 
  - Broken code is fixed in OFBiz trunk to send the cart details to Google Checkout area.
  - Sending cart info using Java API is introduced. Then saving Order is done based on the Order Notification is comming from Google Checkout server.
  - Other things are Introduced new entities to provide the configurable option for user on the GUI.
  - Couple of things are handled from Order Notification api like update order info which includes cancel order, charge order.
  - Introduced the concept to send Flat Rate Ship estimate to google and very soon we should introduced Merchant calculated Option for sending Ship estimate.
  - Provided link on the Ecommerce facing so that end user knows that this feature exists in OFBiz.

## Human Resources

- 
  - Training management.

## Inventory

- 
  - screen to search (by product, date, type etc...) and display the inventory movements (inventory item details) with information about shipments, sales/purchase orders, returns, manufacturing orders, physical manual variances; there are three views of the movements: by inventory item, by product or by date.
  - export warehouse inventory report in CSV format

## LDAP

- 
  - This new special purpose component add LDAP functionalities to OFBiz

## Manufacturing

- 
    - status for non serialized items to the production run issuance routine
    - lot id in production runs

## Marketing

- 
    - two new reports in Marketing component. These reports are related to emails sent, bounced and opened, subscriptions and canceled for given time period.

## Mypage

- 
    - email templates

## MyPage, ProjectManager

- 
    - This component shows all information for a specific user such as personal email, project tasks assigned, timesheet and company events such as holidays, When a person has acces he can also edit the email of other users such as company email send to info@example.com
    - It is now possible to create a customer request from an incoming email
    - Creation of a project task from a customer request
    - Allow the customer to login to the backend system in mypage using OFBiz security system and showing the status of the customer requests.
    - Customer can now add new requests and update the priority of exiting requests.
    - Customer can also see and download his own invoices in his currency in pdf format
    - Many enhancements in receiving email into the system.
    - Last but not least: create an invoice from all hours reported per timesheet on not yet invoiced project tasks"

## MyPortal / PartyMgr

- 
    - System notes. It is now possible to notify the logged on user of any events which are important to him such as incoming email or tasks assigned to him.
      The last three messages are shown in the flat-grey scheme in the header. They are also shown in the mypage 'main' portal page. Can easily be extended to other system events.
      Using the firefox "update scanner' plugin at http://updatescanner.mozdev.org/en/index.html a user can be

notified of new events even if you is not logged in if this plugin will interrogate the url: https://localhost:8443/myportal/control/showPortlet?portalPortletId=SystemInfoNotes&USERNAME=admin&PASSWORD=ofbiz (adapt to your system) regularly

- System status. Also on the main portal page is a portlet of items which are 'open'. Examples are tasks which are assigned but not finished or incoming email which has not been dealt with. Also this can be extended to areas interested for the particular logged in user.
- day/week/month calendar. On the myportal main page is now a calendar where private or public events can be posted within the same portlet. Projectmanager tasks will also appear on this calendar
- A built in web email client has been completed for the receiving and sending of email. Further it is possible to edit other parties email if the relationship in the partyRelationShip entity is recorded. Emails can be converted into customer requests and assigned to tasks in a project and assigned to a project member all on one screen.
- The component is completed now, see http://docs.ofbiz.org/display/OFBENDUSER/My+Portal?decorator=printable

# Operating environment

- 
    - An effort to package to Debian is currently in progress and well advanced

# Order

- 
    - UPS integration support for sending Shipment Return Label email to customer. This option will be available on order detail screen and as well on return screen when order is in COMPLETED status and return is in ACCEPTED status respectively.
    - getting online shipping charges from UPS if an order is in approved status with associated shipment in PICKED status and it has been hold due to an overage in the shipping charges from Weight Package only screen.
    - After a return for refund, exchange order can be created against original order.
    - return type "Replace Immediately". This could be used with returns for which items are not expected to be returned and even item(s) cost less then the shipping charges.
    - filters on find order page. This filter is about finding orders ship to a country. This work along with the option "Include Only" and "Do Not Include". With the former option system will display only orders that are ship to the selected country and with latter it will display only order that are not shipped to the selected country.
    - feature to show/hide out of stock products on site. This new implementation is configurable through a new field showOutOfStockProducts (by default equal to Y) on ProductStore.
    - option to add a new shipping address from Order detail page.
    - generate pick sheet PDF for an order from Order Detail Page.
    - search filters on find order page. They are shipping method, order viewed and PaymentGatewayResponse - gatewayAvsResult, gatewayScoreResult.
    - feature to mark order as viewed.

- Introduced new return type "Wait Replacement Reserved" for returns of order, with this when return is accepted immediately create replacement order, in the "Held" status and when original item return is received HELD replacement order(s) auto-set the status to APPROVED to clear them for fulfillment.
- while placing purchase order, orderId can be supplied explicitly. If not supplied then it will be created automatically.
- "cancelBackOrderDate", like others for OrderItem(purchase order). Field is shown in order detail page and on Purchase order PDF if exists;   Also added scheduled service (midnight daily) which searches for purchase orders with Cancel Back Order Date and cancels order if the date is in past.
- add more than one product at a time to purchase order in order detail page with single add form.
- purchase order
- sales tax calculation
- Configurable products with Virtual product options
- returns of purchase orders to suppliers
- Store Order Items

# Party

- 
    - Geolocation added with demo data for parties, facilities, container (not much used in OFBiz yet) and fixed assets
    - Show party status and externalId on partyscreens, and popups only show parties which have the status party_enabled
    - Some improvements to the financial history screen.
    - Fix an issue with Upload CSV in "Address Match Map" Party menu (importAddressMatchMapCsv).
    - Enhanced the communication event screens and created specific forms for emails and internal notes.
    - Created the possibility to create Customer requests from incoming emails which allows the import into the project manager component where request can be converted into project tasks.
    - When emails come into the system and the email is not known, a form is added which allos the quick creation of new parties. Also has a mass delete button to delete incoming spam.
    - Make viewing own tasks possible in profile
    - Introduction of a sheduled job which is executed every 5 minutes and which send entered emails. This job also allows to send emails in the future
    - Converted Party Manager->View Profile->Subscriptions screenlet to form widget

# Payments with Credit Cards

- 
    - Completed implementation for security codes (ccv2) for credit cards in the order component

# POS

- 

- Client Profile screen (from Promo button in promo panel) allows you to search for all clients (all fields empty) or to focus on a client (at least one field filed) and edit his/her profile.
- You may select a client then his/her card id will be used as a promo code. The idea is to generate promo codes and to use them as card id when creating physical cards.
- A comment field for Paid In/Out.
- virtual keyboards (alphanum and num) automatically accessed from fields needing them (usefull with touch screens, can be disabled with a property)
- Actually the numeric keyboard makes more sense in Paid In and Out
- Use resource in UtilProperties.getMessage in place of file name hardcoded

# Product

- 
  - screen with Facility Tab: "Verify Pick" to allow user to verify a pick.
  - Packing screen improved to use verified orders from Verify Pick screen by using existing shipment and invoice created from "Verify Pick"
  - Facility-->Picking User can select options for preparing a group on the basis of Shipping method, Warehouse area and Number of order items (one to two, three or more). So that group of Orders are created according to selected options.
  - In picking screen after grouping orders per selected factors by the user functionality for printing pick sheet of group of orders, which will show detailed information of each order like shipping method, and number of order items in each order.
  - migrating FacilityRole to FacilityParty
  - Misc small enhancements to the Product Catalog "Inventory" screen
  - Inventory Item look up
  - Converted the FindProductConfigItems screen to use a form widget
  - status for non serialized items to the production run issuance routine
  - Add possibility for entering comments for configurable product options. The comments are attached to production runs as notes
  - uploading additional Product Views (images)
  - Problems in virtual product's detail page if productFeatureTypeId contain non alfa characters
  - Create a hyperlink from the contentId on the productContent form

# Projectmgr

- 
  - Survey Implementation for testing scenarios of ecommerce application. Sample data preparation, services & UI is done. In next phase improvement will be done using Prototype library.
  - First new version of a html only ganntchart because the old dojo chart did not work in firefox3
  - Make selection on email address more accurate and show completion button on mytask list
  - Re-generate an invoice from project
  - Timeregistration now possible with different rates
  - Template function created to enable the creation of new project from templates

- Project copy function added.
- GanttChart now available for phases and tasks.
- resource manager, resource assignment to project and tasks.
- Timesheet for one week for easy entry.
- Project and phases information now show planned and actual data from the lower levels
- demo data to be loaded with ant run-install

# Promotions

- 
  - Implemented validity dates for the ProductPromoCode entity: it is now possible to specify the validity period for a promotional code
  - Enhanced support for manual promotions (i.e. promotions that are associated to a store but are applied only if the order entry clerk explicitly selects them)

- **SFA** (Sales Force Application)
  - added the linking between companies and contact according the party manager principle.
  - add the function to assign an existing lead to a sales person.
  - pages for adding leads
  - sales opportunities

# Setup

- 
  - With this component you can start with a system only containing seed data. Then create an admin user and setup the system with this webapp, entering minimal information for the company, productstore, catalog, category and a first product. Enter also the first customer and you can create your first sales order entry, even the glaccounts will be loaded from a external file and the invoice will be properly generated. This can be done in less then 5 minutes.
  - To start of an empty system was never that easy. See the official ofbiz document for more info.

# Translation

- 
  - Now supports **Hindi** translation for Accounting, Common, Party components.
  - A Chinese translation was added to all components.

# User Interface

- 

- smoothfeather theme, still some issues to fix but very promising. BTW this style is also used for the main site and documentation
- You can now change the language used an stay on the page you where. This is working both in backend and eCommerce. It uses a new feature which allows to stay on a page (view-last) or/and to store a page to come back to it after (save-last-view)
- Most of harcoded labels have been internationalized
- More online help accessible (in accounting for instance)
- Thanks to the Labels Manager (WebTools) the French translation is now complete. It will be checked and updated monthly
- You can now define a Visual Theme for the eCommerce (see in Product/Store)
- Nearly complete labels l10n cleaning done
- "blue-light" theme with drop-down menus
- Beginning of amendments in Internationalisation area using specific tools (duplicates removed, sorting of labels by languages, etc.)
- Complete French translation of Human Res, all Special Purpose and Webtools components (we are near a complete French translation, but still some months of work I guess...)
- Complete French translation of Manufacturing component
- A Dashboard system based on portlets has been introduced in the framework and is now available in the Example application
- grouping fields in OFBiz Widgets has been introduced and used in Store main and "Shipping Estimates" pages
- Better French translations
- Better Italian translations
- Column sort feature for List and Multi forms
- Field-groups can now be collapsible and a field-group title can be shown
- Italian label translation for ecommerce
- Selectable Visual Themes can now be installed into OFBiz hot-deploy folder. Backoffice users can select their favourite Visual Theme.
- The page header is now collapsible so that more screen space is available.
  - Complete French translation of Facility, Project, Party and Asset Maint modules
- German translations for ordermgr module
- Better French translation.
- Additional german translations for framework
  - OFBiz now completly translated into the Thai Language.
  - Complete French translation of the eCommerce module
- Enhanced support for RTL (Right-To-Left) languages

# Web Pos

- 
  - Special purpose component for a pos web based application.
  - Changed some services to support BigDecimal
  - Add a new "terminalName" on PosTerminal entity and then show it on web pos login

## Work Effort

- 
    - iCalendar support. OFBiz can be used as an iCalendar server - enabling users to share calendar information using their iCalendar-aware client (Mozilla Sunbird, Apple iCal, Microsoft Outlook, Windows Vista Calendar, cell phone, PDA). Users can publish department calendars, project calendars, company vacation calendars, etc. They can check on the availability of a conference room, or find out when service is due on a fixed asset - right from their calendar client.
    - iCalendar support added to the Work Effort application. Work efforts can be "published" in iCalendar format.
    - availability (transparency) to party and fixed asset assignments
    - Temporal Expression support to Work Effort. Recurring work efforts appear in the calendar.

# Chapter 1: OFBiz Installation

1. Data To Gather for Setup
2. Technical Setup Process
    a. Tools Installation
    b. OFBiz Installation
    c. Database Setup
    d. Seed Data Loading
    e. OFBiz Configuration
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        vii. Currency, Locale Settings
        viii. Email Server Settings
        ix. Mounting a Root WebApp
    f. Running OFBiz
    g. Running OFBiz Automated Tests
    h. Performance Monitoring and Tuning
3. POS Setup Process

## Data To Gather for Setup

1. Technical Info
    a. Host/domain name to deploy on (and ports if not 80, 443)
    b. Web server setup: direct to Tomcat/Jetty, through Apache, using another (stand-alone) application server?
    c. Which database to use. Is the database installed on a remote server or installed locally ?

## Technical Setup Process

### Tools Installation

1. Check/install Java SDK (need 1.5 series full SDK, not just JRE)
2. Check/install SVN client

*Expert Recommendation: If you intend to only install a binary release version (do we have that?) of OFBiz you will not* *need the SVN client. But normally you would want to have the svn client in order to be able to upgrade easily.*

3. Check/install ant (1.6 or later)

## OFBiz Installation

1) If you intend to use a development version of OFBiz, follow the instructions on the Source Repository Info page(http://cwiki.apache.org/confluence/display/OFBADMIN/OFBiz+Source+Repository+and+Access) to checkout the latest code or your desired stable branch

2) Build using "ant" in the ofbiz home directory (the directory where you installed OFBiz)

## Database Setup

By default OFBiz includes and is configured for an embedded Java database called Derby. This database used to be called Cloudscape but was purchased by IBM, changed to be DB2 specification compliant, and then release as open source. This is a great database for demonstration, testing, development, and even small-scale production environments.

Expert Recommendation: We generally do not recommend the Derby database for production because it is not as easy to administer and optimize and will generally not perform as well as more substantial or native databases as Derby is a lighter weight Java database.

Expert Recommendation: There are many databases that OFBiz can use, both commercial and open source. While there are significant production instances of OFBiz running against Oracle, MS SQLServer, and so on, we generally recommend using an open source database such as Postgres or MySQL. The database to use is an important decision and may affect many things down the road. If you do not have a preferred database to use, we recommend discussing options with an experienced consultant before making a final decision.

1. If you decide not to use the embedded Derby database, check/install your database of choice
2. If necessary, put the correct JDBC driver in:
    a. ${ofbiz install dir}/framework/entity/lib/jdbc
    b. replacing the old or incorrect version of the driver there (ie copy in with same name to avoid problems with update restoring the old driver later)
3. To setup the Entity Engine to use a different database from the default Derby database.

In the: ${ofbiz install dir}/framework/entity/config/entityengine.xml file:

Modify an existing datasource (near the bottom of the file) or create a new one by copying one of the sample datasources already there and giving it a new unique name

1. If using the default OFBiz transaction manager and connection pool, update the data URI, username and password in the inline-jdbc tag
2. If you want your OFBiz tables in a special schema first create that schema in your database, then set the schema-name attribute on the datasource tag
3. Find the "default" delegator near the top of the file and change the datasource-name attribute value in the group-map tag under it to the name of the data source you modified or created.

Expert Recommendation: if you are using an external app server or want to setup more advanced Entity Engine configurations, see the Entity Engine Configuration Guide(http://ofbiz.apache.org/docs/entityconfig.html) or other online documentation. The training videos(http://docs.ofbiz.org/display/OFBTECH/Framework+Introduction+Videos+and+Diagrams) from Undersun Consulting are highly recommend if you get into more advanced usage of OFBiz.

## Initial Data Loading

To load the initial data just use the OFBiz install routine through ant or directly with Java and the ofbiz.jar executable JAR file. By default the install routine will load the "seed" and "demo" sets of data files, as defined in the entityengine.xml file and in the ofbiz-component.xml file in each component. Run one of these two options from the command line in the ofbiz home directory to run the default install routine:

```
ofbiz$ ant run-install
```

or

```
ofbiz$ java -jar ofbiz.jar -install
```

help can be obtained by by the following commands:

```
ofbiz$ java -jar ofbiz.jar -help
```

or

```
ofbiz$ java -jar ofbiz.jar -install -help
```

Note that you can choose to only load the basic "seed" data and not load the "demo" set of data files. To do this run something like:

```
ofbiz$ java -jar ofbiz.jar -install -readers=seed,seed-initial
```

*Definition: **Seed Data** is data that an application requires in order to run. It is created and maintained along with the code and should be loaded into the database when the code is updated. It should not be changed or removed in the application database without first having done so in the Seed Data XML files. In OFBiz these are the source of the Seed Data and they are maintained in the code repository along with the code. Add in components should do the same for this sort of data.*

*Definition: **Seed Initial Data** is data that is only required the first time the system is loaded like the password of the admin user. Later if you want to update the seed data, you normally do not want the password of admin set back to the 'ofbiz' value.*

*Expert Recommendation: For smaller installations we recommend loading the demo data and modifying it through the OFBiz applications rather than creating all of the data from scratch.*

For larger installations we recommend creating data files with your own settings, copied from the demo data, or simply creating all data from scratch. These can be added to the "ext" set of install data files, which is done by referencing those files in an ofbiz-component.xml file entity-resource tag with the attribute reader-name="ext". To load the "seed" and "ext" groups run something like:

```
ofbiz$ java -jar ofbiz.jar -install -readers=seed,ext
```

or the special ant target:

```
ofbiz$ ant run-install-extseed
```

The OFBiz demo data includes a Party with ID "admin" and it has a number of UserLogin accounts associated with it that have varying permissions. Note the following configuration changes:
1. For production systems the passwords on all UserLogin accounts associated with the "admin" party should be changed from their default values.
2. The default password for the "admin" userLoginId is "ofbiz", as it is for the "flexadmin" and "demoadmin" accounts. The "1" account is meant to be used with the POS system so the new password should include only numbers to make it easier to use with the POS client.

Expert Recommendation: while the "admin" party is the most critical to make sure the passwords are changed for, there are other parties you should check, and change the password for all User Login accounts associated with these parties. This includes "ltdadmin" and "externaluser" and if the demo data is loaded (done by default) then also the users "DemoBuyer", "DemoRepAll", and "DemoRepStore".

## OFBiz Configuration

### Cache Settings

${ofbiz insall dir}/framework/base/config/cache.properties

Fresh from SVN, this file is configured to be development friendly to reload resources frequently. For production use the expire times for the caches in the last section of the file should all be commented out by putting a pound sign "#" at the beginning of each line. The properties in question start with "minilang.", "script.", "webapp.", "widget." And "template.".

### Debug Settings

${ofbiz install dir}/framework/base/config/debug.properties

This file is used to enable/disable different logging levels and used to configure Log4J logging level and output settings. For most production use it can stay as-is. Disabling the "info" and "timing" level properties can save some resources on the server, but we recommend leaving all of the others enabled. To do this just change the values of the "print.info" and "print.timing" properties to anything except "true".

### Security Settings

${ofbiz install dir}/framework/security/config/security.properties

There are various settings you might want to configure in this file, but for most production use it can remain unchanged.

If you want to use LDAP for user authentication:

- Set the security.ldap.enable property to true.
- Using the ${ofbiz install dir}/framework/security/config/jndiLdap.properties file:
  - Change the java.naming.provider.url property to point to your LDAP server.
  - Change the ldap.dn.template to use the Distinguished Name appropriate for your LDAP installation.

If your LDAP installation is simple (all of your users are in a single organization unit) then these are all the changes needed. If your users are in more than one organizational unit, then you will need to set up each user's distinguished name using the Party Manager View Profile -> Update UserLogin Security Settings screen.

By default, OFBiz will authenticate the user to LDAP first, and if successful it will synchronize the user's OFBiz password to the user's LDAP password, and then proceed to authenticate the user to OFBiz (using OFBiz's internal permissions logic). If LDAP authentication is unsuccessful, the user is still authenticated to OFBiz. This is the behavior appropriate for most installations.

If you want the entire authentication process to fail if LDAP authentication fails, then set the security.ldap.fail.login property in ${ofbiz install dir}/framework/security/config/security.properties to true. Only users who are in the LDAP directory will be able to use OFBiz. This would be appropriate for installations that use only the back office (manager) applications.

### URL and Port Settings

The following configuration files contain port configuration that may configured for custom OFBiz installations:

- ${ofbiz install dir}/framework/base/config/ofbiz-containers.xml (The Containers Configuration File)
  Sometimes other container configuration files are used, but are generally in that same directory and will be specified in the start properties file used (see start.properties, pos.properties, install.properties, etc)
  The integration with Shark in OFBiz is still not complete, so we recommend disabling Shark. So, the Shark container configuration near the beginning of the file should be commented out.
  The BSH client (the last container in the file) should generally be disabled or at least protected by a firewall for production deployments. Otherwise this is a significant security risk.
  Note that if an external application server is used instead of the embedded Tomcat or Jetty servers then many things normally configured here will be configured in the setup files for the external application server.
- ${ofbiz install dir}/framework/webapp/config/url.properties (The URL Properties File)
  These properties are used to configure the settings to send to the client browser. The port and host settings may be different than the port and host settings of the local machine if it is running through Apache through AJP, through any proxy, or through a load balancer of any sort. The settings in this file should be set to what the client browser will see when communicating with your system.
  Note that the settings in this file can be overridden on the WebSite record with the ID specified by the webSiteId field in the web.xml file in each webapp, if applicable. These can be viewed and modified in the WebSites tab of the Content Manager application.
- ${ofbiz install dir}/framework/base/config/jndiservers.xml (JNDI Servers XML File)
  Generally only the "default" server is used which has automatic configuration through the Java standard JNDI facility, so no changes are needed for most production deployments in this file.
- ${ofbiz install dir}/framework/base/config/jndi.properties (JNDI Properties file)
  This is a standard Java JNDI configuration properties file and is used to configure the local JNDI server to be used. Note that this is how the "default" JNDI server in the JNDI Servers XML File is configured. If this file is not present the Java standard JNDI classes will use various defaults instead.
- ${ofbiz install dir}/framework/service/config/serviceengine.xml (Service Engine XML file)
  Most of the settings in this file can remain unchanged for production deployments, but there are some default server locations that refer to port 1099 (JRMP, for RMI) and 8080 (HTTP). These are in the "service-location" tags in the file.
- ${ofbiz install dir}/framework/jotm/config/iiop.properties (or jrmp.properties) (Carol IIOP or JRMP Only Properities)(**This is no longer needed**)

The default transaction manager in OFBiz is called JOTM and it includes a remote communication container called Carol that implements various standard protocols.
There are two configuration files here as examples of two different ways of configuring Carol in JOTM. The iiop.properties file sets up the IIOP and the JRMP protocols, while the jrmp.properties file only sets up the JRMP protocols. The properties file to use for Carol in JOTM is specified in the ofbiz-containers.xml file, or whichever containers XML file you are using, in the "jndi-config" property of the "jotm-container" container.
The only part of OFBiz that uses the IIOP protocol is that Shark workflow engine. The integration with Shark in OFBiz is still not complete, so we recommend disabling Shark and turning off IIOP. To do this change the jndi-config property in the jotm-container container in the ofbiz-containers.xml (or other containers XML) file from iiop.properties to jrmp.properties.

- ${ofbiz install dir}/framework/webapp/config/fop.xconf (FOP configuration file)
  the default settings in this file can remain unchanged for production deployments, but you may need to change the "base" element (the default value is "http://localhost:8080") to point to the modified base url (it is used by FOP to resolve relative paths, e.g. to images) .

### Widgets setting

${ofbiz install dir}/framework/widget/config/widget.properties

- To ease development (Out Of The Box, OFBiz is configured in development mode) the compressHTML properties in general.properties if OFF. If you prefer to strip unnecessary whitespace from HTML output you can set it on ON (uncomment the line "#compress.HTML=true"). Note that, it is NOT the same thing as gzipped HTTP 1.1 compression.
- For the same reason (development mode) the line "widget.verbose=true" is uncommented. If you do not want to see any informations about widget boundaries in the generated HTLM code, you should comment this line.

### Ports, Default Values

- HTTP - 8080
  Configured in: ofbiz-containers XML File
  Referenced in: Service Engine XML File, Client Browser (if running direct), URL Properties File
- HTTPS - 8443
  Configured in: ofbiz-containers XML File
  Referenced in: Client Browser (if running direct)
- AJP13 - 8009
  Configured in: ofbiz-containers XML File
  Referenced in: Apache mod_jk plugin configuration
- JRMP (JNDI, RMI, etc) - 1099
  Configured in: Carol Properties (carol.jrmp.url)
  Referenced in: Containers XML File, JNDI Properties File, Service Engine XML File
- IIOP (Shark, etc) - 2000
  Configured in: Carol Properties (carol.iiop.url)
  Referenced in: ofbiz-containers XML File
- BSH Client - 9989, 9990 (this should generally be disabled or at least protected by a firewall)
  Configured in: ofbiz-containers XML File

## SSL Certificate Setup

Choose a password to enter later when prompted. This same password will be used for the keystore password and for another question a bit later as the key password for.

1. Run: "keytool -genkey -keyalg RSA -alias ssl -keystore [keystore name]"
Go through and answer the following questions:
Enter keystore password: [password]

What is your first and last name?
[Unknown]: www.mydomain.com (example)

What is the name of your organizational unit?
[Unknown]: Undersun Testing (example)

What is the name of your organization?
[Unknown]: Undersun Testing (example)

What is the name of your City or Locality?
[Unknown]: New York (example)

What is the name of your State or Province?
[Unknown]: New York (example)

What is the two-letter country code for this unit?
[Unknown]: US (example)

Is CN=www.mydomain.com, OU=Undersun Testing, O=Undersun Testing, L=New York, ST=New York, C=US correct?
[no]: yes

Enter key password for
(RETURN if same as keystore password): [password]

2. Run: "keytool -certreq -alias ssl -keyalg RSA -file certreq.csr -keystore [keystore name]"

The following will be prompted/shown:
Enter keystore password: [password]

The CSR will be saved in the current directory: BEGIN NEW CERTIFICATE REQUEST and END NEW CERTIFICATE REQUEST

3. Submit the CSR to a signing authority (Thawte, Verisign, etc)

4. Download your certificate from the signing authority. Please remember to download the Certificate in PKCS#7 format

5. Import the Certificate into the keystore by running:
"keytool -import -alias ssl -trustcacerts -file mysignedcert.cer -keystore [keystore name]"

6. Configure the ofbiz-containers.xml file to point to your new keystore and password:

- If using Tomcat (Catalina), which is the default, find the "catalina-container" -> "https-connector" -> "keystore" and "password" properties and set them.
- If using Jetty find the "jetty-container" -> "https-listener" -> "keystore" and "password" properties and set them.

- For other Servlet containers, see the documentation for that container to find out how to set the HTTPS keystore and password settings.

### Currency, Locale, Time Zone Settings

Currency settings may be configured in the following configuration file:

${ofbiz install dir}/framework/common/config/general.properties

- Default Currency Code (must exist in Uom table, three letter code, see seed data in the CurrencyData.xml file): currency.uom.id.default=USD
- Default Country Code (must exist in Geo table, is three letter ISO country code, see seed data in the GeoData.xml file): country.geo.id.default=USA
- Note that these settings can be overridden for a Store in the Edit Product Store page.

You can constrain the available locale using locales.available.
For instance

```
# -- locales made available separated by comma's
locales.available=en,fr,de,it,nl,es,ja,zh
```

The default locale and time zone are configured in the following file:

${ofbiz install dir}/framework/start/src/org/ofbiz/base/start/start.properties

- Default Locale: ofbiz.locale.default
- Default Time Zone: ofbiz.timeZone.default

### Email Server Settings

e-mail settings may be configured in the following, OFBiz file:

${ofbiz install dir}/framework/common/config/general.properties

- SMTP Server (relay host): mail.smtp.relay.host
- SMTP Username (if needed): mail.smtp.auth.user
- SMTP Password (if needed): mail.smtp.auth.password
- Turn on email notifications by setting the mail.notifications.enabled property to "Y".

If you are having trouble getting OFBiz to connect to your mail server, try disabling your anti-virus software (temporarily) as it may block attempts to send emails from unknown apps because it thinks they are being sent by a virus.

### Mounting a Root WebApp

It is often desirable to have one of the webapps mounted on the root. This is often either the ecommerce webapp or your own web site, which is created as a webapp in an OFBiz component would be setup the same way.

1. To set the mount point to root (or "/") for a webapp, find the corresponding "webapp" tag in the appropriate ofbiz-component.xml file and change the "mount-point" attribute on that tag to equal "/".
2. For the default OFBiz ecommerce webapp, this is found in the file:

${ofbiz install dir}/applications/ecommerce/ofbiz-component.xml

## Running OFBiz

There are various ways to run OFBiz, and they all come down to some variation of the executing the "ofbiz.jar" executable JAR file. On the command line this can be as simple as:

```
ofbiz$ java -jar ofbiz.jar
```

or through ant:

```
ofbiz$ ant run
```

Then to access the application from your browser follow advices in Demo and Test Setup Guide
For production use you will want to setup a start script that contains special settings for things like memory heap size, and so on. There are example start and stop scripts in the root ofbiz directory in the startofbiz.sh and stopofbiz.sh files.
Expert Recommendation: Instead of running the startup and shutdown scripts manually it might be a good idea to set them up as services on the system, or use something like daemontools to make sure the process is restarted automatically if it goes down for some reason.

## Running OFBiz Automated Tests

Each component running in OFBiz can have its own set of tests. These are usually defined in the "testdef" directory in each component, and the test set XML files are specified in the ofbiz-component.xml file for each component.

To run all automated tests use the following command:

```
ofbiz$ java -jar ofbiz.jar -test
```

To run just the tests for one component run something like (for the entity component):

```
ofbiz$ java -jar ofbiz.jar -test -component=entity
```

## Performance Monitoring and Tuning

Expert Recommendation: While some steps can be taken at this point in the configuration process, the real performance testing and tuning should be done after you have setup your catalog, categories and products, and after you have customized any templates you plan to.

As mentioned above a critical part of performance tuning is turning off the expire times in the cache.properties by commenting out the lines near the bottom of that file that set those values.

### General Cache Information

You can get a lot of good information on database and configuration file (XML, properties, etc) performance by looking at the statistics in the cache management page in Web Tools. They are all listed there with statistics about hits and misses, and about why cache misses happened.

There are three causes for cache misses:

1. Not Found
2. Soft Reference clearing (is done during garbage collection)

3. Expire Time reached for an entry in the cache

### Memory Settings

If you are running into problems with Soft References (as seen on the cache management page in WebTools), the case is generally that your heap memory settings are less than ideal. Every time Java does a memory allocation and finds it needs to grow the heap size it first does a garbage collection and clears out soft references. The Entity Engine caches all use Soft References to avoid overrunning memory with cached database data.

In other words, you may have 2Gb of memory on the box, but you are probably only starting with 64Mb (or even less) and have a max heap of 128Mb. These are done with the following java command line arguments: -Xms64M for the low size, and -Xmx128M for the max size. We usually recommend a max heap size of around 75% of the memory on the box, but that depends on the operating system of course... The small size should be pretty high, perhaps even as high as the max, to avoid the caches being cannibalized during allocations and garbage collections as described above.

Database Intensive Operations
The comments above on memory settings, caches, etc. are for category browsing pages and such where just about everything should be cached. For db intensive operations, like the product searching, it's much better to focus on how the db is doing with the queries.

# POS Setup Process

The Point-Of-Sale (POS) component in OFBiz is still maturing, but is already a very flexible and capable enterprise class POS solution that features:

- templated receipts
- XML file configurable screens
- jPOS hardware support
- multi-tiered synchronization of product, price, promotion, party, order, and other data related to POS deployment and operation

The POS system is designed to run with its own database in a totally stand-alone mode. This was done so that even if the machine is totally cutoff from the network it can still operate. But it may used with a shared database, for instance if you want to run a webstore simultaneously using the same stock. You may even use the same machine to run both (ERP&eCommerce + POS) using the -both paramerer, see below.

To run OFBiz in the POS "mode" just run:

```
java -jar ofbiz.jar -pos
```

or, at least on Windows for now startofbizPos. Note that this uses the pos-containers.xml file instead of the ofbiz-containers.xml file and by default it doesn't load a web container (Tomcat by default), but you may also run the command below which uses the both-containers.xml allowing to run the POS concurrently with Web eCommerce and Back Office.

```
java -jar ofbiz.jar -both
```

or, at least on Windows for now startofbizBoth.

The Store for the POS needs slightly different settings than for a web store. There is an example POS Store in the demo data. One of the differences to note is that the POS Store should always have the Is Immediately Fulfilled field set to Y, whereas for an online store or other mail or phone or store it should be set to N. The POS Store should also have Manual Auth Is Capture set to Y, and typically Check Inventory and Require Inventory should be set to N.

There are many files under the specialpurpose/pos directory that you may want to customize as you set it up.

- The receipt templates are .txt files in the config directory there.
- The screens are configured through XUI in various files under the screens/default directory. There is a default set for 1024x768 screen (in default directory), and a 800x600 preset. To use 800x600, you must modify 3 properties in xpos.properties : StartClass, ClientWidth and ClientHeight, but don't touch the other parameters...
- Button events are configured in the config/buttonevents.xml file.
- The POS is translatable, see the config directory and for more the OFBiz-POS page

You may want to change some default options following your needs.

- In the parameters.properties file
    - By default the POS use a virtual alphanum keyboard and a virtual numeric pad. If you prefer to use a real keyboard, change the ShowKeyboardInSaveSale parameter. You may even swap dynamically back and forth from the Admin Panel using "Virtual" button. But then the parameter will not persist.
    - There is a related special parameter SwipWithCard which is, for now, used only to swip card numbers using an MSR in the Client Profile dialog box (Promo Panel, Client Profile button). There are also sentinels parameters for setting MSR types.
    - If you use an external system for credit cards payments, you may find convenient the PosRefNum parameter wich allows you to not enter payments references
- In pos-containers.xml and both-containers.xml (depending if you use one or the other)
    - xui-session-id : the POS terminal identifier (used during synchronisation for instance)
    - facility-id : related to the name you set for your facility in ERP side
    - look-and-feel : see http://www.jgoodies.com/
- In xui.properties (in framework/guiapp/config)
    - # isSameLogin : if equals "true" (false by default), a logged off user (blocked, time out, ...) can only log in with the same login/pwd couple.
- There are also some technicals barcode scanning related parameters in jpos.properties

The localisation is done dynamically using the platform default. But it needs a 1st launch to be set (it dynamically changes the XUI's xpos.properties file). So in order to switch from a lanquage to an other you have to load the POS 2 times. It also takes care of possible font issues. But for now only for Chinese (it uses posstyles_zh.xml).
You may override this behavior (for instance to test) using

1. The languageSuffix parameter in the xui.properties file. This has an influence on the labels from XuiLabels.properties files.
2. Forcing the JVM language using "-Duser.language=zh -Duser.country=CN" from the command line. This has an influence on the labels from PosUiLabels.xml file.

There are example synchronization settings in the data/PosSyncSettings.xml file, which is just an Entity Engine seed data file that gets loaded into the database. This example is for 3 tiers: a Main Central Server (MCS), a Per-Store Server (PSS) and the Point-Of-Sale client (POS). There are example sync settings to do 4 data moves including MCS -> PSS, PSS -> POS, POS -> PSS, and PSS -> MCS. This uses the Entity Synchronization service in the Entity Engine and the XML import file for this has pretty good comments about what does what. Note that the services shown in the example are configured to use the location "entity-sync-rmi" which is a pre-defined location specified in the serviceengine.xml file. Note that to help avoid duplication of sequenced IDs in the data that is synchronized up the chain from the POS terminals a unique prefix should be setup for the Entity Engine using the sequenced-id-prefix attribute of the delegator element in the entityengine.xml file.

Note that OOTB the login/pwd are 1/1 (or 2/2 for a non manager person) and you must open the register before being able to play with the POS. To open the register click on the MGR button on the top and near the right, and then on the "Open" button on the right side of the screen near the top.

If you need to do some JavaPOS settings you may find this page interesting http://docs.ofbiz.org/x/0AM

If you need more informations see the OFBiz-POS page

## How to setup the Epson JavaPOS ?

Setup the Epson JavaPOS

## Areas for thought/investigation

For UK receipts the VAT needs to be shown as the amount made up in the gross price. The system can handle multiple VAT codes/values i.e. books have 0% VAT and books with tapes have 13% and pretty much everything else has 17.5%. The till functions correctly in applying the different amounts when the data is configured but need to look into the receipt reporting as we need a sub total listing the amounts for each VAT code separately. Plus if we store gross amounts then the VAT should not be added, just show how much it is! Ray Barlow 25/05/05

---

Individual stores require control of "their" product database in terms of store X can add and sell a product that store Y doesn't. Also store X should be able to add and sell a product that store Y might take on later, so the product data should also be transferable if desired. Again individual stores require control of pricing for a product although it will be standard for 95% of products. Ditto promotions!

Price enquiries - A quick (bar)code price check that does not make any changes to or need an existing transaction.

Find products by code, name and or descriptions!

---

Ray Barlow 13/07/05 Attached is the document we have written for users of the POS system (Till Manual_V2.0). It may be a little bit specific to us in areas and it does have a little customisation i.e. we have added two functional buttons that we thought useful, you can see them on the screenshots.
1) DEL : If you are typing a number on screen and you make a typo this saves pulling the keyboard out to correct it.
2) - (minus) : We use this for quantity corrections, price mods etc.

# Chapter 2: OFBiz Business Setup


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3. General Terms and Information
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    e. Catalog, Category, Product Setup
        i. Catalog Setup
        ii. Category Setup
        iii. Product Setup
            1. Add Content to the New Product
            2. Add Prices to the Product
    f. Accounting Organization and Setup Process

g. Marketing introduction

# Purpose and Goal of This Document

In addition to being an excellent development framework and platform for enterprise information automation, OFBiz also features many great applications that can be used out of the box without a lot of customization. However, since it is enterprise class software, there are a lot of configuration options, settings, and data structures that require some level of familiarity.

The purpose of this document is to help you get OFBiz setup for production use, with an emphasis on eCommerce deployments. This is not meant to be a complete discussion of issues or decisions to make or options to configure, just an overview of the basic settings that need to be configured for a production instance of OFBiz.

This document is meant to be a series of instructions to be followed in order, except where a part of the document says otherwise (there are very few). Of course, if you feel comfortable with the topics discussed here you can use it as a reference and not follow it as a list of instructions.

NOTE: We recommend that you read this entire document before starting the process or making any changes. While you are reading it is helpful to look at the files and web pages in question so you can visualize better where things go and what they look like. Naturally you can ignore this, but a half hour studying this document could save you a lot of time late

Note on Typographic Conventions Used in This Document

Text enclosed in a square box such as [[ ]] represents an OFBiz application browser tab selection.

Throughout the document the author has provided expert advice or other observations. These notations are indicated as follows:

Expert Recommendations: Here is some text you better pay attention to!

A notation used throughout this document to indicate the starting directory (or root) location for the OFBiz installation is \${ofbiz install dir}. This is typically followed by the path name location of the file or directory being discussed.

Where OFBiz application manager web tools have individual page name or table name titles, the page names and titles are highlighted with a background color: This Is A Page

# Data To Gather for Setup

1. Company Party (Party Manager -> Find -> Profile; partyId: Company)
    a. Name
    b. Customer Service
        i. Telephone Number
        ii. Email Address
        iii. Correspondence Postal Address
2. Warehouse Facilities (Facility Manager -> Facilities -> Facility)
    a. Title for each (ie Web Store Warehouse, or California Warehouse, or Burbank Distribution Center)
    b. Telephone Number

    c. Shipping & Receiving Postal Addresses (with names)
3. Email Settings (general.properties)
    a. SMTP Server (relay host)
    b. SMTP Username (if needed)
    c. SMTP Password (if needed)

# General Terms and Information

## OFBiz "Manager" Applications

OFBiz provides a number of Manager applications, which make up the "back office" functions of the suite. These applications are not intended to be customer or public facing, but rather tools to be used to administer and manage the OFBiz software. Manager applications are, by default, accessible using standard URL addressing and built-in OFBiz security services.

Manager applications which will be referenced in this document include the:
"Catalog Manager" accessed at:

```
http://localhost:8080/catalog/control/main
```

"Party Manager" accessed at:

```
http://localhost:8080/partymgr/control/main
```

More technical web based tools, or tools for the OFBiz framework are available in the "Web Tools" application: http://localhost:8080/webtools/control/main

Note: OFBiz will automatically make adjustments between non-secure and secure pages based on login requirements. Therefore, you can use the http (non-secure) notation to access the above mentioned manager applications when first attempting to access them.

Once you are logged in to any of the OFBiz Manager Applications, tabs across the top will be in place to allow you to easily switch from one application to another, or to open them in a separate window or browser tab.

## Other OFBiz Terms

In OFBiz a "Party" refers to a single entity such as a human being or a company or a family or even a group of friends. In other words, it can represent an individual (a Person) or a group of parties, including individuals and other groups (a Party Group).

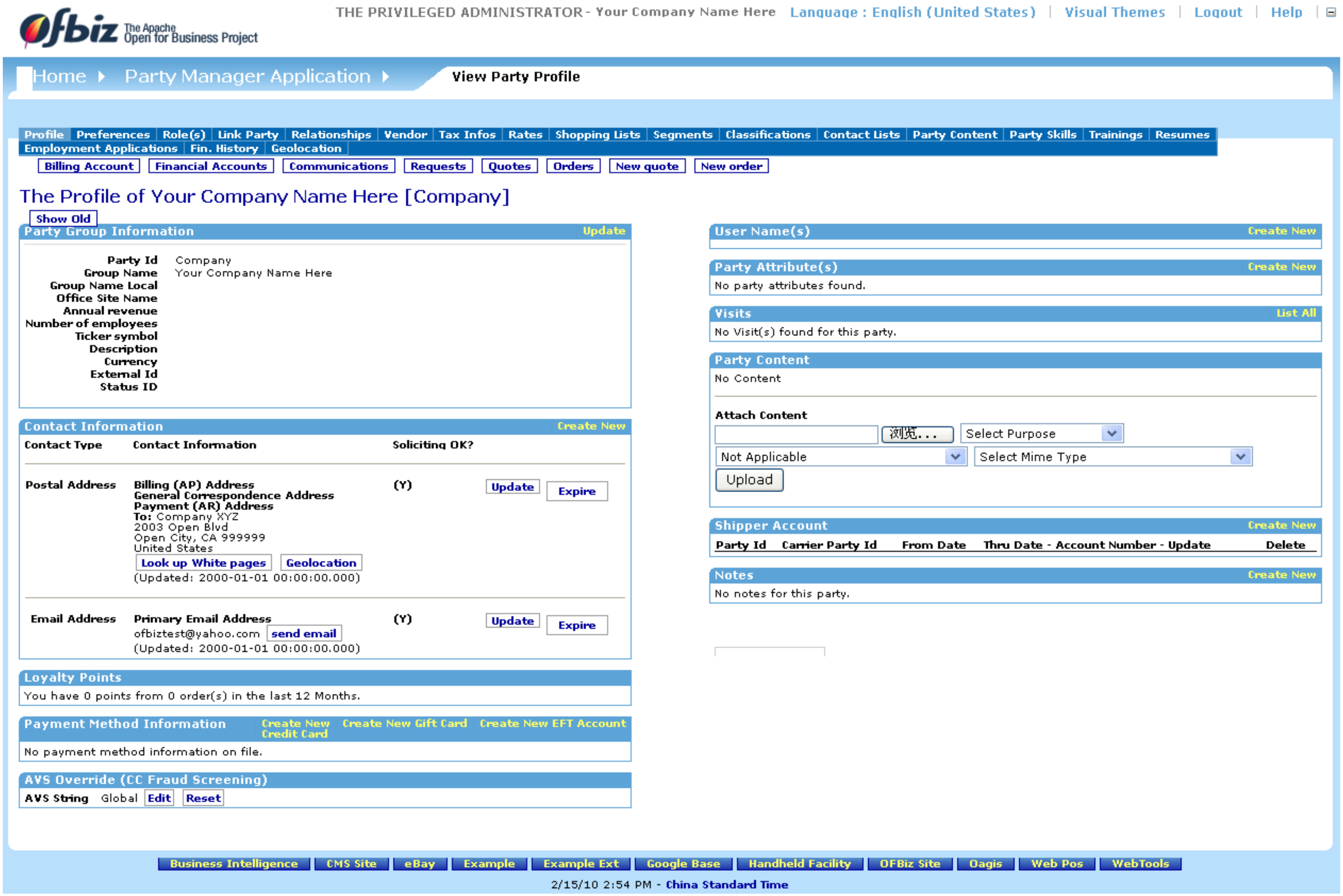
The "Entity Engine" refers to the embedded OFBiz database access engine. Likewise there are other "engines" in OFBiz including the Service Engine which is another critical tool that is the foundation of the service oriented architecture for logic and processes in OFBiz.

# Business Setup Process

## General Company Setup

There is a Party with the ID "Company" that is configured as the default Party that represents the company that owns or is running the system. You can have multiple organizations configured in the system, but this one is referred to be default in the Demo Product Store (which we will be modifying and not replacing in a minute).

https://localhost:8443/partymgr/control/viewprofile?partyId=Company




## Company Contact Information

In the Party Manager "Find" page type in "Company" in the Party ID field and press enter. This will bring up the View Profile page for the Party.

On this screen change the existing address which represents the "Billing (AP) Address", "Payment (AR) Address", and "General Correspondence Address". Note that if desired you can remove purpose(s) from this address and create other addresses for those purposes.

You should also setup any telephone numbers and email addresses you want for your Company.

## Facility (Warehouse) Setup

There is a Facility with the ID "WebStoreWarehouse" that we will be modifying in this step. This is the default fulfillment facility for the Demo Store (which we will be modifying and not replacing soon). You can create other Facilities here, but for this basic setup we will keep the single warehouse configuration and modify this warehouse in place.

In the Facilities List in the Facility Manager click on the "Web Store Warehouse" link, and for that facility click on the "ContactMechs" tab/button.
There is already an address setup that is a Shipping Destination Address and a Shipping Origin Address. To setup your Facility's address just "Update" this address.
There is already a phone number setup that is a Shipping Destination Phone Number and a Shipping Origin Phone Number. To setup your Facility's phone number just "Update" this phone number.

There are various other things that can be setup here including more advanced options such as Facility Locations for inventory, and so on. This is also where you can go to manage picking/packing and shipping of orders, and the receiving of returns, purchase orders, and so on.

https://localhost:8443/facility/control/FindFacility


Click Submit


## WebSite Setup

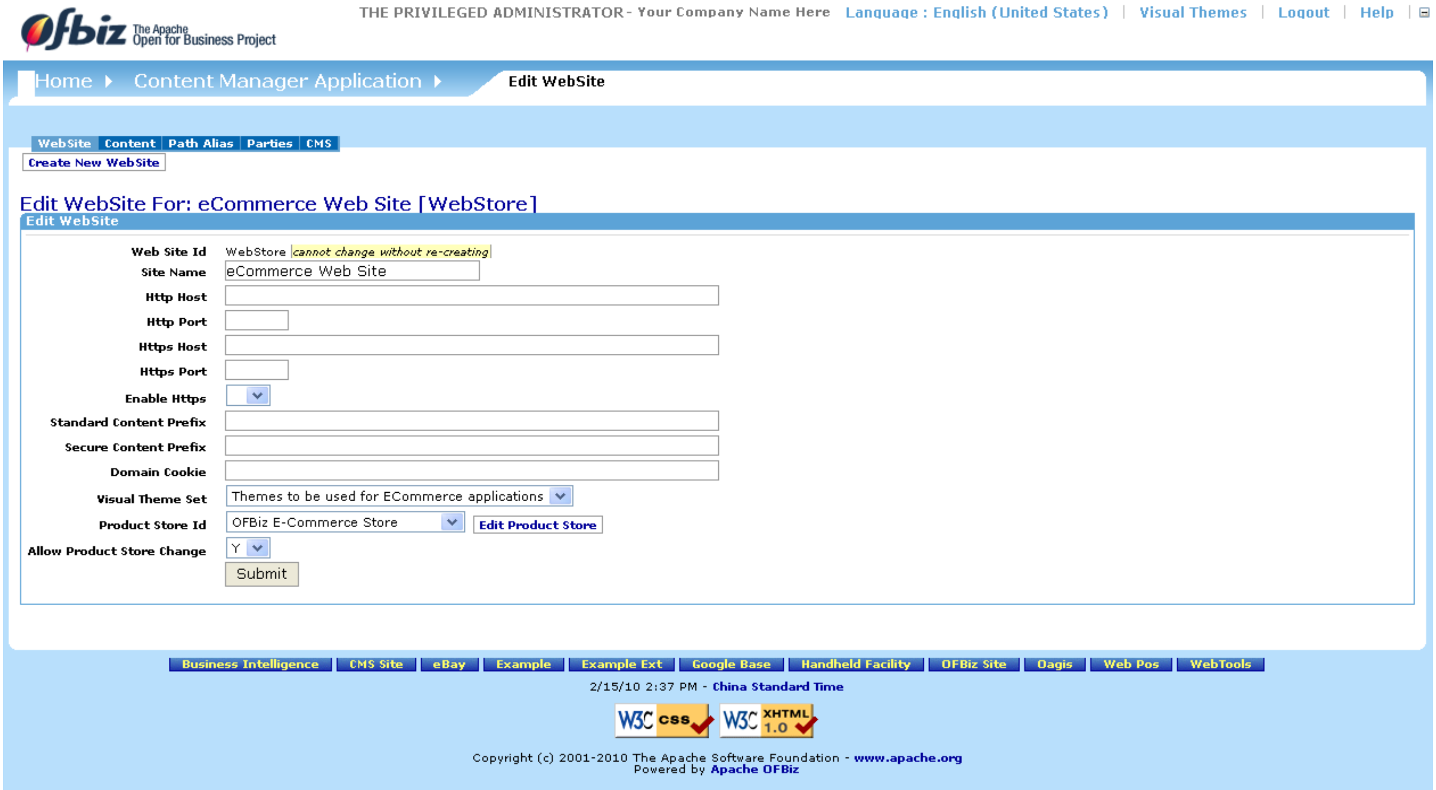
There is a WebSite already setup with the ID "WebStore". This ID is referred to in the webSiteId field of the web.xml file in the eCommerce webapp.

For this basic setup we will leave this as is. If you create a custom webapp for your ecommerce site, be sure to set the appropriate webSiteId in the web.xml file.

The WebSite record is used to configure which Product Store to use for the ecommerce site that references it. This WebSite is already configured to refer to the "OFBiz E-Commerce Store", which we will be modifying, so there is no need to change anything here.

Note that the settings in the url.properties file can be overridden for each WebSite, as can be seen on the Edit Web Site page in the Content Manager.

https://localhost:8443/content/control/EditWebSite?webSiteId=WebStore



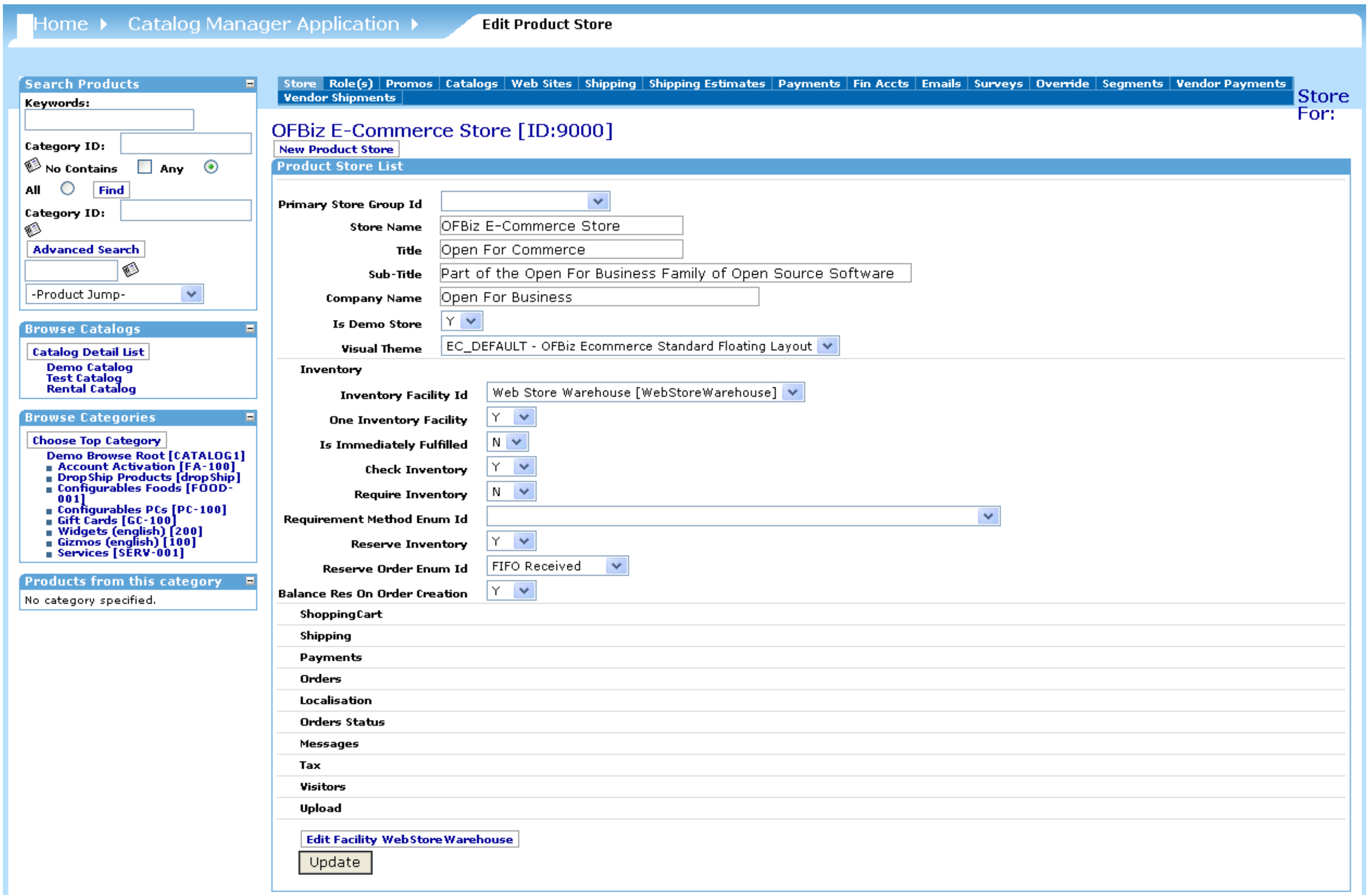

## Store Setup

There is a demo eCommerce store already setup with most of the options we need, so instead of creating a new one we will use that one and just change it's name and other options. The ID, which is 9000, will stay the same.

To modify this store go to the Catalog Manager application and select the Stores top level tab. This will bring up a Product Store List. Select the store with ID 9000, which by default has the name "OFBiz E-Commerce Store".

As we setup the store we will cover each tab in order and discuss options on that page and related options in configuration files:

https://localhost:8443/catalog/control/EditProductStore?productStoreId=9000



## Store Settings

Change the Store Name to something more applicable. This is mostly for internally referring to your store and won't be shown to the customer.

Change the Company Name to something more applicable, as desired.
There are various settings that can be used to change the way things show up in the default OFBiz eCommerce templates. You can change these for options you prefer, or for most fields you can empty them to have nothing displayed there.
The Title and Subtitle show in the header.

The Style Sheet refers to a CSS style sheet to use for the colors, fonts, etc for the site.

The Header Logo, Header Middle Background, and Header Right Background specify images in the 3 main areas of the header. To show no images, or background images, leave these blank.

The Pay To Party Id field is already set to Company as it should be, and that is the Party we configured earlier. For multiple organizations or if you have another company Party setup the party ID can be specified here.

To remove the demo messages on the checkout screens and order emails change the Is Demo Store field from Y to N.

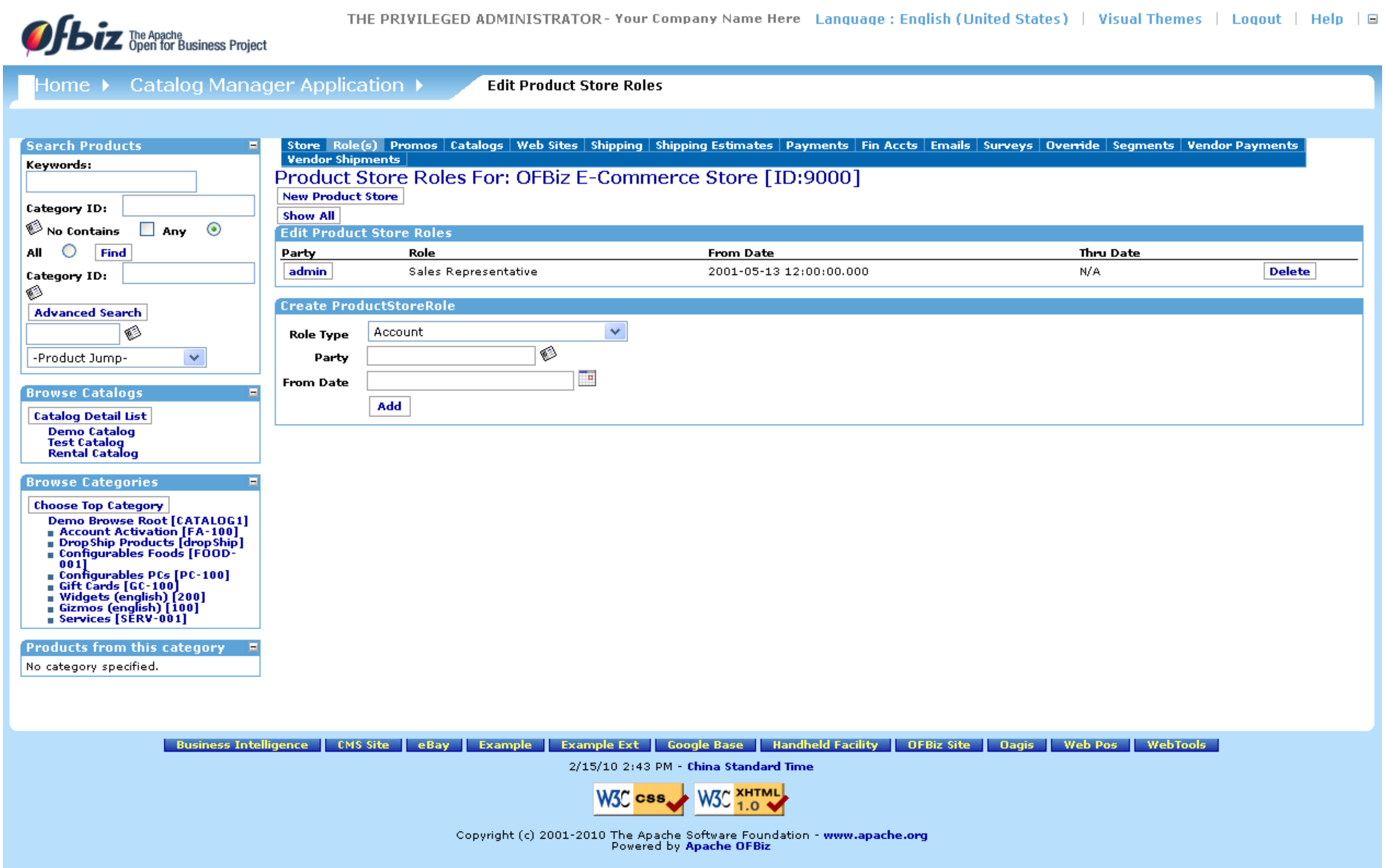
The Inventory Facility Id and the various inventory settings are already setup with good default, but you may review and change them as desired. Typically the only one you may want to change is the Require Inventory field. By default it is set to N, but changing it to Y will cause products to only be purchasable if they are in stock.

There are many other settings on the Store, most of which you won't want to touch. For more information on them see the Undersun documentation site or other such reference material

## Store Role Settings

There are various reasons why you might want to associate a Party with a Store. The main one to consider is in order for a Party to take sales orders for a specific Store the Party must be associated with the Store in the "Sales Representative" role.

https://localhost:8443/catalog/control/EditProductStoreRoles?productStoreId=9000




## Promotional Settings

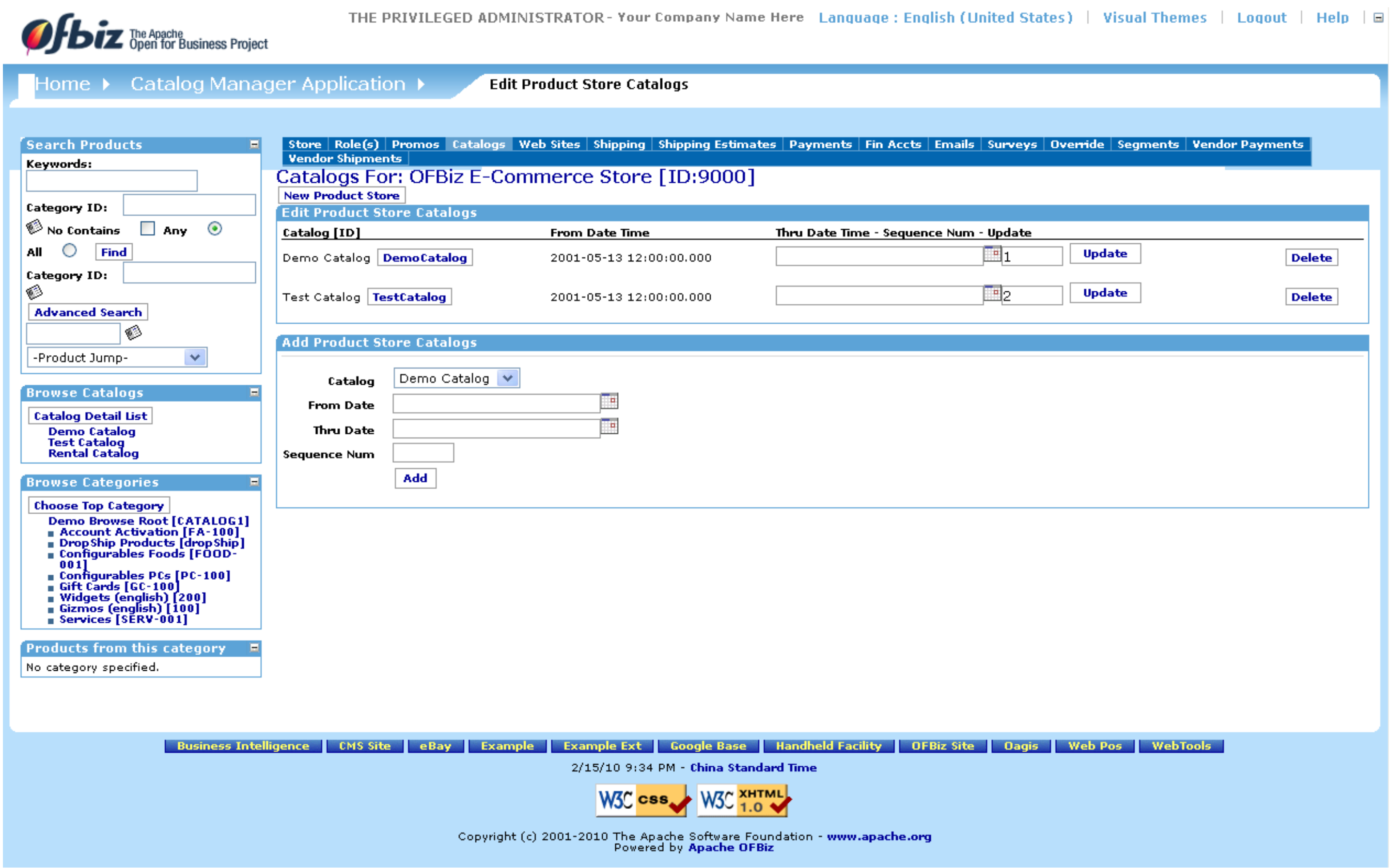
This is where you can associate promotions (setup in the Promos header tab) with the store, including effective dating, sequencing and so forth.

There are all example promotions and it is good to keep them in the database for future reference, but you can delete all of these store associations so they won't get in the way for this store. Just click on the "[Delete]" link for each one.

## Catalog Settings

This tab shows all Product Catalogs associated with this Store. The demo data has two Catalogs associated by default, and you can remove both of them since we will be creating a new Catalog later. These two you can leave in the database as examples for future reference, but click on the "[Delete]" buttons here to remove the associations with the Store.

https://localhost:8443/catalog/control/EditProductStoreCatalogs?productStoreId=9000

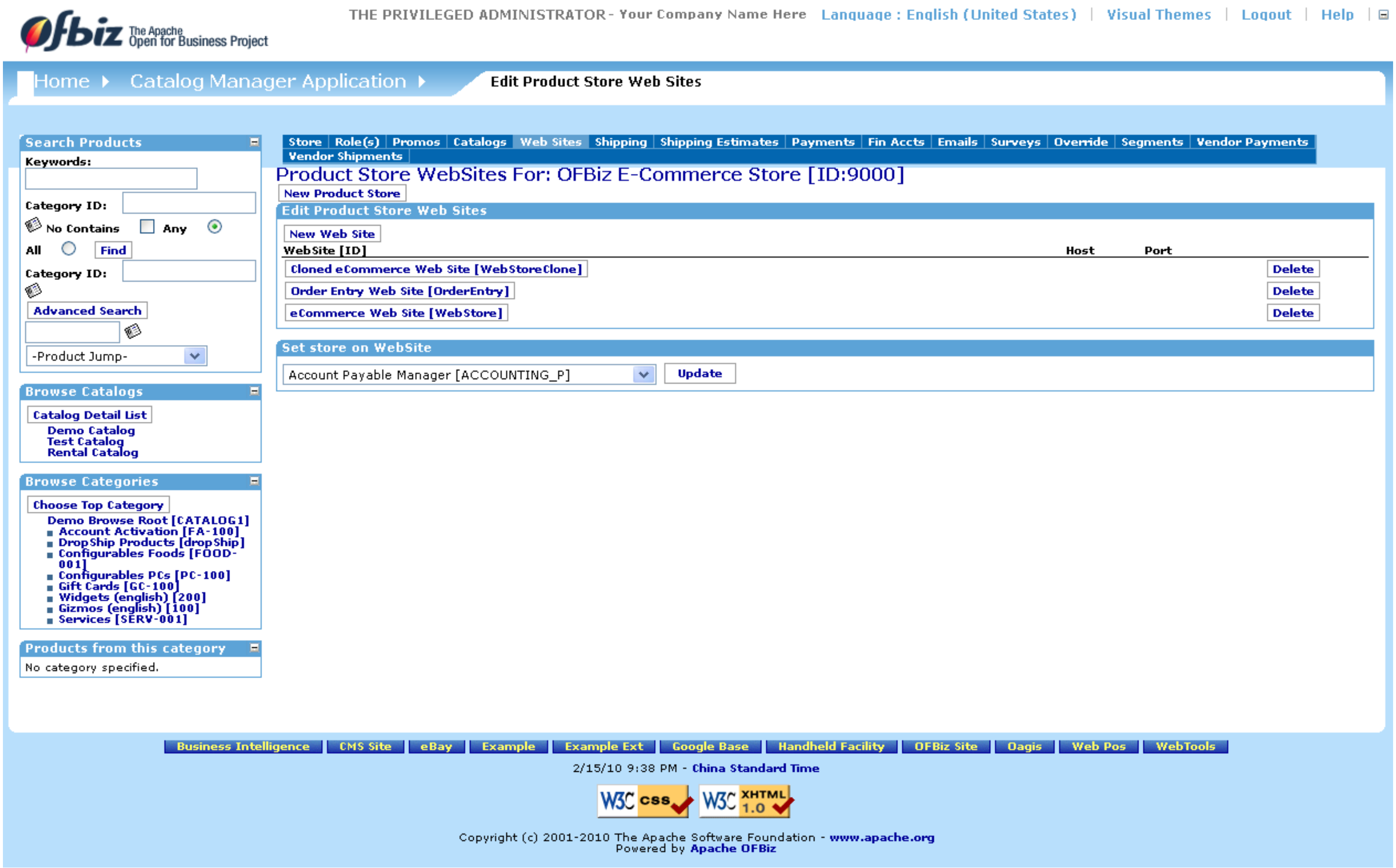



## Web Site Settings

This tab shows all WebSites associated with this store, or that this store is associated with. You will see that the demo data already has this Store associated with the eCommerce Web Site, and the Order Entry Web Site.
Leave these defaults as they are.

If you have your own ecommerce webapp and have created a WebSite for it as described above, associate that WebSite with the store.

https://localhost:8443/catalog/control/EditProductStoreWebSites?viewProductStoreId=9000



## Sales Tax Settings

It is possible to use other tax calculation services or integrate with other tax calculation software, and there are others included with OFBiz, but the default one uses a simple OFBiz entity with records for different tax jurisdictions and effective dates.

The demo data includes one example that applies for any Country, State, and Tax Category, has no Minimum Purchase amount, and the tax rate is 10%. Note that the tax rate is entered as a decimal number and not a whole percentage number. In other words, 10% is entered as "0.10" as shown in this example.

Delete the example sales tax entry and enter tax rates for any jurisdictions where you must collect a sales tax.

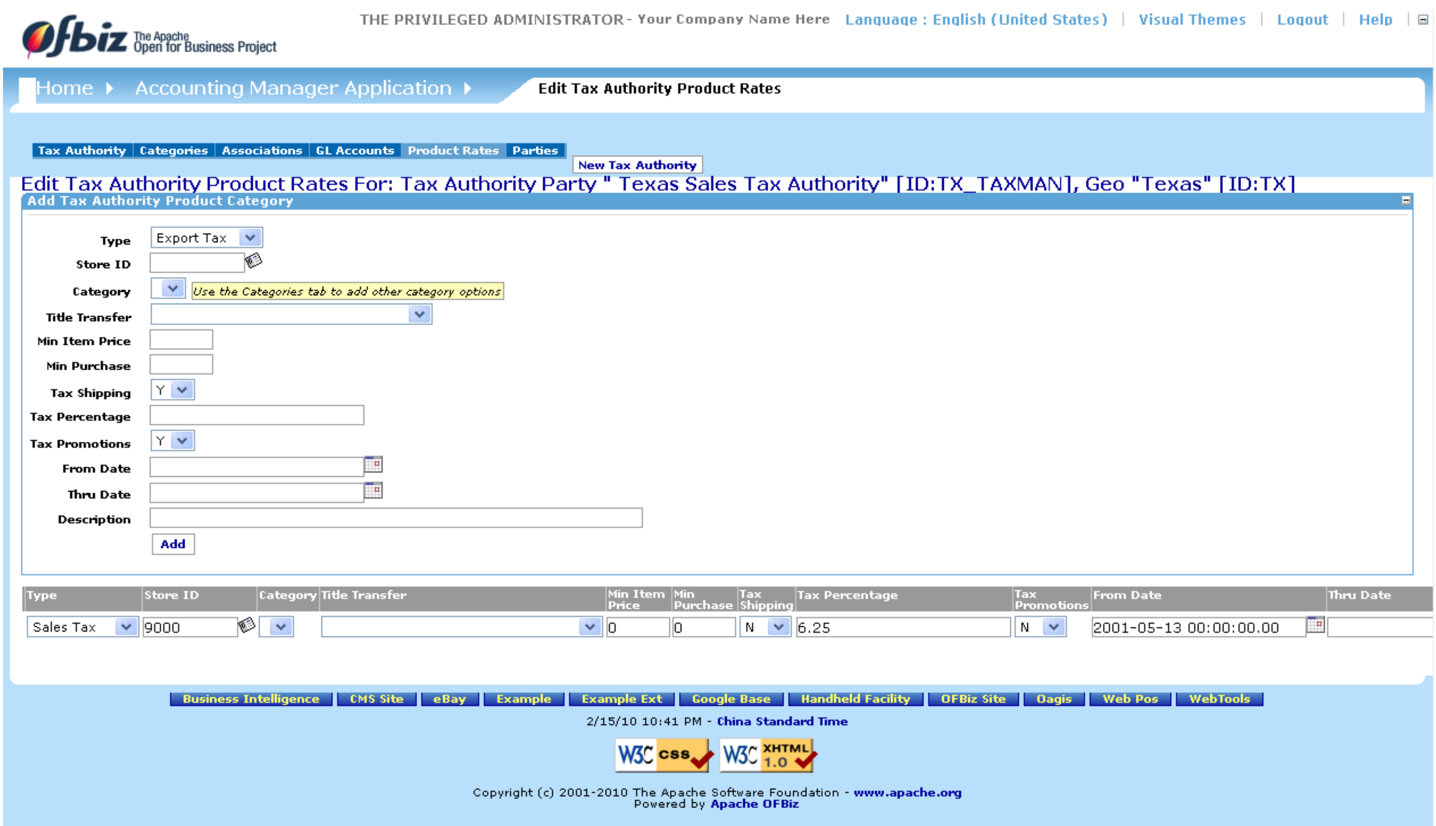
For more complicated tax requirements and data that is kept up to date consider commercial options. There is a TaxWare integration in OFBiz, but this runs through JNI to talk to the native TaxWare libraries (ie non-Java) and requires a lot of maintenance to use over time. Another option available in OFBiz is support for the ZipSales tax database, which can be imported and then updates are imported on a regular basis.

https://localhost:8443/accounting/control/FindTaxAuthority


Click [Edit]

Example:

https://localhost:8443/accounting/control/EditTaxAuthorityRateProducts?taxAuthPartyId=TX_TAXMAN&taxAuthGeoId=TX



## Shipping Settings

Each Store may have one or more shipping options configured. Shipping options consist of shipping methods, shipping providers and rules which link methods, providers and cost estimate calculations. The OFBiz e-commerce demonstration data is preconfigured with a number of shipping methods including "Ground", "Air", "Next Day" and "None" and several well know shipping providers including, United Parcel Service (UPS), the United States Post Office (USPS). In addition, templates for cost estimate rules are provided to ease the customization process. Finally, OFBiz provides interfaces, and in some cases, rudimentary configuration guidance, to allow the e-commerce store to connect directly and communication with several major shipping providers.

4 Expert Recommendations: Similar to the tax calculation set up, the Shipping tab interface includes many variables for shipping and shipping cost calculations. Note that at this time the user interface provided through the OFBiz Catalog Manager is limited. This interface is sufficient for creating new shipment methods and estimates. It is recommended that the provided examples be used as templates for any new configurations desired, but that they be deleted and new ones created rather than trying to edit them.

Selection of the Shipping tab brings up the primary shipping options page (Product Store Shipment Settings) for the currently selected OFBiz store. A summary table of all the currently configured shipping methods and estimates is displayed. This display includes the method type (for example, UPS, Ground, Next Day and No Shipping), some basic estimate information (discussed below) and links to delete the estimate for the method from the store (but not the shipment method itself) and links to view the details of each estimate.

4 Expert Recommendation: select the "view" link on one or more existing methods to get a better understanding of how shipping methods and cost estimates are constructed.

From the Product Store Shipment Settings page, there are two main sub-page links:

1. New Shipment Estimate
2. New Shipment Method

The New Shipping Estimate link allows the user to apply a new estimate to the store for an existing shipping method. Shipping methods may have one or more estimates associated with them - ...For example, if the default configuration for "Guaranteed Next Day (UPS) should be changed from no surcharge for a specific feature group to a fixed surcharge for a feature group, this is the place to do it.

The New Shipment Method link provides access to the interface for modifying and creating new Shipment Methods Types and Carrier Shipment Methods (where Carrier Shipment Methods are a combination of a Shipment Method Type and a Carrier Party.)

The New Shipment Method page is the best place to start. Here you can create/update Shipment Method Types, Carrier Shipment Methods (a combination of a Shipment Method Type and a Carrier Party), and then at the top of the page you can associate a Carrier Shipment Method with the Store (this is where most of the options are specified).

Once those are ready use the New Shipment Estimate page to enter price information (kind of like price rules) about a specific Carrier Shipment Method associated with this store.

From either of these two pages you can get back to the summary of all of the cost information for these estimates with the View Estimates link.

## UPS Online Rate Estimates

This is used during the checkout process to get an estimate from UPS based on the weights of products being ordered.

You must have an account with UPS to be able to use this service.
NOTE that products MUST have values in their Weight and Weight Uom Id fields for ALL products in order for this to work properly.

If you specify an estimated cost along with this, based on whatever criteria just as with normal shipping estimates, those values are added to what comes back from UPS.

This is activated by creating a shipping estimate record in the Catalog Manager with the Service Name of "upsRateEstimate" on the ProductStoreShipmentMeth record in the serviceName field (ie on the **Store Shipment Method** associating a Carrier Shipment Method with this Product Store).

For this to work the CarrierShipmentMethod.carrierServiceCode field must be populated (as it is in the DemoShipping.xml file). Ground is 03, Air is 02, Next Day is 01 for UPS. For others see the UpsServices.java file.

This is configured using various properties in the file:

`${ofbiz install dir}/applications/product/config/shipment.properties`

1. UPS XPCI Access License Number
    a. o shipment.ups.access.license.number
    b. o Example: TEST262223144CAT
    c. o This license number is used for both the UPS shipment estimate online service and the UPS XPCI shipping interface services (described below)
2. Shipper Default Pickup Type
    a. shipment.ups.shipper.pickup.type
    b. Example: 06
    c. Valid options:
        i. 01 - Daily Pickup
        ii. 03 - Customer Counter
        iii. 06 - One Time Pickup
        iv. 07 - On Call Air Pickup
        v. 11 - Suggested Retail Rates (UPS Store)
        vi. 19 - Letter Center
        vii. 20 - Air Service Center
    d. Choose the option that represents your relationship with UPS. This affects the estimated rate you will get back since UPS varies their prices based on how you get your packages to them.
3. Estimate split into packages
    a. shipment.ups.max.estimate.weight
    b. Example: "90" meaning 90 pounds
    c. This number is used as the max weight per package when the total weight is > than this weight the weights are split into packages not exceeding max.

## UPS XPCI Integration

The UPS XPCI services provide for all interactions between a customer and UPS to register shipments, send weight/size information for each package, get actual prices from UPS, and get images for complete labels to print and affix to each package.

Note that UPS only offers this service to larger customers. The policy may have changed, but last I heard daily pickups must be used and at least 50 packages must be shipped each day (each business day).

These services are integrated with the Shipment code in the Route Segments area and links in the user interface appear when the Carrier Party ID is "UPS".

This is configured using various properties in the file:

`${ofbiz install dir}/applications/product/config/shipment.properties`

1. UPS Shipper Number
    a. shipment.ups.shipper.number
    b. Example: 486915
2. UPS Bill Shipper Account Number
    a. shipment.ups.bill.shipper.account.number
    b. Example: 486915
3. UPS XPCI Access License Number
    a. shipment.ups.access.license.number
    b. Example: TEST262223144CAT
4. UPS XPCI Access User ID
    a. shipment.ups.access.user.id
5. UPS XPCI Access Password
    a. shipment.ups.access.password
6. Setting to save files needed for UPS certification
    a. shipment.ups.save.certification.info=true
    b. shipment.ups.save.certification.path=/ofbiz/work/ofbiz/upscert
    c. This option is used to create the artifacts the UPS needs to certify client implementation. It is generally required for each customer to go through this process and for UPS to verify the results. Once this is done the shipment.ups.save.certification.info property should be set to false. For more information on this process, see the UPS XPCI documentation and additional information in the UpsServices.java file.

## USPS Online Rate Estimates

This is used during the checkout process to get an estimate from USPS (the United State Postal Service) based on the weights of products being ordered.

You must have an account with USPS to be able to use this service.

NOTE that products MUST have values in their Weight and Weight Uom Id fields for ALL products in order for this to work properly.

If you specify an estimated cost along with this, based on whatever criteria just as with normal shipping estimates, those values are added to what comes back from USPS.
This is activated by creating a shipping estimate record in the Catalog Manager with the Service Name of "uspsRateInquire" on each applicable ProductStoreShipmentMeth record (ie the Shipment Estimate associating a Carrier Shipment Method with this Product Store).

For this to work the CarrierShipmentMethod.carrierServiceCode field must be populated (as it is in the DemoShipping.xml file). Examples include "Priority", "Express", etc.

This is configured using various properties in the file:

```
${ofbiz install dir}/applications/product/config/shipment.properties
```

1. USPS Connection URL & timeout in seconds
    a. shipment.usps.connect.url
    b. Example: http://localhost/facility/ShippingAPI.dll
    c. shipment.usps.connect.timeout
    d. Example: 60
2. USPS Credentials
    a. shipment.usps.access.userid
    b. shipment.usps.access.password
3. Estimate split into packages
    a. shipment.usps.max.estimate.weight
    b. Example: 70

## Store Payment Settings

This page is used to configure the payment processing settings for the various Payment Method Types in OFBiz.

In the demo data you will see configured the test service for all payment methods, including Credit Card, Electronic Funds Transfer (EFT), PayPal, WorldPay, and Gift Cards. It is important to remove all of the "alwaysApprove*" and "test*" service references since those will allow bogus payments to go through.

The only demo configurations that can remain, assuming you want to use them, are the PayPal and WorldPay settings. These don't use configurable services, so the configuration is simpler.

To setup Credit Card (and certain other payment types) processing just specify the services to use for each of the following processes:

1. Payment Authorization Service
2. Payment Capture Service
3. Payment Re-Authorization Service
4. Payment Refund Service

5. Payment Release Authorization Service

All service definitions for the payment processing that are included with OFBiz are in the ${ofbiz install dir}/applications/accounting/servicedef directory.

1. For CyberSource see the service definitions in the services_cybersource.xml file. This includes these services: cyberSourceCCAuth, cyberSourceCCCapture, cyberSourceCCRelease, cyberSourceCCRefund, and cyberSourceCCCredit
2. For ClearCommerce see the service definitions in the services_clearcommerce.xml file.
3. For PCCharge see the service definitions in the services_pccharge.xml file.
4. For RiTA see the service definitions in the services_rita.xml file.
5. For Verisign PayFlo Pro see the service definitions in the services_verisign.xml file.
6. For ValueLink (gift cards) see the service definitions in the services_valuelink.xml file.

## Payment Processor Details

While the payment services and high level settings are configured in the Store section of the Catalog Manager the detailed configuration for the various payment processing services are configured in the file:

```
${ofbiz install dir}/applications/accounting/config/payment.properties
```

1. There are many comments in this file and sections for each of the major payment processing services.
2. If you are using any credit card payment processor, be sure to check and if necessary change the properties near the beginning of the payment.properties file that follow the pattern: "payment.general.reauth.*.days".

## PayPal Payment Setup

1. Go to Accounting - Payment Gateway Config and select "PayPal Payment Gateway" from the list

2. Please fill all those fields to made working correctly to work with PayPal:


Business Email : Email address of your business

Notify URL : PayPal Notify URL (example (http://yourServerName/ecommerce/control/payPalNotify)

Return URL : PayPal Return URL (example (http://yourServerName/ecommerce/control/orderhistory)

Cancel Return URL : PayPal Return On Cancel URL (example http://yourServerName/ecommerce/control/payPalCancel/main)

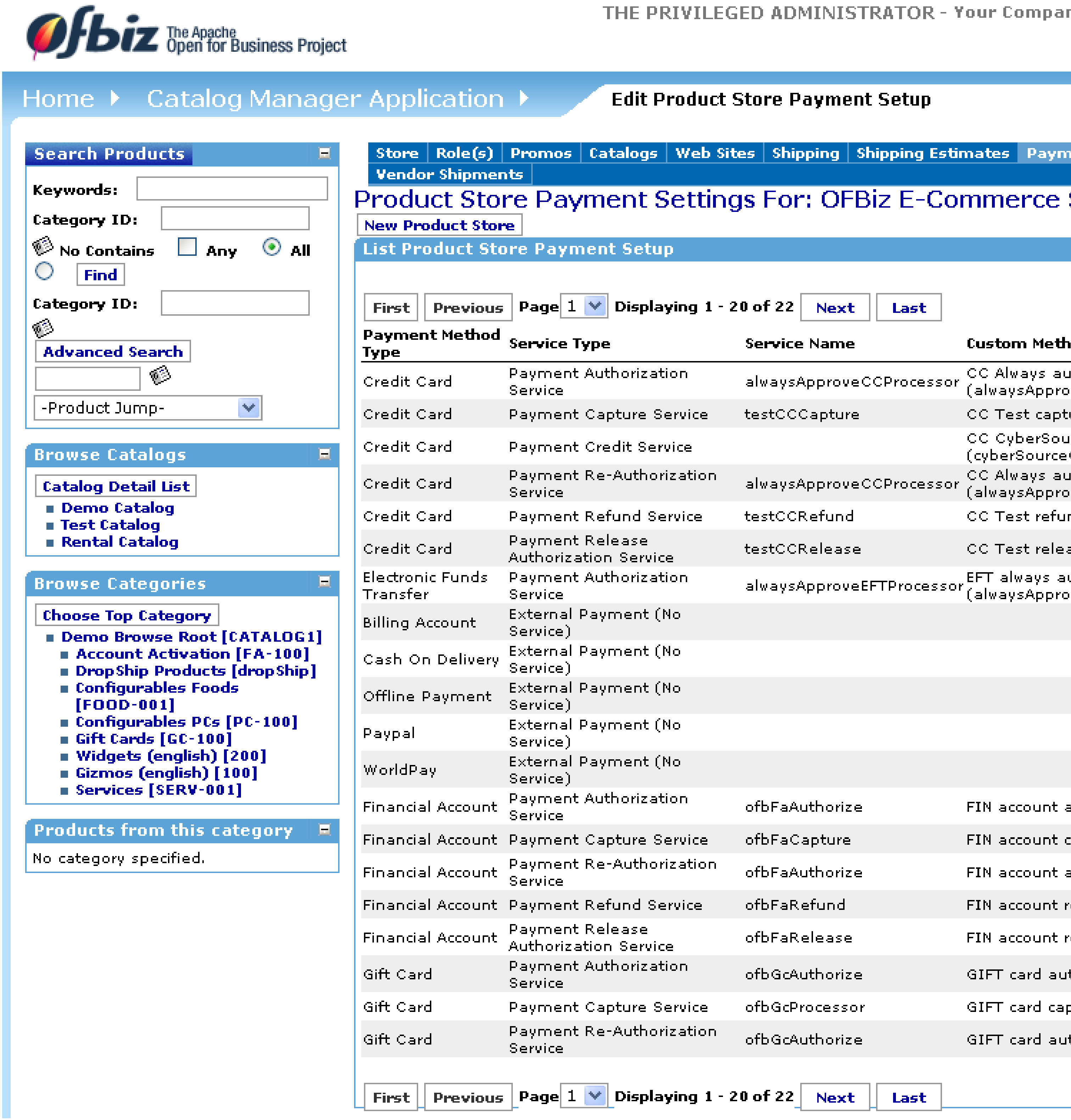
Image URL : Image To Use On PayPal (example (http://yourServerName/images/ofbiz_logo.gif)

Confirm Template : Thank-You / Confirm Order Template (example /order/emailconfirmation.ftl)

Redirect URL : PayPal Redirect URL (Sandbox http://www.sandbox.paypal.com/us/cgi-bin/webscr Production https://www.paypal.com/cgi-bin/webscr)

Confirm URL : PayPal Confirm URL (Sandbox https://www.sandbox.paypal.com/us/cgi-bin/webscr Production http://www.paypal.com/cgi-bin/webscr)

3. Once PayPal Payment Gateway has been configurated you have to go to Catalog - Stores - select your Store - Payments tab




| Payment Method Type | Service Type | Service Name | Custom Meth |
|---|---|---|---|
| Credit Card | Payment Authorization Service | alwaysApproveCCProcessor | CC Always au (alwaysAppro |
| Credit Card | Payment Capture Service | testCCCapture | CC Test capt |
| Credit Card | Payment Credit Service | | CC CyberSou (cyberSource |
| Credit Card | Payment Re-Authorization Service | alwaysApproveCCProcessor | CC Always au (alwaysAppro |
| Credit Card | Payment Refund Service | testCCRefund | CC Test refur |
| Credit Card | Payment Release Authorization Service | testCCRelease | CC Test relea |
| Electronic Funds Transfer | Payment Authorization Service | alwaysApproveEFTProcessor | EFT always au (alwaysAppro |
| Billing Account | External Payment (No Service) | | |
| Cash On Delivery | External Payment (No Service) | | |
| Offline Payment | External Payment (No Service) | | |
| Paypal | External Payment (No Service) | | |
| WorldPay | External Payment (No Service) | | |
| Financial Account | Payment Authorization Service | ofbFaAuthorize | FIN account a |
| Financial Account | Payment Capture Service | ofbFaCapture | FIN account c |
| Financial Account | Payment Re-Authorization Service | ofbFaAuthorize | FIN account a |
| Financial Account | Payment Refund Service | ofbFaRefund | FIN account r |
| Financial Account | Payment Release Authorization Service | ofbFaRelease | FIN account r |
| Gift Card | Payment Authorization Service | ofbGcAuthorize | GIFT card aut |
| Gift Card | Payment Capture Service | ofbGcProcessor | GIFT card cap |
| Gift Card | Payment Re-Authorization Service | ofbGcAuthorize | GIFT card aut |

4. Edit the Payment Method Type Paypal and choose as Payment Gateway Config Id "PayPal Config".


5. As deprecated use you can alternatively change the configuration parameters into
6. ${ofbiz install dir}/applications/accounting/config/payment.properties

The ones that always need to be changed for use of PayPal are:

a. payment.paypal.business - set to an email address on your PayPal account
b. payment.paypal.notify - just change domain name and port to the production values you are using
c. payment.paypal.return - set to the URL where you want PayPal to send customers once payment is complete, typically back to your ecommerce web site
d. payment.paypal.cancelReturn - set to the URL where you want PayPal to send customers when they cancel their payment
e. payment.paypal.image - set to the URL of the image or logo you want PayPal to display to help customers know that the payment is being received on your behalf

The other properties beginning with "payment.paypal." can be set, but unless you know what you are doing we recommending leaving them as-is.

In addition to the settings in the payment.properties file, there is also a setting that you must change on the PayPal web site in your account so that notifications will be sent back to OFBiz to verify payment:

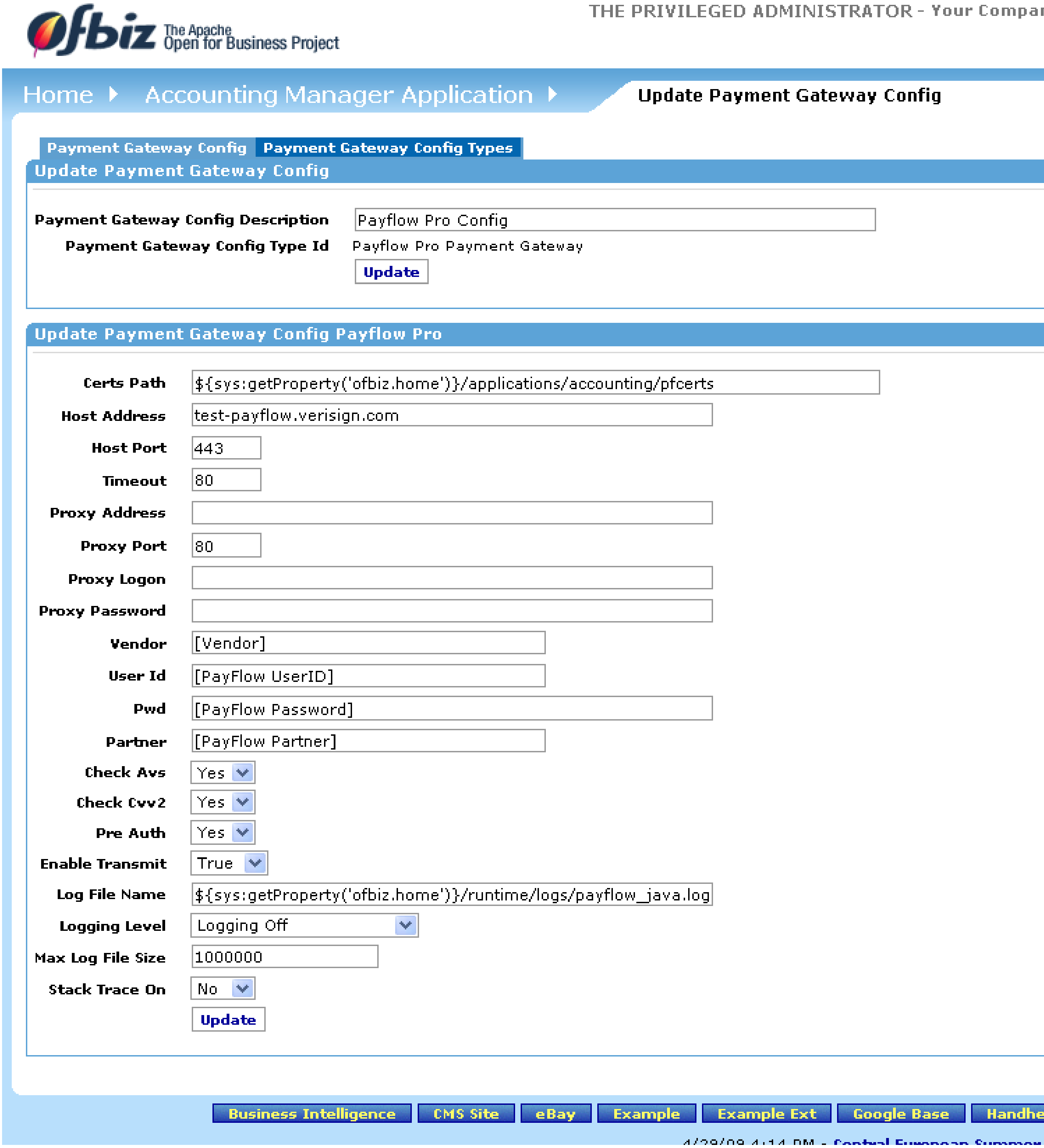
1.
    a. Login to your account at PayPal.com
    b. Click on the "Profile" link in the header, near the top-right of the page
    c. In the "Selling Preferences" column click on the "Instance Payment Notification Preferences"
    d. It will show you the current settings. To chance click on the "Edit" button.
    e. Check the check box near the top of this page, just under the "Instant Payment Notification (IPN)" heading.
    f. Enter the notification URL in the text box. This should be the same as the value of the payment.paypal.notify property in the payment.properties file.
    g. Click on the "Save" button.

## Payflow Pro Payment Setup

1. Put payflow.jar from Payflow Pro's Java SDK in the directory in
2. `${ofbiz install dir}applications/accounting/lib`.

3. Change the accounting build.xml and comments to not exclude verisign sources like here :
   <!~~- <exclude name="org/ofbiz/accounting/thirdparty/verisign/**"/> -~~>
4. Confirm that applications/accounting/build/classes/org/ofbiz/accounting/thirdparty/verisign/PayflowPro.class was built and exists
5. The installation of certificate is now no more necessary
6. Go to Accounting - Payment Gateway Config and select "Payflow Pro Payment Gateway" from the list

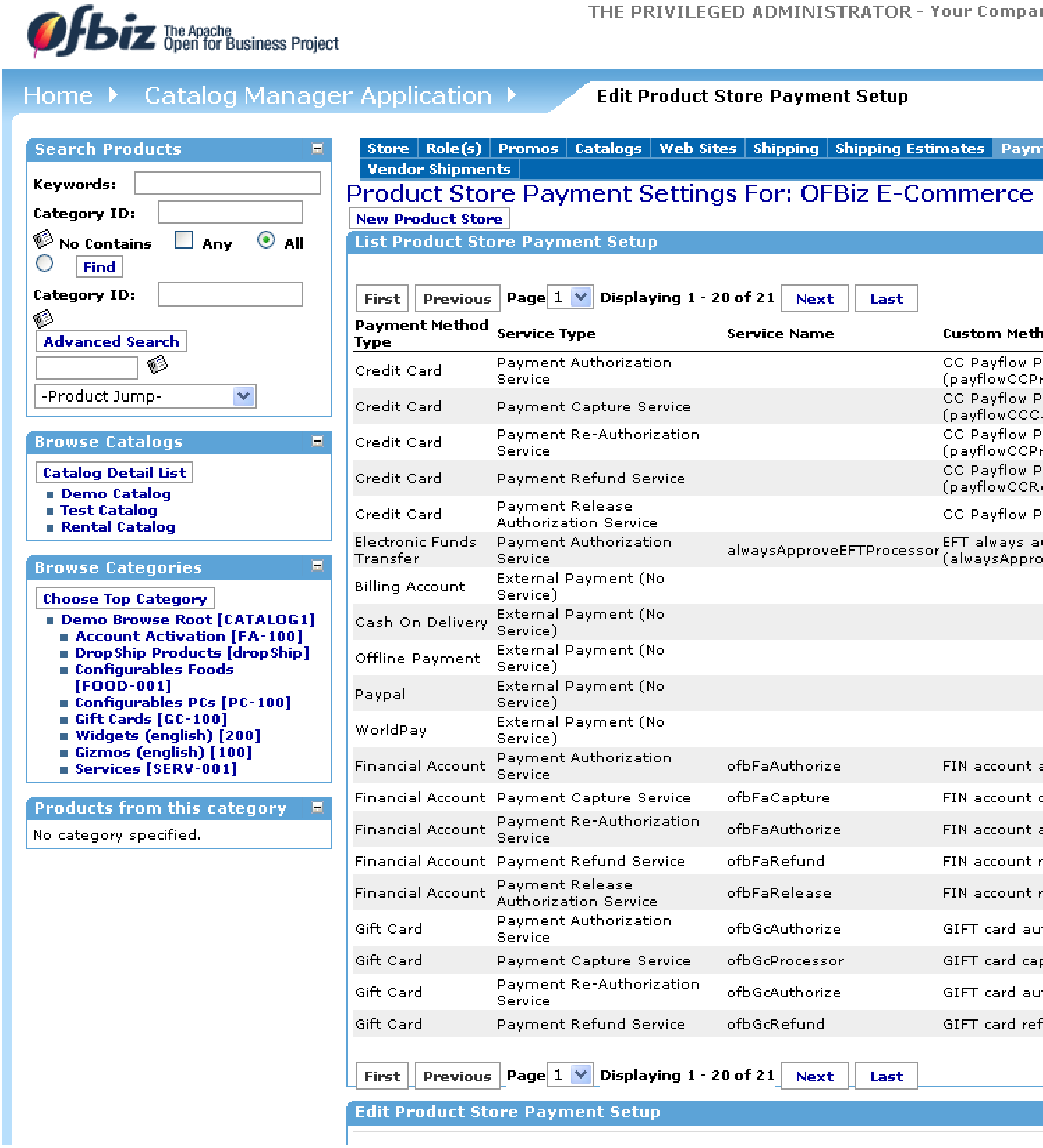
7. Please fill all those fields to made working correctly to work with Payflow Pro:



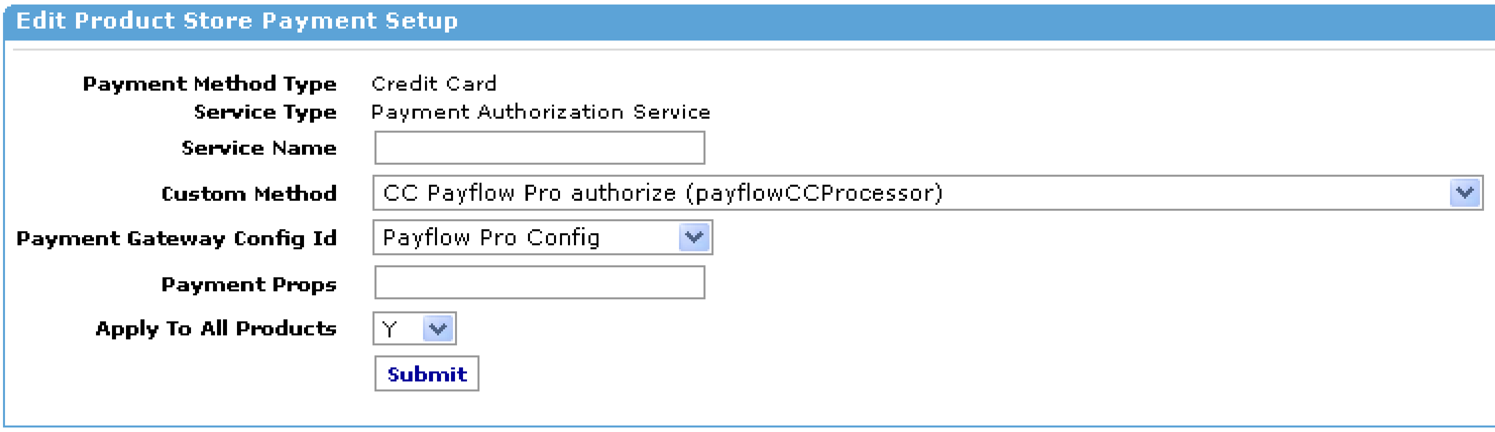

Certs Path : Path the the VeriSign Certificate (No more used from version v4)

Host Address : Address of the payment processor (example (Test [pilot-payflowpro.paypal.com] or Production [payflowpro.paypal.com])
Host Port : Port of the payment processor (default is 443)
Timeout : Timeout (default is 80 seconds)
Proxy Address : Proxy Address
Proxy Port : Proxy Port (default is 80)
Proxy Logon : Proxy Logon
Proxy Password : Proxy Password
Vendor : Vendor of account information
User Id : PayFlow UserID of account information
Pwd : PayFlow Password of account information
Partner : PayFlow Partner of account information
Check Avs : Use Address Verification
Check Cvv2 : Require CVV2 Verification
Pre Auth : Pre-Authorize Payments (if set to N will auto-capture)
Enable Transmit : Set to false to not transmit anything
Log File Name : Log file name
Logging Level : Logging level
Max Log File Size : Max log file size
Stack Trace On : Stack trace on/off

8. Once Payflow Pro Payment Gateway has been configurated you have to go to Catalog - Stores - select your Store - Payments tab



9. Edit the Payment Method Type Credit Card and after selected a Service Type (Authorize, Capture, ...) you can choose the Custom Method related to the Service Type choosen and as Payment Gateway Config Id "Payflow Pro Config".




As deprecated use you can alternatively change the configuration parameters into

${ofbiz install dir}/applications/accounting/config/payment.properties

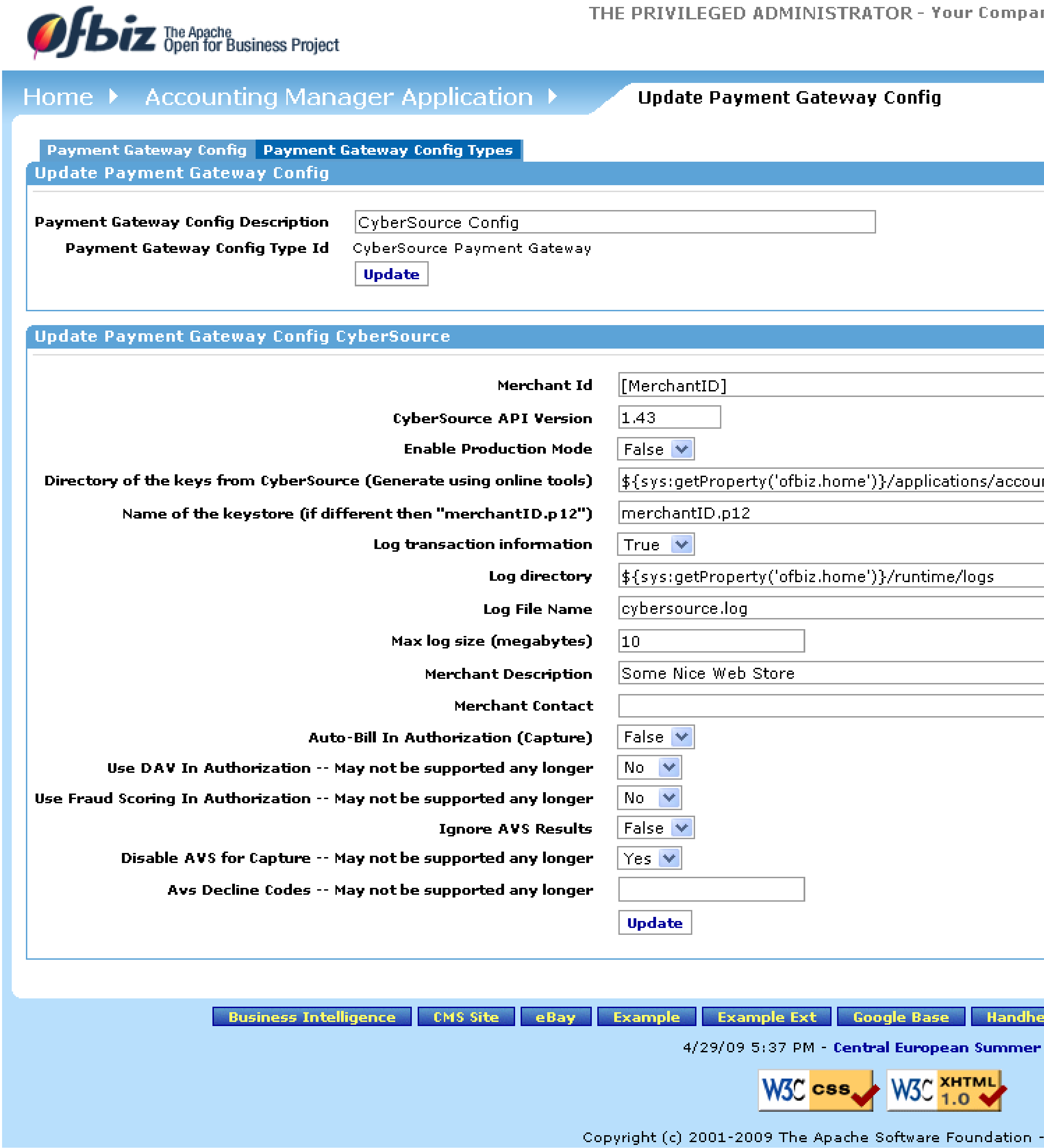
Configure all the parameters starting with name "payment.verisign" in payment.properties including directory, vendor, partner, user and password all.

## CyberSource Payment Setup

1. Put cybsclients15.jar, cybssecurity.jar and xalan.jar from CyberSource SDK in the directory in
2. ${ofbiz install dir}applications/accounting/lib/cybersource.

3. Change the accounting build.xml and comments to not exclude verisign sources like here :
   <!~~- <exclude name="org/ofbiz/accounting/thirdparty/cybersource/**"/> -~~>
4. Confirm that applications/accounting/build/classes/org/ofbiz/accounting/thirdparty/cybersource/IcsPaymentServices.class was built and exists
5. The installation of certificate is requested and you can follow the instructions into the CyberSource Certificate Update manual.
6. Go to Accounting - Payment Gateway Config and select "CyberSource Payment Gateway" from the list

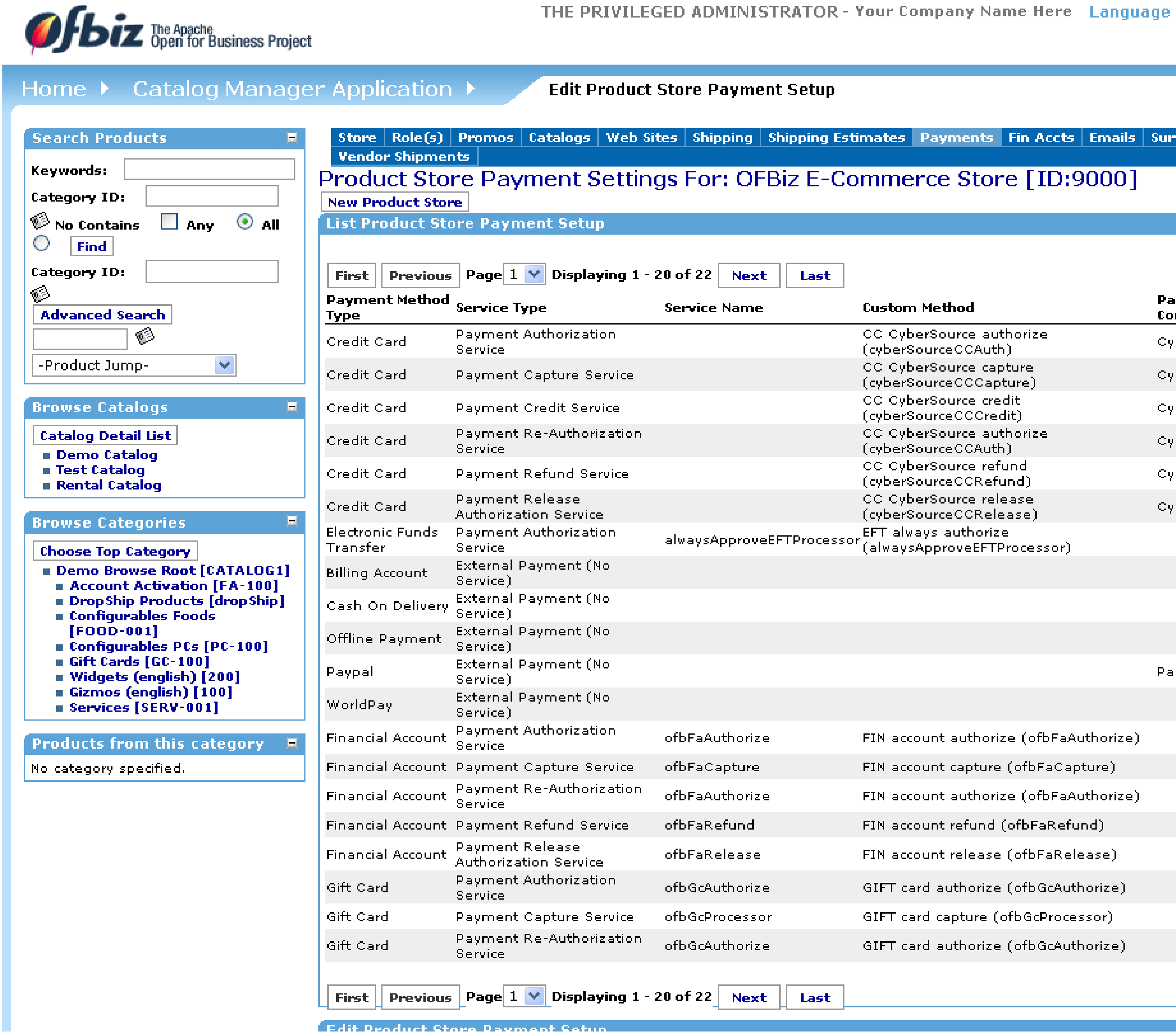
7. Please fill all those fields to made working correctly to work with CyberSource:



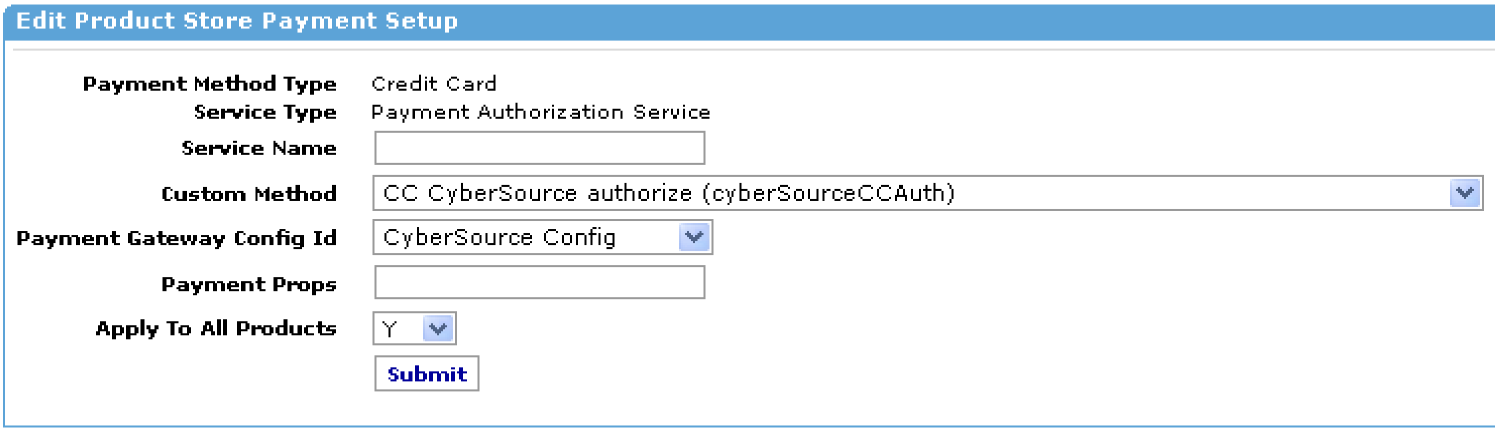

Merchant Id : your merchant Id

CyberSource API version : target API version (now is 1.43)
Directory of the keys from CyberSource : Generate using online tools
Name of the keystore : keystore file name (default is "merchantID".p12)
Log transaction information : log activated true/false (default is true)
Log directory : Log directory (default is runtime/logs)
Log File Name : Log file name (default is cybersource.log)
Max log size : Megabytes allowed for the log file
Merchant Description : Shown on credit card statement Vendor
Merchant Description Contact Information : Shown on credit card statement Vendor
Auto-Bill In Authorization : Capture automatically true/false (default is false)
Use DAV In Authorization : May not be supported any longer
Use Fraud Scoring In Authorization : May not be supported any longer
Ignore AVS results : Ignore Address Verification Service true/false (default is false)
Disable AVS for Capture : May not be supported any longer
AVS Decline Codes : May not be supported any longer

8. Once CyberSource Payment Gateway has been configurated you have to go to Catalog - Stores - select your Store - Payments tab



9. Edit the Payment Method Type Credit Card and after selected a Service Type (Authorize, Capture, ...) you can choose the Custom Method related to the Service Type choosen and as Payment Gateway Config Id "CyberSource Config".




As deprecated use you can alternatively change the configuration parameters into

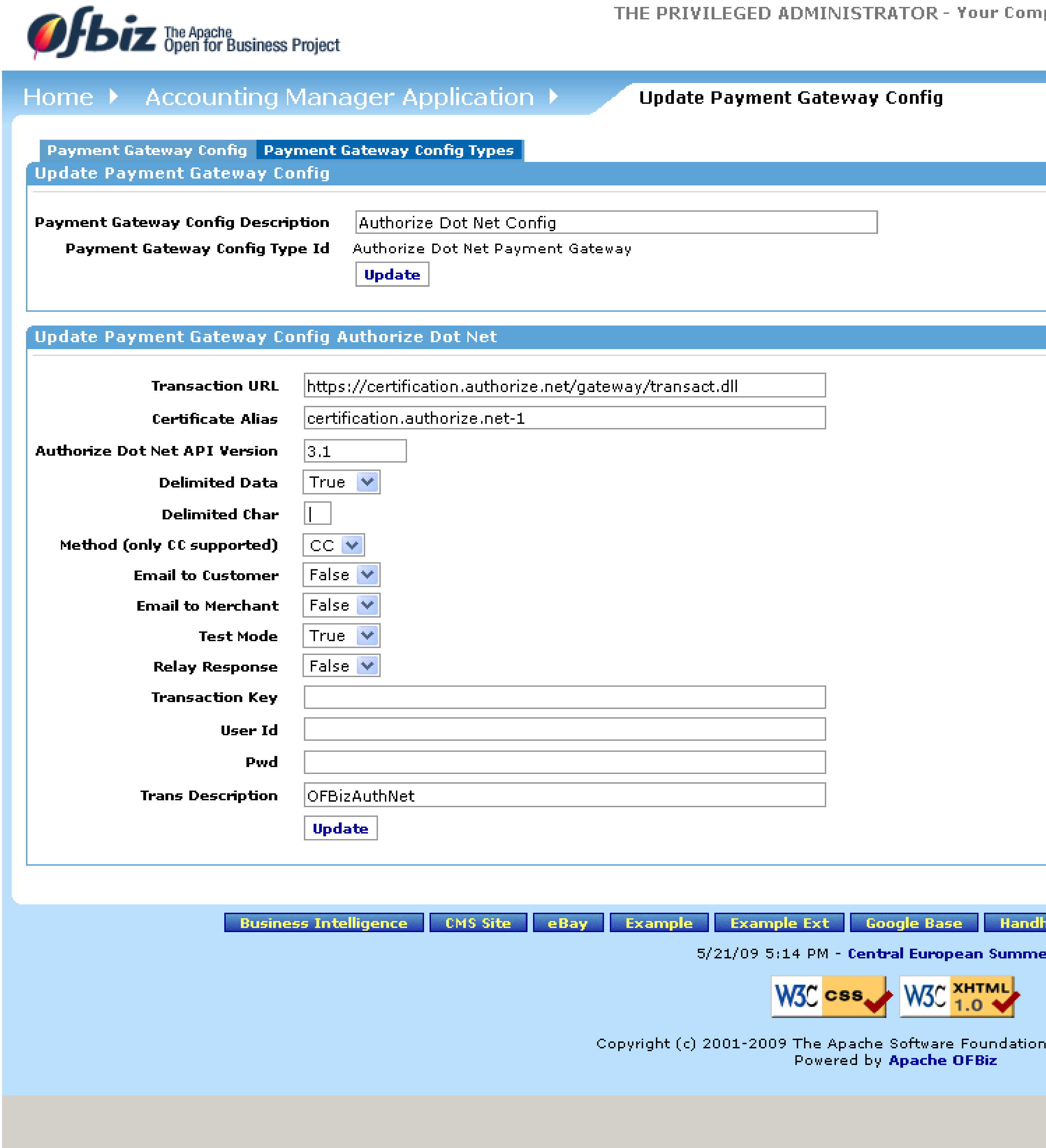
${ofbiz install dir}/applications/accounting/config/payment.properties

Configure all the parameters starting with name "payment.cybersource" in payment.properties including directory, vendor, partner, user and password all.

## Authorize.net Payment Setup

1. The installation of certificate is requested and you can follow also use the instructions from Andreas Sterbenz's blog documented in Google Checkout Integration.
2. Go to Accounting - Payment Gateway Config and select "Authorize Dot Net Payment Gateway" from the list

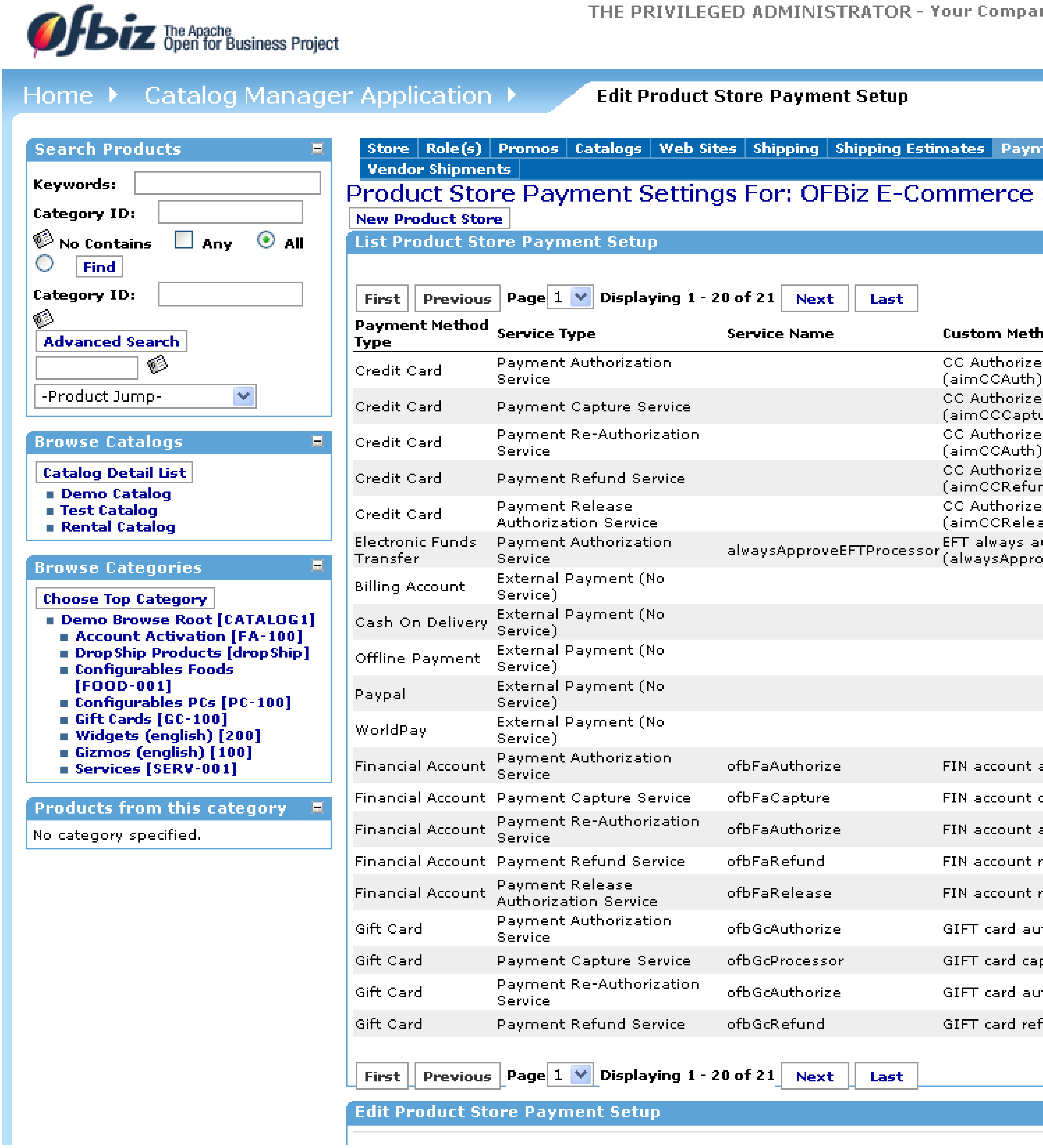
3. Please fill all those fields to made working correctly to work with Authorize.net:



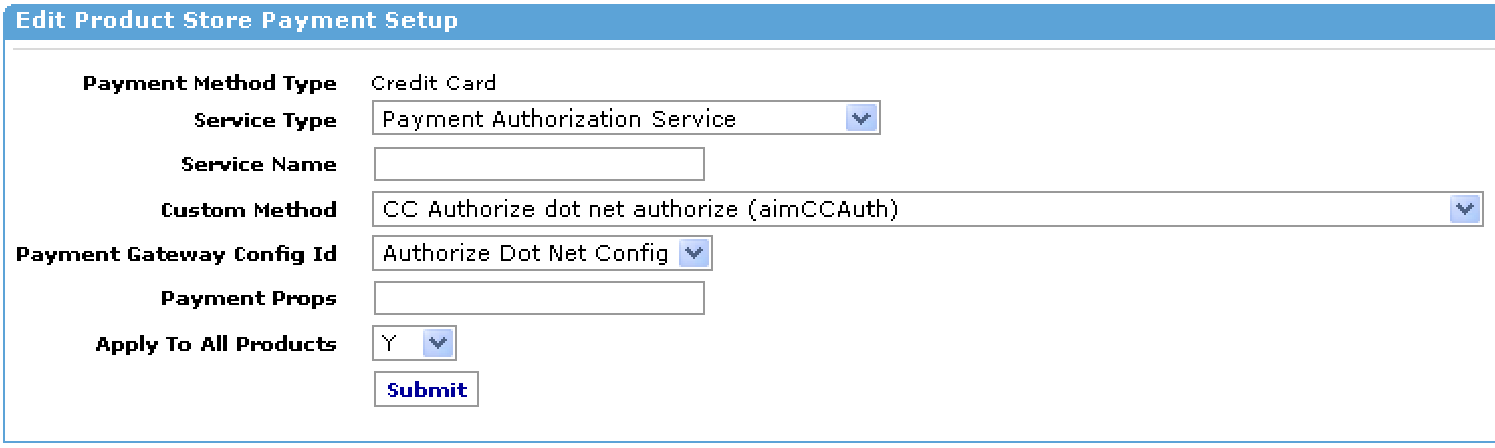

Transaction URL : Test/Production Transaction Url

Certificate Alias : Certificate Alias in the Keystore.
Authorize Dot Net API version : currently 3.1
Delimited Data : if the authorize.net response should delimited
Delimited Character : the delimiter to use in the response.
Method (only CC supported) : credit card processing.
Email to Customer : if should send an email to the customer for each transaction
Email to Merchant : if should send email to the merchant for each transaction
Test Mode : Forces the URL property to the test URL and adds more logging info to the logs
Relay Response : if should relay the reposnse to a different server
Transaction Key : Authorizer.net transaction key.
User Id : Your Authorize.net user id.
Pwd : Your Authorize.net password.
Trans Description : Your Transaction Description.

4. Once Authorize.net Payment Gateway has been configurated you have to go to Catalog - Stores - select your Store - Payments tab



5. Edit the Payment Method Type Credit Card and after selected a Service Type (Authorize, Capture, ...) you can choose the Custom Method related to the Service Type choosen and as Payment Gateway Config Id "Authorize Dot Net Config".




As deprecated use you can alternatively change the configuration parameters into

`${ofbiz install dir}/applications/accounting/config/payment.properties`

Configure all the parameters starting with name "payment.authorizedotnet" in payment.properties.

## RBS WorldPay Payment Setup

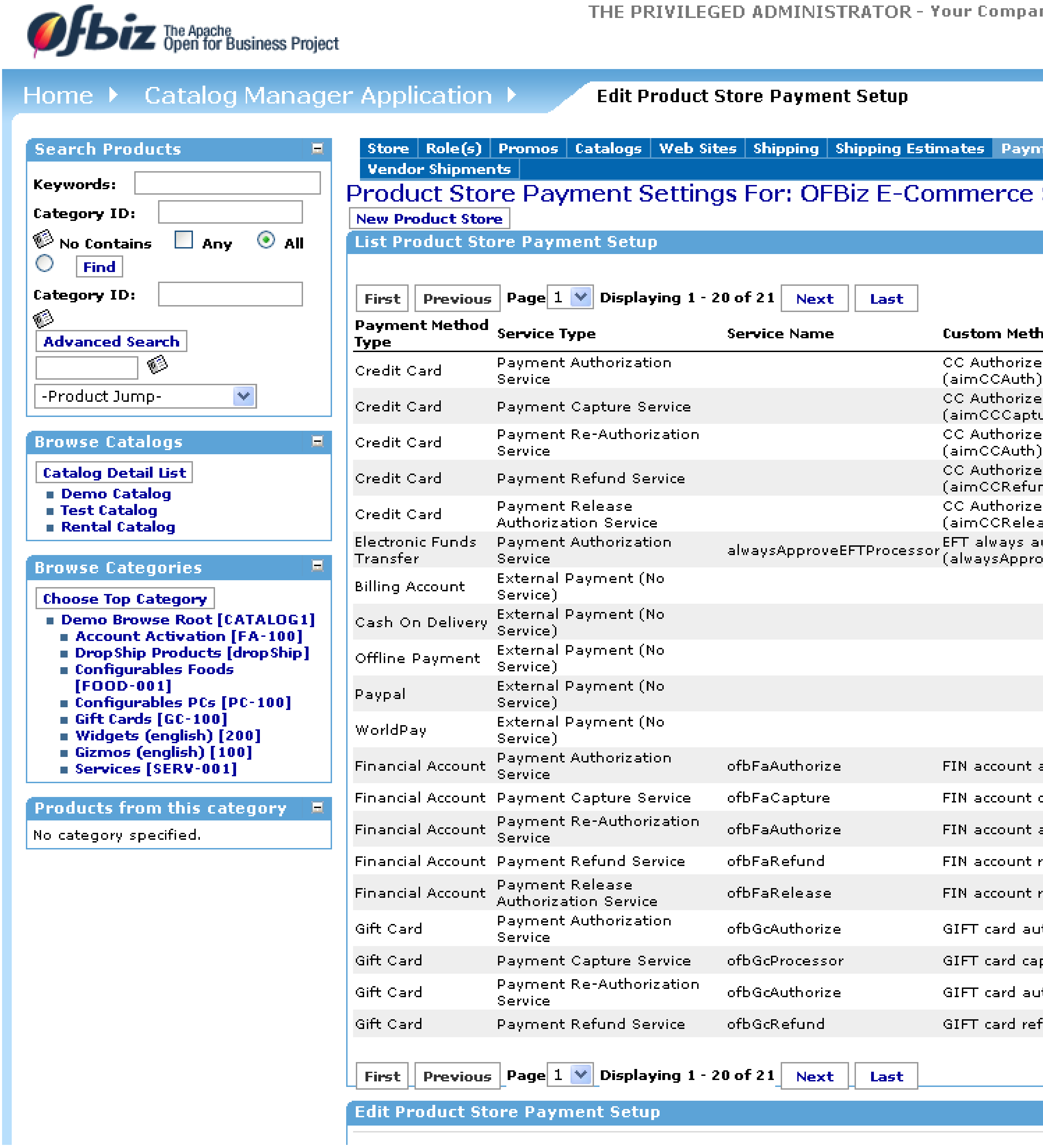
1. Go to Accounting - Payment Gateway Config and select "RBS WorldPay Payment Gateway" from the list

2. Please fill all those fields to made working correctly to work with RBS WorldPay:

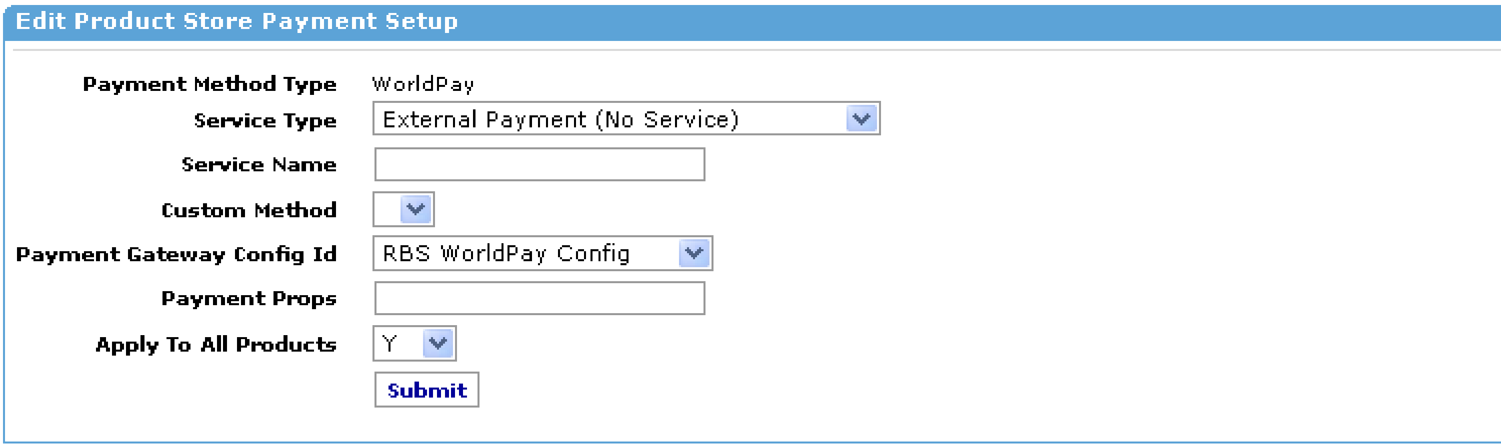

Redirect URL : Test/Production Redirect Url

Worldpay Instance Id : Your Worldpay Instance Id.
Authorization Mode : Full-Authorize / Pre-Authorize.
Contact details not-editable : Will displace contact info on WorldPay in non-editable format
Contact details to be hidden : Will hide the contact info completely
Currency drop-down to be hidden : Will hide the currency info
Shopper language Id : locale to be used
Suppressed Language Menu : if should the language menu to be suppressed.
Delivery Address Editable : if should the delivery address editable.
Test Mode : Approve/Cancelled/Live Mode.

3. Once RBS WorldPay Payment Gateway has been configurated you have to go to Catalog - Stores - select your Store - Payments tab



4. Edit the Payment Method Type Credit Card and after selected a Service Type (Authorize, Capture, ...) you can choose the Custom Method related to the Service Type choosen and as Payment Gateway Config Id "RBS WorldPay Config".




As deprecated use you can alternatively change the configuration parameters into

`${ofbiz install dir}/applications/accounting/config/payment.properties`

Configure all the parameters starting with name "payment.worldpay" in payment.properties.

## Giftcards Setup

GiftCard creation:

1. The giftcard is enabled in the productstore in the catalog as a payment method with several parameters.
2. The productStore has a field called "Show Checkout Gift Options" this should be set to "Y"
3. In the entity 'ProductStoreFinActSetting' it can be set if the card requires a pinCode. By default in the demodata this is set to "N"
4. The giftCard can be bought or reloaded as product in the product catalog.
5. If a giftcard is purchased a financial account is created for the new giftcard in addition to an invoice and payment and ledger transactions. For this to work you have to activate the 'eca' createFinAccountTrans in accounting/servicedef/secas.xml

Using the Giftcard as payment:

1. The giftcard code which is listed in the financialAccount
2. If the card is used with enough balance the Order gets rejected.

## e-mail Settings

This page is used to configure the email messages to send for various events in the ecommerce system.

There is a record for each email in the system by default, but if there is an email that you don't want sent you can Delete the corresponding record here.

For those you do want to keep you will want to change the following fields for each email message, one at a time:

1. 2nd field, From Address, to your preferred customer contact email address
2. 4th field, Bcc Address, to any email address you would like to be copied on each email message
3. The other fields, like the 5th field, the Subject field, can be customized if desired.

If you want to modify any of the templates, we recommend that you copy the templates to your own location, change them there, then change the template locations on this page to point to your files.

### Survey Settings

This page is used to configure surveys that are used for various things in ecommerce including random polls that show up on the side bars, special product related surveys to gather additional information about specific products or products in specific categories, surveys associated with the customer profile, and so on.

The demo surveys here can all be removed, though feel free to look at each one to see if it or something like it might be nice to have on your site.

### General Settings Override

This page is used to configure product search keyword overrides. These overrides can redirect the user to a specific category, product, or OFBiz or arbitrary URL. For example, when a user searches for the word "gizmo" they are redirected to the Gizmos category (ID 100).

The demo data in place is just an example and should be removed to avoid accidental undesired behavior in product keyword searches on your site.

## Catalog, Category, Product Setup

### Catalog Setup

Rather than reusing existing Catalogs we will create a new one to associate with the Store we have been configuring, and it will be the only one associated with the Store (unless you want to create multiple Catalogs, of course).

To create a new Catalog:

1. Go to the "Main" in the Catalog Manager and click on the link labeled "Create New Catalog" near the top of the central area of the page.
2. Enter an ID for the Catalog in the Prod Catalog Id field (this cannot be changed later).
3. Enter a name for the Catalog in the Catalog name field.
4. Unless you know you want to use the special Quick Add categories in this Catalog, I recommend setting the Use Quick Add field to N.

5. The other fields are optional but can be used to customize the look and feel of this Catalog to distinguish it from others (if applicable).
6. Submit the form with the update button.

Once the new Catalog is created, go to the Stores tab and make sure this Catalog is associated with the Store we just configured.

While here, take a look at the Categories tab. We will soon be creating some Categories to use with this Catalog. There are many types here, but the main ones we will be concerned with are:

1. Browse Root (One): this category will be the parent category of all of the top level browse categories for the catalog. It will not be visible to the customer, but it's children will be the main or top-level browse categories.
2. Promotions (One): the products in this category are listed on the default eCommerce Main page. Of course, that page can be customized to show other things, but if you are using the default OFBiz ecommerce templates main page, you should create a Promotions category to configure which products will be displayed there.
3. Default Search (One): if a Default Search category is configured only the products in this category will show up in product search results. This category can also have Feature Categories and Feature Groups with it, and the Features in those groups will be used to populate the parametric search drop-downs on the Advanced Search page. Of course, when searching within a specific Category only the features associated with that category will be used for the parametric search drop-downs in the Advanced Search page.
4. Purchase Allow (One): if a Purchase Allow category is configured only the products in that category will be available for purchase when this catalog is active. In that case if a product not in this category is put in the cart an error will be shown to the customer. In general for easier maintenance it is best to have this set to the same category as the Default Search category.
5. View Allow (One): if a View Allow category is configured only the products in that category will be visible when this catalog is active. Other products will not show up in search results, category browsing, and if someone tries to view the product by ID it will report that no product is found for this ID. There is a performance impact associated with the use of this category, so alternatives might be desirable in certain circumstances. In general for easier maintenance it is best to have this set to the same category as the Default Search category.

## Category Setup

As described in the Catalog Setup section there are various basic Categories that we need to create for our new Catalog. We will create four categories:

1. A Browse Root Category
2. A top-level browse Category to be a child of the browse root category
3. A Promotions Category
4. An "All Products" Category that will be setup as the Default Search, Purchase Allow and View Allow categories for our catalog.

To Create a Category:

1. Go to the "Main" in the Catalog Manager and click on the link labeled "Create New Category" near the top of the central area of the page.
2. Enter an ID for the Category in the Product Category ID field (this cannot be changed later).
3. All of these categories can use the "Catalog" setting for the Product Category Type field.

4. The other fields can be set, but are not necessary. Note that Category hierarchies do not use the Primary Parent Category field, instead they are done with the Rollup tab once the Category is created.
5. Submit the form by clicking on the update button.

Once the Category is created go to the Content tab and look near the bottom of the page in the Override Simple Fields section to set a Description, and if desired also a Long Description.

For each of the categories that we are creating, go to the Catalogs tab in the Category section, or the Categories tab in the Catalogs section and associate them using the appropriate type(s) as described above.

For the top-level browse Category that will be a child of the Browse Root Category associate them using the Rollup tab for whichever one you create second. Both parent and child categories can be setup there.

## Product Setup

Congratulations, you are finally to the point where you can start setting up products....

To create a Product follow a process similar to those described for other things, like Categories.

1. Go to the main page of the Catalog Manager and click on the "Create New Product" link.
2. If you fill in an ID it will make sure that ID is valid, and if so it will use that one. If you specify no ID it will generate one.
3. Set an Internal Name that makes it easy for you to recognize the product. This name will be shown in the admin tools, but not to the customer.
4. Note that if you are using the UPS or USPS or other online rate estimation utilities then you must have values in the "Weight" and "Weight Uom Id" fields.
5. Submit the form to create the product.

Add Content to the New Product

1. Click on the "Content" tab/button for the product you just created. Here you can setup text and images for your product.
2. You will see some forms at the top for administering managed content (ie from the Content Manager) with the product. For more advanced product related content needs use this, but for more common and simple needs, this can be more difficult to administer and slower at run time.
3. Near the bottom of the page is a section labeled "Override Simple Fields". Here you will typically want to specify a Product Name, Product Description, and Long Description. If you have images to associate with the product, you can specify their locations here, or upload them. Note that there are default locations for the images (can be quickly set by clicking on the "[.jpg]" or "[.gif]" buttons). We recommend using these locations, but of course you can put your images anywhere. These can be an absolute URL, or will be relative to the current server address, or the content URL prefix if one is specified in the url.properties file.

Add Prices to the Product

1. Product pricing in OFBiz is very flexible. There are two main aspects to it: Prices and Price Rules. This is independent of promotions, which are applied after the price calculation is done.
2. For basic operation you should have at least one type of price setup for each product: the Default Price. This is the price that is used when no rules apply.

3. To add a Default Price go to the Prices tab for the Product, and use the form at the bottom of the page.
    a. The Product Price Type Id should be "Default Price", the Currency Uom Id should be whatever currency the price is in, and the Product Store Group Id can be left as Not Applicable, unless you are setting up multiple groups of stores that have different pricing.
    b. The From Date can be now or in the future, if you want the price to take effect in the future. The Thru Date is optional, but can be used to specify that this particular price expires at a certain date and time. Note that if there are multiple prices of the same type, etc that are active at once, it will use the one with the most recent From Date. This is useful when you want a temporary price to override the normal "Default" price of the product.
4. If you are using price rules or may do so in the future you may also want to enter information such as the List Price and the Average Cost which are often used in the price calculations.
5. Note that if a Minimum Price is set the price will never be less than that. So, even if the Default Price is to 2.00 and the Minimum Price is set to 3.00, then 3.00 will be used as the calculated price. The Maximum Price setting works the same way as the ceiling for the price.

Make sure to put each product in a browse category, and in the All Products category so that it can be searched for, viewed, and purchased in your catalog.

Expert Recommendation: These are the basics, but there is a lot more information about products that you can, or may need to, setup. We recommend reviewing the more detailed documentation or engaging the services of an experienced consulting to help you through this.

Advanced Catalog Setup: Features, Promotions, Price Rules, Keyword Thesaurus, Features for special functionality or parametric search, Moderated (or unmoderated) Product Reviews, Configurable and Manufactured Products, Virtual and Variant Products, Inventory/Facility/Location settings, and so on

See the end-user documentation space for details on how to set these things up and what they mean. Also see this for more advanced options for Products, Categories, and so on.

## Accounting data organization and Setup

(field/entitynames in brackets[])

### General principles

1. The general ledger of ofbiz consists out of a list of 'ledger buckets = glAccounts' with a non meaningfull ID: [glAccountId] and a meaningfull code [accountCode] and a meaningfull name [accountName] Initially, in the demo data, the account id and code are the same. When reorganizations are required these codes can be easily renamed without changing the glAccountId.
2. The buckets are in a hierarchy where totals of the lower levels are added together and be shown at the higher levels, therefore every ledger bucket has a parent [parentGlAccountId]; with one exeption if the glaccount is a toplevel glAccount/bucket.
3. Every glAccount has a account type id [glAccountTypeId] with a organization dependent second default glAccountId [GlAccountTypeDefault.glAccountId] to be able for the system to create the double booking.

(Currently the system will do that always to "ACCOUNTS_RECEIVABLE" default glAccountTypeId for sales invoices).
4. Transactions are created for several reasons like posting of invoices or payments, inventory movements and workeffort costs.
5. GlAccount class is used for categorization and reporting.

## General Setup (accounting -> global GlSettings)

1. Company data and internal organizations
   demo file at: /applications/accounting/data/DemoOrganizationData.xml
2. All glAccounts are predefined [GlAccount] and can be viewed on the globalGlSettings->chartOfAccounts screen.
   demo file at /applications/accounting/data/DemoGeneralChartOfAccounts.xml
3. Load the Sales/purchase InvoiceItemType table and default glAccountId general setup for all organizations.
   demo file at /applications/accounting/data/DemoGlSetupData.xml

## Organizational Setup (accounting -> organizational settings -> setup).

1. The predefined glAccounts are assigned to an organization [GlAccountOrganization] on screen chartOfAccounts (this file can only be loaded and not changed)
   demo file at /applications/accounting/data/DemoGlSetupData.xml
2. if required override the invoiceItem type type assignement for a particular organization at the glAccountDefaults->SalesInvoice/PurchaseInvoice
3. Enter/load the payment TYPE GlType Mapping file [PaymentGlAccountTypeMap] at glAccountDefaults->PaymentTypeGlMapping
4. Enter/load the payment METHOD GlType Mapping file [PaymentMethodTypeGlAccount] at glAccountDefaults->PaymentMethodTypeGlMapping

## Creating ledger transactions.(to be completed)

1. Sales invoice
2. Purchase invoice
3. Incoming payment
4. Outgoing payment
5. Inventary adjustment
6. Workeffort costs

## Marketing overview

text now maintained within ofbiz, check http://demo.ofbiz.org/cmssite/cms/APACHE_OFBIZ_HTML#N200F2

# Chapter 3: OFBiz Security

This is a technical description to explain security in OFBiz.

The basics of the system are that there are security permissions which consist out of two parts separated with a '_' character. The first part is the application name and the second part is the action or operation. The application is normally the same as the component name (or webapp name in case of sub-component webapp) however in uppercase characters. The action can be anything however the most used are : VIEW, CREATE, UPDATE, DELETE and the special one called ADMIN which allows all operations.

An example is the security permission for creating a  order is ORDERMGR_CREATE, in this case the application is the ordermanager and the action is 'CREATE' to create an new order. This permission is contained in the 'ORDERENTRY' security group. So every user ID (userLoginId) which is connected to this group will be able to create orders.

## Security Levels

We currently have several systems/levels where this is implemented:

### At login level

In the file ofbiz-component.xml the base-permission is defined. The user who want to login needs to have at least the base-permission COMPONENT-NAME_VIEW or base-permission COMPONENT-NAME_ADMIN permissions. Most of the components have the values OFBTOOLS coupled with generally COMPONENT-NAME permission and this means that both are required to gain access to the component.

**Beware:** using comma as and operator is not obvious and has proven to be a source of confusion in the past.

### At the component menu level

It's pretty simple to use. The component top-level menu will only show the components to which a logged-on user has at least the WEBAPP-NAME_VIEW or COMPONENT-NAME_ADMIN permissions, i.e. the same as on the login level. This is done in appbar.ftl which defines which tabs are visible in the applications tabs bar.

### At the request (controller.xml) level

There are two important parameters here. Every request (<request-map) tag has a security (<security) tag with the 2 parameters: 'https' to define if SSL will be used for this request and the 'auth' parameter to define if a user needs to be logged on to execute this request. If he is not logged on the login screen will be shown and after a successful login AND if the security checking on the

other levels are successful, the request will be executed.

### At screen level

In the '<section' part of a screen definition and '<condition' tag the test with the '<if-has-permission' tag with the 'permission' and 'action' test can be performed. Depending on the outcome the '<widgets>' or '<fail-widgets>' can be shown.
You may also use <if-service-permission.

### At Freemarker template snippet level

The session variable *security* is always present in the screen context. You can use it to request security informations using Security class public methods: hasPermission, hasEntityPermission, hasRolePermission.

### At service definition level

This is a new function which allows the re-usage of services in other components with a different security schema. An example is the project manager component which uses many services of the workeffort component but has a different security schema.

In the service definition, (files in the servicedef directory) the '<permission-service' can be inserted pointing to a service which will check if the service is allowed to be executed. The input to this service is at least the 'main-action' parameter to specify the action (CREATE, UPDATE etc) but also any other input parameter such as a productId, or workEffortId as defined is the security service.

You can extend the base permission service using ECA rules on the permission service used by the service you want to reuse. Just have it run your permission service after the main one IFF the main one results in an error (failed permission check), and make sure your ECA rule has it put its results in the context if your security scenario succeeds.

A good basic implementation example is exampleGenericPermission in the Example component

### At service program level.

- Minilanguage.

  Using the <check-permission tag to check the access.

- Java.

  Using the org.ofbiz.security.Security API

### At record level

Defining a path from the Party in question to the target/desired entity through relationships. This is usually do-able and easy to do with a single view entity, and if a query on that entity with the proper constraints returns any results then you know the user/party has the permission.

See the catalog role limited permissions and how they are defined and used in the

ProductServices.xml file for an example.

### Role limited (or based) permissions (aka Party Roles)

The purpose of role-limited permissions is to tie a SecurityPermission to record level security using the RoleType/PartyRole and related entities. In OFBiz this is how record level permissions are done, i.e. somehow the user (through their Party record) is associated with another record in the database and that specific relationship must exist in order for the role-limited permission to take effect.

Good examples are in hasPermission methods in OrderServices class or how ProductStoreRole, ContentAndRole, PartyRole, entities are used in Java code (and at large ENTITY-NAMERole entities). See also checkStoreCustomerRole in ProductEvents class.

> By the way, do not confuse Security Roles (below) with Party Roles - they are entirely different.

### Security Roles

Security Roles provide a means to associate a user ID (userLoginId) with a particular OFBiz element. This may seem the same as Security Permission, but it is slightly different. For example: a user is assigned the ORDERMGR_VIEW permission, and is associated to a particular facility (let's say XYZ Company) with the ORDERMGR_ROLE_UPDATE security role. This combination would allow the user to view orders for all facilities, and update orders for the XYZ Company facility only. They may be seen as limiting permissions.

### Protected views

This is another mechanism which is used to protect from data leakage (data stolen from a login/password couple compromised). It works like the well known grey list anti-spam feature (aka tarpitting). It's pretty simple to use.

You define the views you want to protect under a Security Group using the Protected Views menu.

There you define the

- View name using uri attribute of request-map element (controller.xml file)
- Maximum number of visits (per period)
- Duration during which the visits are considered (in seconds)
- Duration during which the view will not be accessible (in seconds). This parameter defines the tarpitting period.

You don't have to define anything else for the protected views mechanism to work. If you don't define a "protect" response, in case of blocked screen, it will be rendered blank by default.

- But you may define a generic (per instance) "protect" response view which will be rendered by default using the default.error.response.view parameter in security.properties.
- Instead of only per request or per instance (setting in security.properties), you may also define a "protect" view by application using a <protect view="name_of_view"/> element in controller.xml. If the "protect" response is not found, first it will check for an application default before falling back to per instance.

The code use a simple strategy as we don't need something very sophisticated to trap malignants. It's all in ProtectViewWorker.java.

## Data model

All these levels rely on several database tables:

1. SecurityPermission: the lowest level where all basic permissions are defined. Typically used to set up the standard permissions (_ADMIN, _CREATE and _DELETE). If there is a need, the same set of permissions may be created with a "_ROLE" in there. Examples are: CATALOG_ADMIN, CATALOG_CREATE, CATALOG_DELETE, CATALOG_ROLE_ADMIN, CATALOG_ROLE_CREATE.
2. SecurityGroup: where the permission group is defined. For setting up groups that typically have blanket permissions. FULLADMIN and PARTYADMIN are examples.
3. SecurityGroupPermission: permissions are grouped together in this table. Associates SecurityPermission with SecurityGroup.
4. UserLoginSecurityGroup: Which userLogin id's have access to which permission groups. This is where parties can be associated with SecurityGroup. Note: Parties are associated with SecurityGroup by their userLoginId, but when adding a party to an entity role entity, the partyId is used. This is a little confusing (especially if I have it wrong *Al Byers's note*).
5. PartyRelationship: security groups can be set for certain party relationships.

6. ENTITY-NAMERole (OrderRole, PartyRole, etc.):

   The org.ofbiz.core.security.OFBizSecurity class contains methods for applying/using these tables.

   Here is some stuff that David wrote in an email that shows 2 cases where group permissions are used:
7. has CONTENTMGR_VIEW (or CONTENTMGR_ADMIN, handled by hasEntityPermission method)
8. has CONTENTMGR_ROLE_VIEW (or CONTENTMGR_ROLE_ADMIN) and partyId of current userLogin is associated with the Content in the ContentRole table (in this case with any roleTypeId) (see Content management security)

## Notes

- In an exchange with Anil, David did not recommend to use Security class public methods (hasPermission, hasEntityPermission, hasRolePermission) but to rather use the pattern used in the ProductServices.xml#checkProductRelatedPermission method
- There is also the check-role-member attribute usable in required-permissions element (mini-lang) but I did not found any usages of it in XML services files.
- The predefined security permissions can be found in the SecurityData.xml file and in the xxxxSecurityData.xml (xxxx = component name) files of each application. Look for these elements: SecurityPermission, SecurityGroup, SecurityGroupPermission, and UserLoginSecurityGroup. In addition, the PDF files attached to this page list default security permissions and groups (2004).
- Securing the OFBiz Installation: OFBiz is preloaded with user login IDs and security permissions - which provide a 'back door' for hackers. Be sure to secure your OFBiz deployment before going online by following [these instructions|.
- Also you may check this history link from where some informations in this page and children pages are coming.

- Carsten Schinzer has provided an Overview of Permissions & PermissionGroups (he called PermissionGroups Roles) with relation with demo Userlogins. If interested see OFBiz Roles.ods in attachment (Open Office Calc document)

Children Hide Children | View in hierarchy

Content management security (not reviewed) (OFBiz Technical Documentation)

Data Driven Security (not reviewed) (OFBiz Technical Documentation)

How to secure your deployment (OFBiz Technical Documentation)

Notes on security by David Jones (OFBiz Technical Documentation)

Security Services - Developer (OFBiz Technical Documentation)

## Content management security (not reviewed)

In content management security must be more flexible than in more static applications. I am going to start the example of an online newspaper because I think relating discussion to something that you can relate to is a good idea. In this case, the will be multiple newspapers hosted and maintained by the same company and workers (not talking about editors and reporters, but system admins).

The system admins could have scope over all the newspapers or they could be assigned to just one paper. In the case that they have global permissions, those sysadmins could be made part of the ALLNEWSADMIN group and in SecurityGroupPermission, ALLNEWSADMIN group would be given CONTENT_ADMIN permission.

There ought to be a place for CONTENT_ROLE_ADMIN permission to handle selective admin privileges. I think this would be tied to the ownerContentId field of the Content entity. This would point to a Content record that topified the OSS News Journal paper. To that record, an entry in the ContentRole table could be made that tied it to the CONTENT_ROLE_ADMIN roleTypeId and the OSSADMIN group. I am not sure about the OSSADMIN groupId going in the partyId field of ContentRole. Upon looking at OFBizSecurity.hasRolePermission, there is a "hasEntityPermission" check that adds _ROLE to the action (BTW, this is inverted from the way that SecurityPermissions are defined and probably would not work), but I don't see how that would tie a role permission to a selected set of content. The rest of the hasRolePermission seems to use the partyId from a userLogin and I don't see how that would tie _ROLE type to a SecurityGroup.

I will investigate if no one removes the confusion for me.

Quick Public Mode

For Content Managment, there is another mode for giving public access (or role controlled) to content.

ContentPurpose table identifies content in more context oriented ways than the ContentType. ContentType has values like "ADVERTISEMENT", "MESSAGE", etc - not very specific. ContentPurpose (also has ADVERTISEMENT and ARTICLE, but it will get more specific) will have entries that are more specific, such as "FEEDBACK", "TO_BE_FIXED", etc.

ContentOperation identifies the operations that can be performed on a piece of content. Note that with Content, it is not just a matter of create, update and delete. A lot of CM permission control is about what content can be attached (via ContentAssoc) to other content, so someone may be able to add a note to content, but they could not change it. Perhaps only the author can change it or no one can because a change history is required. The ability to actually perform an operation is granted within service event code.

ContentPurposeOperation ties Operations to Purposes. There is an extra field, roleTypeId, which I asked for, but now I am not quite sure how it is applied. If roleTypeId equals "*NA*", then the operation is public for any Content that has the associated Purpose type attached to it. But if there is a roleTypeId such as "CONTENT_PROOF_EDITOR" in the record, then only someone who has that roleTypeId associated with their partyId in PartyRole could perform that operation on the content. How does that sound?

Content Specific Permissions

Perhaps the best test case for permission control is that case where a reporter wants no one but him or herself to an article while s/he is working on it, wants only his managing editor to see it when he is done, want the proofers to see when it is approved and then anyone can see it when it is published.

It seems that the Content.statusId field would be important in this case. If it were set to "DRAFT", then the control code would not let anyone but the person identified in the createdByUserLogin field to see it.

If the reporter wanted a colleague to see it while it was still in draft mode, then he could attach a ContentRole entity to it that has "CONTENT_FEEDBACK" roleTypeId and the colleague's partyId. Then that reviewer could attach Content with the PurposeType "COMMENT" to the document, but he could not change it.

The ownerContentId of this record would point to a Content record with contentTypeId="OWNER". There the reporter could grant permenant permission to this reviewer by attaching the same ContentRole record.

In the OWNER Content.ownerContentId field, another id could point to an owner with higher authority. If that owner gave "CONTENT_FEEDBACK" permsission to himself or someone else, then any reporter whose OWNER record pointed back to that supervisor would have that person as a reviewer and they would have no ability to revoke that privilege. This, of course, is just how I am saying the newspaper should be set up. There is nothing in the base CM code that implements this.

This is all I feel like doing right now. Anyone feel free to pickup where I left off or to change things. I will come back soon, I think --Al Byers

## Data Driven Security (not reviewed)

*Al Byers:* I hope it is all right to use the wiki to brainstorm ideas. As I was writing my other wiki, I realized that this idea needs exploring. I believe I will type the ideas here and then remove the wiki if it goes nowhere. But since this should be discussed on the ofbiz-devel list, I will probably end up posting it there.

As I work on content menagement, it seems that granting the proper permissions will be the most difficult part. David J. came up with the ContentPurposeOperation idea which ties public permission to the ContentPurpose. I added the idea of including roleTypeId so that permission could be given to those associated with the proper RoleType.

Now I am wondering if we expanded the ContentPurposeOperation table (most likely start another and leave that table for simple public access grants) if we could handle 80% of most permission granting by filling in data tables. I think the table would require the following fields:

**toPurposeTypeId** This is for the content to which the current (from) content would be linked. It would be null if the operation is only operating on the current content.

**fromPurposeTypeId** The current Content purpose. Same as the one in ContentPurposeOperation.

**assocTypeId** This is the type of the connection between the two contents. Really is a "purpose" identifier.

**toStatusId** The status of the "to" content will have a lot to do with what is allowed to operate on it. Using the newspaper scenario, the permissions will change on an article depending on whether it is in the draft, approval, proof or publish stages.

**roleTypeIdFirst** the PartyRole table will be checked to see if the RoleType is associated with the user. Then the fromContent or current content's ContentRole associations will be checked.

**operationTypeId**

I am thinking that there are only a handful of operations - create, update, delete, attach, deattach. Attach and deattach refer to associating other content with the target content.

More to come.

## How to secure your deployment

This come from this HUarchiveUH, I copied and updated it here to be sure to have this always on hand.

This is an outline of a few steps that should be taken to ensure that live deployed OFBiz systems do not leave open access for others to abuse.

It is not the intention to provide security advice on specific application servers as they are best researched elsewhere.

- If you loaded the default data ensure that you have changed the passwords or disabled the user logins for the following:
  - admin
  - flexadmin
  - demoadmin
  - ltdadmin
  - supplier

To do this, use the Party Manager (http://<host:port>/partymgr). Log in as an administrator if necessary. Click Find All to find all parties. Click on desired party. Scroll down to user names and click edit on desired ID. You should ALWAYS change the password and optionally disable the account from there. If you choose to disable an account, be sure and leave the disabled date blank. If a disabled date is present, the account will automatically be re-enabled 30 minutes later. (This behavior is determined by the value for login.disable.minutes which is located in components/security/config/security.properties)

- Shut down unused webapps.
  OFBiz comes with a number of webapps that you may not need. You may wish to shut them down to save resources and to deny possible methods of attack.
  To do this you may,
  - edit base/config/component-load.xml and comment out the unneeded lines.
  - If you need ressources in those components but don't want to make them available to user simply put app-bar-display="false" in the webapp section of corresponding ofbiz-component.xml files.

There are a few more things you should probably do:

- Change the port from 8080 to 80
- Possibly add or move a webapp to respond to "/".
- This is now also in the system "Started BeanShell telnet service on 9989, 9990, BeanShell service ports are not secure. Please protect the ports" and requires attention for deployment!
- This page coumd not be uptodate to the latest version of OFBiz at all times therefore you should always be careful and check your system for other possible holes.

To think about:

- Should the default data be changed to disable all the user logins except "admin"?
- Maybe generate a "production" script to modify and/or remove these logins for a production site Add a brief description (or a link to one) of each webapp to assist the user to determine which ones they need and which ones they don't.

# HowToSecureYourDeployment

This is an outline of a few steps that should be taken to ensure that live deployed OFBiz systems do not leave open access for others to abuse.

It is not the intention to provide security advice on specific application servers as they are best researched elsewhere.

- delete/rename the file "install.jsp" found in webtools/webapp (2.1) or components/webtools/webapp/webtools (3.0) and restart OFBiz. (24/Jun/04 - install.jsp no longer exists as data is loaded via command line)

  *The file provides access to load the default data, which can be used to reset passwords and generally cause havoc.*

- If you loaded the default data ensure that you have changed the passwords or disabled the user logins for the following:
  - admin
  - flexadmin
  - demoadmin
  - ltdadmin
  - supplier

  To do this, use the Party Manager (http://<host>/partymgr). Log in as an administrator if necessary. Click Find All to find all parties. Click on desired party. Scroll down to user names and click edit on desired ID. You should ALWAYS change the password and optionally disable the account from there. If you choose to disable an account, be sure and leave the disabled date blank. If a disabled date is present, the account will automatically be re-enabled 30 minutes later. (This behavior is determined by the value for login.disable.minutes which is located in components/security/config/security.properties)

- Edit webtools/webapp/main.jsp (2.1) or components/webtools/webapp/webtools/main.jsp (3.0) and remove text about default user and password and the bottom two paragraphs about installing default data via install.jsp (24/Jun/04 - install.jsp no longer exists as data is loaded via command line).

- delete makebogodata.jsp from components/ecommerce/webapp. *(Don't think this is accessible, maybe it should be removed or moved into components/webtools/webapp, a potentially more secure area for data loading testing. Maybe even make it an option in install.jsp!)*

- Shut down unused webapps.

  *OFBiz comes with a number of webapps that you may not need. You may wish to shut them down to save resources and to deny possible methods of attack.*
  To do this, edit base/config/component-load.xml and delete or rem out the unneeded lines.

If you are using the embedded version of Jetty for your HTTP server/servlet container, there are a few more things you should probably do:

- Change the port from 8080 to 80
- Possibly add or move a webapp to respond to "/".
- This is now also in the system "Started BeanShell telnet service on 9989, 9990, BeanShell service ports are not secure. Please protect the ports" and requires attention for deployment!
- I've not been able to maintained this page to the latest version of OFBiz at all times therefore you should always be careful and check your system for other possible holes.

To think about:
Should the default data be changed to disable all the user logins except "admin"? Maybe generate a "production" script to modify and/or remove these logins for a production site Add a brief description (or a link to one) of each webapp to assist the user to determine which ones they need and which ones they don't.

## Notes on security by David Jones

The following notes have been taken from a mail David Jones posted to the dev list on 27/04/2006 in a thread with subject "Party Application"

The larger domain of security is split into 2 categories in OFBiz:

1. application/functionality level security
2. data level security

Category #1 (UserLogin-driven) doesn't know about anything except the UserLogin, the permissions checked for different screens, services, etc, and the SecurityGroup structure that maps between them.

Category #2 (Party-driven) can be combined with #1, usually with special "role limited" permissions that when checked require not just the permission, but some relationship between the Party and whatever records are concerned by the screen, service, or whatever.

It should be possible (in theory, I haven't tested it...) to use the Category #1 security without the party component, but #2 is very dependent on the Party data model and whatever data model relates to it for the required relationships.

This is the general design. What exists OOTB in OFBiz has various examples of both, but no attempt has been made to create a comprehensive or at least "generically complete" set of security settings in either style #1 or #2. Si Chen, et al have put some effort into more granular permissions for style #1, and that is quite helpful.

While much more effort for something like this is needed I'm still not totally convinced of the usefulness. I don't think I've worked with any 2 clients that had the same staff structure and desire for the same set of permissions, though certain ones do come up now and again or could be reduced to a more granular set of permissions that both could use. Whatever the case, this is an area of customization that tends to be pretty complex and there is as much variety in it as there are combinations of relationships of entities in OFBiz.

## Security Services - Developer

Overview: The OFBiz Security services control access to various parts of the application. The security services are built upon user login IDs, security permissions, security groups, and roles.

Be sure to read Security Administration before proceeding any further.

Security Services are not the same as Login Services - although the two are related.

OFBiz Security Services are divided among a handful of Java classes and related entities. The service that checks a user's permissions is extended from the abstract class org.ofbiz.security.Security. A number of other classes are used to create, modify, and delete user permissions - they can be found in the org.ofbiz.securityext package.

OFBizSecurity: This is the default security service. It handles checking a user's permissions and it is used throughout the application. It can be replaced with a custom security service - see below.

The securityext Component: This package of classes provide services for creating, modifying, and deleting user permissions. All security information is stored in the database.

Configuration Files: Two files are used to configure OFBiz security: components/security/config/security.xml and components/security/config/security.properties. The security.xml file contains a list of security services that are available. The security.context property in security.properties selects which service is currently in use.

Implementing A Custom Security Service: The default security service in OFBiz can be easily replaced with a custom service. Basically, it involves 3-4 steps:

1. Write a custom security service class
2. Add the custom security service to the list of security services found in security.xml
3. Modify security.properties to use the custom service
4. (Optional) Modify the securityext component

You can write your custom security service class by extending it from org.ofbiz.security.Security or from org.ofbiz.security.OFBizSecurity. Extending from abstract class - advantage is you have the whole service written the way you want, disadvantage is increased development time. Extending from OFBizSecurity - advantage is you have a working security service to build on, disadvantage is your modifications could break if someone changes the superclass. By the way, modifying OFBizSecurity itself is NOT a good idea.

Once the custom security service is developed, add it to the list of services in components/security/config/security.xml. Follow the guidelines in the xml file.

Finally, enable the custom security service by changing the security.context property in components/security/config/security.properties.

If your custom security service requires new entities, then you'll need to modify the securityext component to accomodate them.

# Chapter 4: Party Manager

## .1 Introduction to Party Manager

The Party Manager administers information about Parties. Each party is given a specific Party ID; groups of parties are assigned a Group ID.

A 'Party' is a person, a company, an organization or a group of parties. Sometimes a party is described as a vendor, an employee, et cetera, but these are just 'roles' that a party may be associated with.

### .1.1 Conventions in this document

Within this document you will notice several conventions used to reduce the need for explanatory text.

[brackets] surround labels seen in the application which initiate an action or take you to another screen.

(Parens) within a list denote characteristics of a field such as (radio buttons) or (drop-down box).

* indicates a required field.

>> means that the action to the left leads or takes you to the result on the right. For example: [Show All Records] >> Table of parties means that if you click on [Show All Records], the next screen seen will be a Table of parties.

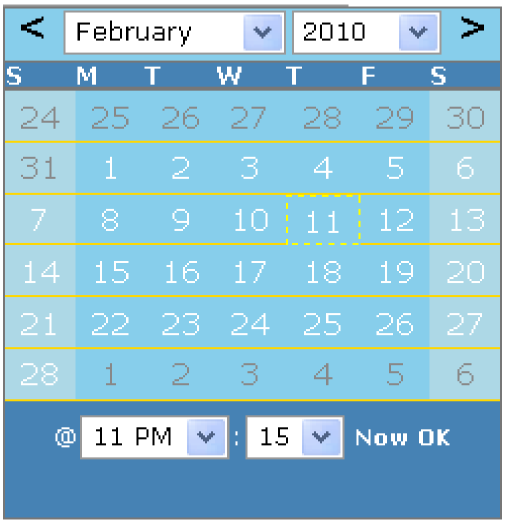
Outline presentation is used to denote subordination for greater detail.

#### .1.1.1 Link Buttons

Link Buttons are the areas on a screen which are Active as links to an action or another screen. They usually show up as colored letters or in small boxes or bracketed like [this].

Most of the Link Buttons are collected into an item called 'link buttons' which generally is positioned immediately following the screen capture of the active screen where those buttons are found.

## .1.1.2 PopupCalendar


## .1.1.3 Popup Calendar

Most of the date fields in the Party Manager (in fact, throughout OfBiz) provide a popup calendar which allows you to find and click upon a viewed calendar date. The time is usually defaulted to the current time, regardless of date; that can be edited later if need be. However, when the date is to entered manually, you will see the format specified to the right of the box. Usually the format will be yyyy-MM-dd.

To change to a previous year, click on the << button.

To change to a previous month, click on the < button.

To change to a future month, click on the > button.

To change to a future year, click on the >> button.

As soon as you click on the date, the date (and possibly the time) will be entered into the field associated with the popup calendar.

To cancel the calendar without entering a date, click on the X in the upper right-hand corner of the popup.

### .1.2 Discussion of the Tabs

Each Manager within the Business Application portion of OFBiz is selected by a tab. When you click on the Party tab, you are taken directly to the Party Manager Application. There you also have six functional tabs displayed: Find, Create, Comm, Visits, Classifications and Security. Each of these functions is explained below.

### .1.3 Links from Other Managers

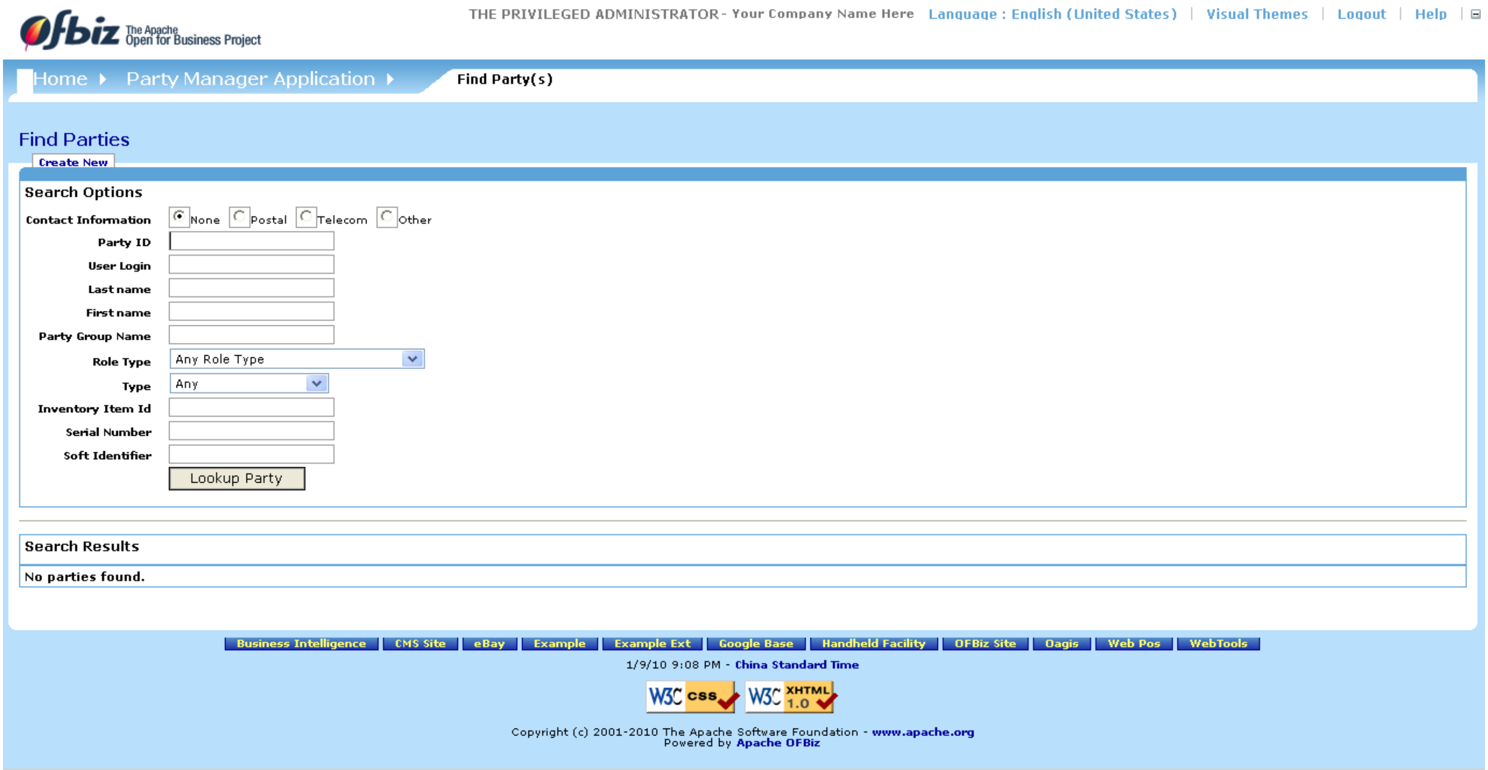
You will be brought to the Party Manager function from other functions as needed to create new or modify existing parties. For example, when a new or modified Contact Mechanism is needed, the Create New button will call up the appropriate screen within Party Manager.

## .2 Main

### .2.1 Discussion

The Main tab automatically defaults to Find. You may have your Main tab programmed to provide specific shortcuts within Party to common actions, such as User Logins for Security Group, or Create New UserID. Most features and functions within OFBiz can be modified to suit your needs.

## .2.2 FindParty



# .3 Find

## .3.1 Find - a Discussion

This function will be used whenever you need to work with a party (individual or group) and do not have his ID number.

Once the Party is identified, you can obtain all the information available in the database about the party. You may also update the data associated with the party: a change of address, an update to a customer's credit card number, etc.

NOTE: The Party you find here is then maintained through the system as you select another function - [Role], [Communication], [Contact List], etc., or another Tab - Visits, Security, etc. Come back to Find to identify another Party for working in any of the other functions of the Party Manager.

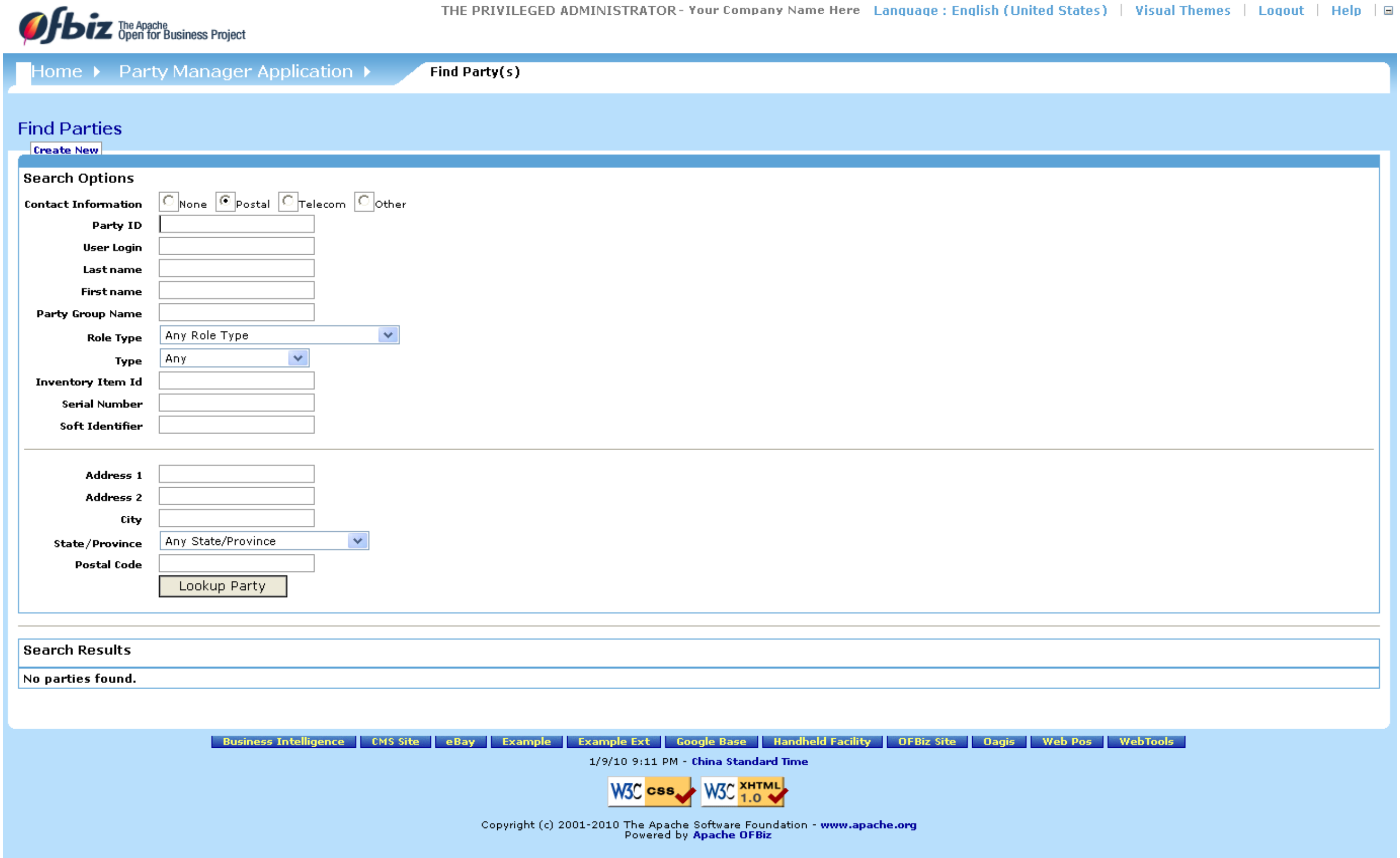
## .3.2 Find Party

### .3.2.1 Discussion

The objective here is to obtain a specific Party ID number or to get to specifics about a party. You may search by ID number or the LoginID, his name, or any of the fields shown. After entering what you know, click on Lookup Party(s) and all parties matching the entered criteria will be returned.

For example, if you only know that the party's last name is Jones, enter Jones in the Last Name field and then click [Lookup Party(s)]; every Jones in the system will be displayed in a table. From the table you might be able to discern which Jones you needed to find. Search fields vary depending upon the Contact Info radio button selected; the default is None. Contact Information means what primary means are used to get in touch with the party. If you know his phone number but not his city, click on Telecom and enter the number, for example. Below we list the fields included in each of the 4 contact categories.

## .3.2.2 findparty-post




## .3.2.3 link buttons

[Lookup Party] [Show all records] [Create New] [Show / Hide Lookup Fields] [Lookup Party]

## .3.2.4 Contact Info

The working fields below are selected by Radio buttons. Default is None, meaning there is no information provided for address, phone number nor for electronic contact means.

## .3.2.4.1 None

None means that there is no contact information known. Only the following fields are available to search for the party:

### .3.2.4.1.1 Party ID

This is the primary identification number or name used in the System to uniquely identify the person, party or group. It could be just letters, as in <i>admin</i>. It could be a 5-number set automatically generated by the system, such as 10030.

The system will accept partial User IDs as in Last Name. You may enter the partial User ID of '101', and it will return a list including 10101, 10102, 10103, ....

If you already know the Party ID, your search is easy. Put in those letters or numbers or combination (<i>John32</i>), click on the link [Lookup Party], and you have them!

### .3.2.4.1.2 User Login

When someone (a Party) logs into the System, they might be entering as a customer, as the senior Administrator, as the Blog Editor, in any of their different Roles. By having a different User Login, the system is able to respond to them appropriately.

For example, as the Administrator, they might have unlimited authority to make changes in the System, but if they tried to order products for delivery to their own home, the System might not have the address and account data associated with a Customer role. Each Role for a Party, then, should have its own User Login.

For the purposes of Search in the Find Party function, however, User Login might be remembered while Party ID was forgotten; using the User Login you might be able to find the Party in this instance.

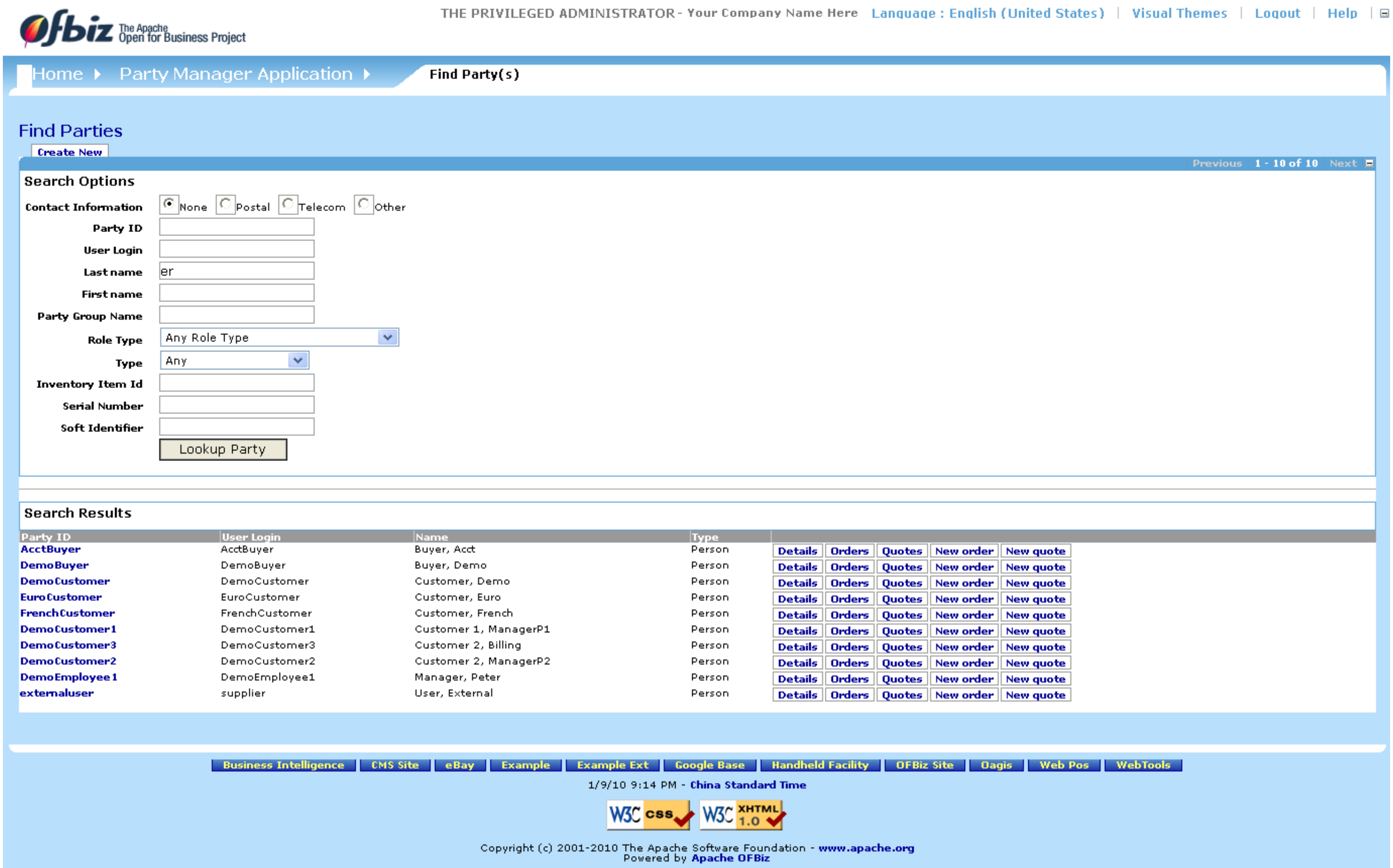
### .3.2.4.1.3 Last Name

Also known as the Family Name.

If you enter only a few initial letters, the system will return all instances of those letters in that sequence. For example, with 'er' entered, every last name containing an ER is returned, wherever that combination occurs within the name. This field is case insensitive. You could enter 'er', or 'ER', or 'eR' and the returns would be the same. See the following screen capture for the results of a search for 'Er'.

Results also depend upon whether the search is entered from the 'None' screen or 'Postal' screen, etc. If there is no Postal information about a Party, even if a Party exists, it will not be returned in a search on the 'Postal' screen. If unsure, search from the 'None' screen to avoid false negatives.

### .3.2.4.1.3.1 Found from 'Er' search




### .3.2.4.1.4 First Name

Doesn't have to be a real person's name. For example, if the Identity is Blog Editor, the First Name would be Blog.

### .3.2.4.1.5 Party Group Name

A Party Group is a collection of Parties. For example, MARKETING could be a Department in an organization, but it also includes all the members. Therefore, it is a Party Group as well, composed of the sum of all the individual Party members, each with their own Party ID.

### .3.2.4.1.6 Role Type (drop-down box)

Suppose you wanted to generate a list of all the employees in your company whose job title was 'Picker.' By selecting that Role Type and then clicking on [Lookup Party], the search tool would return a table of just those persons identified in the system as a Picker. The same could be done for any Type, such as 'Customer, 'Employee,' etc.

### .3.2.4.2 Postal

Same fields as None and adds the following:

#### .3.2.4.2.1 Address 1

Enter what you know of the first line of a street address.

Remember, this is a powerful search tool. To demonstrate, just enter the number of the address of someone you know is in the system. If I only put in '2700W', and click on [Lookup Party, it will return Fred Flatrock who happens to be at 2700 W 12600 S in Riverton!

#### .3.2.4.2.2 Address 2

This would be the second line of the Address. This might be something like 'Apartment 234.'

Remember that in a search, the more information you enter, the more specific your search results will be. If you can get the answer with just a little bit of information, entering more might be counter-productive. If you enter an error, it might keep the search tool from finding that which you seek because it is looking for that false bit of information.

#### .3.2.4.2.3 City

You could look for a list of all those whose address is in 'Riverton.' Enter that item only and your return will show all those there. If you want to find someone you know whose first name is Fred and whose address is Riverton, those two items are probably all you need enter to bring up Fred Flatrock of Riverton.

#### .3.2.4.2.4 State/Province (drop-down box)

Use the drop-down box to identify the larger geographical region. If the State and the person's name (first or last) is all that you know, you might still generate a list small enough from which to find the Party you seek.

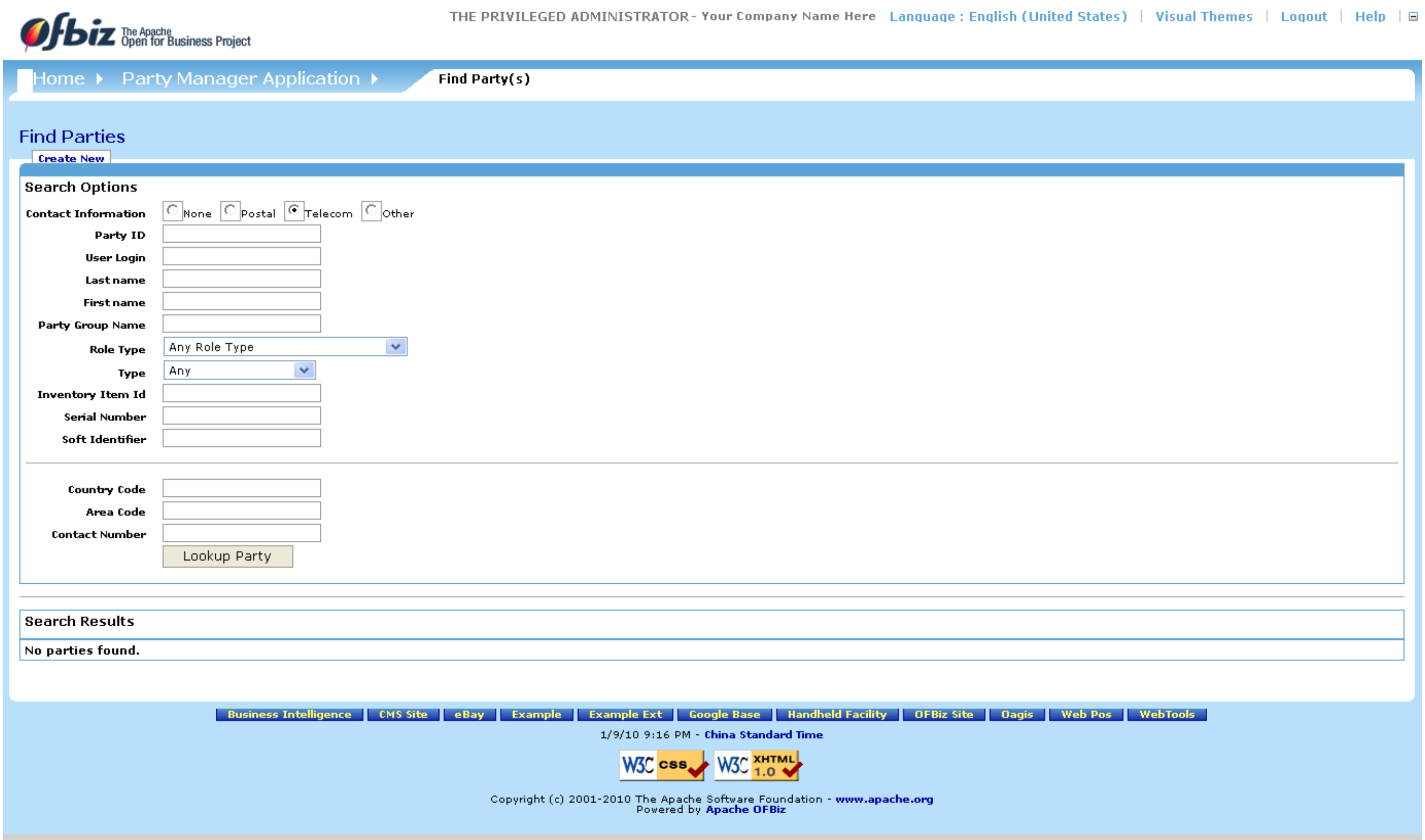
#### .3.2.4.2.5 Party Postal Code

Must enter the complete postal code; will NOT return finds from a partial code entered. For example, if the Zip code is 84065, you cannot look for codes ending in 65 or starting with 84. Be exact with this field.

### .3.2.4.3 Telecom

Same fields as None and adds the following:

### .3.2.4.3.1 findparty-tele



### .3.2.4.3.2 link buttons

[Lookup Party] [Show all records] [Create New] [Hide / Show Lookup Fields] [Lookup Party]

### .3.2.4.3.3 Country Code

Note that the Country Code is NOT the Area Code. Unless you are dealing with a customer base spread across several countries, this number is not needed. Area Code (the first three of the ten numbers usually used in the US) is entered in the next field.

### .3.2.4.3.4 Area Code

Be sure that the Area Code is entered into the second field from the left.

### .3.2.4.3.5 Contact Number

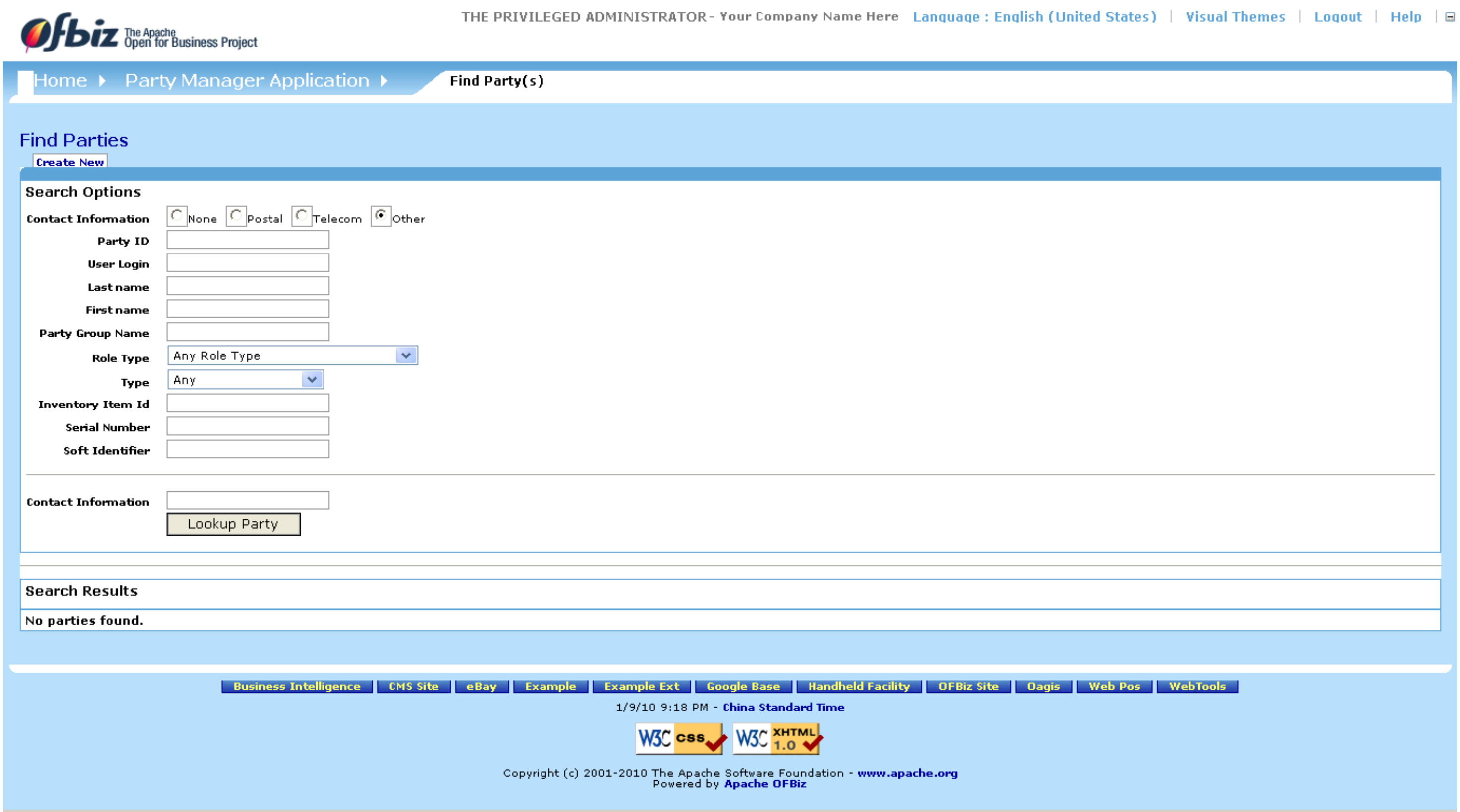
In this field enter all 7 digits (North America) without spaces or punctuation.

A phone number (together with the Area Code) is such a unique identifier that with this alone you should be able to find the party you seek.

### .3.2.4.4 CommonOther

Same as None and adds PartyContactInfoList. If the Party is the member of such a list, use that information here.

#### .3.2.4.4.1 findparty-oth




#### .3.2.4.4.2 link buttons

[Lookup Party(s)] [Show All Records] [Create New] [Hide Fields] [Show Lookup Fields] [Lookup Party]

#### .3.2.4.4.3 PartyContactInfoList

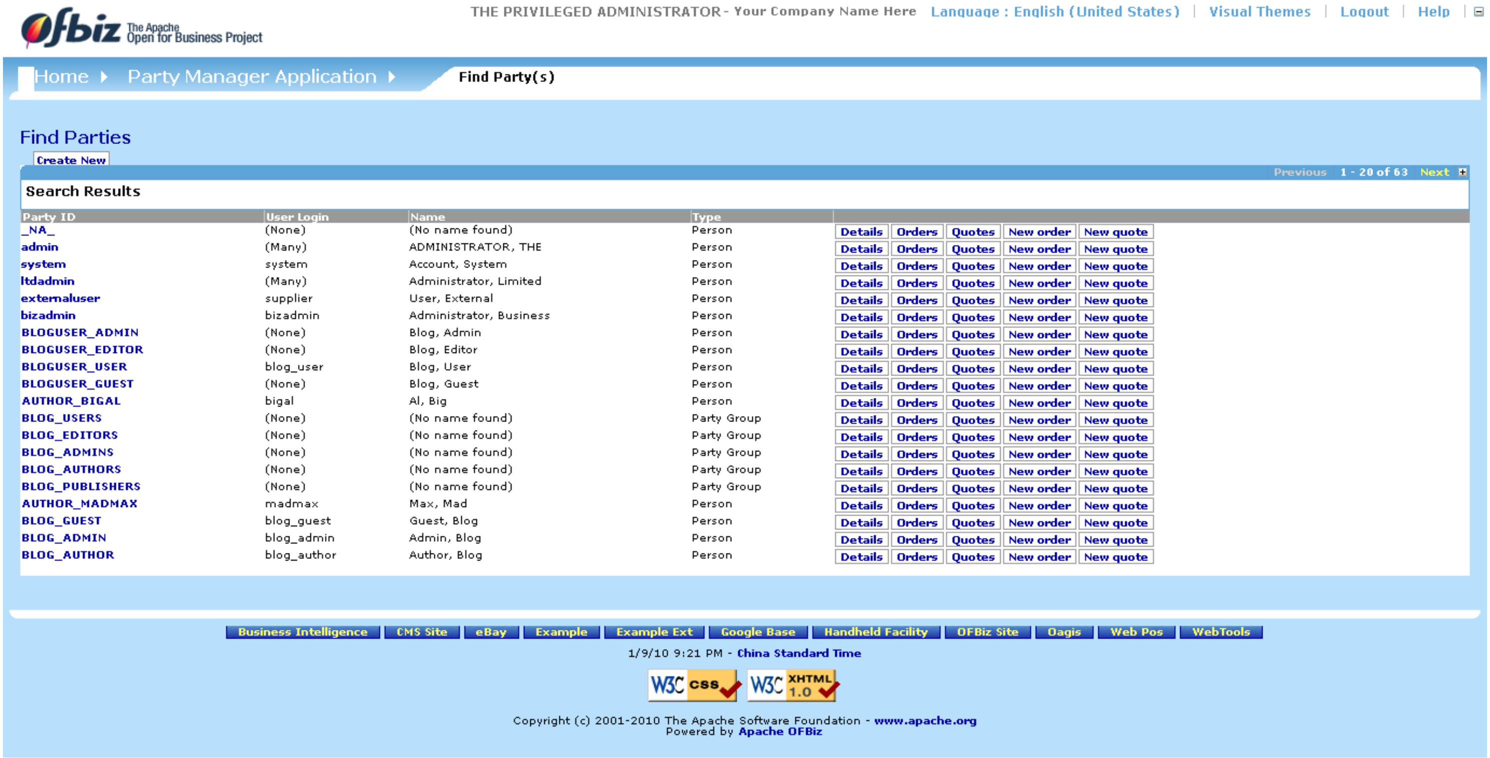
Enter the Contact List ID, or other information as requested in the top portion, then click on [Lookup Party].

## .3.2.5 Show all records link

### .3.2.5.1 Discussion

When you click on this link, all records are returned. No restrictions are imposed by any other inputs; every record in the system is returned.

## .3.2.5.2 showall




## .3.2.5.3 link buttons

[Details] [Orders] [New Order] [Show / Hide Lookup Fields] [Previous] [Next]

## .3.2.5.4 Discussion

Click on the User ID to be taken to the Profile screen for that party.

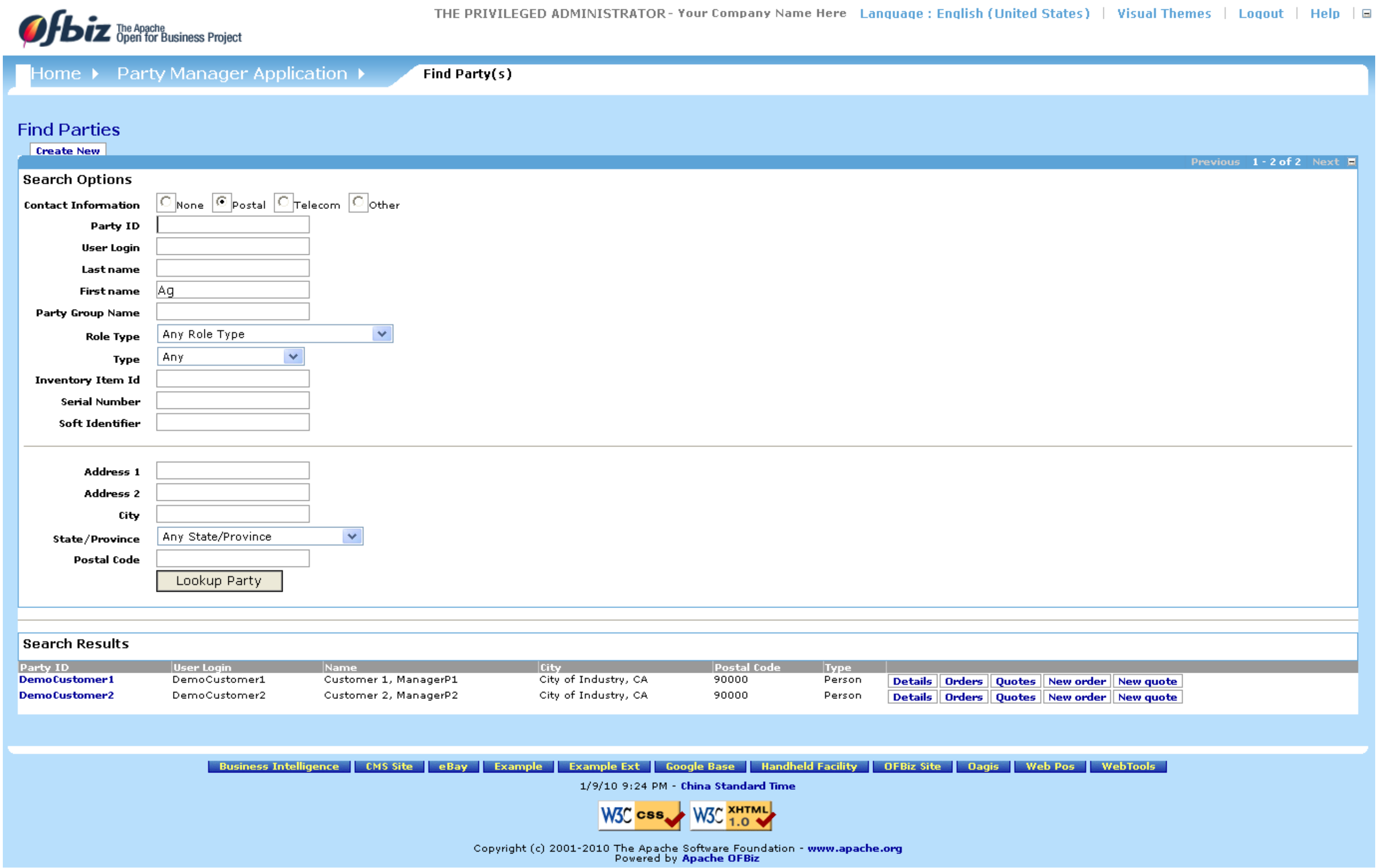
# .3.3 Party(s) Found

## .3.3.1 Discussion

1. Click on either the Party # or [Details] to get to the Profile for the party. The links to [Orders] and [New Order] open a screen in the Order Manager with the selected Party ID in place.

2. You can come here to the Party Manager, find your customer, and go directly to the Order Manager to create his new order. Or, you can go to a table of previously placed orders to work with an existing order.

## .3.3.2 findparty-found




## .3.3.3 link buttons

[Details] [Orders] [New Order] [Show/Hide Lookup Fields] [Previous] [Next] </B

## .3.3.4 Party ID

Click on this linked ID to be taken to the Party Profile screen.

## .3.3.5 User Login

This is what the party enters when logging into the system.

### .3.3.6 Name

Concatenated, this shows the 'Last Name, First Name' of the Party.

### .3.3.7 PartyPostalCode

Because the search was conducted under the Postal radio button criteria, this particular field is presented. A different field will appear for each of the other Contact Mechanism types.

### .3.3.8 Type

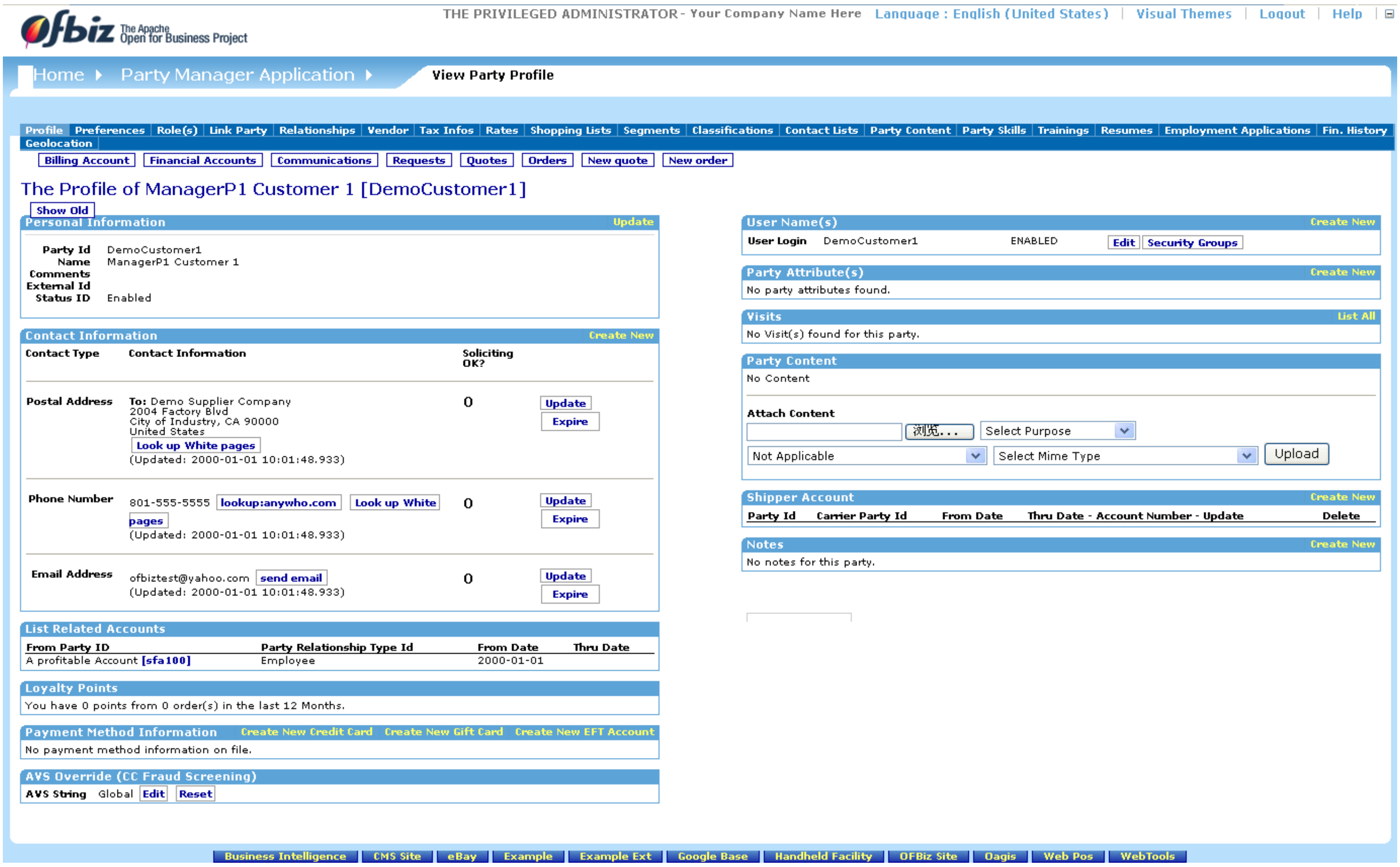
Generally, this means the type of Party - Person, Group, etc.

## .3.4 Profile sub-tab

### .3.4.1 Discussion

1. After you have found or created a new Party (person, group or customer), you come to this Profile screen. From here you select to add contact information, payment methods, and other details through the Update options. Also use Update to change or modify details.
2. Notice the other [bracketed] options available. For example, if a credit card or an address has become obsolete, click on [Expire] to remove that item. [Create New] is always there for adding another item in a category or to create a new party.
3. Which link buttons are available depends upon variations in the details included in the individual profile. For example, [send email] will not appear if there is no email address given.

## .3.4.2 viewprofile



## .3.4.3 link buttons

[Show Old] [Billing Accounts] [Orders] [New Order] [Payments Sent] [Payments Received] [Go Back] [Save] [Manual Tx] [Edit] [Expire] [Security Groups] [Update] [Send email] [Security Groups] [lookup:anywho.com] [lookup:whitepages.com] [Create New] [List All] [Create New Credit Card] [Create New Gift Card] [Create New EFT Account] [Profile] [Role(s)] [Relationships] [Communications] [Vendor] [Tax Infos] [Rates] [Shopping Lists] [Segments] [Classifications] [Contact List] [Update] [Create New Credit Card] [Create New Gift Card] [Create New EFT Account] [List All] [Edit]

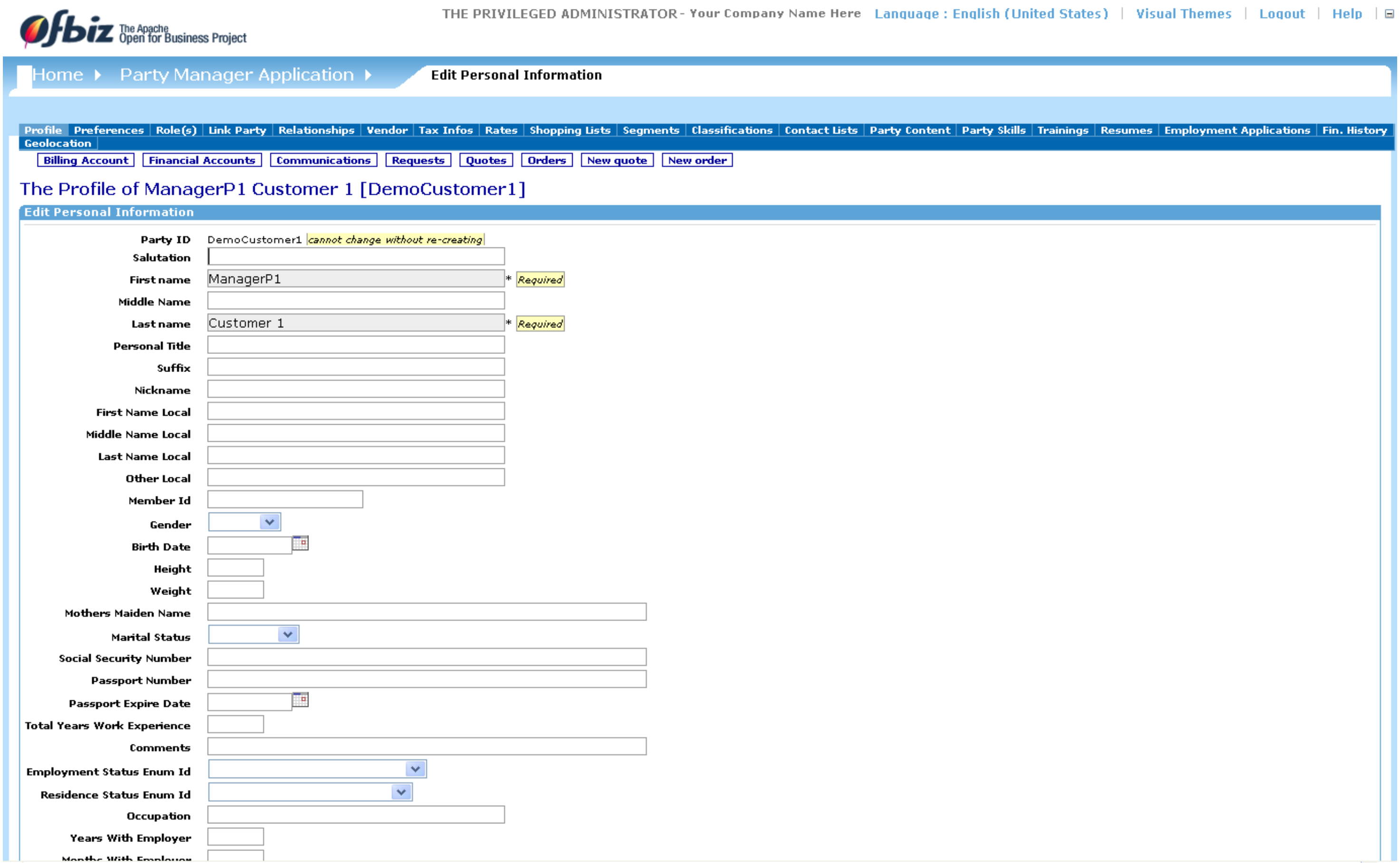
## .3.4.4 Update Personal Information

### .3.4.4.1 Edit Personal Information

1. You come to this screen by clicking the [Update] link in the Party Profile > Personal Information section. The nature of the information given here depends upon whether the Party is a Group, an Employee, a Vendor, or a Customer.

2. Click on [Update]. The original information is entered from the Create Party screen which is very similar. Here is where you will make changes or update any changed details. Other details, such as contact information, is entered at other screens which are accessed through the View Profile screen.
3. Note the word 'Personal' - these details are very private and inappropriate release could cause damage to your customers, employees or other party groups.
4. When finished, first click [Save]. When the screen returns a message that 'Person successfully updated.', click on the [Cancel / Done] link to return to the Profile screen.

## .3.4.4.2 editperson




## .3.4.4.3 link buttons

[Billing Accounts] [Orders] [New Order] [Payments Sent] [Payments Received] [Profile] [Role(s)] [Relationships] [Communications] [Vendor] [Tax Infos] [Rates] [Shopping Lists] [Segments] [Classifications] [Contact List] [Save] [Cancel / Done]

## .3.4.4.4 Party ID

Cannot be changed. This is the unique identifier for this Party.

### .3.4.4.5 Salutation

How the Party is to be greeted in correspondence.

### .3.4.4.6 First Name

This is the given, not the family name. As this will be pulled in to the Credit Card verification process, it should be entered here as it appears on the Credit Card and/or the EFT bank account.

### .3.4.4.7 Middle Name

The second given name, if any. Be sure to include it or the initial letter if it is shown on the credit card or EFT account.

### .3.4.4.8 Last Name

Also called the Family name. Be sure the spelling is accurate. This name should also match the name on the credit card or EFT account.

### .3.4.4.9 Personal Title

Optional. Be careful not to assume an incorrect one. Confirm with the Party if they wish to be referred to as Mrs., Ms., Professor, etc.

### .3.4.4.10 Suffix

Optional. Could be Junior, Esquire, etc. They will usually include it when giving you information.

### .3.4.4.11 Nickname

For example, sometimes someone named Robert might prefer to be called Bob. Enter the preferred name here, leaving the correct name above under First Name.

### .3.4.4.12 First Name Local

If the person uses a different name, say for business or professional purposes, or is simply known by a different name within the company, enter that First Name here.

### .3.4.4.13 Last Name Local

If the person uses a different name, say for business or professional purposes, or is simply known by a different name within the company, enter that Last Name here.

### .3.4.4.14 Member ID

If you have an affiliation with another organization, the Member ID might be recorded here to maintain the connection. Or you might have an affiliation group of your own with numbers assigned by family units. With several family members using the same Member ID, this is where that ID could be recorded for each member.

### .3.4.4.15 Gender (drop-down box)

Select the gender from the drop-down box.

### .3.4.4.16 Birth Date (popup calendar)

Use the popup calendar to enter the birthdate or enter in the format YYYY-MM-DD.

### .3.4.4.17 Height

Might be needed for identification purposes. More likely used with employees than with customers.

### .3.4.4.18 Weight

Might be needed for identification purposes. More likely used with employees than with customers.

### .3.4.4.19 Mothers Maiden Name

For security confirmation purposes, this detail can be requested to use when seeking verification that the Party is the same as the one he/she is claiming to be.

### .3.4.4.20 Marital Status (drop-down box)

Select from the drop-down box.

### .3.4.4.21 Social Security Number

In countries outside the US, the federal identification number used to control and monitor citizens.

### .3.4.4.22 Passport Number

Number on the passport.

### .3.4.4.23 Passport Expire Date (popup calendar)

Date the passport expires.

### .3.4.4.24 Total Years Work Experience

Useful for employee data.

### .3.4.4.25 Comments

Additional notes can be entered here.

### .3.4.4.26 Employment Status Enum Id

If this Person is an Employee, this would indicate the status of their employment, i.e., Permanent Exempt, Part-time Non-Exempt, Temporary Contract, etc.

### .3.4.4.27 Occupation

Nature of the Party's work or employment.

### .3.4.4.28 Years With Employer

How many years this Party has worked with the current Employer.

### .3.4.4.29 Months With Employer

If less than a year, number of months of employment can be reported here.

#### .3.4.4.30 Preferred Currency Uom ID

Which national currency the Party wishes to conduct their business with.

#### .3.4.4.31 Description

If a description is useful to record, here is the field where that data can be entered.

### .3.4.5 Loyalty Points

These points can be maintained to establish shopping rewards for customers as a marketing tool.

### .3.4.6 Contact Information

Details for each Contact Type is given here. If anything is incomplete or inaccurate, click on the [Update] link to edit the information.

#### .3.4.6.1 Contact Type

The following appear only if they exist.

##### .3.4.6.1.1 Postal Address

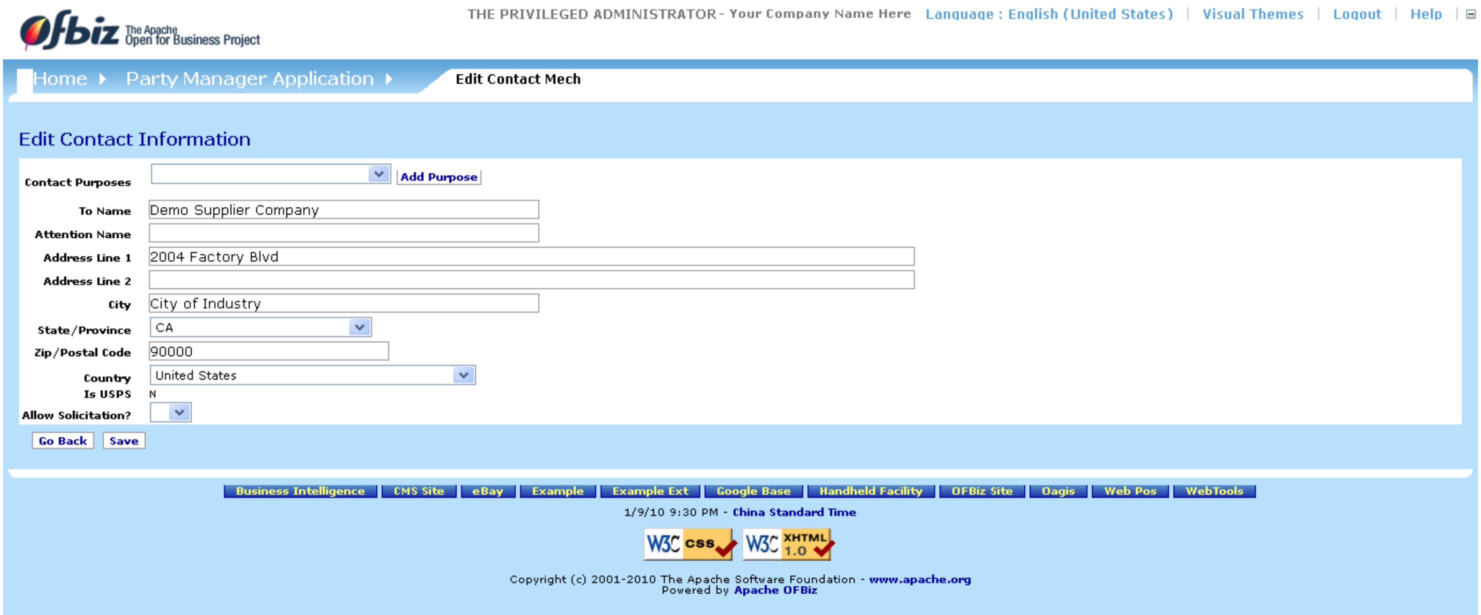
Associated with the address are assignments for which the address is to be used, such as Billing, General Correspondence, Shipping, etc.

You might use the link to (lookup:whitepages.com) for confirming the address.

Note the column 'Soliciting OK?' If this is marked Y, then it is acceptable to mail marketing materials to the address.

Click on [Update] to make changes. Click on [Expire] if the address is no longer active.

### .3.4.6.1.1.1 Edit Contact Mech - Postal




### .3.4.6.1.1.2 link buttons

[Go Back] [Delete] [Save] [Add Purpose]

### .3.4.6.1.1.3 Contact Purposes

This selection governs which contact will be selected by the various managers for accounting, ordering, shipping, etc. Add all that may apply to this contact.

### .3.4.6.1.1.3.1 List of existing

Those Contact Purposes which have already been assigned are given first. Click on [Delete] if an associated Purpose needs to be removed.

### .3.4.6.1.1.3.2 Add Purpose (drop-down box)

What is this contact to be used for? Is this the billing address for a credit card, but not to be used for receiving packages because it is a Post Office box? Select all purposes for which the address can be used by assigning them from this drop-down box.

### .3.4.6.1.1.4 To Name

This would be both the first and last name (as in Tom Brown), or it might be the business name of a company (Tom Brown Company).

### .3.4.6.1.1.5 Attention Name

If this line is used, it would be printed as Attention: Named Person.

### .3.4.6.1.1.6 Address Line 1 *

As indicated by the asterisk , this is a required item. It would generally be the Number and the Street Name as in 123 Main St.

### .3.4.6.1.1.7 Address Line 2

If there is more needed in the address, put it here, such as Apartment Number, or Mail Stop, etc.

### .3.4.6.1.1.8 City *

This is also a required field. You should generally spell out the name (New York City) rather than abbreviate it (NY), both for courtesy and to avoid confusion.

### .3.4.6.1.1.9 State / Province (drop-down box) *

Select the State, Province, Geo-Political Region, or group of Islands from this drop-down box. This is also a required field.

### .3.4.6.1.1.10 Zip / Postal Code *

Double check this one. It is so easy to make a serious mistake. This is also a required field.

### .3.4.6.1.1.11 Country (drop-down box) *

Most of the countries of the world are listed alphabetically in this drop-down list. Select the one you need.

The United States of America is actually listed three times, first at the beginning of the list as 'USA', then again at the top as 'United States;' you will also find it deeper in the list, alphabetically, as United States.

### .3.4.6.1.1.12 Allow Solicitation? (Y / N)

Does the Party give informed consent to calls or mail solicitations? Indicate by choosing Yes or No.

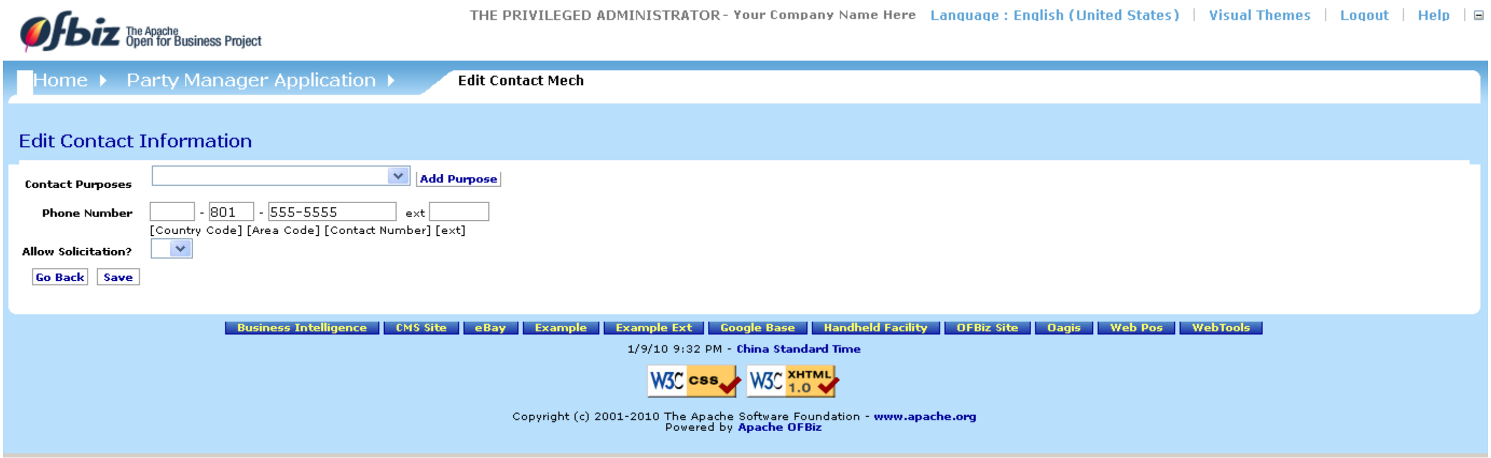
## .3.4.6.1.2 Phone number

Each of the telecom numbers given is listed in its own section. These could be the main home phone number, the fax number, the mobile phone, etc. The links to (lookup:anywho.com) and (lookup:whitepages.com) are there to check out the numbers.

Note the column 'Soliciting OK? If this is marked Y, then it is acceptable to call or fax solicitations.

Click on [Update] to make changes. Click on [Expire] if the phone number is no longer active. Click on [Create New] to add another number.

#### .3.4.6.1.2.1 EditContactMech-Tele




#### .3.4.6.1.2.2 link buttons

[Go Back] [Delete] [Save] [Add Purpose]

### .3.4.6.1.3 Email Address

This is the email address used to send automatically generated notices when shipping an order, etc. Click on the link (send email) to generate a message from this screen.

Note the column 'Soliciting OK? If this is marked Y, then it is acceptable to send marketing email messages.

Click on [Update] to make changes and indicate Purposes. Click on [Expire] if the address is no longer active.

#### .3.4.6.1.3.1 EditContactMech-Email

#### .3.4.6.1.3.2 link buttons

[Go Back] [Delete] [Save] [Add Purpose]

### .3.4.6.1.4 Other

Other contact details might be listed.

### .3.4.6.2 Soliciting OK? Y/N

The question of Soliciting is important for two reasons. First, it provides Marketing with an identifiable lead for marketing targets. Second, it protects the company by marking those within the database who have expressly stated their desire NOT to receive advertisements. You should try to ascertain from each Party their wishes on this subject.

## .3.4.7 Payment Method Information

### .3.4.7.1 Payment Method Information

Details are presented only for the existing methods of payment.

Similar screens appear for either [Create New] or [Update]. The only significant difference is that with [Update] existing information is presented as populated rather than blank.

[Manual Tx] refers to those with a credit card who do not wish their credit card details to exist within your system but will use a credit card number or some other means to accomplish an order by giving the details at the time of ordering for a one-time manual transaction.

Gift Cards need to be established elsewhere within the system with a means to transfer credit funds into them and a numbering system by which to assign them before they can be successfully [Create]d here.

## .3.4.7.2 Update Credit Card

### .3.4.7.2.1 editcreditcard


### .3.4.7.2.2 link buttons

[Cancel / Done] [Save]

### .3.4.7.2.3 Company Name on Card

This refers to a company credit card, not the name of the associated financial institution. For example, the card might be issued by Citibank to the Brown Company with the user's name as Jim Jones. Jim Jones is the Name on Card; Brown Company is the Company Name on Card. The Company Name is NOT a required field; there usually is NO company name on a card. Furthermore, there is no need to record Citibank as the institution because the number itself will yield that information to those who need to know.

### .3.4.7.2.4 Prefix on Card (drop-down box)

If the card has a name prefix given, it may be entered here. Most cards do not. Possible choices from the drop-down box might include:

- Mr.
- Mrs.
- Ms.
- Dr.

### .3.4.7.2.5 First Name on Card *

* Required field. For the card to process correctly, the name given on the card must be reported exactly and completely. If the card holder tells you his name is Tom but Thomas is given on the card, you must have Thomas in this field. Middle initials, if shown on the card, generally need to be included as well under the next field, Middle Name on Card.

### .3.4.7.2.6 Middle Name on Card

Whether the full name or just an initial letter is given on the card, some systems require it to be included in their processing systems. You should always ask, 'Was there a second or middle name on that card?'

### .3.4.7.2.7 Last Name on Card *

* Required field. For the card to process correctly, the name given on the card must be reported exactly and completely. If the card holder tells you his last name is Smith but the spelling of 'Smythe' is given on the card, you must have Smythe in this field.

### .3.4.7.2.8 Suffix on Card (drop-down box)

Whenever a suffix such as Jr. (Junior), Sr. (Senior), or a Roman numeral designator (I, II, III, IV, or V) is included in the name, be sure to select it from the drop-down box.

### .3.4.7.2.9 Card Type (drop-down box) *

The choices are all the usual types: Visa, MasterCard, and whatever others your Administrator chooses to include. Just because the application comes with the following doesn't mean that your processing company accepts them all. Supplied choices include:

- Visa
- Master Card
- American Express
- Diners Club
- Discover
- EnRoute
- JCB

### .3.4.7.2.10 Card Number *

* Required field. Be extremely accurate with this number and the expiration date. Double check the numbers before you click on [Save].

In the Update or review mode, the field will only show the last four digits. You can see the complete number when you return to the View Profile screen. If incorrect there, return here to change it.

### .3.4.7.2.11 Expiration Date * (drop-down boxes)

* Required field. When will the card expire? Use drop-down boxes to specify the month and the year.

### .3.4.7.2.12 Billing Address (button choices)

Note that the billing address must match the address on record with the Credit Card company; be sure to confirm that correlation when accepting a credit card here.

#### .3.4.7.2.12.1 Address choices

All the established contact addresses are presented; use a radio button to select the address associated with the Credit Card for billing purposes.

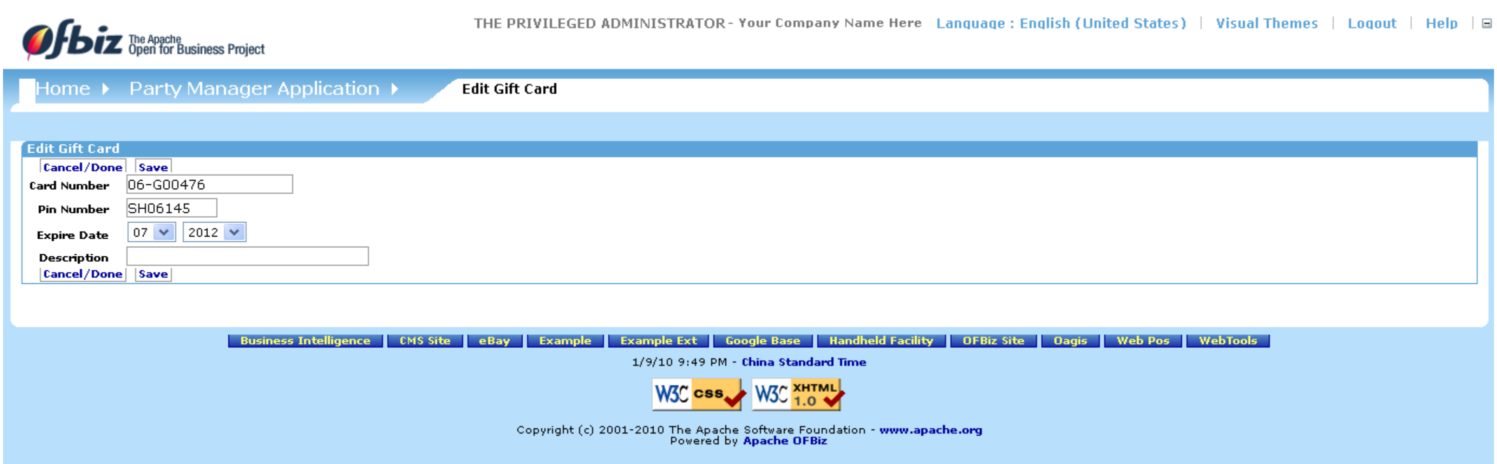
#### .3.4.7.2.12.2 (Create new)

'Create a new billing address for this credit card.' This message and link option will only appear if there is no valid billing address in the system.

## .3.4.7.3 Update / Create Gift Card

This information and screen will probably be modified by your Administrator to work with your company's gift card system.

### .3.4.7.3.1 editgiftcard




### .3.4.7.3.2 link buttons

[Cancel / Done] [Save]

### .3.4.7.3.3 Card Number

Enter a Gift Card number from a list (offline) of those available.

### .3.4.7.3.4 Pin Number

Enter the Pin number needed to confirm the user is authorized to charge items against the Gift Card. Be sure the customer has this number; you might want to back up the phone conversation with an email or a letter to provide a written record.

NOTE: Both the Gift Card number and the related Pin Number are given on the Profile screen, making it easy to pass on this information to the customer should they lose either number.

### .3.4.7.3.5 Expire Date (drop-down boxes)

Use the drop-down box on the left to select the expiration month and the box on the right to select the expiration year.

## .3.4.7.4 Update / Create EFT Account

EFT is an acronym for Electronic Funds Transfer and means that the customer is providing information you need to debit funds directly from his checking or savings account. Some institutions perform minor debits in advance of an order (with the customer's permission) for a few pennies to confirm that the information is correct.

### .3.4.7.4.1 editeftaccount


### .3.4.7.4.2 link buttons

[Cancel / Done] [Save]

### .3.4.7.4.3 Name on Account *

* Required field. For the account transaction to process correctly, the name given on the account must be given exactly and

completely. If the account holder tells you his name is Tom but Thomas is maintained on the account, you must have Thomas in this field. Middle initials generally need to be included as well.

### .3.4.7.4.4 Company Name on Account

This is the name of the company in a company account, not the name of the bank. The bank's name is required in the next field.

### .3.4.7.4.5 Bank Name *

* Required field. This required field is important because the Routing Number and the Bank Name are completely linked in the system. By giving the name, you are confirming the Routing Number; the reverse is also true.

When financial institutions are merged, there is a period of confusion with the name. It may take a while before the name associated with the routing number is changed. Stay with the original name until the bank requests or confirms that the new one should be used.

### .3.4.7.4.6 Routing Number *

* Required field. The Routing Number identifies the financial institution. At the bottom of a check, it will be the first group of numbers from the left. It is separated from the Account Number by a strange symbol that kind of looks like |: except the 'pipe' is short and thick, rather like the colon symbol.

### .3.4.7.4.7 Account Type * (drop-down box)

* Required field. Select Checking or Savings from the drop-down box.

### .3.4.7.4.8 Account Number *

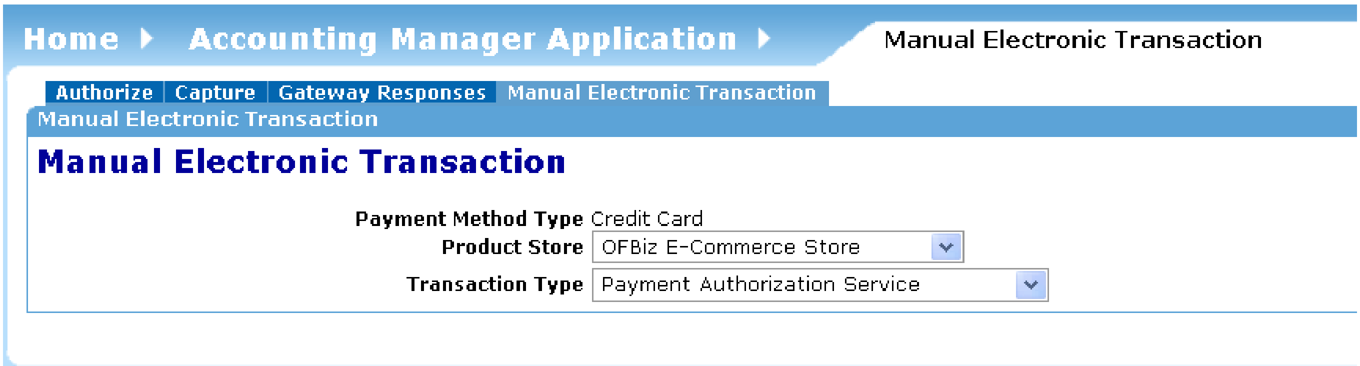
* Required field. This is the remainder of the number at the bottom of a check. Disregard the part that contains the check sequence number.

### .3.4.7.4.9 Billing Address

Confirm the billing address by selecting the corresponding radio button. If the bank uses a different address from the party than what is shown here, go to the Contact Mechanism tab and create a new Billing Address. When you return to this screen, that will be listed as a choice for selection.

## .3.4.7.5 Manual TX link

### .3.4.7.5.1 ManualETx




## .3.4.8 Cybersource AVS Override

### .3.4.8.1 Edit AVS Override String

Many companies often turn away sales that were 'approved' by the card issuer but that contained 'partial match' or 'no match' Address Verification Service (AVS) results in the authorization response. Unfortunately, these AVS results are often unreliable, since AVS does not evaluate the entire address. For example, AVS performs address matching only on the numeric digits of the address (that is, the street number and postal code). As a result, AVS results can lead you to believe that perfectly legitimate transactions are suspicious in some way.

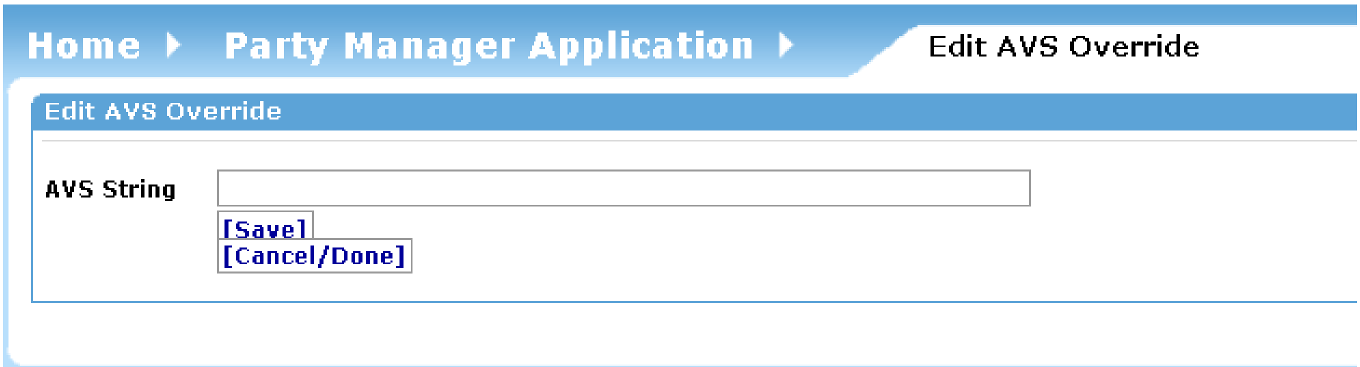
In contrast, CyberSource uses powerful address validation technology that has been approved by the U.S. Postal Service.

Smart Authorization analyzes the complete address and assesses the likelihood that it is legitimate and deliverable.

Because this technology is so much more powerful and accurate than that provided by the card associations, we recommend that you ignore the AVS results in the authorization response. If Smart Authorization detects a 'bad' address, it will return a risk factor code indicating this.

See more information at the CyberSource website: http://www.cybersource.com/

### .3.4.8.1.1 editAvsOverride




### .3.4.8.1.2 link buttons

[Save] [Cancel / Done]

### .3.4.8.1.3 AVS String *

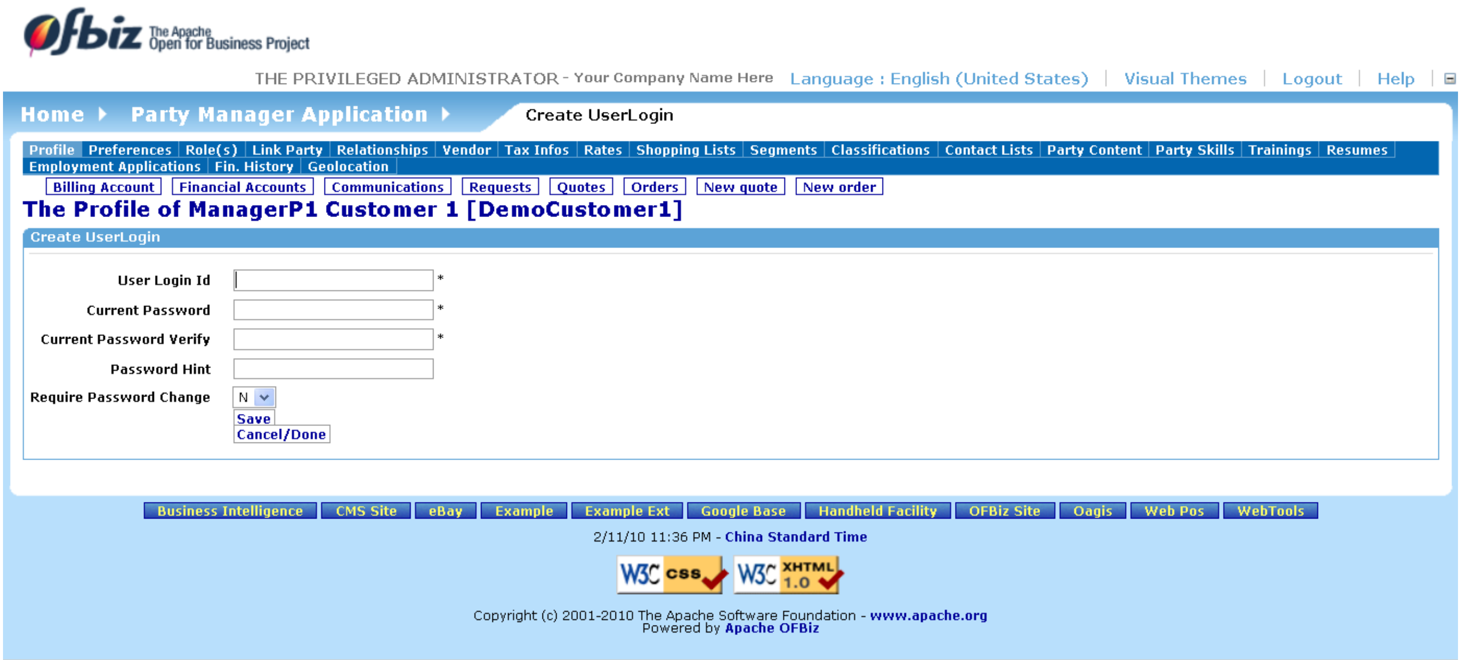
This is the string of characters which will override the existing AVS default setting.

## .3.4.9 User Names

### .3.4.9.1 Create New UserLogin

Because the OFBiz is designed to be operated on the Internet, security of both the business' and the customer's information is essential. Creation and maintenance of secure logins is important to all parties and should be taken seriously. This screen is only used to create a UserLogin for a new Party. Once a Party has received a UserLogin, use the Change UserLogin Password screen to make any changes.

## .3.4.9.1.1 createnewlogin




## .3.4.9.1.2 link buttons

[Cancel / Done] [Save] [Billing Accounts] [Orders] [New Order] [Payments Sent] [Payments Received] [Profile] [Role(s)] [Relationships] [Communications] [Vendor] [Tax Infos] [Rates] [Shopping Lists] [Segments] [Classifications] [Contact List]

## .3.4.9.1.3 User Login ID

The LoginID should be simple and easily remembered by the Party. It must also be unique to the system or it will be rejected if an identical LoginID has been assigned to another.

## .3.4.9.1.4 Current Password

When creating a Password, try to use a combination of random characters, upper and lower case, with one or more numerals, for a total of 6 to 16 characters. For example, ImLes is both too short and too easily guessed.

Better would be rT8gvx30wwpqM which is both meaningless and random. Something between these two extremes should be fine.

## .3.4.9.1.5 Current Password Verify

Re-entry of the password helps prevent the recording of typographical errors.

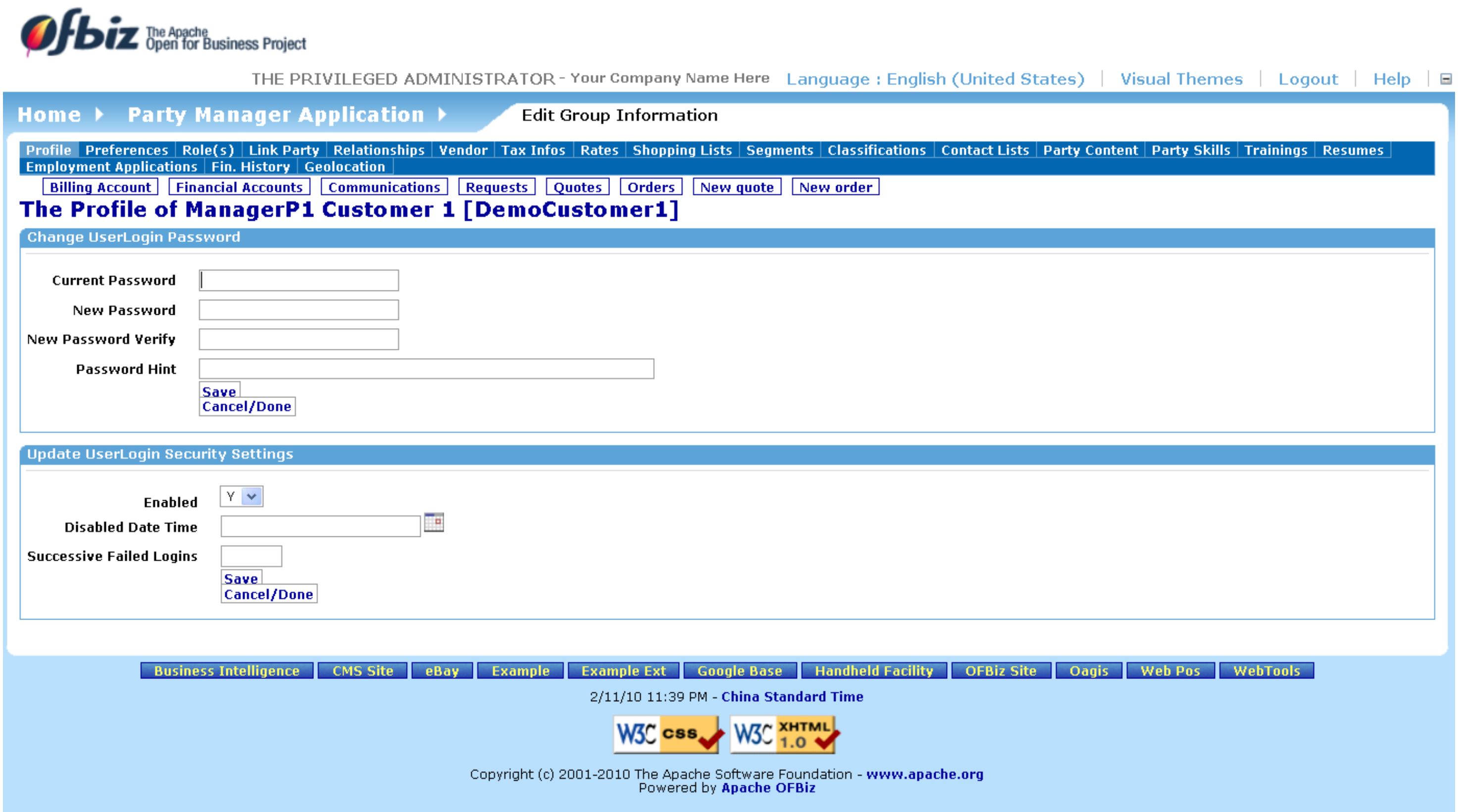
## .3.4.9.1.6 Password Hint

A 'hint' is some information known to the individual and used by the company to confirm that the person seeking a lost password is the true owner of that ID/Password combination.

## .3.4.9.2 Edit >> Changes screen

After creating a new login, press [Edit] to enter the information. It will bring up the next screen. This is also the screen used to make changes to passwords.

### .3.4.9.2.1 editlogin




### .3.4.9.2.2 link buttons

[Cancel / Done] [Save] [Billing Accounts] [Orders] [New Order] [Payments Sent] [Payments Received] [Profile] [Role(s)] [Relationships] [Communications] [Vendor] [Tax Infos] [Rates] [Shopping Lists] [Segments] [Classifications] [Contact List]

### .3.4.9.2.3 Change UserLogin Password

#### .3.4.9.2.3.1 Current Password

Enter the existing, current Password so the system knows you are authorized to change the Password.

#### .3.4.9.2.3.2 New Password

The new password should be significantly different from the old to prevent compromise of security. For example, if the old password was '4Tom2Use', it is NOT good to make the new one '4Tom2Use2'.

#### .3.4.9.2.3.3 New Password Verify

By entering the new password twice, the opportunity to make a typographical error (and thus create a password which cannot be remembered) is reduced.

#### .3.4.9.2.3.4 Password Hint

A hint is something known to the individual and used by the company to confirm that the person seeking a lost password is the true owner of that ID/Password combination.

### .3.4.9.2.4 Update UserLogin Security Settings

#### .3.4.9.2.4.1 Enabled? (Y/N)

You might temporarily disable an account you have just created. This account could be for a new employee who is not yet on board or or for a customer whose credit has not been verified. With the account already created during all of the other entries, it can be instantly Enabled whenever desired as the circumstances change.

If there is a question about an account, say a bill is late being paid, the account can be temporarily disabled without removing the customer from the system.

#### .3.4.9.2.4.2 Disabled Date (popup calendar)

This would be the date a UserLogin is disabled, either manually by an administrator or automatically by the system for too many attempts with the wrong password which might indicate an attempted hacking.

If you are manually disabling the account, enter the date/time here with the popup calendar.

#### .3.4.9.2.4.3 Successive Failed Logins

Enter the number of unsuccessful login attempts permitted before the system automatically disables the UserLogin.

NOTE: The system can be programmed to automatically reinstate an account after a set amount of time has elapsed.

## .3.4.9.3 Security Groups

### .3.4.9.3.1 EditUserLoginSecurityGroups

### .3.4.9.3.2 link buttons

[Update] [Remove] [Add] [Billing Accounts] [Orders] [New Order] [Payments Sent] [Payments Received] [Profile] [Role(s)] [Relationships] [Communications] [Vendor] [Tax Infos] [Rates] [Shopping Lists] [Segments] [Classifications] [Contact List]

### .3.4.9.3.3 Edit UserLogin Security Groups

#### .3.4.9.3.3.1 Group

Click on this ID to be taken to the Security tab > Security Groups edit screen.

#### .3.4.9.3.3.2 From Date

This is generally now, the current date and time.

#### .3.4.9.3.3.3 Thru Date

This is where you can place a time limit on a Party's period of authority. For example, if someone has temporary responsibility for administering the Blog while his manager is on vacation, this temporary authority could be set to expire upon the date of the manager's return from vacation.

#### .3.4.9.3.3.4 Remove?

Click on [Remove] when the user's permission is being removed from this security group.

### .3.4.9.3.4 Add UserLogin to Security Group

#### .3.4.9.3.4.1 Group (drop-down box)

Permissions are the authority to make changes to or allow entry into the System at certain places. Here you select from the Group which has the Permissions needed for the Party.

For example, if the Party works in the Accounting section making entries in the Accounts Receivable department, she would not need to have Permissions to change everyone's password. Her group would include only those Permissions she needs to do her job. On the other hand, the Systems Administrator needs to be able to do whatever might be needed anywhere in the Application; he would have the highest level of permissions and authorizations.

#### .3.4.9.3.4.2 From Date (popup calendar)

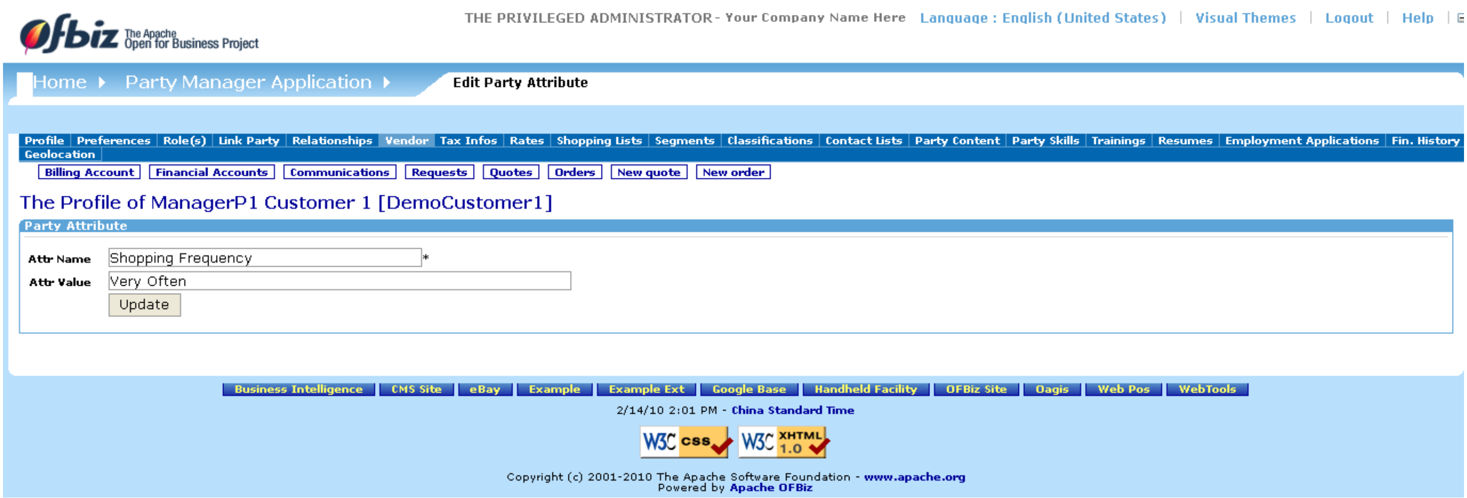
From which date and time forward are these permissions to be in place? You might choose to indicate the present, but if this is a new employee with a week of training before needing access to the system, enter an appropriate date and time.

#### .3.4.9.3.4.3 Thru Date (popup calendar)

It is good security practice to set an expiration date on access. By reviewing the need for permission to be part of the Security Group periodically, limits are placed around sensitive areas.

## .3.4.10 Party Attributes

### .3.4.10.1 partyattributes



### .3.4.10.2 link buttons

[Edit] [Create New]

### .3.4.10.3 Discussion

From the viewprofile screen you have a Section labeled 'Party Attributes.' This is usually empty until you click on the [Create New] link. That link takes you to the screen shown above which appears to be part of the Vendor tab processes. The fields are blank when first presented from the [Create New] link. Give any attribute you wish to use a name and a value the press [Update].

The newly-created Attribute will continue to display in this Vendor > Create Attribute screen as if you had not clicked on the [Update] link, so to see the new Attribute you need to click on the [Profile] tab. You will see the newly-created Attribute in the Party Attribute(s) section of the Profile.

When you click [Edit], you are returned to this same screen under Vendor but with the fields populated for the selected Attribute. Make what ever changes you need then click [Update]. Again, you will need to return to the viewprofile screen to see the changes reflected in the Profile.

### .3.4.10.4 Name

Call the Attribute anything you feel is appropriate. The Name generally refers to a characteristic, a quality, a performance factor, or some other thing about the Party that can be expressed as a Value.

### .3.4.10.5 Value

Words that give measure or purpose to the named Attribute.

## .3.4.11 Last Visit(s) section

Shows only the most recent until you click on [List All].

### .3.4.11.1 Visit ID

Click on the ID to view the Visit Detail and Hit Tracker screen. Here you see details about when the Party used the application for a predetermined number of visits on display.

You can also [List All] visits made by this party or you can click on the Visit ID for more information about that visit.

#### .3.4.11.2 User Login

The 'name' by which they logged in.

#### .3.4.11.3 New User

Was this their first visit? Did they create their Login ID with this visit? A 'Y' in this column means that this was their first visit to the website or into the business.

#### .3.4.11.4 WebApp

Was the client working through the ecommerce application or some other part of the business?

#### .3.4.11.5 Client IP

The address of the client Internet Provider.

#### .3.4.11.6 From Date (includes time)

When did they log in?

#### .3.4.11.7 Thru Date (includes time)

This could either be the time they logged out or the time when the system 'timed out' on them through inactivity.

### .3.4.12 Notes

#### .3.4.12.1 By

Shows who created the Note.

#### .3.4.12.2 At (date/time)

Shows when the note was created.

### .3.4.12.3 Text

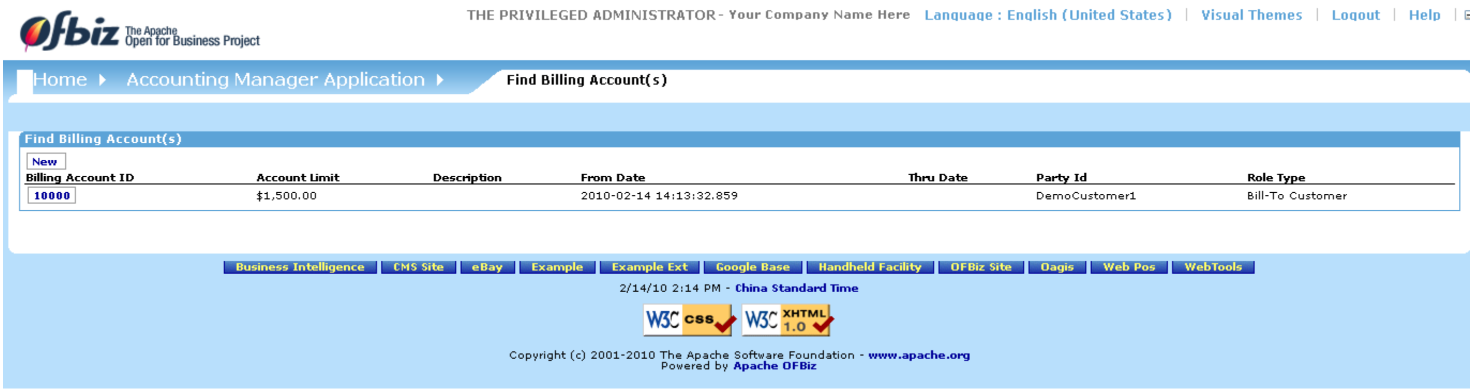
Content of the Note.

### .3.4.12.4 Notes discussed

You need to return to the View Profile screen to see these notes at the bottom of the screen. Notes accumulate and are presented most recent first.

## .3.4.13 Billing Accounts link

### .3.4.13.1 BillingAccounts

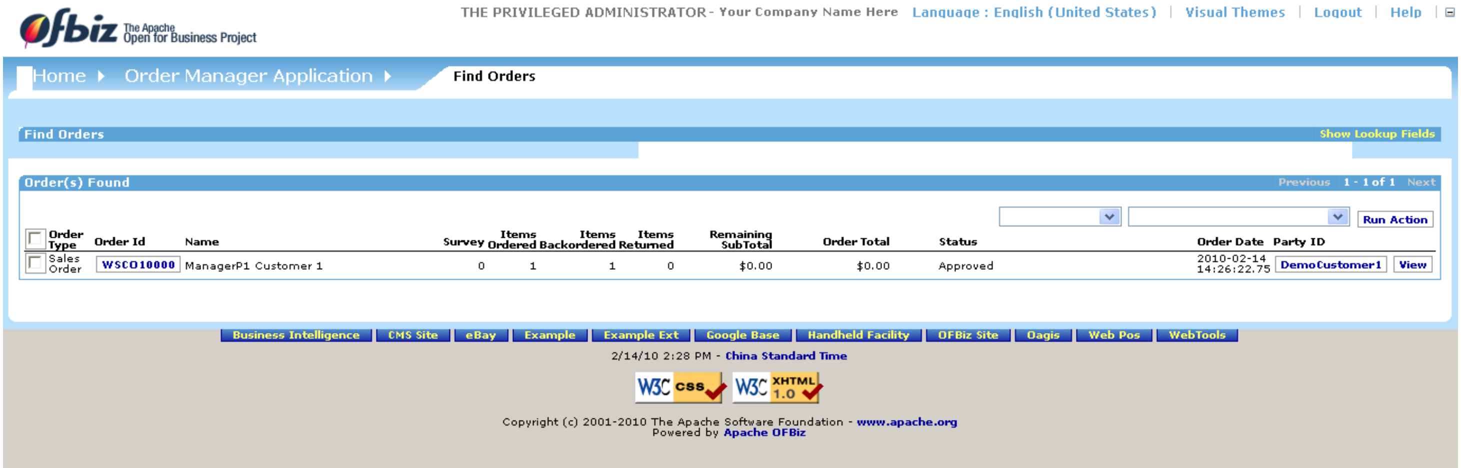



### .3.4.13.2 Billing Accounts link discussion

If the selected Party has an existing Account or Accounts within the Accounting Manager, this link takes you to the screen FindBillingAccount with a list of those accounts and their account limits.

## .3.4.14 Orders link

### .3.4.14.1 Orders



### .3.4.14.2 Orders link discussion

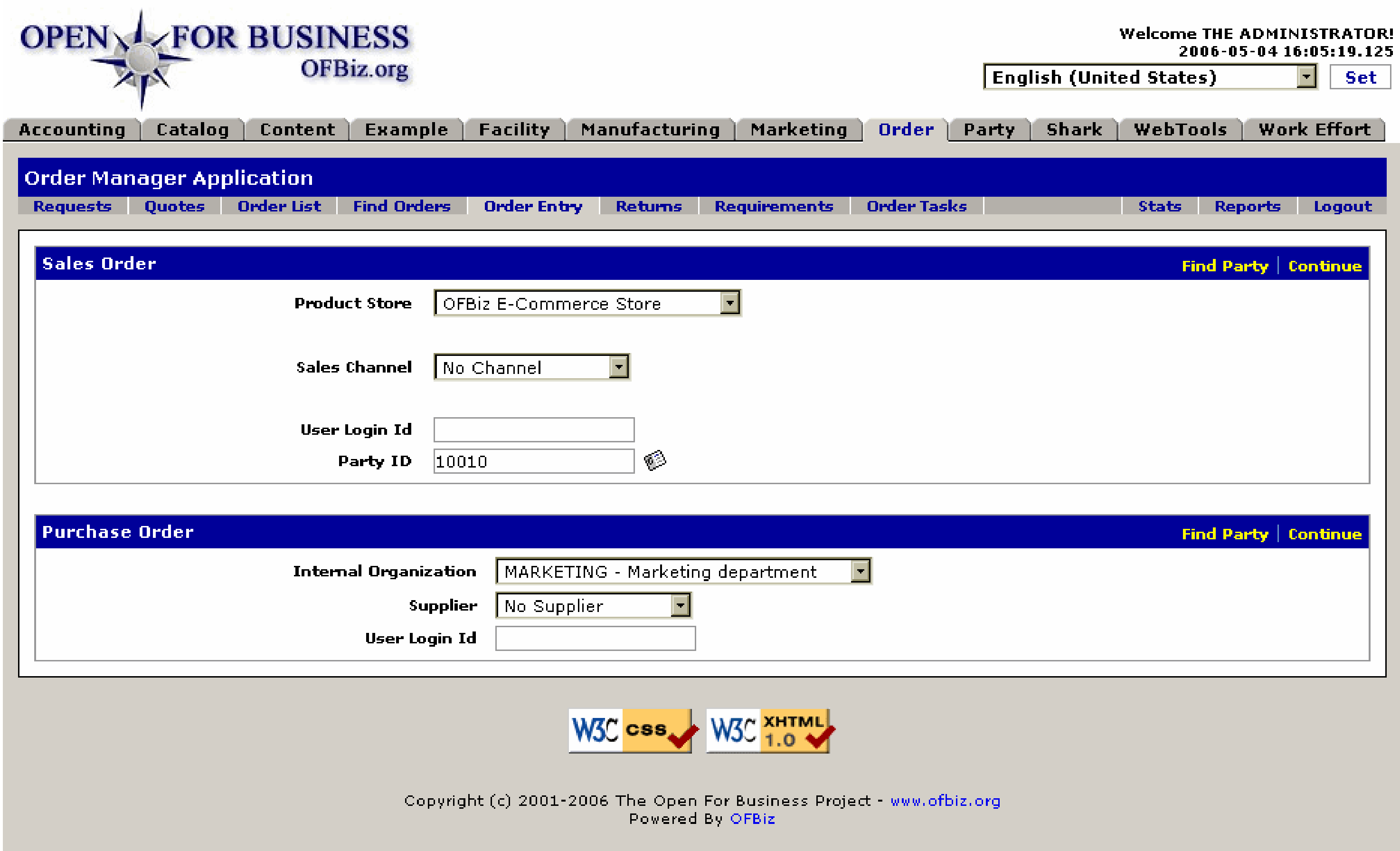
The Orders link takes you directly to the Order Manager > Find Orders tab with a table of all the orders entered by the profiled User. Click on the Order ID or [View] to see details of the order; click on [Run Action] to perform an action selected from the drop-down box, such as Pick Orders or Approve.

## .3.4.15 New Order link

### .3.4.15.1 New Order link discussed

This link opens the Order Manager >> Create New Order screen for the selected Party. Be sure that you click on [Continue] in the upper section for a Sales Order, not the lower Purchase Order one.

### .3.4.15.2 newOrder




[New Order] brings up this familiar Order Entry screen initiator with the Party ID populated and ready for a click on [Continue].

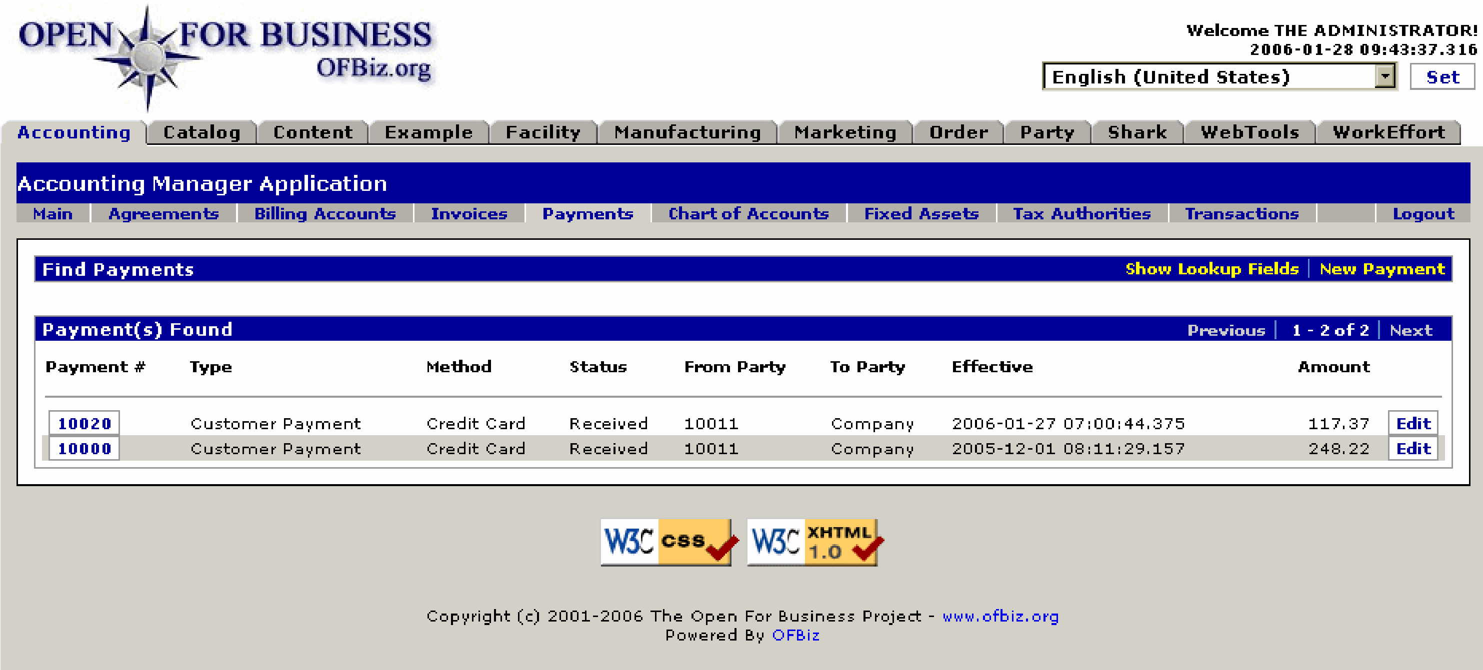
## .3.4.16 Payments Sent link

### .3.4.16.1 Payments Sent link discussed

If the Party is a Vendor, someone needing a refund or an Accounts Payable type of party, this link presents a list of Payments sent from your Company to the Party as shown in the Accounting Manager > Payments tab.

## .3.4.17 Payments Received link

### .3.4.17.1 paymentsReceived




[Payments Received] takes you to this Accounting Manager screen where you can identify and then view/edit Payments received.

### .3.4.17.2 Payments Received link discussed

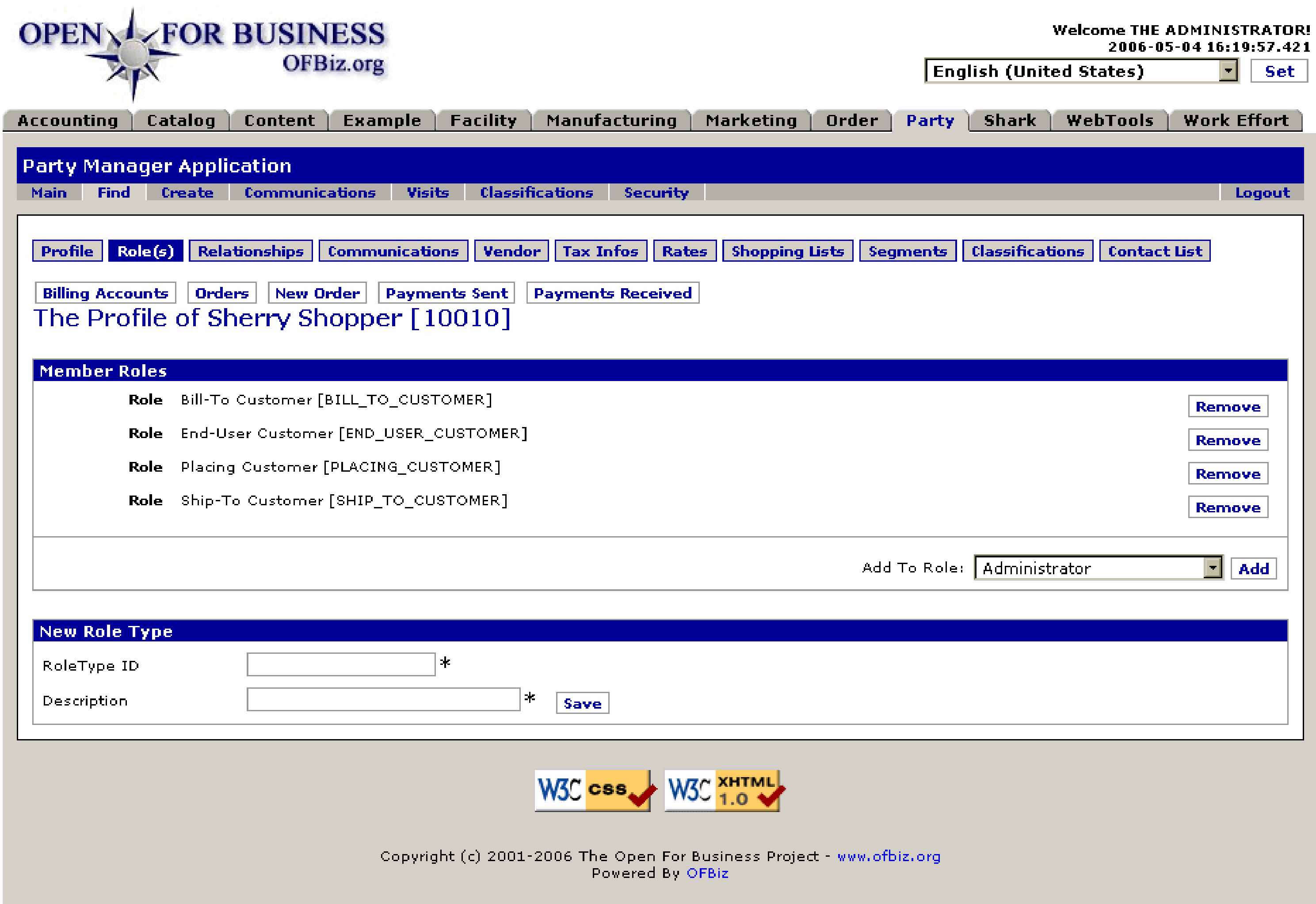
If the Party has made payments to your company, the receipt of those Payments is listed here through this link to the Accounting Manager.

# .4 Other Profile sub-tabs

## .4.1 Role(s)

Obviously, one Party may interrelate with others in a wide variety of roles. The assignment of a Role to a party is useful in tracking activity, in generating party-applicable responses by the software, and in identifying which parties (by their roles) shall be given security authorizations.

## .4.1.1 viewroles




All Roles currently assigned are shown here; remove or add as needed. Note also the tool for creating new Role Types.

## .4.1.2 link buttons

[Remove] [Add] [Save] [Billing Accounts] [Orders] [New Order] [Payments Sent] [Payments Received] [Profile] [Role(s)] [Relationships] [Communications] [Vendor] [Tax Infos] [Rates] [Shopping Lists] [Segments] [Classifications] [Contact List]

## .4.1.3 Member Roles

### .4.1.3.1 Role

Each Role for this Party as assigned is given after the word Role.

#### .4.1.3.2 Add To Role (drop-down box)

If you do not find the appropriate Role Type from the listing in the drop-down box, use the following tool, 'New Role Type,' to create whatever is needed.

### .4.1.4 New Role Type

#### .4.1.4.1 Role Type ID *

Enter in CAPITAL LETTERS, a brief identification (ID) which will appear inside the brackets [ID] in listings of Roles.

Underline between words as in BILL_TO_CUSTOMER.

#### .4.1.4.2 Description *

Assignment of privileges for the new role type is made through Party Groups, Relationships and Security functions.

After pressing the [Save] link, the newly-created Role Type will appear in the drop-down box for assignment to any Party.

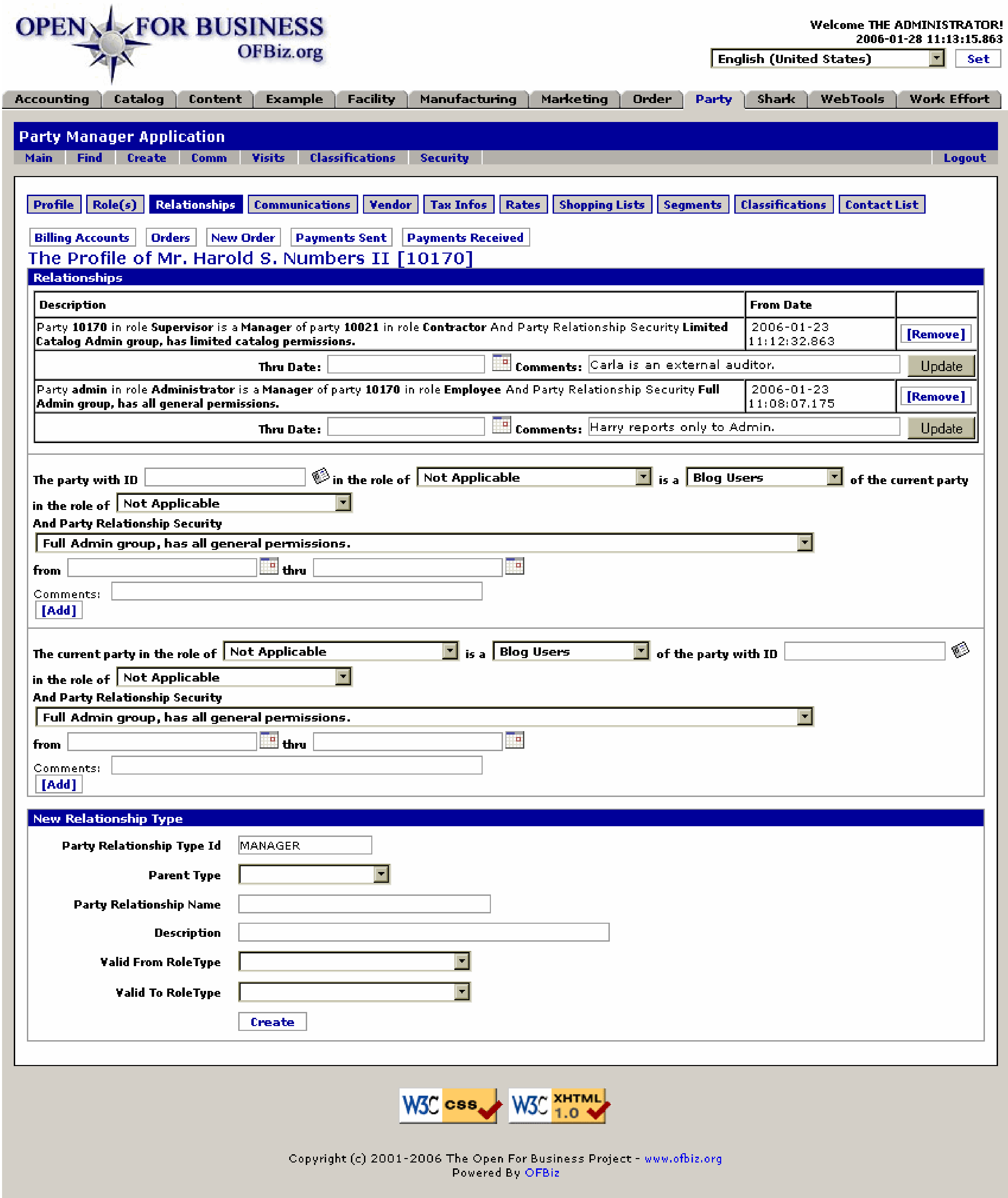
## .4.2 Relationships

While the screen may seem complicated, this is a powerful tool for monitoring, updating and creating parent/child relationships between the parties.

NOTES:

1. Must have previously established a Party which is treated as the 'current party' at this screen.
2. Each party being assigned a relationship must have previously had the authority to hold the assigned role in the relationship. Use the Role(s) tab to establish that authority before proceeding.

### .4.2.1 viewrelationships




Parent and Child relationships between people and within organizations are established and maintained at this screen.

## .4.2.2 link buttons

[Remove] [Add] [Update] [Create] [Billing Accounts] [Orders] [New Order] [Payments Sent] [Payments Received] [Profile] [Role(s)] [Relationships] [Communications] [Vendor] [Tax Infos] [Rates] [Shopping Lists] [Segments] [Classifications] [Contact List]

## .4.2.3 Party Relationships

### .4.2.3.1 Editing tool

Existing relationships editing tool.

NOTE: Table of existing relationships and this tool only shown when relationships already exist.

#### .4.2.3.1.1 Description

This is a word description of the Relationship as previously established with drop-down selections. See the two 'Creating' segments below for details about the contents.

#### .4.2.3.1.2 From Date (popup calendar)

When the Relationship began.

Either use the popup calendar or enter in the format yyyy-MM-dd H:mm:ss.0. Will not accept without the time, so if it begins at midnight, enter 0:00:00.0.

#### .4.2.3.1.3 Thru Date (popup calendar)

The Relationship terminates at the indicated Date and Time. You can leave this optional field open.

This Date can be changed here without recreating the Relationship.

Either use the popup calendar or enter in the format yyyy-MM-dd H:mm:ss.0. The system will not accept an entry without the time, so if the relationship ends at midnight, enter 23:59:59.9.

#### .4.2.3.1.4 Comments

Comments can be added or amended in this box.

## .4.2.3.2 Creating child

### .4.2.3.2.1 Creating child

Creating child-relationships tool.

### .4.2.3.2.2 'The party with ID' (popup search tool)

If you do not have the correct Party ID, use the tool to locate it. Any role to be assigned with this relationship must already exist; use the Roles tab to pre-authorize the assignment of Roles.

For example, if you wanted to make Harold S. Numbers II (10170) the manager of the Accounting Department, these role assignments need to already exist:

1. The Party ID 10170 must be assigned a role of Manager.
2. The ACCOUNTING Group party must be recognized as a Department.

To make these assignments, bring up each party (one at a time), select the Roles tab, and make the necessary assignments. Then you can come here to Relationships and establish the Harry Numbers as the Manager of the Accounting Department.

### .4.2.3.2.3 'in the role of' (drop-down box)

Roles in the drop-down box might be Competitor, Manager, Employee, Contact, Vendor, whatever Role might need to be used.

New Roles can be created in the tool under the Role sub-tab, discussed above. As soon as they are created there, they will appear in the drop-down menu here.

### .4.2.3.2.4 'is a' (drop-down box)

Select from one of the listed Relationship terms. These might be Manager, Employee, Supervisor, Sales Representative, etc.

Use the tool at the bottom of the screen to create new Relationship terms. As soon as the term is created, it will appear in the drop-down list.

### .4.2.3.2.5 'of the current party in the role of' (drop-down box)

Roles in the drop-down box might be Competitor, Manager, Employee, Contact, Vendor, whatever Role might need to be used.

New Roles can be created in the tool under the Role sub-tab, discussed above. As soon as they are created there, they will appear in the drop-down menu here.

### .4.2.3.2.6 And Party Relationship Security (drop-down box)

Select the level of Security using the drop-down box.

### .4.2.3.2.7 'from' (popup calendar)

Either use the popup calendar or enter in the format yyyy-MM-dd H:mm:ss.0.

Will not accept without the time, so if it begins at midnight, enter 0:00:00.0. [Now] will enter the current date.

### .4.2.3.2.8 'thru' (popup calendar)

Either use the popup calendar or enter in the format yyyy-MM-dd H:mm:ss.0.

The system will not accept entrieds without a time, so if it ends at midnight, enter 23:59:59.9.

### .4.2.3.2.9 Comments

Optional.

## .4.2.3.3 Creating parent-relationships tool

### .4.2.3.3.1 'The current party in the role of' (drop-down box)

Roles in the drop-down box might be Competitor, Manager, Employee, Contact, Vendor, whatever Role might need to be used.

New Roles can be created in the tool under the Role sub-tab, discussed above. As soon as they are created there, they will appear in the drop-down menu here.

### .4.2.3.3.2 'is a' (drop-down box)

Select from one of the listed Relationship terms. These might be Manager, Employee, Supervisor, Sales Representative, etc.

Use the tool at the bottom of the screen to create new Relationship terms. As soon as the term is created, it will appear in the drop-down list.

### .4.2.3.3.3 'of party with ID' (popup search tool)

Use the popup tool to specify the Child Party for this relationship.

### .4.2.3.3.4 'in the role of' (drop-down box)

Assigned roles must be within pre-set parameters of those roles.

Roles in the drop-down box might be Competitor, Manager, Employee, Contact, Vendor, whatever Role might need to be used.

New Roles can be created in the tool under the Role sub-tab, discussed above. As soon as they are created there, they will appear in the drop-down menu here.

#### .4.2.3.3.5 And Party Relationship Security (drop-down box)

Select level of security from the drop-down box.

#### .4.2.3.3.6 'from' (popup calendar)

Either use the popup calendar or enter in the format yyyy-MM-dd H:mm:ss.0. The system will not accept this input without a time entry, so if the relationship begins at midnight, enter 0:00:00.0. [Now] will enter the current date.

#### .4.2.3.3.7 'thru' (popup calendar)

Either use the popup calendar or enter in the format yyyy-MM-dd H:mm:ss.0. The system will not accept this input without a time entry, so if the relationship ends at midnight, enter 23:59:59.9.

#### .4.2.3.3.8 Comments

Optional.

## .4.2.4 New Relationship Type

### .4.2.4.1 Party Relationship Type ID

This is NOT the name that will appear in the Relationship Type drop-down list.

### .4.2.4.2 Parent Type (drop-down box)

Select an existing Role Type from the drop-down box.

### .4.2.4.3 Party Relationship Name

This IS the name that will appear in the Party Relationship drop-down list.

### .4.2.4.4 Description

Describe the name in a few short terms.

### .4.2.4.5 Valid From Role Type (drop-down box)

This new Relationship term will be valid for people coming from which Role?

## .4.2.4.6 Valid To Role Type (drop-down box)

This new Relationship term will valid for a Party assuming which Role Type?

## .4.3 Communications

### .4.3.1 commEvents


This is the table of existing Communication Events as found under the Communication tab, Comm Event sub-tab.

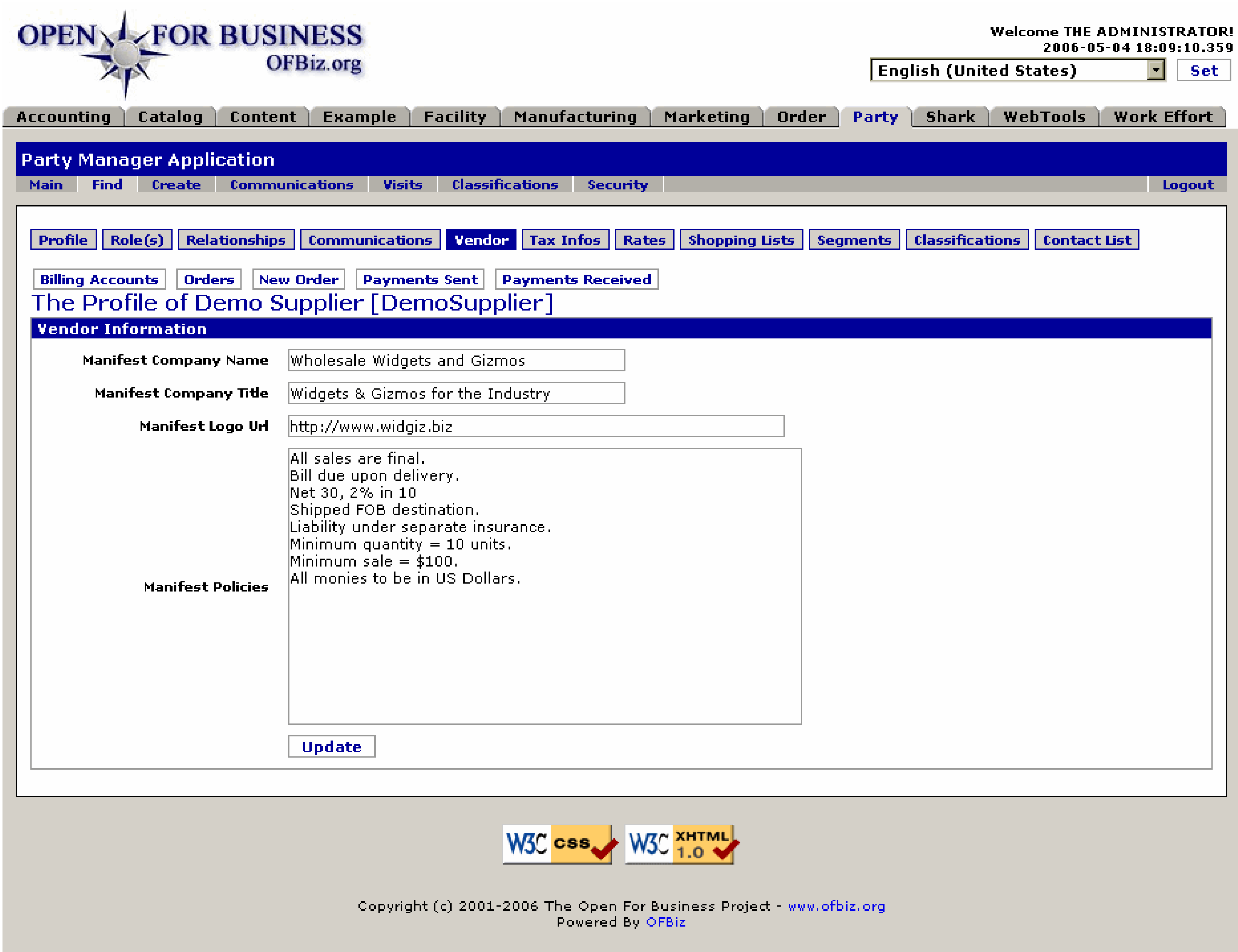
### .4.3.2 Communications

When you select this tab, you are taken to the Comm functions. See details under the major Communications tab.

## .4.4 Vendor Information

This is where new Vendors are entered into your system. Vendors are those parties who will be supplying you with products, material, services, and support.

## .4.4.1 viewvendor




Vendor Profile is created and updated here for an existing, selected Party. Enter details and click on [Update].

## .4.4.2 link buttons

[Update] [Billing Accounts] [Orders] [New Order] [Payments Sent] [Payments Received] [Profile] [Role(s)] [Relationships] [Communications] [Vendor] [Tax Infos] [Rates] [Shopping Lists] [Segments] [Classifications] [Contact List]

## .4.4.3 Manifest Company Name

'Manifest' refers to the documentation accompanying shipments received from a Vendor. Each shipment is authorized through and accompanied by a Manifest which identifies the source of the merchandise and gives details of the shipment.

### .4.4.4 Manifest Company Title

Oftentimes the Company Name is not used so much in business practices; the Company Title might be more familiar.

### .4.4.5 Manifest Logo Url

Where the business can be found on the Internet. For example, www.ups.com.

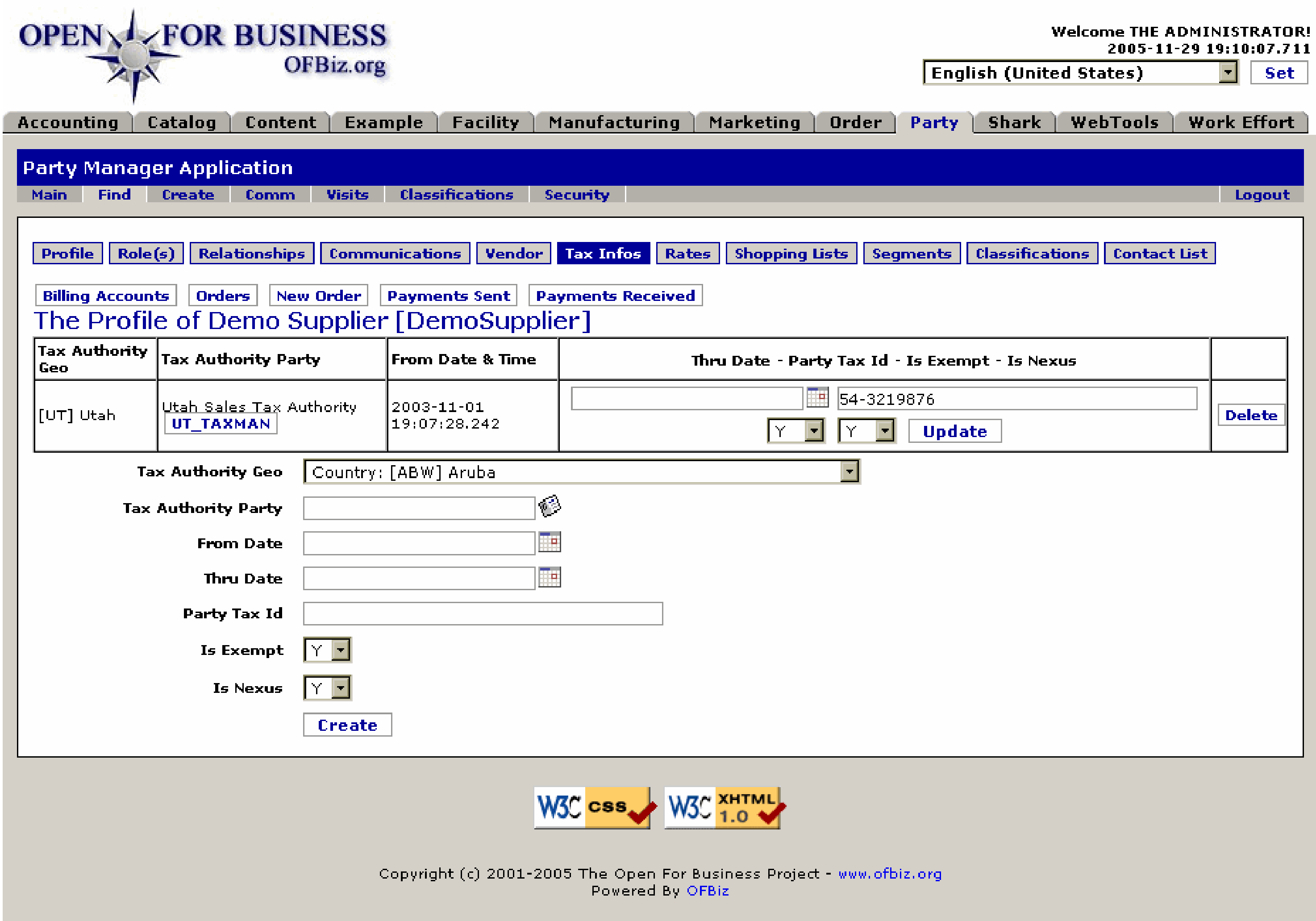
'URL' actually means Uniform Resource Locator, but it is the term used to specify a web address.

### .4.4.6 Manifest Policies

These are the terms of agreement to be accepted by customers when the Vendor ships them a product or performs a service.

## .4.5 Tax Infos

### .4.5.1 EditPartyTaxInfos




At this screen you will enter the taxing information about the Vendor. After created, data appears in the table.

### .4.5.2 link buttons

[Delete] [Create] [Billing Accounts] [Orders] [New Order] [Payments Sent] [Payments Received] [Profile] [Role(s)] [Relationships] [Communications] [Vendor] [Tax Infos] [Rates] [Shopping Lists] [Segments] [Classifications] [Contact List]

## .4.5.3 Table of applied jurisdictions

### .4.5.3.1 Tax Authority Geo

Discussed in same topic under Tool, below.

### .4.5.3.2 Tax Authority Party

Discussed under the same topic under Tool, below.

### .4.5.3.3 From Date / Time

Discussed in same topic under Tool, below.

### .4.5.3.4 Thru Date / Time (popup calendar)

May be updated within the table.

### .4.5.3.5 Party Tax ID

May be edited within the table.

### .4.5.3.6 Is Exempt? (Y/N)

Discussed in same topic under Tool, below.

### .4.5.3.7 Is Nexus?

May be edited in the table. See discussion below, under Tool.

## .4.5.4 Tool to apply jurisdictions

### .4.5.4.1 Tax Authority Geo (drop-down box)

Parties may be subject to multiple taxing jurisdictions; enter each one into the table.

### .4.5.4.2 Tax Authority Party

Create a Party within the Party Manager for each of the taxing authorities you may be liable to. In this field, insert the party ID for the tax authority corresponding with the geographical jurisdiction.

### .4.5.4.3 From Date (popup calendar)

Confirm this date with the Vendor; it needs to be more than just the time you enter the data. This date needs to reflect back before the first transaction you had with this Vendor while they were subject to the taxing Jurisdiction.

### .4.5.4.4 Thru Date (popup calendar)

Since the system will expire the taxing jurisdiction on this date, it needs to either be accurate or far enough into the future that it will not prematurely end the taxing information within the system.

### .4.5.4.5 Party Tax ID

Accuracy is crucial, even critical, as this is the number by which the vendor is known to the taxing authority. Always confirm this number with the Vendor; be sure they know which jurisdiction you are referring to.

### .4.5.4.6 Is Exempt?

As sales tax or VAT are usually paid by the end customer, being 'Exempt' from those taxes as a mid-tier vendor has a significant impact on the purchase cost. If the Vendor has not been established as 'Exempt' within his jurisdiction, however, there are financial and legal ramifications for processing transactions as if he were exempt.

Confirm this point with the Vendor before selecting Yes.

### .4.5.4.7 Is Nexus?

Set to indicate if the party is considered Nexus with the State taxing authority. The exact definition of nexus is determined at the state level. Different states have different rules on what will create nexus in their state.

For example:

- Florida may require a consistent physical presence; if true, employees attending seminars or conferences don't establish nexus.
- New York requires only a series of temporary visits to create nexus.

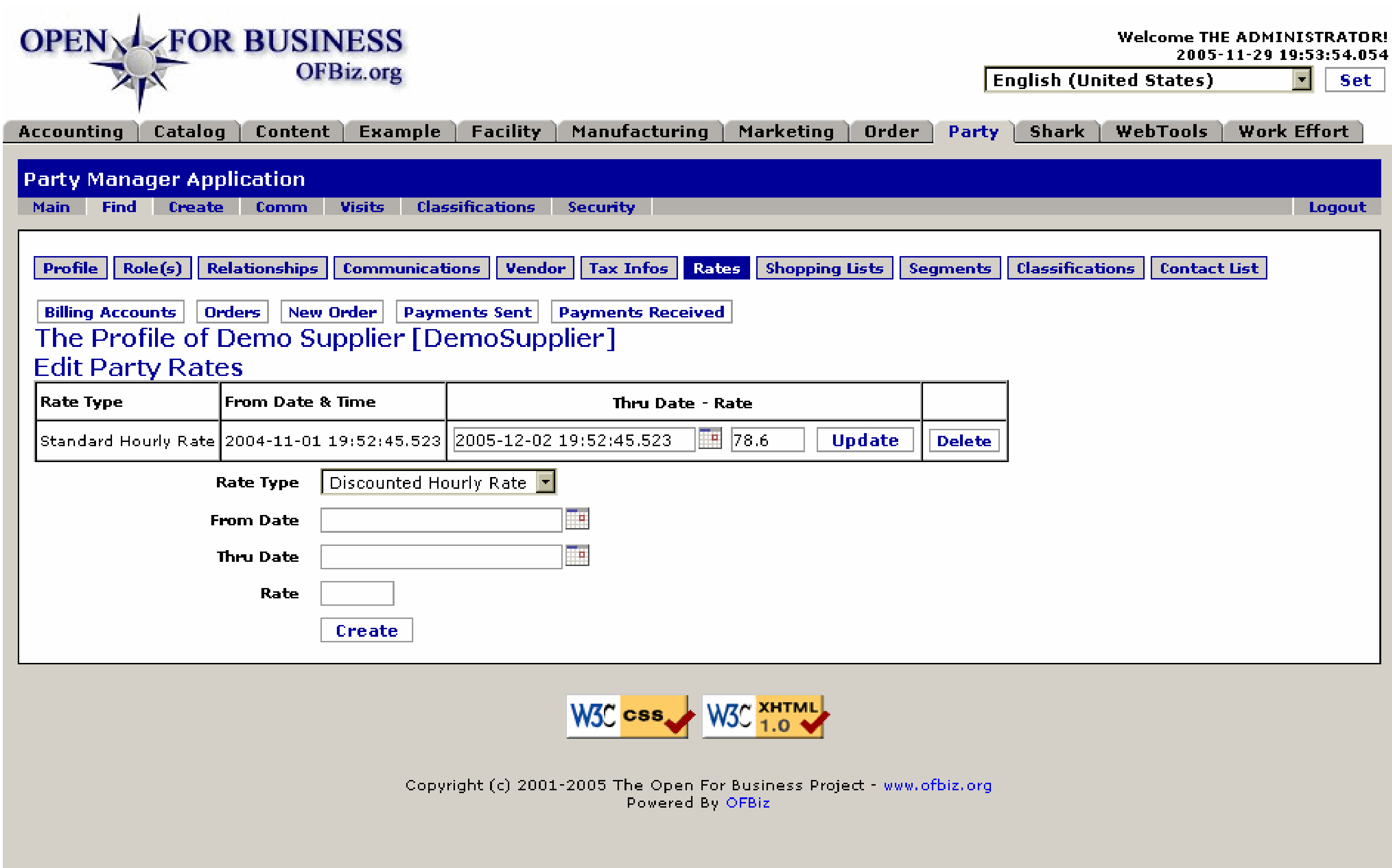
- California requires only short visits to the state (more than seven days in a 12-month period) to create nexus.

As you can see, sales and use tax problems for the small business owner can be quite complex. If you have customers in a state, you must determine if your business conducts any activities in the state that creates nexus.

For some states, acts such as attending a sales convention as a vendor, or visiting a customer in the state on a sales call, will be enough to generate nexus. For many states, hiring employees who work from their homes creates nexus in the employees' home states.

# .4.6 Rates

## .4.6.1 Viewrates




Here you record the hourly rates charged by a Vendor for labor, professional skills, etc.

## .4.6.2 link buttons

[Update] [Delete] [Create] [Billing Accounts] [Orders] [New Order] [Payments Sent] [Payments Received] >[Profile] [Role(s)] [Relationships] [Communications] [Vendor] [Tax Infos] [Rates] [Shopping Lists] [Segments] [Classifications] [Contact List]

## .4.6.3 Table of rates

### .4.6.3.1 Rate Type

Discussed under Tool, below.

### .4.6.3.2 From Date and Time

Discussed under Tool, below.

### .4.6.3.3 Thru Date and Time

Discussed under Tool, below.

### .4.6.3.4 Rate

Discussed under Tool, below.

## .4.6.4 Tool to enter rates

### .4.6.4.1 Rate Type (drop-down box)

Select type of rate. Types could include Standard Hourly Rate, Discounted Hourly Rate, Overtime Hourly Rate, etc.

### .4.6.4.2 From Date (popup calendar)

Rates are always subject to change. Indicate the date when this rate becomes effective.

### .4.6.4.3 Thru Date

Rates seldom remain forever. Indicate when this rate will expire, or through what date the vendor promises this rate.

### .4.6.4.4 Rate

Indicate the rate per hour in your default currency.

## .4.7 Shopping Lists

### .4.7.1 editShoppingList


An active Shopping List can be quickly amended here. Create your own shopping list of items from your Vendors!

### .4.7.2 link buttons

[Edit] [Save] [Update] [Remove] [Add To Shopping List] [Billing Accounts] [Orders] [New Order] [Payments Sent] [Payments

Received] [Create New] [Create Request for Quote] [Create Quote] [Profile] [Role(s)] [Relationships] [Communications] [Vendor] [Tax Infos] [Rates] [Shopping Lists] [Segments] [Classifications] [Contact List]

## .4.7.3 Shopping List (drop-down box)

Until a list is selected, there may be nothing shown under the other headings, below. List Items section may read, 'Empty Shopping List.' So, the first thing to do is identify which List you want to see.

Choose the List from the drop-down box, then click on [Edit]. A Party may have many lists. They should be named to reflect purpose or content.

## .4.7.4 Shopping List Detail -

### .4.7.4.1 List Name

New-List is the default list until named. As you create new lists, their names will appear in the drop-down box. The Name shown here can be edited in this box; be sure to [Save] the new name.

### .4.7.4.2 Description

What is the purpose of this List? Is it a short list of items you will be buying from a certain vendor? Explain that here. Remember that lists are generally created while items are being ordered the first time.

### .4.7.4.3 List Type (drop-down box)

Selections might include:

- —
- Automatic Re-orders
- Frequent Purchases
- Gift Registry
- Special Purpose
- Wish List

### .4.7.4.4 Public? (Y/N)

Maintain privacy of list contents with this toggle.

#### .4.7.4.5 Parent List (drop-down box)

There can be a tree of Shopping Lists. For example, Mom's Shopping Lists might be the Parent of separate lists for Husband, Daughter, Son, Mother, etc.

### .4.7.5 List Items -

#### .4.7.5.1 Product

Click on the Product ID and you are taken to the Catalog Manager > Main tab > Product sub-tab where you can review details about the product.

#### .4.7.5.2 Quantity

This Quantity can be changed. If you are maintaining quick shopping lists of items you order from your vendors, for example, you might record the minimum purchase quantity here. That way you will always re-order the correct minimum from the Vendor.

#### .4.7.5.3 Quantity Purchased

How many of this item has been purchased over time by this party?

#### .4.7.5.4 Price

The List Price, automatically inserted by the system.

#### .4.7.5.5 Total

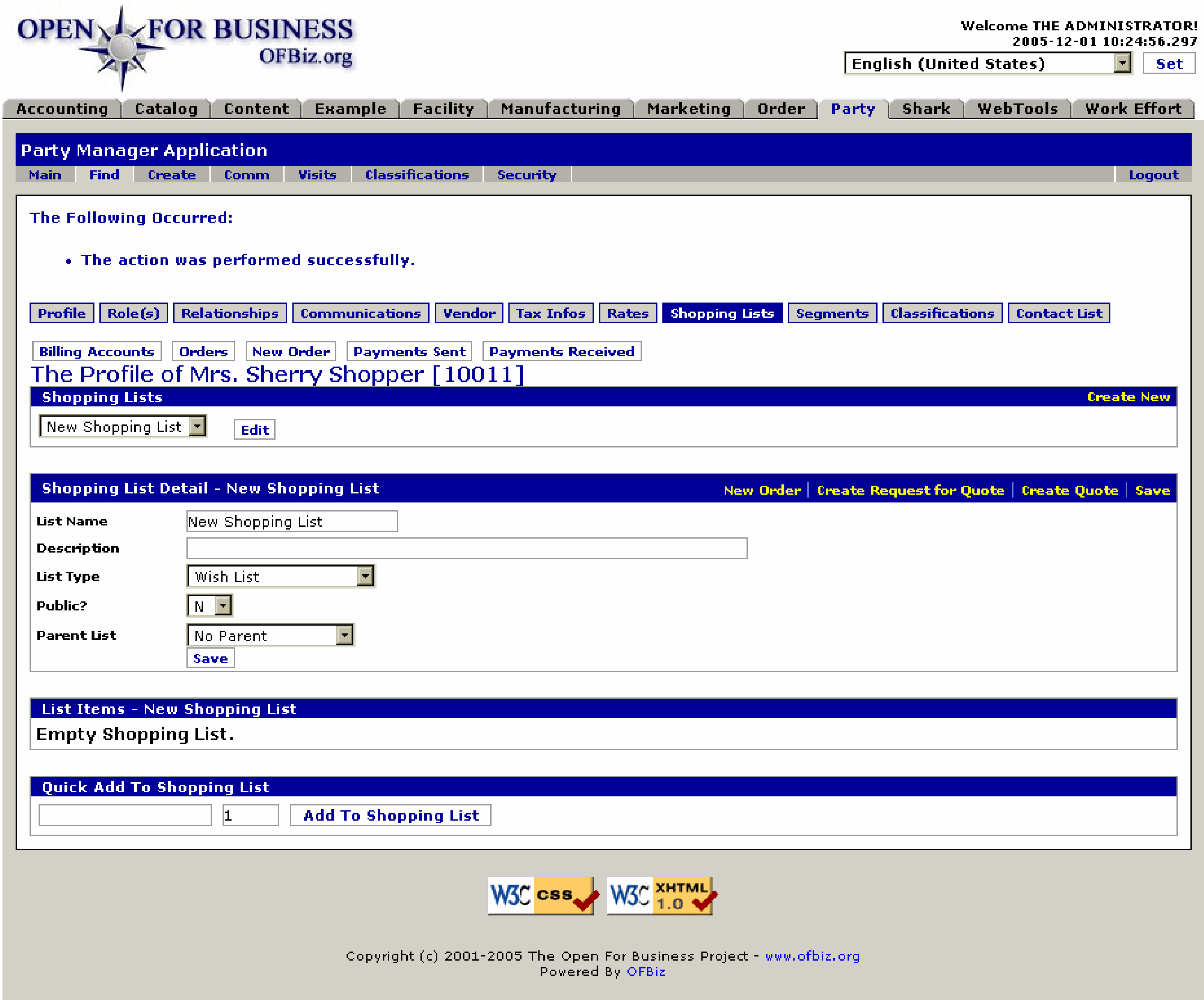
Quantity times the Price creates this number.

### .4.7.6 Quick Add to Shopping List

Enter the Product ID and the quantity desired; click on [Add To Shopping List]. The item will quickly appear in the selected List, above.

## .4.7.7 Create New Shopping List

### .4.7.7.1 createEmptyShoppingList




This is the screen presented for creating a new shopping list.

### .4.7.7.2 Discussion

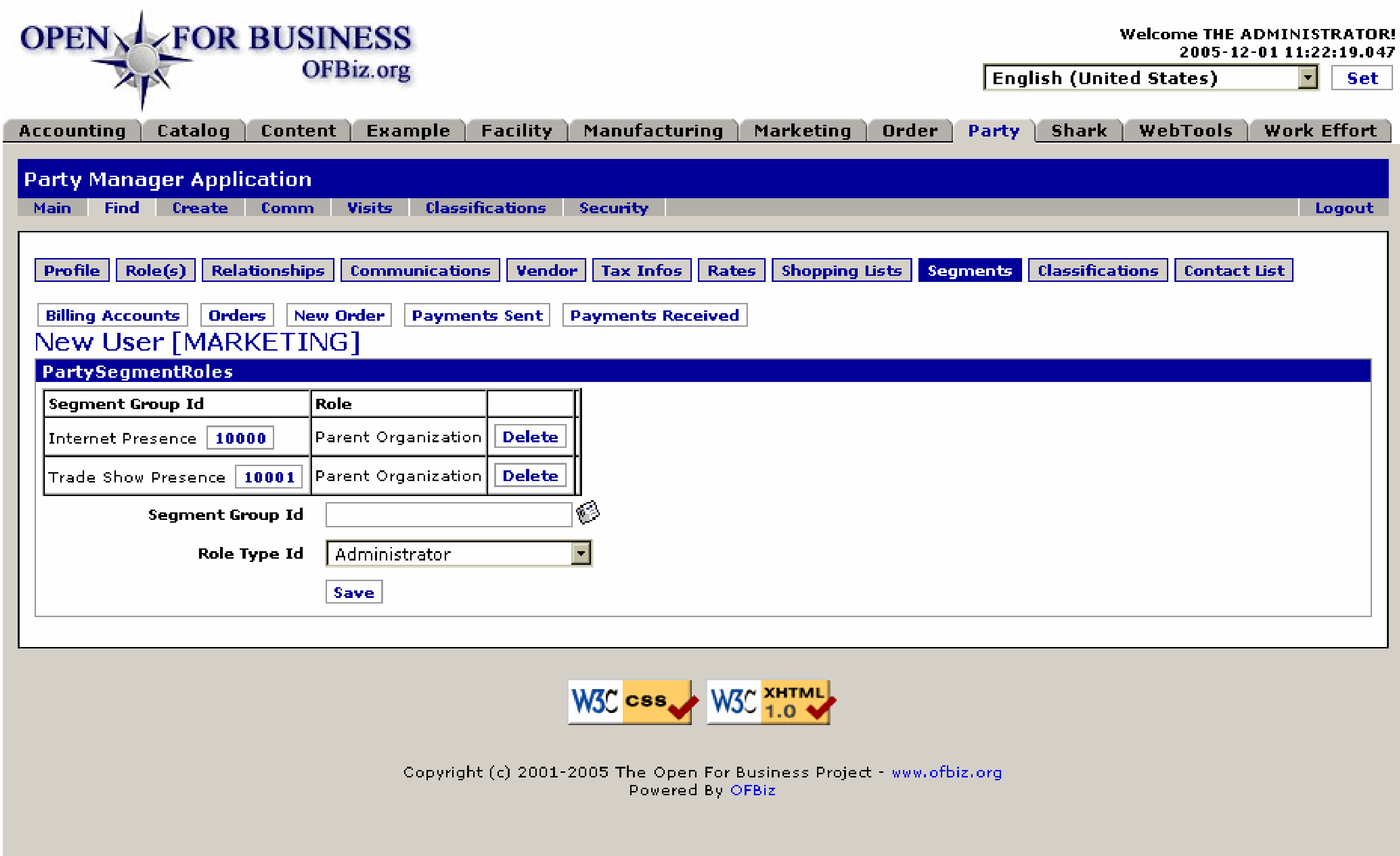
Complete the items under Shopping List Detail and press on the [Save] link to create a new List. You could subordinate (nest) the new List under a previously-created one by selecting its parent from the Parent List drop-down box.

## .4.7.8 'Quote' links

With either the [Create Request for Quote] or the [Create Quote] links, you are taken to the Order Manager to begin the Request or Quotation creation process using the items in the List and/or the Party currently selected.

# .4.8 Segments

## .4.8.1 ViewSegmentRoles




View assignments of Party to Party Segment Roles at this screen; create new assignments of Segment to Party to Role Type ID.

## .4.8.2 link buttons

[Delete] [Save] [Billing Accounts] [Orders] [New Order] [Payments Sent] [Payments Received] [Profile] [Role(s)] [Relationships] [Communications] [Vendor] [Tax Infos] [Rates] [Shopping Lists] [Segments] [Classifications] [Contact List]

## .4.8.3 Table of Segments for this Party

### .4.8.3.1 Segment ID

Segments are classifications created under another Manager. You are identifying them here for the purpose of assigning Roles to Parties related to existing Segments.

The Segment ID was assigned by the system when the Segment was created.

### .4.8.3.2 Party ID

The Party assigned to or associated with an existing Segment.

### .4.8.3.3 Segment Type ID

Descriptive Type assigned or created with the Segment. Given here to confirm that you are assigning the Role to the correct Party-Segment association.

## .4.8.4 Tool to assign Segment and Role

### .4.8.4.1 Segment ID (popup search tool)

Segment ID must already exist before this assignment is attempted. It will only be brought forth here if it is already related with the Party ID you have previously selected before clicking on the Segments tab.

Segments are actually created under the Marketing Manager > Segment tab. In the process, remember that Roles must already be assigned for a Party under the Party > Role(s) tab.

### .4.8.4.2 Party ID

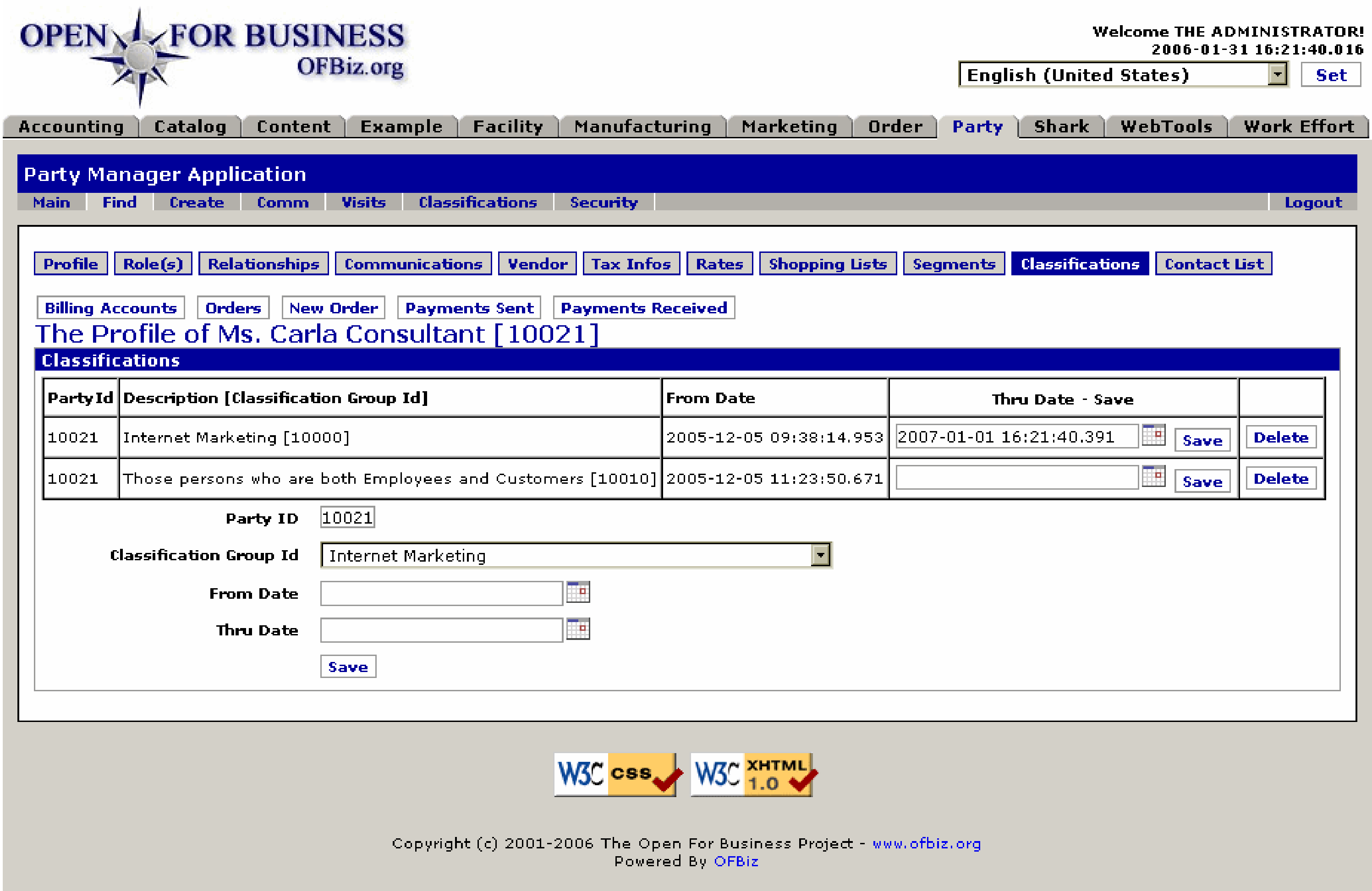
This was already selected with the Find Party function before you came to the Segments tab.

### .4.8.4.3 Role Type ID (drop-down box)

The selection of the Role to be played by your selected Party in relation to the Segment ID is the primary purpose of this Tab. Using the drop-down box, select the Role Type ID and then click on the [Save] button.

## .4.9 Classifications

### .4.9.1 EditPartyClassifications




| |
|---|
| Once a Party has been assigned a Classification, that classification (and any others assigned) appear(s) here in this table. |

### .4.9.2 link buttons

[Delete] [Save] [Billing Accounts] [Orders] [New Order] [Payments Sent] [Payments Received] [Profile] [Role(s)] [Relationships] [Communications] [Vendor] [Tax Infos] [Rates] [Shopping Lists] [Segments] [Classifications] [Contact List]

## .4.9.3 Table of assigned Classifications

### .4.9.3.1 Party ID

This would be the Party you have already selected to be working with.

### .4.9.3.2 Description

Actually the terms of the Classification Group. Classifications are created elsewhere.

### .4.9.3.3 From Date

When the Classification was assigned.

### .4.9.3.4 Thru Date (popup calendar)

This is the only element of the previous assignment you can change. Use the [Save] link next to the calendar link to update the new entry.

## .4.9.4 Tool to assign Classifications

### .4.9.4.1 Party ID

This was already established when you selected the current Party through the Find Party function.

### .4.9.4.2 Classification Group ID (drop-down box)

Select a Classification Group from the drop-down box. These are created under the Classifications tab.

### .4.9.4.3 From Date (popup calendar

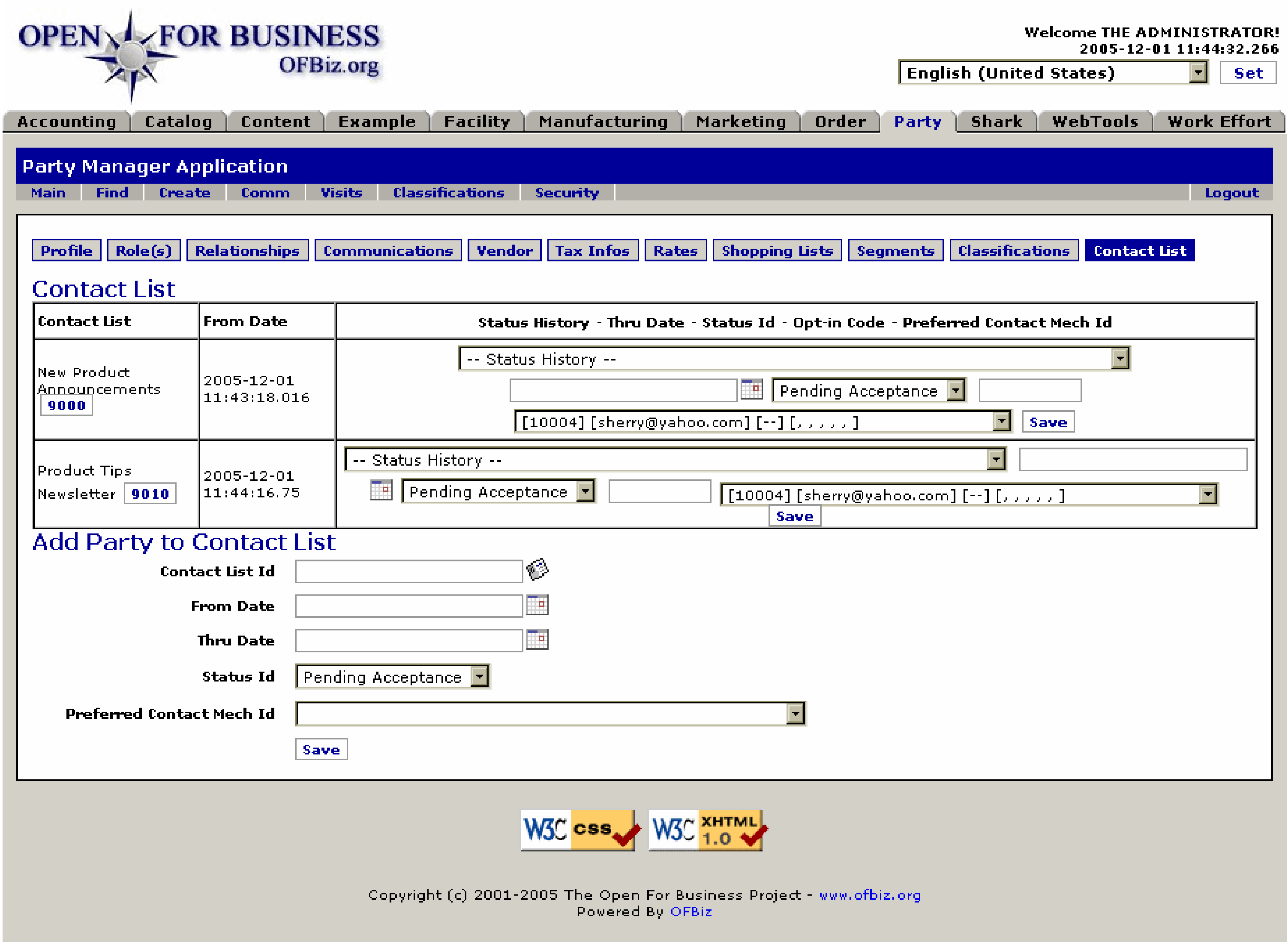
That would generally be now, as you are assigning the Classification Group. You could pre-date or post-date if there were a reason for such.

### .4.9.4.4 Thru Date (popup calendar)

The Classification Group assignment will expire at the time selected.

## .4.10 Contact List

### .4.10.1 ListPartyContactLists




Existing Contact List ID is associated with the current Party or updated from this screen. Create new Contact Lists elsewhere.

### .4.10.2 link buttons

[Save] [Profile] [Role(s)] [Relationships] [Communications] [Vendor] [Tax Infos] [Rates] [Shopping Lists] [Segments]

[Classifications] [Contact List]

## .4.10.3 Table of associated Contact Lists

### .4.10.3.1 Contact List

Click the list ID number to view or edit the actual Contact List.

### .4.10.3.2 From Date

Either the date the list was created or the association was established.

### .4.10.3.3 Status History

Where the status has progressed from Pending Acceptance through Approved, etc.

### .4.10.3.4 Thru Date (popup calendar)

Can be changed. This will be the date the list or its association with the Party will expire.

### .4.10.3.5 Status ID (drop-down box)

Edit here when Status is changed. Use popup calendar to enter date if different than Now.

Possible Status could include one of the following:

- Pending Acceptance
- Accepted
- Rejected

### .4.10.3.6 Opt-in Code

Does the Party agree to receive contact from you through this list? If so, the appropriate Opt-In code needs to be entered before the Party can be accepted to the List.

### .4.10.3.7 Preferred Contact Mech ID (drop-down box)

You may change the Contact Mechanism even after acceptance.

## .4.10.4 Tool to associate Contact Lists

### .4.10.4.1 Contact List ID (popup search tool)

The search tool presents a list of all the existing Contact Lists; select one from among them.

### .4.10.4.2 From Date (popup calendar)

Either today's date or the date of effectivity.

### .4.10.4.3 Thru Date (popup calendar)

When do you wish the association with the Contact List to expire? May be left blank.

### .4.10.4.4 Status ID (drop-down box)

Possible Status could include one of the following:

- Pending Acceptance
- Accepted
- Rejected

### .4.10.4.5 Preferred Contact Mech ID (drop-down box)

Each of the existing Contact Mechanisms for the selected Party will appear in the drop-down list;

## .5 Create

## .5.1 createnew


From the Create tab you can choose which of 5 different types of Party to create. Click on the appropriate link here to begin.

## .5.2 link buttons

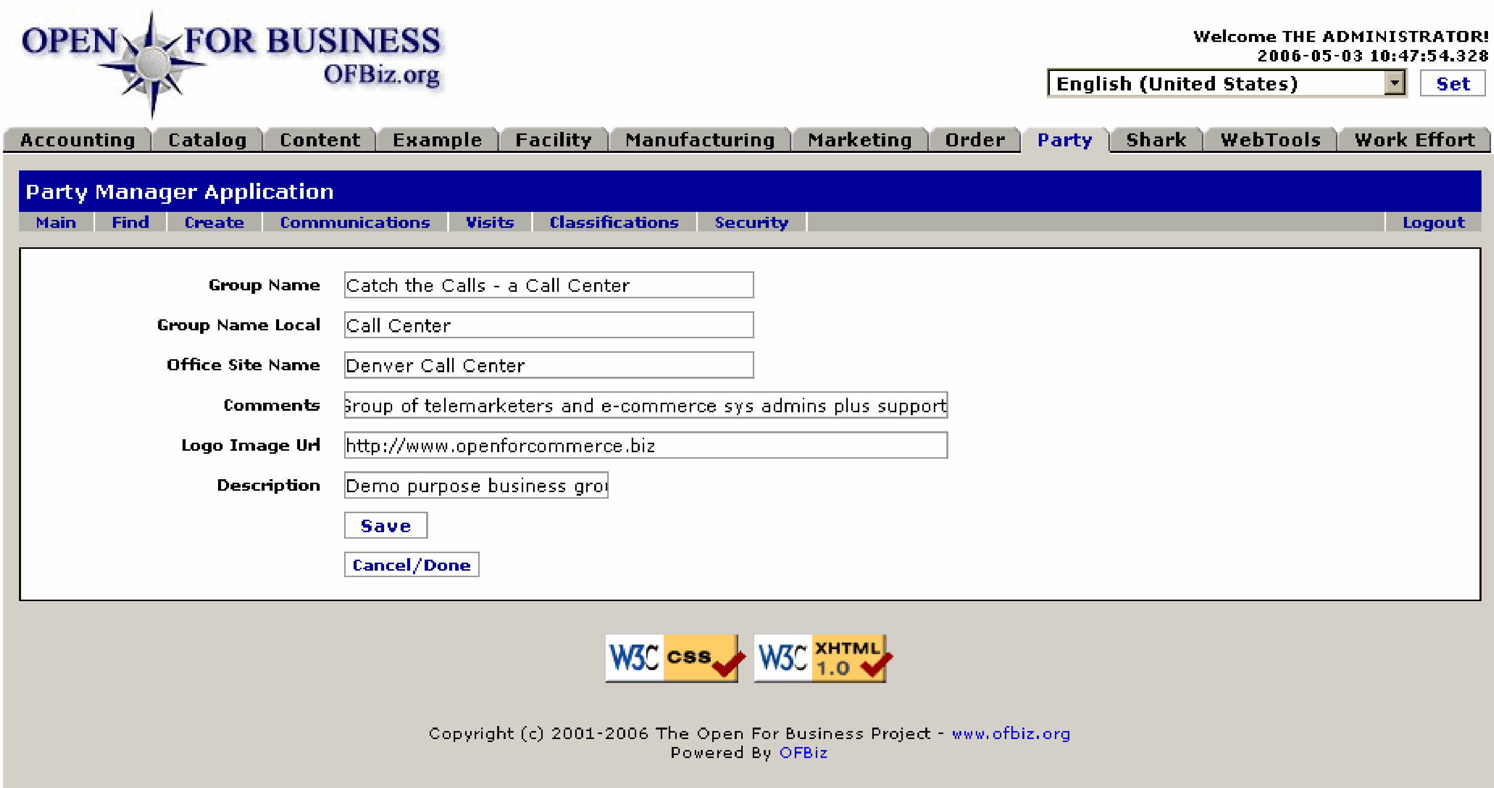
[Create New Party Group] [Create New Person] [Create Customer] [Create Prospect] [Create Employee]

## .5.3 Create New Party Group

### .5.3.1 Discussion

Once created, the Party Group will have a Profile which can be edited and updated from the Party Profile tab. You are taken to that tab when [Save] is selected.

## .5.3.2 editpartygroup




For identification, organization or communication purposes, Groups are always needed. URL is optional.

## .5.3.3 link buttons

[Cancel / Done] [Save]

## .5.3.4 Group Name

Should be a very descriptive Name so that its purpose or function is clearly understood.

## .5.3.5 Group Name Local

What the Group is called casually within the company.

## .5.3.6 Office Site Name

If associated with an office building or floor or area, what that is called. For example, a Group called the Finance Department might be found in the 'Accounting' wing of the 'Main Office Building' so this field could be Main Office Bldg. - Accounting Wing.

### .5.3.7 Comments

Elaborate on the Group Name, explain why the Group exists, etc.

### .5.3.8 Logo Image URL

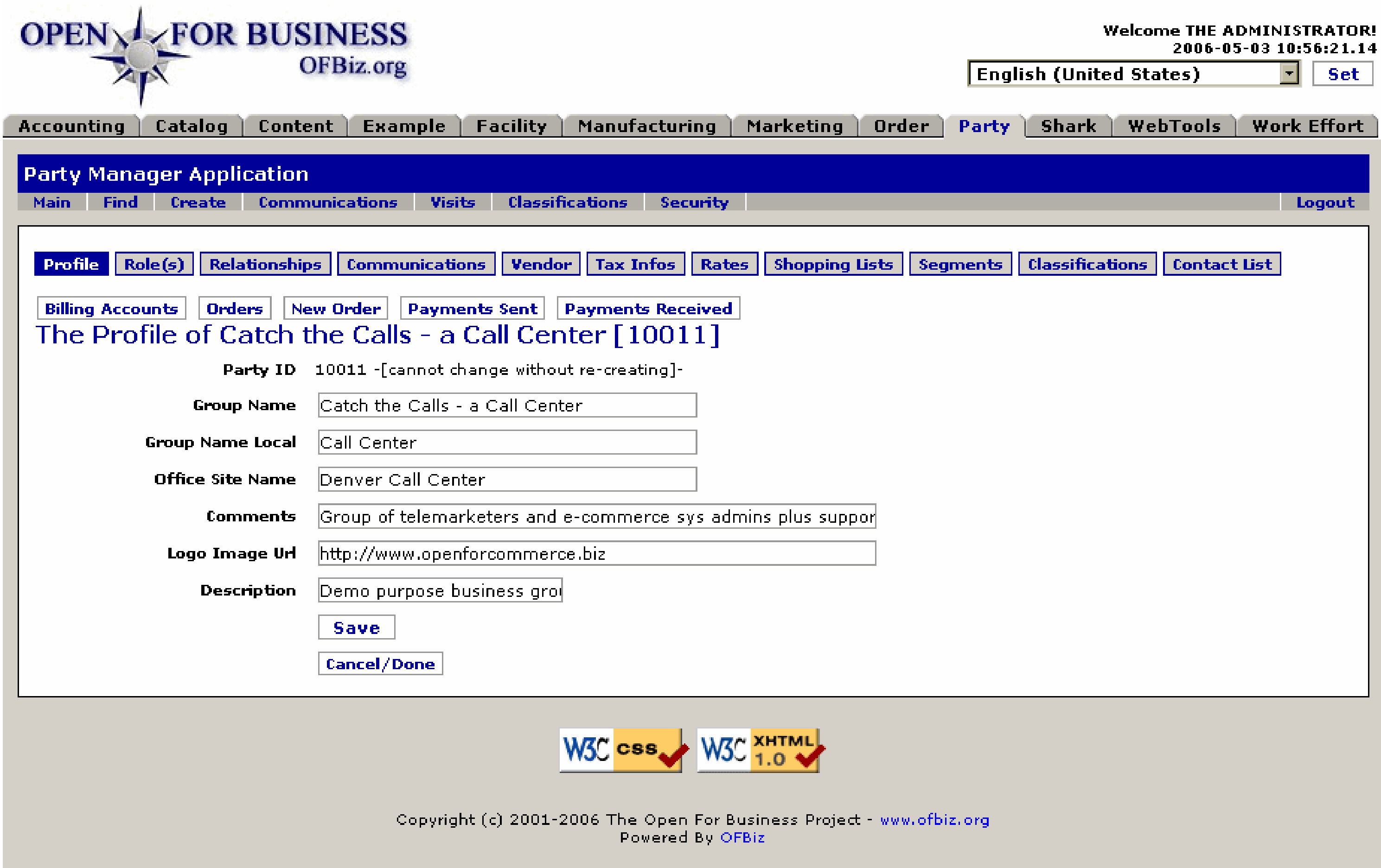
If there is a link to a graphic or a website for this Group, state it here.

### .5.3.9 Description

Here is where you can paint a word picture of what the Group is all about: how it differs from other Groups, itrelationship with others, the primary functions it performs, etc.

## .5.3.10 Group Profile

### .5.3.10.1 viewprofile-group




Group Profile screen is different, but it has the same links as a Party Profile; use the sub-tabs and links to build the Group.

### .5.3.10.2 link buttons

[Save] [Cancel / Done] [Billing Accounts] [Orders] [New Order] [Payments Sent] [Payments Received] [Profile[Role(s)] [Relationships] [Communications] [Vendor] [Tax Infos] [Rates] [Shopping Lists] [Segments] [Classifications] [Contact List]

### .5.3.10.3 Discussion of the Group Profile

The details of the Party Group are presented and edited under Profile and the other sub-tabs shown on the screen.

Those sub-tabs (with links to update or create more data) are discussed in depth under Find, above.

Some sections do not apply; this will always be the case working with generic screens such as these. Use what is appropriate and ignore the other.

Remember that the function of a Group is either (a) to identify or organize a collection of parties; or (b) to create a functionality such as a Department or a major Project which cuts across many Party Groups.

Groups can be nested. Groups can have multiple assignments. Parties or Groups can belong to more than one Group. Use the Roles and the Relationships tabs to create these associations.

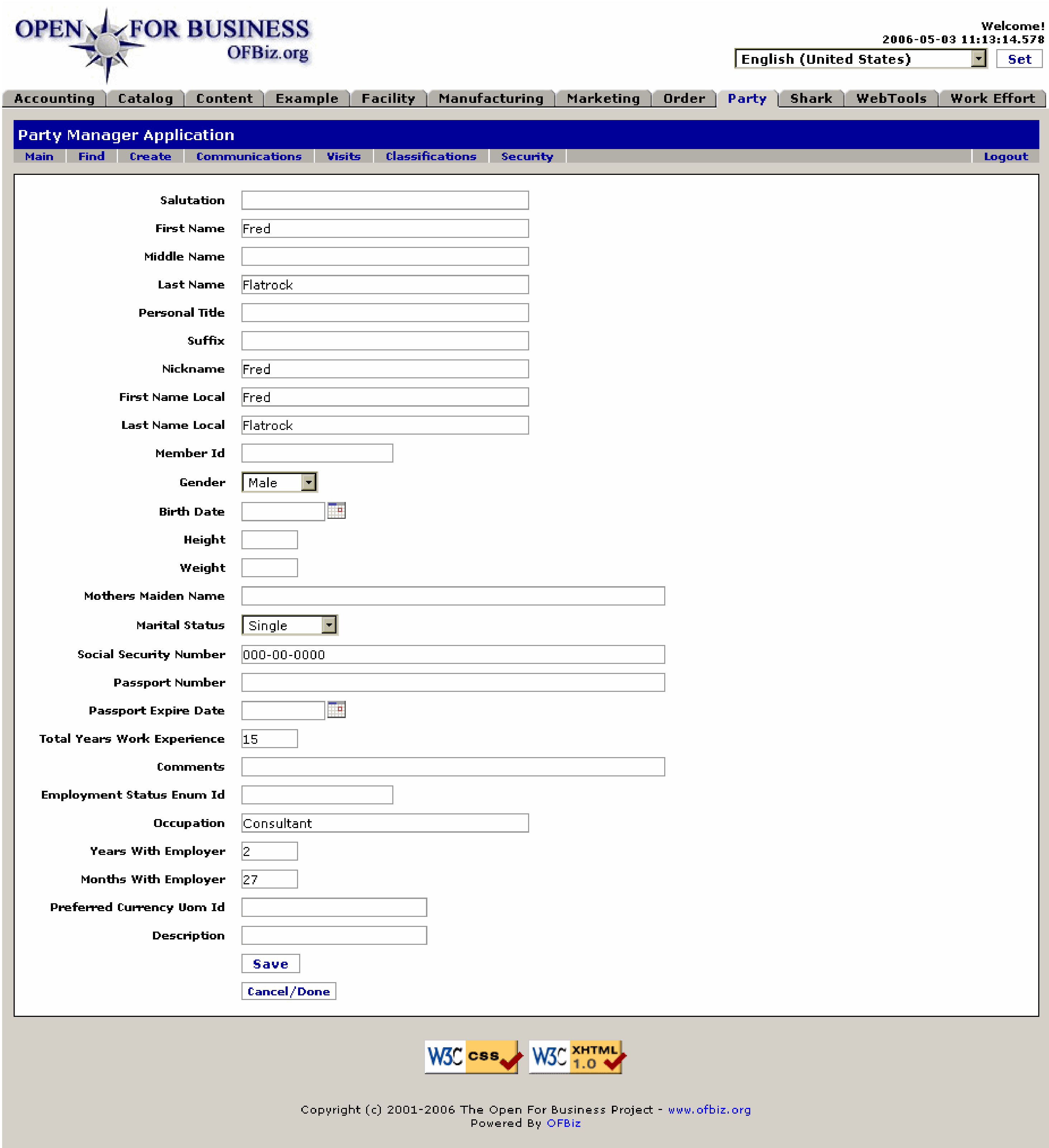
## .5.4 Create New Person

### .5.4.1 Create New Person

Of course, you are not REALLY creating a new person but, as far as the database is concerned, the person does noexist until created at this screen.

NOTE: Do not try to fill every field; they are only presented to give you a place to record the data if it is available and also required by your company.

### .5.4.2 editperson-new




Create (add) a new Party or individual from this screen.

### .5.4.3 link buttons

[Save] [Cancel / Done]

### .5.4.4 Salutation

How the person is to be greeted.

### .5.4.5 First Name

The given name, rather than the family name.

### .5.4.6 Middle Name

If they have a second or middle name, enter that or the initial letter here.

### .5.4.7 Last Name

First and Last Name are the only required fields. Upon clicking [Save], you are taken to the Profile screen from where changes can be made.

### .5.4.8 Personal Title

This could be Mr., Mrs., Dr., Ms., etc.

### .5.4.9 Suffix

This would be Junior, Sr., Esquire, MD, Ph. D., etc.

### .5.4.10 Nickname

Is there another name they prefer to be called? For example, Richard might be known as Dick to many people.

### .5.4.11 First Name Local

If the person uses a different name, say for business or professional purposes, or is simply known by a different name within the company, enter that First Name here.

### .5.4.12 Last Name Local

If the person uses a different name, say for business or professional purposes, or is simply known by a different name within the company, enter that Last Name here.

### .5.4.13 Member ID

If you have some kind of a membership group or other affiliation linkage, their membership identification in that organization can be entered here. This IS NOT the Party ID which will be generated by the system when you click [Save].

### .5.4.14 Gender (drop-down box)

Use the drop-down box to identify their gender.

### .5.4.15 Birth Date (popup calendar)

Either enter as yyyy-MM-dd or let the popup calendar insert it for you.

### .5.4.16 Height

Height and weight can be recorded in US or metric terms.

### .5.4.17 Weight

Height and weight can be recorded in US or metric terms.

### .5.4.18 Mothers Maiden Name

Considered a reliable way to confirm someone claiming to be the party, for example. Usually only the party themselves would know their mother's maiden name. If a person representing themself to be the Party fails to produce this item, they would be suspect.

### .5.4.19 Marital Status (drop-down box)

Choices might include:

- Single
- Married

- Separated
- Divorced
- Widowed

## .5.4.20 Social Security Number

In countries outside the USA, this might be the national identification number.

## .5.4.21 Passport Number

The country of issue could be entered along with the Passport Number.

## .5.4.22 Passport Expire Date (popup calendar)

Especially if you have people working for you needing a valid passport for their travel, this date is important. You can confirm before they leave on a business trip, for example, that their passport will remain valid during their travels.

## .5.4.23 Total Years Work Experience

More likely to be entered when a person will be an employee or a contractor. Might be useful if extending credit to someone.

## .5.4.24 Comments

You can place any information here that does not fit under another topic regarding this Party.

## .5.4.25 Preferred Currency Uom ID

Especially outside the US, individuals will have a preference for which national currency they use; enter that here.

## .5.4.26 Description

If useful for your purposes, a Description of the person can be entered here.

# .5.5 Create Customer

## .5.5.1 Discussion

One obvious difference between creating a Customer and creating a Person or Employee is that this screen immediately asks for the Contact information - addresses, phone numbers, etc.

Username and Password are initially populated with data valid for the party creating the new customer information. Replace that with the customer's username and password or you will receive an error message that the username is already assigned.

### .5.5.2 newcustomer

OPEN FOR BUSINESS
OFBiz.org

Welcome THE ADMINISTRATOR!
2005-12-02 07:52:49.48
English (United States) | Set

Accounting | Catalog | Content | Example | Facility | Manufacturing | Marketing | Order | Party | Shark | WebTools | Work Effort

**Party Manager Application**

Main | Find | Create | Comm | Visits | Classifications | Security | Logout

### Create Customer

| | |
|---|---|
| **Title** | Mr. |
| **First Name** | Charles -[*]- |
| **Middle Initial** | E |
| **Last Name** | Customer -[*]- |
| **Suffix** | |
| **Mailing/Shipping Address** | |
| Address Line 1 | 53 West Center Street -[*]- |
| Address Line 2 | Unit 1546 |
| City | Orem -[*]- |
| State | State: [UT] Utah -[*]- |
| Zip/Postal Code | 84058 -[*]- |
| Country | USA: United States -[*]- |
| Allow Address Solicitation? | Y |
| **Home Phone Number** | |
| Country Code | |
| Area Code | 801 |
| Phone Number | 555-8764 |
| Extension | |
| Allow Solicitation? | Y |
| **Work Phone Number** | |
| Country Code | |
| Area Code | 801 |
| Phone Number | 555-9832 |
| Extension | |
| Allow Solicitation? | N |
| **Fax Number** | |
| Country Code | |
| Area Code | 801 |
| Phone Number | 555-2356 |
| Extension | |
| Allow Solicitation? | N |
| **Mobile Phone Number** | |
| Country Code | |
| Area Code | 801 |
| Phone Number | 555-7777 |
| Allow Solicitation? | N |
| **Email Address** | |
| Email | CECustomer@mybox.info -[*]- |
| Allow Solicitation? | Y |
| **Username** | charley -[*]- |
| **Password** | ***** -[*]- |
| **Password** | ***** -[* Confirm]- |
| | Fields marked with (*) are required. |
| | Save |

W3C CSS W3C XHTML 1.0



Customers are added to the database through this screen. Also create their user login for the ecommerce site in the process.

### .5.5.3 link buttons

[Save]

### .5.5.4 Title

Mr., Ms., etc.

### .5.5.5 First name *

This is the given name, not the Patronymic.

* The field is Required.

### .5.5.6 Middle Initial

If there is a second or middle name, enter the initial letter here.

### .5.5.7 Last Name *

This is the Family name, the last name in the English tradition.

* The field is Required.

### .5.5.8 Suffix

Here will be entered terms such as Jr., Esq., M.D., Ph. D., etc.

### .5.5.9 Mailing / Shipping Address

#### .5.5.9.1 Address Line 1 *

The mailing or delivery address. If there is only one line of address, enter it here.

* This field is required.

### .5.5.9.2 Address Line 2

When the address requires two lines, enter the second one here. Do not use this line if there is only one needed.

### .5.5.9.3 City *

The name of the town, city or community is in a * required field.

### .5.5.9.4 State (drop-down box) *

Use the drop-down box to locate and select the region, state or province in this * required field.

### .5.5.9.5 ZIP/Postal Code

Required field.

### .5.5.9.6 Country (drop-down box) *

Select the country from the drop-down box for this * required field.

### .5.5.9.7 Allow Address Solicitation? (Y/N)

The question of Soliciting is important for two reasons. First, it provides Marketing with an identifiable lead for marketing targets. Second, it protects the company by identifying those parties within the database who have expressly stated their desire NOT to receive advertisements. You should ascertain from each Party their wishes on this subject. This is known as an Opt-In choice.

## .5.5.10 Phone Numbers

NOTE: Each of the phone and fax number lines have a drop-down box to mark the customer's desires regarding solicitation. Read the comment above under Address Solicitation; the same policy applies to the phone and fax numbers but, while the customer might accept mailed advertisements, they might not welcome phone calls or faxes.

Confirm for each item or assume the answer is NO.

### .5.5.10.1 Home Phone Number

The telephone at the place of residence.

The following information is to be entered:

- Country Code and this is NOT the Area Code!
- Area Code
- Phone Number - all 7 numbers in the US - 555-1234
- Extension
- Allow Solicitation? Y/N (drop-down box) Confirm this item!

## .5.5.10.2 Work Phone Number

The telephone at the place of employment.

The following information is to be entered:

- Country Code and this is NOT the Area Code!
- Area Code
- Phone Number - all 7 numbers in the US - 555-1234
- Extension
- Allow Solicitation? Y/N(drop-down box) Confirm this item!

## .5.5.10.3 Fax Number

The facsimile (fax) telephone number where the party can receive a fax. The following information is to be entered:

- Country Code and this is NOT the Area Code!
- Area Code
- Phone Number - all 7 numbers in the US - 555-1234
- Extension
- Allow Solicitation? Y/N (drop-down box) Confirm this item!

## .5.5.10.4 Mobile Phone Number

The cell phone or mobile phone carried by the customer. The following information is to be entered:

- Country Code and this is NOT the Area Code!
- Area Code
- Phone Number - all 7 numbers in the US - 555-1234
- Allow Solicitation? Y/N (drop-down box) Confirm this item!

## .5.5.11 Email address *

Required field.

NOTE: The e-mail address line also has a drop-down box to mark the customer's desires regarding solicitation. Read the comment above under Address Solicitation; the same policy applies to the e-mail address. Confirm acceptance or assume the answer is NO.

If there is a company policy to contact customers with e-mail updates regarding products, prices or policies, let the customer know to expect such mailings.

### .5.5.12 Username *

Required field. Confirmed by email to the customer when a new account is approved.

NOTE: When this screen is brought up, the username of the party making the entry will appear here. Replace that with the new username or you will receive an error message.

### .5.5.13 Password *

Required field. Create a suitable password.

NOTE: When this screen is brought up, the password of the party making the entry will appear here as a series of asterisks (*****). Replace that with the new username or you will receive an error message.

### .5.5.14 Password * (confirming)

Re-enter the password to confirm before the system locks it in.

NOTE: When this screen is brought up, the password of the party making the entry might appear here as a series of asterisks (*****). Replace that with the new username or you will receive an error message.

## .5.6 Create Prospect

Except for the label in the upper LH corner, the form for Create Prospect is the same as the one for Create Customer and Create Employee. See the explanations of the fields above under Create Customer.

Differentiation between Customers, Prospects, and Employees is accomplished with the screens for Role(s), Relationships, and Contact Lists.

There you can refine the Party data to accommodate the differences in needs.

## .5.7 Create Employee

Except for the label in the upper LH corner, the form for Create Employee is the same as the one for Create Customer and Create Prospect. See the explanations of the fields above under Create Customer.

Differentiation between Customers, Prospects, and Employees is accomplished with the screens for Role(s), Relationships, and Contact Lists.

There you can refine the Party data to accommodate the differences in needs.

You might prefer to use the form for Create Person as that has some fields not found here which might be useful with an employee.

# .5.8 Create Contact Mechanisms

## .5.8.1 EditContactMech-new


New contact mechanisms are begun at this screen after a Party is selected. Choose type from the drop-down box.

## .5.8.2 link buttons

[Create] [Go Back]

## .5.8.3 Discussion

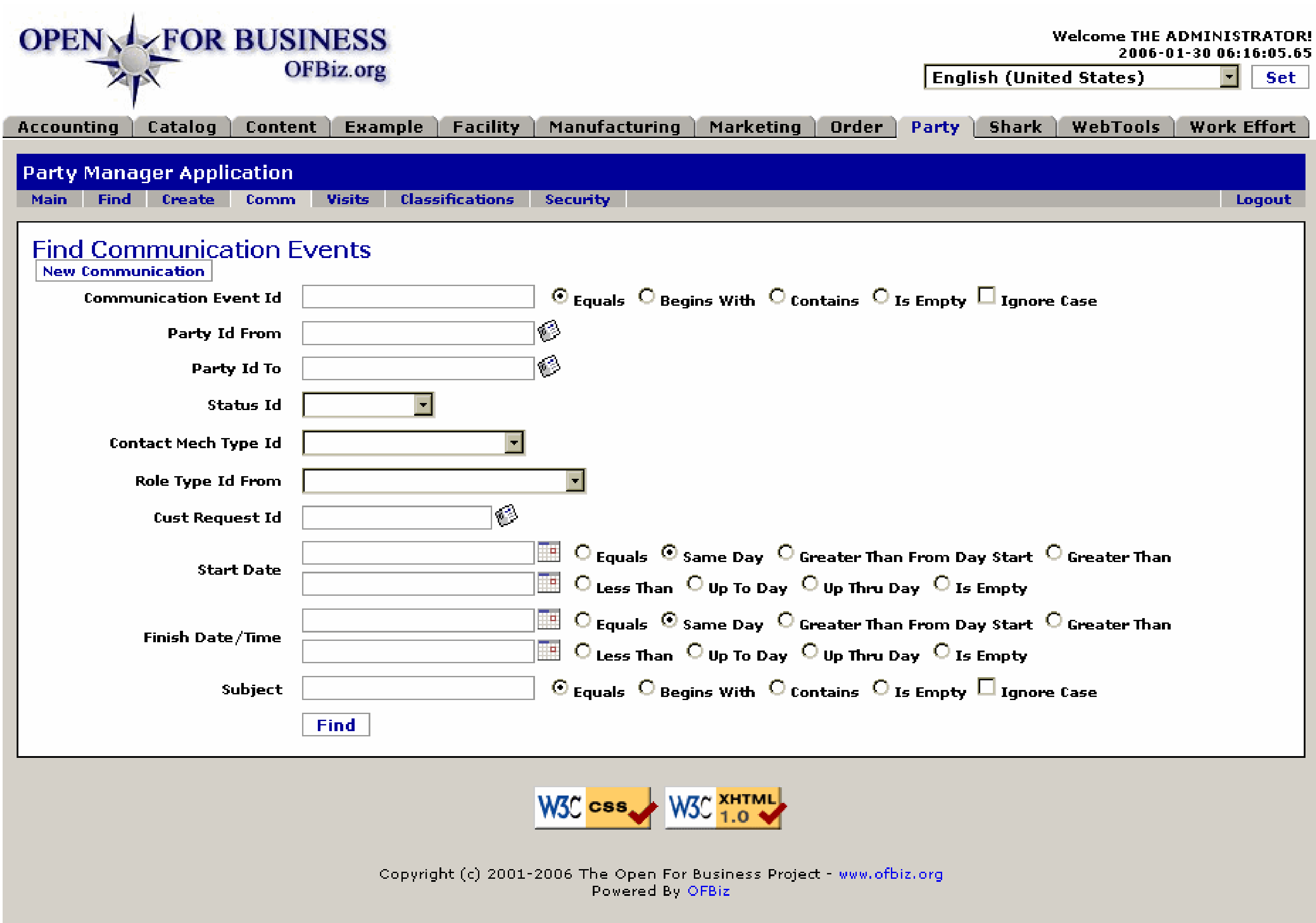
When a Party has been selected, this screen appears after clicking on a [Create] link. Select the type of contact mechanism you wish to create or add from the drop-down box, complete as much information as you have at that screen, then click [Save]. After each new Contact Mechanism has been created, you have an option presented for you to [Go Back] where you can choose another type. See the discussion of these screens under the Find topic, Profile > Contact Information > Edit Contact Mechanism section, above.

Choices available for a new Contact Mechanism include the following:

- Electronic Address
- Postal Address
- Phone Number
- Email Address
- Internet IP Address
- Internet Domain Name
- Web URL/Address

# .6 Comm

## .6.1 FindCommunicationEvents




First screen under the Comm tab. Enter search parameters then click on [Find].

## .6.2 link buttons

[New Communication] [Find]

## .6.3 Search tool parameters

### .6.3.1 Discussion

Assumptions for the use of this tool are these:

1. You know that a communication event was documented in the system.
2. You have at least one of the pieces of information requested in the search tool.

Enter as few parameters as possible to bring up the Event. Ideally you will have the Communication Event ID number, which is what the search is trying to recover. If not, you would know who the communication was to or who it was from; enter one of those IDs and a table with all communications to or from that party will be presented. If those items are unknown, try to use one of the other parametric search items, paying attention to the Radio Buttons.

If you click on [Find] without entering any parameters, ALL existing Comm events will be presented. The screen shown below (ListLookupCommEvents) shows a small snapshot of the variety of Comm Events that could be displayed.

### .6.3.2 Communication Event ID

If you have the ID, enter it and that will be the only Event listed in the table of results. Use the radio buttons to reflect your entry.

This field is more than a place to enter what you might not know. For example, if you knew that the last 2 digits were 10, enter that with the radio button 'Contains' selected. Likewise, if the ID began with 'QU', select the 'Begins With' radio button and you will get a table with all the QU comm events. You could reduce that with a date range parameter entered as well.

### .6.3.3 Party ID From

If you know who created the Communication, enter that here. You can use the popup search tool to find the Party ID if you only know the person's name or login ID.

### .6.3.4 Party ID To

The recipient of the communication.

### .6.3.5 Status ID

If you know the last entered Status of your Communication, you can enter that parameter. Status IDs include the following:

- Entered
- Pending
- Read
- In-Progress
- Complete
- Resolved
- Referred
- Cancelled

### .6.3.6 Contact Mech Type ID (drop-down box)

Was this a phone call? an email? a letter? Select the contact mech from the drop-down box. All of the standard mechanisms are listed there.

### .6.3.7 Role Type ID From (drop-down box)

What Role was used by the Party which originated the communication? Was she the Blog Editor? Was he the Administrator? Select from the drop-down box.

### .6.3.8 Cust Request ID

Was this communication in response to a Customer Request? Do you have the Request ID? Enter that here.

### .6.3.9 Start Date (popup calendars)

Did the communication discuss a calendar event with a specified start date? Enter that here, but use the two calendars and bracket the date and time. You might need to alter the time because the popup calendar will put in the date you choose but the time is Now. Use time format 0:00:00.000 which is H:MM:SS.0

For example, if you think the date was around noon on December 1, 2005, in the top calendar enter November 30, 2005, then select radio button 'Greater Than From Day.' With the other calendar, enter December 3, 2005, then select radio button 'Up Thru Day.'

### .6.3.10 Finish Date / Time (popup calendars)

Did the communication discuss a calendar event with a specified finish date? Enter that here, but use the two calendars and bracket the date and time. You might need to alter the time because the popup calendar will put in the date you choose but the time is Now. Use time format 0:00:00.000 which is H:MM:SS.0

For example, if you think the finish date was around noon on December 5, 2005, in the top calendar enter December 4, 2005, then select radio button 'Greater Than From Day.' With the other calendar, enter December 6, 2005, then select radio button 'Up Thru Day.'

## .6.3.11 Subject

When you know the subject or part of the subject, enter it here. Use the radio buttons to reflect your entry.

# .6.4 Found CommEvents

## .6.4.1 ListLookupCommEvents

OPEN FOR BUSINESS OFBiz.org

Welcome THE ADMINISTRATOR!
2006-01-31 10:31:15.281
English (United States) Set

Accounting Catalog Content Example Facility Manufacturing Marketing Order Party Shark WebTools Work Effort

Party Manager Application

Main Find Create Comm Visits Classifications Security Logout

Found Communication Events

New Communication New Find

| Communication Event Id | CommonPartyId From | CommonPartyId To | Status Id | Contact Mech Type Id | Role Type Id From | Role Type Id To | Start Date | Finish Date/Time | Cust Request Id | Subject | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| 10000 | THE ADMINISTRATOR [admin] | Sherry Shopper [10011] | Entered | Email Address | | | | | | OFBiz Demo - Your Order Is Complete #WS10000 | Delete |
| 10010 | Loyal Employee [10023] | THE ADMINISTRATOR [admin] | In-Progress | Electronic Address | Non-exempt (Hourly) Manager | Administrator | | 2006-01-03 10:58:20.465 | | Request for Vacation between Holidays | Delete |
| 10020 | Blog Editor [BLOG_EDITOR] | Carla Consultant [10021] | In-Progress | Electronic Address | Blog Editor | Contractor | 2006-01-05 08:15:23.312 | | | February Newsletter | Delete |
| 10030 | THE ADMINISTRATOR [admin] | Roger Ready [10120] | Complete | Email Address | | | | | | OFBiz Demo - Your Order Is Complete #WS10040 | Delete |
| 10040 | THE ADMINISTRATOR [admin] | Sherry Shopper [10011] | Complete | Email Address | | | | | | OFBiz Demo - Your Order Is Complete #WS10050 | Delete |

W3C CSS W3C XHTML 1.0

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Powered By OFBiz

Here is a Table of pending, active and completed Communication Events. Click on the Communication EventID # to view or edit.

## .6.4.2 link buttons

[New Communication] [New Find] [Delete]

## .6.4.3 Table of communication events

### .6.4.3.1 Communication Event ID

Click on this number to view or edit the communication.

### .6.4.3.2 Common Party ID From

Who originated the communication.

### .6.4.3.3 Common Party ID To

To whom the communication was addressed.

### .6.4.3.4 Status ID

The status could be shown as one of the following:

- Entered
- Pending
- Read
- In Progress
- Complete
- Resolved
- Referred
- Cancelled

### .6.4.3.5 Contact Mech Type ID

What was the method of communication: Phone, Email, etc.?

### .6.4.3.6 Role Type ID From

The Role Type of the party originating the communication.

### .6.4.3.7 Role Type ID To

The Role Type of the recipient of the communication.

#### .6.4.3.8 Start Date

Beginning of any period of activity discussed in the communication; need not be the origin date of the communication.

#### .6.4.3.9 Finish Date / Time

When the communication process will completed, or when the action discussed in the communication needs to be accomplished.

#### .6.4.3.10 Cust Request ID

If this is in response to a Customer Request, that ID will be here.

#### .6.4.3.11 Subject

What was the communication about.

## .6.5 Edit Communication Event

### .6.5.1 Discussion

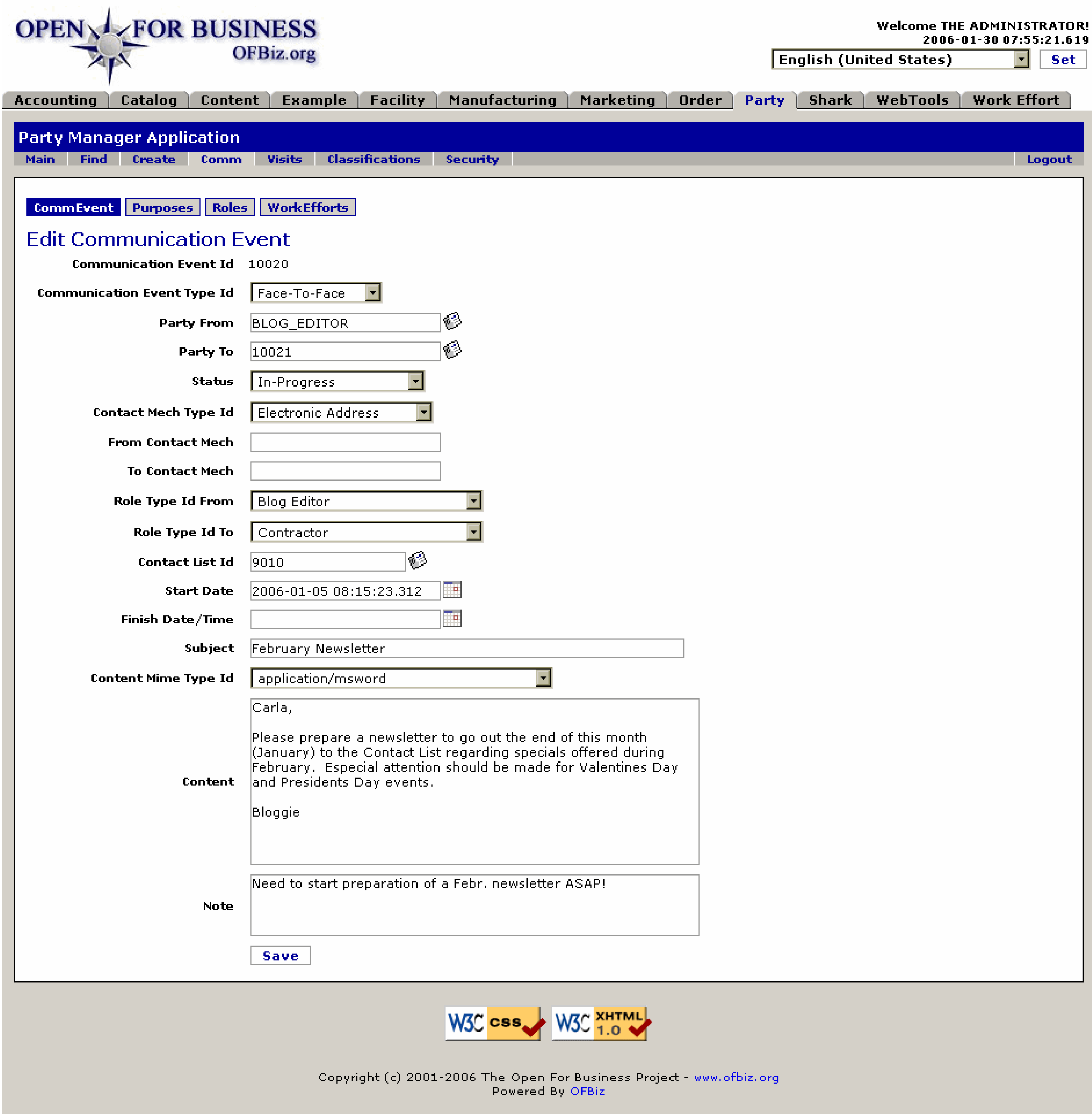
Clicking on the Communications sub-tab under the Find tab takes you directly to the Party Manager > Comm > Communications > CommEvent sub-tab.

Existing Communications with a selected Party are given in a table here. If you click on the Communication Event ID, you are taken to the same screen as [New Communication], except that established fields are already populated. Click on the Party ID to go to the Party Profile screen.

When you have identified the Communications Event ID, you can use the other sub-tabs to navigate through the Edit screen and on to Purposes and Roles. If the communication is connected with a Quotation, WorkEfforts and CustRequests tabs give you more access to the Communication.

## .6.5.2 CommEvent

### .6.5.2.1 EditCommunicationEvent-commtab




Edit Comm Event under the Comm tab brings up the row of sub-tabs to provide tools for recording Comm Events.

### .6.5.2.2 link buttons

[Save] [CommEvent] [Purposes] [Roles] [WorkEfforts]

### .6.5.2.3 Communication Event ID

Do not change or you will be creating a New Event.

### .6.5.2.4 Communication Event Type ID (drop-down box)

Select from one of the following to define the Type of a Communication Event that this is:

- —
- Comment/Note
- Email
- Face-To-Face
- Fax
- Letter
- Phone
- Web Site

### .6.5.2.5 Party ID From (popup search tool)

Use the popup search tool to identify the Party initiating or originating the Communication.

### .6.5.2.6 Party ID To (popup search tool)

Use the popup search tool to identify the Party receiving or corresponding in the Communication.

### .6.5.2.7 Status (drop-down box)

The status could be selected from one of the following; note that the Status options presented in the list will vary depending upon the progress of the Communication Entered

- —
- Set Pending (Pending)
- Pending
- Read
- In Progress

- Complete
- Resolved
- Referred
- Cancel (Cancelled)
- Cancelled

### .6.5.2.8 Contact Mech Type Id (drop-down box)

What communication method (Contact Mechanism) will be used for this iteration of this communication? Select from the drop-down box. Choices might include the following:

- —
- Electronic Address
- Email
- Address
- Internet Domain Name
- Internet IP Address
- Phone Number
- Postal Address
- Web/URL Address

### .6.5.2.9 From Contact Mech

The preferred Contact Mech or the one used in receiving the most recent iteration of this communication.

### .6.5.2.10 To Contact Mech

The preferred Contact Mech or the one used in sending the most recent iteration of this communication.

### .6.5.2.11 Role Type ID From (drop-down box)

Select the Role being performed by the Originator from the drop-down box. If an appropriate Role is not listed in the drop-down box, you can create one.

1. Go to the Party Manager > Find tab.
2. Select any Party.
3. From the viewprofiles screen, select the Roles tab.
4. Use the tool at the bottom of the viewroles screen for creating a new Role.

### .6.5.2.12 Role Type ID To (drop-down box)

From the drop-down box, select the Role in which the Recipient is receiving the Communication.

### .6.5.2.13 Contact List ID (popup search tool)

If the Communication is to be broadcast to members of a Contact List, use the search tool to identify and select thContact List ID.

### .6.5.2.14 Customer Request #

If this Communication Event is part of a Request, the number will appear here. If there is no field given, then thCommunication did not originate in the Request function.

### .6.5.2.15 Start Date (/Time) (popup calendar)

Enter the time of origin for this Communication.

### .6.5.2.16 Finish Date /Time (popup calendar)

This could be the date and time when the Communication is Complete, Referred, Resolved or Cancelled.

### .6.5.2.17 Subject

This should be short and concise.

### .6.5.2.18 Content Mime Type Id (drop-down box)

What form or format was used in preparation of the communication content? (Use the drop-down box to identify.)

### .6.5.2.19 Content

This is where the 'meat' of the 'event' is recorded. You may copy and paste from other sources or manually enter or provide a link to a file, etc.

### .6.5.2.20 Note

Here will go the background, the references, or whatever supporting material you wish to append to the content of the message itself.

## .6.5.3 Purposes

### .6.5.3.1 UpdateCommPurposes


Add or delete a Purpose Type to the Comm Event here. There may be multiple Purposes assigned to a single Comm Event.

### .6.5.3.2 link buttons

[Delete] [Add Purpose] [CommEvent] [Purposes] [Roles] [WorkEfforts]

### .6.5.3.3 Communication Event Purposes

The only column in this List is Communication Event Prp Typ ID; remove any Purpose from the list using the [Delete] link, or add a new Purpose Type with the tool below.

### .6.5.3.4 Communication Event Prp Typ ID (drop-down box)

Select an Event Purpose Type from the drop-down box. When matched with the correct Party ID, click on [Add Purpose].

Purposes listed might include the following:

- Activity Request
- Conference
- Customer Service Call
- Inquiry
- Meeting
- Sales Follow Up
- Seminar
- Support Call

## .6.5.4 Roles

### .6.5.4.1 UpdateCommRoles


Specify the Roles of each Party involved in a Communication here.

### .6.5.4.2 link buttons

[Delete] [Add Role] [CommEvent] [Purposes] [Roles] [WorkEfforts]

### .6.5.4.3 Communication Event Roles

#### .6.5.4.3.1 Party ID

Which Party has this role as related to the Communication Event.

#### .6.5.4.3.2 Role Type ID

Which Role Type has been assigned to this Party for this Comm Event.

### .6.5.4.4 Add Communication Event Role

#### .6.5.4.4.1 Party ID (popup search tool)

Identify the Party, either by entering their Party ID or selecting from the popup tool.

#### .6.5.4.4.2 Role Type ID (drop-down box)

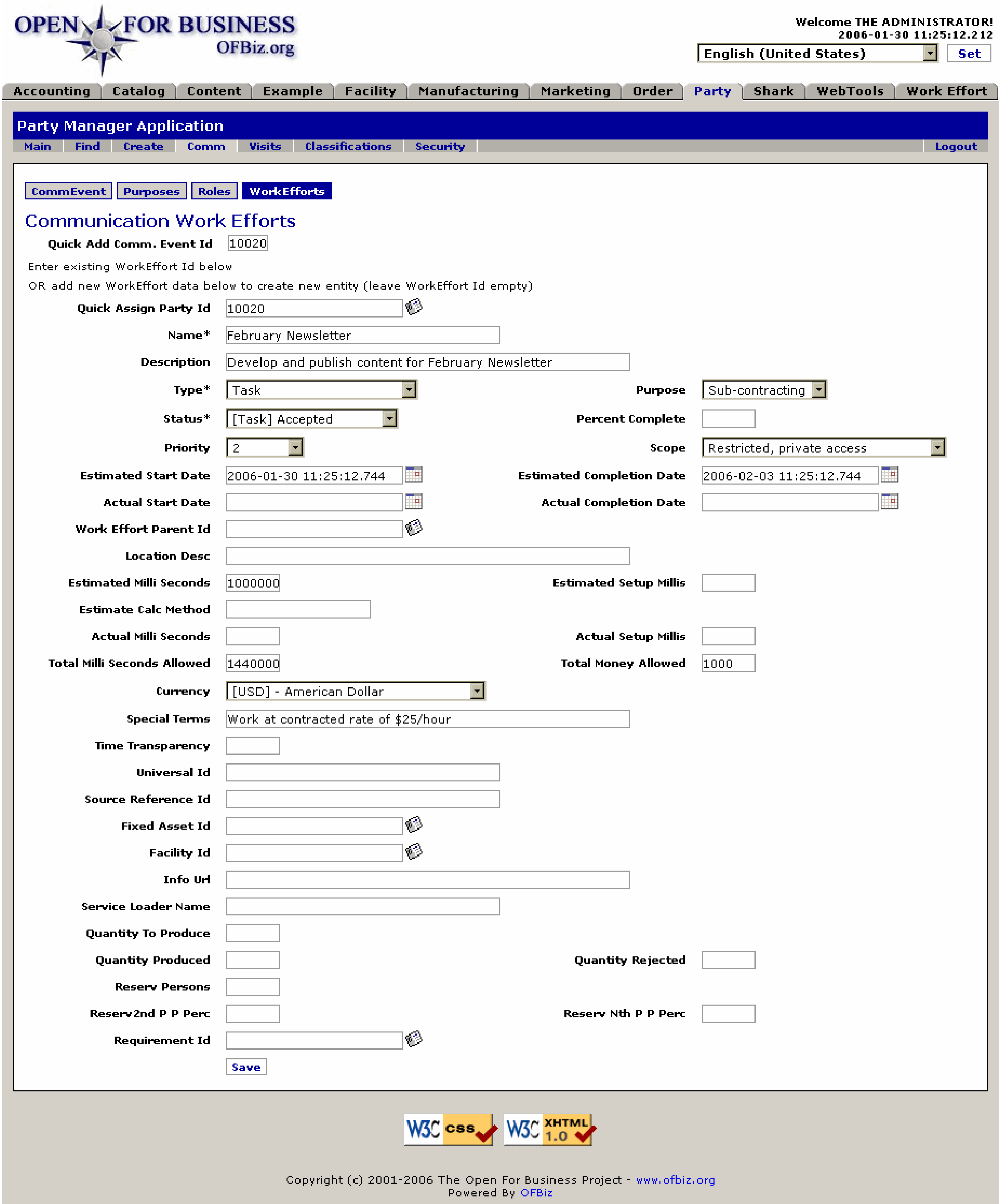
Select the Role from the drop-down list. Remember that this is to define the Role played within the Communication Event, not just the regular job title of the Party. Also remember that if a Party does not have the Role already assigned as a potential role under Party > Find > Role(s), it cannot be applied here. If an error message occurs, click on Role(s) and assign the role, then return here.

## .6.5.5 WorkEfforts

### .6.5.5.1 Discussion

When there are Communication Events related to WorkEfforts, they will be shown here. New WorkEfforts can be quickly created and related to the Comm Event from this screen. See the major Work Effort application for details about this screen.

### .6.5.5.2 AddCommEventWorkEffort



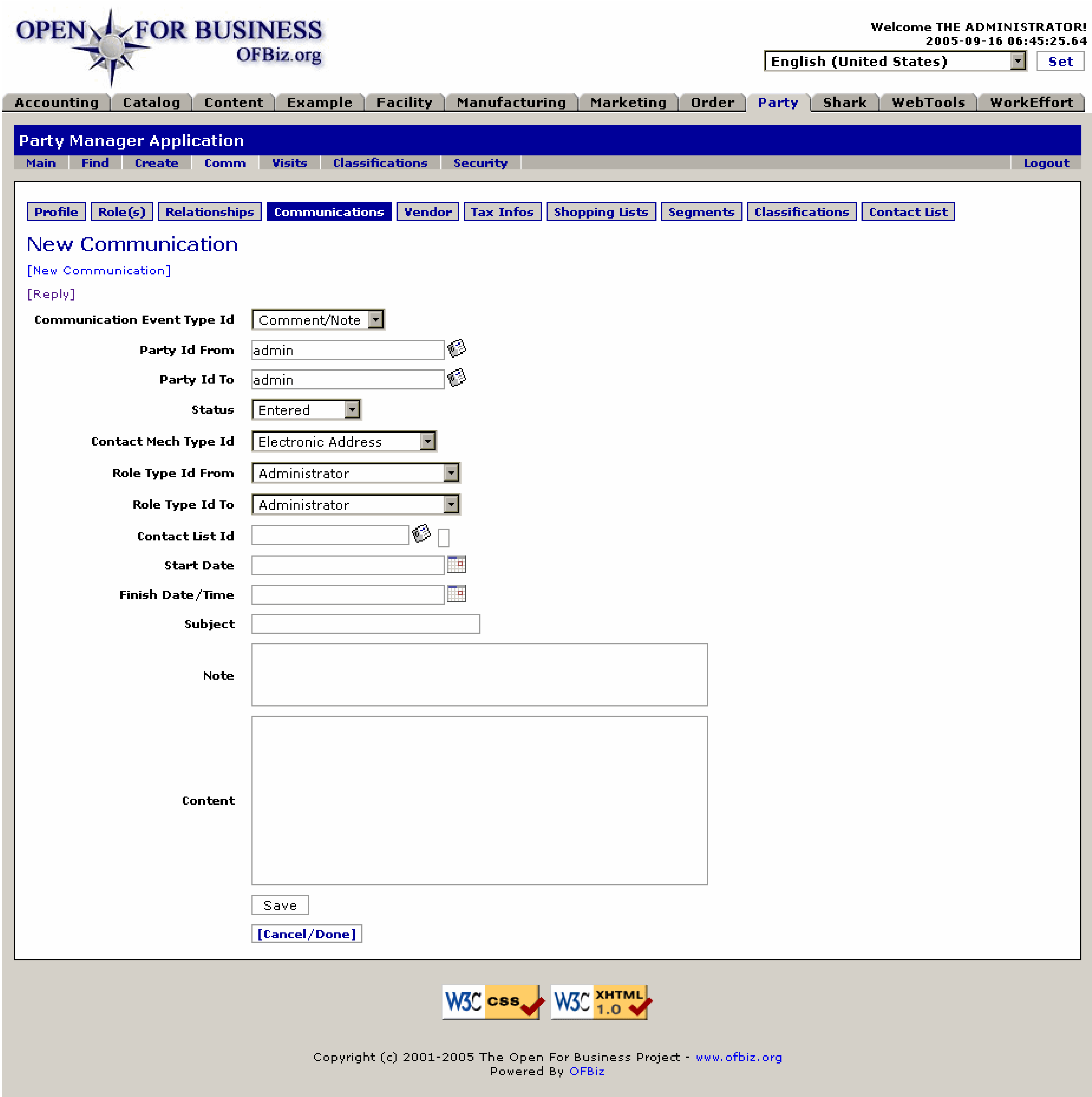

New WorkEffort based upon a Communication Event is established from this screen.

### .6.5.5.3 link buttons

[Save] [CommEvent] [Purposes] [Roles] [WorkEfforts]

## .6.6 Create Reply/New Communication

### .6.6.1 EditCommunicationEvent-reply




When you choose to [Reply] to a Communication item, this blank screen (linked to the Event) is presented.

### .6.6.2 link buttons

[New Communication] [Reply] [Save] [Cancel / Done] [Profile] [Role(s)] [Relationships] [Communications] [Vendor] [Tax Infos] [Shopping Lists] [Segments] [Classifications] [Contact List]

### .6.6.3 Discussion

The Edit/View form is essentially the same as the Reply and the New Communication screen: the default selections are there, no content is given, nothing indicates whether this is a Reply or a New Communication Event.

All of the same items were discussed above when we Viewed the Communication except there is no CommunicationEventID number. That is associated with a Reply and created internally with a New Communication Event.

You will need, therefore, to identify the Party to whom you are replying, choose the appropriate Contact Mechanism, etc. What you see in some of the fields above are default values, not populated data. Complete each of the relevant parts.

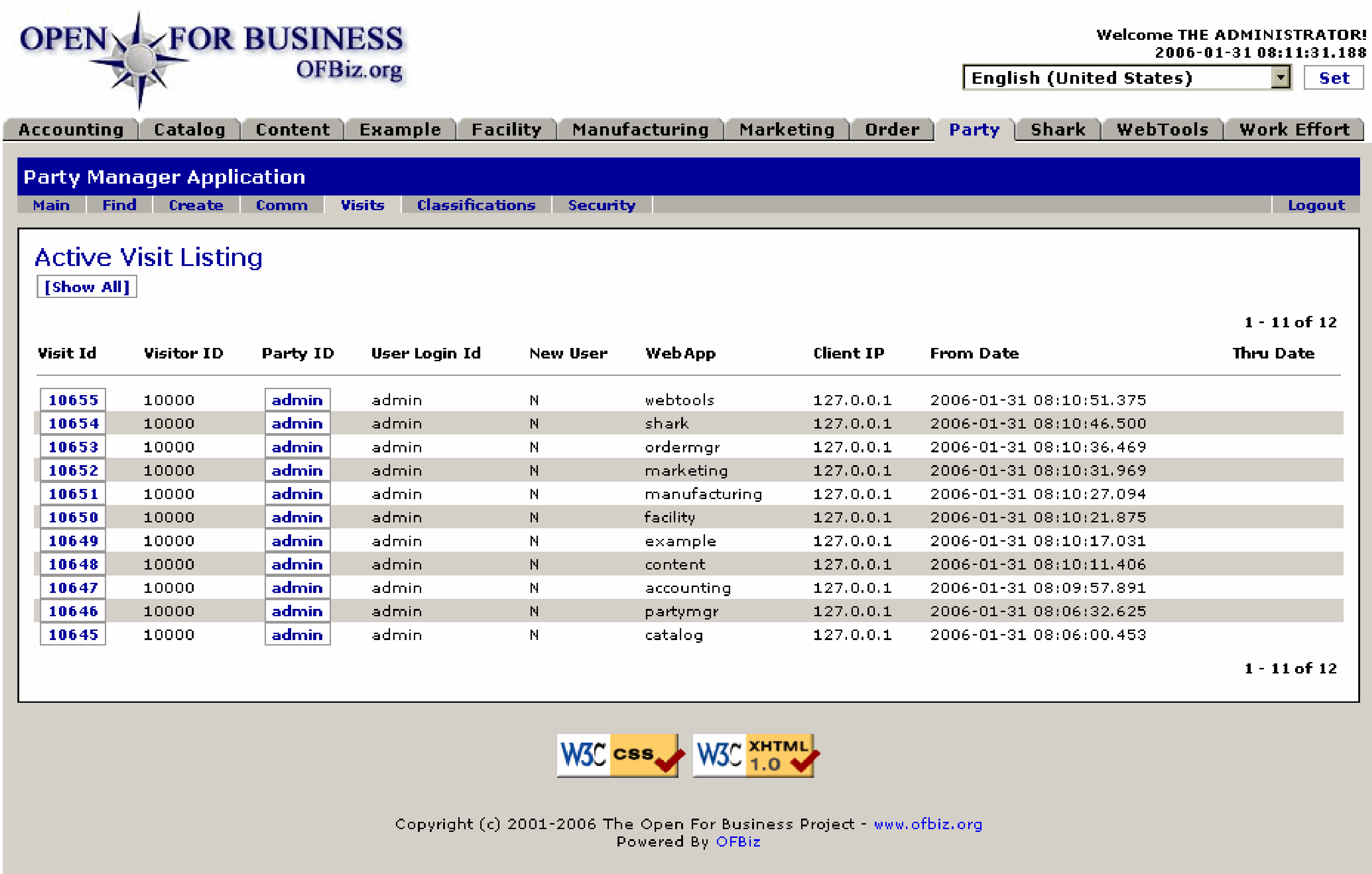
Internally, however, [Reply] and [New Communication] are different. Reply is linked to the original Communications Event ID for tracking purposes. The Reply will be part of the electronic record. A New Communication is linked between whomever you assign for the Party ID From and To codes.

## .7 Visits

### .7.1 Active Visit Listing

Click on the column labels to sort the column. For example, click on Party ID and all the contents will be sorted by the number then the letter of the ID. This will group all visits of a particular ID or client server, etc.

## .7.1.1 showvisits




Initially shows all of the current day's visits by the Party currently logged in. Click [Show All] to view all activity.

## .7.1.2 link buttons

[Show All/Show Active] [Next] [Previous]

## .7.1.3 Visit ID

Click on the Visit ID number to be taken to the Visit Detail Screen. See details below.

## .7.1.4 Visitor ID

When a non-recognized Party logs in, before they are assigned a login ID, they are given a Visitor ID. The New User column should also indicate Y.

### .7.1.5 Party ID

The Party which logged in for this Visit. Click on this ID to see the viewprofile screen for this Party.

### .7.1.6 User Login ID

The identity under which they logged in. For example, a Party might be a customer as well as an employee and have separate login identities for each. This column indicates the Login ID.

### .7.1.7 New User (Y or N)

If this is a first-time visit, the Party would be a New User.

### .7.1.8 Web App

Which Application as the Party using: Accounting? Catalog? Order Manager? This column indicates which was visited.

### .7.1.9 Client IP

Where the visit originated from, the Internet Provider of the Client.

### .7.1.10 From Date (includes time)

When the visitor entered the Application is given here.

### .7.1.11 Thru Date (includes time)

There is no departure time from the Application if the visitor merely went through and then on to another app. The only time Thru Date (and time) are recorded is if there has been activity within that application.

## .7.2 Visit Detail screen

### .7.2.1 visitdetail

OPEN FOR BUSINESS
OFBiz.org

Welcome THE ADMINISTRATOR!
2006-01-31 08:22:31.235
English (United States) | Set

Accounting | Catalog | Content | Example | Facility | Manufacturing | Marketing | Order | Party | Shark | WebTools | Work Effort

Party Manager Application

Main | Find | Create | Comm | Visits | Classifications | Security | Logout

## Visit Detail

| | |
|---|---|
| VisitID / SessionID : | 10643 / AE052BD1E21E9DCC14AFF39D1596B6F5.jvm1 |
| Visitor ID : | 10000 |
| PartyID / UserLoginID : | admin / admin |
| User Created : | N |
| WebApp : | partymgr |
| Server : | / |
| Client : | 127.0.0.1 / 127.0.0.1 |
| Client User : | |
| Initial Locale : | en_US |
| Initial Request : | https://localhost:8443/partymgr/control/updateCommunicationEvent |
| Initial Referer : | https://localhost:8443/partymgr/control/EditCommunicationEvent?communicationEventId=10020 |
| Initial User Agent : | Mozilla/5.0 (Windows; U; Windows NT 5.1; en-US; rv:1.7.11) Gecko/20050728 |
| Cookie : | |
| From Date / Thru Date : | 2006-01-30 09:23:26.165 / 2006-01-30 11:40:39.915 |

## Hit Tracker

1 - 20 of 85 | [Next]

| Content ID | Type | Size | Start Time | Time | URI |
|---|---|---|---|---|---|
| partymgr.EditCommunicationEvent | REQUEST | ? | 2006-01-30 11:40:39.915 | 79 | https://localhost:8443/partymgr/control/EditCo... |
| partymgr.FindCommunicationEvents | REQUEST | ? | 2006-01-30 11:40:37.494 | 250 | https://localhost:8443/partymgr/control/FindCo... |
| partymgr.EditCommunicationEvent | REQUEST | ? | 2006-01-30 11:40:23.384 | 375 | https://localhost:8443/partymgr/control/EditCo... |
| partymgr.UpdateCommRoles | REQUEST | ? | 2006-01-30 11:40:09.228 | 359 | https://localhost:8443/partymgr/control/Update... |
| partymgr.UpdateCommPurposes | REQUEST | ? | 2006-01-30 11:39:50.681 | 281 | https://localhost:8443/partymgr/control/Update... |
| partymgr.EditCommunicationEvent | REQUEST | ? | 2006-01-30 11:39:33.087 | 47 | https://localhost:8443/partymgr/control/EditCo... |
| partymgr.ListPartyCommEvents | REQUEST | ? | 2006-01-30 11:39:29.056 | 250 | https://localhost:8443/partymgr/control/ListPa... |
| partymgr.viewprofile | REQUEST | ? | 2006-01-30 11:39:21.009 | 1,188 | https://localhost:8443/partymgr/control/viewpr... |
| partymgr.findparty | REQUEST | ? | 2006-01-30 11:39:18.837 | 250 | https://localhost:8443/partymgr/control/findpa... |
| partymgr.findparty | REQUEST | ? | 2006-01-30 11:39:06.197 | 203 | https://localhost:8443/partymgr/control/findpa... |
| partymgr.EditCommunicationEvent | REQUEST | ? | 2006-01-30 11:37:47.712 | 78 | https://localhost:8443/partymgr/control/EditCo... |
| partymgr.ListLookupCommEvents | REQUEST | ? | 2006-01-30 11:37:44.337 | 125 | https://localhost:8443/partymgr/control/ListLo... |
| partymgr.FindCommunicationEvents | REQUEST | ? | 2006-01-30 11:37:38.884 | 266 | https://localhost:8443/partymgr/control/FindCo... |
| partymgr.EditCommunicationEvent | REQUEST | ? | 2006-01-30 11:37:30.478 | 62 | https://localhost:8443/partymgr/control/EditCo... |
| partymgr.FindCommunicationEvents | REQUEST | ? | 2006-01-30 11:37:27.134 | 266 | https://localhost:8443/partymgr/control/FindCo... |
| partymgr.FindCommunicationEvents | REQUEST | ? | 2006-01-30 11:36:54.462 | 63 | https://localhost:8443/partymgr/control/FindCo... |
| partymgr.EditCommunicationEvent | REQUEST | ? | 2006-01-30 11:36:51.806 | 281 | https://localhost:8443/partymgr/control/EditCo... |
| partymgr.ListCommWorkEfforts | REQUEST | ? | 2006-01-30 11:36:44.697 | 62 | https://localhost:8443/partymgr/control/ListCo... |
| partymgr.UpdateCommRoles | REQUEST | ? | 2006-01-30 11:36:41.931 | 391 | https://localhost:8443/partymgr/control/Update... |
| partymgr.UpdateCommPurposes | REQUEST | ? | 2006-01-30 11:36:38.056 | 391 | https://localhost:8443/partymgr/control/Update... |

1 - 20 of 85 | [Next]

## Page Push/Following

Push URL | Submit

Follow Session | Submit

W3C CSS | W3C XHTML 1.0



Details of the visit are seen here. Some content items are linked to additional information.

### .7.2.2 link buttons

[Submit]

### .7.2.3 Visit Detail

#### .7.2.3.1 Visit ID/Session ID

The first number (Visit ID) is what you clicked on in the showvisits screen. The second number is generated by the application.

#### .7.2.3.2 Visitor ID

The number used to identify a non-registered User on their first login.

#### .7.2.3.3 Party ID/User Login ID

Click on either to go to the Party Manager > View Profile screen.

#### .7.2.3.4 User Created (Y/N)

Was a new User ID created during this visit?

#### .7.2.3.5 WebApp

Which application within OFBiz was visited? The initial login will always be either into ecommerce or the Party manager.

#### .7.2.3.6 Server

The first box should identify the Server you are operating your application from. The second box should identify the actual computer you are running in.

#### .7.2.3.7 Client

A click on this URL takes you to http://ws.arin.net/cgi-bin/whois.pl?queryinput= for whatever details they might have about the site.

### .7.2.3.8 Client User

If there is any information provided about the User, it will display here.

### .7.2.3.9 Initial Locale

Gives the language requested by the visitor.

### .7.2.3.10 Initial Request

Internal processing information.

### .7.2.3.11 Initial Referer

Internal processing information.

### .7.2.3.12 Initial User Agent

Type of browser being used by the Visitor.

### .7.2.3.13 Cookie

If there was a cookie implanted, what it was.

### .7.2.3.14 From Date / Thru Date

Login Date (includes time) / Logout Date. If the Visit is still active while viewing this visit, the note indicates that.

Also, if the visitor left the application to move to another, the Thru Date is for when the visitor departed from the App, not necessarily from the session.

## .7.2.4 Hit Tracker

### .7.2.4.1 Content ID

This ID is a combination of the application name and the name of the screen presented.

#### .7.2.4.2 Type

What type of a hit? Generally this will be a Request.

#### .7.2.4.3 Size

If the hit was a transfer input of data files, the size would be given here.

#### .7.2.4.4 Start Time

When was the screen first displayed? Includes date and the time in milliseconds.

#### .7.2.4.5 Time

This is the duration of the visit in seconds.

#### .7.2.4.6 URI

Follow this link back for more details of the visit.

### .7.2.5 Page Push / Following

#### .7.2.5.1 Push URL

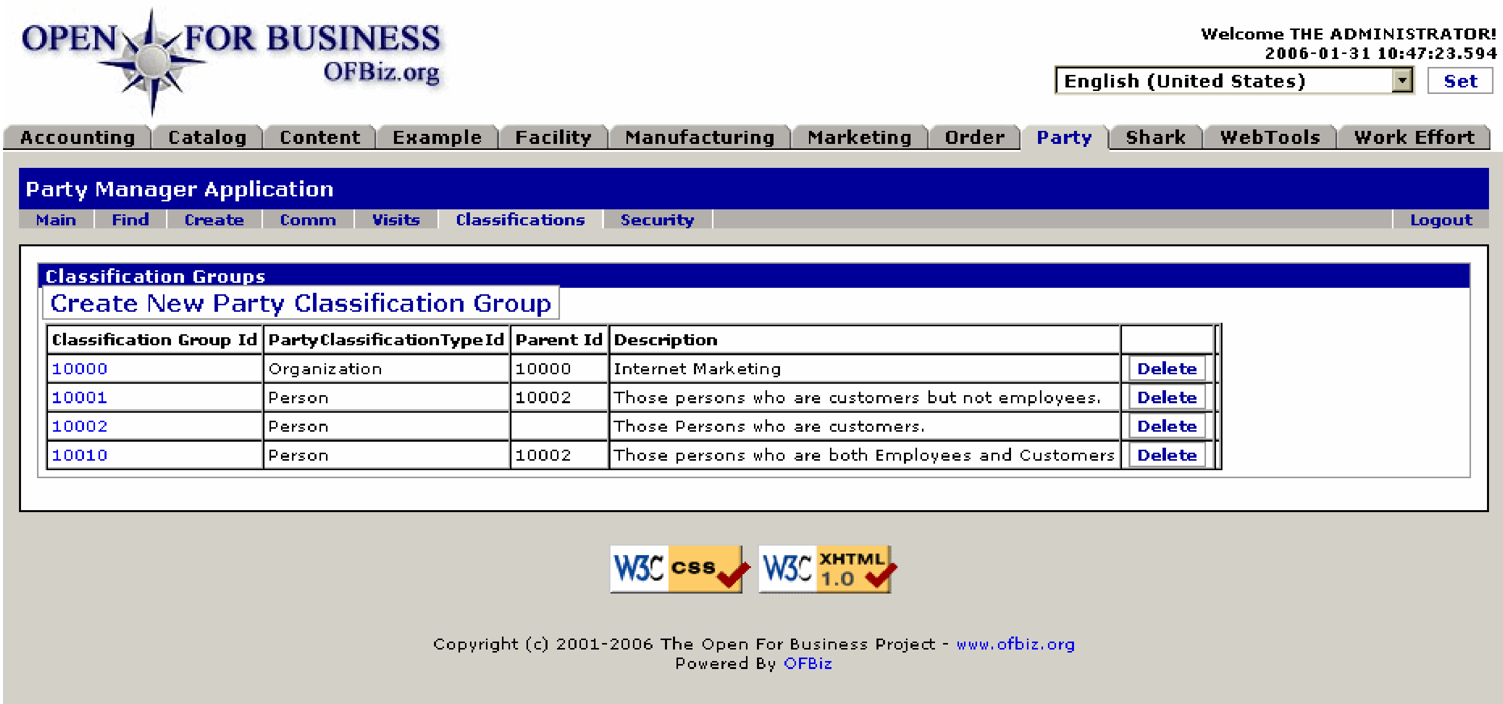
TBD. Documentation to follow.

#### .7.2.5.2 Follow Session

TBD. Documentation to follow.

## .8 Classifications

### .8.1 showclassgroups




Currently existing Classification Groups. Click on the GroupID to edit, or [Create New Party Classification Group] for a new one.

### .8.2 link buttons

[Delete] [Create New Party Classification Group]

### .8.3 Classification Group ID

Click on the ID to edit the Classification Group.

### .8.4 Party Classification Type ID

These could be one of the following:

- Minority
- Income
- Industry
- Organization
- Person

- Size

## .8.5 Parent ID

If this is a Child of another ID, the Parent is given here.

## .8.6 Description

What distinguishes this Classification from another.

## .8.7 Tool to create Classification Group

### .8.7.1 EditPartyClassificationGroup-new


A new Classification Group is created at this screen.

### .8.7.2 link buttons

[Save]

### .8.7.3 PartyClassificationTypeId (drop-down box)

Select from the drop-down ID box. Selections could be:

- Minority
- Income
- Industry
- Organization
- Person
- Size

### .8.7.4 Parent ID (popup search tool)

If there is a parent, enter its ID here. Use the popup search tool to find existing Party Classifications.

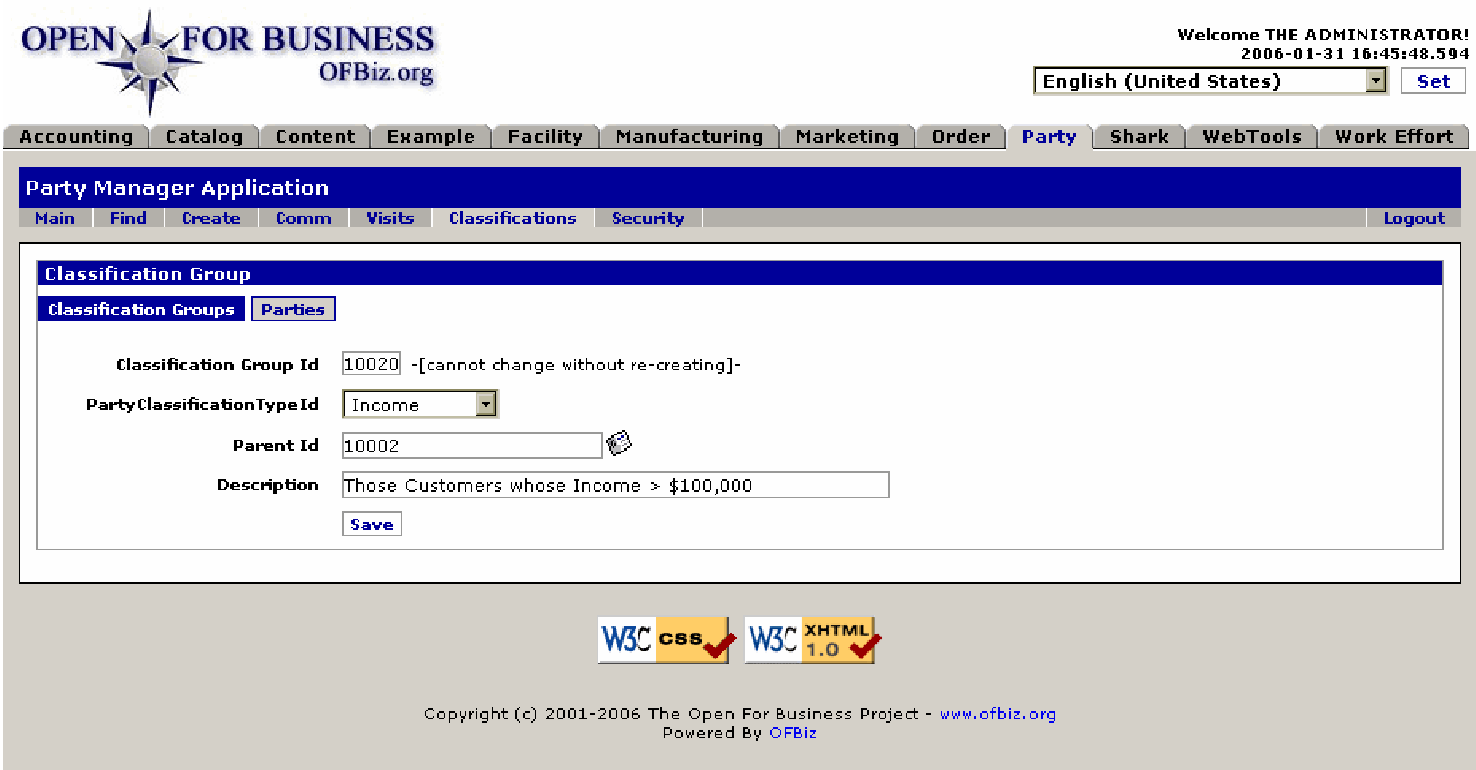
### .8.7.5 Description

Describe the Group's characteristics such that they are differentiated from their Parent and from other Groups.

# .8.8 Edit Existing Classification Group

## .8.8.1 Classification Groups

### .8.8.1.1 EditPartyClassification Group




Edit an existing Classification Group at this screen; click on [Parties] to associate a Party with this Group.

### .8.8.1.2 link buttons

[Save] [Classification Groups] [Parties]

### .8.8.1.3 Classification Group ID

This is the identity of what you are now editing; obviously it cannot be changed.

### .8.8.1.4 Party Classification Type ID (drop-down box)

Although you can program in other Types, these are the default types that come with Open For Business:

- —
- Income
- Industry
- Minority
- Organization
- Person
- Size

### .8.8.1.5 Parent ID (popup search tool)

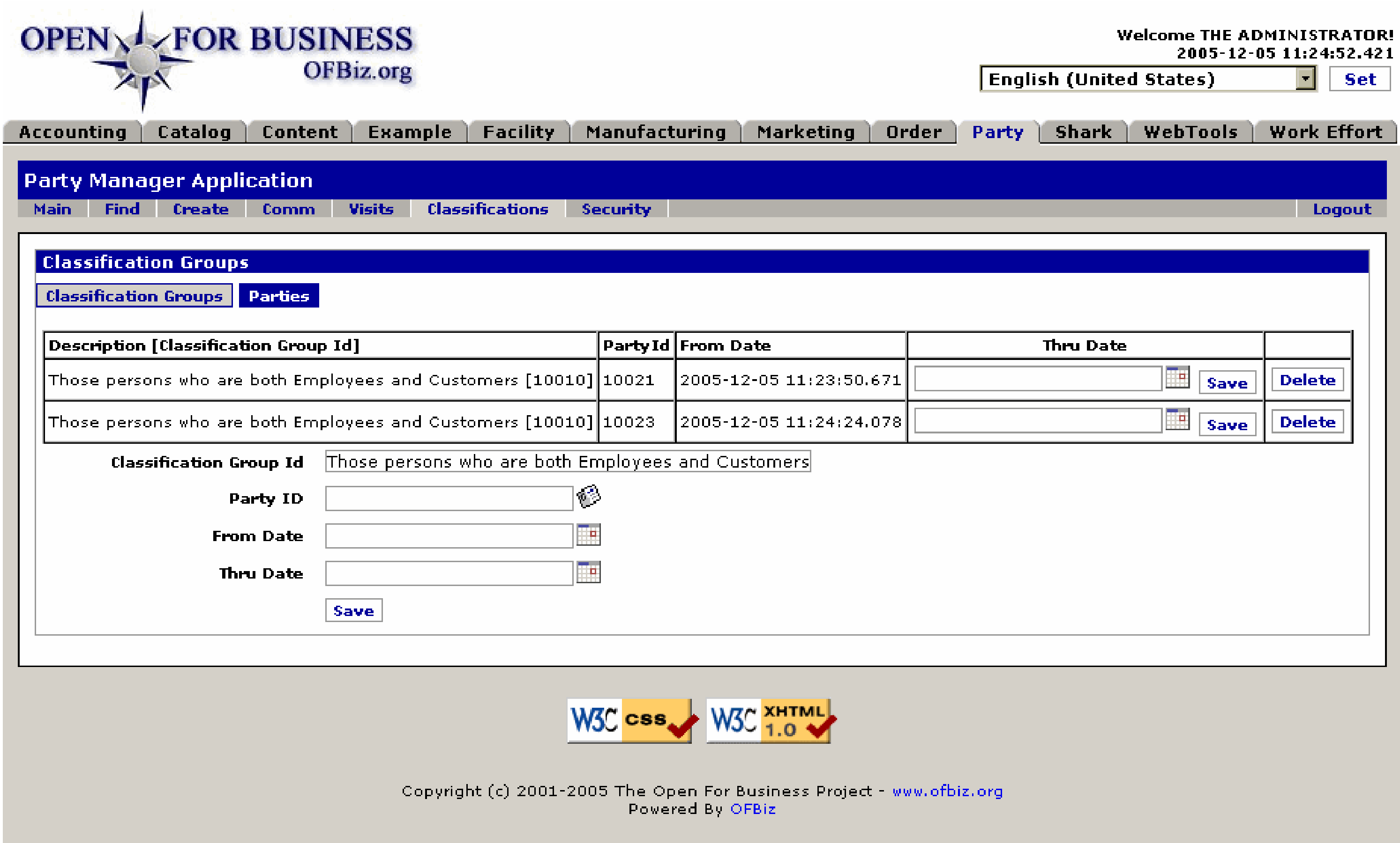
Unless you are creating a Parent Group, use the popup search tool to assign this Group to its Parent.

### .8.8.1.6 Description

This is actually a long-name description, so it needs to be succinct yet differentiate this Group from all others. At the same time, it should specify the larger Group of which this is a part so the relationships are obvious.

## .8.8.2 Parties

### .8.8.2.1 EditPartyClassificationGroupParties




Here you associate a Party with an existing Classification Group. Use the table to identify existing members.

### .8.8.2.2 link buttons

[Save] [Delete] [Classification Groups] [Parties]

### .8.8.2.3 Table of existing assignments

#### .8.8.2.3.1 Description (Classification Group ID)

The descriptive ID for the group, with its ID number in parentheses.

### .8.8.2.3.2 Party ID

The Party ID of the Party assigned to this Group.

### .8.8.2.3.3 From Date

When the assignment was made.

### .8.8.2.3.4 Thru Date (popup calendar)

Unless blank, when the assignment will expire. You may edit this date using the popup calendar.

## .8.8.2.4 Tool to assign Parties to Group

### .8.8.2.4.1 Classification Group ID

The currently selected Group to which you are adding a Party. This cannot be changed here. If you wish to edit another Group, return to the Classifications screen and select a different one.

### .8.8.2.4.2 Party ID (popup search tool)

Either enter the Party ID or select it with the popup search tool. First, check the table above to avoid an attempted duplication of assignment.

### .8.8.2.4.3 From Date (popup calendar)

Will automatically enter Now upon assignment unless you select a different date/time using the popup calendar.

### .8.8.2.4.4 Thru Date

Generally you would leave this blank unless you expressly wish an assignment to expire at a future known date.

# .9 Security

## .9.1 Security Groups List

### .9.1.1 FindSecurityGroup


| Security Group ID | Description |
|---|---|
| [ORDERPROC] | Admin group for restricted order processing. |
| [WEB_BLOG_TECH] | All technical permissions to manage / maintain website content. |
| [CATALOGADMIN] | Catalog Admin group, has all catalog permissions. |
| [VIEWADMIN] | Demo Admin group, has all view permissions. |
| [FLEXADMIN] | Flexible Admin group, has all granular permissions. |
| [FULLADMIN] | Full Admin group, has all general permissions. |
| [BIZADMIN] | Full Business Applications permission group, has all business app admin permissions, not technical permissions. |
| [CATALOGADMIN_LTD] | Limited Catalog Admin group, has limited catalog permissions. |
| [ORDERSUPPLIER_LTD] | Limited Order Admin group for Supplier Agents. |
| [ORDERADMIN_LTD] | Limited Order Admin group, has all limited order permissions. |
| [ORDERADMIN] | Order Admin group, has all order permissions. |
| [ORDERENTRY] | Order Entry Admin group; permissions for creating orders. |
| [ORDERENTRY_ALL] | Order entry permission for all stores. No special role is needed. |
| [ORDERPURCH] | Order entry with purchasing permissions |
| [POSCLERK] | POS Clerk |
| [PARTYADMIN] | Party Admin group, has all party permissions. |

This table names and describes all of the existing Security Groups. Click on a Security Group ID to edit it.

### .9.1.2 link buttons

[New Security Group]

### .9.1.3 Security Group ID

Click on this link to Edit the Security Group.

## .9.1.4 Description

Description given when the Security Group was created. Can be changed at the EditSecurityGroup screen.

# .9.2 Edit Security Group screen

## .9.2.1 Edit Security Group

### .9.2.1.1 EditSecurityGroup


When you have clicked on a Security Group, this is the first screen following. Only the Description can be changed here.

### .9.2.1.2 link buttons

[New Security Group] [Update] [Security Groups] [Permissions] [User Logins]

### .9.2.1.3 Security Group ID

Although it appears to be capable of changing, the ID cannot be edited. If the 'Name' must be changed, create a new Security Group ID and delete the incorrect one.

### .9.2.1.4 Description

Brief phrase that defines this Security Group from all others.

## .9.2.2 Permissions

### .9.2.2.1 EditSecurityGroupPermissions

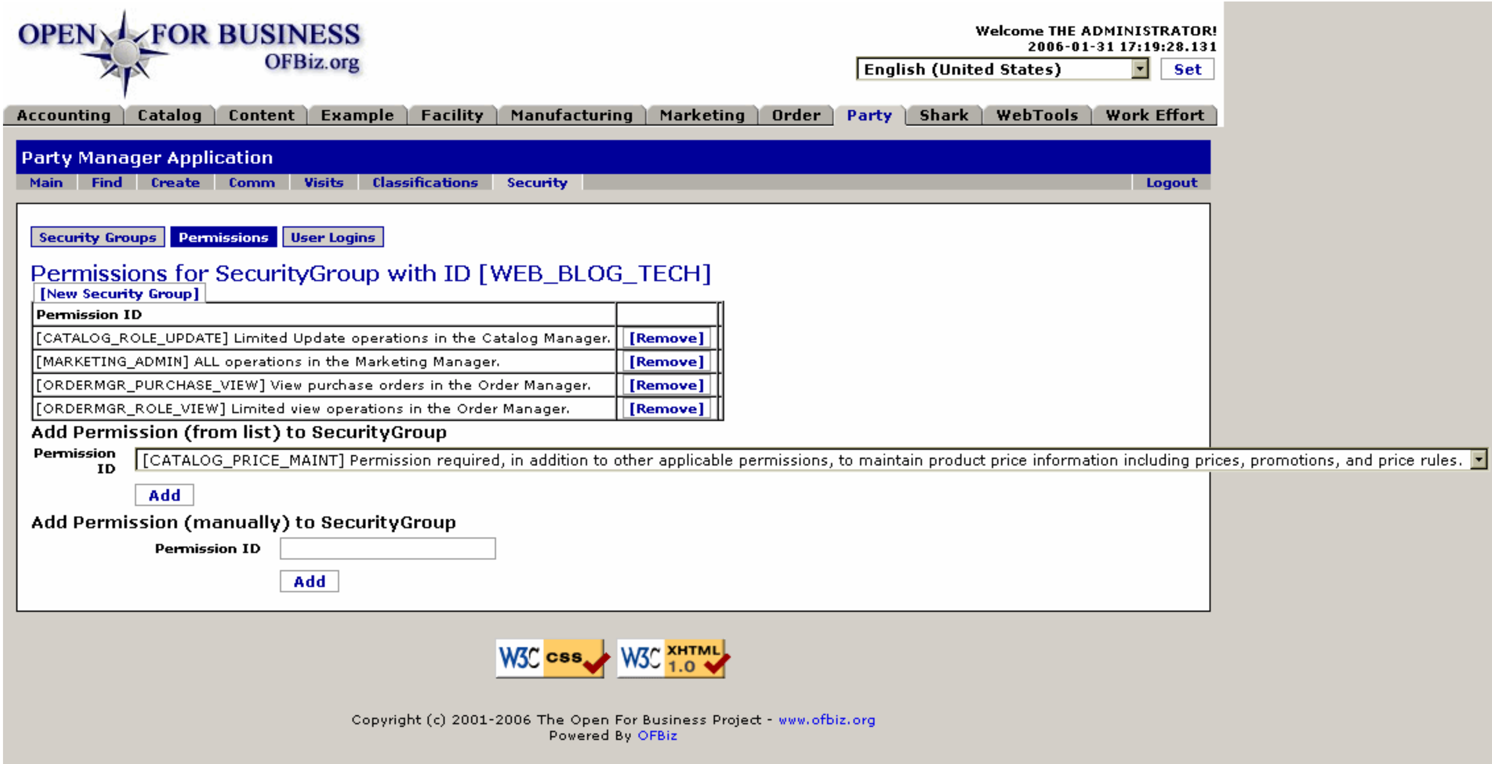



Table of current Permissions for the selected Security Group (from which any Permission can be deleted) and a tool to specify additional Permissions.

### .9.2.2.2 link buttons

[New Security Group] [Remove] [Add] [Security Groups] [Permissions] [User Logins]

### .9.2.2.3 Table of assigned Permissions

#### .9.2.2.3.1 (Permission ID) with Description

Click the [Remove] button to delete from permissions.

## .9.2.2.4 Add Permission (drop-down box)

Add Permission ID from the drop-down list to the Security Group.

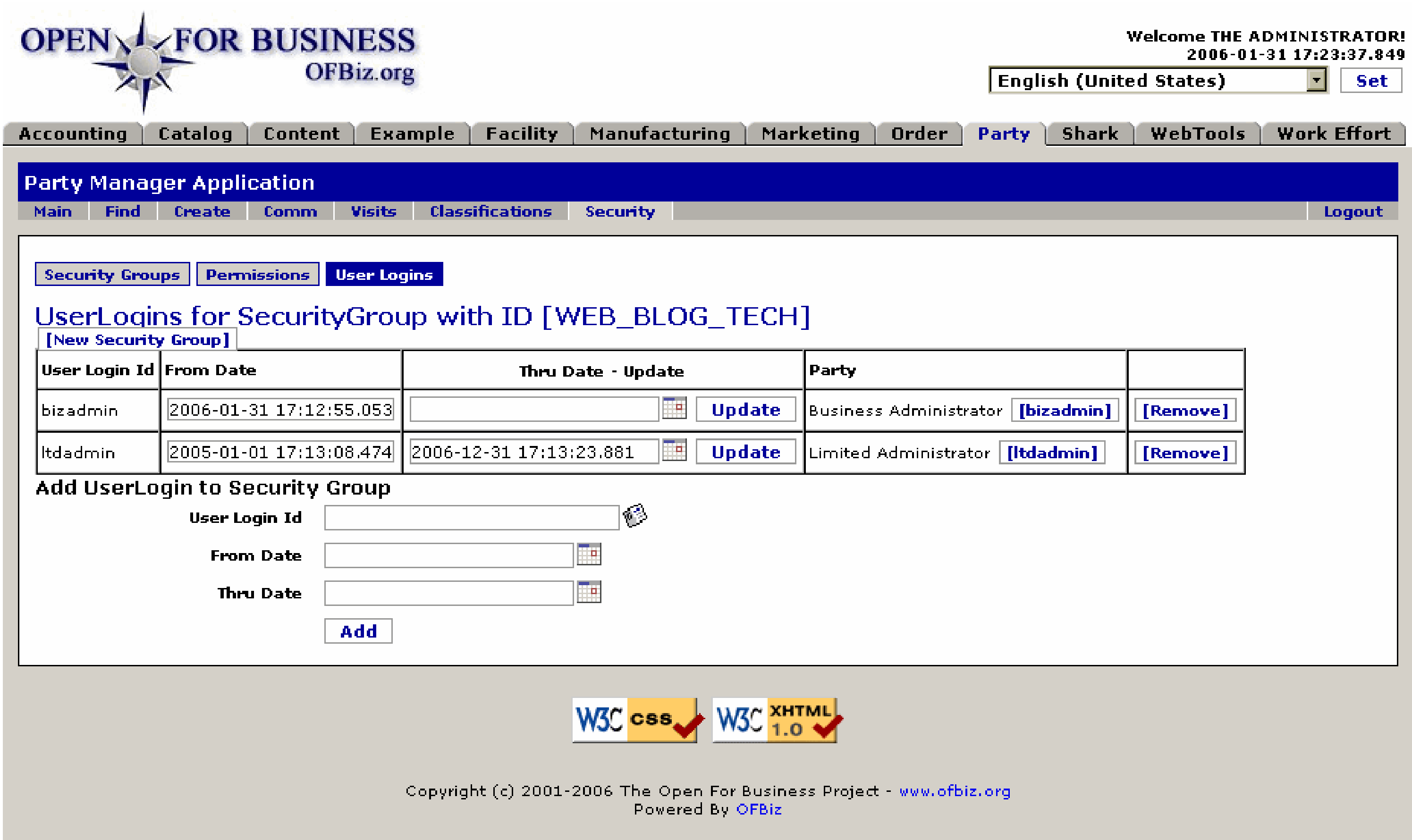
## .9.2.2.5 Add Permission (manually) to Security Group

Enter the Permission ID then click on [Add].

## .9.2.3 User Logins

User Logins for Security Group with ID 'Nnnnnn'.

## .9.2.3.1 EditSecurityGroupUserLogins




Control access to Security Groups by associating their Logins with the Security Group.

### .9.2.3.2 link buttons

[New Security Group] [Update] [Remove] [Add] [Security Groups] [Permissions] [User Logins]

### .9.2.3.3 Table of UserLogins

#### .9.2.3.3.1 User Login ID

The ID under which the Party would login to have these permissions.

#### .9.2.3.3.2 From Date

Date the Permission was assigned or, as shown in the example, the date when the Permission become effective. Note that the text is highlighted in red to show that permission was not current at the time the screen was captured for this illustration.

#### .9.2.3.3.3 Thru Date (popup calendar)

Date the assignment of permission will expire. Leave blank only if you want the permission to be indefinite.

There are security reasons for requiring periodic expiration of access or authorization privileges. For example, an employee might leave or be fired; if you forgot to remove permissions at the time of their departure, an expiration will ensure eventual closing of this potential security breach.

#### .9.2.3.3.4 Party

The Party ID is a link to the Party > Profile for that ID. The description precedes the Party ID in this cell.

### .9.2.3.4 Add UserLogin to this Security Group

#### .9.2.3.4.1 User Login ID

The login under which the Party will have these permissions.

#### .9.2.3.4.2 From Date (popup calendar)

Date the Permission was assigned or, as shown in the example, the date when the Permission becomes effective. Note that the text is highlighted in red to show that permission was not current at the time the screen was captured for this illustration.

#### .9.2.3.4.3 Thru Date (popup calendar)

Date the assignment of permission will expire. Leave blank only if you want the permission to be indefinite. This date can be changed in the table above after the assignment has been made.

There are security reasons for requiring periodic expiration of access or authorization privileges. For example, an employee might leave or be fired; if you forgot to remove permissions at the time of their departure, an expiration will ensure eventual closing of this potential security breach.

## .9.3 Create New Security Group

>> Edit Security Group With ID ###

### .9.3.1 EditSecurityGroup-new


A new Security Group is created here with an ID and a description. Permissions are associated elsewhere.

### .9.3.2 link buttons

[New Security Group] [Update]

### .9.3.3 Security Group ID

Create the name (ID) of the new Security Group here.

### .9.3.4 Description

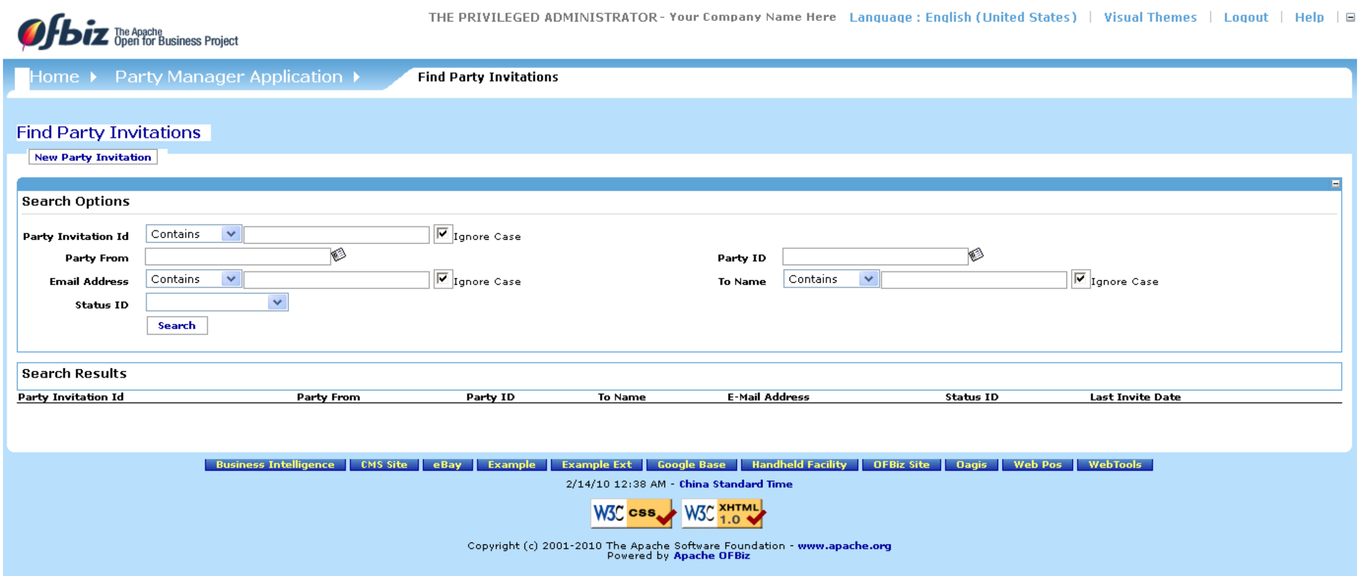
Provide a concise yet unique Description to differentiate this Security Group from all others.

# .10 Address Match Map

Query fields mapKey and mapValue from Entity AddressMatchMap.
Search mapKey in address,then replace the found result with mapValue.


# .11 Invitation

## .11.1 Find Invitations



## .11.2 link buttons

[Search] [New Party Invitation]

## .11.3 Party Invitation Id

If you have the ID, enter it and that will be the only Invitation listed in the table of results.

## .11.4 Party From

Use the popup search tool to identify the Party initiating or originating the Invitation.

## .11.5 Email Address

This is the email address

## .11.6 Status ID

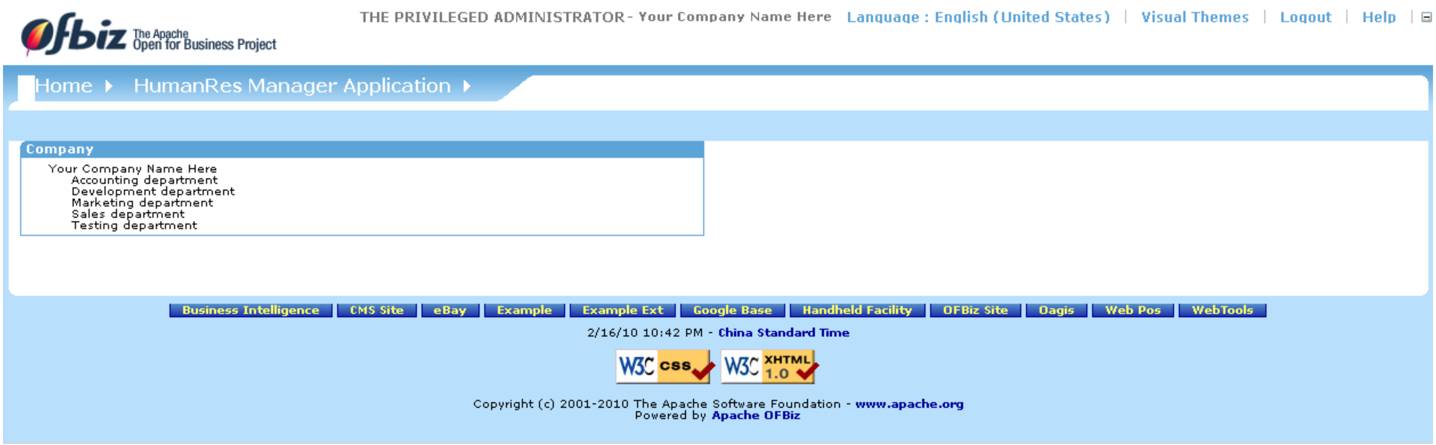
These could be one of the following:

- Invitation Accepted
- Invitation Cancelled
- Invitation Declined
- Invitation Pending
- Invitation Sent

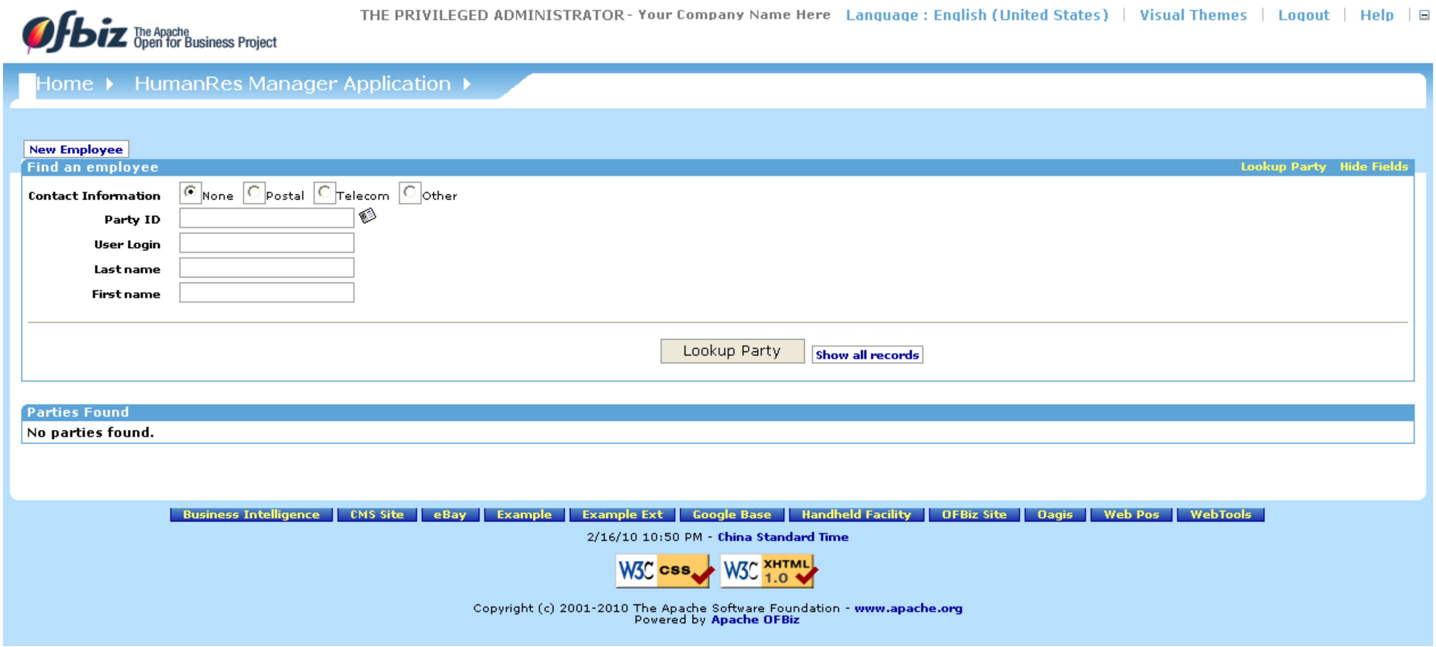
# Chapter 5: Human Resources

## .1 Introduction

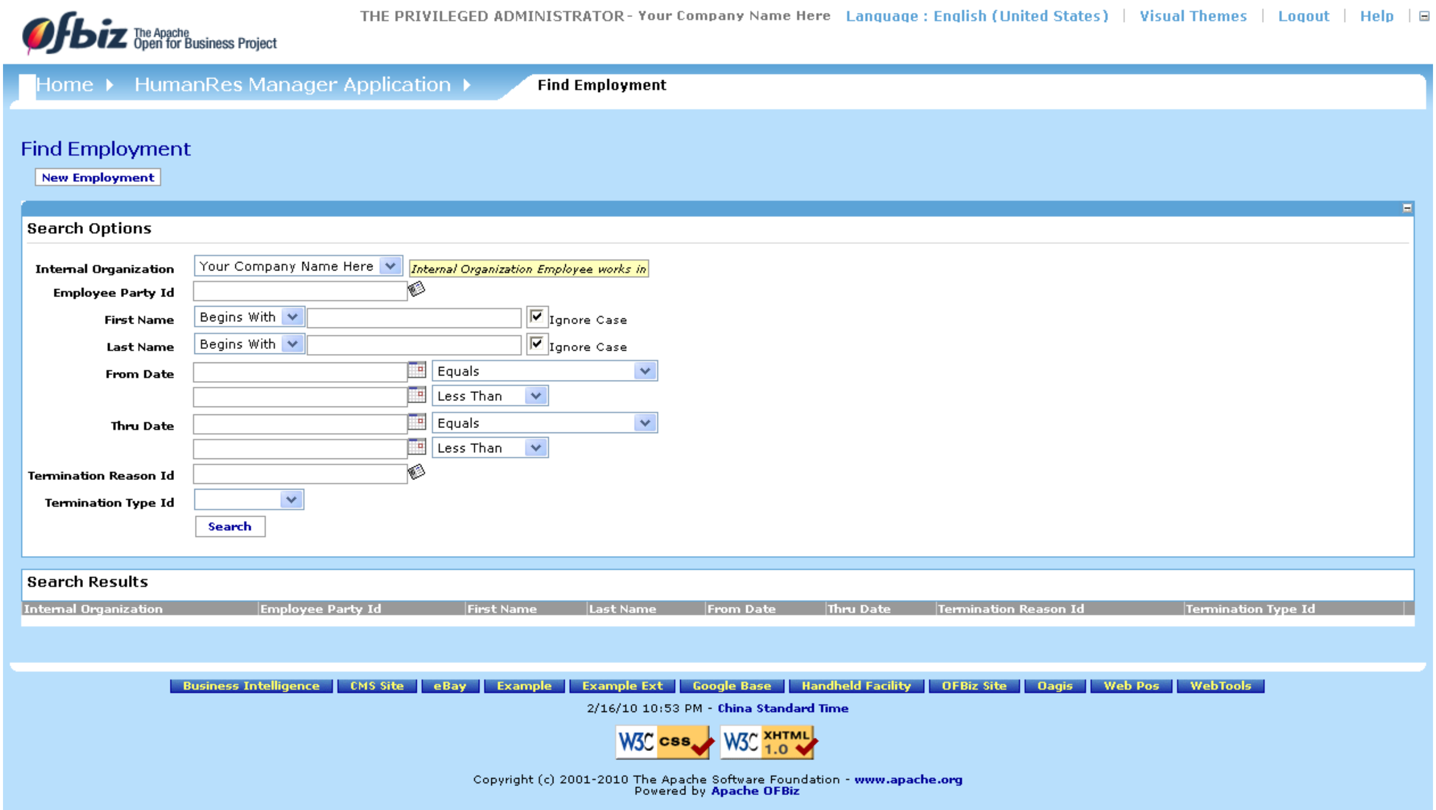
## .2 Main



## .3 Employee




## .4 Employment

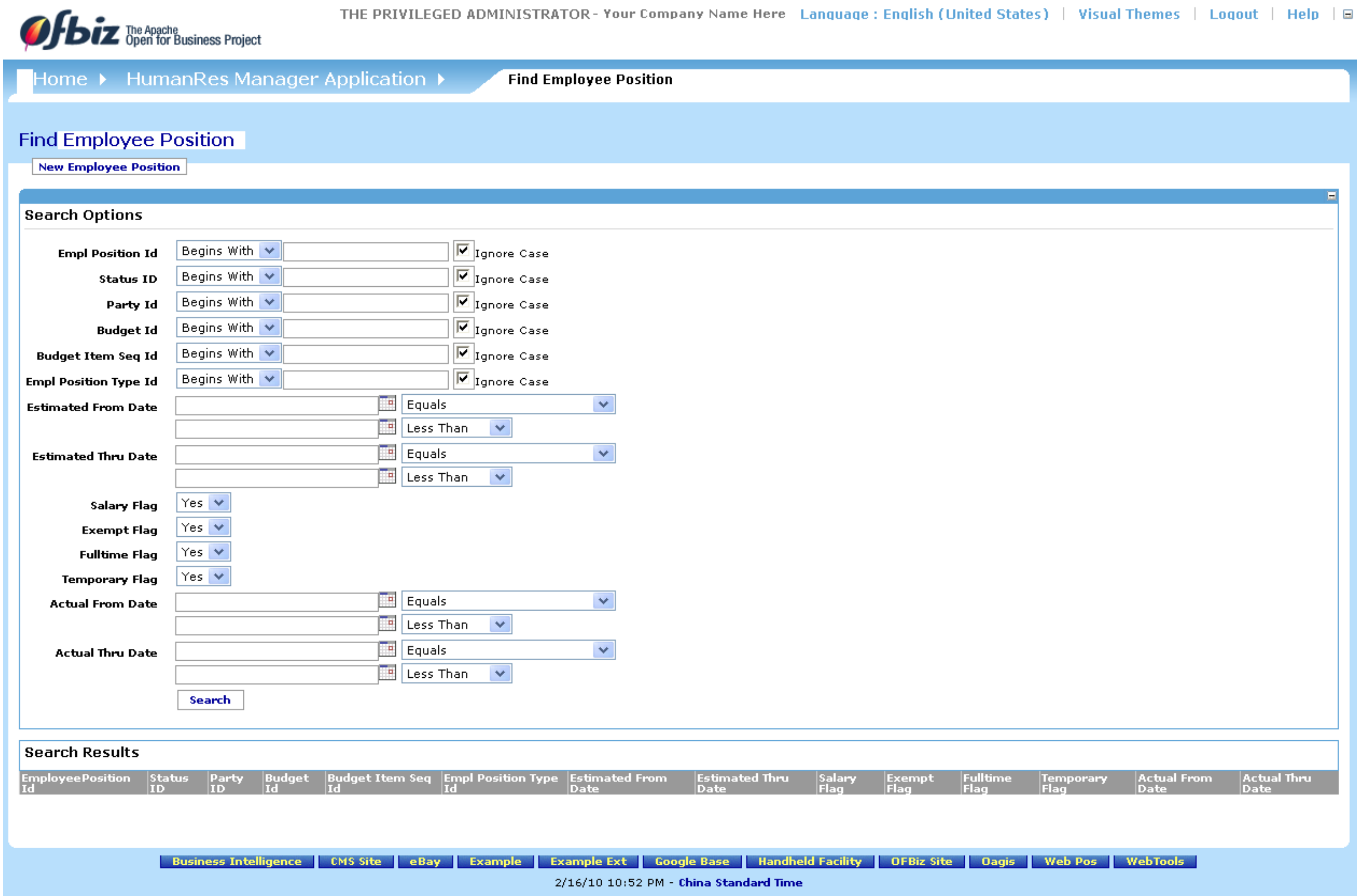


Represents relationship between Party (of subtype Person) in Employee role and Party (of subtype Party Group) in Internal Organization role. Employment history of an employee is recorded by Adding and Updating Employment records.

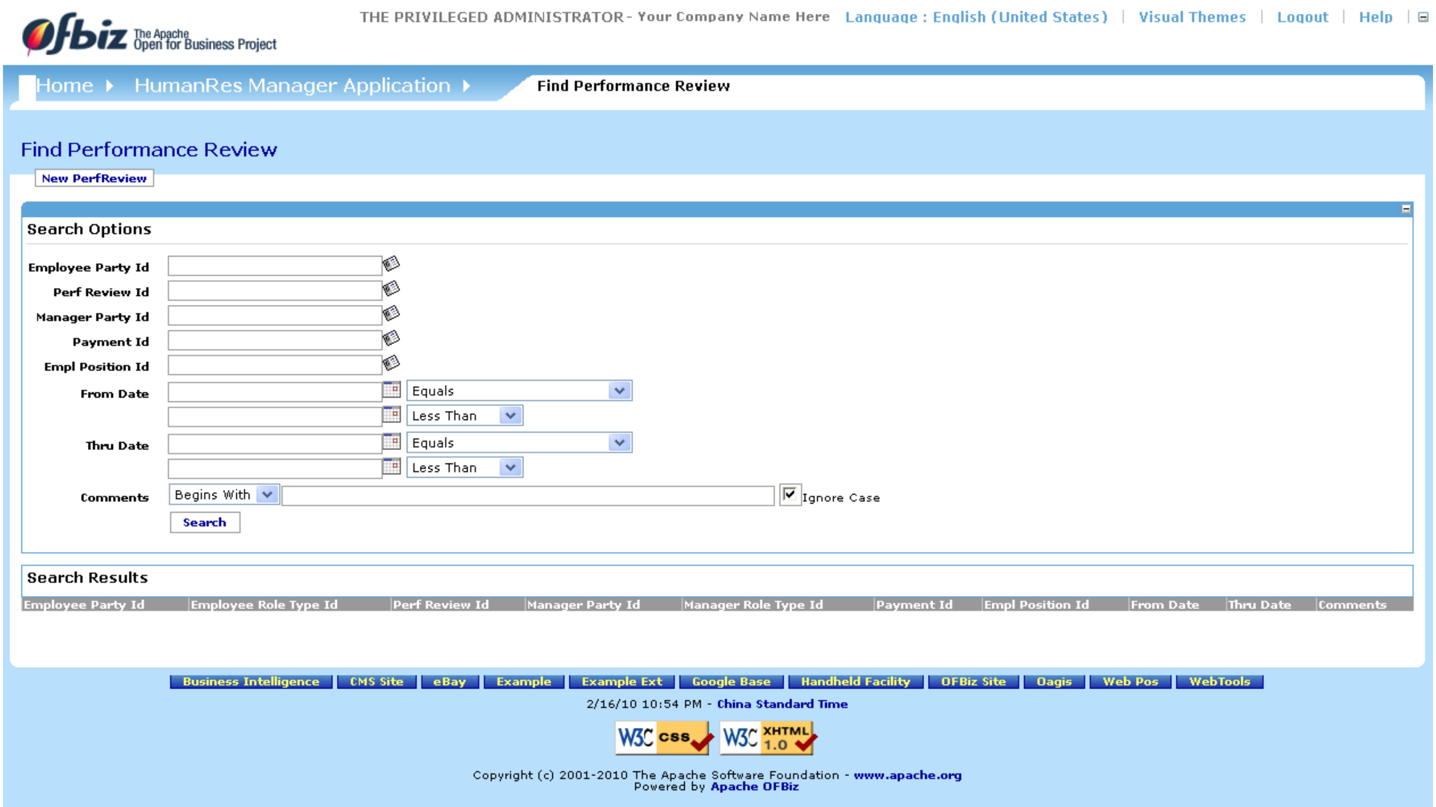
## Add/Update Employment

Add Employment when a person in EMPLOYEE role joins Internal Organization (aka Department). Update Employment to set thru date when EMPLOYEE ends employment with Internal Organization.

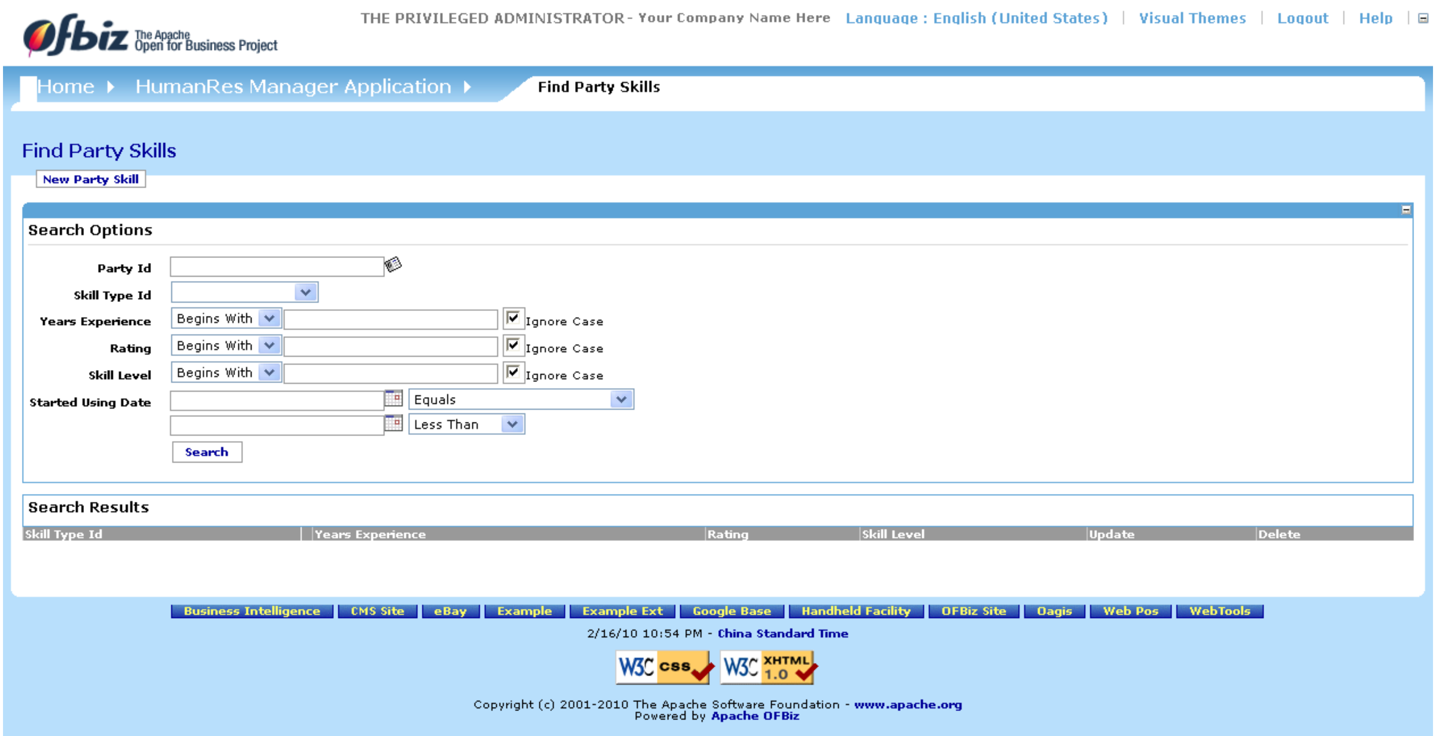
# .5 Employee Position



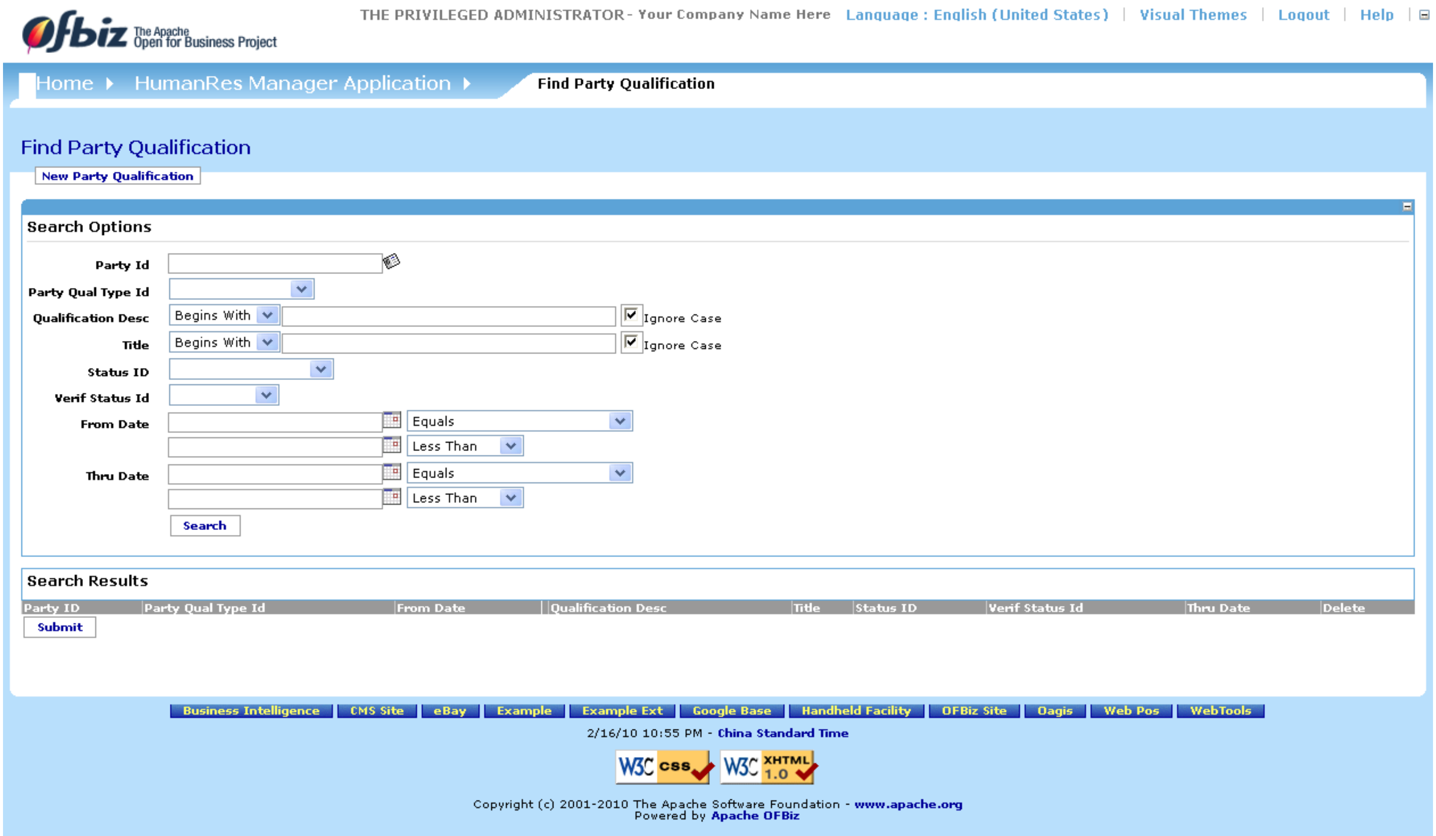

Performance Review


THE PRIVILEGED ADMINISTRATOR - Your Company Name Here
Language : English (United States) | Visual Themes | Logout | Help
Home
HumanRes Manager Application
Find Performance Review
Find Performance Review
New PerfReview
Search Options
Employee Party Id
Perf Review Id
Manager Party Id
Payment Id
Empl Position Id
From Date
Equals
Less Than
Thru Date
Equals
Less Than
Comments
Begins With
Ignore Case
Search
Search Results
Employee Party Id
Employee Role Type Id
Perf Review Id
Manager Party Id
Manager Role Type Id
Payment Id
Empl Position Id
From Date
Thru Date
Comments
Business Intelligence | CMS Site | eBay | Example | Example Ext | Google Base | Handheld Facility | OFBiz Site | Oagis | Web Pos | WebTools
2/16/10 10:54 PM - China Standard Time
Copyright (c) 2001-2010 The Apache Software Foundation - www.apache.org
Powered by Apache OFBiz

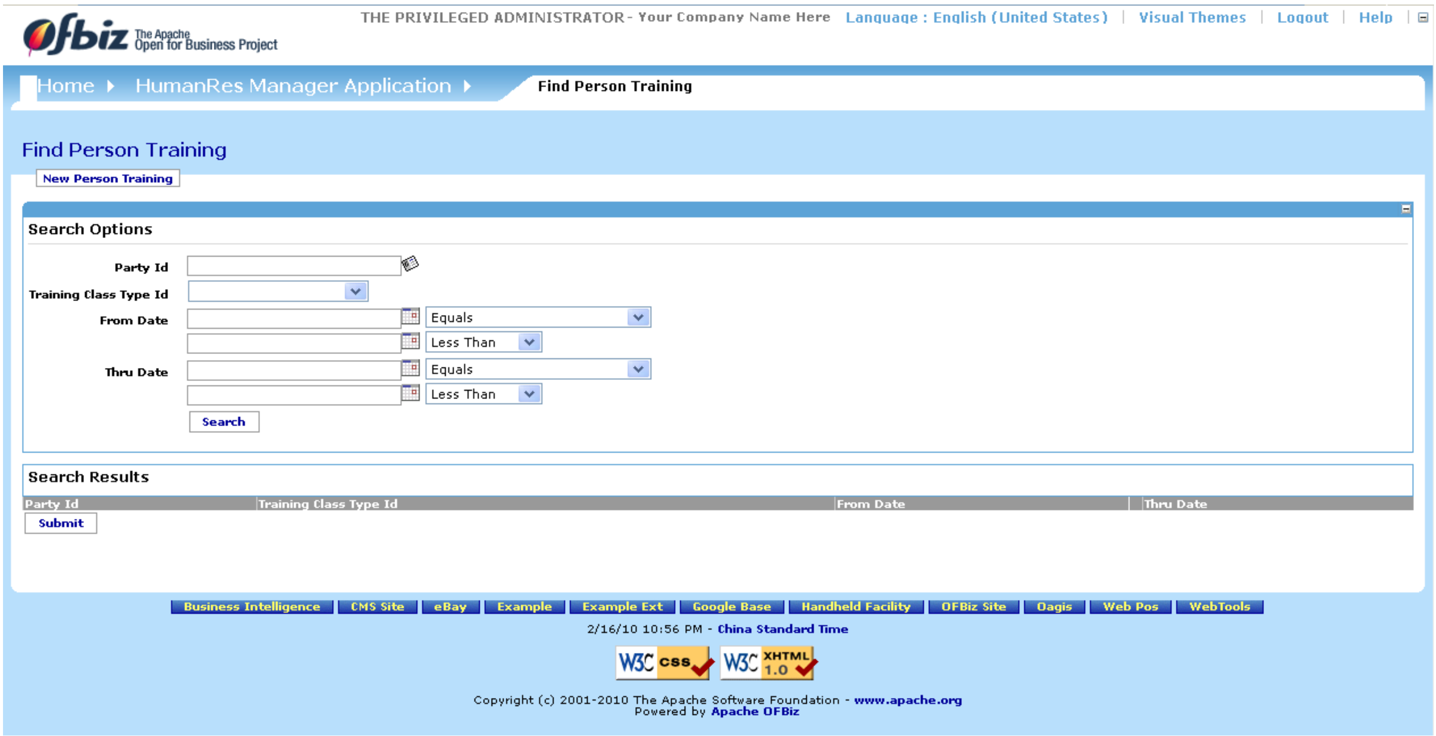
# .6 Skill


THE PRIVILEGED ADMINISTRATOR - Your Company Name Here
Language : English (United States) | Visual Themes | Logout | Help
Home
HumanRes Manager Application
Find Party Skills
Find Party Skills
New Party Skill
Search Options
Party Id
Skill Type Id
Years Experience
Begins With
Ignore Case
Rating
Begins With
Ignore Case
Skill Level
Begins With
Ignore Case
Started Using Date
Equals
Less Than
Search
Search Results
Skill Type Id
Years Experience
Rating
Skill Level
Update
Delete
Business Intelligence | CMS Site | eBay | Example | Example Ext | Google Base | Handheld Facility | OFBiz Site | Oagis | Web Pos | WebTools
2/16/10 10:54 PM - China Standard Time
Copyright (c) 2001-2010 The Apache Software Foundation - www.apache.org
Powered by Apache OFBiz

## .7 Qualification



## .8 Training




Introduction: Trainings in HR module includes Training Calendar where we can create new schedules from trainings available in an organization. Admin can assign trainings & employee can request for scheduled trainings. Employee can also check status of their training requests & assignments.

Need of Trainings in HR:

- Training and development of professionals fills up the skill gaps and further improve the levels of proficiency.
- Training and development manages constantly changing business and industrial scenario and therefore, matches with the requirements or demands of changes on the organizations.
- Creates a learning organization culture.

Organizational development:

- Organization decides to use certain initiatives and wants to train and develop a good number of people in the entire organization or the people in certain chosen departments or projects on those initiatives.
- Prepares the organization to meet the needs of legal/statutory requirements. Features of Trainings:
- New Trainings can be added/modified.
- Trainings can be scheduled in the calendar.

- Employees can apply to supervisor for available scheduled trainings but, cannot request same training event again to same approver
- Admin can assign trainings to Employees.
- Admin can approve/reject the trainings requested to him but, once rejected cannot be approved again.
- Employees can check the status of their training requests and Trainings assigned to them.

Road Ahead: Currently we have implemented Trainings under HR module. We are working on the implementation of Training calendar in profile tab of Employee. We are also planning to introduce trainer's information in training calendar.

In "GlobalHRSetting"

1. Admin can create & manage the trainings provided by the organization.

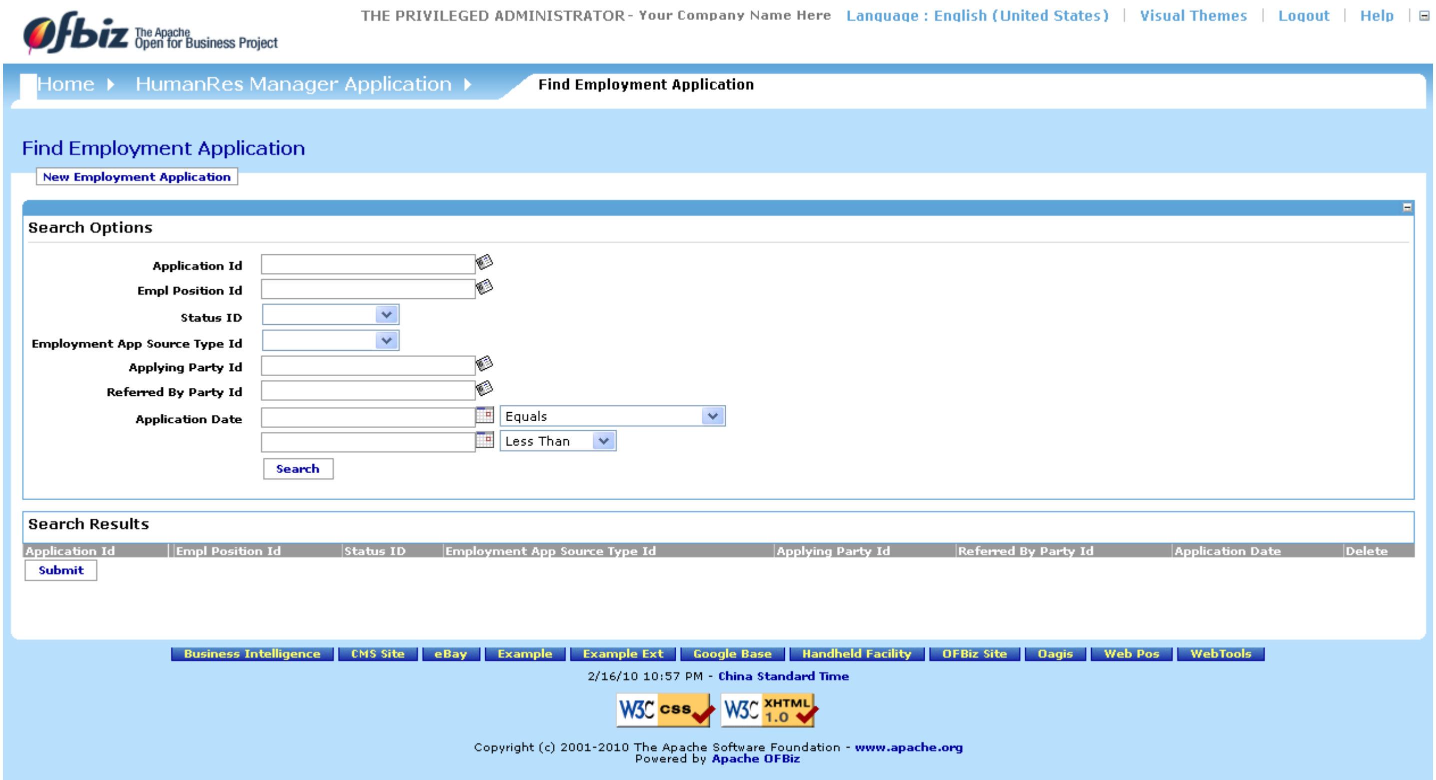
In "Training Calendar"

1. Admin can schedule a training through training calender.
2. Admin can assign training to an employee(right half of calendar screen).
3. Employee with his login can request for Training to admin from the calendar.
4. Employee cannot request same training event again to same approver.

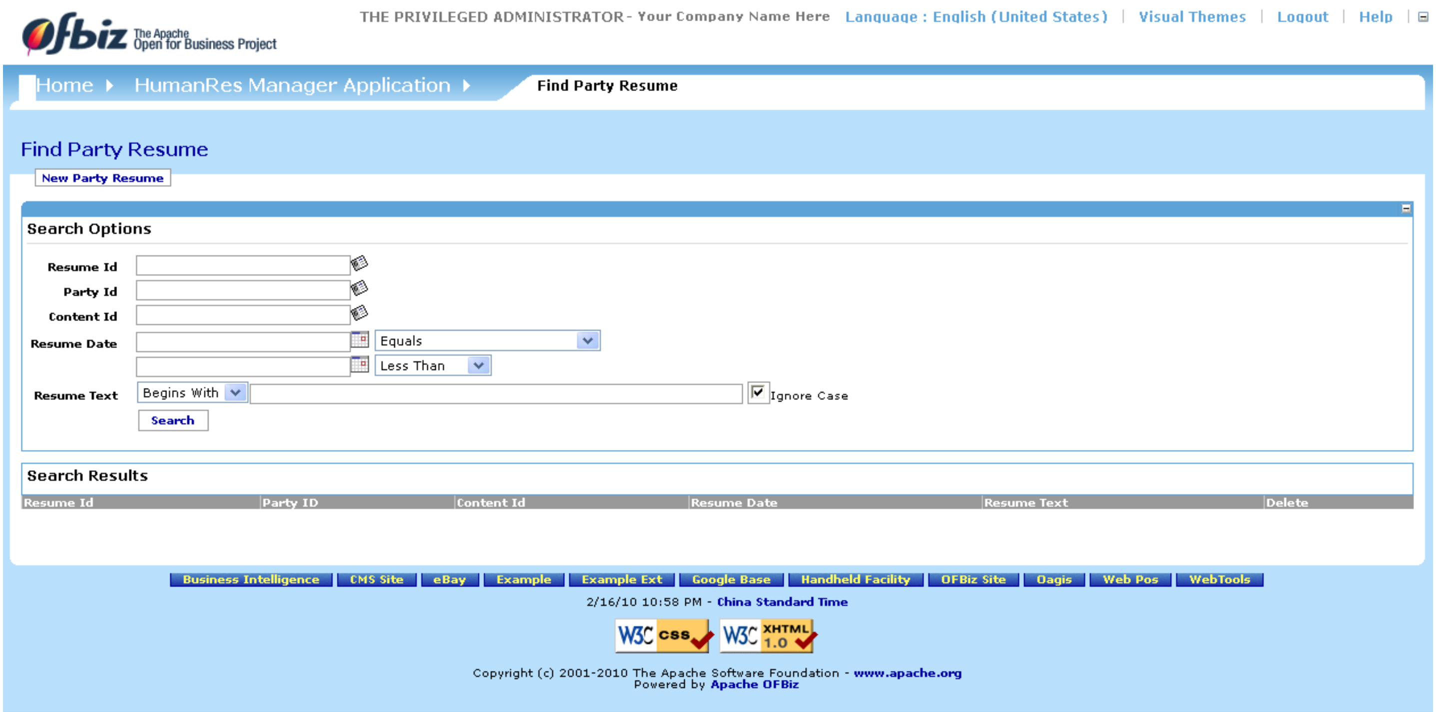
In "Training Approval" tab (in case of Employee login tab name would be "Training Status")

1. Admin can approve/reject the training requested to him
2. Admin can not change the training status once it is rejected.
3. Employee can check status of requested and assigned trainings.

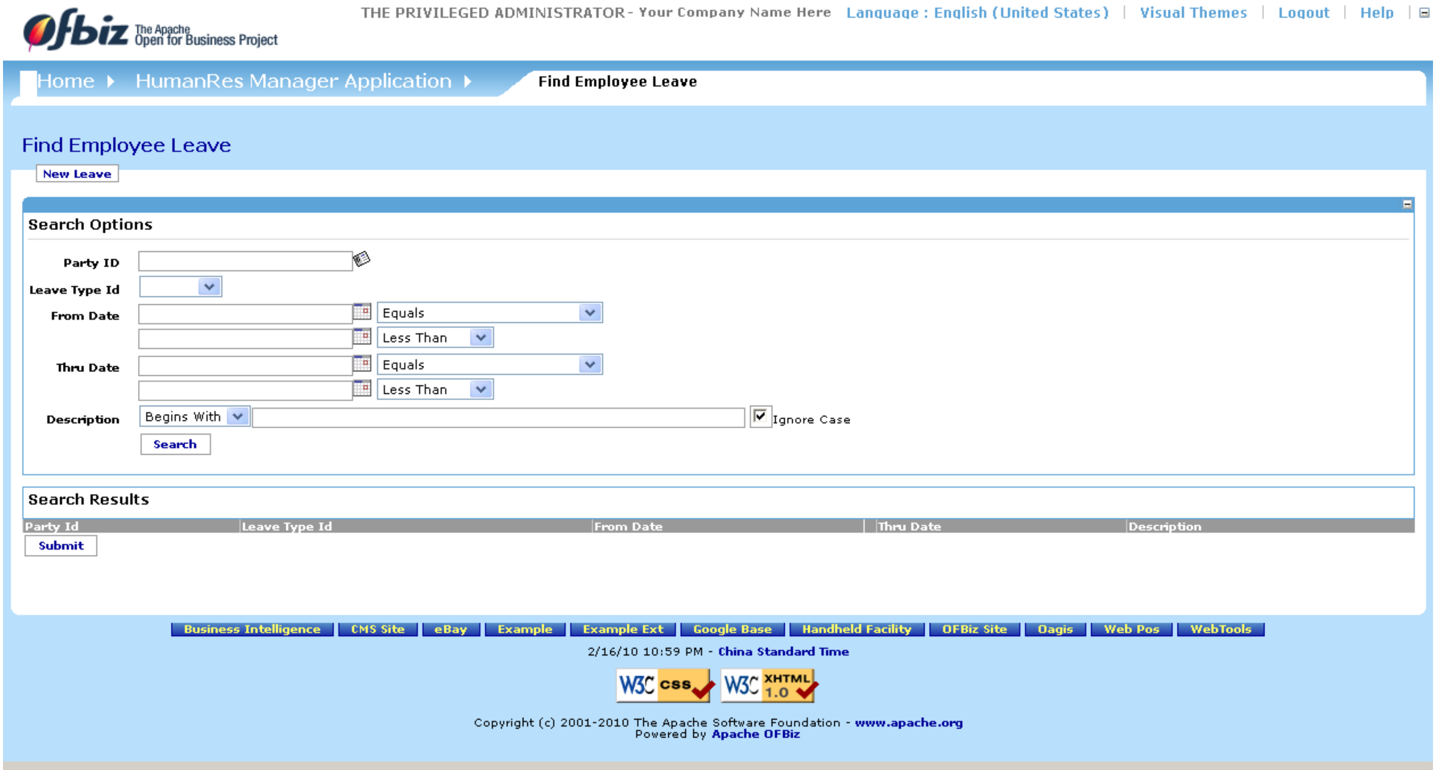
## .9 Employment Application




## .10 Resume

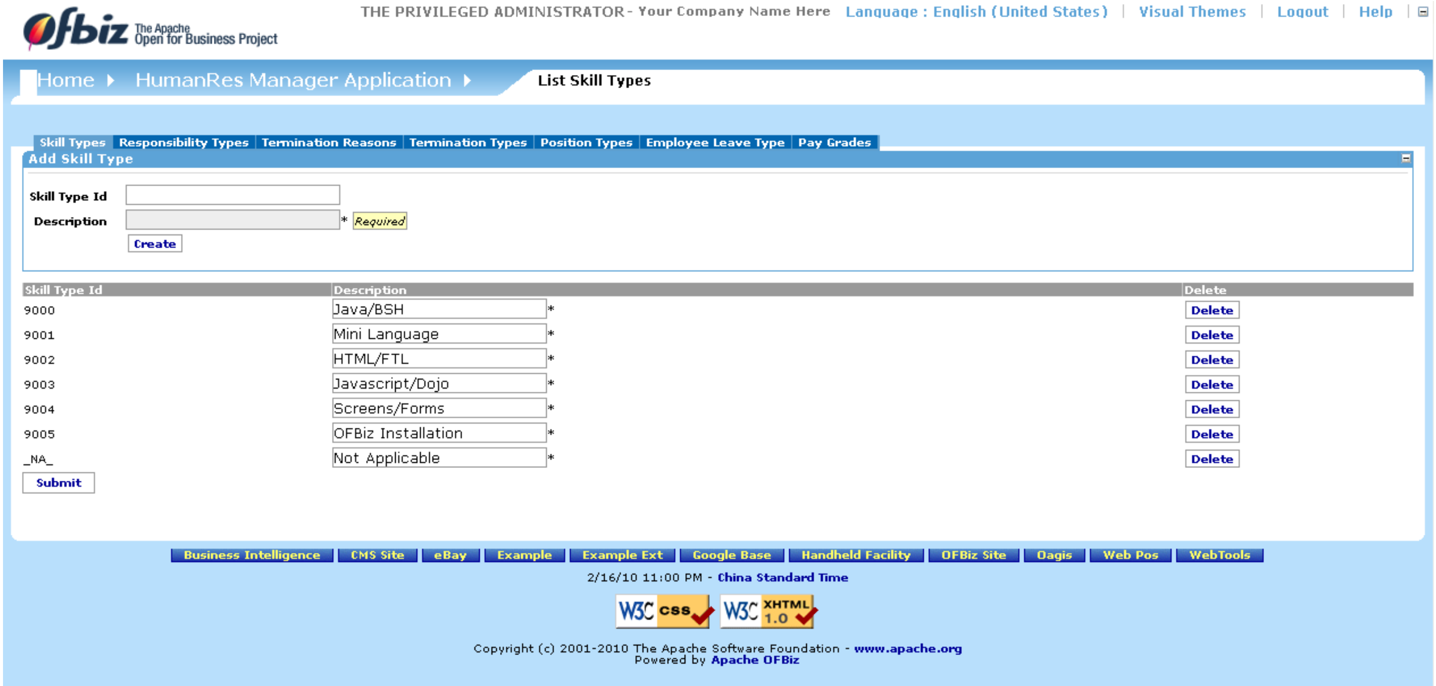


# .11 Leave



ofbiz The Apache Open for Business Project
THE PRIVILEGED ADMINISTRATOR - Your Company Name Here
Language : English (United States) | Visual Themes | Logout | Help
Home
HumanRes Manager Application
Find Employee Leave
Find Employee Leave
New Leave
Search Options
Party ID
Leave Type Id
From Date
Equals
Less Than
Thru Date
Equals
Less Than
Description
Begins With
Ignore Case
Search
Search Results
Party Id
Leave Type Id
From Date
Thru Date
Description
Submit
Business Intelligence
CMS Site
eBay
Example
Example Ext
Google Base
Handheld Facility
OFBiz Site
Oagis
Web Pos
WebTools
2/16/10 10:59 PM - China Standard Time
Copyright (c) 2001-2010 The Apache Software Foundation - www.apache.org
Powered by Apache OFBiz

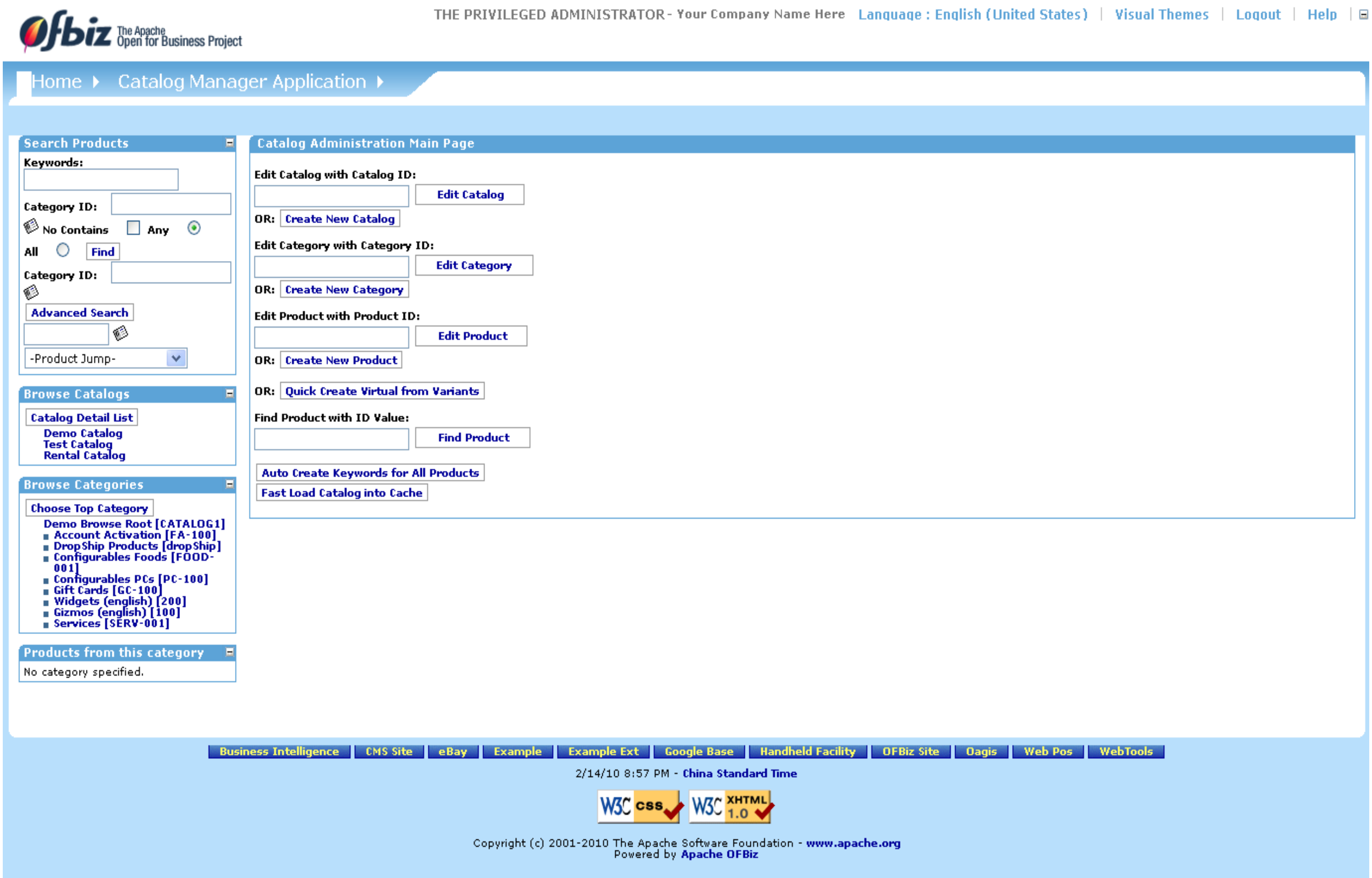
## .12 Global HR Settings



# Chapter 6: Catalog Manager

# .1 Introduction

## .1.1 main




## .1.2 Main screen

The Catalog Manager creates or provides access to a variety of information. Whether Products, Catalogs, or Categories, this screen offers search tools and links to get you to the type of information you need or are working with quickly and accurately.

Down the left hand column are 4 sections:

Search Products, Browse Catalogs, Browse Categories, and Product Categories.

You can click on the colored '_' to close a section; later, click on the colored '[]' to reopen the section.

Each of those sections are discussed below before we begin to explore the Catalog Administration Main Page.

## .1.3 Navigation Panel

The Left-hand Navigation Panel is visible even when working under the other tabs. The content displayed will vary according to what choices you have made. This document is arranged to walk you through the Navigation Panel search tools (Search Products, Browse Catalogs, Browse Categories, and Category Products) and links first. As you come to the desired Edit or Creation window, jump in this document to the associated 'Edit' discussion.

## .1.4 Some symbols used as shortcuts

### .1.4.1 Brackets [ ]

Application links as found on the screens are represented in this document with brackets around them like [this].

When you see a bracketed item, you can know we are referring to a link or key or 'button' which will initiate the indicated action.

### .1.4.2 Greater-than symbols >>

The single (>) or double (>>) greater than symbols can be read as 'takes you to' or 'leads to' or 'results in.' These are sometimes used in this document to indicate that from this screen, if you click on the [Bracketed Link], you will be taken to Next Process. Within the pop-up calendars, however, the (>>) jumps you ahead one year and the (<<) jumps you back a year.

### .1.4.3 The Asterisk *

An asterisk * marks those items which must be completed on a screen before the desired action can occur.

# .2 Search Products

## .2.1 SearchProducts

Tool to search for products by keyword,category,and others.You can search from various perspectives;results are displayed in the main screen to the right.


## .2.2 link buttons

[Find] [Advanced Search]

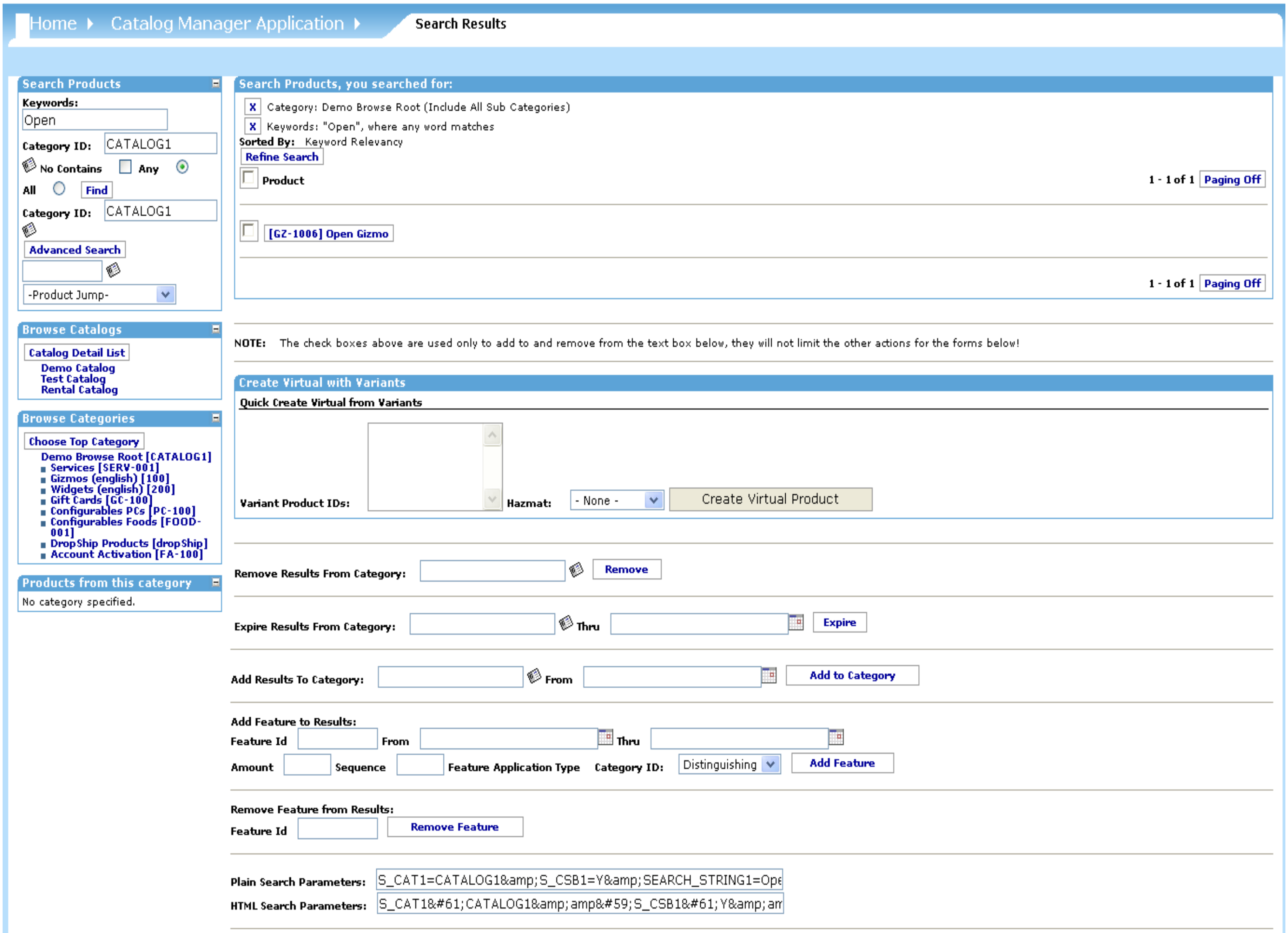
## .2.3 by Keywords

### .2.3.1 Discussion

Enter any or all of the words in a product name, or enter a Category ID.'Any' will present every product or category with any of the specified words.'All' returns only the products with every word in its name.'No Contains' checked means to eliminate returns meeting the criteria from the first Category ID box. For example, in the illustration below, if the Category 'Gizmo' were entered in the first box and 'No Contains' were checked, there would be no results found.Click on [Find] when entries are complete. If your returns are not satisfactory, use the Advanced Search feature.

## .2.3.2 Results of search

### .2.3.2.1 keywordsearch-results




Results of the keyword search for “Open” within Catalog1 are displayed in the window with many tools ready for you to proceed.

### .2.3.2.2 link buttons

[Find] [Advanced Search] [Refine Search] [Create Virtual Product] [Remove] [Expire] [Add to Category] [Add Feature] [Remove Feature]

### .2.3.2.3 List of found products

Each of the returned Items is a link to that item's catalog page. Click on the desired product to go to that page.

### .2.3.2.4 Create Virtual Product

An example of virtual product is 'Shirt' - no one buys a shirt, they buy a white, short-sleeve shirt, with button-down collar and pocket, size Large. Each of the adjectives represents a variant of the virtual product shirt. What this tool does is provide the means to make variants around an existing product which would turn that product into a virtual. In the example found, Open Gizmo is the Virtual and the Variants are expressed in (MIT), (BSD), etc.

### .2.3.2.5 Remove Results from Category

Here you can quickly delete all of the resulting products from every category (specify ~~Any Category~~) or from whichever category you select from the drop-down box.

### .2.3.2.6 Expire Results from Category

This tool is useful for having items in a seasonal category; when the season is finished, the results would be 'Expired' from the category. Assign a date from the popup calendar before clicking on [Expire].

### .2.3.2.7 Add results to category

Here you can quickly drop your search results (and the search could have been for just one product, by the way!) into any category you select.If you wish the categorization to start at a future date, use the popup calendar to select that date.

### .2.3.2.8 Add Feature to Results

Quickly attach a feature from the drop-down box to all of the results of the search.

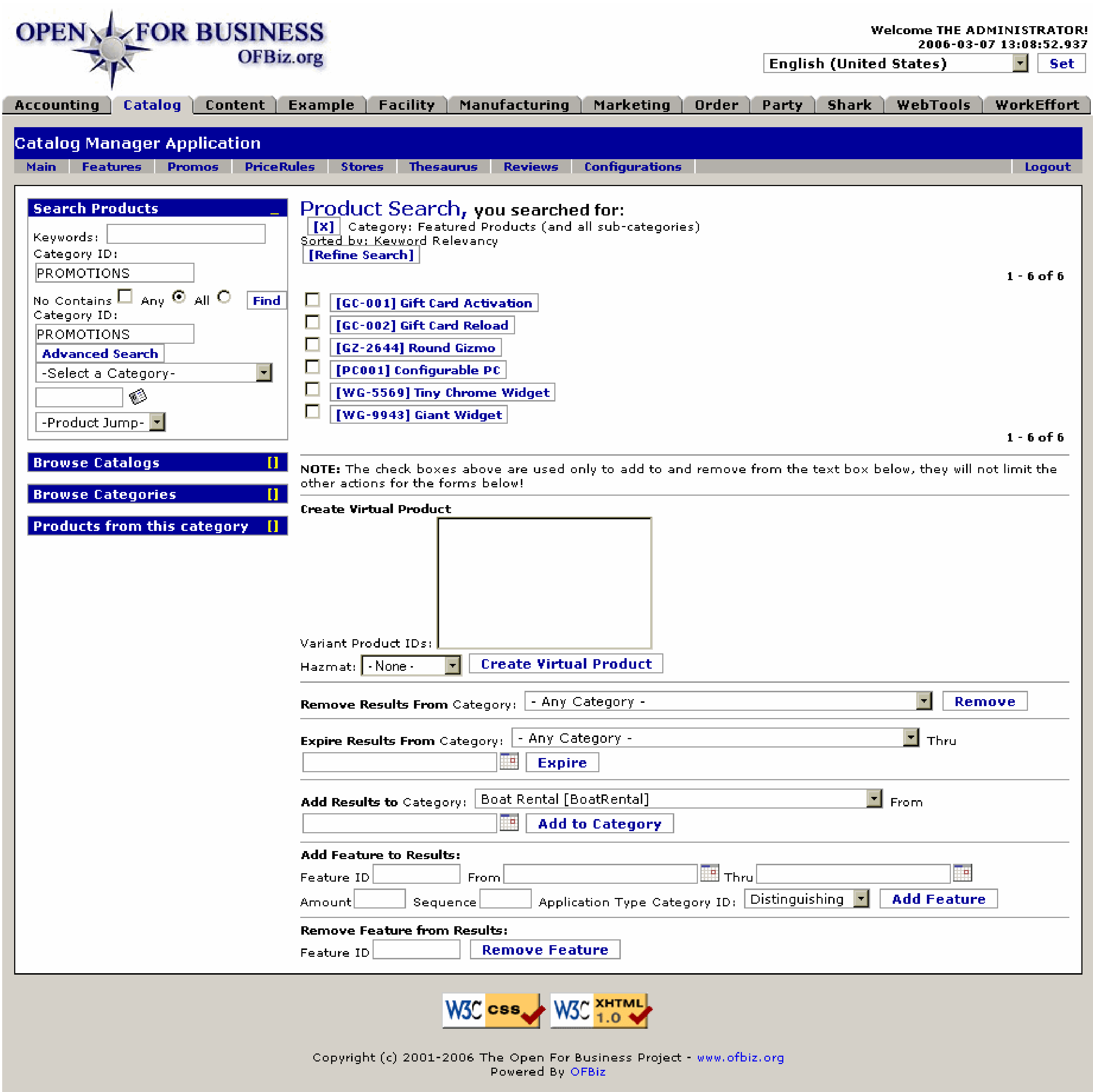
### .2.3.2.9 Remove Feature from Results

If a feature is no longer offered with the products displayed, use this tool to identify the Feature ID and then remove the association.

## .2.4 by Category ID

Enter any or all of the words in a category name; 'Any' will present every category with any of the specified words, 'All' returns only the categories with every word in its name.

### .2.4.1 categorysearch-results




A Category search will give results based upon products assigned to the Category.

### .2.4.2 Discussion

Whether by keyword or category, the radio buttons for Any and All apply.Enter the category into the upper Category ID box, or use the drop-down box and select the Category from there. Results return all products found within that category.The link buttons and the tools given to work with the results are the same as discussed above under the Keywords search.

## .2.5 Advanced Search

Begin an Advanced Search by entering either a Category ID in the input box under the 'Any' and 'All' buttons, or selecting a category in the drop-down input box (or do both!!), then clicking on [Advanced Search].

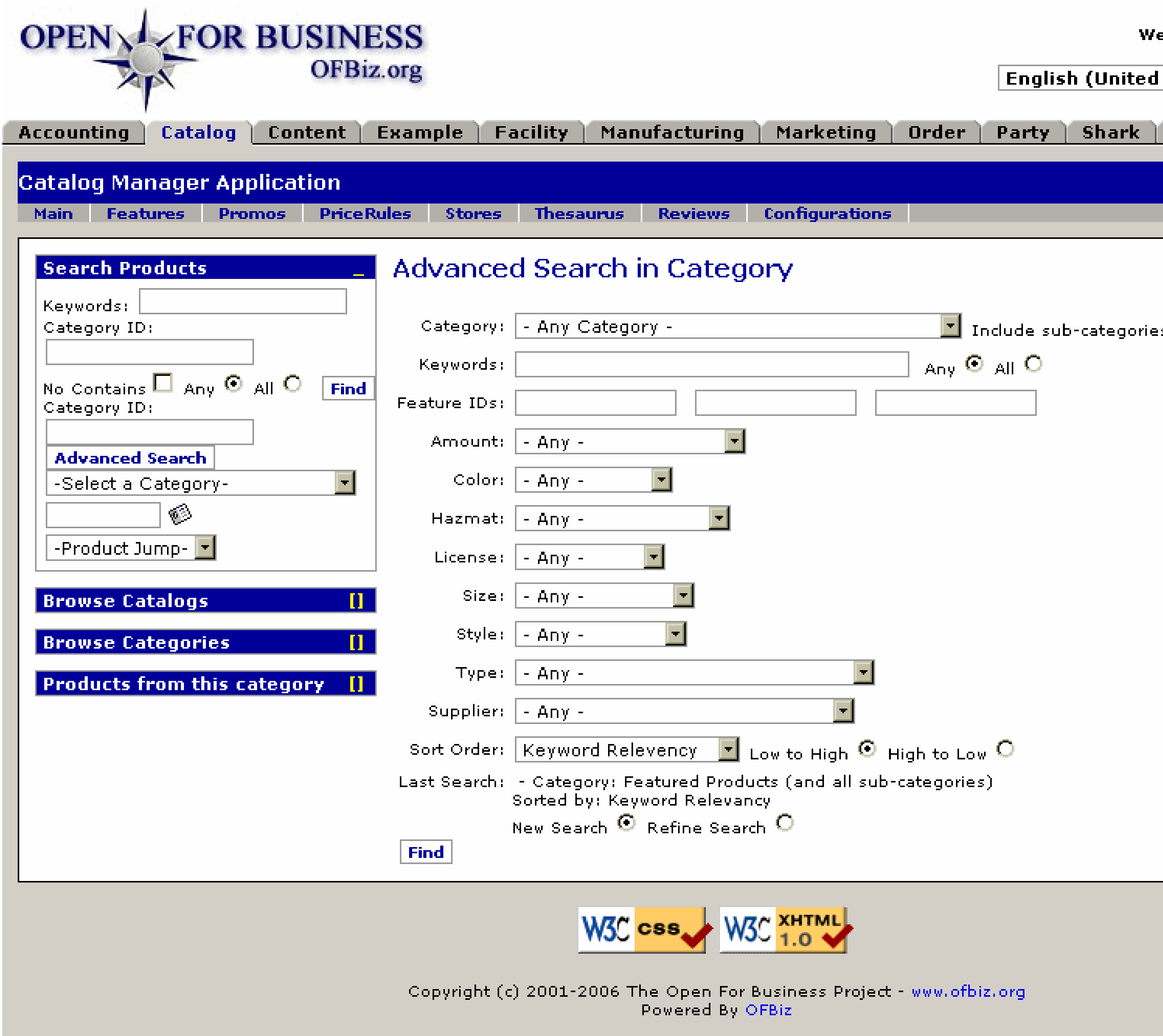
### .2.5.1 Category ID

Enter an existing Category ID in this field, then click the [Advanced Search] link.You may leave this field blank and, if you do not select a category from the drop-down box, the screen returned will be as shown in the graphic below. When a category is indicated, only the search parameters that apply to the category are presented.

### .2.5.2 Select a Category (drop-down box)

Alternately, choose a Category from the drop-down box, then click on the [Advanced Search] link.

### .2.5.3 advancedsearch

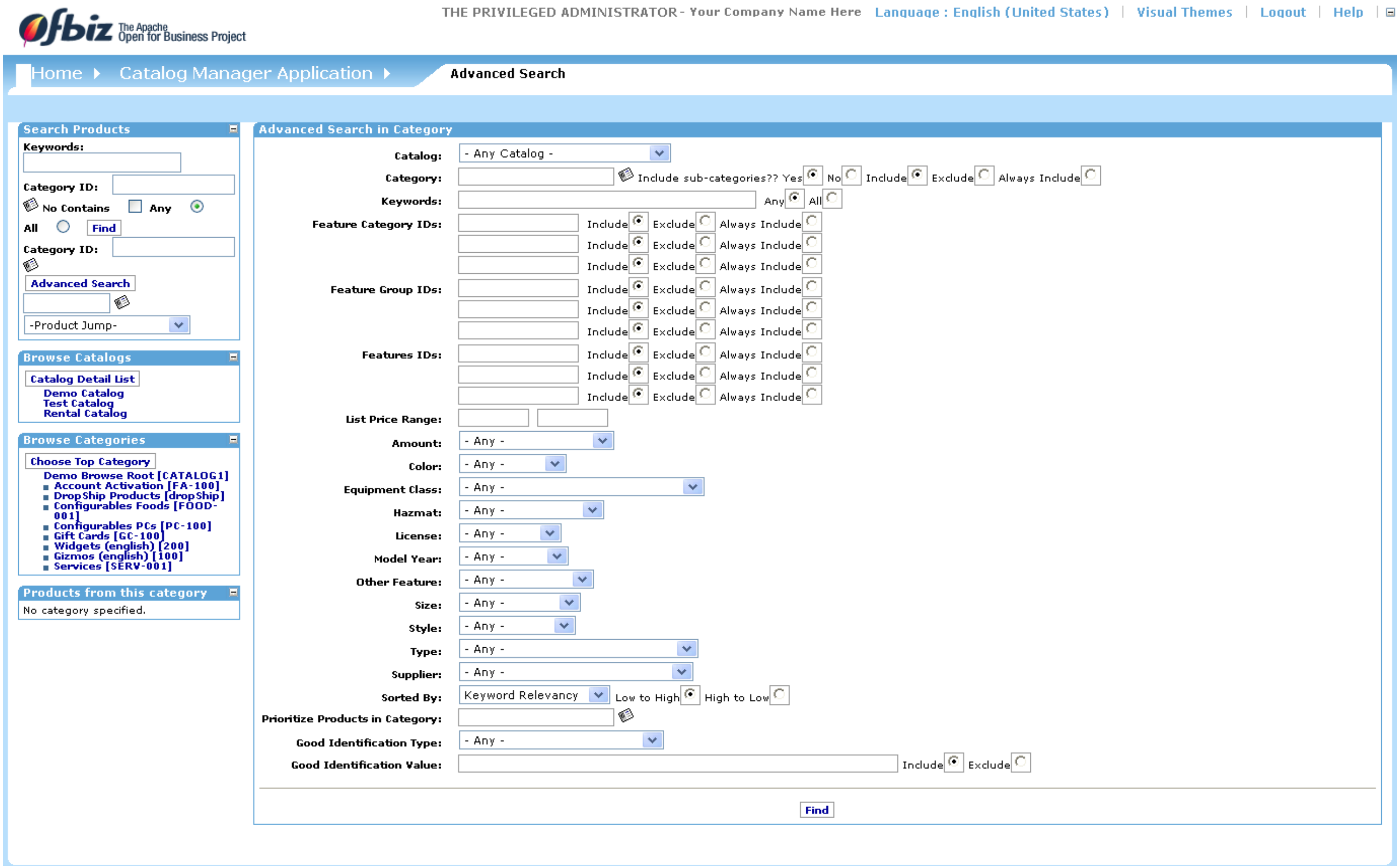



[Advanced Search] brings up this tool with drop-down boxes for various parameters for your chosen Categ

### .2.5.4 link buttons

[Advanced Search] [Find]

## .2.5.5 Advanced Search tools




## .2.5.5.1 Category (drop-down box)

If you had already indicated a category before clicking [Advanced Search], that will be stated here and its choice will determine which of the subsequent drop-down boxes are displayed. If no Category has been chosen yet, you have the drop-down box here from which to choose .Include Sub-Categories: Yes or No by selecting a radio button. Default is Yes; select No if you do not want sub-categories searched.

## .2.5.5.2 Keywords

Enter one or more keywords for the search. Then choose either the Any or All radio button. This will indicate whether the results should be determined by finding Any one or more of the words, or only the results which include All of the words.

## .2.5.5.3 Feature IDs (3 choices)

Entry must be using established IDs already in the database; can be any ID without having to search through drop-down windows.

### .2.5.5.4 Amount (drop-down box)

Choices might include something like the following:

- - Any -
- $10.00 [2002]
- $25.00 [2003]
- $50.00 [2004]
- $100.00 [2005]
- Other Amount [2006]

### .2.5.5.5 Color (drop-down box)

Possible choices might include:

- - Any -
- Black [9000]
- Silver [9001]

### .2.5.5.6 Hazmat ()drop-down box)

Choices could be stated as:

- - Any -
- Hazmat [1000]
- Non-Hazmat [1001]

### .2.5.5.7 License (drop-down box)

Choices might include:

- - Any -
- BSD [8002]
- GPL [8001]
- LGPL [8000]
- MIT [8003]

### .2.5.5.8 Size (drop-down box)

Sizes might be expressed as:

- - Any -
- 3-Wheel [9002]
- 4-Wheel [9003]

### .2.5.5.9 Style (drop-down box)

Style choices might include:

1. - Any -Classic [2000]
2. Holiday [2001]

### .2.5.5.10 Type (drop-down box)

Types could be presented as the following:

- - Any - G
- ift Card Type - See idCode [2008]
- Gift Card Type - See idCode [2009]

### .2.5.5.11 Supplier (drop-down box)

Suppliers listed as such in your Party Manager are presented in the drop-down box.This should not be specified unless you wish to exclude items from any Supplier EXCEPT the selected one.

### .2.5.5.12 Sort Order (drop-down box)

Select a sort-order basis from the drop-down box, then choose a radio button for 'High to Low' or 'Low to High.'

Choices for the sort basis might include:

- Keyword Relevancy
- Product Name
- Internal Name
- Popularity by Orders
- Popularity by Views
- Customer RatingList
- PriceDefault

- Price Average
- CostMinimum
- PriceMaximum
- Price

#### .2.5.5.13 Last Search

Details of the last search and an option to start a new search or refine the last search are given.

## .2.6 Product Jump

This time-saving tool will take you directly to the working tab of the Catalog Manager with known data already populated for whatever item you enter.

### .2.6.1 Item sought

This is the working box to the left of the Product Jump drop-down box. Enter an attribute, a feature, the product ID, whatever known factor you are wanting to work with.

### .2.6.2 Jump-to box

Click on the - Product Jump - drop down box. Select the topic to which you wish to jump and you will be immediately taken to the appropriate working screen. An example is shown below.

Possible destinations for the Product Jump may include

- QuickAdmin
- Product
- Prices
- Content
- Ids
- Categories
- Keywords
- Associations
- Manufacturing
- Costs
- Attributes
- Features
- Facilities
- Locations
- Inventory
- Suppliers

- Accounts
- Variants
- Configurations

### .2.6.3 Found-Example


Avoid the need to click through tabs and trees by using the Product Jump drop-down box and the needed Product.

## .2.7 Product Found!

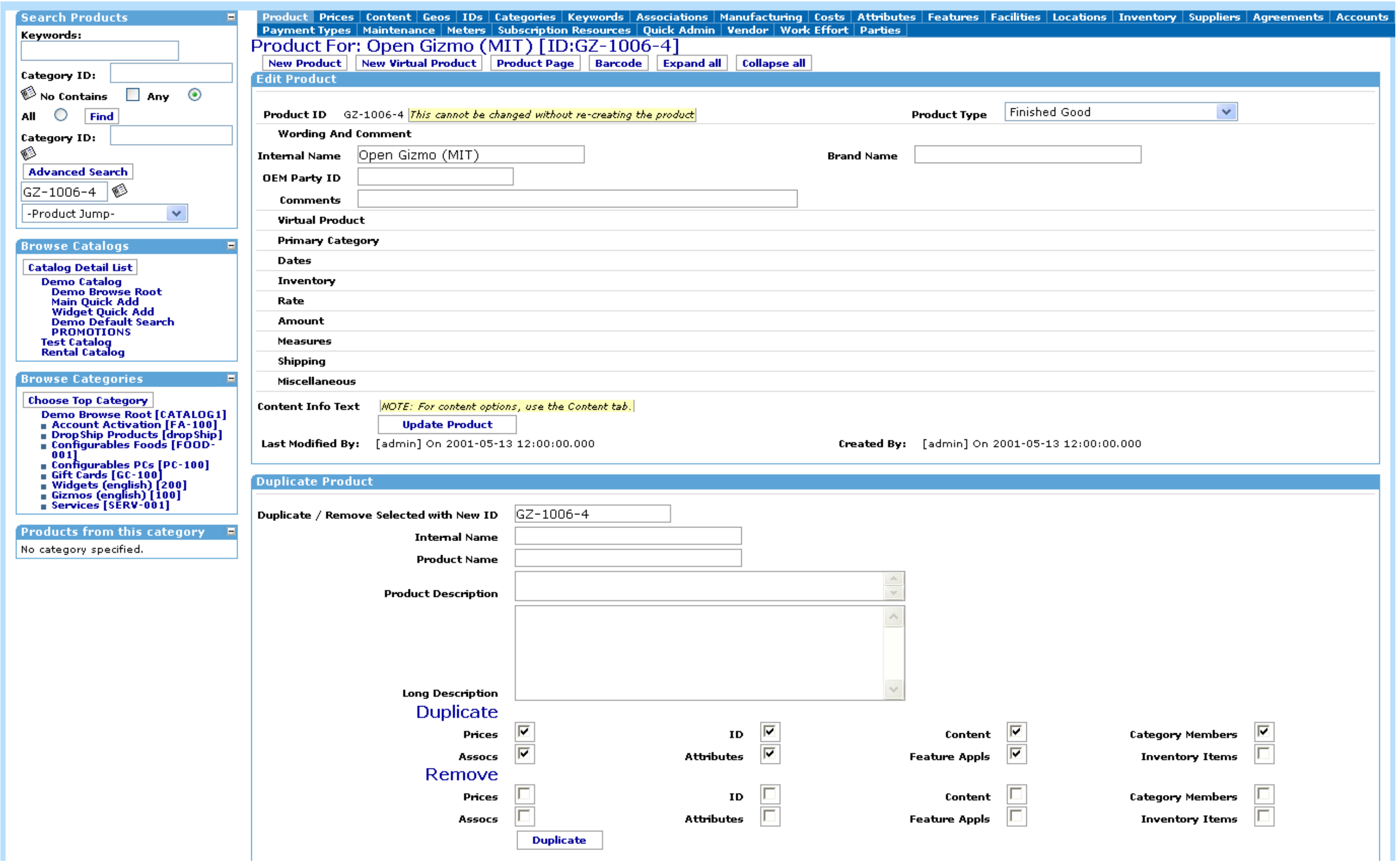
### .2.7.1 Discussion

When you have found the Product or Item you have sought, in a list, just click on the ID number! You will be taken directly to the screen shown below, labelled Product-Found.

Note all of the Tabs across the top of the screen where you can perform a multitude of tasks related to the product, its categories and catalogs. Each of the major tabs and their sub-tabs are discussed in the topics following.

Note also the many functions available to work with your products or services and present them in your Catalog. These will all be discussed under their tab-topics, below.

## .2.7.2 Product-Found

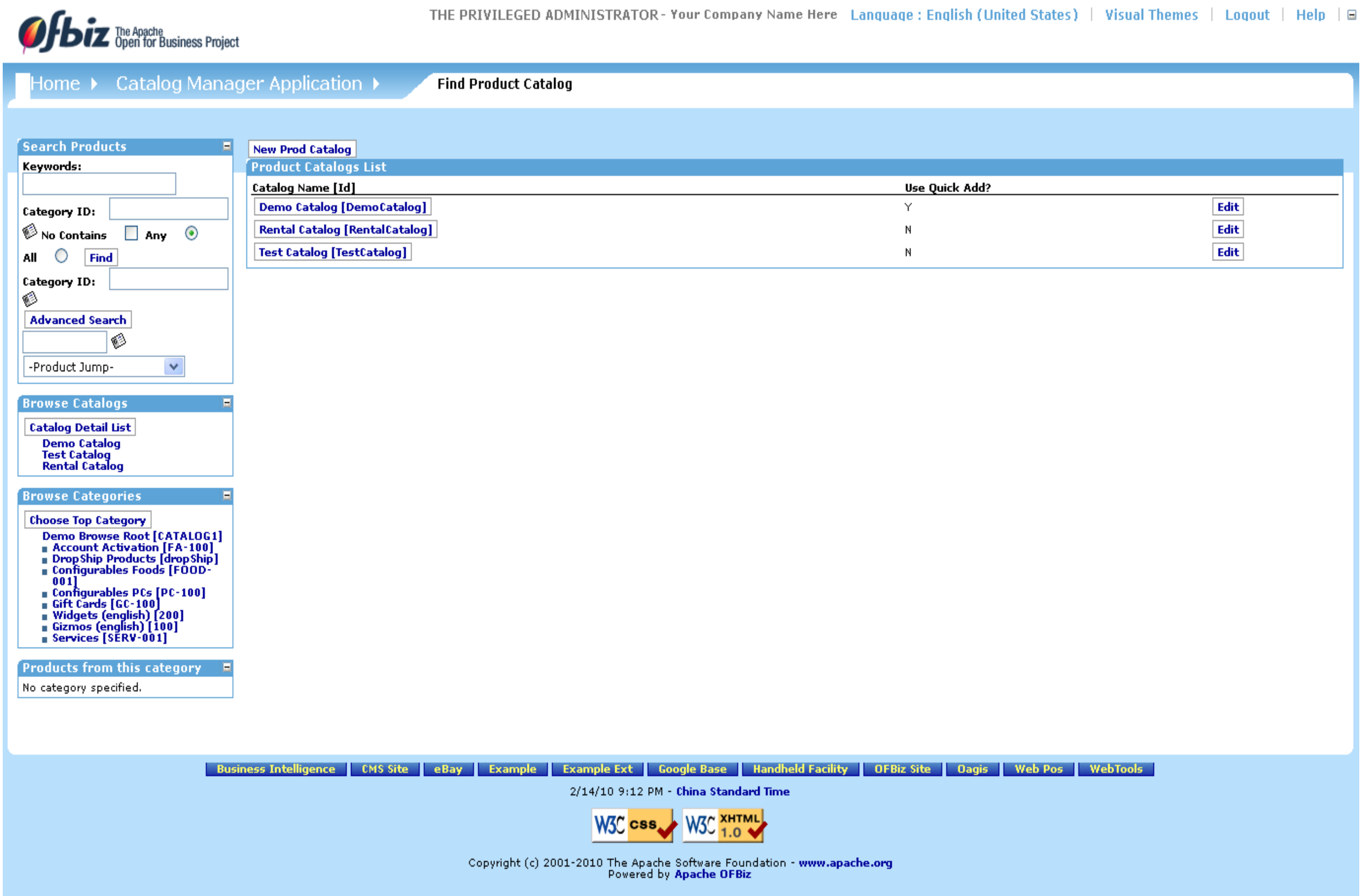



# .3 Browse Catalogs

## .3.1 Catalog Detail List

[Catalog Detail List] is the link button to open the table of existing catalogs, shown below. Alternately, you can click on one of the Catalogs listed in the Navigation box to find Categories within the Catalogs from which you could select.

## .3.2 FindProdCatalog




“Browse Catalogs”is your portal to existing Catalogs.Click either the Name link or the [Edit] button to work with that catalog.

## .3.3 link buttons

[Create NewProd Catalog] [Edit]

## .3.4 Table of Existing Catalogs

### .3.4.1 Catalog Name ID

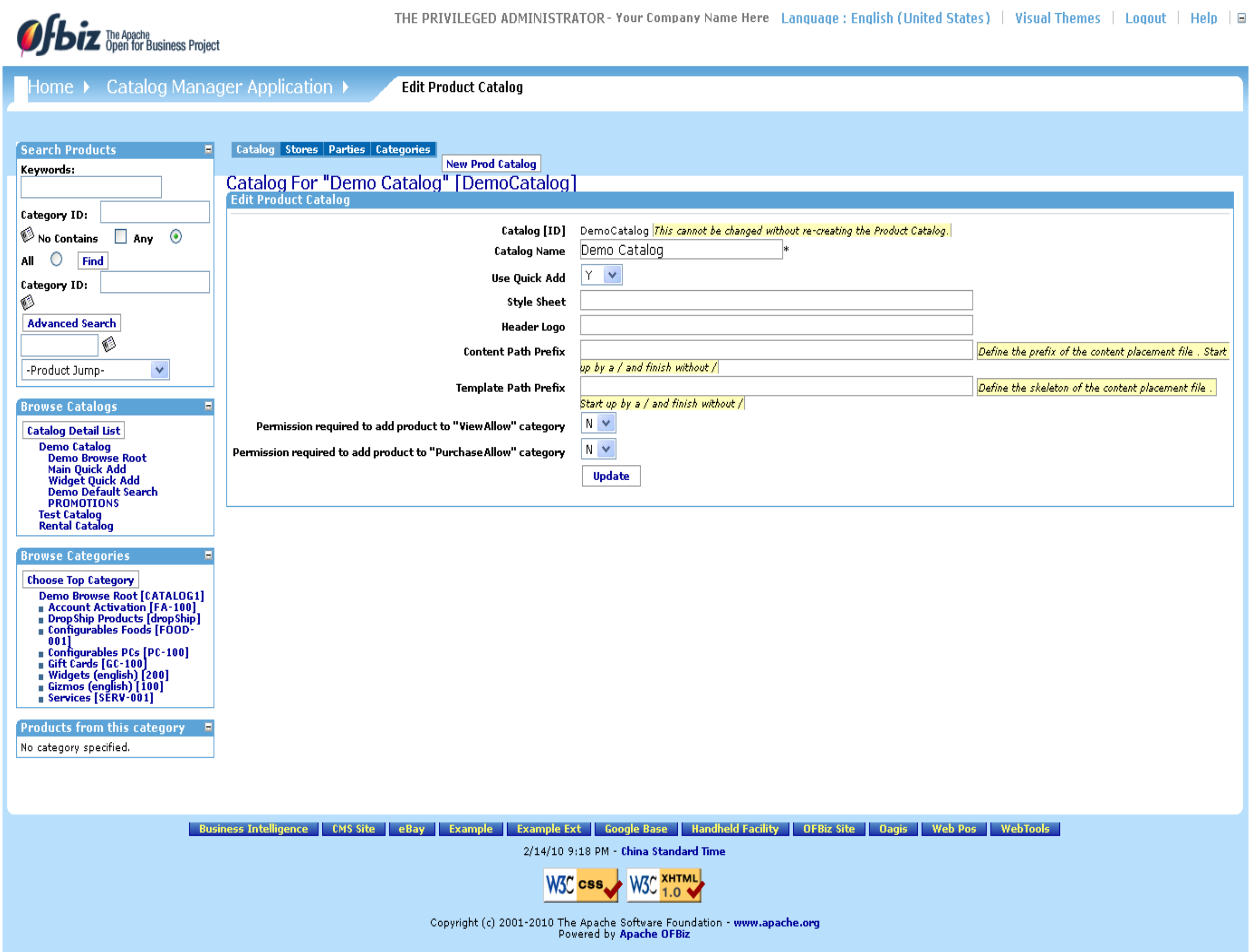
Select either [Edit] or the catalog [ID] to link to the Edit Catalog screens.

## .3.4.2 Use Quick Add?

If the Catalog is set up to work with the QuickAdd function, a Y for yes will appear here.

## .3.4.3 Edit catalog

### .3.4.3.1 EditProdCatalog




Here you may perform top-level editing of the catalog's name,log,style,file paths,etc.

### .3.4.3.2 link buttons

[NewProd Catalog] [Update] [Catalog] [Stores] [Parties] [Categories]

### .3.4.3.3 Discussion

See more complete treatment of the edit function below under Catalog - Edit Product Catalog screens.

## .3.5 Catalog Categories

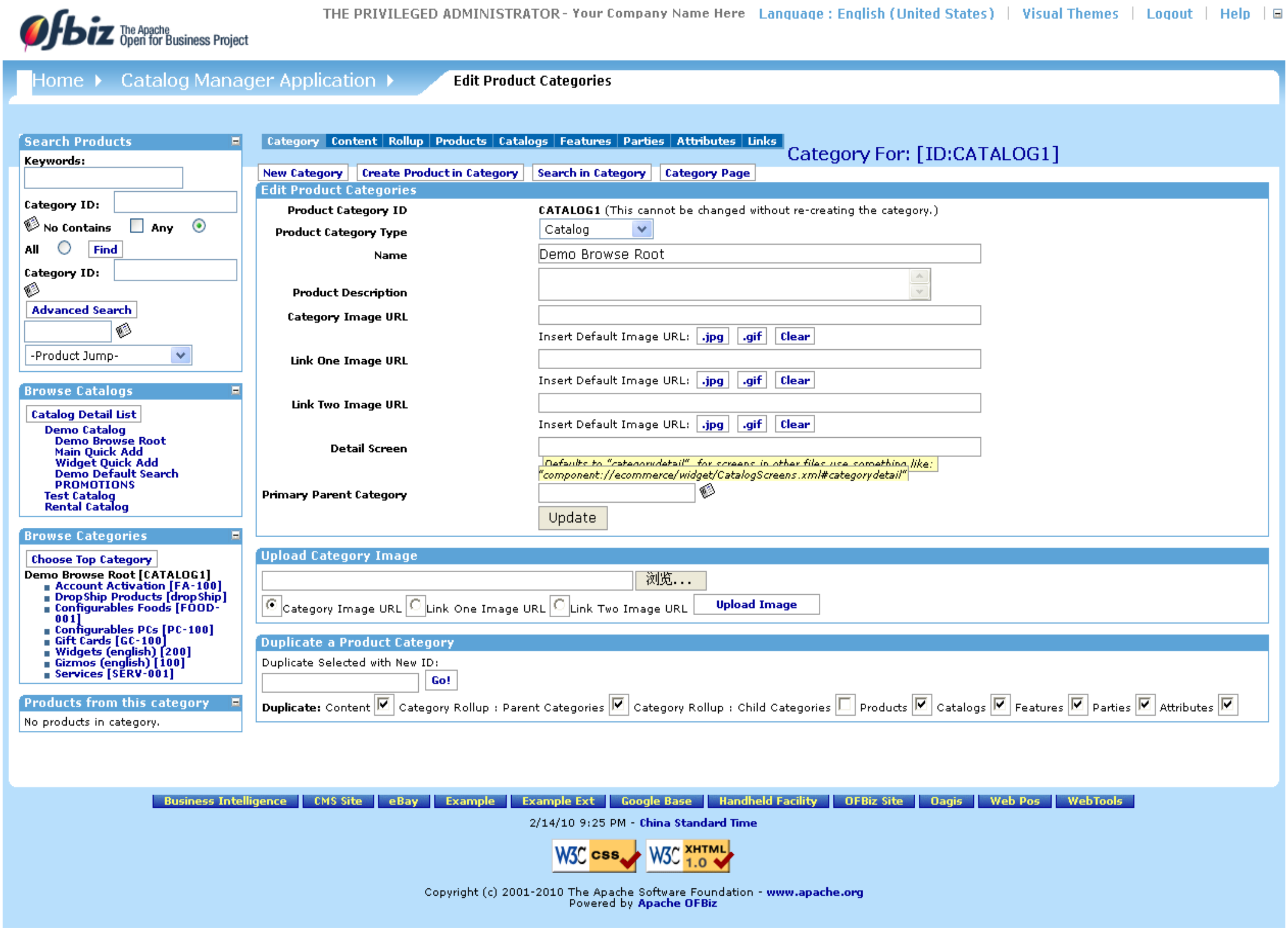
### .3.5.1 Discussion

Most catalogs have several categories of products within them. Some products will be found in multiple categories.

Here in the Navigation bar you can see where the opportunity to Browse Categories is presented. There is also this other approach through the Browse Catalogs section to take a shortcut to major Categories. When you click on the Catalog name, a listing of indented Categories appears. Click on any of them to be taken to the Edit Categories screen for that category.

For details of the Category editing process, see below in the Category -Edit Category screens section.

## .3.5.2 EditCategory



This is the top-level working screen for editing Product Categories under a Catalog.Note the many links to related tasks.

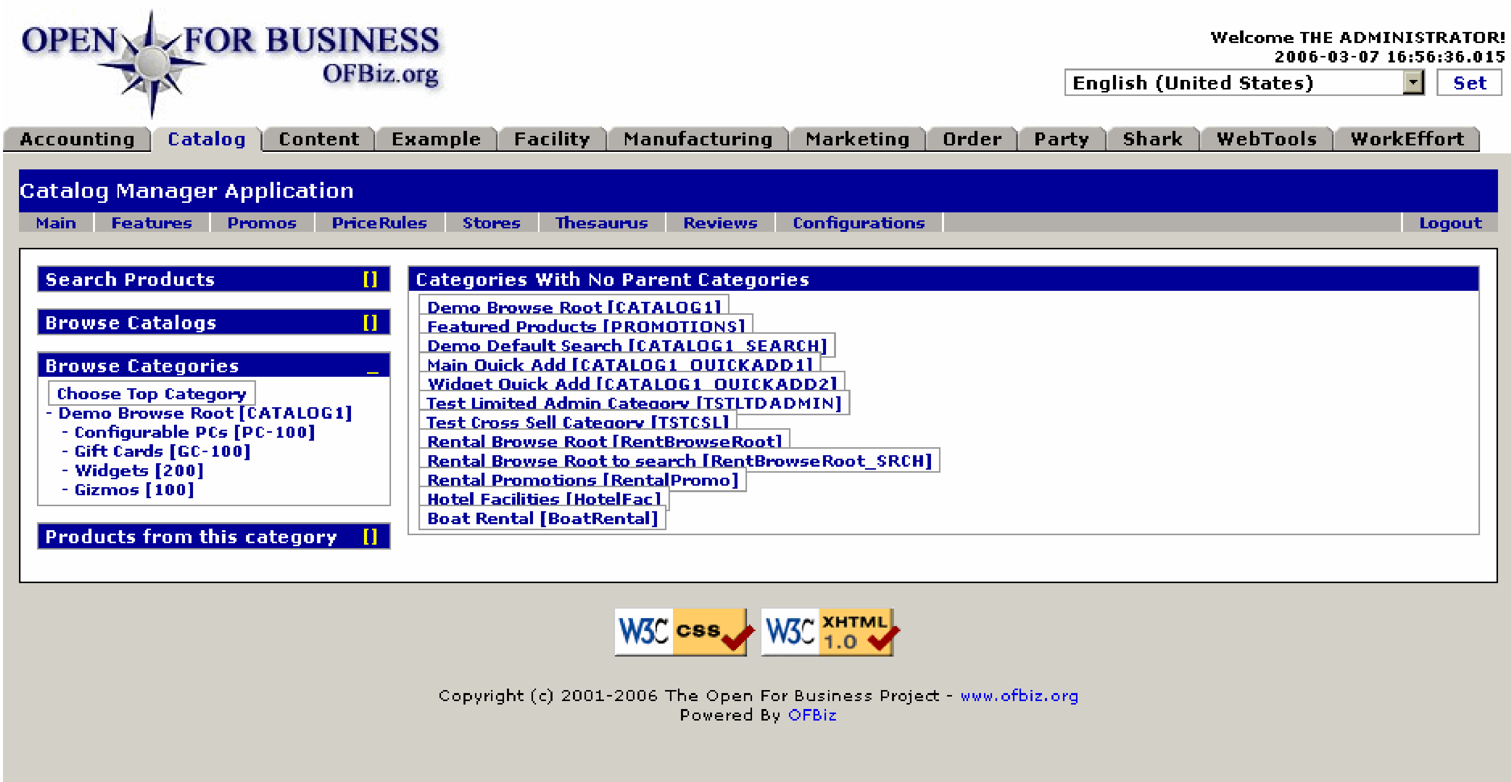
## .3.5.3 link buttons

[New Category] [Create Product in Category] [Search in Category] [Category Page] [.jpg] [.gif] [clear] [Update] [Browse] [Upload Image] [Go!] [Category] [Content] [Rollup] [Products] [Catalogs] [Features] [Parties] [Attributes]

## .4 Browse Categories

## .4.1 Categories With No Parent Category

### .4.1.1 ChooseTopCategory



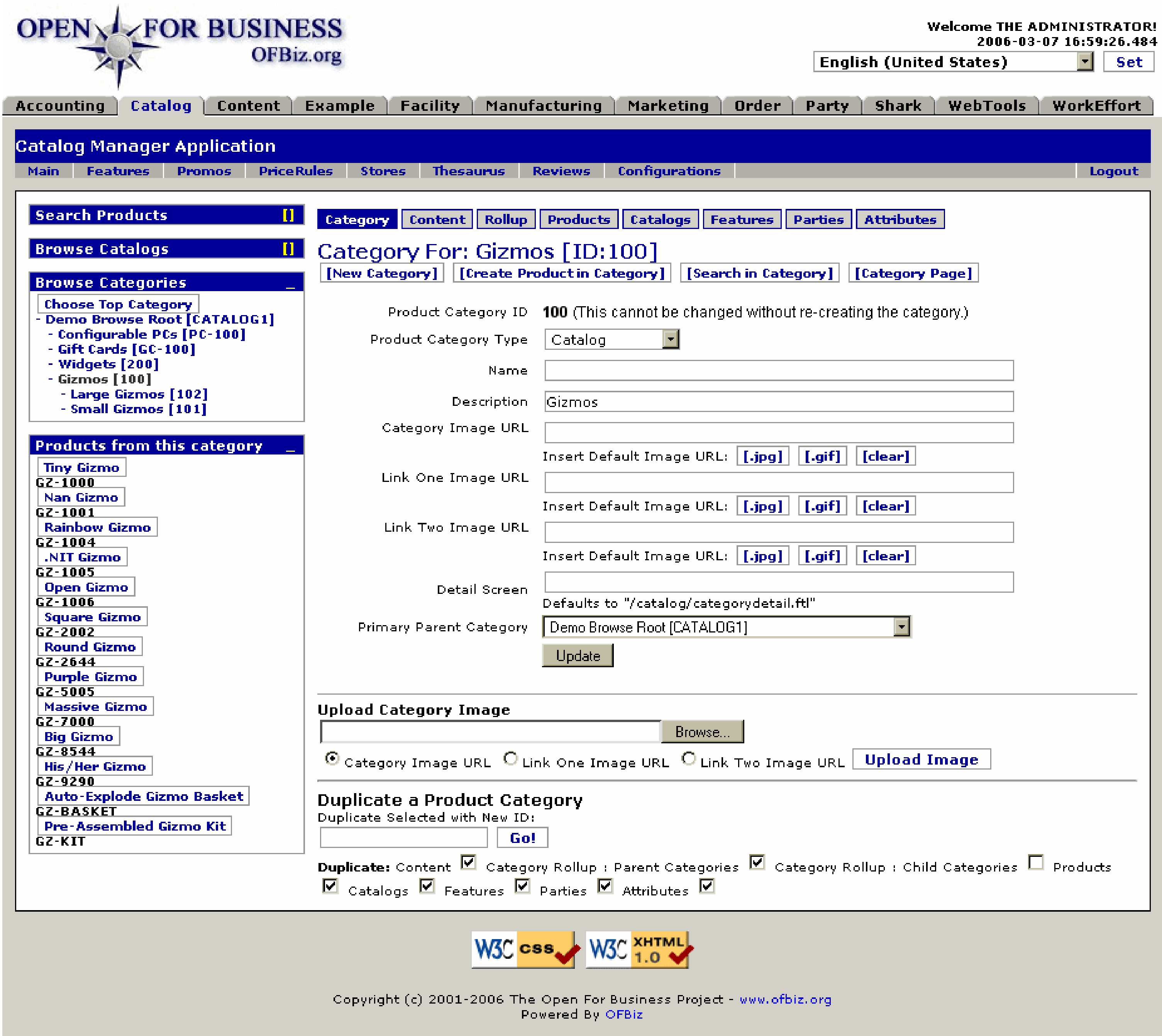

These are Top Level categories, not subordinate to a higher Parent; your list will differ. Click on a Category to edit.

### .4.1.2 Choose category

Selecting any of the listed Top Categories takes you to the Edit Category screen.

## .4.2 Edit Category

### .4.2.1 EditCategory




Edit the selected Category, starting with this screen. Other tabs shown will carry the same Category into their topics.

### .4.2.2 link buttons

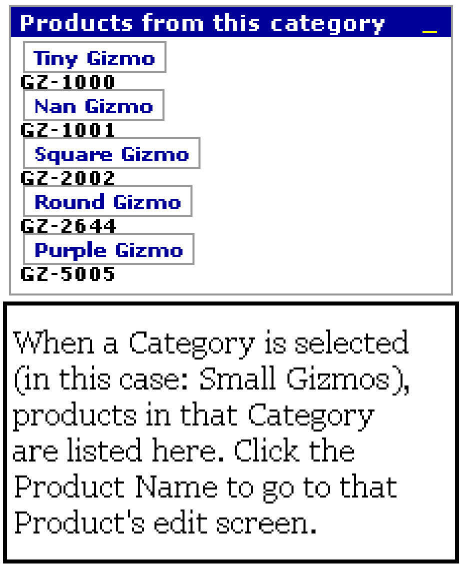
[Choose Top Category] [New Category] [Create Product in Category] [Search in Category] [Category Page] [.jpg] [.gif] [clear] [Update] [Browse] [Upload Image] [Go!] [Category] [Content] [Rollup] [Products] [Catalogs] [Features] [Parties] [Attributes]

### .4.2.3 Details follow

Detailed discussion of the processes and their related screens are discussed below under Category - Edit Category screens.

## .5 Category Products

### .5.1 CategoryProducts



# .6 Main: Catalog Administration Main Page

## .6.1 main


This is the screen greeting you when you start Open For Business or later click on the Main tab of the Catalog Manager.

## .6.2 link buttons

[Edit Catalog] [Create New Catalog] [Edit Category] [Create New Category] [Edit Product] [Create New Product] [Quick Create Virtual from Variants] [Find Product] [Auto Create Keywords for All Products] [Fast Load Catalog into Cache]

## .6.3 Opening Screen

Your first screen when opening OFBiz presents you with a wealth of options. The Navigation Panel on the left has already been discussed above. Select any Tab (from the top row of tabs) to be taken from here to other Managers within OFBiz. Or select one of the functions discussed below to perform operations within the Catalog Manager application.

## .6.4 Edit Catalog with Catalog ID:

Takes you to the Edit Catalog screen for the Catalog ID you have entered. [Create New Catalog] screen is similar but blank and should be used to create a new Catalog. The same Create screen appears when you click on [New Prod Catalog] from the Edit Catalog screen.See Catalog - Edit Product Catalog screens below for details.

## .6.5 Edit Category with Category ID:

Takes you to the Edit Category screen for the Category ID you have entered. [Create New Category] screen is similar but blank and should be used to create a new Category. The same Create screen appears when you click on [New Category] from the Edit Category screen.For further details, see the topic Category - Edit Category screens, below.

## .6.6 Edit Product with Product ID:

Takes you to the Edit Product screen for the Product ID you have entered. [Create New Product] screen is similar but blank and should be used to create a new Product. The same Create screen appears when you click on [New Product] from the Edit Product screen.For further details, see the topic Product - new Product or edit, below.

## .6.7 Find Product with ID Value:

Takes you to the Find Product screen shown below. When you enter a valid ID, the Product Name is shown in a boxed link; click on that Name to go to the Product page.

## .6.7.1 FindProductByID


Results of a Find Product search. Click on the Product Name to be taken to the EditProduct screen.

## .6.7.2 link buttons

[Find]

## .6.8 Auto Create Keywords for All Products

When selected, performs a keyword creation for all existing products. >> Resulting screen message, e.g.: 'The Following Occurred: Keyword creation complete for 47 products.'

## .6.9 Fast Load Catalog into Cache

### .6.9.1 Resulting code report after loading cache:


Results on screen from clicking the [Fast Load Catalog into Cache] link.

## .7 Catalog - Edit Product Catalog screens

### .7.1 Discussion of the Edit Catalog screens

You will be taken to the Edit Catalog screens whenever you select a catalog by name or ID from the Browse Catalogs tool, from the Catalog Administration Main Page - Edit Catalog tool, or from anywhere in the entire OFBiz application where you might have clicked upon the actively linked catalog name or ID.From within this Edit Catalog tool, you may also be taken as needed to other tools, such as the Party Manager or the Category Edit screen. This is part of the dynamics of OFBiz.For the sake of simplicity, to reduce redundancy, explanations are given only up to the linked application. Please look elsewhere in this documentation to find further information.

## .7.2 Catalog

### .7.2.1 EditProdCatalog


Top-level editing of a Catalog name, log and location, with sub-tabs to other functions.

### .7.2.2 link buttons

[Update] [New Prod Catalog] [Catalog] [Stores] [Parties] [Categories]

### .7.2.3 Prod Catalog ID

This cannot be changed without re-creating the Product Catalog.

### .7.2.4 Catalog Name

This will be shown to your customers, so think of image when giving your catalog a name.

### .7.2.5 Use Quick Add (Y/N)

You cannot use the QuickAdd function unless you elect to have it by your choice here.

### .7.2.6 Style Sheet

The path to your distinctive style sheet which will govern the appearance of your catalog goes here.

### .7.2.7 Header Logo

This will be seen by your customers. Maintain your image and message with the logo presented.

### .7.2.8 Content Path Prefix

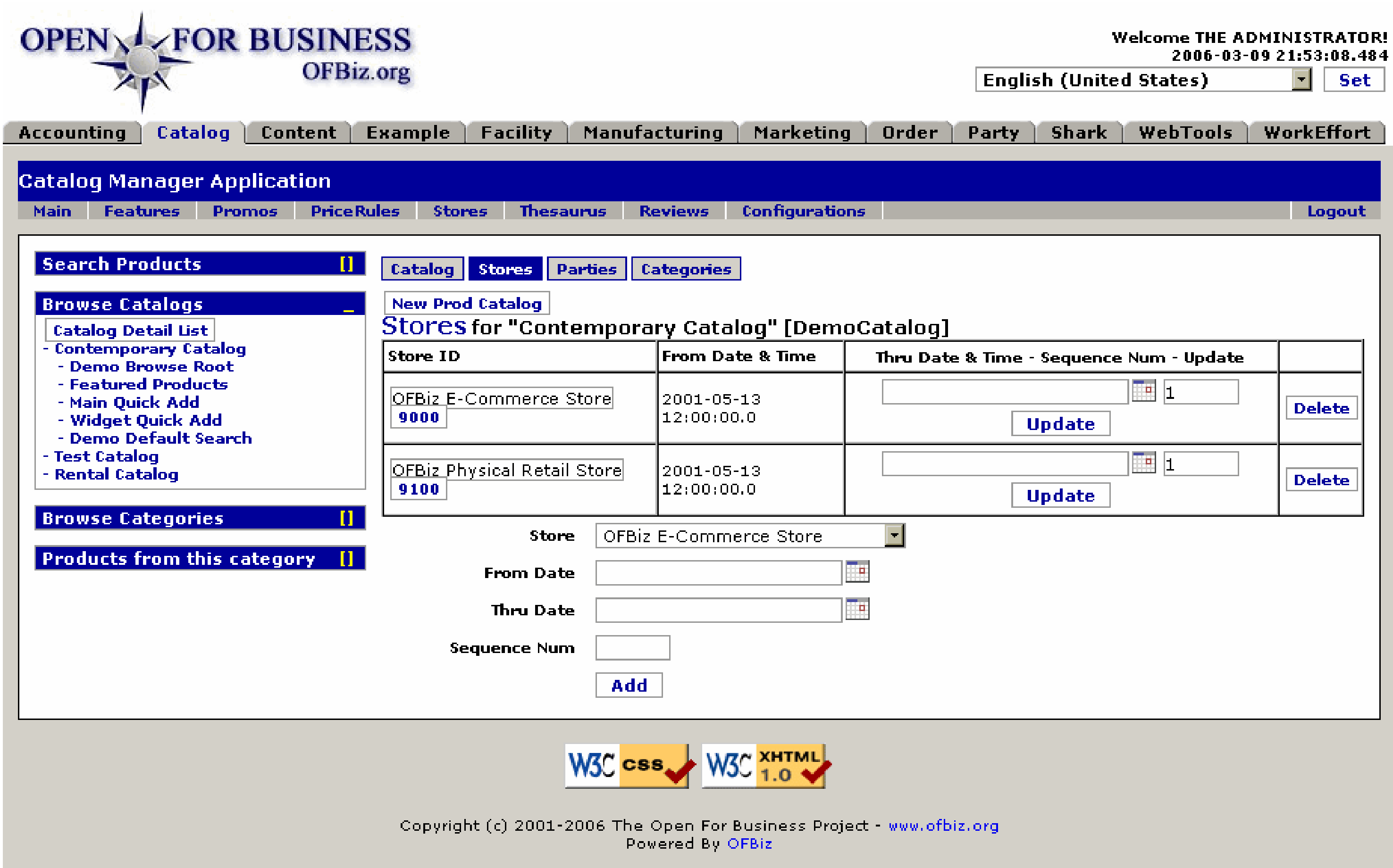
If specified will be prepended to image and other content paths. Should start with a slash but not end with one.

### .7.2.9 Template Path Prefix

If specified will be prepended to template paths. Should start with a slash but not end with one.

## .7.3 Stores

### .7.3.1 EditProdCatalogStores




Update, add or delete Stores served by this Catalog. Time limits may be invoked.

### .7.3.2 link buttons

[New Prod Catalog] [Update] [Delete] [Add][Catalog] [Stores] [Parties] [Categories]

## .7.3.3 Table of existing stores

### .7.3.3.1 Store ID

How the Store is identified by the system.

### .7.3.3.2 From Date and Time

When the Store assignment was made.

### .7.3.3.3 Thru Date and Time (popup calendar)

Expiration of the assignment, if any. May be changed here within the table.

### .7.3.3.4 Sequence Num

May be assigned a Sequence Number; optional.

## .7.3.4 Tool to add stores

### .7.3.4.1 Store (drop-down box)

Select the store for assignment from the drop-down box list of existing Stores.

### .7.3.4.2 From Date (popup calendar)

Defaults to Now as this is generally the time when the assignment is first made. May be modified with a historical date for records purposes or a future date if the assignment is being made before the Catalog will be applicable.

### .7.3.4.3 Thru Date (popup calendar)

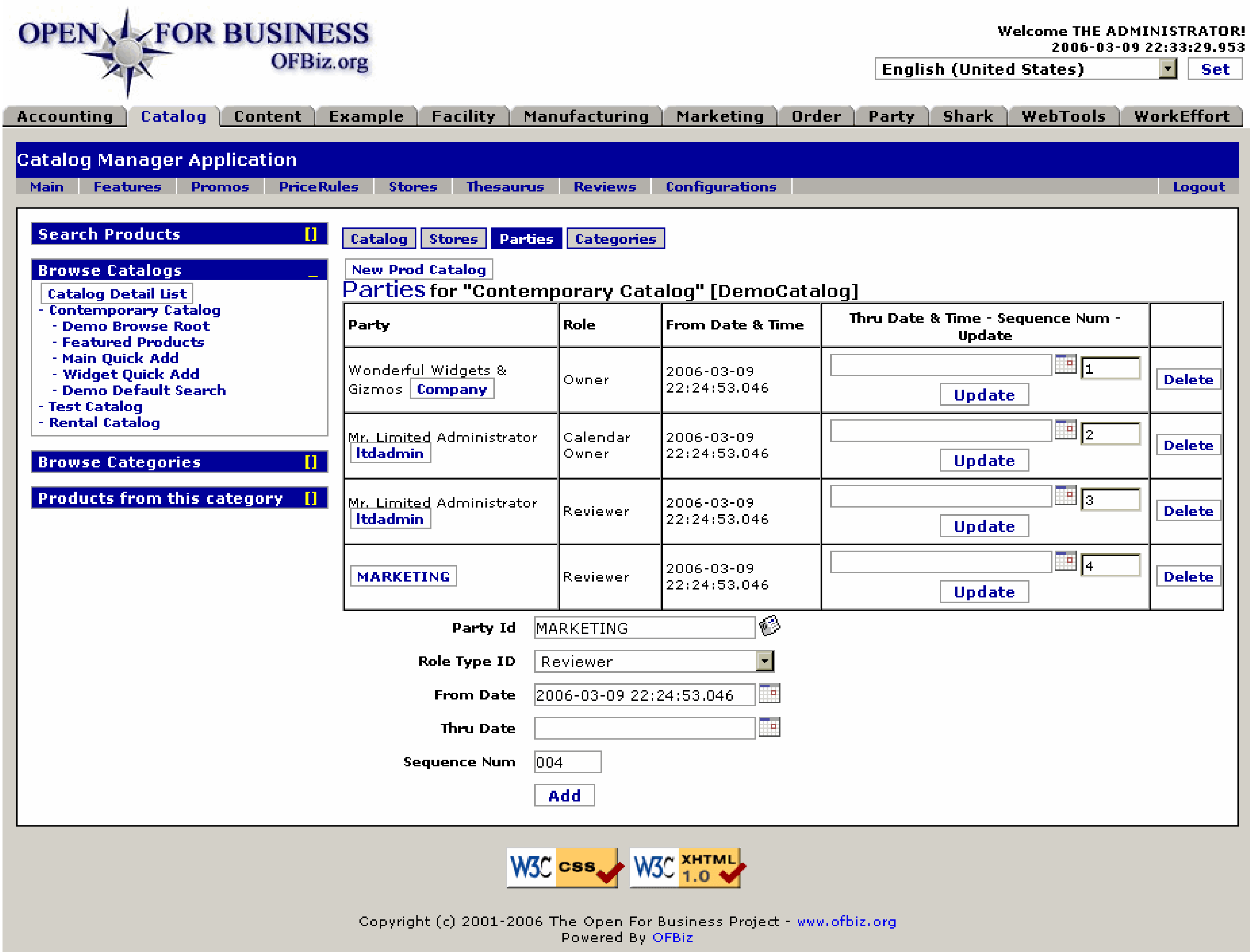
Only if the assignment needs to expire at some future point.

## .7.3.4.4 Sequence Num

An optional Sequencing number, used if there is sequencing of catalogs or stores.

# .7.4 Parties

## .7.4.1 EditProdCatalogParties




Identify which Parties have a role to play in the development, maintenance and administration of this Catalog at this screen.

## .7.4.2 link buttons

[New Prod Catalog] [Update] [Delete] [Add][Catalog] [Stores] [Parties] [Categories]

## .7.4.3 Table of existing parties

### .7.4.3.1 Party

Shows both the Name and the ID if the Party has a name.Note: You should not associate each Customer with the Catalog Store.

### .7.4.3.2 Role

What does the Party do in relation to the Catalog?

### .7.4.3.3 From Date and Time

Generally when the assignment was made; automatically inserted at the time of creation.

### .7.4.3.4 Thru Date and Time (popup calendar)

Only specified if the association is to expire at some point.

### .7.4.3.5 Sequence Num

Optional.

## .7.4.4 Tool to add parties

### .7.4.4.1 Party ID

Popup search tool presents all existing Parties; select the one you want.

### .7.4.4.2 Role Type ID (drop-down box)

Assign the Role from this drop-down list.You cannot designate a Role here if the Party has not already had that Role assigned to in from the Party Manager. If you get an error message when trying to select a Role, go to the Party Manager > Roles tab and establish the Role for the Party there first. If the Role Type you want does not exist, you can create it at the Party Roles tab.

### .7.4.4.3 From Date (popup calendar)

Defaults to the time of creation unless you choose differently.

### .7.4.4.4 Thru Date (popup calendar)

Do not include unless the association is to expire at some future point.

### .7.4.4.5 Sequence Num

Optional.

## .7.5 Categories

### .7.5.1 EditProdCatalogCategories


Update, add, delete or schedule Categories for the Catalog from this screen.

## .7.5.2 link buttons

[New Prod Catalog] [Update] [Delete] [Make Top] [Add][Catalog] [Stores] [Parties] [Categories]

## .7.5.3 Table of existing Categories

### .7.5.3.1 Product Category ID

Includes Product Category name and ID.

### .7.5.3.2 Type

Refers to the promotional type of relationship.

### .7.5.3.3 From Date and Time

When was this assigned?

### .7.5.3.4 Thru Date/Time (popup calendar)

When does this expire? You can update an expiration date from this table.

### .7.5.3.5 Sequence Num

Sequence number in relation to other categories associated with this Catalog.

## .7.5.4 Tool to Add Catalog Product Category

### .7.5.4.1 Product Category ID (drop-down box)

Select from the drop-down box.

### .7.5.4.2 Prod Catalog Category Type Id (drop-down box)

Promotional type of descriptive relationships. Types available from the drop-down box might include:

- —
- Admin Allow (One)
- Browse Root (One)
- Default Search (One)
- Most Popular (One)
- Other Search (Many)
- Promotions (One)
- Purchase Allow (One)
- Quick Add (Many)
- View Allow (One)
- What's New (One)

## .7.5.4.3 From Date (popup calendar)

Defaults to Now when an assignment is made. Alternately you can set the past date when the Category was established or a future date when the Category will be effective.

## .7.5.4.4 Thru Date (popup calendar)

Optional expiration date.

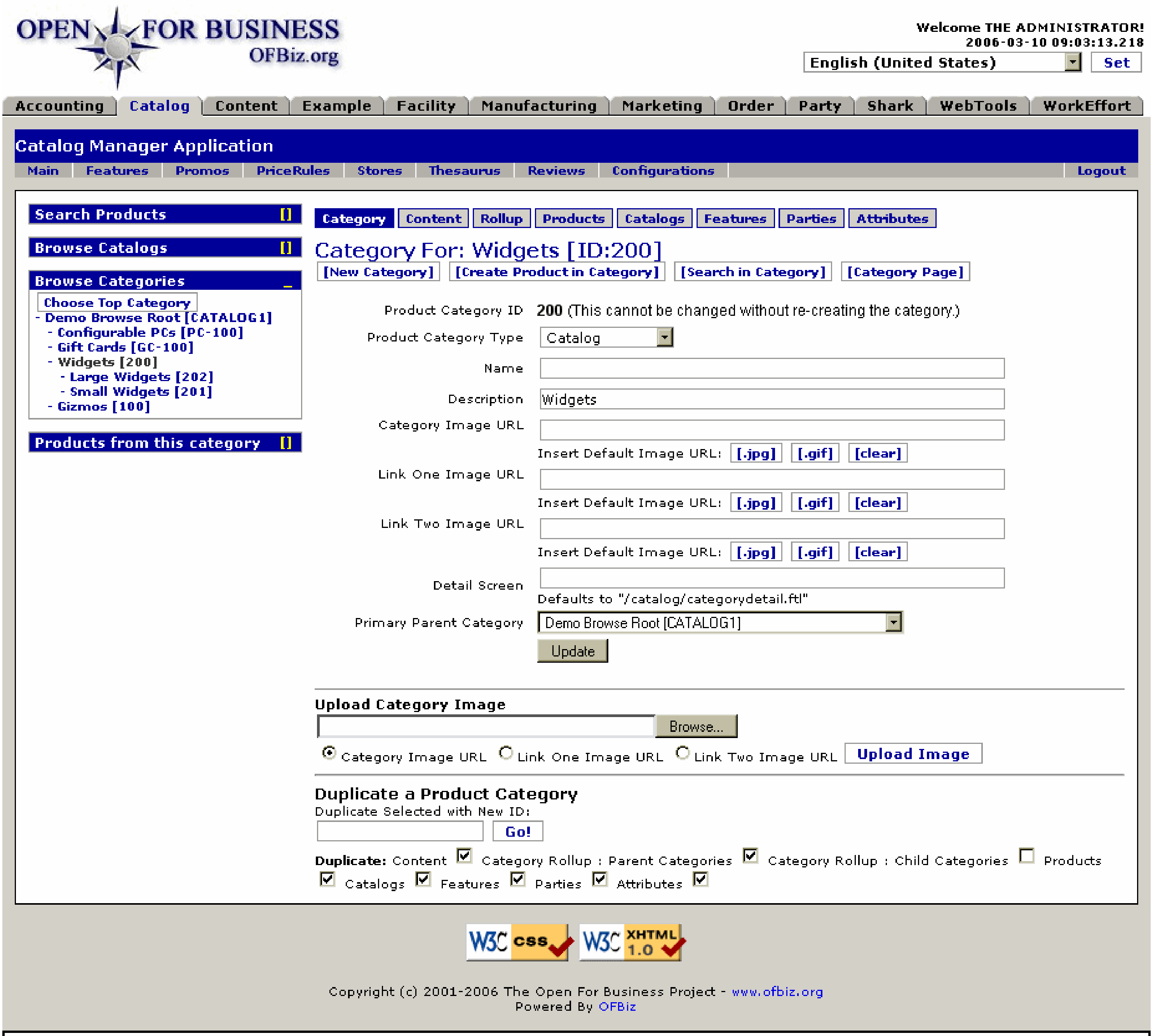
## .7.5.4.5 Sequence Num

Optional sequencing number.

# .8 Category - Edit Category screens

## .8.1 Category

### .8.1.1 EditCategory




Begin the edit of a selected Product Category's screens here.Sub-tabs carry the same Category as you navigate them.

### .8.1.2 link buttons

[New Category] [Create Product in Category] [Search in Category] [Category Page] [Update] [.jpg] [.gif] [clear][Browse] [Upload Image] [Go!] [Category] [Content] [Rollup] [Products] [Catalogs] [Features] [Parties] [Attributes]

### .8.1.3 Product Category ID

'This cannot be changed without re-creating the category.' Confirms which item you are viewing or editing.

### .8.1.4 Product Category Type (drop-down box)

The default is Catalog. Possible choices might include: CatalogCross SellIndustryInternal MaterialsMix and MatchQuick AddSearchTaxUsage

### .8.1.5 Name

Because the name can be quickly changed without changing the ID, you can use the same basic catalog in a variety of circumstances and match the name to fit.

### .8.1.6 Description

Put just a short description here.

### .8.1.7 Category Image URL

Same upload tool for most image assignments. This is the path of any images to be displayed. The image is accessed by url.

### .8.1.8 Link One Image URL

For dynamically linking to an image available to your server.

### .8.1.9 Link Two Image URL

Same as Link One, but for a separate image.

## .8.1.10 Detail Screen

Defaults to '/catalog/categorydetail.ftl'

## .8.1.11 Primary Parent Category (drop-down box)

This is where the top level for this category lives. A major unit (e.g. 'Groceries') might have 'Demo Browse Root' (and so hang off the top level of navigation) but lesser units would have levels of sub-navigation.

## .8.1.12 Upload Category Image

Three radio buttons: Category Image URL / Link One Image URL / Link One Image URL. Choose the right one, then specify or locate [Browse] the URL. Press [Upload] to complete the connection.

## .8.1.13 Duplicate a Product Category

Make another Product Category similar to the selected one instantly! Follow these steps:1. Enter a New ID in the box.2. Click on the checkboxes until they reflect which parts of this Product Category you wish to continue into the new one. (Remember, you can edit these after the new Product Category is created.)3. Click the link [Go!].

## .8.1.14 New Category screen

Takes you to the same screen except you specify new Product Category ID.

## .8.1.14.1 EditCategory-new


Fields are as described in the top section, above, except you create the Product Category ID. Click [Update] to create.

## .8.1.15 Create Product in Category screen

Items for data entry dependent upon several factors; following are typical.

## .8.1.15.1 createProductInCategoryStart

Tool for creating a new Product in the Category. Click [Check Existing] to proceed.

## .8.1.15.2 link buttons

[Back to Edit Category] [Check Existing] [New Category] [Create Product in Category] [Search in Category] [Category Page] [Category] [Content] [Rollup] [Products] [Catalogs] [Features] [Parties] [Attributes]

## .8.1.15.3 Internal Name

The name used for this product internally to the company. Could be the name used by your supplier.

## .8.1.15.4 Product Name

The marketing or branding name which will be seen by your customers.

## .8.1.15.5 Short Description

This can be ad-talk or functional; what makes product different.

## .8.1.15.6 Default Price

The price charged in the absence of any promotional or volume purchasing considerations.

## .8.1.15.7 Average Cost

What the product costs you to have available to offer, on the average.

## .8.1.15.8 Check Existing screen

### .8.1.15.8.1 Check Existing screen

Presents table of any/all existing products in selected category. Your newly-created (proposed addition) product is shown at the bottom of the screen.Click on [Create New Product] when ready.

### .8.1.15.8.2 createProductInCategoryCheckExisting


Shows if the Product already "exists" in this Category. If not, enter a New Product ID and click [Create New Product].

### .8.1.15.8.3 link buttons

[This is it] [Create New Product] [Back to Edit Category] [New Category] [Create Product in Category] [Search in Category] [Category Page] [Category] [Content] [Rollup] [Products] [Catalogs] [Features] [Parties] [Attributes]

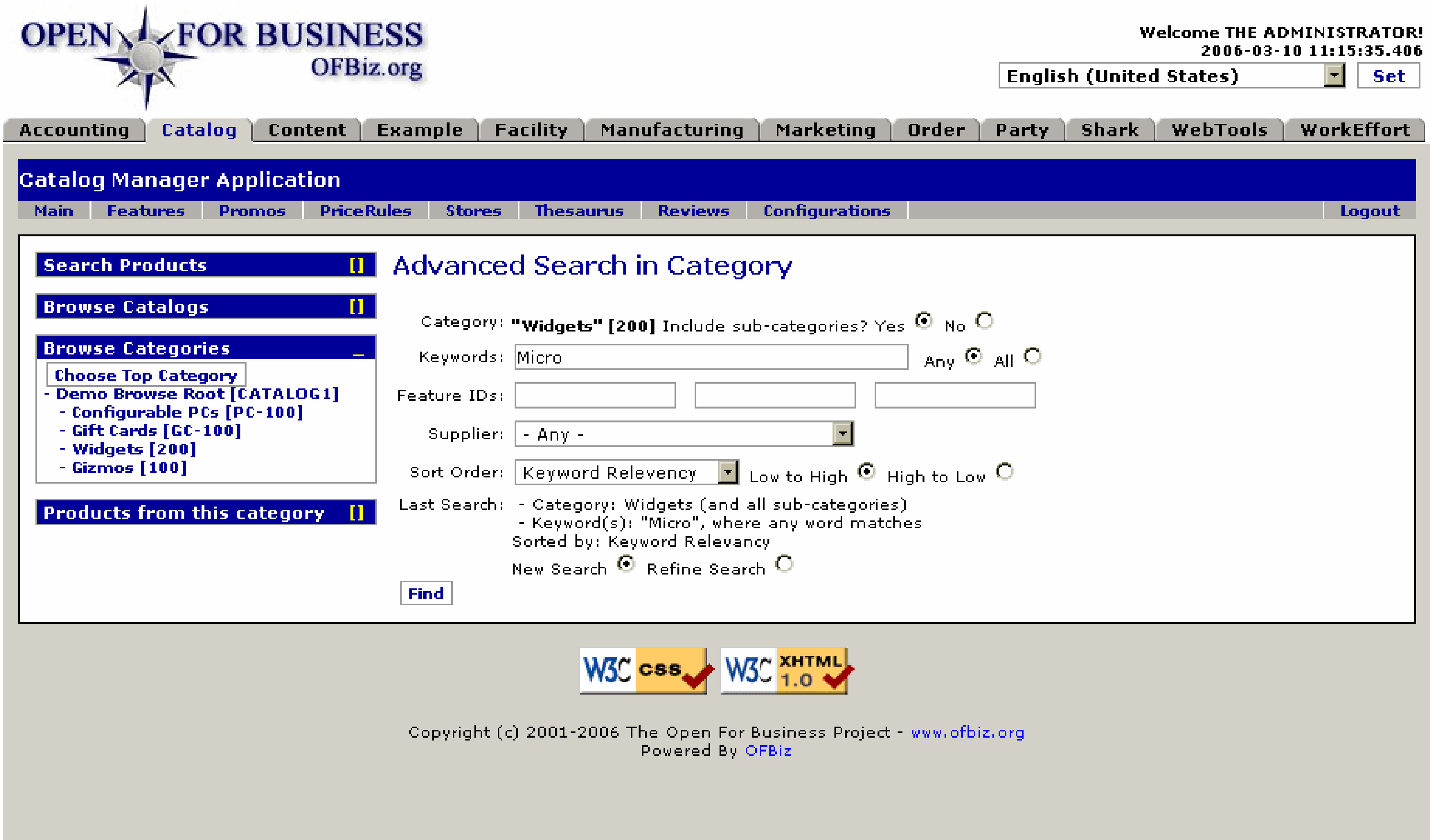
### .8.1.15.8.4 Discussion

At this point in the 'Create Product In Category' process, two paths exist to take you to the Product Edit > Categories screen.

1. If the Product you want appears in the Table, click on the [This is it] link which will take you to the Product Edit screen. Make any changes you need there, then click on the Categories tab. Here you can add the Product to any Category that exists.
2. If the Product does not exist, give it a Product ID, click on [Create New Product], and you will be at the same Product Edit screen. Complete the details there, then click on the Categories tab to add the product to the desired Categories. These screens are discussed further below under the section Product - new Product or edit.

## .8.1.16 Search In Category screen

### .8.1.16.1 advancedsearch-inCategory




Advanced Search in Category helps you find any item or related items already assigned to the Category.

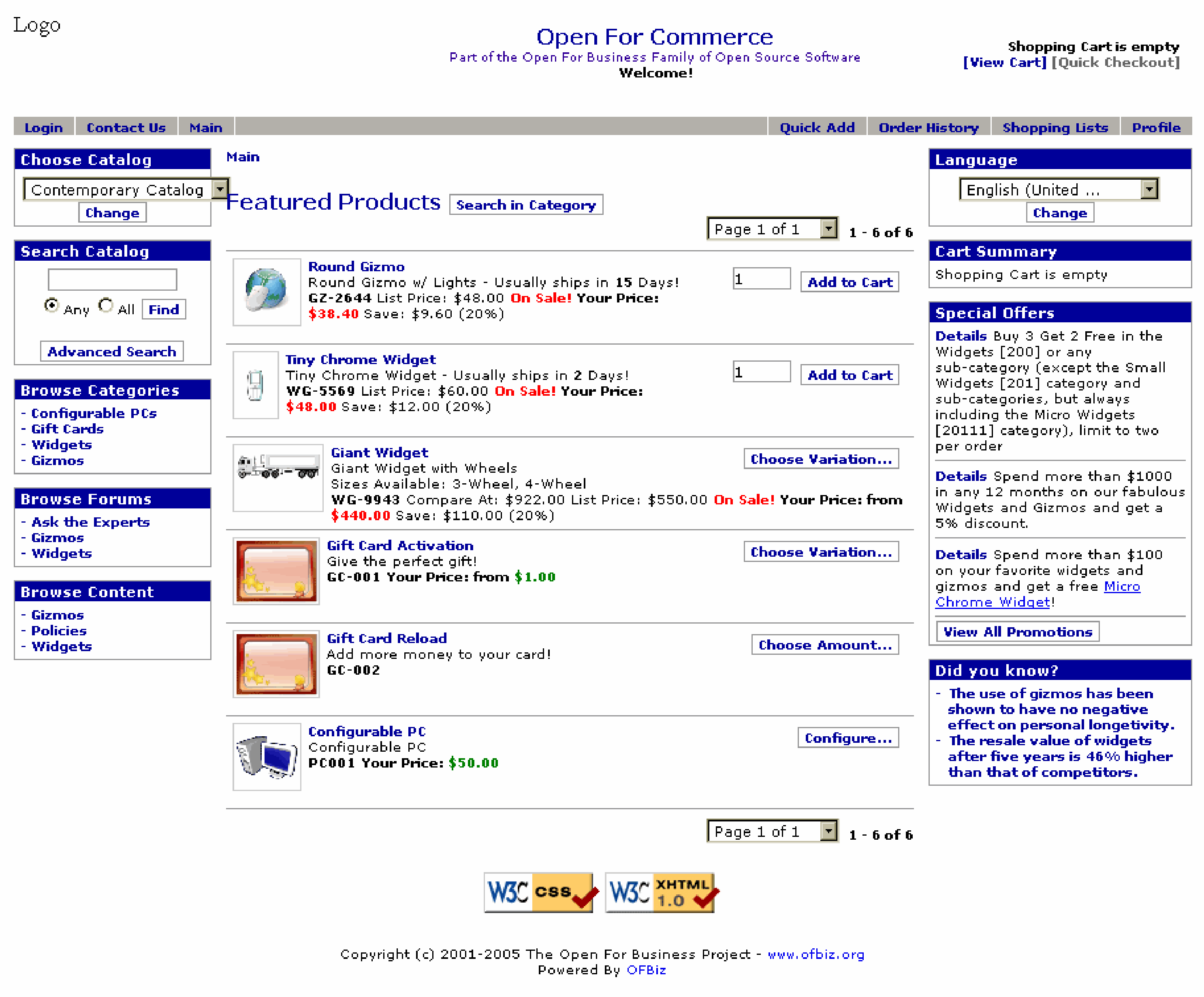
### .8.1.16.2 Discussion

This Advanced Search function has already been described above, under Search Products > Advanced Search. The only difference is that the Category is already populated from which your search will start.

## .8.1.17 Category Page

Takes you to the Featured Products - Search in Category screen in the active catalog.

## .8.1.17.1 category




Shows you the e-commerce page in the current catalog with these Featured Products in the Category.

## .8.2 Content

### .8.2.1 editCategoryContent

OPEN FOR BUSINESS OFBiz.org

Welcome THE ADMINISTRATOR!
2005-09-23 14:33:06.044

English (United States) | Set

Accounting | Catalog | Content | Example | Facility | Manufacturing | Marketing | Order | Party | Shark | WebTools | WorkEffort

Catalog Manager Application

Main | Features | Promos | PriceRules | Stores | Thesaurus | Reviews | Configurations | Logout

**Search Products** []

**Browse Catalogs** []

**Browse Categories** _

Choose Top Category
- Featured Products [PROMOTIONS]

**Products from this category** _

Gift Card Activation
GC-001
Gift Card Reload
GC-002
Round Gizmo
GZ-2644
Configurable PC
PC001
Tiny Chrome Widget
WG-5569
Giant Widget
WG-9943

Category | Content | Rollup | Products | Catalogs | Features | Parties | Attributes

## Content For: Featured Products [ID:PROMOTIONS]

[New Category] [Create Product in Category] [Search in Category] [Category Page]

| Content | Type | From | Thru | Purchase From | Purchase Thru | Use Count | Use Days | | |
|---|---|---|---|---|---|---|---|---|---|
| Fall for Fun! [10000] | Description | 2005-09-23 14:32:31.185 | N/A | 2005-10-01 08:00:00.000 | 2005-10-29 23:59:59.999 | 3 | 30 | [Delete] | [Edit Content 10000] |
| Fall for Fun! [10000] | Description | 2005-10-01 08:00:00.000 | 2005-10-29 23:59:59.999 | N/A | N/A | N/A | 30 | [Delete] | [Edit Content 10000] |

### Create New Category Content

Description

Use Days Limit

Submit Query

### Add Content to Category

Content Id

Description

From Date

Thru Date

Purchase From Date

Purchase Thru Date

Use Count Limit

Use Days Limit

Submit Query

### Override Simple Fields

Product Category Type: Catalog

Description: Featured Products

Long Description

Detail Screen
Defaults to "categorydetail", for screens in other files use something like: "component://ecommerce/widget/CatalogScreens.xml#categorydetail"

Update



Add or edit Content to the Category from this screen. [Edit Content ...] takes you to Content Manager.

## .8.2.2 link buttons

[New Category] [Create Product in Category] [Search in Category] [Category Page] [Delete] [Edit Content #] [Submit Query] [Update] [Category] [Content] [Rollup] [Products] [Catalogs] [Features] [Parties]

## .8.2.3 Table of existing content

### .8.2.3.1 Content

Click on the Name and ID to be taken to the EditCategoryContentContent screen where you can make changes or read the content.

### .8.2.3.2 Type

What type of content is this? Description, Long Description, Caption, Side-Bar, etc.

### .8.2.3.3 From

The date and time of creation or of effectivity.

### .8.2.3.4 Thru

When does the content expire or exceed its effectivity?

### .8.2.3.5 Purchase From

Applies to the purchase of product from this date and time.

### .8.2.3.6 Purchase Thru

May not apply to the purchase of products after this date and time.

### .8.2.3.7 Use Count

How many times a customer may use this promotion.

### .8.2.3.8 Use Days

How many days the promotion will be usable.

### .8.2.3.9 Note on Edit Content link

If you click on the [Edit Content ...] link to the right of the row, you will be editing the content under the Content Manager with greater options available to edit and refine your content.

## .8.2.4 Create New Category Content

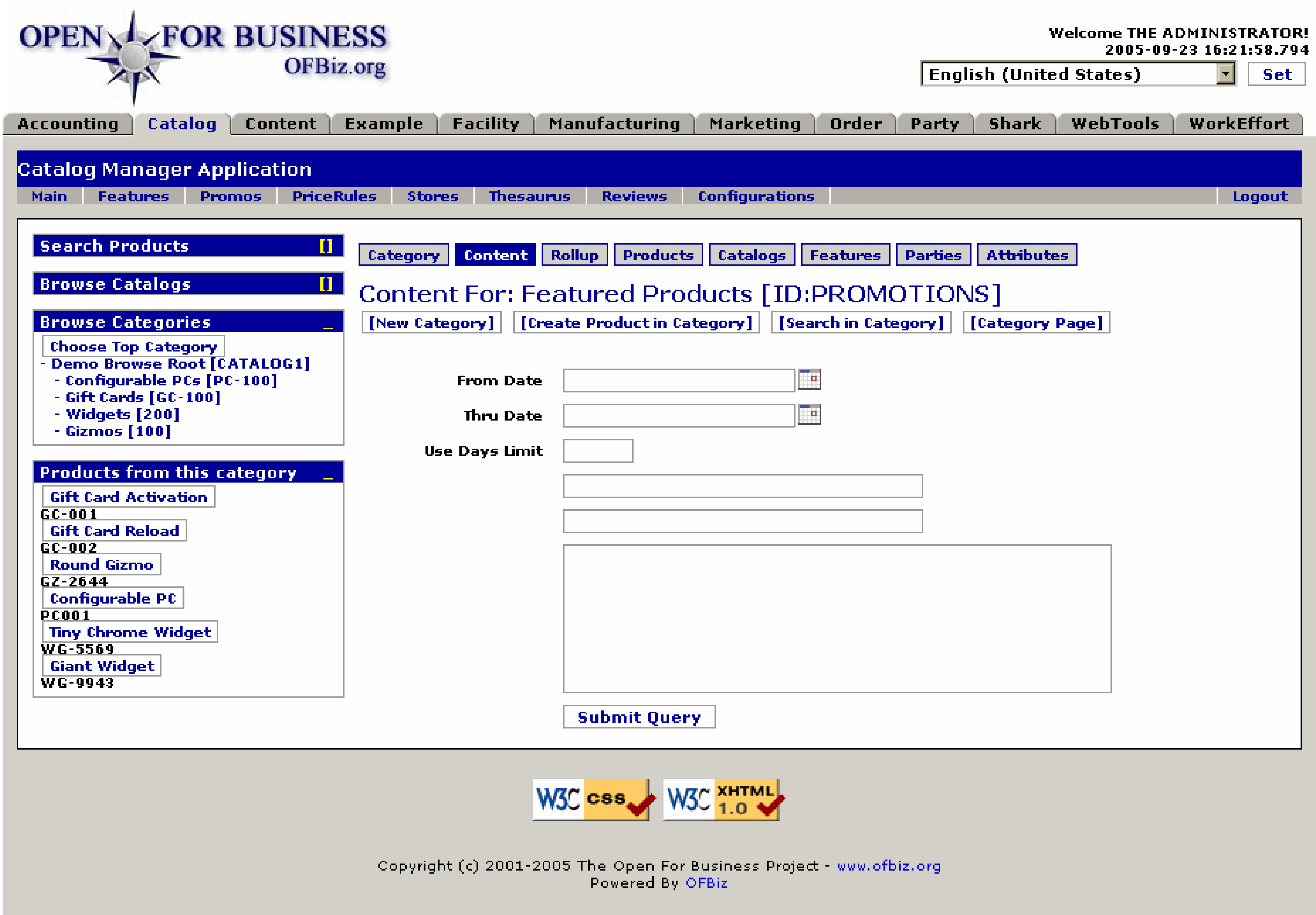
### .8.2.4.1 Content Type ID (drop-down box)

Assign a Content Type ID from the drop-down box.

### .8.2.4.2 Use Days Limit

How many days is the promotion to be effective?

### .8.2.4.3 prepareAddContentToCategory




When you click on the [Submit Query] link under Create New Category Content, this screen appears.

## .8.2.5 Add Content to Category (tool)

### .8.2.5.1 Content ID

What the Content will be known as.

### .8.2.5.2 Content Type ID (drop-down box)

Select a type from the drop-down box.

### .8.2.5.3 From Date (popup calendar)

Either accept the default (now at creation) by entering nothing, or identify the start of the effectivity.

### .8.2.5.4 Thru Date (popup calendar)

With nothing entered, the Thru Date will appear as 'N/A' but if there is a termination or expiration date, enter it here.

### .8.2.5.5 Purchase From Date (popup calendar)

Campaign dates may differ from the date of a sale. Enter here the date from which the promotion will apply to the sale of the product.

### .8.2.5.6 Purchase Thru Date (popup calendar)

When is the promotional period finished for the purchaser?

### .8.2.5.7 Use Count Limit

How many times can a customer apply this promotion for his own purchases?

### .8.2.5.8 Use Days Limit

How many sales days is the promotion limited to?

## .8.2.6 Override Simple Fields

### .8.2.6.1 Product Category Type (drop-down box)

Select the type of Product Category from the drop-down box.

### .8.2.6.2 Description

This line has to be short.

### .8.2.6.3 Long Description

Give the long version here.

### .8.2.6.4 Detail Screen

Defaults to 'categorydetail'; for screens in other files use something like: 'component://ecommerce/widget/CatalogScreens.xml# categorydetail'

## .8.2.7 Edit Category Content

There are two levels of editing available: High Level and Content Level.In the left-hand column labeled 'Content' you can click on the Name of the Content to be taken to the high-level screen shown immediately below. This is for editing dates, labels and descriptions.If you click on the far right-hand column where only the content ID is given, you are taken into the Content Manager for this particular content. There you will develop all of the aspects of the content. The screen is shown below; go to the Content Manager for more complete discussion of Content.

## .8.2.7.1 EditCategoryContentContent


Click on the Name in the Content column to bring up this high-level edit screen.

## .8.2.7.2 link buttons

[Content Page] [Submit Query] [New Category] [Create Product in Category] [Search in Category] [Category Page] [Category] [Content] [Rollup] [Products] [Catalogs] [Features] [Parties] [Attributes]

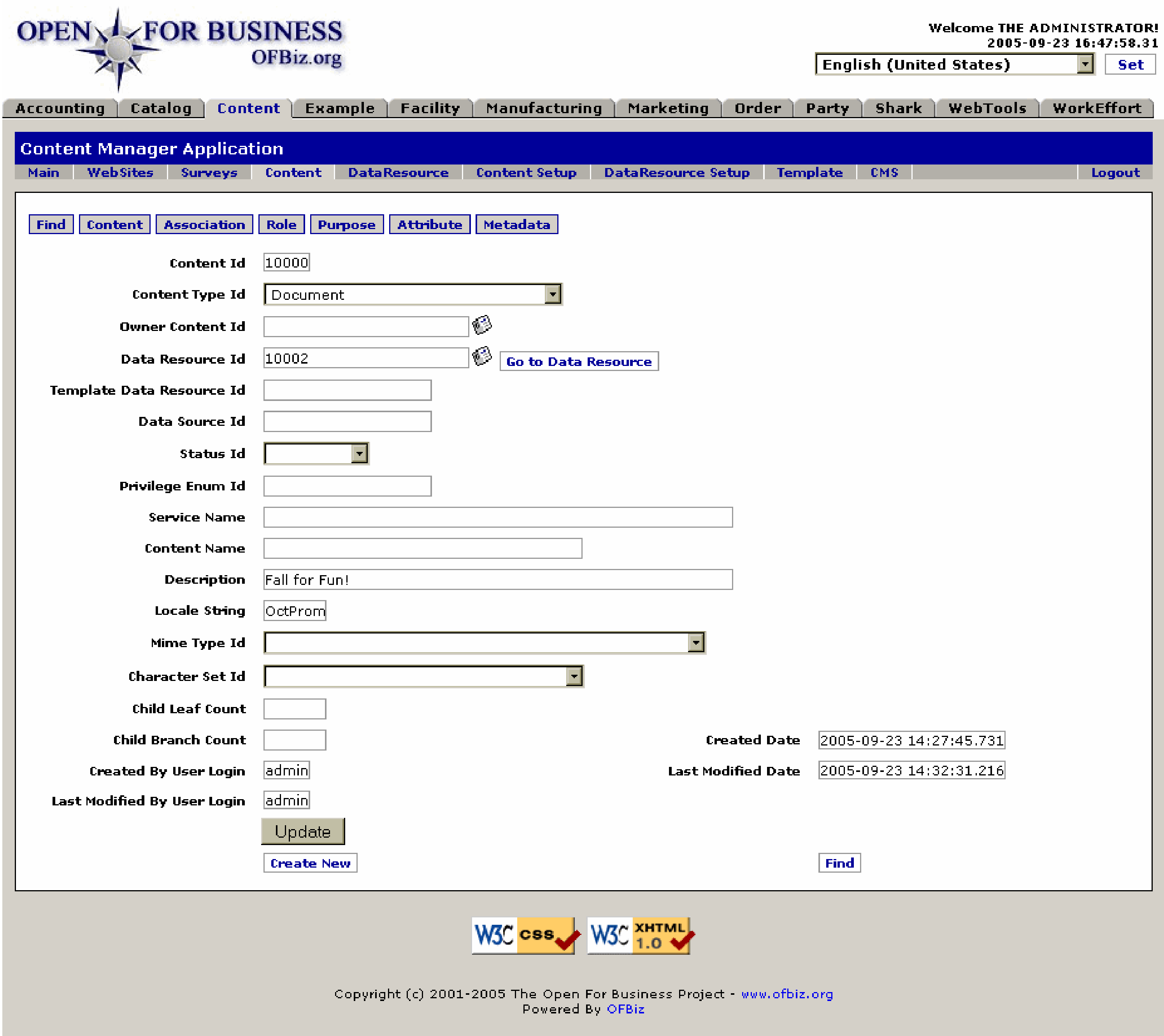
## .8.2.7.3 Discussion

The fields have already been discussed several times.If you click on the [Content Page] link, you will open this Content within the Content Manager in another browser. There you have many other options to work with in developing your content.

### .8.2.7.4 Data fields

Unlabeled fields for labels and descriptions.

## .8.2.8 EditContent

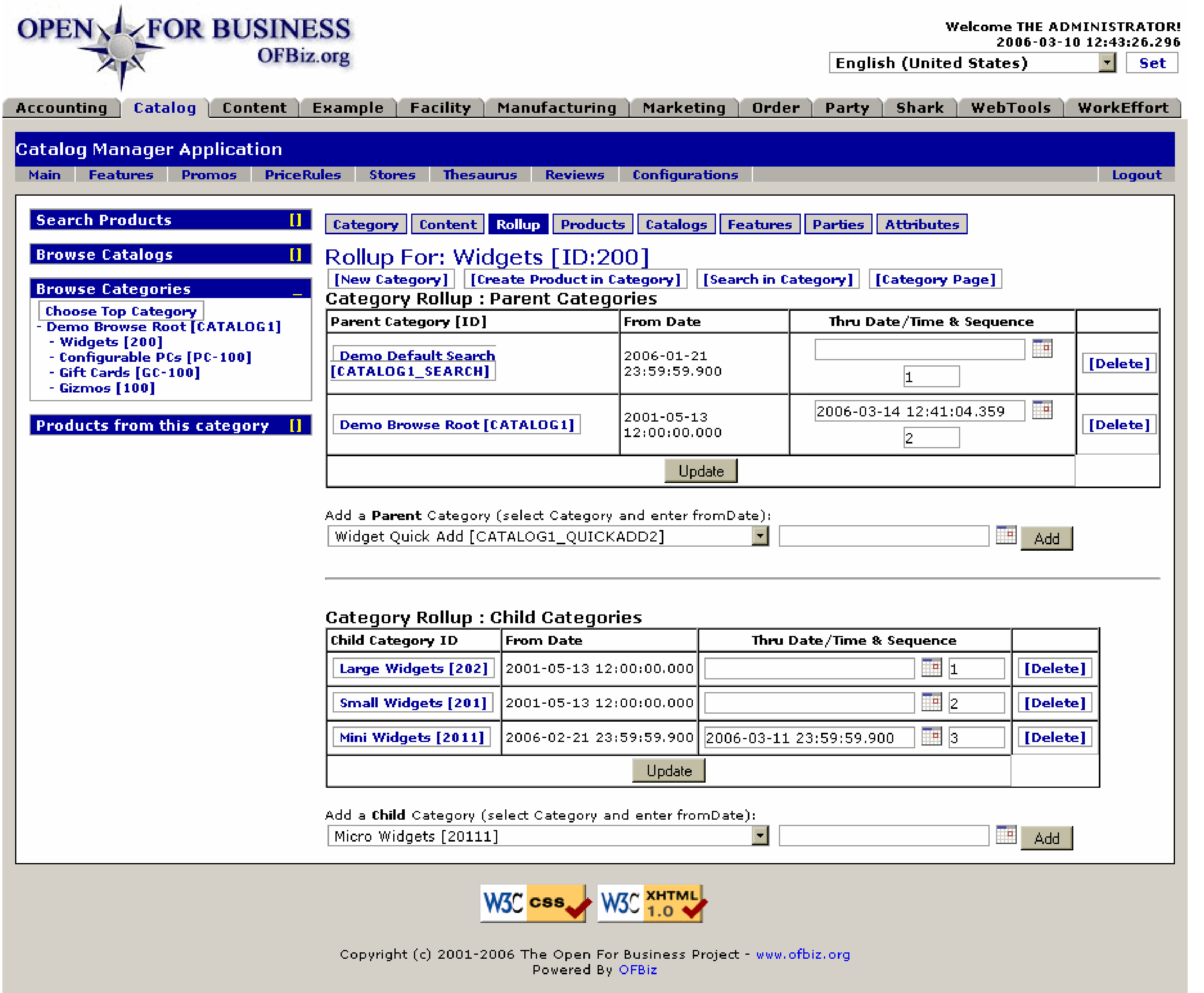



Opening screen for creating/editing Content; see the Content Manager for details.

## .8.3 Rollup

This screen is used to allocate the location of the category within the navigation. The category will appear in 'Parent' categories and will have 'child' categories in its navigation tree.

### .8.3.1 EditCategoryRollup




Rollup of category relationships: Parent to Child; Child to Parent. Associate, edit and schedule either of these here.

## .8.3.2 link buttons

[New Category] [Create Product in Category] [Search in Category] [Category Page] [Update] [Delete] [Add] [Category] [Content] [Rollup] [Products] [Catalogs] [Features] [Parties] [Attributes]

## .8.3.3 Category Rollup: Parent Categories

### .8.3.3.1 Parent Category ID

You can assign a Parent Category into this column using the Tool to Add a Parent Category, discussed below.

This link to the category update screen takes you to EditCategory.

### .8.3.3.2 From Date

Date the assignment to the Parent was effective.

### .8.3.3.3 Thru Date / Time (popup calendar)

Date the relationship will expire. Use the popup calendar to edit this date.

### .8.3.3.4 Sequence

If more than one, this number will indicate sequencing.

### .8.3.3.5 Tool to Add a Parent Category

#### .8.3.3.5.1 Select category (drop-down box)

This is the selection of the Parent category for the established category you are working with.NOTE: Just because a Category appears in the drop-down list does not a logical choice for a Parent. Consider true relationships when making assignments.

#### .8.3.3.5.2 From Date (popup calendar)

The default date will be the time when the assignment is made. If you wish, enter another date.

## .8.3.4 Category Rollup: Child Categories

Provides a link to the category update screen called EditCategory.

### .8.3.4.1 Child Category ID

You can insert a Child Category to this column using the Tool to Add a Child Category, discussed below.

### .8.3.4.2 From Date

The date when the relationship was created or made effective.

### .8.3.4.3 Thru Date / Time (popup calendar)

Date the relationship will expire, if any. Use the popup calendar to enter.

### .8.3.4.4 Sequence

If more than one, this number indicates the sequencing of relationships.

### .8.3.4.5 Tool to Add a Child Category

#### .8.3.4.5.1 Select category (drop-down box)

Confirm that the Category you want to be the Parent is the active Category on the screen before you select a Child from the drop-down list of Categories.

#### .8.3.4.5.2 From Date (popup calendar)

The current date and time are entered by default. Select a different date and time if you need to.

## .8.4 Products

This contains the list of products that will be displayed in the category. Other products may be displayed in sub categories but the products that are to appear on the page will go here. Products can appear more than once in categories.

## .8.4.1 EditCategoryProducts


Here you control Products currently featured in this Category; note listing of current Child categories in the LH panel.

## .8.4.2 link buttons

[New Category] [Create Product in Category] [Search in Category] [Category Page] [Active and Inactive] [Update] [Delete] [Add] [Copy] [Expire All] [Remove Expired] [Category] [Content] [Rollup] [Products] [Catalogs] [Features] [Parties] [Attributes]

## .8.4.3 Table of Products for this Category

### .8.4.3.1 Product Name ID

Clicking on the Product Name ID takes you to the Catalog >> Product >> edit product page (EditProduct).

### .8.4.3.2 From Date and Time

Date and Time when this item was included in this Category.

### .8.4.3.3 Thru Date/Time (popup calendar)

If needed, Date and Time when the presence of this Item in this Category will expire. Use the popup calendar to edit this field.

### .8.4.3.4 Sequence

Optional sequence number for rotation of items through a sequence,

### .8.4.3.5 Quantity

If there is a limitation for this Promotion or a stock limitation, the Quantity available will be shown here.

## .8.4.4 Add Product Category Member

### .8.4.4.1 Product ID

Use the popup search tool to locate if not sure of the ID.

### .8.4.4.2 From Date (popup calendar)

Will default to the current date and time. Enter a different date if the effective date is not the same as the current.

## .8.4.5 Copy Product Category Members to Another Category

### .8.4.5.1 Target Product Category (drop-down box)

If you want the products in this category to also be part of another established category, select that Product Category from this drop-down box.

### .8.4.5.2 Optional Filter with Date (popup calendar)

If you have a filter system to use, enter the ID here along with the date you wish it to be effective from.

### .8.4.5.3 Include Sub-Categories? (Y/N)

Some categories are also parent categories. Do you want the assignment of these products to also be included in the target Category's sub-categories? If Yes, select Y, else N.

## .8.4.6 Expire All Product Members

If you click on this Link, all the Products currently assigned will be Expired, clearing out the current list. Use with care!!

### .8.4.6.1 Optional Expiration Date (popup calendar)

If you do want all the Product Members of this Category to expire but not yet, indicate the future date upon which that should occur. Note that you can use the popup calendar and then manually adjust the time entered.

## .8.4.7 Remove Expired Product Members

Expired does not mean removed. To remove the expired members, click on the link.

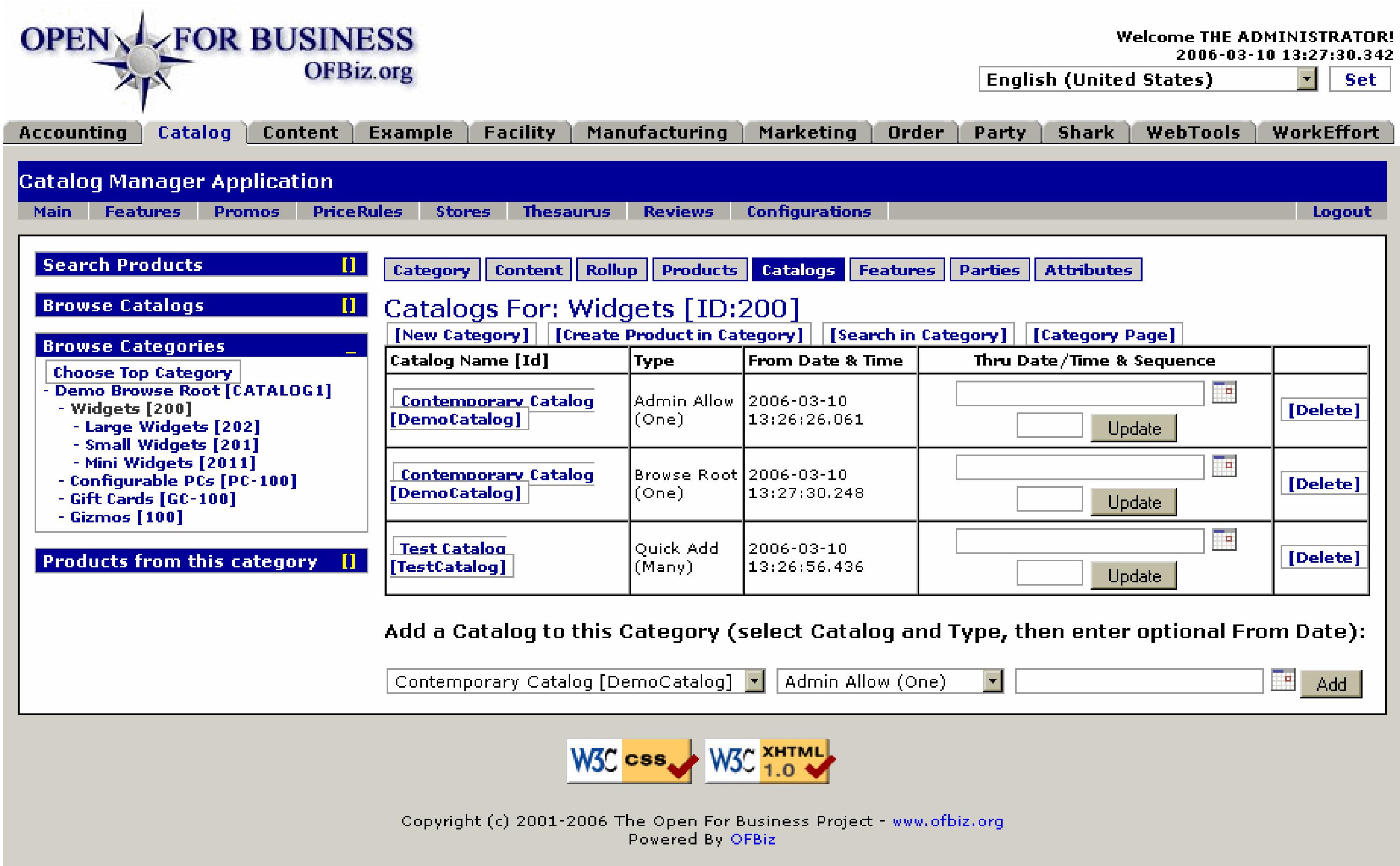
### .8.4.7.1 Optional Expired Before Date (popup calendar)

Perhaps you want to remove those Products which expired the first of the month, but retain those which expired later. Maybe you need to retain them as expired so that Sales of those items can be confirmed at the promotional price. Use this popup calendar to specify the cutoff point: those which expired before this date will be removed, but any which expired after the selected Date and Time will remain.

## .8.5 Catalogs

As a minimum you will need to add a browse root and a promotions category. The browse root forms the 'top level' of the site and this is what the other categories that you create will 'hang' off. The promotions category is for special offers and is the front page of a site by default. There are other categories available which can be used for specialist functions like Search, etc. So the catalog is assigned a category, categories are assigned to a catalog with a 'type' of assignment, ie , browse root, promotions, etc. In addition you will want to add your own categories to represent different 'Departments' in the store, 'grouping' of concepts, etc.

### .8.5.1 EditCategoryProdCatalogs




Catalogs and the Type of catalog usage are added, scheduled, or deleted from this screen.

### .8.5.2 link buttons

[New Category] [Create Product in Category] [Search in Category] [Category Page] [Update] [Delete] [Add][Category] [Content] [Rollup] [Products] [Catalogs] [Features] [Parties] [Attributes]

## .8.5.3 Table of Catalogs

### .8.5.3.1 Catalog Name ID

Clicking on the ID takes you to the EditProdCatalog screen.

### .8.5.3.2 Type

This is the Type of relationship this Catalog has with the selected Product or Category.

### .8.5.3.3 From Date and Time

When the association was created or made active.

### .8.5.3.4 Thru Date / Time (popup calendar)

When (if) the association will expire. Use the popup calendar to enter or change the Date and Time.

### .8.5.3.5 Sequence

Optional sequencing number.

## .8.5.4 Add Catalog to Product Category

### .8.5.4.1 Catalog (drop-down box)

Select from the drop-down box.

### .8.5.4.2 Type (drop-down box)

Type of relationship between the catalog and this category.

### .8.5.4.3 From Date (popup calendar)

Optional date if to be different than the current date which will default.

## .8.6 Features

### .8.6.1 EditCategoryFeatureCats

Associate Feature Groups and Feature Categories with the selected Category. Also may delete or schedule here.

### .8.6.2 link buttons

[New Category] [Create Product in Category] [Search in Category] [Category Page] [Attach Features to Category from Products] [Add] [Update] [Delete]<B> [Category] [Content] [Rollup] [Products] [Catalogs] [Features] [Parties] [Attributes]

## .8.6.3 Table of Feature Groups

### .8.6.3.1 Feature Group

Click on this and you are taken to the Catalog Manager > Features tab > Feature Groups sub-tab to edit the Feature Group.

### .8.6.3.2 From Date and Time

Date and time this Feature Group was attached.

### .8.6.3.3 Thru Date and Time (popup calendar)

When the association of this Feature Group with this Catalog will expire. Use the popup calendar to insert or change the date and time.

## .8.6.4 Apply Feature Group to Product Category

### .8.6.4.1 Feature Groups (drop-down box)

Select a Feature Group from the drop-down box, select a date and time for it to be effective (defaults to now if nothing entered), and click on the [Add] link.This method will attach the Feature Groups one at a time. To do all of the Groups at the same time, use the [Attach Features to Category from Products] link above the table.

### .8.6.4.2 From Date and Time (popup calendar)

To enter an effectivity date and time other than the present.

## .8.6.5 Table of Feature Categories

### .8.6.5.1 Feature Category

Click on the Feature Category ID and you are taken to the Catalog Manager > Features tab > Feature Category screen to view and edit this Category.

### .8.6.5.2 From Date and Time

When the Feature Category was associated or became effective.

### .8.6.5.3 Thru Date and Time (popup calendar)

Expiration date and time for this association. Use the popup calendar to enter or change the expiration.

## .8.6.6 Apply Feature Category to Product Category

### .8.6.6.1 Feature Category (drop-down box)

Select a Feature Category from the drop-down box.

### .8.6.6.2 From Date (popup calendar)

Enter a date and time for future effectivity. Leave blank and it will populate for the present time when the Feature Category is added.

## .8.7 Parties

### .8.7.1 EditCategoryParties


Associate suppliers, administrators, sales staff, specialists, etc. (by PartyID) with this Category as needed.

### .8.7.2 link buttons

[New Category] [Create Product in Category] [Search in Category] [Category Page] [Update] [Delete] [Add][Category] [Content] [Rollup] [Products] [Catalogs] [Features] [Parties] [Attributes]

## .8.7.3 Table of Party IDs

This table contains a listing of those Parties associated with the Category. Use the Party Manager to specify the Party ID or to create any parties which should be associated but which have not yet been created.

### .8.7.3.1 Party ID

Click on the Party ID and you are taken to the Party manager.

### .8.7.3.2 Role

What role does this Party play?

### .8.7.3.3 From Date and Time

Date and time of the assignment.

### .8.7.3.4 Thru Date and Time (popup calendar)

If the role is to expire, enter the date and time with the popup calendar.

## .8.7.4 Associate Party to Category

### .8.7.4.1 Party ID

There is no drop-down or popup search tool at this time. Enter the correct Party ID for this to function.

### .8.7.4.2 Type (drop-down box)

Select from the drop-down box.

### .8.7.4.3 From Date (popup calendar)

(Optional) Enter the date when the assignment will become effective. If left blank, defaults to now.

## .8.8 Attributes

### .8.8.1 EditCategoryAttributes


Assign and edit the attributes for this Category of products with this screen.

### .8.8.2 link buttons

[New Category] [Create Product in Category] [Search in Category] [Category Page] [Update] [Delete] [Create][Category] [Content] [Rollup] [Products] [Catalogs] [Features] [Parties] [Attributes]

### .8.8.3 Tool to create attributes

#### .8.8.3.1 Product Category ID

Cannot be changed. Is given here to confirm that this is the Product Category to which you wish to assign attributes.

#### .8.8.3.2 Attr Name

Create your own name for the attribute and enter it here.

#### .8.8.3.3 Attr Value

Enter words to describe this Attribute in relation to the Product Category.

### .8.8.4 Table of Attributes

#### .8.8.4.1 Attr Name

The name you gave to this Attribute.

#### .8.8.4.2 Attr Value

How the Attribute describes the Product Category.

# .09 **Product** - new Product or edit

## .9.1 Discussion

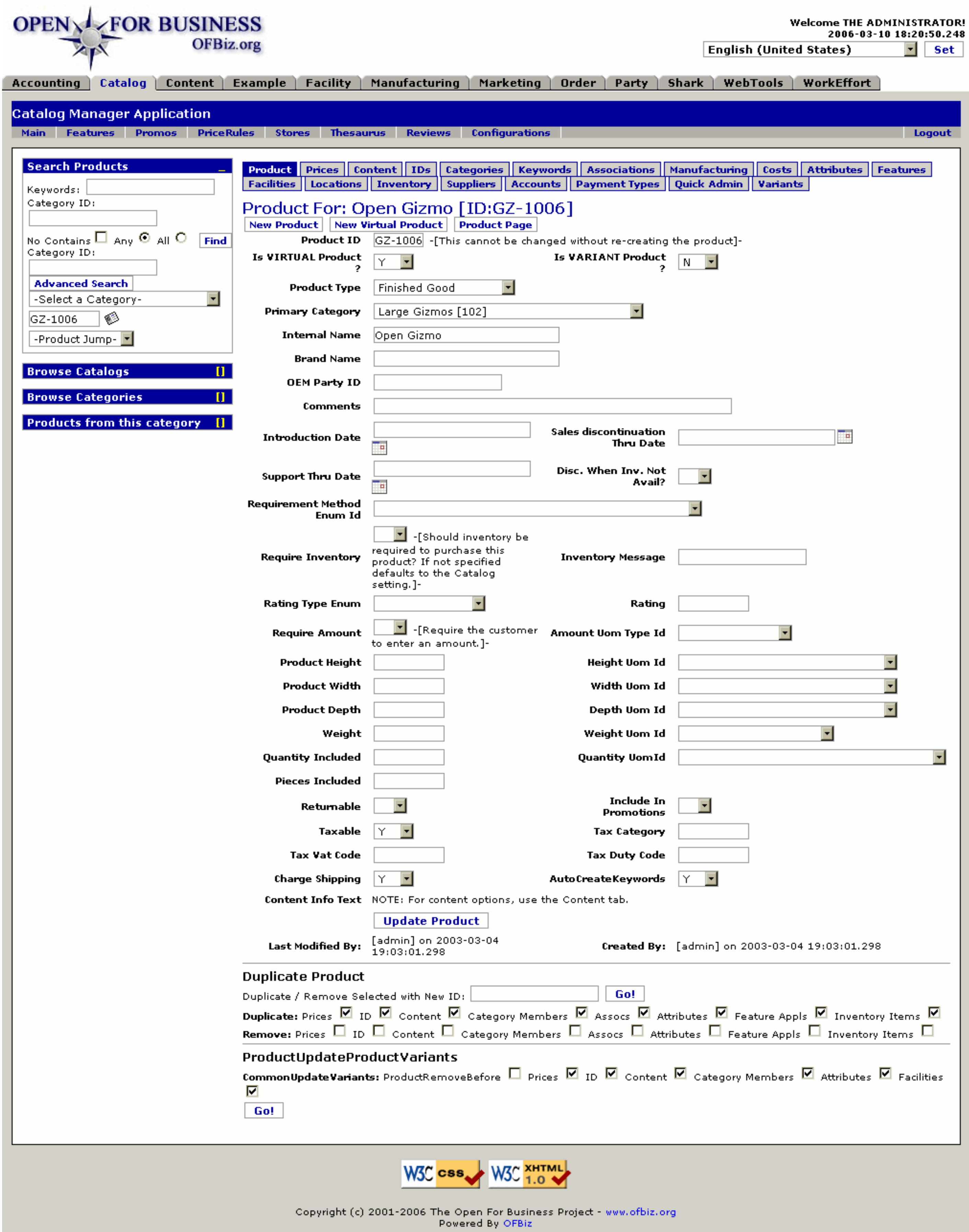
This is the first tab in the product catalog editing process. Click on [New Product] to create a new item. [Product Page] jumps you into the e-commerce application to the specific page for this product. These actions are presented on each of the EditProduct screens.

The tabs following Product (Prices, Content, IDs, etc.) will be seen when you select to Edit an existing product or after pressing Update when creating a new product. Not all of these tabs will appear all of the time. For example, Variants will only appear when you are working with a Virtual product. Configurations will only appear with a configurable product.

Once the product has been updated you will need to visit both the 'Content' tab (to update images or update the freemarker template) and the 'Categories' tab where you will specify the categories that you want the product to appear in. In order to make it appear in the category then it must be added in the 'Categories' tab at the top.

## .9.2 Product

### .9.2.1 EditProduct




Click on [Update Product] after an Edit or creating a New Product; the Product is administered here for the Catalog.

## .9.2.2 link buttons

[Update Product] [Go!] [New Product] [New Virtual Product] [Product Page] [Product] [Prices] [Content] [IDs][Categories] [Keywords] [Associations] [Manufacturing] [Costs] [Attributes] [Features] [Facilities] [Locations] [Inventory] [Suppliers] [Accounts] [Payment Types] [Quick Admin] [Variants] [Configurations]

## .9.2.3 Product ID

This will be the method for identifying the product used by your company. Our standard way of identifying products is to use a mnemonic to identify the supplier and then their code is added to the end of this to create a unique ID.

Variants generally have a hyphenated extension at the end: GZ-1006-1, -2, etc. This ID cannot be changed without re-creating the product.

## .9.2.4 Is VIRTUAL Product? (Y/N)

These are for items that may be available in a variety of sizes, colors, etc., Ordinary products will be set to NO. A Virtual product could be 321 Shirt; by specifying size and color during the ordering process the customer would arrive at his actual product of a Blue Shirt, type 321, size XL Male., for example.

### .9.2.4.1 Virtual products with Variants

If you have products that come in different sizes, colors, etc., you will need to use the 'virtual product' and create 'variants' based on this. To do this you create a base or 'virtual' product for say, a given type of shirt. Then for each color/size combination you create a variant. The reason for this is, when you track inventory, what you really sell is not a 'shirt' but rather a 'large, green shirt' So when in the 'Product' screen the 'Virtual product' only gets set to Y if this product comes in colors/sizes/etc.

## .9.2.5 Is VARIANT Product? (Y/N)

These could be the various varieties of the virtual product currently in stock. <P/> See topic Advanced Products, below, for more information.

## .9.2.6 Product Type (drop-down box)

Needed for searches and appropriate handling by the system. Use the drop-down box to select. Types could include the following:

- —
- Configurable Good

- Digital Good
- Finished Good
- Digital/Finished Good
- Fixed Asset Usage
- Good
- Raw Material
- Service
- Subassembly
- Work in Process

## .9.2.7 Primary Category (drop-down box)

Which Category will be the primary identifier of this type of product? This is one of the categories that have been created. You may also want to assign it to the Promotions category in due course if the product is to appear on the front page.

## .9.2.8 Internal Name

Name as known within the company.

## .9.2.9 Brand Name

Name by which it is marketed to customers; the holding company or principal company brand.

## .9.2.10 OEM Party ID

If product is not completely made by you, the Party ID of the source for the product (Other Equipment Manufacturer) is entered here.

## .9.2.11 Comments

These are internal comments, not for public showing.

## .9.2.12 Introduction Date (popup calendar)

The first date that the product will appear in the system.

## .9.2.13 Sales discontinuation Thru Date (popup calendar)

The last day that the product will be available on the system.

### .9.2.14 Support Thru Date (popup calendar)

How long the product might be supported after having been sold; applies to Warranty, Returns, Customer Service questions, etc.

### .9.2.15 Disc. When Inv. Not Avail? (Y/N)

If checked Yes, can offer the customer a discount for waiting until inventory is available for shipping.

### .9.2.16 Requirement Method Enum ID

Refers to warehouse stocking level triggers. The drop-down box might contain: No Requirement Created Automatic for Every Sales OrderWhen ATP Reaches Minimum Stock for Product-FacilityWhen QOH Reaches Minimum Stock for Product-Facility

### .9.2.17 Require Inventory? (Y/N)

'Should inventory be required to purchase this product? If not specified defaults to the Catalog setting.'We can override the catalog defaults for the Inventory setting using the 'Require Inventory' tab. This will override the catalog field (where this is also specified at a higher level) and, where this is set to 'yes' this will mean the product is not displayed when there is no stock available.

### .9.2.18 Inventory Message

This is the place where we set the message 'This product is out of stock and will require x days to order' This is also set from the Inventory Items tab off the 'Facility' section described in 'Inventory'.

### .9.2.19 Rating Type Enum (drop-down box)

Rating Type is selected from the drop-down box. Enum could be: Min RatingMax RatingRating Override

### .9.2.20 Rating

State in relation to the Rating Type Enum (Max Rating, Min Rating, Rating Override, etc.).

### .9.2.21 Require Amount (Y/N)

'Require the Customer to enter an amount.' Also specify the Amount UOM Type if other than 'Each.'

### .9.2.22 Amount Uom Type ID (drop-down box)

Select from the drop-down box. Enter an item if the Amount is other than 'Each.'Choices include Area, Currency, Dry Volume, Energy, Length, Liquid Volume, Temperature, Weight, etc.

### .9.2.23 Product Height

When purchasing product that needs to fit within a certain space, dimensions are appreciated by the customer. Enter the item's Height here and specify the UOM, next.

### .9.2.24 Height Uom ID (drop-down box)

From the drop-down box, select the Unit of Measurement used in determing the Height.

### .9.2.25 Product Width

When purchasing product that needs to fit within a certain space, dimensions are appreciated by the customer. Enter the item's Width here and specify the UOM, next.

### .9.2.26 Width Uom ID (drop-down box)

From the drop-down box, select the Unit of Measurement used in determing the Width.

### .9.2.27 Product Depth

When purchasing product that needs to fit within a certain space, dimensions are appreciated by the customer. Enter the item's Depth (front to rear measurement) here and specify the UOM, next.

### .9.2.28 Depth Uom ID (drop-down box)

From the drop-down box, select the Unit of Measurement used in determing the Depth (front to rear measurement).

### .9.2.29 Weight

When purchasing product that needs to be shipped or hefted about, knowing its weight is appreciated by the customer. Enter the item's Weight here and specify the UOM, next.

## .9.2.30 Weight Uom ID (drop-down box)

Specifies the weight unit of measure. For example kilogram or pound. It is not a required field and can be omitted. It can be used for calculating shipping when this is based on weight.

## .9.2.31 Quantity Included

Any given product ID could include any number of specific identical items. For example, if this product were cans of baby formula, packaged to ship 4 in a container, the unit here would be 4.

## .9.2.32 Quantity Uom ID (drop-down box)

If the Quantity is Each, you will leave this blank. This drop-down box specifies more esoteric units of measure such as Watt, Liter, Ounce, Yard, Mole, Ansgstrom, etc.

## .9.2.33 Pieces Included

If the complete package includes (for example) 7 different pieces which fit together or collectively comprise the Product, indicate 7 as the number of Pieces. This is different from Quantity Included which refers to the number of identical Pieces comprising an Item Product ID for shipping and handling purposes.

## .9.2.34 Returnable? (Y/N)

If not satisfied with this Product, will the customer be allowed to return it?

## .9.2.35 Include In Promotions? (Y/N)

Would this Product be interesting enough to describe it in Promotions?

## .9.2.36 Taxable? (Y/N)

This requires an evaluation of the item under the tax law. Is it subject to taxes at the time of transfer or is it not?

## .9.2.37 Tax Category

There are many types of tax Categories: Luxury Tax, Sales Tax, Property Tax, Use Tax, Tobacco Tax, Fuel Tax, Transportation Tax, Tourist Tax, etc. If the Product (or Service) is subject to any of these, specify here.

## .9.2.38 Tax Vat Code

Which Value Added Tax code does this fit under?

## .9.2.39 Tax Duty Code

A separate table needs exist which maintains the tax rates for separate geographical/governmental areas. The tax category would pull out the appropriate tax rating for that area.

## .9.2.40 Charge Shipping? (Y/N)

Data products, such as e-books or programs downloaded across the internet, could not generate shipping charges.

Promotional pricing might include 'free shipping' which would override this setting. If you intend to charge for the shipping expense, however, this should be set to Yes.

## .9.2.41 AutoCreate Keywords? (Y/N)

If this is selected then the contents of the long description will be used to populate the products keywords. This means that when someone searches on any of these keywords then the product will be displayed. This functionality is also available in the 'Keywords' tab which is available after the product has been added using the 'Update' button.

## .9.2.42 Content Info Text

Appears here for informational purposes only. 'NOTE: For content options, use the Content tab.'

## .9.2.43 Last Modified By

Which Party last made changes to the content on this screen and when did they do that?

## .9.2.44 Created By

Which Party initiated this Product sheet and when did they do it?

## .9.2.45 Duplicate Product

Duplicate / Remove Selected With New ID. Enter the New ID, check the appropriate boxes below, then click on the [Go!] link. If you want these aspects of the existing Product to be carried forward into the new Product, check them after the 'Duplicate:'

label. If you want the Product to be duplicated without carrying them forward, check the appropriate boxes after the 'Remove:' label.

## .9.2.46 ProductUpdateProductVariants

Enter checks in the boxes to be included in the Variants, then press the link [Go!].CommonUpdateVariants:

ProductRemoveBeforePricesIDContentCategory MembersAttributesFacilities

## .9.2.47 Advanced Products

### .9.2.47.1 Introduction

#### .9.2.47.1.1 Feature Categories

The next stage is to add features which is what you use for colors and sizes. To do this the 'FeatureCats' section is used. We start by creating a feature category, then add features to it. The ID code isn't needed to be unique by default and you don't have to use it.

### .9.2.47.2 More processes

#### .9.2.47.2.1 Apply features

Apply the features to the product, i.e., what colors does this shirt come in?

#### .9.2.47.2.2 Create variants

Create a variant for each combination.

#### .9.2.47.2.3 Create inventory

Create inventory for each variant.

### .9.2.47.3 Explanation

#### .9.2.47.3.1 Edit features screen

You use the 'edit features' (caution: this screen can be confusing and it is worth spending some time familiarising yourself with this) screen to apply features to a product, and each application of a feature has a given type.

For a base or 'virtual' product, you will apply a feature as type 'Selectable'. This gives the end user the ability to choose between selections, i.e., a drop down will appear for each selectable feature type, listing all selectable features of each type.

### .9.2.47.3.2 Examples

For example, if we apply features of the Color feature type that means there will be one drop-down labeled 'Color'. If we applied features of feature type 'Size' there would also be a drop down for Size.

This screen is a bit awkward because it takes you back to the other screen each time you apply a feature.

Once we've done the features we need to do the variant. This part is easier. In the Quick Add Variants screen it will automatically create our variant products so you put your product id that you want it to have and click create. So if we had 3 sizes too, there would be a total of 6 variants... 2 colors * 3 sizes = 6 combinations.

### .9.2.47.3.3 Virtual N, Variant Y

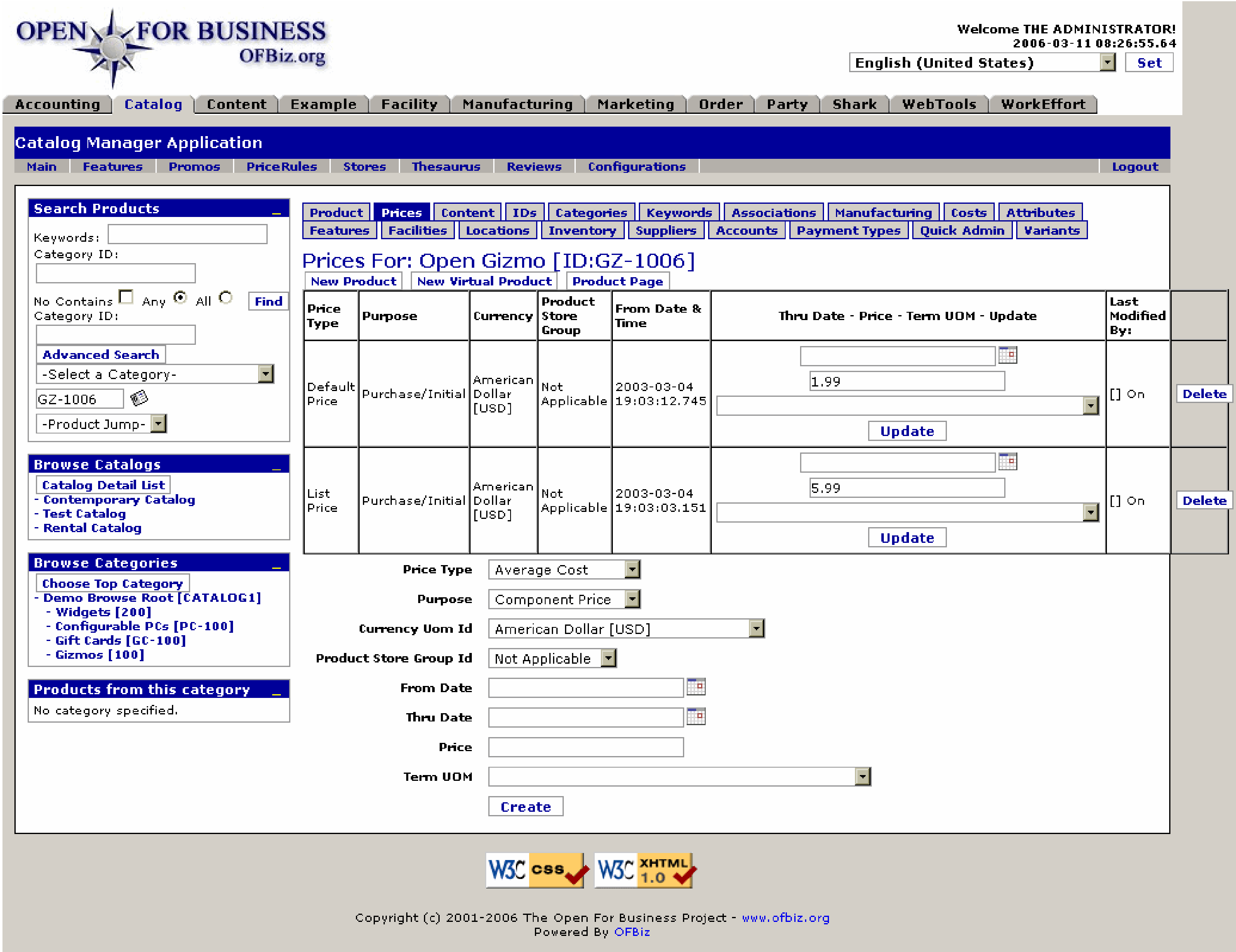
This is really just a product but we see it has virtual set to N and variant set to Y. So it has now generated a finished good with the characteristics we specified. So when we look at the features, we see there is one feature applied, but now the application type is 'Standard.' Before that it was selectable on the base product.

### .9.2.47.3.4 Sell Variant, not Product

Features on a variant product denote what 'kind' of test shirt it is as in, a red one or a blue one. NOTE: You must add inventory to the variant and not the base product. This is because you are selling the variant and not the base product.

## .9.3 Prices

### .9.3.1 EditProductPrices




At this Price screen you can change a Price, create a new Price, or delete an obsolete one. Many OFBiz processes are based upon these prices.

### .9.3.2 link buttons

[Update] [Create] [Delete] [New Product] [New Virtual Product] [Product Page] [Product] [Prices] [Content] [IDs] [Categories] [Keywords] [Associations] [Manufacturing] [Costs] [Attributes] [Features] [Facilities] [Locations] [Inventory] [Suppliers] [Accounts] [Payment Types] [Quick Admin] [Variants] [Configurations]

## .9.3.3 General discussion of prices

### .9.3.3.1 Required prices

There are several different types of prices. The only REQUIRED ones are List Price and Default Price. So you should have a price at which it is bought and a price at which it is sold. List price can be used as Suggested Retail price and Default price would be the price which you will sell it for (by default).

### .9.3.3.2 Average Cost and other prices

Average Cost would reference how much you paid for the product since you could pay different amounts for the item, depending on when you purchased, from whom you purchased or how many you purchased at the time. This field references the average amount the item cost. In the future this may be generated based on purchase orders, etc. But that will be a while. Currently I do not believe Recurring Charge and Usage Charge do anything at all. They are there for future use. That leaves max, min and promo price.

#### .9.3.3.2.1 Max price

Max price is the MOST you will ever sell this product for. When we get into Price Rules you can see that all sorts of adjustments can be made to the price, so this acts as a failsafe.

#### .9.3.3.2.2 Min price

Min price is set the same way as Max, but it makes sure you never sell the product for less then what you set. If max price is ever less then min price, min price will take priority.

### .9.3.3.3 Price Unit of Measure

There are 3 fields on the Product that are used to describe Price Unit of Measure (UOM). They are Quantity Included, Quantity Uom ID, and Pieces Included. The price of the product is for the given quantity and number of pieces.For example, a 6-pack of 12 ounce soda cans would have Quantity Included = 12, Quantity Uom ID is ounces, and Pieces Included = 6. If there is just one of something, the Pieces Included can be left blank as that implies a single piece.The Term Uom Id on the price screen has nothing to do with this. That is used only when the price purpose would require this extra information. The UOMs included there might, therefore, not make sense for all circumstances, and in most cases this field would be left empty.An example of Term Uom Id is a recurring price that is charged monthly: the Term Uom would be 'Time/Frequency: Time in Months'. Another example is a usage charge per kilobyte transferred, with the corresponding term used to further describe the price.

## .9.3.4 Table of assigned prices

### .9.3.4.1 Price Type

How the Application uses the Price is partly constrained by the term found here. The Type will be one of the following: Average CostCompetitive PriceDefault PriceList PriceMaximum Price Minimum PricePromotional PriceWholesale Price

### .9.3.4.2 Purpose

For what purpose was this price established?

### .9.3.4.3 Currency

The national currency in which the Price is expressed.

### .9.3.4.4 Product Store Group

If you have different Product Store Groups set up, the Price might vary between them. This is where the specific Product Store Group limitation would be indicated.

### .9.3.4.5 From Date and Time

When the Price was established or scheduled to be applied.

### .9.3.4.6 Thru Date (popup calendar)

If the Price will expire at a particular date and time, that is indicated here. Use the popup calendar and the [Update] link to change the Thru date for this pricing.

### .9.3.4.7 Price

The established Price can be modified here within this table. Click [Update] after any changes are made.

### .9.3.4.8 Term UOM (drop-down box)

Can change the Unit of Measure here; use the drop-down box. If UOM is 'Each' or some term not listed, do not assign a UOM.

#### .9.3.4.9 Last Modified by - On

Who changed the Price or its terms and when that change was done.

### .9.3.5 Tool to assign prices

#### .9.3.5.1 Price Type (drop-down box)

Select one of the following from the drop-down box: Average CostCompetitive PriceDefault PriceList PriceMaximum PriceMinimum PricePromotional PriceWholesale Price

#### .9.3.5.2 Purpose

For what purpose is this Price being established? Select one of the following from the drop-down box:

Component PricePurchase/InitialRecurring ChargeUsage Charge

#### .9.3.5.3 Currency Uom ID (drop-down box)

In which national Currency is the price expressed?

#### .9.3.5.4 Product Store Group ID (drop-down box)

If you have different Product Store Groups set up, the Price might vary between them. This is where the specific Product Store Group limitation would be indicated.

#### .9.3.5.5 From Date (popup calendar)

Defaults to now. When the price will not be effective until a later date and time, or if you are documenting an earlier price assignment, enter that date here.

#### .9.3.5.6 Thru Date (popup calendar)

If the Price will expire at a specific date in the future, use the popup calendar to identify that date here.

### .9.3.5.7 Price

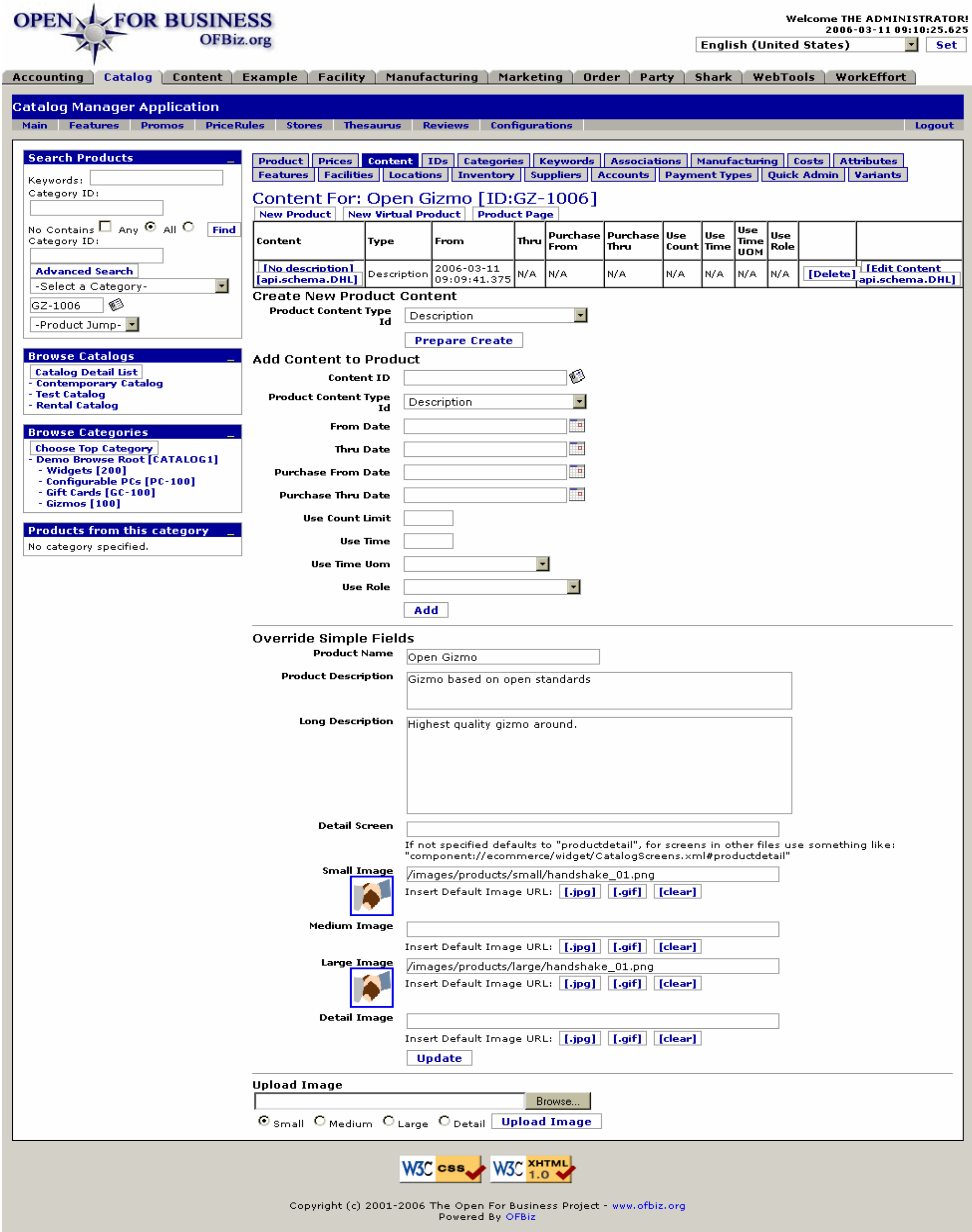
This is THE price which will be reported in its relationship with Type: List Price, Default Price, Average Cost, etc.

### .9.3.5.8 Term UOM

Price is always specified for a particular term: so much per gallon, per dozen, each, per acre, etc. If the term is obvious, such as Each, just leave this Term blank. You might need to find a specific term, however, so try to find it in the drop-down list.

## .9.4 Content

### .9.4.1 EditProductContent




Initial edit screen for catalog Content associated with this Product. [Edit Content] takes you to the Content Manager for refinements.

## .9.4.2 link buttons

[Delete] [Edit Content ...] [Prepare Create] [Add] [.jpg] [.gif] [clear] [Update] [Browse] [Upload Image] [New Product][New Virtual Product] [Product Page] [Product] [Prices] [Content] [IDs] [Categories] [Keywords] [Associations] [Manufacturing] [Costs] [Attributes] [Features] [Facilities] [Locations] [Inventory] [Suppliers] [Accounts] [Payment Types] [Quick Admin] [Variants] [Configurations]

## .9.4.3 Table of Current Content

### .9.4.3.1 Content

Gives you the Short Description and the Content ID. Click on that to go to the EditProductContentContent screen in the Catalog manager to make high-level changes. For detailed work on the Content, go to the far right column and click on the [Edit Content] link which takes you to the Content Manager with this Content.

### .9.4.3.2 Type

What kind of content is this?

### .9.4.3.3 From

What is the effective Date for the Content?

### .9.4.3.4 Thru

When does the effectivity of this Content for this Product expire?

### .9.4.3.5 Purchase From

This Content is effective for this Product for purchases from what date and time forward?

### .9.4.3.6 Purchase Thru

This Content is effective for this Product for purchases until what date and time?

### .9.4.3.7 Use Count

How many times may this item be used?

### .9.4.3.8 Use Time

For what period of time may the content be used?

### .9.4.3.9 Use Time UOM

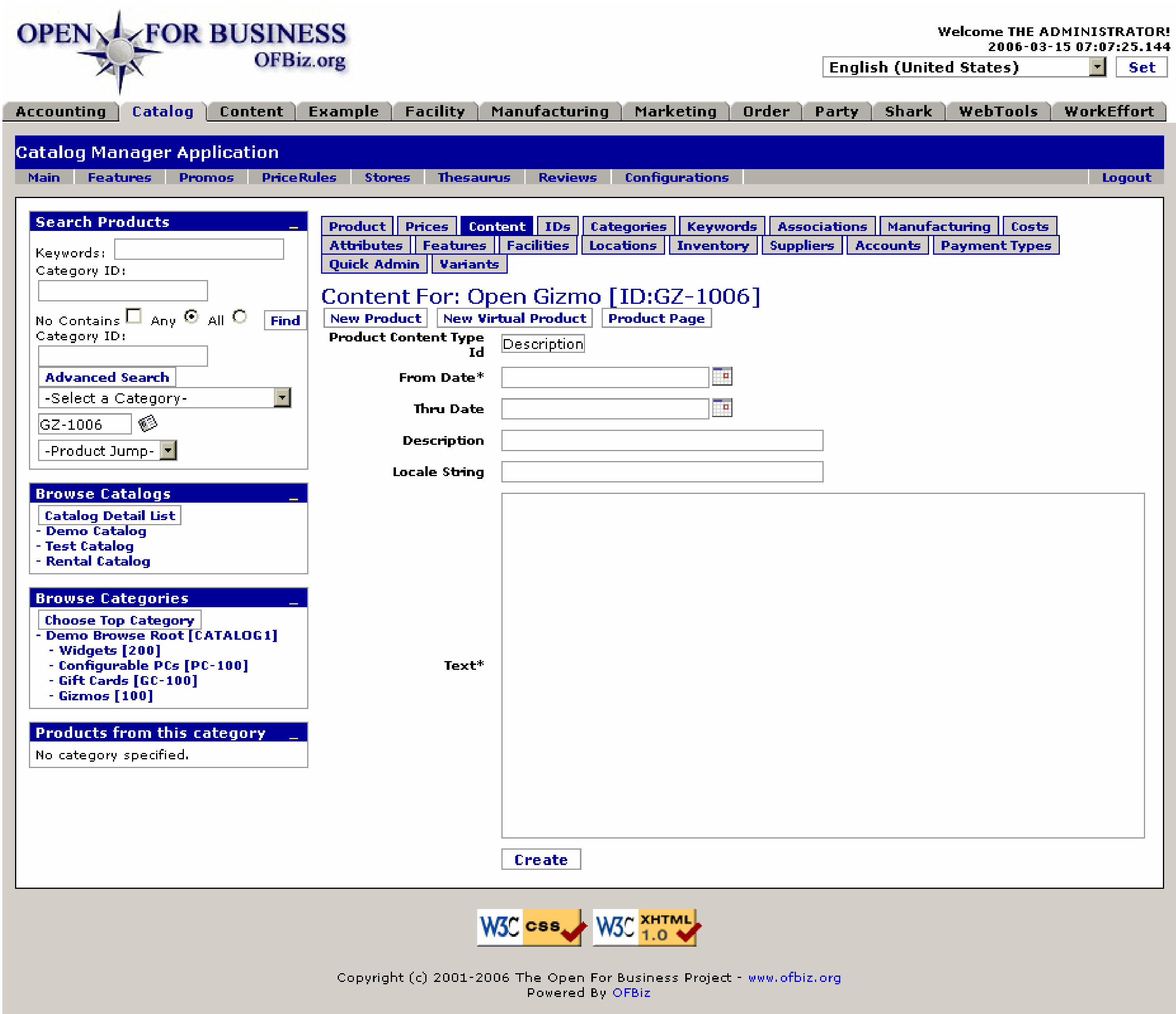
Will the periods of use time be measured in seconds, minutes, days, years?

### .9.4.3.10 Use Role

What will be the Role of the Party using this Content?

## .9.4.4 Create new Product Content

### .9.4.4.1 prepareAddContentToProduct




A click on [Prepare Create] with "Description" selected brings up this creation screen. Type determines which screen presented.

## .9.4.4.2 link buttons

[Create] [New Product] [New Virtual Product] [Product Page] [Product] [Prices] [Content] [IDs] [Categories][Keywords] [Associations] [Manufacturing] [Costs] [Attributes] [Features] [Facilities] [Locations] [Inventory] [Suppliers] [Accounts] [Payment Types] [Quick Admin] [Variants] [Configurations]

## .9.4.4.3 Product Content Type ID (drop-down box)

Select the Type from among the following; then click on [Prepare Create]. The screen presented will be determined by the Type selected.

- Description
- Description - Long
- Digital Download
- Directions
- Fulfillment Email
- Fulfillment External (Async)
- Fulfillment External (Sync)
- Image - Detail
- Image - Large
- Image - Medium
- Image - Small
- Ingredients
- Online Access
- Product Name
- Special Instructions
- Unique Ingredients
- Warnings

## .9.4.4.4 Details vary

Details for inclusion dependent upon Type ID selected.

## .9.4.4.5 When editing ...

Selection of existing Content ID for editing brings up similar screen with existing content populated.

## .9.4.5 Add Content to Product

### .9.4.5.1 Content ID

Must be existing Content. Use the popup search tool to locate Content ID.

### .9.4.5.2 Product Content Type ID (drop-down box)

Use the drop-down box to select from one of the following:

- Description
- Description - Long
- Digital Download
- Directions
- Fulfillment Email
- Fulfillment External (Async)
- Fulfillment External (Sync)
- Image - Detail
- Image - Large
- Image - Medium
- Image - Small
- Ingredients
- Online Access
- Product Name
- Special Instructions
- Unique Ingredients
- Warnings

### .9.4.5.3 From Date (popup calendar)

Date the assignment is effective.

### .9.4.5.4 Thru Date (popup calendar)

Date the assignment expires.

### .9.4.5.5 Purchase From Date (popup calendar)

Effective with purchase from which date.

#### .9.4.5.6 Purchase Thru Date (popup calendar)

Not valid for purchases after this date.

#### .9.4.5.7 Use Count Limit

The maximum number of uses.

#### .9.4.5.8 Use Time

The maximum period of time it can be used.

#### .9.4.5.9 Use Time UOM (drop-down box)

Use time is expressed in these units of time.

#### .9.4.5.10 Use Role

What is the Role of the Party using this Content.

### .9.4.6 Override Simple Fields

#### .9.4.6.1 Product Name

What the Product is called. This datapage is already associated with the selected Product ID.

#### .9.4.6.2 Product Description

Should be a short descriptive phrase.

#### .9.4.6.3 Long Description

This is your long narrative, describing or defining.

#### .9.4.6.4 Detail Screen

If not specified defaults to 'productdetail', for screens in other files use something like: 'component://ecommerce/widget/CatalogScreens.xml# productdetail'

#### .9.4.6.5 Small Image

Displays currently-loaded small-sized image to the left.Different sized images may be called out for different positions in the Catalog content. If available it is good to have each of these 4 types loaded. Insert Default Image URL, then click on the type to upload, either [.jpg] or [.gif]. Click on the link [clear] to remove the current graphic without replacement.

#### .9.4.6.6 Medium Image

Displays currently-loaded medium-sized image to the left.Different sized images may be called out for different positions in the Catalog content. If available it is good to have each of these 4 types loaded. Insert Default Image URL, then click on the type to upload, either [.jpg] or [.gif]. Click on the link [clear] to remove the current graphic without replacement.

#### .9.4.6.7 Large Image

Displays currently-loaded large-sized image to the left.Different sized images may be called out for different positions in the Catalog content. If available it is good to have each of these 4 types loaded. Insert Default Image URL, then click on the type to upload, either [.jpg] or [.gif]. Click on the link [clear] to remove the current graphic without replacement.

#### .9.4.6.8 Detail Image

Displays currently-loaded Detail Image to the left.Different sized images may be called out for different positions in the Catalog content. If available it is good to have each of these 4 types loaded. Insert Default Image URL, then click on the type to upload, either [.jpg] or [.gif]. Click on the link [clear] to remove the current graphic without replacement.

### .9.4.7 Upload Image

Enter the Image URL, or select through the Browse function. Then select an applicable Radio Button (Small / Medium / Large / Detail) and click on [Upload Image]. This function accomplishes the same purpose as each of the related lines above but, as it can only upload one image at a time, it will most likely be used for making changes.

## .9.5 IDs

## .9.5.1 EditProductGoodIdentifications


Identifications of the Product of several types are established here. Edit, delete or add ID Types and Values at this screen.

## .9.5.2 link buttons

[Update] [Delete] [Add] [New Product] [New Virtual Product] [Product Page] [Product] [Prices] [Content] [IDs][Categories] [Keywords] [Associations] [Manufacturing] [Costs] [Attributes] [Features] [Facilities] [Locations] [Inventory] [Suppliers] [Accounts] [Payment Types] [Quick Admin] [Variants] [Configurations]

## .9.5.3 Table of existing types and values

### .9.5.3.1 ID Type

This is selected in the Add ID tool, below. It cannot be changed here without creating a new one and deleting the incorrect one.

#### .9.5.3.2 ID Value

This field can be edited. Click on [Update] after any changes are complete.

### .9.5.4 Tool to Add ID

#### .9.5.4.1 ID Type (drop-down box)

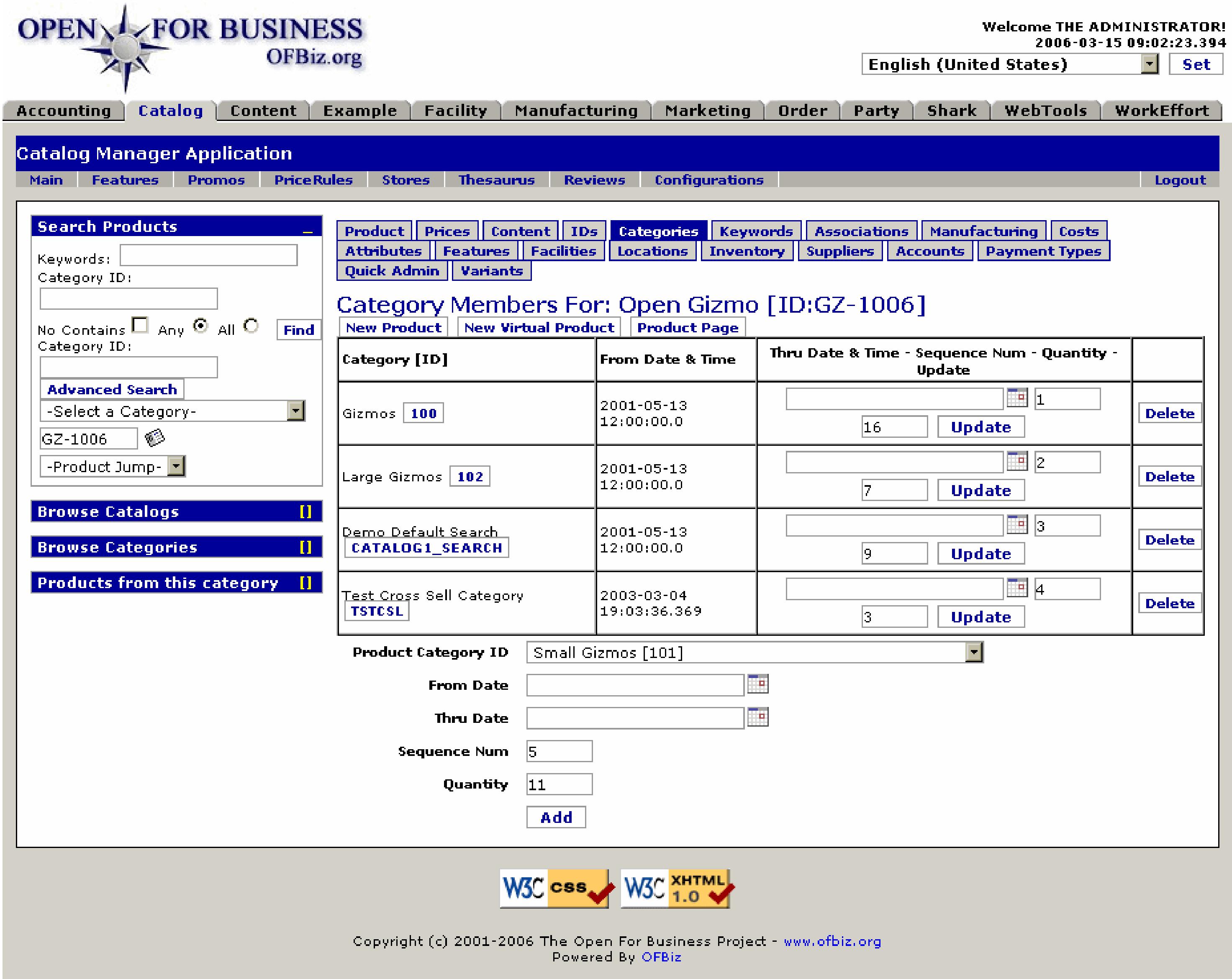
Typical ID types include: ISBN International Standard Book Number Manufacturer Number Product ID assigned by the Manufacturer; this could be your company or the OEM OtherSKU unique code identifier of inventory item UPCA Universal Product Code, type A UPCE Universal Product Code, type E

#### .9.5.4.2 ID Value

Enter the unique value here, then click on [Add].

## .9.6 Categories

### .9.6.1 EditProductCategories




Existing Categories linked to this Product are shown or deleted, new ones assigned, and duration of linkage set here.

### .9.6.2 link buttons

[Update] [Delete] [Add] [New Product] [New Virtual Product] [Product Page] [Product] [Prices] [Content] [IDs][Categories] [Keywords] [Associations] [Manufacturing] [Costs] [Attributes] [Features] [Facilities] [Locations] [Inventory] [Suppliers] [Accounts] [Payment Types] [Quick Admin] [Variants] [Configurations]

## .9.6.3 Table of existing Category links

### .9.6.3.1 Category ID

If it shows here, it should also appear in the Category searches under the Browse Categories tool in the LH pane.

Click on the ID to jump to the EditCategory screen.

### .9.6.3.2 From Date and Time

When the association with this Category was made or when it becomes effective.

### .9.6.3.3 Thru Date and Time (popup calendar)

May be edited within the table. Use the popup calendar to indicate a date and time of expiration of the association with this category.

### .9.6.3.4 Sequence Num

Optional sequencing number.

### .9.6.3.5 Quantity

How many are available or will be accommodated.

## .9.6.4 Tool to link other Product Categories

### .9.6.4.1 Product Category ID (drop-down box)

All the existing Product Categories are listed in the drop-down list. Select the one you wish to add.

### .9.6.4.2 From Date (popup calendar)

If you leave blank, the entry will default to now, when you make the association. Use the popup calendar to select a different time of effectivity.

### .9.6.4.3 Thru Date (popup calendar)

Optional. Assign a date only if you want the association to expire by a certain future time.

### .9.6.4.4 Sequence Num

Optional. Use only if you have a sequencing system in place.

### .9.6.4.5 Quantity

How many.

## .9.7 Keywords

### .9.7.1 Discussion about keywords

As it says on the screen below, 'Keywords are automatically created when product information is changed, but you may manually CREATE or DELETE keywords here as well.' On the Main page of the Catalog Manager is a link to [Auto Create Keywords for All Products]; that will also create them.Keywords are used in searches. If there are other keywords not already used in related text about the product, this is a good time to add them.

Some people might call a Widget a 'thingamabob'; if you do not associate it here, searches for thingamabobs will not bring up Widgets in their search.Also overlooked are common misspellings. A search for 'Wigit' will not return 'Widget' even if that was the intended object. You can add misspelled words to the keywords to aid in customer searches. If you have an international market, consider including foreign terms for your keywords as well.

## .9.7.2 EditProductKeyword


All Keyword editing functions can be performed here, to include "re-inducing" keywords.

## .9.7.3 link buttons

[Edit Product] [Re-induce Keywords ] [Delete All Keywords] [Delete] [Add] [New Product] [New Virtual Product][Product Page] [Product] [Prices] [Content] [IDs] [Categories] [Keywords] [Associations] [Manufacturing] [Costs][Attributes] [Features] [Facilities] [Locations] [Inventory] [Suppliers] [Accounts] [Payment Types] [Quick Admin][Variants] [Configurations]

## .9.7.4 Add product keyword

### .9.7.4.1 Keyword

Enter a word that is or should associate with the Product which might be used by someone trying to search for this type of product. Use all lower case letters.

### .9.7.4.2 Weight

Weight refers to relative values of some words over others in a search.

## .9.7.5 Table of existing Keywords

### .9.7.5.1 (Weight)

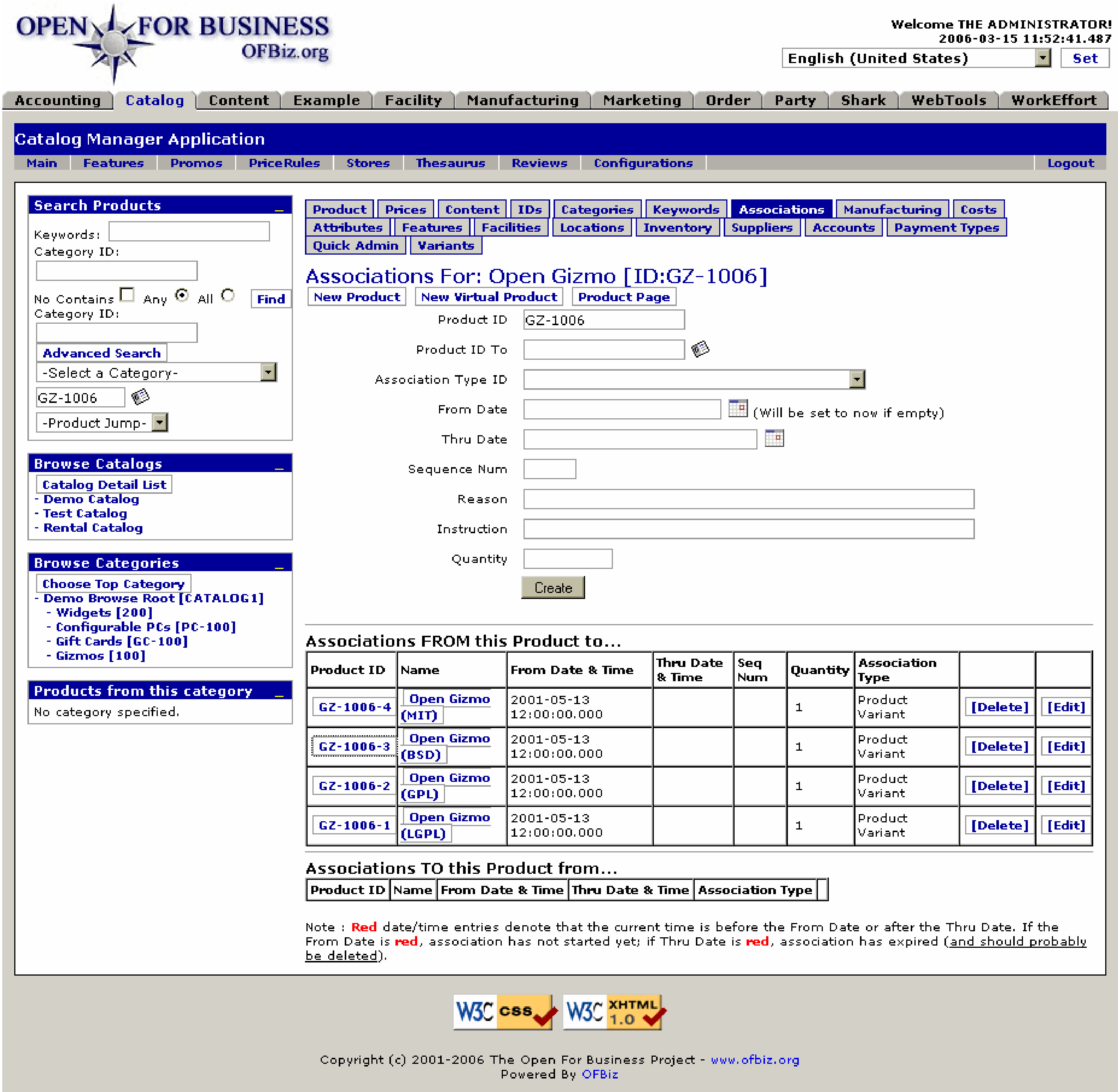
Although not labeled, the first column is the assigned Weight for the associated Keyword.

### .9.7.5.2 (Keyword)

The second column is the number, letter or word determined to be a useful Keyword in searching for this product. If you do not wish it to be considered in searches, use the [Delete] button to remove it.

## .9.8 Associations

### .9.8.1 EditProductAssoc-create




Create, edit or delete Associations with other Products from this screen. Associations TO this Product are made From the other.

## .9.8.2 link buttons

[Create] [Delete] [Edit] [New Product] [New Virtual Product] [Product Page] [Product] [Prices] [Content] [IDs][Categories] [Keywords] [Associations] [Manufacturing] [Costs] [Attributes] [Features] [Facilities] [Locations] [Inventory] [Suppliers] [Accounts] [Payment Types] [Quick Admin] [Variants] [Configurations]</B>

## .9.8.3 Tool to Create Associations

### .9.8.3.1 Product ID

Populated by current selection; enter another Product ID to create another set of associations.

### .9.8.3.2 Product ID To (popup search tool)

Select the associated Product from the popup search tool.

### .9.8.3.3 Association Type ID (drop-down box)

Describes the relationship between these products. Select from one of the following:

- Also Bought
- Upgrade or Up-Sell
- Complementary or Cross Sell
- Incompatable
- New Version, Replacement
- Marketing Package Component
- Marketing Package Auto Explode Component
- Actual Product Component
- Equivalent or Substitute
- Product Variant
- Revision
- Unique Item
- Manufacturing Bill of Materials
- Engineering Bill of Materials
- Product Manufactured As

### .9.8.3.4 From Date (popup calendar)

If left blank, will default to Now.

### .9.8.3.5 Thru Date (popup calendar)

Enter only if the Association is to expire at a particular time in the future.

### .9.8.3.6 Sequence Num

Optional use if there is a sequencing method in place.

### .9.8.3.7 Reason

Why this Association was made. Although optional, this is good information for other employees to have who might not have participated in the decision to make the association.

### .9.8.3.8 Instruction

If this Association results in certain actions or other assignments to be made, record the requirements here.

### .9.8.3.9 Quantity

How many units are involved.

## .9.8.4 Table of Associations FROM ...

### .9.8.4.1 Table of Associations FROM ...

[Edit] brings up the EditProductAssoc screen for the associated product ID.

### .9.8.4.2 Product ID

This Product ID is being associated TO. As the Table Label says, FROM the selected Product To the items listed here. Click on the ID number and you are taken to the Edit Product page for that product.

### .9.8.4.3 Name

The name of the associated Product. Click on either the ID number or this Name and you are taken to the Edit Product page for that product.

## .9.8.4.4 From Date and Time

Date of effectivity or creation of the Association.

## .9.8.4.5 Thru Date and Time

When the Association will expire.

## .9.8.4.6 Seq Num

Optional - Sequencing number.

## .9.8.4.7 Quantity

How many, if there are any restrictions on the Association.

## .9.8.4.8 Association Type

Describes the relationship between these products. Was assigned as one of the following:

- Also Bought
- Upgrade or Up-Sell
- Complementary or Cross Sell
- Incompatable
- New Version, Replacement
- Marketing Package Component
- Marketing Package Auto Explode Component
- Actual Product Component
- Equivalent or Substitute
- Product Variant
- Revision
- Unique Item
- Manufacturing Bill of Materials
- Engineering Bill of Materials
- Product Manufactured As

## .9.8.5 Table of Associations TO ...

### .9.8.5.1 Product ID

Click on the Product ID to be taken to the Product page for this Product.Note: You must create the association TO this Product from the one we have been analyzing at THIS OTHER product's page. At that point, it will be seen as From that product To this product.

### .9.8.5.2 Name

Name of the Product. Click on either the ID number or this Name and you are taken to the Edit Product page for that product.

### .9.8.5.3 From Date and Time

Date of effectivity or original assignment.

### .9.8.5.4 Thru Date and Time

Date the Association expires.

### .9.8.5.5 Association Type

Describes the relationship between these products. Was assigned as one of the following:

- Also Bought
- Upgrade or Up-Sell
- Complementary or Cross Sell
- Incompatable
- New Version, Replacement
- Marketing Package Component
- Marketing Package Auto Explode Component
- Actual Product Component
- Equivalent or Substitute
- Product Variant
- Revision
- Unique Item
- Manufacturing Bill of Materials
- Engineering Bill of Materials
- Product Manufactured As

## .9.8.6 EditProductAssoc-edit


Those items which can be edited are presented, along with the table of all associations.

## .9.8.7 link buttons

[Update]

# .9.9 Manufacturing

## .9.9.1 ViewProductManufacturing


Data in tables will reflect inputs in the Manufacturing Manager; these are summaries. Click under Edit column.

## .9.9.2 link buttons

[New Product] [New Virtual Product] [Product Page] [Product] [Prices] [Content] [IDs] [Categories] [Keywords] [Associations] [Manufacturing] [Costs] [Attributes] [Features] [Facilities] [Locations] [Inventory] [Suppliers] [Accounts] [Payment Types] [Quick Admin] [Variants] [Configurations]

## .9.9.3 Table of Routings

### .9.9.3.1 Edit

This would be the link to the ID for editing the manufacturing Routing details.

### .9.9.3.2 Estimated Quantity

How many to be manufactured.

### .9.9.3.3 Estimated Cost

How much it will probably cost.

### .9.9.3.4 From Date

When the work is to begin.

### .9.9.3.5 Thru Date

When the work is to be completed.

### .9.9.3.6 Work Effort Name

Name assigned to the effort.

## .9.9.4 Low Level Code: Components

This table extracts information from the Low Level Code component breakout and presents the data under the following headings: Edit | From Date | Thru Date | Sequence Num | Quantity | Scrap Factor | Estimate Calc Method | Product Name.

## .9.9.5 Low Level Code: Parent

Details of the Parent source of the low level code are presented in a table with the following headings: Edit | From Date | Thru Date | Quantity | Estimate Calc Method | Product Name.

# .9.10 Costs

## .9.10.1 EditProductCosts


Track the component parts of product Costs here. These costs can be used in proposals and setting prices.

## .9.10.2 link buttons

[Edit] [Submit] [New Product] [New Virtual Product] [Product Page] [Product] [Prices] [Content] [IDs] [Categories][Keywords] [Associations] [Manufacturing] [Costs] [Attributes] [Features] [Facilities] [Locations] [Inventory] [Suppliers] [Accounts] [Payment Types] [Quick Admin] [Variants] [Configurations]

## .9.10.3 Table of Costs components

### .9.10.3.1 Cost Component ID

Once created, the Component is given an ID number. When you click this number to edit the component. The terms will appear below under the Product Edit Cost Component section where you may change any element of the Cost.

### .9.10.3.2 Cost Component Type ID

Types are listed below in the description of fields used in creating Cost Components.

### .9.10.3.3 Product Feature ID

When a Product Feature is incorporated into a Product, you can identify this portion of the cost as being driven by the Feature specified here.

### .9.10.3.4 Party ID

Party establishing or entering this Cost item is identified here.

### .9.10.3.5 Geo ID

If this cost is only for or within a specific geographical area, that would be indicated by a Geo code here.

### .9.10.3.6 From Date (and Time)

Displays either the date and time when the Cost was established or the date and time when it became (or will become) effective.NOTE: If the date appears here in red, that indicates a future date; such a Cost is not yet effective.

### .9.10.3.7 Thru Date (and Time)

The date and time when the Cost has expired or will expire.NOTE: If the date appears here in red, that indicates the Cost has already expired. If you wish to renew the Cost item, click on the Cost Component Id in the LH column. The terms will appear below under the Product Edit Cost Component section where you may change the Thru Date and any other element of the Cost.

### .9.10.3.8 Cost

This number is the raw value, in the currency selected, for the Cost Component Type portion of the total cost of the Product.

### .9.10.3.9 CommonCurrencyUomId (drop-down box)

Which currency the cost is established in.

## .9.10.4 ProductEditCostComponent

### .9.10.4.1 Cost Component Type Id (drop-down box)

Select from the drop-down box which Type of cost element this Component will be. Choices available might include:

- Estimated Standard Labor Cost
- Estimated Standard Materials Cost
- Estimated Standard Other Cost
- Estimated Standard Route Cost (Fixed Asset usage)

### .9.10.4.2 Product Feature ID

When a Product Feature is incorporated into a Product, you can identify this portion of the cost as being driven by the Feature specified here. Enter only the Feature ID as known to the system. Use the Features tab of the Order manager to identify and create Features Types.

### .9.10.4.3 Party Id

Which Party established or is responsible for this Component.

### .9.10.4.4 Geo Id

If this cost is only for or within a specific geographical area, that can be indicated by a Geo code entered here.

### .9.10.4.5 From Date (popup calendar)

If nothing entered, defaults to the date and time when the Cost was established. You may enter the date and time when it became (or will become) effective.

### .9.10.4.6 Thru Date (popup calendar)

Only enter a date if this Cost Component will expire at a known point in the future.

### .9.10.4.7 Cost

Enter only the portion of the cost that is expressed in this component as specified by the Cost Component Type ID and within any other parameters presented in this component. Be sure to also select the Currency before you click [Create] or [Update].

### .9.10.4.8 CommonCurrencyUomId (drop-down box)

Find the currency in the drop-down box.

### .9.10.4.9 Cost Component Id (edit mode only)

When you have clicked upon the Cost Component ID in the table, all elements of the cost are displayed in this section of the screen. That number appears here only during this edit mode, giving you confirmation that you are working on the correct Cost Component. You may NOT change or edit this number.

## .9.10.5 ProductAutoCreateCosts

### .9.10.5.1 Discussion

This tool will consolidate existing, compatible Cost Components into a new Component, basically adding the other values together and placing this new Component into the table with a new Type designation.

### .9.10.5.2 Currency Uom Id (drop-down box)

Select the appropriate currency from the drop-down box.

### .9.10.5.3 Cost Component Type Prefix (drop-down box)

There will be at least two choices here. Select one of them, then click the [Submit] button. The new Component Cost should appear in the table, above. Types offered might be: ---Estimated Standard Costs

## .9.11 Attributes

### .9.11.1 UpdateProductAttribute


Product Attributes are declared and assigned from this screen.

### .9.11.2 link buttons

[Update] [Delete] [Add] [New Product] [New Virtual Product] [Product Page] [Product] [Prices] [Content] [IDs] [Categories] [Keywords] [Associations] [Manufacturing] [Costs] [Attributes] [Features] [Facilities] [Locations] [Inventory] [Suppliers] [Accounts] [Payment Types] [Quick Admin] [Variants] [Configurations]

## .9.11.3 Table of attributes

### .9.11.3.1 Name

What the attribute is called.

### .9.11.3.2 Value

Words to describe this value of the product.

### .9.11.3.3 Type

What type of an attribute this is.

## .9.11.4 Tool to Add Product Attribute

### .9.11.4.1 (box for Name)

Enter a descriptive name for the attribute.

### .9.11.4.2 (box for Value)

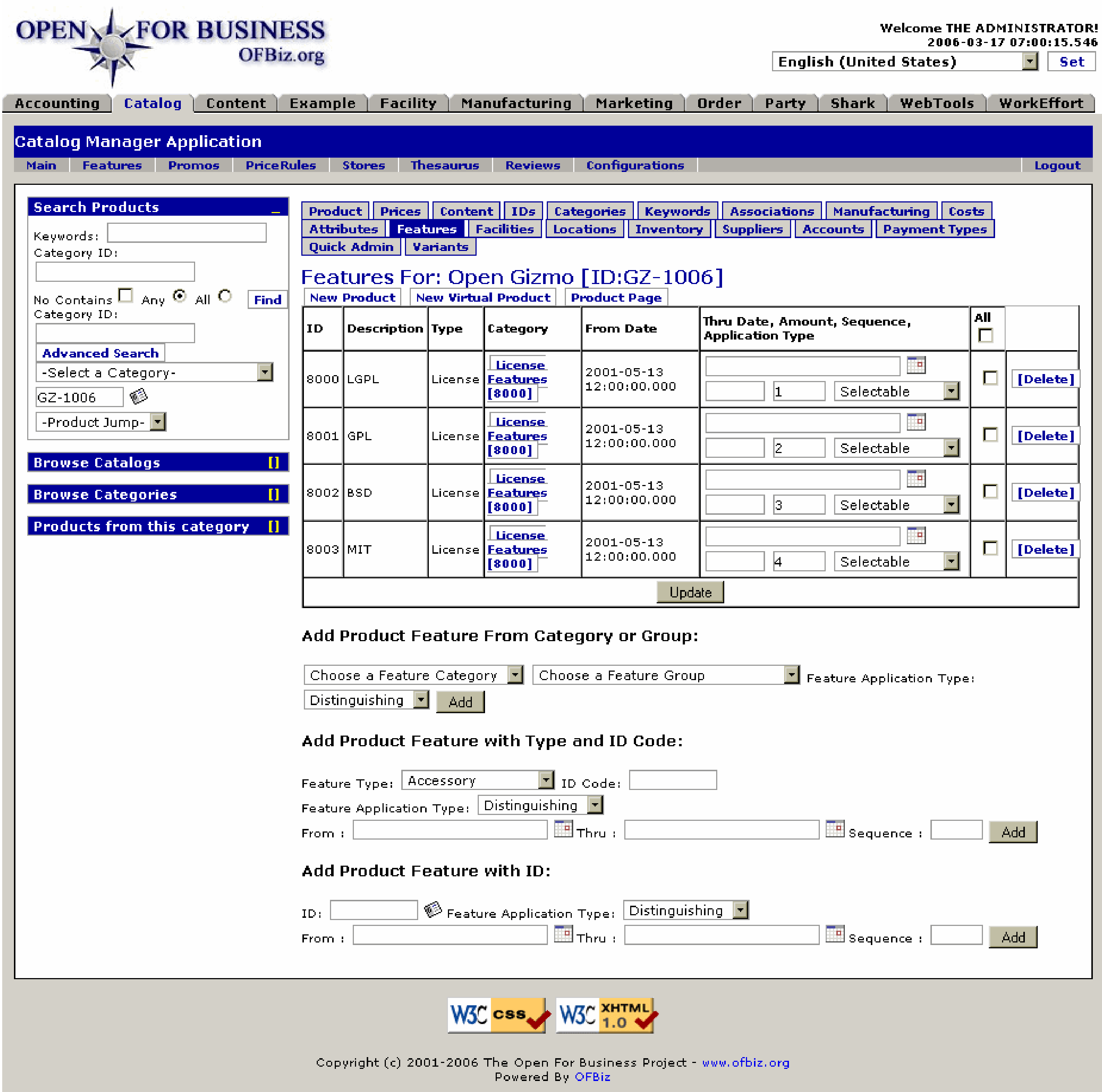
Enter a word or words to describe the Value of this Attribute.

### .9.11.4.3 (box for Type)

Enter a term to define what type of an attribute this is.

## .9.12 Features

### .9.12.1 EditProductFeatures




Product Features for the catalog are selected here. Features are then applied to the Catalog, or scheduled for later inclusion.

## .9.12.2 link buttons

[Update] [Delete] [Add] [New Product] [New Virtual Product] [Product Page] [Product] [Prices] [Content] [IDs][Categories] [Keywords] [Associations] [Manufacturing] [Costs] [Attributes] [Features] [Facilities] [Locations] [Inventory] [Suppliers] [Accounts] [Payment Types] [Quick Admin] [Variants] [Configurations]

## .9.12.3 Table of features

### .9.12.3.1 ID

This is the Feature ID number. You cannot edit it here. Click on the corresponding item under Category to edit the Feature.

### .9.12.3.2 Description

Short description which helps to identify this Feature from other features with similar IDs.

### .9.12.3.3 Type

What type of a feature this is.

### .9.12.3.4 Category

When you click on the link in this Type column, you are taken to the Feature tab where you can edit the Feature.

### .9.12.3.5 From Date

Date this Feature was assigned to this Product, or the date of its scheduled effectivity.

### .9.12.3.6 Thru Date (popup calendar)

Date this Feature is scheduled to expire, cancel or terminate its relationship to the Product. Use the popup calendar to enter or edit a new expiration date.

### .9.12.3.7 Amount

You can enter an Amount at any time.

### .9.12.3.8 Sequence

If a sequencing system is in place, the sequence number can be entered or changed here.

### .9.12.3.9 Application Type (drop-down box)

Select from one of the following Application Types:

- Selectable
- Distinguishing
- Optional
- Required
- Standard

### .9.12.3.10 All

Checkboxes in this column to identify which rows will be updated when the [Update] link is clicked. If you check the top box, all of the rows will be updated.

## .9.12.4 Add Product Feature from Category or Group

### .9.12.4.1 Category (drop-down box)

Select a Feature Category from the drop-down box.

### .9.12.4.2 Feature Group (drop-down box)

Choose a Feature Group from the drop-down box.

### .9.12.4.3 Feature Application Type (drop-down box)

Select from one of the following Application Types:

- Selectable
- Distinguishing
- Optional
- Required
- Standard

## .9.12.5 Add Product Feature with Type and ID Code

### .9.12.5.1 Feature Type (drop-down box)

Choose a Feature Type from the drop-down box.

### .9.12.5.2 ID Code

Enter an ID Code by which the new Product Feature will be known.

### .9.12.5.3 Feature Application Type (drop-down box)

Choose one of the Application Types from the drop-down box. Choices would include:

- Selectable
- Distinguishing
- Optional
- Required
- Standard

### .9.12.5.4 From (popup calendar)

Defaults to Now.

### .9.12.5.5 Thru (popup calendar)

Enter only if the Feature's association with the Product must expire at some future point.

### .9.12.5.6 Sequence

Include if a sequencing system is in place.

## .9.12.6 Add Product Feature with ID

### .9.12.6.1 ID (popup search tool)

Select from popup search tool.

## .9.12.6.2 Feature Application Type (drop-down box)

Choose one of the Application Types from the drop-down box. Choices would include:

- Selectable
- Distinguishing
- Optional
- Required
- Standard

## .9.12.6.3 From (popup calendar)

Defaults to Now.

## .9.12.6.4 Thru (popup calendar)

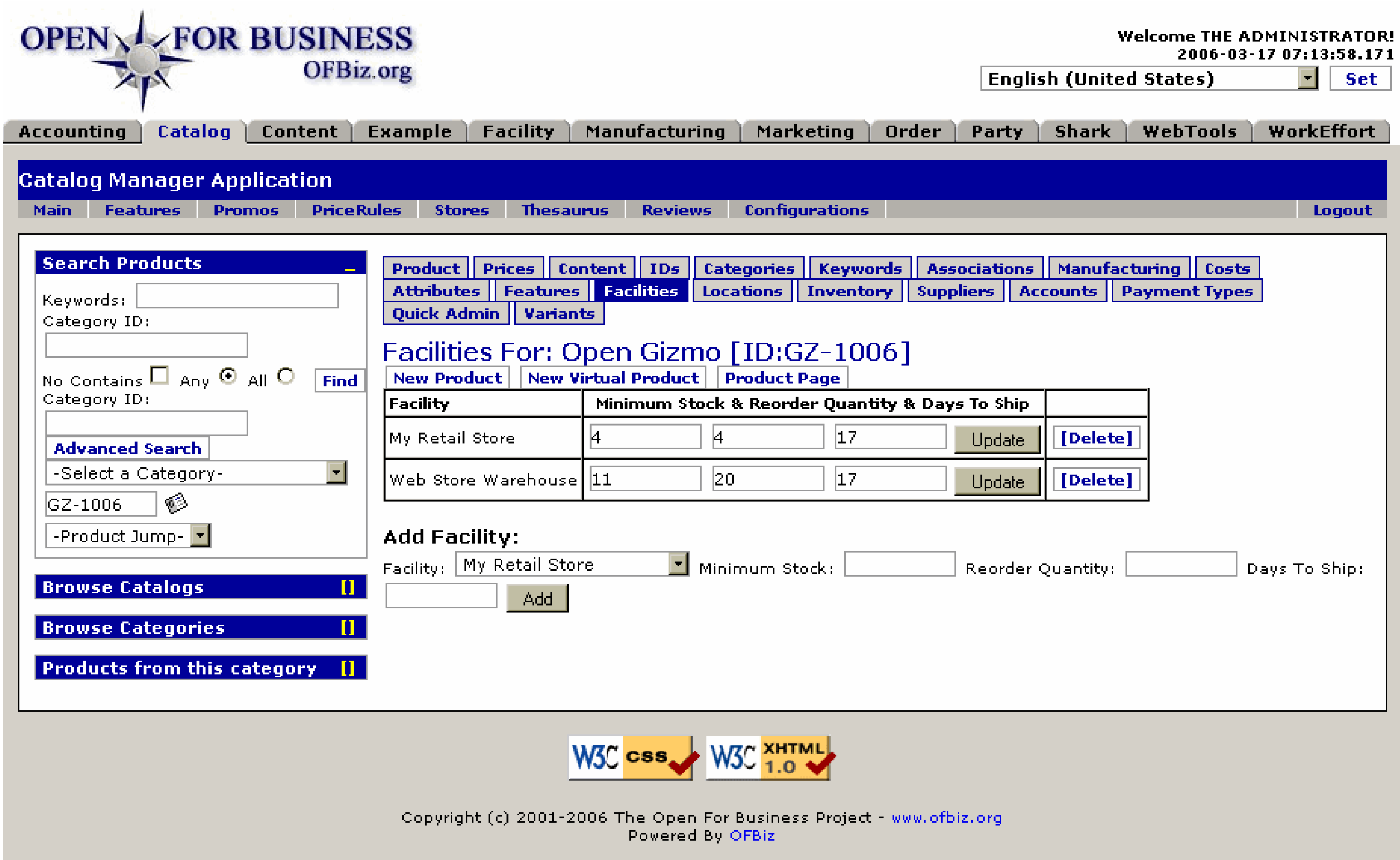
Enter a future date only if the association with this Product is to be ended at some point.

## .9.12.6.5 Sequence

Optional; enter if a sequencing system is in place.

## .9.13 Facilities

### .9.13.1 EditProductFacilities




Here you specify which Facility carries the Product, establish stock and re-order levels, and show time needed to replenish stock.

### .9.13.2 link buttons

[Update] [Delete] [Add] [New Product] [New Virtual Product] [Product Page] [Product] [Prices] [Content] [IDs][Categories] [Keywords] [Associations] [Manufacturing] [Costs] [Attributes] [Features] [Facilities] [Locations] [Inventory] [Suppliers] [Accounts] [Payment Types] [Quick Admin] [Variants] [Configurations]

### .9.13.3 Table of facilities

#### .9.13.3.1 Facility

The named facility.

#### .9.13.3.2 Minimum Stock

The level at which stock needs to be reordered.

#### .9.13.3.3 Reorder Quantity

How many to reorder when stock level reaches minimum.

#### .9.13.3.4 Days to Ship

How long it takes a vendor or the manufacturing section to deliver the replacement stock.

### .9.13.4 Add Facility

#### .9.13.4.1 Facility (drop-down box)

Select the Facility from the drop-down box.

#### .9.13.4.2 Minimum Stock

The minimum stock level at which product needs to be reordered.

#### .9.13.4.3 Reorder Quantity

How much product needs to be reordered when the stock level reaches the minimum level.

#### .9.13.4.4 Days to Ship

How many days to receive the product from a Vendor or the factory.

## .9.14 Locations

Virtual products will not have a location, only their variants.

## .9.14.1 EditProductFacilityLocations


Update or add location of the Product within a Facility. Location Sequence is specific; see the Facility Manager.

## .9.14.2 link buttons

[Add] [Update] [Delete] [New Product] [New Virtual Product] [Product Page] [Product] [Prices] [Content] [IDs][Categories] [Keywords] [Associations] [Manufacturing] [Costs] [Attributes] [Features] [Facilities] [Locations] [Inventory] [Suppliers] [Accounts] [Payment Types] [Quick Admin] [Variants] [Configurations]

## .9.14.3 Table of existing locations

### .9.14.3.1 Facility

The Facility where the Product is being Located.

#### .9.14.3.2 Location

The place within the Facility where the Product will be found.

#### .9.14.3.3 Minimum Stock

The minimum stock level at which more stock is ordered to replenish.

#### .9.14.3.4 Move Quantity

The minimum amount to be moved to this location.

### .9.14.4 Add Facility Location

#### .9.14.4.1 Facility (drop-down box)

Select the Facility within which you will specify a stock location.

#### .9.14.4.2 Location Sequence ID

This is a specific kind of ID that is actually created in the Facilities Manager.

#### .9.14.4.3 Minimum Stock

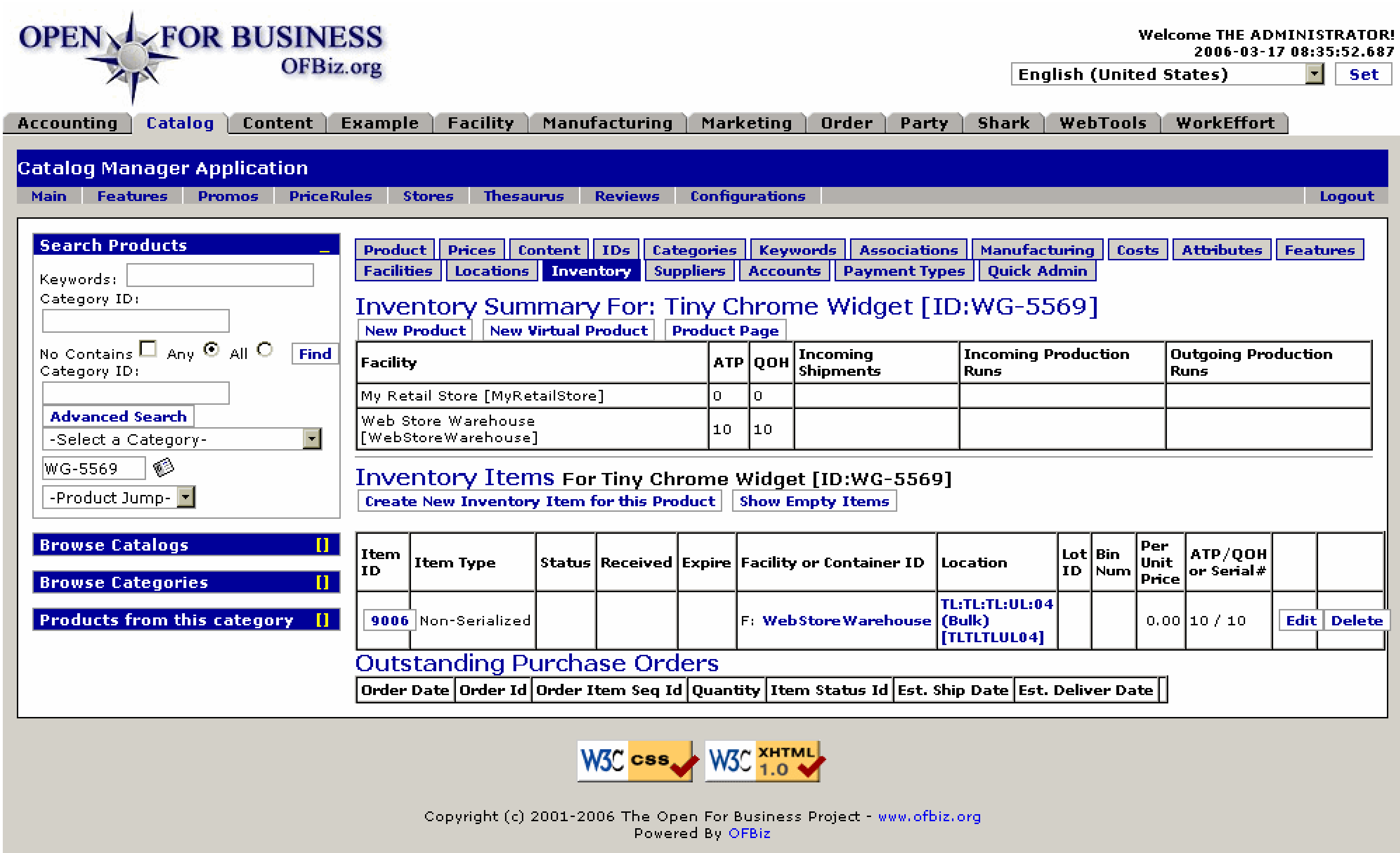
The minimum quantity of Product at which point stock is to be reordered.

#### .9.14.4.4 Move Quantity

Amount of stock to be moved.

# .9.15 Inventory

## .9.15.1 EditProductInventoryItems




Inventory status at each location in every facility for this product is displayed here. Updates are reflected back into the Facility Manager.

## .9.15.2 link buttons

[Create New Inventory Item for this Product ] [Show/Hide Empty Items] [Edit] [Delete] [New Product] [New VirtualProduct] [Product Page][Product] [Prices] [Content] [IDs] [Categories] [Keywords] [Associations] [Manufacturing] [Costs] [Attributes] [Features] [Facilities] [Locations] [Inventory] [Suppliers] [Accounts] [Payment Types] [Quick Admin] [Variants] [Configurations]

## .9.15.3 Inventory Summary table

### .9.15.3.1 Facility

Name and ID of the facility where the Inventory is located.

### .9.15.3.2 ATP

Number of units Available To Process at each location.

### .9.15.3.3 QOH

What the actual Quantity On Hand consists of at the time of Inventory. Some of the QOH could be held for outstanding orders, thus not be available to process.

### .9.15.3.4 Incoming Shipments

If there were Incoming Shipments, the ID number(s) would be indicated here.

### .9.15.3.5 Incoming Production Runs

If there were Incoming Production Runs, the ID numbers of those Production Runs would be given here.

### .9.15.3.6 Outgoing Production Runs

Product going out to another Facility or committed in a Sales Order would be identified by the ID number here.

## .9.15.4 Inventory Items

### .9.15.4.1 Discussion

Select the link [Create New ...] or click on the Item ID to jump you to the Facility Manager for creating a new item.

### .9.15.4.2 Item ID

Click on the ID and you are taken to the EditInventoryItem screen in the Facility Manager; see below in this topic for a screen shot.NOTE: Product is not tracked by its Product ID as much as it is by its Inventory Item ID.

You might have several locations with Product; by tracking it through Item ID, you can more accurately locate the Product when you need it. Thus, several different Item IDs may all have the same Product ID.

### .9.15.4.3 Item Type

Serialized or Non-Serialized. When each Item has its own serial number that needs to be tracked, Inventory is handled more tightly.

### .9.15.4.4 Status

The products in the Item ID might be On Hold in the receiving docks, Awaiting Inspection, Damaged In Transit, etc.

Status is generally given if there is some situation keeping the product from being available for release to a customer.

### .9.15.4.5 Received

When the Inventory Item was received.

### .9.15.4.6 Expire

If the Inventory Item will expire, that is given here.

### .9.15.4.7 Facility or Container ID

If you click on the ID; it will link you to the Facility Manager > Facilities tab > Facility sub-tab with the Edit Facility screen for viewing.

### .9.15.4.8 Location

The Location ID is created from a concatenation of location specifics in the Facility Manager > Locations tab. Click on the Location ID here in this column and it will take you there in the EditFacilityLocation screen which you can edit or update.

### .9.15.4.9 Lot ID

If there is an ID for a specific Product Lot, it will be given here.

### .9.15.4.10 Bin Num

If the Product or at least this portion of it (Item ID) if kept in a Bin, that Bin Number will be given here.

### .9.15.4.11 Price Per Unit

Price upon which total Inventory value is based.

### .9.15.4.12 ATP/QOH or Serial#

If non-serialized, the ATP is shown over the QOH. For serialized inventory, each line item will have its own Serial number.

## .9.15.4.13 EditInventoryItem


This screen (under the Facility Manager) deals specifically with the Inventory Item.

### .9.15.4.14 See the Facility Manager

Selecting the Item ID number (or the [Edit] link) jumps you to this item on the FacilityManager > Facilities > Inventory Items edit screen (EditInventoryItem). For more details, see the Facility Manager.

### .9.15.5 Outstanding Purchase Orders

If there are any outstanding Purchase Orders against this item, they will appear here with details given under the following headings:

- Order Date
- Order Id
- Order Item Seq Id
- Quantity
- Item Status Id
- Est. Ship Date
- Est. Deliver Date

## .9.16 Suppliers

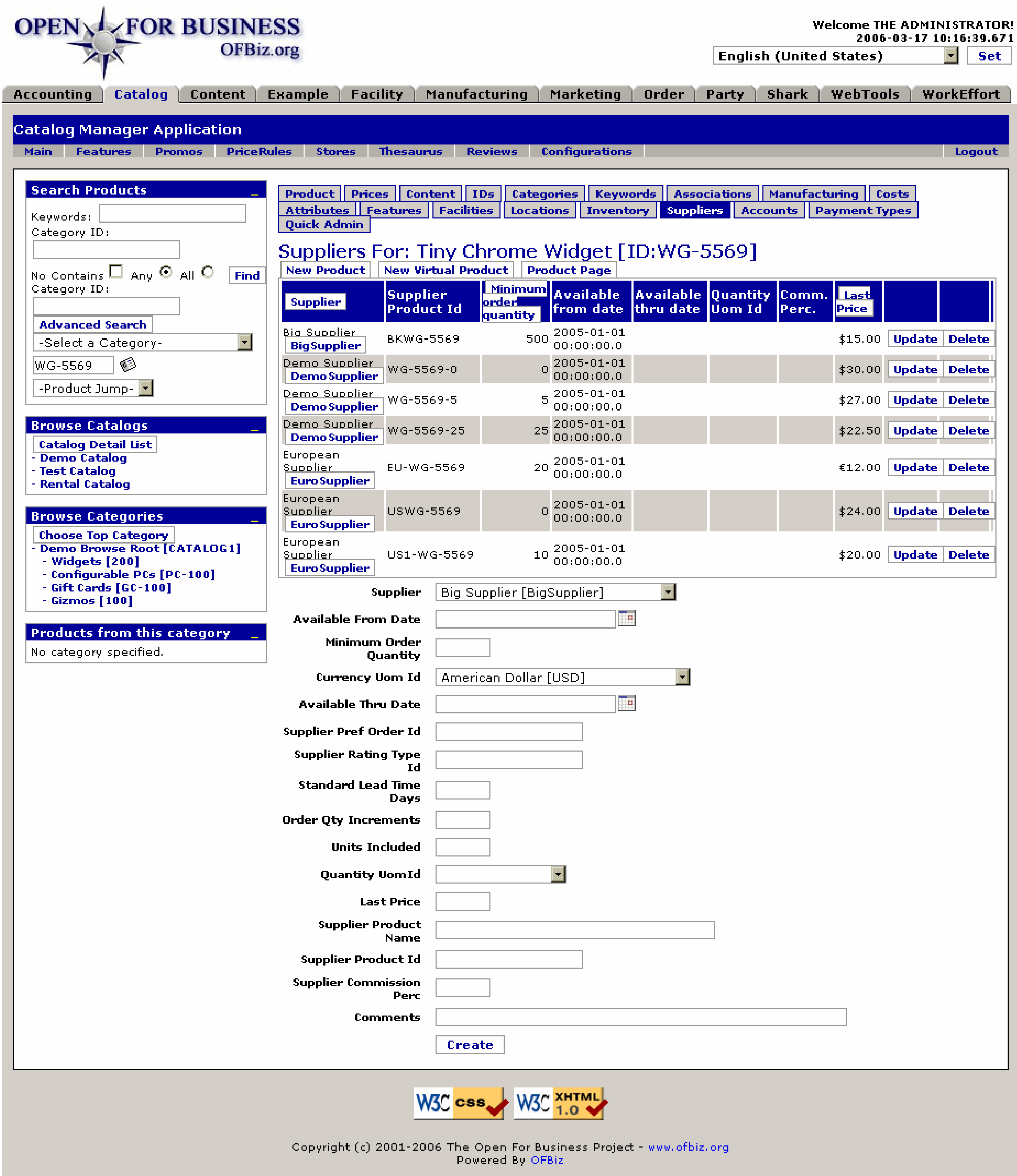
### .9.16.1 Discussion

This section is critical to complete accurately. This is where you establish the details about your inventory sources. If this section is incomplete, you might not be able to order the item from your vendors!

Every product in every variant needs to have its own entry, with distinct details about every supplier for each item. You should only need to do this once, as part of establishing a new Product in your Store.

Each time you receive communication from your Vendor that changes details such as delivery time, minimum order quanitities, price breaks, etc., you should update your information here.You will keep details about Promotions in the Catalog Promos section.

### .9.16.2 EditProductSuppliers




Associate Suppliers with the Product at this screen. Each must first have a PartyID; multiple suppliers for the product are shown.

## .9.16.3 link buttons

[Update] [Delete] [Create] [New Product] [New Virtual Product] [Product Page] [Product] [Prices] [Content] [IDs] [Categories] [Keywords] [Associations] [Manufacturing] [Costs] [Attributes] [Features] [Facilities] [Locations] [Inventory] [Suppliers] [Accounts] [Payment Types] [Quick Admin] [Variants] [Configurations]

## .9.16.4 Table of existing Suppliers

### .9.16.4.1 Table sort order

Three of the columns have reverse-color highlighting: Supplier, Minimum order quantity, and Last Price. You can click on the column title to have the items sorted by those categories.

### .9.16.4.2 Supplier

Click on the ID link to be taken to the Party Manager for more information about the Supplier.

### .9.16.4.3 Supplier Product ID

This is the ID used by the Supplier, not the number used by your company or catalog.

### .9.16.4.4 Minimum Order Quantity

What is the smallest number of units that can be ordered from this Supplier?

### .9.16.4.5 Available from date

If availability is not continuous, this tells you when it will be.

### .9.16.4.6 Available thru date

If the product will no longer be available after some date, the date is shown here.

### .9.16.4.7 Quantity UOM ID

Not all Product will be ordered in quantities of Each. When the Supplier sells only in case lots, for example, that will be specified here.

### .9.16.4.8 Comm. Perc.

The percentage charged by the Supplier as his commission, if any.

### .9.16.4.9 Last Price

What was the Price per Quantity UOM the last time you ordered from or received a Quote from this Supplier?

## .9.16.5 Tool to add new Supplier

### .9.16.5.1 Supplier (drop-down box)

Party must already exist in the Party Manager system with an assigned Role as a Supplier. Parties holding the Supplier Role appear in the drop-down box.

### .9.16.5.2 Available from date (popup calendar)

When was the Supplier first able to provide this Product for your company?

### .9.16.5.3 Minimum Order Quantity

Required field. MinimumOrderQuantity is used to define the minimum quantity of units that can be purchased from this supplier at this price.NOTE: If you try to order fewer than this number when creating a Purchase Order, your order will not be processed. Be sure this is a valid number. If you have permission from your supplier to order a smaller quantity, change this number here before attempting to create the PO.

### .9.16.5.4 Currency Uom ID (drop-down box)

Required field. This is the currency's Uom ID (unit of measurement ID), e.g.: USD, Euro, etc.

### .9.16.5.5 Available Thru Date (popup calendar)

When will the Vendor Role expire for this Supplier? This may be due to a periodic review, an announcement that they are no longer able to supply the Product, an agreement you have to make another Supplier the exclusive vendor, or any number of reasons.

### .9.16.5.6 Supplier Pref Order ID

What does the Supplier use to identify your Product? This is the name or part number that you must use to obtain the correct item from this vendor.

### .9.16.5.7 Supplier Rating Type ID

Give them a rating to compare them with other Suppliers.

### .9.16.5.8 Standard Lead Time Days

How much advance notice is needed by this supplier to provide this product. Some products might be 'on the shelf;' others might need to be assembled or manufactured. This information is critical if you want to maintain a current inventory.

### .9.16.5.9 Order Quantity Increments

Is the Supplier able to accommodate orders of 6 units this time, 25 units next, the 13 units at another time? That would mean an Order Qty Increment of '1'. Or does the order need to be in increments of 10, with a minimum order quantity stated as 30, for example, so you would need to order 30 or 40 or 80.

### .9.16.5.10 Units Included

Similar to Order Qty Increments, but this would be a matter of how units are packaged. If the units are by the carton with 24 counts of a product in a carton, the units included would be 24.

### .9.16.5.11 Quantity Uom ID (drop-down box)

When product is measured by some Unit of Measure that is specified by any of the UOM IDs on the drop-down list, use this. Otherwise, leave blank.

### .9.16.5.12 Last Price

Last Price is the price for the item from the supplier. Whether as the result of a Price List sent out by them, or by their response to a Request for Quotation, or it is the last price you paid with your most recent order from them - whatever the basis, this is the most accurate price you have for this item from this Supplier.

### .9.16.5.13 Supplier Product Name

The name used by the Supplier, not your catalog or company name for the product (unless it happens to be the same!!).

### .9.16.5.14 Supplier Product ID

What is the Code, or Part Number or specific Identification used by this Supplier for the Product you are ordering from them?

### .9.16.5.15 Supplier Commission Perc

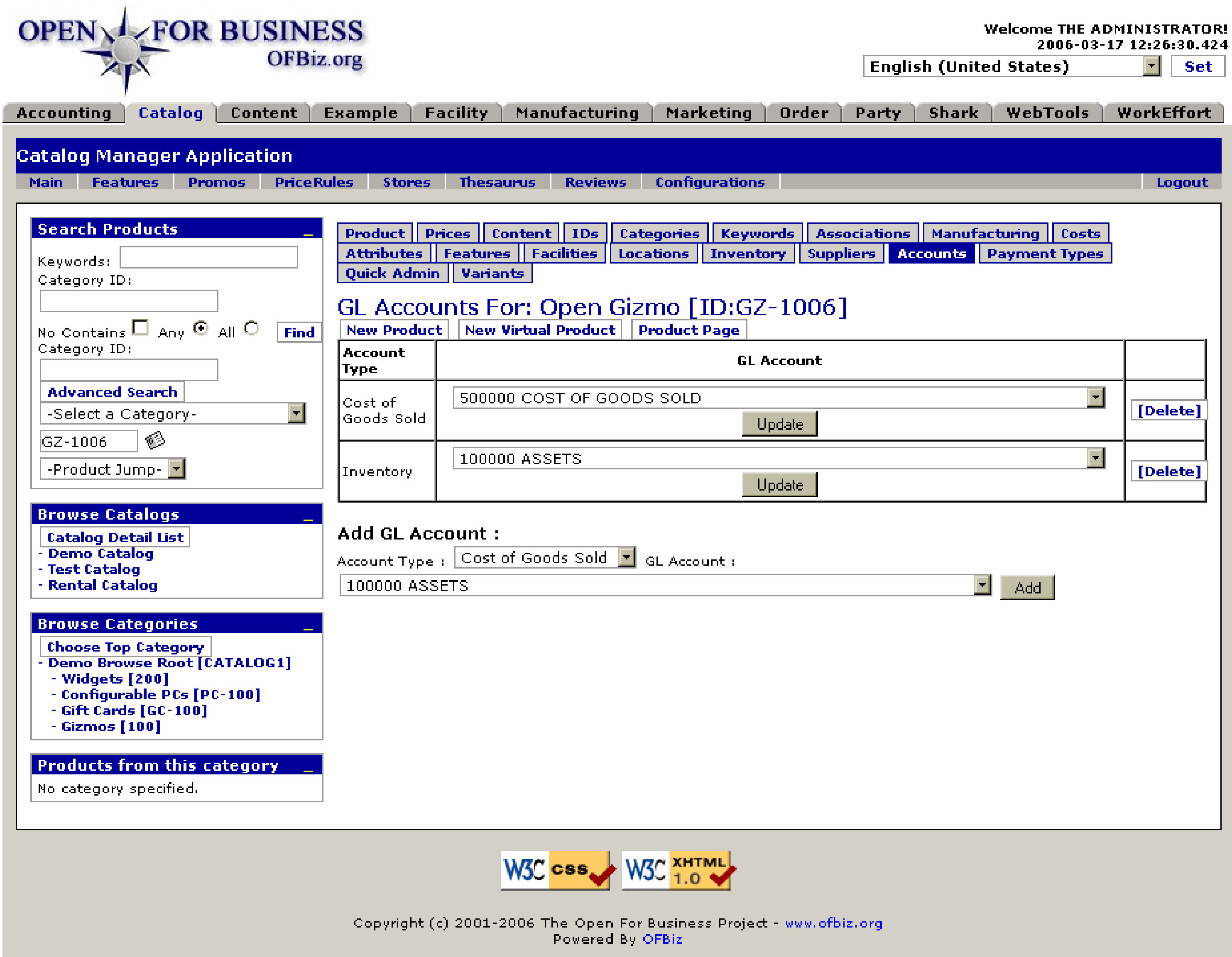
What Commission percentage this Supplier will charge on the order.

### .9.16.5.16 Comments

Here you could note such information as the Factory Rep's name, the best time of day to reach the seller, any particular information to help you maintain a smooth customer relationship with this Supplier.

## .9.17 Accounts

### .9.17.1 EditProductGlAccounts




General Ledger accounts for this Product may be assigned or updated from this screen. Connects with the Accounting Manager.

### .9.17.2 link buttons

[Update] [Delete] [Add] [New Product] [New Virtual Product] [Product Page] [Product] [Prices] [Content] [IDs][Categories] [Keywords] [Associations] [Manufacturing] [Costs] [Attributes] [Features] [Facilities] [Locations] [Inventory] [Suppliers] [Accounts] [Payment Types] [Quick Admin] [Variants] [Configurations]

## .9.17.3 Table of assigned GL Accounts

### .9.17.3.1 Account Type

What type of Account is this:Cost of Goods SoldInventorySales.

### .9.17.3.2 GL Account (drop-down box)

All GL Accounts appear in the drop-down box. You can change this at any time, but you should not do so without working with your accountant.

## .9.17.4 Add a General Ledger Account

### .9.17.4.1 Account Type (drop-down box)

Select from the drop-down box what type of Account this is: Cost of Goods SoldInventory Sales

### .9.17.4.2 GL Account (drop-down box)

All GL Accounts appear in the drop-down box; assign an account from here, but you should not do so without working with your accountant.

## .9.18 Payment Types

### .9.18.1 EditProductPaymentMethodTypes


View and edit any Payment type. These can be established, updated or deleted here.

### .9.18.2 link buttons

[Update] [Delete] [Create] [New Product] [New Virtual Product] [Product Page] [Product] [Prices] [Content] [IDs] [Categories] [Keywords] [Associations] [Manufacturing] [Costs] [Attributes] [Features] [Facilities] [Locations]

## .9.18.3 Table of Payment Method Types

### .9.18.3.1 Payment Method Type

This describes how the payments are made.

### .9.18.3.2 Purpose

Why the Payment would be made.

### .9.18.3.3 From Date and Time

When this Payment Method was established.

### .9.18.3.4 Thru Date (popup calendar)

When this Payment Method will expire, if ever.

### .9.18.3.5 Sequence Num

If there is a sequencing system in place, this is the Sequence Number for this item.

## .9.18.4 Tool to add Payment Method Types

### .9.18.4.1 Payment Method Type (drop-down box)

Select the Payment Method from the drop-down list of types. Choices might include:

- Billing Account
- Cash
- Cash On Delivery
- Certified Check
- Company Account
- Company Check
- Credit Card
- Electronic Funds Transfer
- Gift Card
- Gift Certificate

- Money Order
- Offline Payment
- PayPalP
- Personal Check
- WorldPay

#### .9.18.4.2 Purpose (drop-down box)

For what purpose will the Payment be made? Select from among these choices: Component Price Purchase/InitialRecurring ChargeUsage Charge

#### .9.18.4.3 From Date (popup calendar)

Defaults to Now. Select a different Date and Time of effectivity if appropriate.

#### .9.18.4.4 Thru Date (popup calendar)

If this Payment Method Type is going to expire for some reason in the future, indicate the expiration date here.

#### .9.18.4.5 Sequence Num

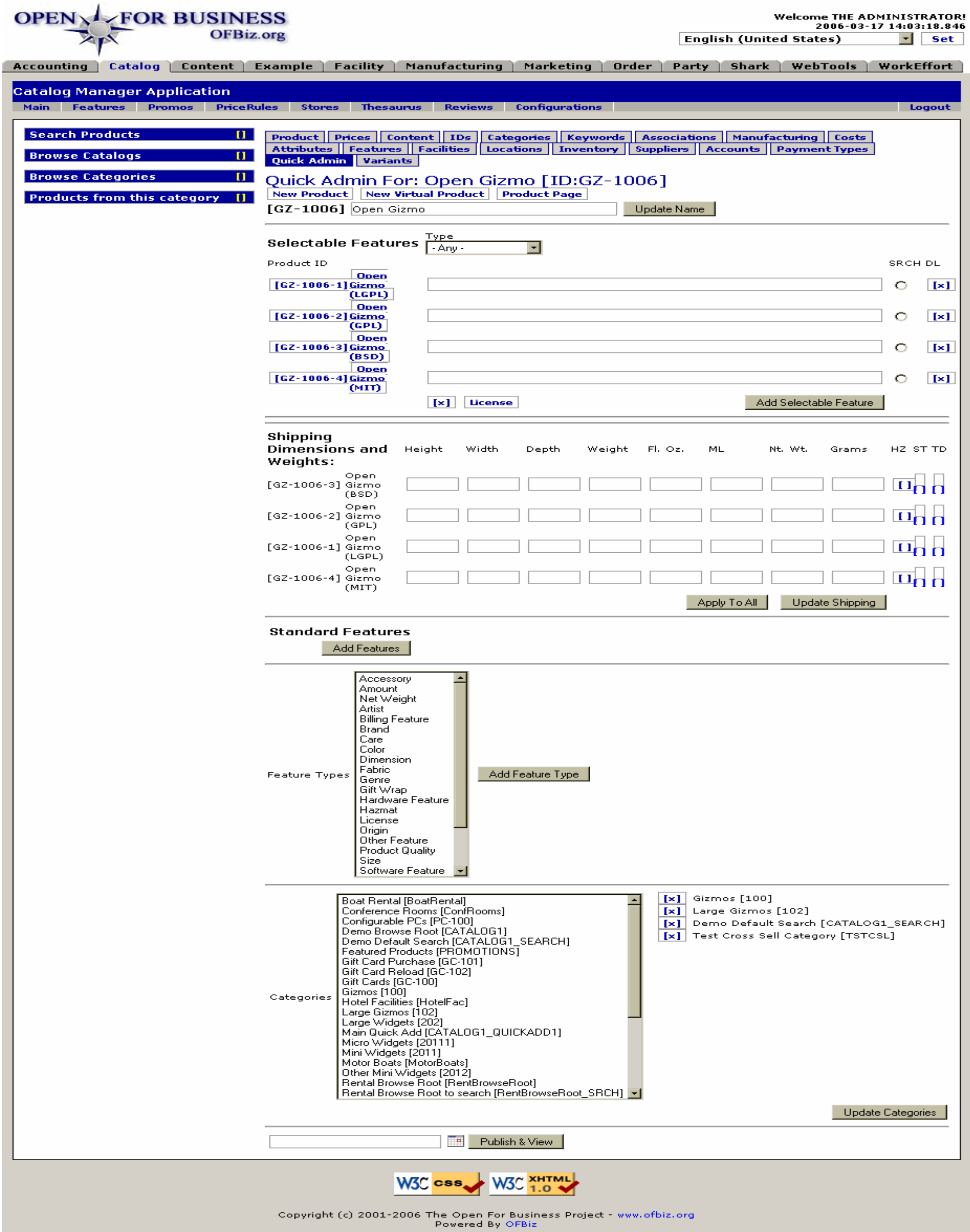
If a sequencing system is in place, enter the Sequence Number here.

## .9.19 Quick Admin

### .9.19.1 Discussion

This screen is for your convenience. Most of the tools presented here duplicate functions found at other screens. They are gathered in one screen here to give access to those common items you frequently need to update about your product. This screen could be modified by your programmer to include other (or fewer) functions.

### .9.19.2 EditProductQuickAdmin




Quick access is provided here to many of the commonly-revised elements of Product support, all gathered at one screen.

### .9.19.3 link buttons

[Update Name] [License] [Add Selectable Feature] [Apply to All] [Update Shipping] [Add Features] [Add Feature Type] [Update Categories] [Publish n View] [Remove From Site] [New Product] [New Virtual Product] [Product Page] [Product] [Prices] [Content] [IDs] [Categories] [Keywords] [Associations] [Manufacturing] [Costs] [Attributes] [Features] [Facilities] [Locations] [Inventory] [Suppliers] [Accounts] [Payment Types] [Quick Admin] [Variants][Configurations]

### .9.19.4 Product Name

If you wish to change the Name of the Product, enter the new one in the box and click on [Update Name].

### .9.19.5 Selectable Features

If a Selectable Feature in the drop-down box can be applied to the Product, it will be added when the [Add Selectable Feature] button is clicked. Delete a Feature by clicking on the [x] link.

### .9.19.6 Shipping Dimensions and Weights

Add or revise any of the measurements given then click on [Update Shipping]. HZ, ST and TD are check boxes.

### .9.19.7 Standard Features

Existing features are listed; click on the [x] to remove. Select from the drop-down box then click on [Add Features] as needed.

### .9.19.8 Feature Types

Click on new Feature Types in the drop-down box, then click on [Add Feature Types]. Added Features will appear in the previous section above, where you can then click to Add Feature.

### .9.19.9 Categories

Click on new ones in the drop-down box, then click on the [Update Categories] command. To remove, click on the [x] box beside the Category in the list.

### .9.19.10 View/remove product page (popup calendar)

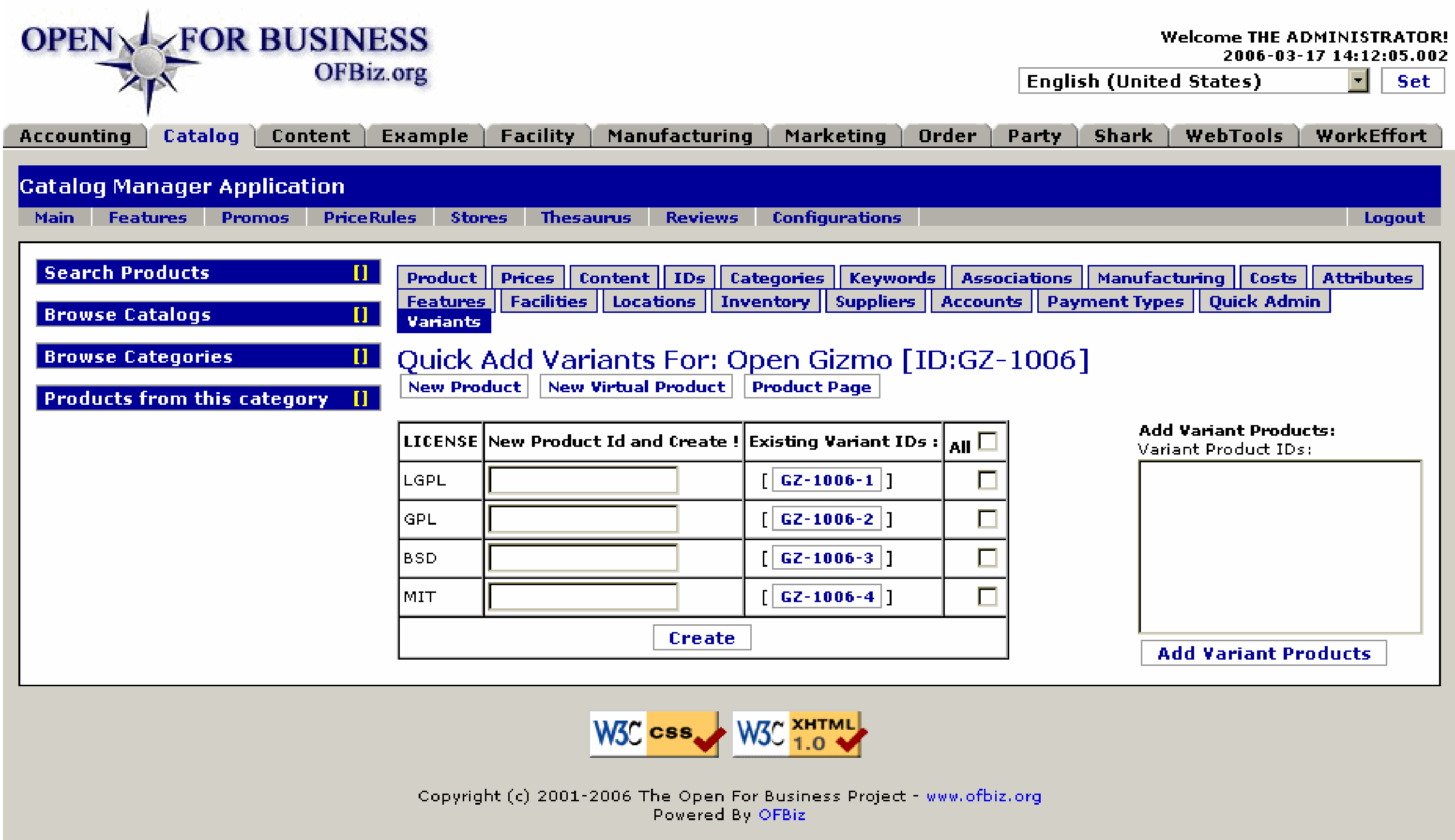
This calendar schedules a publication date and time for any new changes. Click on [Publish n View] to publish immediately and be taken to a new screen in the ecommerce site for this product.After publication, the option changes. The calendar now schedules the date and time for the item to be removed from publication. To remove immediately, click on [Remove From Site].

## .9.20 Variants

### .9.20.1 Quick Create Virtual from Variants

On the Catalog Administration Main Page is a link [Quick Create Virtual from Variants]. You can enter a Product ID in the box then click on this link for a shortcut to creating Virtual products from existing Variants.

### .9.20.2 QuickAddVariants




Quickly establish new Variants for virtual products here; parameters of the Virtual Products determine what is displayed.

### .9.20.3 link buttons

[Create] [Add Variant Products] [New Product] [New Virtual Product] [Product Page] [Product] [Prices] [Content] [IDs] [Categories] [Keywords] [Associations] [Manufacturing] [Costs] [Attributes] [Features] [Facilities] [Locations] [Inventory] [Suppliers] [Accounts] [Payment Types] [Quick Admin] [Variants] [Configurations]

## .9.20.4 Discussion

Options shown here are examples. Virtual products with 'Selectable' Application Type features can be quickly defined with Variant Features at this screen. These choices will be what appears to the customer when he makes his choices in the catalog. Options presented depend upon the product selected.Labels and choices shown are determined by programming behind this screen. For example, instead of size and color, choices could be in text language for a document, along with its format (print, PDF file, cd, etc.)

When the Product is not identified as a Virtual Product to the system, the system might still work with you but you will get an error message: 'This product is not a virtual product, variants will not generally be used.'

## .9.21 Configurations

### .9.21.1 EditProductConfigs

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Welcome THE ADMINISTRATOR!
2006-03-17 14:24:54.596
English (United States) Set

Accounting | Catalog | Content | Example | Facility | Manufacturing | Marketing | Order | Party | Shark | WebTools | WorkEffort

Catalog Manager Application

Main | Features | Promos | PriceRules | Stores | Thesaurus | Reviews | Configurations | Logout

Search Products []
Browse Catalogs []
Browse Categories []
Products from this category []

Product | Prices | Content | IDs | Categories | Keywords | Associations | Manufacturing | Costs | Attributes | Features | Facilities | Locations | Inventory | Suppliers | Accounts | Payment Types | Quick Admin | Configurations

## Configurations For: Configurable PC [ID:PC001]

New Product | New Virtual Product | Product Page

| ProductConfig | CommonSeqNum | From Date & Time | Description - Long Description - ProductConfigTypeId - Thru Date - Is Mandatory - Update | |
|---|---|---|---|---|
| RAM (brand) [IT0000] (Select the memory configuration:) | 10 | 2004-08-20 12:59:26.209 | Question Y Update | Delete |
| HD (brand) [IT0001] (Select the Hard Disk:) | 20 | 2004-08-20 12:59:26.209 | 1st Hard Disk drive Question Y Update | Delete |
| HD (brand) [IT0001] (Select the Hard Disk:) | 30 | 2004-08-20 12:59:26.209 | 2nd Hard Disk drive Question N Update | Delete |
| PCI slot [IT0002] (Select the PCI cards:) | 40 | 2004-08-20 12:59:26.209 | Question N Update | Delete |

ProductConfigItemId: HD (brand) [IT0001] (Select the Hard Disk:)
Sequence Num:
From Date:
Description:
Long Description:
ProductConfigTypeId: Standard
Thru Date:
Is Mandatory: Y
Create



Configuration details are gathered together for an aggregated product such as personal computer, automobile, trip planning, etc.

### .9.21.2 link buttons

[Update] [Delete] [Create] [New Product] [New Virtual Product] [Product Page] [Product] [Prices] [Content] [IDs] [Categories] [Keywords] [Associations] [Manufacturing] [Costs] [Attributes] [Features] [Facilities] [Locations] [Inventory] [Suppliers] [Accounts] [Payment Types] [Quick Admin] [Variants] [Configurations]

### .9.21.3 Product Config

This item identifies which subordinate product is being configured here. The item must already exist and be associated with the Configurable Product before it will appear here.

### .9.21.4 CommonSeqNum

Sometimes the sequence of assembling a Configurable Product is significant. The number here identifies the heirarchy position.

### .9.21.5 From Date and Time

When was this particular Configuration established.

### .9.21.6 Configuration working section

#### .9.21.6.1 Description

This short description is used when a name is needed for a numbered item.

#### .9.21.6.2 Long Description

Information needed in making a decision about the item. Describe what it does, how it works, its advantages, related needs (controller, software, etc.), and why the customer should have it.

#### .9.21.6.3 Product Config Type ID (drop-down box)

In this instance, the Config Type ID is establishing whether the item is a standard part or will the customer be asked (Question) whether he wants it.

### .9.21.6.4 Thru Date (popup calendar)

Expiration of validity for the Configuration, if any. Perhaps this particular option will not be offered after a certain date, for example.

### .9.21.6.5 Is Mandatory (Y/N)

Some components of a Configurable Product are needed or the product will not function, eg: memory for a PC.

Others, such as a 2nd Hard Drive, would not be mandatory.

## .9.21.7 Tool to add configuration

### .9.21.7.1 Product Config Item ID (drop-down box)

Select from those Configuration Types already established.

### .9.21.7.2 Sequence Num

If there is a sequencing system, enter the Sequence number here.

### .9.21.7.3 From Date (popup calendar)

When was this configuration created or when will it be effective from.

### .9.21.7.4 Description

This short description is used when a descriptive name is needed to better identify a numbered item.

### .9.21.7.5 Long Description

Information needed in making a decision about the item. Describe what it does, how it works, its advantages, related needs (controller, software, etc.), and why the customer should have it.

### .9.21.7.6 Product Config Type ID (drop-down box)

Select from the drop-down box. In this instance, the Config Type ID is establishing whether the item is a standard part or will the customer be asked (Question) whether he wants it.

#### .9.21.7.7 Thru Date (popup calendar)

Expiration of validity for the Configuration, if any.

#### .9.21.7.8 Is Mandatory (Y/N)

Some components of a Configurable Product are needed or the product will not function, eg: memory for a PC.

Others, such as a second Hard Drive, would not be mandatory.

# .10 Tab - Catalog Features

## .10.1 Discussion of Features

While there are tabs to screens for Feature Types, Feature Categories, and Feature Groups, to actually create a Feature you must first go to the tab Feature Category. From there, click on the [Edit] link. The details are shown under Feature Categories - Edit Feature, below.

## .10.2 Feature Types

## .10.2.1 Table of existing Feature Types

### .10.2.1.1 EditFeatureTypes



| Description | Edit | Delete |
|---|---|---|
| Accessory | [Edit] | [Delete] |
| Amount | [Edit] | [Delete] |
| Net Weight | [Edit] | [Delete] |
| Artist | [Edit] | [Delete] |
| Billing Feature | [Edit] | [Delete] |
| Brand | [Edit] | [Delete] |
| Care | [Edit] | [Delete] |
| Color | [Edit] | [Delete] |
| Dimension | [Edit] | [Delete] |
| Fabric | [Edit] | [Delete] |
| Genre | [Edit] | [Delete] |
| Gift Wrap | [Edit] | [Delete] |
| Hardware Feature | [Edit] | [Delete] |
| Hazmat | [Edit] | [Delete] |
| License | [Edit] | [Delete] |
| Origin | [Edit] | [Delete] |
| Other Feature | [Edit] | [Delete] |
| Product Quality | [Edit] | [Delete] |
| Size | [Edit] | [Delete] |
| Software Feature | [Edit] | [Delete] |
| Style | [Edit] | [Delete] |
| Symptom | [Edit] | [Delete] |
| Topic | [Edit] | [Delete] |
| Type | [Edit] | [Delete] |
| Warranty | [Edit] | [Delete] |
| Equipment Class | [Edit] | [Delete] |
| Model Year | [Edit] | [Delete] |
| Year Made | [Edit] | [Delete] |



From this table, identify existing Product Feature Types; click the [Edit] link or the [Delete] button, as needed.

### .10.2.1.2 link buttons

[NewFeatureType] [Edit] [Delete] [Feature Type] [Feature Category] [Feature Group]

### .10.2.1.3 Description

Actually more useful as a one-word Name of the Feature Type.

### .10.2.1.4 Edit column

Click on the [Edit] link in this column to be taken to the EditFeatureType screen, discussed below.

### .10.2.1.5 Delete column

If you click on the [Delete] button, the Feature Type will be gone.

## .10.2.2 NewFeatureType or Edit links

Either click on [NewFeatureType] to create a new type, or click on the associated [Edit] button to bring up this tool.

When you click [Edit], the ID will already be populated.

## .10.2.2.1 EditFeatureType-new


Create a new Feature Type when you enter a new Type ID. Edit uses the same screen with the Type ID already populated.

## .10.2.2.2 link buttons

[Update] [Feature Types] [Feature Categories] [Feature Groups]

## .10.2.2.3 Product Feature Type ID

Should be short, but descriptive. Convention calls for ALL CAPS.

## .10.2.2.4 Parent Type ID (drop-down box)

If this Type is part of a family of Product Feature types, enter the Parent ID here from the drop-down screen.

## .10.2.2.5 Has Table (Y/N)

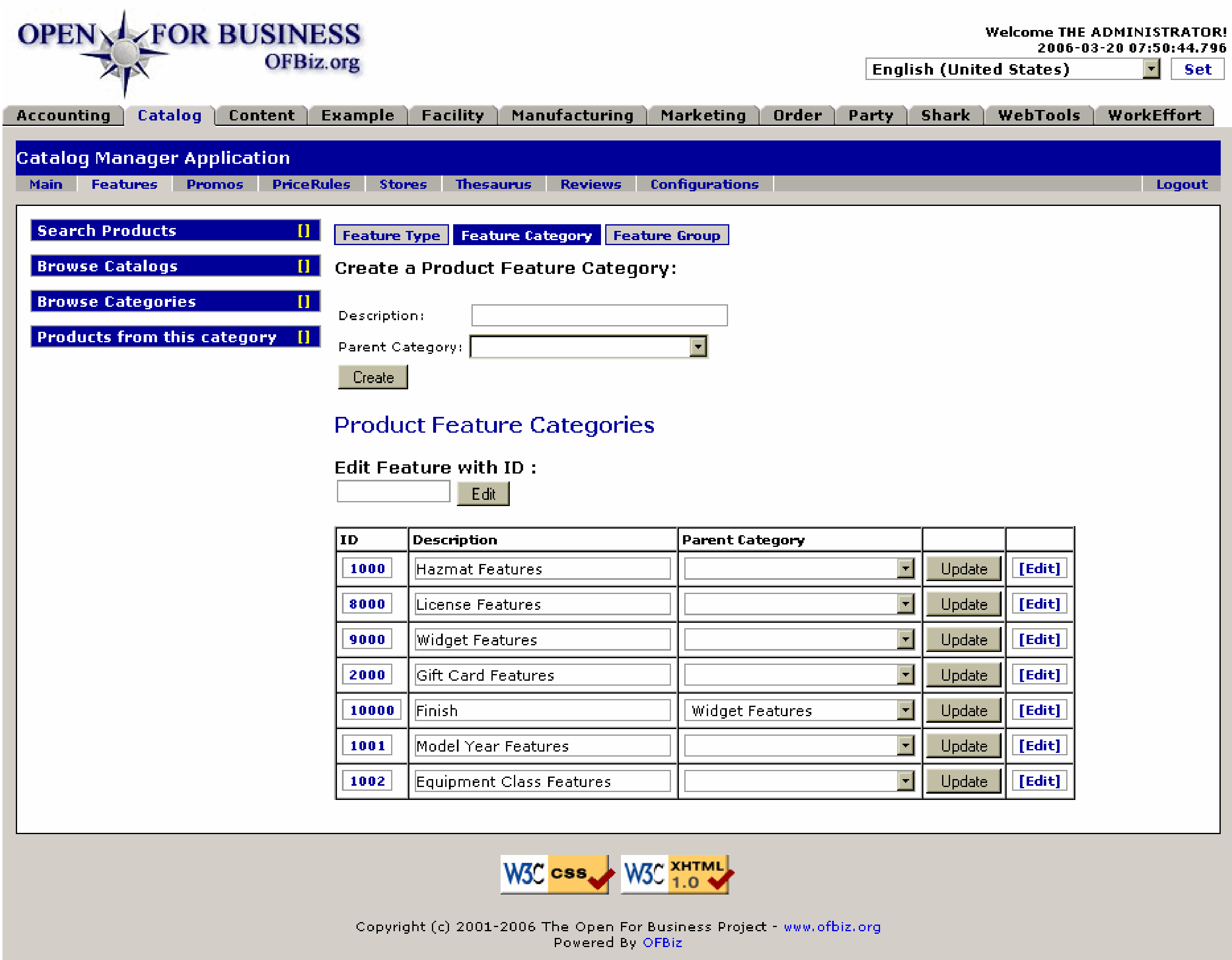
If there is an accompanying Table, select Y for Yes.

## .10.2.2.6 Description

This would be more like a name, but generally longer than the ID. This can be more descriptive.

# .10.3 Feature Categories

## .10.3.1 EditFeatureCategories




Opening screen under the Features tab. Click on the ID or [Edit] link to edit, or create a new Category with the tool at the top.

## .10.3.2 link buttons

[Edit] [Update] [Create] [Feature Type] [Feature Category] [Feature Group]

## .10.3.3 Create a Product Feature Category

Creating a new feature immediately adds it to the table of features in the opening screen.

### .10.3.3.1 Description

Enter a brief, unique descriptor or phrase, preferably less than 30 characters total, which will accompany the system-generated Feature Category ID number.

### .10.3.3.2 Parent Category (drop-down box)

If this is part of a group of features that is under the umbrella of a Parent Category, use the drop-down box to find and assign its Parent.

## .10.3.4 Edit Feature with ID:

### .10.3.4.1 Edit or Create - Discussion

When you enter an existing Feature ID # and select [Edit], you will be taken to the Edit Feature screen.If you click on [Edit] without having entered any number, you will reach the same screen but you can use it to create a new Feature. Note: This is different from the Edit Feature Categories screen. To edit the Feature Category, click on the ID number to the left in the table or on the [Edit] link to the right of the desired Feature Category.

### .10.3.4.2 Jump link

Enter the ID of an existing Feature and click [Edit] to go directly to the EditFeature screen, discussed further, below.

### .10.3.4.3 Table of Product Feature Categories

#### .10.3.4.3.1 ID

Click on this ID number to go to the EditFeature screen, below.

### .10.3.4.3.2 Description

Generally the Name of the category. If you wish to change only this, enter the changes here then click on the [Update] button.

### .10.3.4.3.3 Parent Category (drop-down box)

If this Product Category is the child of another, that is given here. If you change the Parent Category with the drop-down box, click on the [Update] link.

## .10.3.4.4 EditFeatureCategoryFeatures


Create new or identify to edit an existing Product Feature.

## .10.3.4.5 link buttons

[Update] [Create] [Create New Feature] [Feature Type] [Feature Category] [Feature Group]

## .10.3.4.6 Edit Features for Feature Category ...

### .10.3.4.6.1 Add / Create new features line

Enter how many new features you wish to create, then press the [Create] link.

## .10.3.4.7 Table of Product Feature Categories

### .10.3.4.7.1 ID

Click on this ID number to go to the EditFeature screen.Note: many of the items you can change here in this table, followed by clicking on the [Update] link.

### .10.3.4.7.2 Description

Actually used as the name for the feature is brief enough. This WILL appear in the catalog for the primary item as one of the selectable features.

### .10.3.4.7.3 Feature Type (drop-down box)

The originally assigned Feature Type appears here. This can be changed using the drop-down selection box.

### .10.3.4.7.4 Feature Category (drop-down box)

Originally assigned Category for this Feature is given. You can change this by making a different selection from the drop-down box.

### .10.3.4.7.5 Unit of Measure ID

If something other than 'Each,' the Unit of Measure should be given here.

### .10.3.4.7.6 Amount

How much of the Feature is included, when appropriate.

### .10.3.4.7.7 ID Seq Num

If a sequencing system is in place, the sequence for this Feature should be given here.

### .10.3.4.7.8 ID Code

An assigned Code to identify this Feature in transactions will be seen here.

### .10.3.4.7.9 Abbrev

If the Description is too long to be used for this Feature, an abbreviation might be developed; that can be recorded here.

## .10.3.4.8 Edit Feature screen

### .10.3.4.8.1 EditFeature


Come to this screen to edit the Feature. You can also find Supplier info and establish new Suppliers here.

### .10.3.4.8.2 link buttons

[Go to Feature Category ...] [Update] [Create] [Feature Type] [Feature Category] [Feature Group]

### .10.3.4.8.3 Edit Feature: ... section

#### .10.3.4.8.3.1 Feature ID

The system-assigned ID number for this Feature. As it says, 'This cannot be changed without re-creating the Product Catalog.' Actually that should say, '... without recreating the Category Feature.' You can change practically anything else about the Category Feature, either here or in the table at the previous screen.

#### .10.3.4.8.3.2 Feature Type (drop-down box)

Originally assigned Feature Type can be changed here with the drop-down box selections.

#### .10.3.4.8.3.3 Feature Category (drop-down box)

Originally assigned Feature Category can be changed here with the drop-down box selections.

#### .10.3.4.8.3.4 Description

Best kept short; this will appear in the Catalog and is often used in place of a name.

#### .10.3.4.8.3.5 Unit of Measure ID

If other than 'each,' the Unit of Measure goes here.

#### .10.3.4.8.3.6 Number / Quantity

How many are involved? That number or quantity goes here.

#### .10.3.4.8.3.7 Default Amount

The price for this Feature assuming it is not covered elsewhere as part of the Parent or in some other way.

#### .10.3.4.8.3.8 Default Sequence Number

If not overridden by a Parent's Sequence Number or some other sequencing system, this is the anticipated Sequence Number.

#### .10.3.4.8.3.9 ID Code

For transaction tracking, Features may be assigned an ID Code; enter that here.

#### .10.3.4.8.3.10 Abbreviation

If the description is too long, an abbreviation can be assigned to it here.

### .10.3.4.8.4 Supplier Specific Feature Information

#### .10.3.4.8.4.1 Table of Suppliers' data

Established Suppliers for this Category Feature can be viewed in the table. Changes can be made in the table if you will click the [Update] link in the RH column. Information is shown under these categories:

- Suppliers
- Description
- Currency
- ID Code

See explanations for these fields in the topics

#### .10.3.4.8.4.2 Create information for new supplier

##### .10.3.4.8.4.2.1 Suppliers (drop-down box)

A vendor able and willing to provide the components for the Category Feature. Must already be identified under the Party Manager.

##### .10.3.4.8.4.2.2 Description

What the Supplier calls the Category Feature it is going to provide.

##### .10.3.4.8.4.2.3 Currency (drop-down box)

The national currency to be used with this Supplier. Select from the drop-down box.

##### .10.3.4.8.4.2.4 ID Code

The ID Code for the Feature being obtained from this Supplier.

## .10.4 Feature Groups

The set of Product Feature Groups displayed here will be constrained by the specific Catalog, Categories and/or Products previously selected.

## .10.4.1 EditFeatureGroups


Product Feature Groups are created, updated and selected for editing from this screen.

## .10.4.2 link buttons

[Edit] [Update] [Create] [Feature Type] [Feature Category] [Feature Group]

## .10.4.3 Table of Groups

### .10.4.3.1 ID

Links to Edit Feature Group Applications screen.

### .10.4.3.2 Description

This Description of the Group can be changed here in the table. Click [Update] when finished.

## .10.4.4 Create a Product Feature Group

### .10.4.4.1 Description

Give the feature group a name here. When you click upon the [Create] button, the group is created in name and ID number only. Return to the table above and Edit the new group to establish details.

## .10.4.5 Edit Product Feature Group

### .10.4.5.1 EditFeatureGroupAppls


Contents of the Feature Group can be removed, applied or newly created from this screen.

### .10.4.5.2 link buttons

[Create] [Remove] [Continue][Feature Type] [Feature Category] [Feature Group]

## .10.4.5.3 Table of Feature Group Application IDs

### .10.4.5.3.1 ID

The identification number for this feature.

### .10.4.5.3.2 Feature

As originally entered as the description or name of the Feature.

### .10.4.5.3.3 Type

The type of a feature.

### .10.4.5.3.4 Category

The Category of features from which this was selected.

## .10.4.5.4 Quick Apply Product Feature

Enter the ID number of an existing Product Feature, such as 9003 for the 4-wheel Widget feature, and it will be applied after clicking on the [Create] link.

## .10.4.5.5 Apply Product Feature(s) From Category

### .10.4.5.5.1 Discussion

Select a Category from the Feature Category drop-down box, click on [Continue]. A table populated with the Features from that Category will appear. Select the desired Feature from the table and it will be applied to the Feature Group.When finished with the Category, click on the link [Finished w/ This Category] and you can select another Category from which to choose.

### .10.4.5.5.2 Continue

**Apply Product Feature(s) From Category:**

| ID | Type | Description | ID Code | Abbrev | |
|---|---|---|---|---|---|
| 1000 | Hazmat | Hazmat | Y | | Apply |
| 1001 | Hazmat | Non-Hazmat | N | | Apply |

[Finished w/ This Category]

When you click upon the Category, a table like this pops in; click [Apply] to incorporate into the Group.

# .11 Tab - Catalog Promos

## .11.1 FindProductPromo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Welcome THE ADMINISTRATOR!
2006-03-20 20:35:56.452
English (United States) Set

Accounting | Catalog | Content | Example | Facility | Manufacturing | Marketing | Order | Party | Shark | WebTools | WorkEffort

Catalog Manager Application

Main | Features | Promos | PriceRules | Stores | Thesaurus | Reviews | Configurations | Logout

Search Products []
Browse Catalogs []
Browse Categories []
Products from this category []

Product Promotions List

[Create New ProductPromo] [View Manual and Imported]

Promotion Code: Edit

| Promo Name [ID] | Promo Text | Req. Code? | Created | |
|---|---|---|---|---|
| Test X products for $Y [9015] | Buy 4 items for $50 from Purple Gizmo [GZ-5005], Rainbow Gizmo [GZ-1004], Round Gizmo [GZ-2644] or Square Gizmo [GZ-2002] limit 2 per customer | N | 2003-11-08 11:00:08.058 | [Edit] |
| Test buy X get Y at Z% discount [9014] | Buy 1 Big Gizmo [GZ-8544] or Massive Gizmo [GZ-7000] Get 1 Purple Gizmo [GZ-5005] At 50% off with promo code [9001] (must be associated with Party or Email), no limit | Y | 2003-11-08 10:43:54.765 | [Edit] |
| Test buy X get Y free [9013] | Buy 3 Get 2 Free in the Widgets [200] or any sub-category (except the Small Widgets [201] category and sub-categories, but always including the Micro Widgets [20111] category), limit to two per order | N | 2003-11-08 10:39:18.660 | [Edit] |
| Test amount off order [9012] | $10 off entire purchase of $50 or more with promo code [9000], limit use of code to one per customer, limit for three uses total for the code | Y | 2003-11-08 10:06:11.649 | [Edit] |
| Test percent off entire purchase, no condition [9011] | 10% off entire purchase | N | 2003-11-08 10:02:58.425 | [Edit] |
| Test Percent off product set [9010] | 20% off any one item, either GZ-1005 (.NIT Gizmo) or GZ-1006 (Open Gizmo) with a limit of 1 per order | N | 2003-11-08 09:22:25.104 | [Edit] |
| Test $ off products in categories [9016] | Get $500 off any item in the Small Gizmos [101] category, limit 1 per order, 2 per customer, 3 for entire promotion promotion. Discount not to exceed the price of the item. | N | 2003-11-07 17:02:56.034 | [Edit] |
| Test Percent off when Customer Orders over $1000 in 12 months [9019] | Spend more than $1000 in any 12 months on our fabulous Widgets and Gizmos and get a 5% discount. | N | 2001-05-13 12:00:00.000 | [Edit] |
| Test Gift with Total Amount of Product [9018] | Spend more than $150 on your favorite gizmos (all products in Gizmo [100] or sub-category) and get a free Open Gizmo! | N | 2001-05-13 12:00:00.000 | [Edit] |
| Test Gift with Amount of Specific Product [9017] | Buy $50 of your favorite gizmos (all products in Gizmo [100] or sub-category) get a free Open Gizmo! Limit 2 per order. | N | 2001-05-13 12:00:00.000 | [Edit] |
| Test Promo 1 [9000] | Spend more than $100 on your favorite widgets and gizmos and get a free Micro Chrome Widget! | N | 2001-05-13 12:00:00.000 | [Edit] |

W3C CSS W3C XHTML 1.0

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Table of existing Product Promotions; select from here to view or edit. Note links to both Promos and Products.

## .11.2 link buttons

[Create New ProductPromo] [View Manual and Imported (toggle)] [Edit]

## .11.3 Table of current promotions

### .11.3.1 Promo Name (ID)

Click on either the Name/ID combination here or on the [Edit] link to the right to be taken to the EditProductPromo screen for this promotion.

### .11.3.2 Promo Text

The explanation of the Promotion as it will appear on the ecommerce screens or the Order Entry screens of the Order Manager. Should be clear and complete enough for both your staff and your customers to understand.

### .11.3.3 Req. Code?

This Yes / No response indicates which flag is set. Does a Promotional Code need be entered before this Promotion can be effected for a customer? If Y, the customer will need to enter a Promotion Code to benefit from the Promotion.

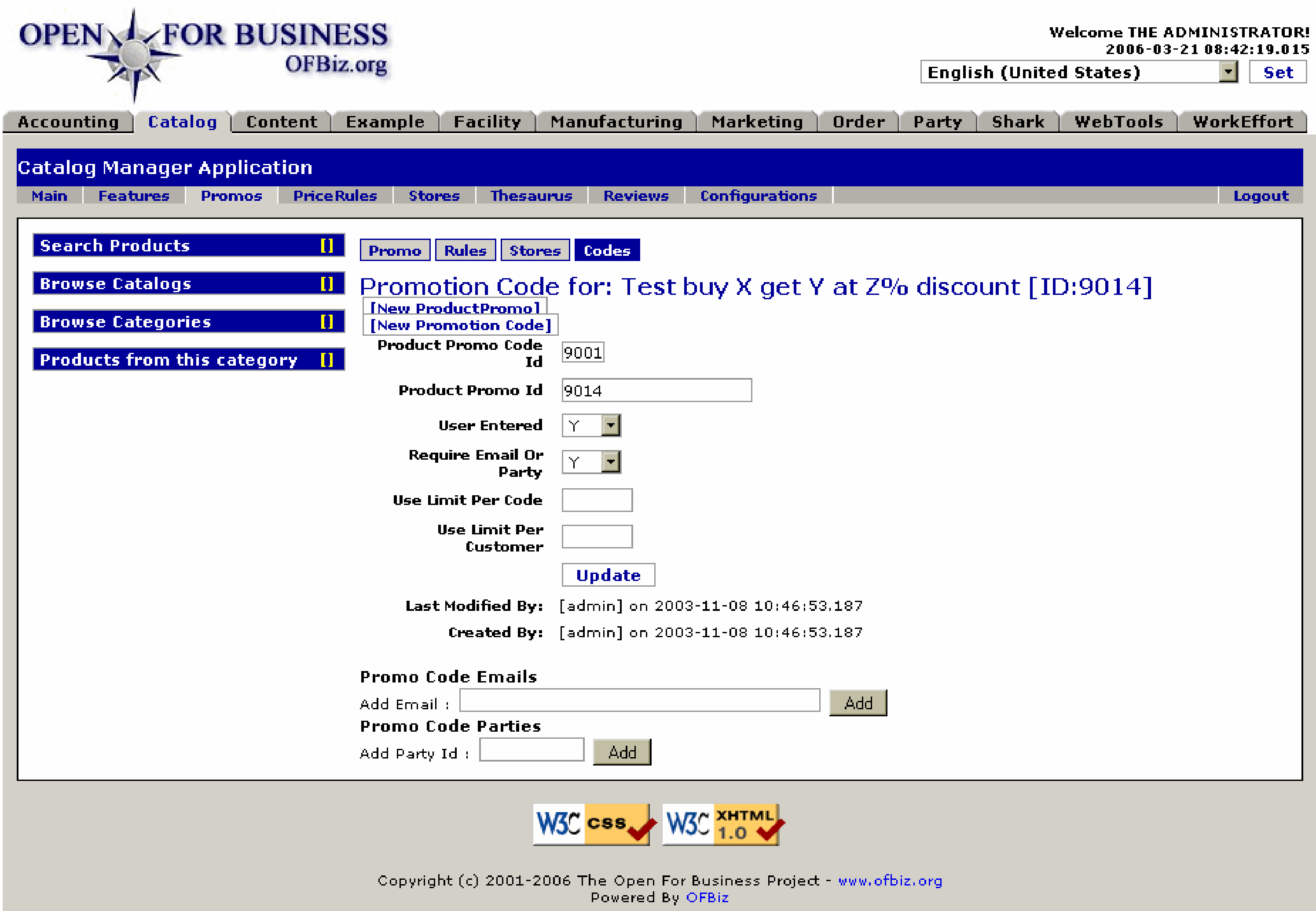
Otherwise, it could be automatically imposed if the criteria are met as set out in the text.

### .11.3.4 Created

Date and Time when the Promotion was created.NOTE: the examples which come with OFBiz are old but they can serve as examples. They can not be modified and used effectively in your installation. Create new promotions matching the characteristics that you might like from these examples.

## .11.4 Edit Promotion Code

### .11.4.1 PromotionCode-Edit




Enter a Promo Code in the upper LH corner of the opening screen and you are brought directly to the Codes tab. See below.

## .11.5 Editing tabs

Click on the Promo Name ID or the associated [Edit] link to see further details or to make changes to the promotion.

### .11.5.1 Edit Promotion

Links from [Edit] or from Promo Name [ID].

## .11.5.1.1 EditProductPromo


Edit the details of a selected Promotion from this screen and under the other tabs.

## .11.5.1.2 link buttons

[New Product Promo] [Update] [Promo] [Rules] [Stores] [Codes]

## .11.5.1.3 Product Promo ID

The ID number assigned by the system when this Promotion was created.

### .11.5.1.4 Promo Name

Name by which this Promotion is known within your organization. Will also be viewed by the ecommerce customer.

### .11.5.1.5 Promo Text

This is the text that appears on the ecommerce screen or the Order Entry screens of the Order Manager.

### .11.5.1.6 User Entered (Y/N)

Does the User have to enter this Promotion information? Meaning, does he have to place an order for a second product to take advantage of the promotion?

### .11.5.1.7 Show to Customer (Y/N)

Is the Promotion shown to the customer on the Product sheet or in the ecommerce pages?

### .11.5.1.8 Require Code (Y/N)

Does a Promotional Code need be entered before this Promotion can be effected for a customer?

### .11.5.1.9 Use Limit Per Order

Within one customer Order, how many instances may the customer have to use this Promotion?For example, if he get a free Micro Widget with the purchase of any kind of Gizmo, does he get one free with the purchase of each different Gizmo or just the first?

### .11.5.1.10 Use Limit Per Customer

How many times may a customer benefit from this Promotion?For example, if he gets a free Widget with this Order, then orders a Gizmo tomorrow, will he (as a Party ID) be allowed to get another or is this limited to 1 time or 4 times or how many?

### .11.5.1.11 Use Limit Per Promotion

How many promotional give-a-ways or discounts will be accepted for the life of this promotion?For example, if you are giving away free Widgets with the Purchase of Gizmos, and you have 100 Gizmos to sell but only 20 widgets to give away, you will need to enter '20' here, and state in the Promotion, 'First 20 sales only.'

### .11.5.1.12 Billback Factor

When the Promotion is underwritten or subsidized by a Supplier, the cost of the Promotion can be partly or fully covered by this source. Here is where the code to identify the Billiback is entered.

### .11.5.1.13 Last Modified By:

Includes title, date and time.

### .11.5.1.14 Created By

Party that originally created this Promotion.

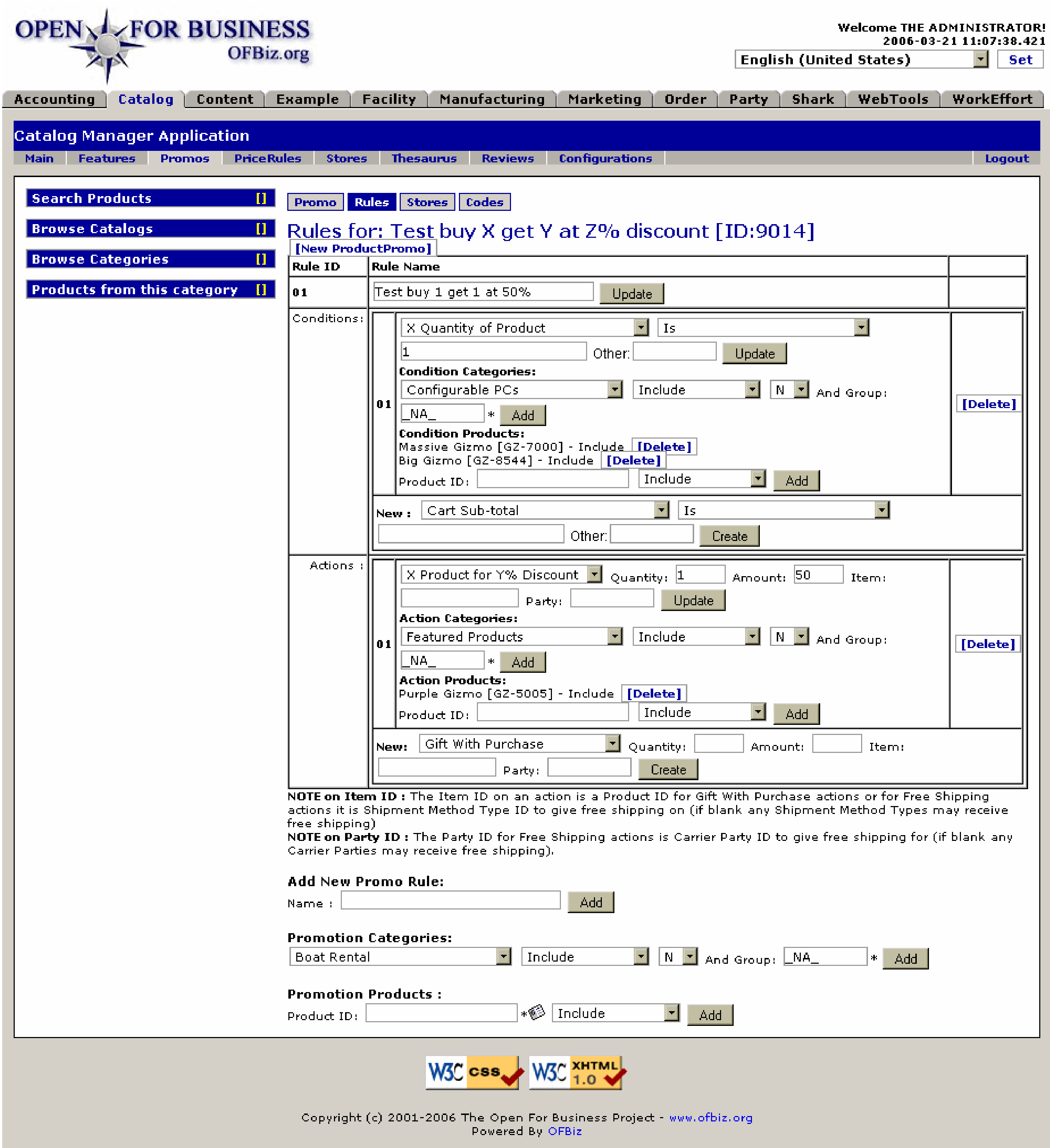
## .11.5.2 Edit Rules

Rules for the promotion. Powerful engine creates the relationships required to properly implement the Rules for processing the promised promotional discounts.

### .11.5.2.1 Rules discussion

Rules for promotions are used to determine what actions should be taken in the promotion. Each promotion can have multiple rules, and each rule can have multiple conditions and actions. If a promotion had multiple rules, they would all be checked in sequence, and the rules whose conditions were true will be activated. This is especially helpful for complicated promotions that have multiple offers.

## .11.5.2.2 EditProductPromoRules




Tool for establishing the Conditions and Actions for Promotions; add other features. Choices shown are only typical.

## .11.5.2.3 link buttons

[Update] [Add] [Create] [Delete] [New Product Promo] [Promo] [Rules] [Stores] [Codes]

## .11.5.2.4 Rule ID

Typically a 2-digit number, this is created by the system and cannot be changed.

## .11.5.2.5 Rule Name

How the Rule is known within the Promotion. This can be modified; click [Update] when finished.

## .11.5.2.6 Conditions

### .11.5.2.6.1 Relative values

If these values exist (as established in the drop-down boxes and the filled-in numbers), then the action will be considered, subject to the following Condition Categories.

### .11.5.2.6.2 Condition Categories (drop-down box)

Select a Condition Category from the drop-down box (if needed), specify whether to Include, Exclude, or Always Include from that drop-down box, confirming with a Y or N choice and naming the applicable Group. If there is no Group named (*NA*), then the Condition will not be applied.

### .11.5.2.6.3 Condition Products

If specific Products are to be Included, Excluded or Always Included, identify them here, and click on [Add].

### .11.5.2.6.4 New condition

Introduce a new Conditions rule here by selecting conditions, terms and values, then clicking [Create]. The Conditions sections will stack within this section of the Rule Name column, each with their own two-digit ID and Name; you can edit and add Products and Categories after the new Condition is created.

## .11.5.2.7 Actions

### .11.5.2.7.1 Relative terms

Who will benefit from this promotion is established in the first couple of lines here, using the drop-down box.

Then the value of the action is stated for Quantity, Item, Amount and/or Party.

#### .11.5.2.7.2 Action Categories

Select an Action Category from the drop-down box (if needed), specify whether to Include, Exclude, or Always Include from that Category, confirming with a Y or N choice and naming the applicable Group. If there is no Group named (*NA*), then the Action Category will not be applied in this Action.

#### .11.5.2.7.3 Action Products

If specific Products are to be Included, Excluded or Always Included, identify them here, and click on [Add].

#### .11.5.2.7.4 New Actions rule

Use the drop-down box to select type of action. Introduce a new Action item here by selecting Quantity, Items, Amount and Party, then clicking [Create]. The Actions sections will stack within this section of the Rule Name column, each with their own two-digit ID and Name; you can edit and add Products and Categories after the new Condition is created.

### .11.5.2.8 Add New Promo Rule

#### .11.5.2.8.1 Name:

Enter a name for the new Promotion rule, click [Add], and the table will include the new rule with spaces for editing as discussed above.

### .11.5.2.9 Promotion Categories

#### .11.5.2.9.1 Categories (drop-down box)

Any existing Promotion Category can be selected from the drop-down box.

#### .11.5.2.9.2 Include/Exclude (drop-down box)

Indicate whether the Promotion Category is to be Included, Excluded or Always Included in the new Rule.

#### .11.5.2.9.3 Yes/No (Y/N)

Confirm Yes or No.

#### .11.5.2.9.4 Group * (drop-down box)

Group must be named to add the Category; if *NA*, will not affect the Rule.

## .11.5.2.10 Promotion Products

### .11.5.2.10.1 Product ID * (popup search)

Product must be specified before it can be added. Use the popup search tool to locate.

### .11.5.2.10.2 Include/Exclude (drop-down box)

The named Product can be Included, Excluded or Always Included.

## .11.5.3 Stores (for promotion)

### .11.5.3.1 EditProductPromoStores


Assignment of the selected Promotion to Stores. Edit the duration of effectivity for the Stores. Delete if needed.

## .11.5.3.2 link buttons

[Update] [Add] [Delete] [New Product Promo] [Promo] [Rules] [Stores] [Codes]

## .11.5.3.3 Table of stores

### .11.5.3.3.1 Store Name (ID)

ID with link to Catalog - Stores tab, Store sub-tab for information and editing.

### .11.5.3.3.2 From Date and Time

When the Promotion was assigned to this Store or when it was made effective.

### .11.5.3.3.3 Thru Date/Time (popup calendar)

Expire an assignment to this Store by entering the expiration date here. If left blank, will remain indefinitely.

### .11.5.3.3.4 Sequence

If a sequencing system is in place, enter or edit the Sequence number here.

## .11.5.3.4 Add Store Promo

### .11.5.3.4.1 Store (drop-down box)

Select other Stores to be included with the Promotion from the drop-down box.

### .11.5.3.4.2 Optional From Date (popup calendar)

Date will default to Now unless a future date is selected.

## .11.5.4 Codes

### .11.5.4.1 FindProductPromoCode


Identify Promotion Codes for the selected Promotion; click Code to edit. May also add a set of Promotion Codes from this screen.

### .11.5.4.2 link buttons

[New Product Promo] [New Promotion Code] [View Manual and Automatic] [Edit] [Delete] [Add][Promo] [Rules]

### .11.5.4.3 Table of existing Promotion Codes

#### .11.5.4.3.1 Code

The Code number assigned by the system when it was created.

#### .11.5.4.3.2 Per Code

How many instances of sales can this Code be used? If tied with a Product, you should not exceed the amount of inventory or include a notice that the Promo applies to the first X number of sales only.

### .11.5.4.3.3 Per Customer

How many times can the customer use this Promotion Code?

### .11.5.4.3.4 Req. Email or Party

If the 'Require Email or Party' flag is set to N (No), any email addresses or parties listed will be ignored. To require an email address or party from these lists, set the flag to Y (Yes).

### .11.5.4.3.5 Created

Date this Promotion Code was created or made effective.

## .11.5.4.4 Add Set of Promotion Codes

### .11.5.4.4.1 Quantity

How many new Codes do you wish to add?

### .11.5.4.4.2 Use Limits Per Code

How many times can the new Code be used before it is exhausted?

### .11.5.4.4.3 Use Limits Per Customer

How many times can one customer use the Promotion Code?

## .11.5.4.5 Edit Promotion Code

### .11.5.4.5.1 EditProductPromoCode


Edit the Promotion Code and add details from this screen. Click [X] to remove party.

### .11.5.4.5.2 link buttons

[New ProductPromo] [New Promotion Code] [Add] [Update] [Promo] [Rules] [Stores] [Codes]

### .11.5.4.5.3 Product Promo Code ID

A promotion or coupon code which a shopper can use. This number is created by the system and cannot be changed.

### .11.5.4.5.4 Product Promo ID

The ID code of the promotion for which this code is applicable.

### .11.5.4.5.5 User Entered (Y/N)

Specifies whether this was a user entered promotion or, if N, implies it was an automatically created promotion code. This is to help when there are a lot of auto-generated codes that you don't want to have to see when manually maintaining codes.

### .11.5.4.5.6 Require Email or Party (Y/N)

Determines if the user needs to be on a specific list of email addresses of party identification numbers to be able to use the promotion code. At the bottom of the page are lists of active email addresses and party IDs and spaces for entering email addresses and party IDs. Clicking on the 'X' next to an email address or party ID removes it from the promotion.

### .11.5.4.5.7 Use Limit Per Code

Controls the number of times the given coupon code can be used. Limited stock or controlled distribution of coupons would drive this restriction.

### .11.5.4.5.8 Use Limit Per Customer

Controls the number of times the given coupon code can be used by a specific Party ID.

### .11.5.4.5.9 Last Modified by

Last Modified by Name on Date at Time.

### .11.5.4.5.10 Created by

Created by Name on Date at Time.

### .11.5.4.5.11 Promo Code Emails

#### .11.5.4.5.11.1 Existing email list

Not shown unless they exist.

#### .11.5.4.5.11.2 Add Email:

Enter an email address and press [Add].

### .11.5.4.5.12 Promo Code Parties

#### .11.5.4.5.12.1 Existing code parties

Not shown unless they exist.

#### .11.5.4.5.12.2 Add Party ID:

Enter a Party ID to identify those Parties associated with this Promotion Code.

## .11.6 Create New Product Promo

### .11.6.1 EditProductPromo-New


Create a new Product Promotion starting with this screen. The Promotion ID is generated by the system. Next, Edit the Code.

### .11.6.2 link buttons

[Update]

### .11.6.3 Promo Name

The Name is independent of the assigned Promo ID and can be used over and over. This will appear on the ecommerce site and the product order webscreen. Needs to be succinct yet descriptive.

### .11.6.4 Promo Text

What is said on the Product Page or in the ecommerce presentation screens about this Promotion.

### .11.6.5 User Entered (Y/N)

A way to flag promotions as 'user entered' for cases where automated promotions are used. When promotions are listed by default it doesn't show promotions where User Entered is N unless they click on the link to show all promotions.

### .11.6.6 Show To Customer (Y/N)

Controls whether this will be shown to customers automatically when they are viewing their shopping cart or checking out, or whether this promotion is kept hidden and requires the customer to find out about it some other way.

### .11.6.7 Require Code (Y/N)

Denotes whether the promotion requires the use of a special coupon code or is applicable to any user who qualifies under its rules.

### .11.6.8 Use Limit Per Order

These boxes allow you to specify how many times the promotion can be used, either per order, customer, or promotion. You can specify how many times the promotion can be applied, either for a specific order, specific customer, or for the life the promotion. Be sure to specify at least one of these. Otherwise, Open for Business will keep applying the promotion without limits on the same order.

### .11.6.9 Use Limit Per Customer

How many times may a customer benefit from this Promotion?For example, if he gets a free Widget with this Order, then orders a Gizmo tomorrow, will he (as a Party ID) be allowed to get another or is this limited to 1 time or 4 times or how many?

## .11.6.10 Use Limit Per Promotion

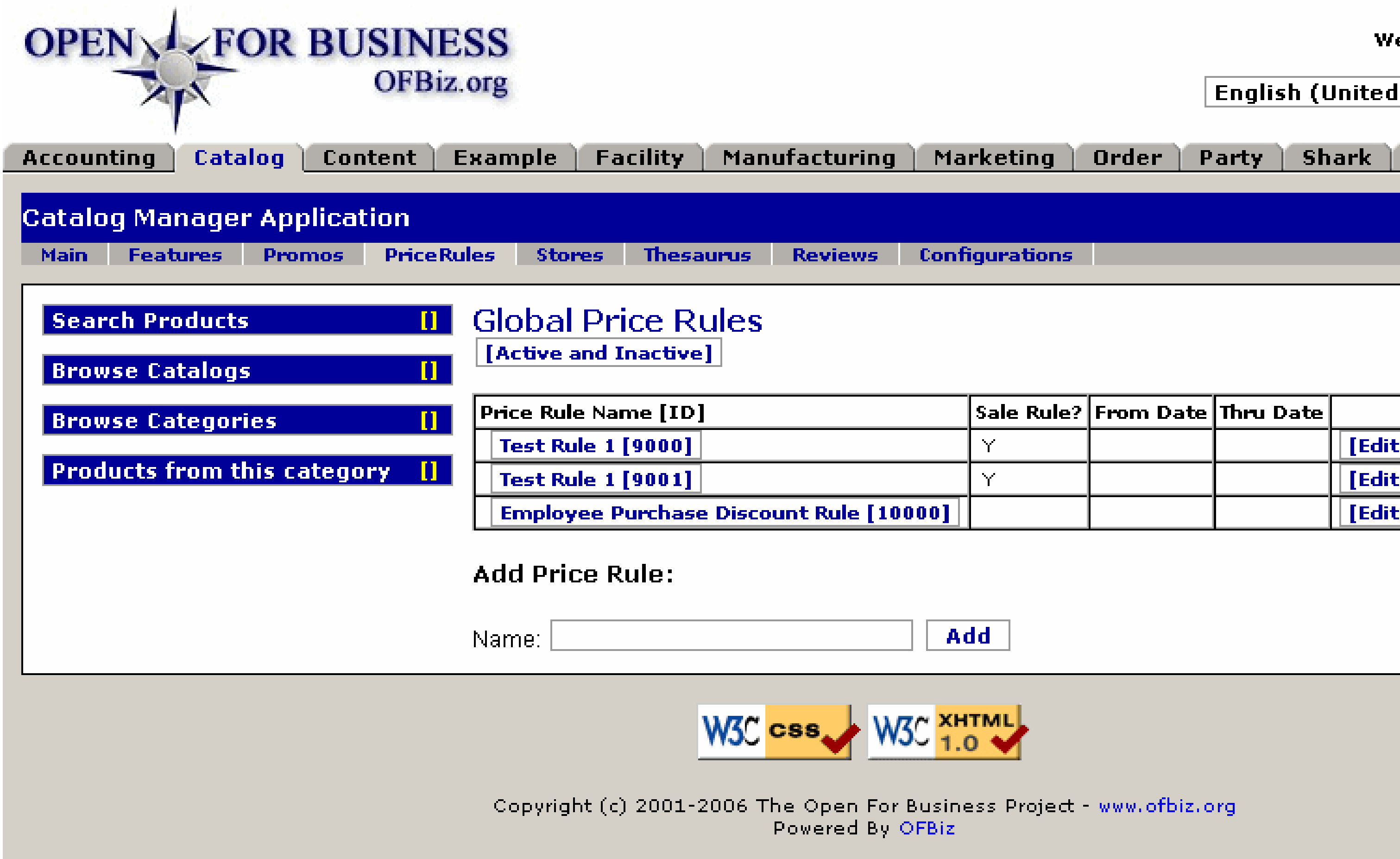
How many instances of this Promotion are allowable? If this is a flat discount, for example, there probably needs not be a limit during the run of the Promotion. On the other hand, if there is a give-away item, the instances should be limited to the number of such items on hand.

## .11.6.11 Billback Factor

Used to track how much of the discount offered for the promotion should be billed back to the manufacturer or distributor that is sponsoring or underwriting the promotion.

## .12 Tab - Catalog PriceRules

### .12.1 FindProductPriceRules




Select a Global Price Rule to edit from this table, or add a new Price Rule with the tool.

### .12.2 link buttons

[Active and Inactive (toggle)] [Edit] [Add]

### .12.3 General discussion

Price Rules tab can be seen on the top nav bar. If you select the example 'test rule', this rule sets all items in the promotions category 20% off the list price and marks the item as 'On Sale!'Each rule consists of a set of conditions and a set of actions. The actions only run if all conditions evaluate as true.There are many options for conditions.

The conditions will limit which products and which people get which prices so, if I wanted to give 'admin' 50% off all items in promotions, I would create a new PriceRule and then set the conditions to be that Party = Admin and update it and then set

Percent of List Price to -50. Don't forget the minus sign.

## .12.3.1 Processes

### .12.3.1.1 Cookie

The cookie remembers users so when that, when they return their prices are already established even before they login. Without the cookie they are not 'known' so they do not qualify for the discount, but rather get the default price.

### .12.3.1.2 Conditions

The conditions can be as general as which website they are on, or as detailed as which product we are working with. There are several different actions which can be used, but all of them are applied, in order (sequentially), so it can be a little dangerous.

### .12.3.1.3 Flat Amount Modify

Flat amount modify will modify the list price (all the modifiers modify the List Price) by a dollar amount. If you try this: put in '-20' this would give 20.00 off the list price. Notice the minus sign - without it the rule would raise the price by 20.00. Flat amount override will change the price to the amount in the box.

### .12.3.1.4 Comparing 'Override' and 'Modify'

The difference between override and modify is that override will set the price to the value in the box, modify will alter the price by the amount in the box. Override 20 would make the price exactly 20.00; modify -20 would take 20.00 off the list price.

# .12.4 Table of existing Price Rules

Either the ID or the Edit choice takes you to the Edit Global Price Rule work page.

## .12.4.1 Price Rule Name and ID

You have assigned the Rule Name, but the system assigns the ID. Click on the combination in this column or click on the [Edit] link to go to the Edit screen where you can change the name if you wish.

## .12.4.2 Sale Rule?

Is this a Sale Rule? Yes or No.

### .12.4.3 From Date

This could be either the date of creation or the date of effectivity of this Price Rule. Optional, so may be blank.

### .12.4.4 Thru Date

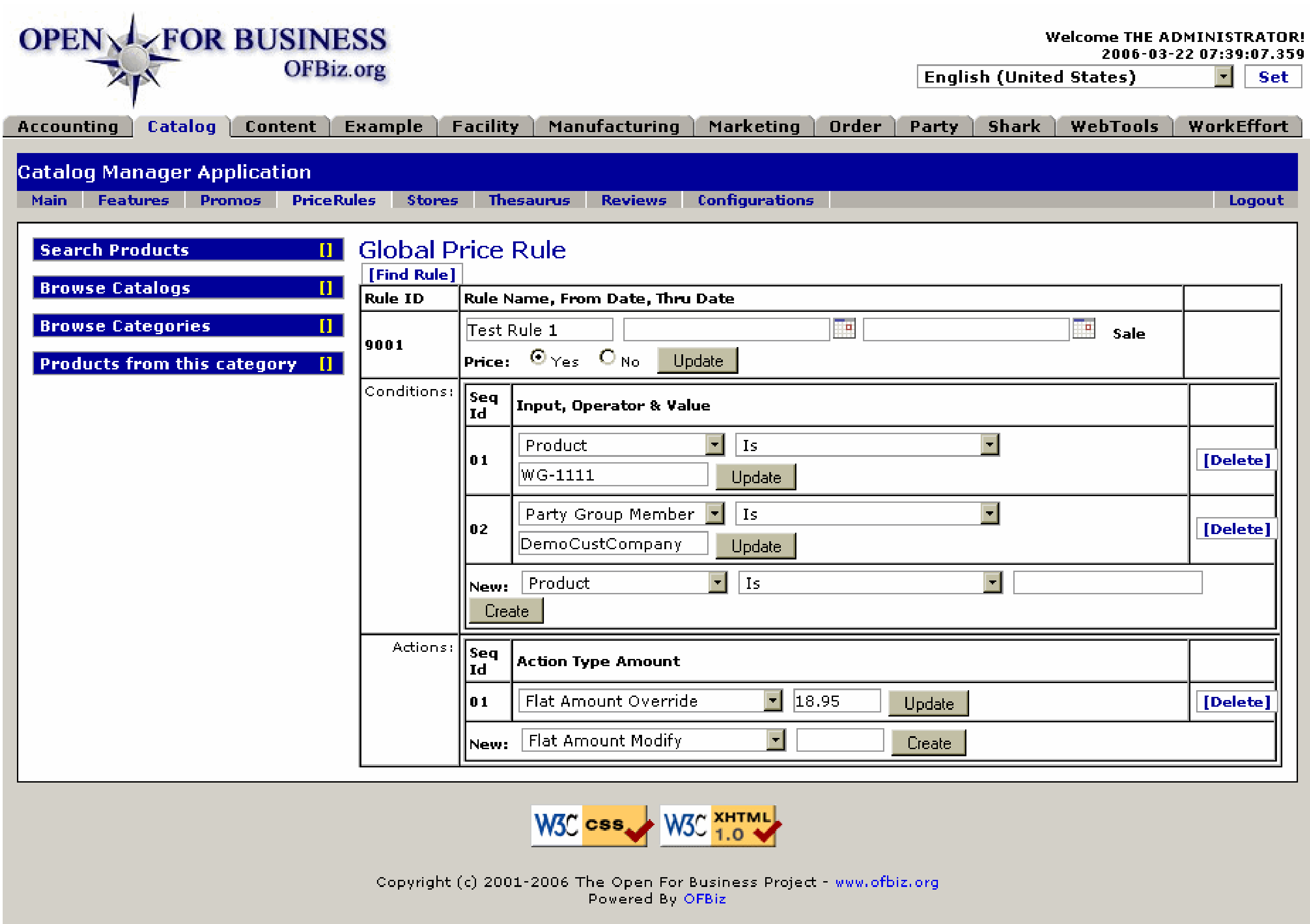
If present, the date when this Price Rule expires.

## .12.5 Add a Price Rule

Key in the name and click on [Add]. The new Rule will now appear in the Table. Click on the new ID or [Edit] to go to the edit screen, discussed below.

## .12.6 Edit Global Price Rule

### .12.6.1 EditProductPriceRules




Edit the Global Price Rule for name, effective date, conditions and actions at this screen. Click [Update] after changes.

### .12.6.2 link buttons

[Find Rule] [Create] [Update] [Delete]

### .12.6.3 Rule ID

The system-generated ID number which tracks this Rule. Cannot be changed.

### .12.6.4 Rule Name

You can assign or edit this name.

### .12.6.5 From Date (popup calendar)

Optional. If present, Rule will not be effective until this date is reached.

### .12.6.6 Thru Date (popup calendar)

Optional. If given, Price Rule will expire at this date and time.

### .12.6.7 Sale Price (Y/N)

Does this affect the Sales Price?

### .12.6.8 Conditions

#### .12.6.8.1 Seq. ID

This number reflects the sequence the conditions were created, so you should progress the conditions from the universal to the specific.

#### .12.6.8.2 Input (drop-down box)

Choices for input from this list include:

- Product
- Product Category
- Product Catalog
- Product Store Group
- Website
- Quantity
- Party
- Party Group Member
- Party Classification
- Role Type
- List Price

- Currency UOM ID

### .12.6.8.3 Operator (drop-down box)

Choices of operator include:

- Is
- Is Not
- Is Less Than
- Is Less Than or Equal To
- Is Greater Than
- Is Greater Than or Equal To

### .12.6.8.4 Value

Enter the ID of the Party, Group, Product, etc., whatever is being operated upon to create the Condition.

### .12.6.8.5 New Condition sequence rule

To create a new Conditions sequence rule, select Input, Operator and Value here; click on [Create] and the new Condition will appear in the table with a different Seq. ID.

## .12.6.9 Actions

### .12.6.9.1 Seq ID

These Sequence numbers are assigned as they are created.

### .12.6.9.2 Action Type (drop-down box)

Select from the drop-down list. The choices offered are discussed below.

### .12.6.9.3 Amount

If the Amount is to be a percentage discount, use a negative sign [-] in front of the units.

## .12.6.9.4 New Action sequence rule

To create a new Action sequence rule, select type and enter values here; click on [Create] and the new Action will appear in the table with a different Seq. ID.

## .12.6.9.5 Actions Discussion

Once the conditions are met, the actions are what determine the final price of the product. You can specify any of the following actions:

### .12.6.9.5.1 Flat Amount Modify

Modify the price by a flat amount.

### .12.6.9.5.2 Flat Amount Override

Regardless of the established price, override it with the Amount given here.

### .12.6.9.5.3 Percent of Average Cost

Take the assigned percentage times the established Average Cost. For example, if you wanted to have 100 percent margin over the Average Cost, enter 200 for the value.

### .12.6.9.5.4 Percent of Default Price

Generally the same as the List Price, the Default Price is the one assigned in the absence of other calls. In this case, the Price Rule calls for a percentage of the Default Price.

### .12.6.9.5.5 Percent of List Price

Assign a percent against the established List Price.

### .12.6.9.5.6 Percent of Margin

This refers to List Price - Average Cost. Some companies like to do margin based pricing and not just list or cost based pricing; this makes such possible.

### .12.6.9.5.7 Promo Amount Override

Use the 'Promotional Price' for this item as fixed amount, overriding all other price actions; this is not an adjustment of any existing price but rather a replacement of that price.

### .12.6.9.5.8 Wholesale Amount Override

Charge only the Wholesale Price, whatever that might be.

### .12.6.9.5.9 Multiple actions

When multiple actions are specified, all the actions will be run and the final price determined from that. If there is a Flat Amount or Promotional Amount override, however, these will be used to obtain the final price, and all other actions will be ignored.

# .13 Tab - Catalog Stores

## .13.1 FindProductStore


Table of existing Product Stores. Click on the Store Name-[ID] link or on the [Edit] button to view, edit, or access the sub-tabs.

## .13.2 link buttons

[Create New Product Store] [Edit]

## .13.3 Product Store table

Select a store and you are taken to the first tab of the Store Edit/Creation page. From there you can edit the details of the selected store, or choose one of the other tabs as detailed below.

### .13.3.1 Store Name

Click on the Store Name-ID link to edit the Store.

### .13.3.2 Title

This is what is presented to your customers as the 'Name' of your store or business.

### .13.3.3 Sub-Title

This would be like a motto, slogan, or marketing phrase to help your customers have a 'feel' for your business.

## .13.4 Store

### .13.4.1 Discussion

A 'Store' is not a building with signs, windows, shelves and people selling things. Today it is an organized effort to achieve a business objective. The Name is part of its identity; products and/or services are offered; various functions are performed to assemble, present, and deliver those goods and services.

With Open For Business, you can maintain several different Stores, each with their unique Identity and Purpose, which may share many of the resources (people, products, physical addresses, etc.) and monitor the operation within this one suite of applications.

In this Application (Store Manager) you specify the details of the operating entity - The Store.Entries made in this section are reflected in many critical operations within other Managers. For example, choices indicated on the following screen are important in the operation of the Catalog Manager, The Order Manager, the Manufacturing Manager, and the Accounting Manager. In turn, data and choices maintained in the Party Manager, the Content Manager, and the Facility Manager are called upon from this Application to perform its functions. You will return to this section frequently as you setup and maintain your businesses to adjust, fine tune and improve your operation.

You might consider this to be the Staff for the Chief Operations Officer!

### .13.4.2 EditProductStore

OPEN FOR BUSINESS OFBiz.org

Welcome THE ADMINISTRATOR!
2006-03-22 15:01:10.218
English (United States) | Set

Accounting | Catalog | Content | Example | Facility | Manufacturing | Marketing | Order | Party | Shark | WebTools | WorkEffort

Catalog Manager Application

Main | Features | Promos | PriceRules | Stores | Thesaurus | Reviews | Configurations | Logout

Search Products []
Browse Catalogs []
Browse Categories []
Products from this category []

Store | Roles | Promos | Catalogs | Web Sites | Shipping | Payments | Emails | Surveys | Override | Segments

## Store For: OFBiz E-Commerce Store [ID:9000]

New Product Store

| | |
|---|---|
| Primary Store Group Id | |
| Store Name | OFBiz E-Commerce Store |
| Company Name | Open For Business |
| Title | Open For Commerce |
| Subtitle | Part of the Open For Business Family of Open Source Software |
| Pay To Party Id | Company |
| Days To Cancel Non Pay | 30 |
| Manual Auth Is Capture | N |
| Prorate Shipping | Y |
| View Cart On Add | N |
| Auto Save Cart | N |
| Auto Approve Reviews | N |
| Is Demo Store | Y |
| Is Immediately Fulfilled | N |
| Inventory Facility Id | Web Store Warehouse [WebStoreWarehouse] |
| One Inventory Facility | Y |
| Check Inventory | Y |
| Reserve Inventory | Y |
| Reserve Order Enum Id | FIFO Received |
| Require Inventory | N |
| Requirement Method Enum Id | |
| Order Number Prefix | WS |
| Default Locale String | en_US |
| Default Currency Uom Id | USD |
| Default Sales Channel Enum Id | WEB_SALES_CHANNEL |
| Allow Password | Y |
| Default Password | |
| Explode Order Items | N |
| Check Gc Balance | N |
| Retry Failed Auths | Y |
| Header Approved Status | Approved [APPROVED] |
| Item Approved Status | Approved [APPROVED] |
| Digital Item Approved Status | Approved [APPROVED] |
| Header Declined Status | Rejected [REJECTED] |
| Item Declined Status | Rejected [REJECTED] |
| Header Cancel Status | Cancelled [CANCELLED] |
| Item Cancel Status | Cancelled [CANCELLED] |
| Auth Declined Message | There has been a problem with your method of payment. Please |
| Auth Fraud Message | Your order has been rejected and your account has been disable |
| Auth Error Message | Problem connecting to payment processor; we will continue to re |
| Style Sheet | /images/ecommain.css |
| Header Logo | /images/ofbiz_logo.jpg |
| Header Middle Background | |
| Header Right Background | |
| Use Primary Email Username | N |
| Require Customer Role | N |
| Auto Invoice Digital Items | Y |
| Show Checkout Gift Options | Y |
| Select Payment Type Per Item | N |
| Show Prices With Vat Tax | N |
| Show Tax Is Exempt | Y |
| Vat Tax Auth Geo Id | |
| Vat Tax Auth Party Id | |
| Enable Digital Product Upload | N |
| Dig Prod Upload Category Id | |

Edit Facility WebStoreWarehouse

Update



Enter (or change) details about your Store. This screen can also be a working checklist to help you create your own Store.

### .13.4.3 link buttons

[New Product Store] [Update] [Edit Facility ...][Store] [Roles] [Promos] [Catalogs] [Web Sites] [Shipping][Payments] [Emails] [Surveys] [Override] [Segments]

### .13.4.4 Store for: ... (ID...)

This is the Name and Product Store ID assigned by the application when the Product Store was created. It cannot be changed here.

### .13.4.5 Primary Store Group ID

What group this store belongs to. As mentioned in the section above on pricing, stores can be grouped together with a price for each store group. It can be left blank if there are no store groups set up. Store groups cannot be set up in the catalog manager and must be inserted directly into the database.

### .13.4.6 Store Name

This is the name of the store that this catalog represents.

### .13.4.7 Company Name

This is the name as you want it to appear on the display.

### .13.4.8 Title

This is the theme name as you want it to appear on the display.

### .13.4.9 Subtitle

This is the strapline for the display.

### .13.4.10 Pay To Party ID

A party (see Party Manager) where store payments will be credited to.

## .13.4.11 Days to Cancel Non Pay

Triggers cancellation for non-payment after number of days entered here. There is an automated service that can be scheduled (see Job Scheduler in Webtools) nightly to cancel orders which have not been paid. This defines how many days an order can be outstanding and unpaid before it is canceled. A value of zero here will leave all orders open indefinitely.

## .13.4.12 Manual Auth Is Capture (Y/N)

Drop-down Y/N box on the question of whether a Manual Authorization is captured.

## .13.4.13 Prorate Shipping (Y/N)

When some share of the cost of shipping is covered under an account other than the bill-to.

## .13.4.14 View Cart on Add (Y/N)

Controls whether the user is taken to the shopping cart immediately after adding a product to his cart.

## .13.4.15 Auto Save Cart (Y/N)

Drop-down Y/N box on the question of automatically saving the contents of the shopping cart.

## .13.4.16 Auto Approve Reviews (Y/N)

If the site allows users to enter product reviews, this controls whether the reviews must be approved (see 'Product reviews' below), or whether they are automatically shown on the site.

## .13.4.17 Is Demo Store (Y/N)

Drop-down Y/N box on the question of whether this is a Demonstration store (Y) or a working business (N). When operating as a business, you will want this to say Yes. For a training setup, by choosing No, any orders created will not be sent, credit card charges will not be made, etc.

## .13.4.18 Is Immediately Fulfilled (Y/N)

Drop-down Y/N box on the question of whether an order is immediately fulfilled through system-generated processes in the Warehouse, Accounting, Shipping, Inventory and/or other segments of the business. If the fulfillment process is held for a manual or credit review and approval of the order first, this answer should be No. In fact, the only likely time this would be set to Yes is for a POS operation (Point Of Sale) where the item is only sold off the shelf and handed directly to the customer or the customer 'shops' the store then pays at a checkout station.

## .13.4.19 Inventory Facility ID (drop-down box)

This is where the stock levels are drawn from. Used for knowing where to change product inventory as items are sold. See the 'Facility Manager' to create a facility. All existing facilities are presented here.

## .13.4.20 One Inventory Facility (Y/N)

If this is a 'Single Inventory' facility, set to Y for yes. With newer or less complex businesses, you will find the Single Inventory concept much easier to work with.

## .13.4.21 Check Inventory (Y/N)

This determines whether the system checks inventory levels when processing an order. If inventory IS checked (Y), the item cannot be ordered or rather the order cannot be fulfilled if there is insufficient QOH or ATP. If Inventory is not checked, however, the order may be accepted but items not available will be processed as a back-order. You need a system in place to track, replenish and fulfill back-ordered items if you set this flag to N.

## .13.4.22 Reserve Inventory (Y/N)

Causes inventory to be reserved for items ordered in the store. The inventory may still be on hand but will no longer be available for other orders.

## .13.4.23 Reserve Order Enum ID (drop-down box)

Choose how inventory should be reserved: FIFO, LIFO.

## .13.4.24 Require Inventory (Y/N)

If sufficient inventory not on hand, order will not be processed when this flag is set to Yes.

## .13.4.25 Requirement Method Enum ID (drop-down box)

Select from these choices on the drop-down list: FIFO ExpireFIFO ReceivedGreater Unit Cost LIFO ExpireLIFO ReceivedLess Unit Cost

### .13.4.26 Order Number Prefix

All orders will be prefixed by this. For example, if you wished accounting to be able to quickly differentiate orders between stores, each store could have a prefix affixed such as DENxxxxx, NYxxxxx, LAxxxxxx, etc.

### .13.4.27 Default Locale String

Default locale, for language, number, and currency formats.

### .13.4.28 Default Currency Uom ID

Which national currency will be used if none is specified. Use webtools to find codes for non-US locations.

### .13.4.29 Default Sales Channel Enum ID

Unless the sales channel has been specified in the transaction, it will be assumed that the sale came in through the selected path. Be sure to enter this correctly, exactly as it is recognized by the system.

### .13.4.30 Allow Password (Y/N)

Defaults to Y (Yes), if N (No) then when a customer creates an account they will not be asked for a password and they have to wait for their account to be enabled and a password to be sent to them.

### .13.4.31 Default Password

If you allow others access with a password, what is the default password that anyone could use if they knew it?

### .13.4.32 Explode Order Items (Y/N)

Defaults to N, if set to Y then any shopping cart item with a quantity greater than one will be split into separate order items with a quantity of 1 each.

### .13.4.33 Check Gc Balance (Y/N)

### .13.4.34 Retry Failed Auths (Y/N)

How many times can an unsuccessful attempt to authorize an order be allowed?

### .13.4.35 Header Approved Status

This is the message you want your customers to see when their order is approved.

### .13.4.36 Item Approved Status

What to set order items status to when orders are approved, declined, or canceled. Based on the standard defined status codes in Open for Business.

### .13.4.37 Digital Item Approved Status

What to set order items status to when Digital Item orders are approved, declined, or canceled. Based on the standard defined status codes in Open for Business.

### .13.4.38 Header Declined Status

This is the message you want your customers to see when their order is declined. Based on the standard defined status codes in Open for Business.

### .13.4.39 Item Declined Status

This is the message you want the customer to see when one of their items is declined for some reason.

### .13.4.40 Header Cancel Status

This is the message that you want the client to see when their order is cancelled.

### .13.4.41 Item Cancel Status

The message shown when an item they ordered is cancelled.

### .13.4.42 Auth Declined Message

Message shown when payment authorization is declined.

## .13.4.43 Auth Fraud Message

Message sent when fraud is suspected.

## .13.4.44 Auth Error Message

Message sent when a processing error is encountered.

## .13.4.45 Style Sheet

For controlling the look and feel and a web-based store. You can define the stylesheet (CSS) and images for the store here.

## .13.4.46 Header Logo

This is the logo that the store uses and is the company logo for headed displays (stationary, web pages etc.,).

## .13.4.47 Header Middle Background

URI pathway to content for the display presented to the right of the Header, will be placed in the middle background of the screen.

## .13.4.48 Header Right Background

URI pathway to content for the display presented to the far right of the Header, will be placed in the right-side background of the screen.

## .13.4.49 Use Primary Email Username (Y/N)

Defaults to N; if set to Y then in the create customer form no entry box will be presented for a username and the primary email address will be used for that. If set to N, the default, there is a checkbox a user can select to use the email address as a username, but they also have the option of entering a username.

## .13.4.50 Require Customer Role (Y/N)

Defaults to N; if set to Y then the customer must be associated with the store in the Customer role in order to be able to login. If they are not associated with the store in the Customer role, they will receive an error message when they try to login. Note that this means entering an assignment of Customer as Role for every customer that wants to by.

This could delay them from being able to make purchases. It also means giving attention to every prospect until they become identified as a Customer.

## .13.4.51 Auto Invoice Digital Items (Y/N)

Default to Y meaning that digital items will be immediately invoiced when the order is placed rather than waiting for some sort of fulfillment process to set the item status to complete which would then trigger the invoice creation.

## .13.4.52 Show Checkout Gift Options (Y/N)

This defaults to Y; if set to N the options related to gifts (the 'is gift' and 'gift message' options) will not be shown during checkout. This is meant for use in business oriented stores or others where the gift options do not make sense.

## .13.4.53 Select Payment Type Per Item (Y/N)

Defaults to N; if Yes, allows customer to pay for some order items with one payment type, others with another type.

## .13.4.54 Show Prices With Vat Tax (Y/N)

Should the displayed prices include (Y) or not include (N) the VAT Tax amount?

## .13.4.55 Show Tax Is Exempt (Y/N)

Will it be appropriate to indicate when an item is exempt from tax?

## .13.4.56 Vat Tax Auth Geo ID (popup search tool)

What is the Geographical ID for the VAT taxing authority? Use the popup search tool to identify.

## .13.4.57 Vat Tax Auth Party ID (popup search tool)

What is the Party ID of the Vat Taxing Authority? Use the popup search tool to identify.

## .13.4.58 Enable Digital Product Upload (Y/N)

Unless this is set to Yes, the sale of Digital Products from your Store will not be permitted.

## .13.4.59 Dig Prod Upload Category Id (popup search tool)

Which Category of Digital Products may be uploaded?

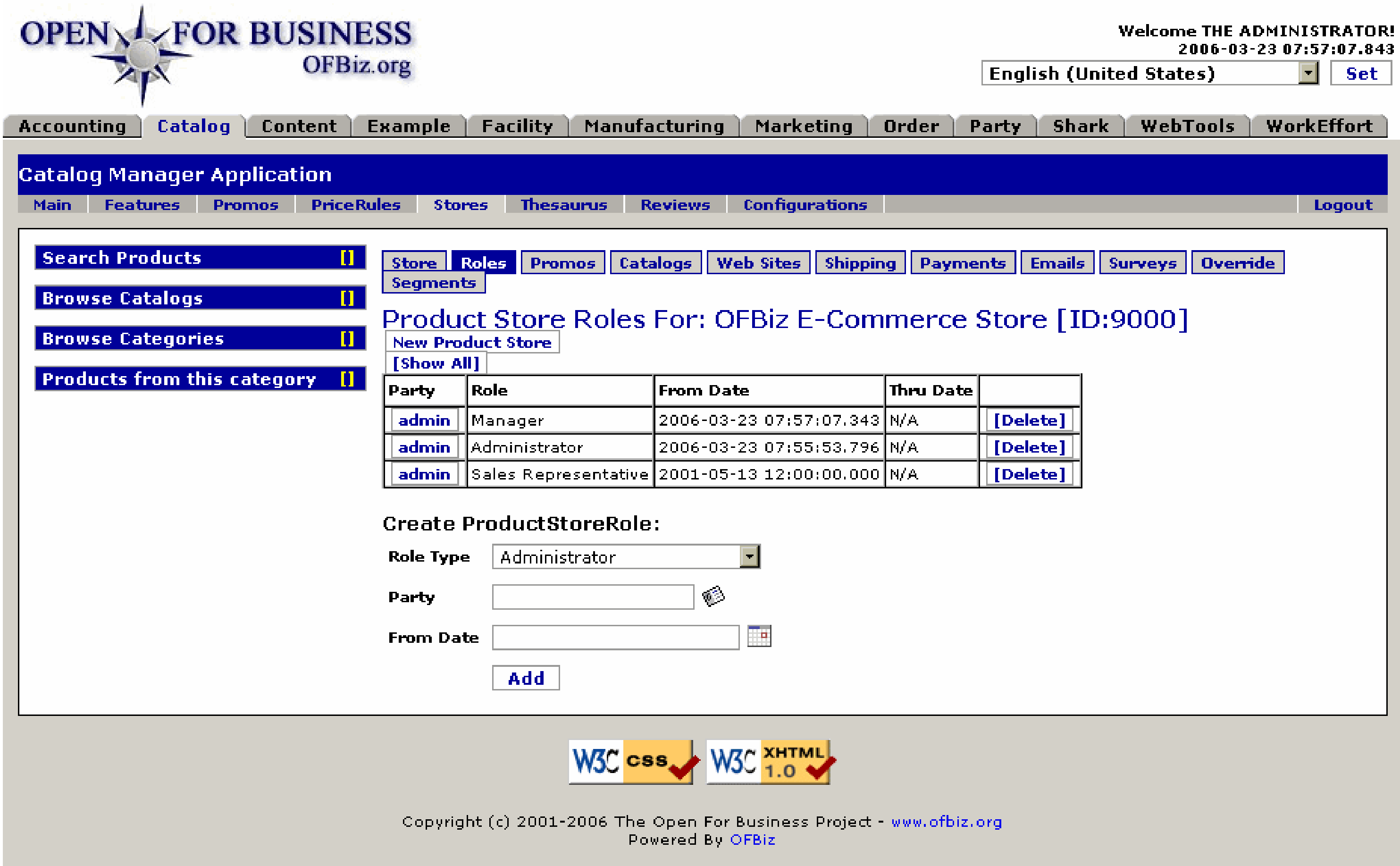
## .13.4.60 'Edit Facility WebStore Warehouse' link

Takes you to the Facilities Manager > Facilities Tab > Facility Sub-tab for this store. When making changes here in the Catalog Manager > Stores tab, it is quite likely you will also need to take care of some items in the Facilities Manager as well.

## .13.5 Roles

The Edit function is performed in the Party Manager under the Profile tab.

## .13.5.1 EditProductStoreRoles




Role of Parties associated with this Store are set here; PartyID in the Party column takes you to the Party Manager > Roles tab.

## .13.5.2 link buttons

[New Product Store] [Show All] [Delete] [Add] [Store] [Roles] [Promos] [Catalogs] [Web Sites] [Shipping] [Payments] [Emails] [Surveys] [Override] [Segments]

## .13.5.3 Table of Roles

The link [Show All] will display expired Roles as well as active ones. Thru Date only applies to deleted or expired Roles.

### .13.5.3.1 Party

Click on the ID to edit the Party in the Party Manager.

### .13.5.3.2 Role

Actually the Role Type as selected earlier from the list.

### .13.5.3.3 From Date

Date the assignment was created or made effective.

### .13.5.3.4 Thru Date

Only given when a Party has been deleted or expired from the list.

## .13.5.4 Create Product Store Role

### .13.5.4.1 Role Type (drop-down box)

Select the anticipated Role from the drop-down box.

### .13.5.4.2 Party

You may use the popup search tool to help find the Party.

#### .13.5.4.3 From Date (popup calendar)

Defaults to Now; enter a future date if not to be effective until later.

## .13.6 Promos

### .13.6.1 Discussion

Links to the Promo Name [ID] will take you to the Catalog - Promos tab where additional details are available for that promotion. Only promos associated with the selected store will be shown here. If a promo is deleted here, it is only deleted from this store association, not from the system. What you see here is basically the same as what you find under the major tab - Promos. The difference: these are the ones selected just for this Store. They are created and treated essentially the same here as under the other Tab, but remember that these will not apply to other stores unless you assign them to that specific Store.

### .13.6.2 EditProductStorePromos

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English (United States) Set

Accounting | Catalog | Content | Example | Facility | Manufacturing | Marketing | Order | Party | Shark | WebTools | WorkEffort

Catalog Manager Application

Main | Features | Promos | PriceRules | Stores | Thesaurus | Reviews | Configurations | Logout

Search Products []

Browse Catalogs []

Browse Categories []

Products from this category []

Store | Roles | Promos | Catalogs | Web Sites | Shipping | Payments | Emails | Surveys | Override | Segments

## Promotions For: OFBiz E-Commerce Store [ID:9000]

New Product Store

[Active and Inactive] [User and Auto Entered]

Showing Active Only and User Entered Only

1 - 11 of 11

| Promo Name [ID]] | From Date & Time | Thru Date/Time & Sequence | |
|---|---|---|---|
| Test $ off products in categories [9016] | 2001-05-13 12:00:00.0 | 1 Update | [Delete] |
| Test Gift with Amount of Specific Product [9017] | 2001-05-13 12:00:00.0 | 1 Update | [Delete] |
| Test Gift with Total Amount of Product [9018] | 2001-05-13 12:00:00.0 | 1 Update | [Delete] |
| Test Percent off when Customer Orders over $1000 in 12 months [9019] | 2001-05-13 12:00:00.0 | 1 Update | [Delete] |
| Test X products for $Y [9015] | 2001-05-13 12:00:00.0 | 2 Update | [Delete] |
| Test Promo 1 [9000] | 2001-05-13 12:00:00.0 | 5 Update | [Delete] |
| Test Percent off product set [9010] | 2001-05-13 12:00:00.0 | 5 Update | [Delete] |
| Test percent off entire purchase, no condition [9011] | 2001-05-13 12:00:00.0 | 5 Update | [Delete] |
| Test amount off order [9012] | 2001-05-13 12:00:00.0 | 5 Update | [Delete] |
| Test buy X get Y free [9013] | 2001-05-13 12:00:00.0 | 5 Update | [Delete] |
| Test buy X get Y at Z% discount [9014] | 2001-05-13 12:00:00.0 | 5 Update | [Delete] |

1 - 11 of 11

### Add Store Promo (select Promo, enter optional From Date):

Test $ off products in categories [9016] NOTE: Only user entered promos included in drop-down

Add

W3C CSS W3C XHTML 1.0



Only Promotions currently associated with this Store are shown here; use the tool beneath the table to associate new Promotions.

### .13.6.3 link buttons

[New Product Store] [Active and Inactive (toggle)] [User and Auto Entered (toggle)] [Update] [Delete] [Add][Store] [Roles] [Promos] [Catalogs] [Web Sites] [Shipping] [Payments] [Emails] [Surveys] [Override] [Segments]

### .13.6.4 Table of Promotions

#### .13.6.4.1 Discussion

Promos listed are for the active Product Store and meet the criteria set by the toggles above.

#### .13.6.4.2 Promo Name (ID)

Link to Promotion Edit screen Under Catalog Manager > Promos tab.

#### .13.6.4.3 From Date

Date created or made effective.

#### .13.6.4.4 Thru Date / Time (popup calendar)

Shows when the association of this Promotion with the Product Store ends or expires. Use the popup calendar to set or change an expiration date. Click [Update] to complete any changes.

#### .13.6.4.5 Sequence

If there is a sequencing system in place, this is the number assigned.

### .13.6.5 Tool to Add Store Promo

#### .13.6.5.1 Select promo (drop-down box)

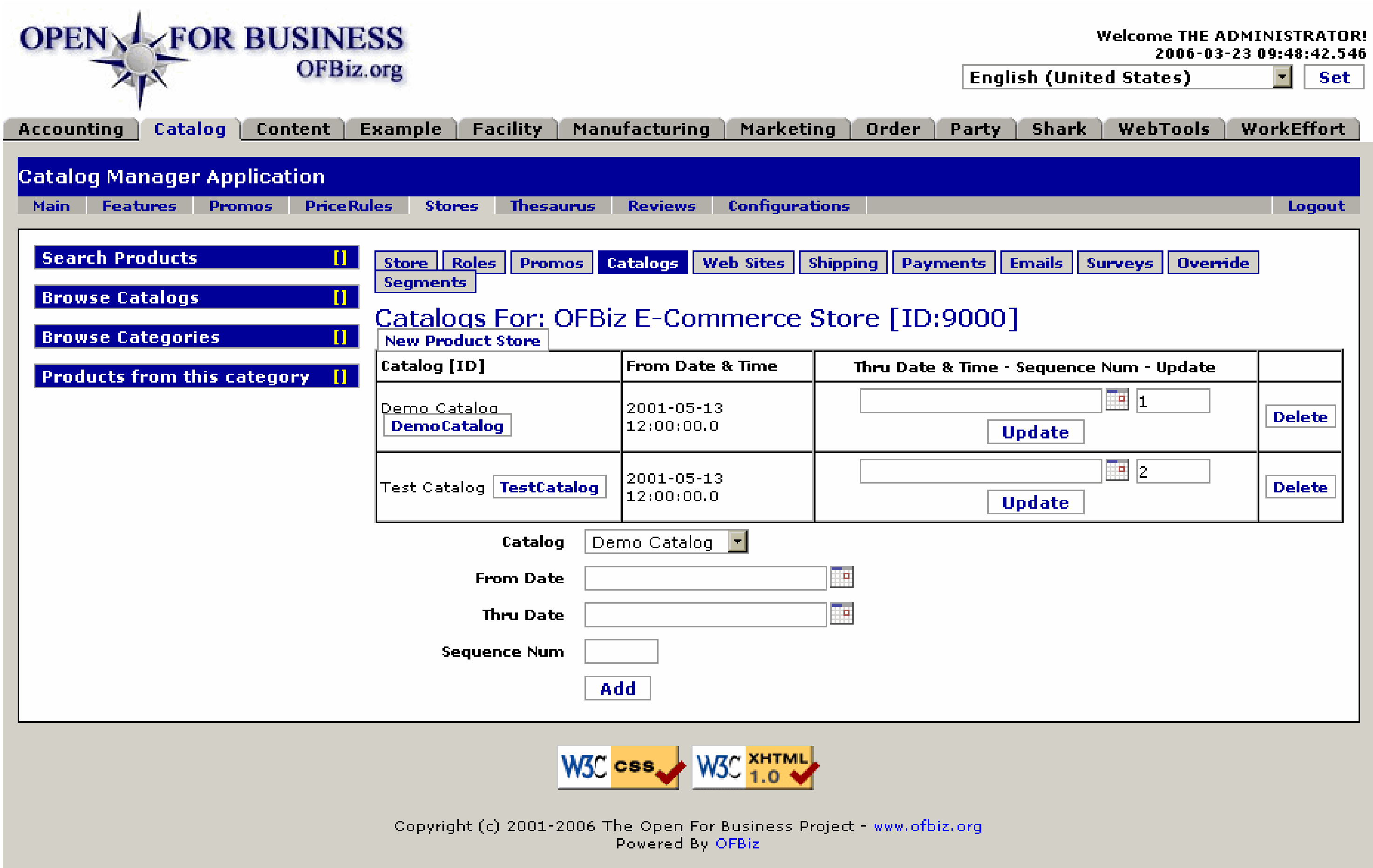
Only user entered Promos already in the system at the Catalog - Promos tab can be added to the Store.

### .13.6.5.2 From date and time

Defaults to Now; use the popup calendar to enter a future effectivity date.

## .13.7 Catalogs

### .13.7.1 EditProductStoreCatalogs




Any Catalog associated with the active Store can be selected for edit from here; additional Catalogs can be linked as well.

### .13.7.2 link buttons

[New Product Store] [Update] [Delete] [Add] [Store] [Roles] [Promos] [Catalogs] [Web Sites] [Shipping] [Payments] [Emails] [Surveys] [Override] [Segments]

## .13.7.3 Table of applicable catalogs

Click on [Edit] or the Catalog ID to go to the Edit Catalog screen. From there you can edit the Catalog, the Stores, the Parties or the Categories associated with it. See Catalog - EditProdCatalog for details on those screens.

### .13.7.3.1 Catalog

Name of the Catalog and its Catalog ID. Click on the ID to edit.

### .13.7.3.2 From Date and Time

Date the association was created or made effective.

### .13.7.3.3 Thru Date and Time (popup calendar)

Enter if you wish the Catalog to expire at a future date.

### .13.7.3.4 Sequence Num

If there is a sequencing system in place, this is the number.

## .13.7.4 Tool to add catalog

### .13.7.4.1 Catalog (drop-down box)

Select the Catalog to add from the drop-down list.

### .13.7.4.2 From Date (popup calendar)

Defaults to Now; enter if you wish a future date of effectivity.

### .13.7.4.3 Thru Date (popup calendar)

Enter only if you wish the association to expire at some future point.

#### .13.7.4.4 Sequence Num

If there is a sequencing system in place, enter the Sequence number for this Catalog here.

## .13.8 Web Sites

A click on Site Name takes you to the Content Manager - WebSites tab to update web site data.

### .13.8.1 EditProductStoreWebSites

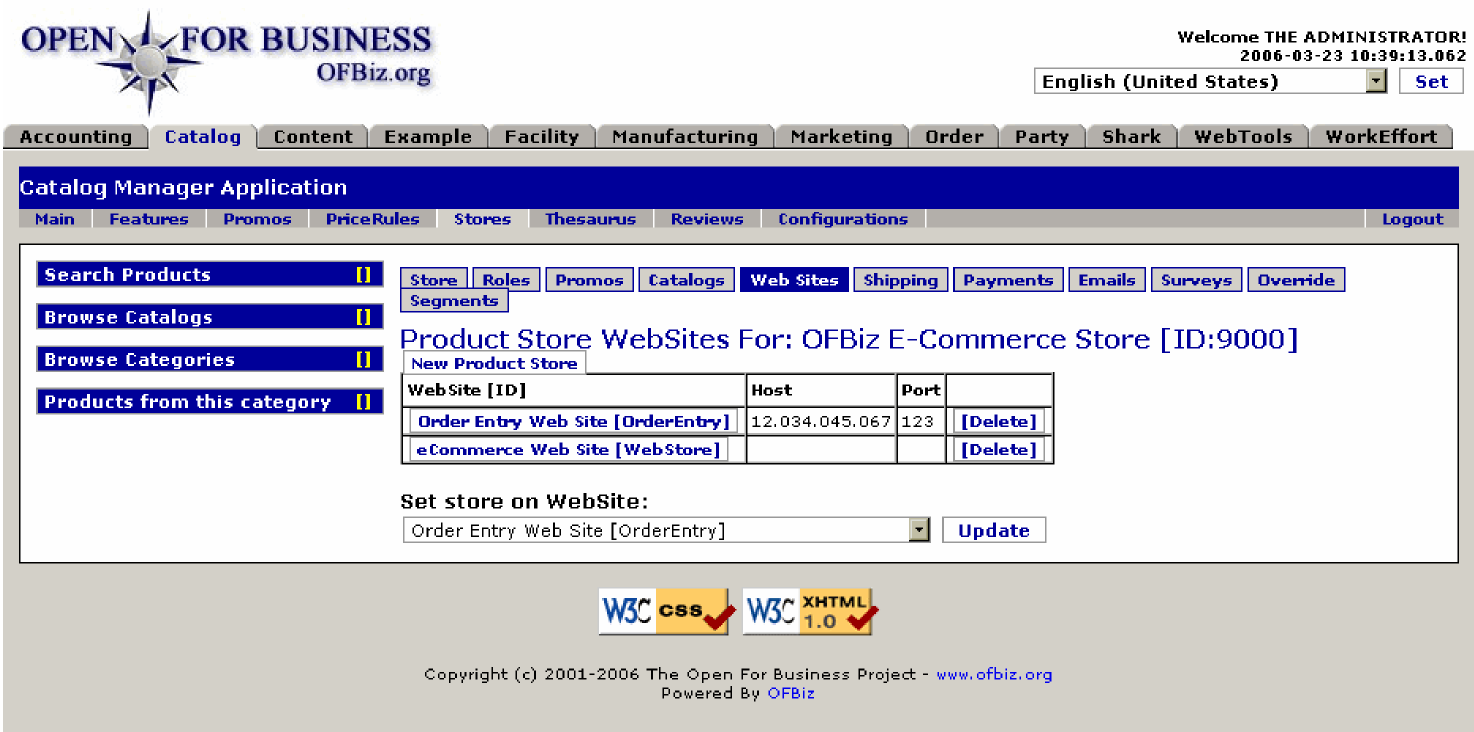
### .13.8.2 link buttons

[New Product Store] [Delete] [Update] [Store] [Roles] [Promos] [Catalogs] [Web Sites] [Shipping] [Payments][Emails] [Surveys] [Override] [Segments]

### .13.8.3 Table of Websites

#### .13.8.3.1 WebSite

A click on the Website ID takes you to the Content Manager - Edit Website screen.




Websites associated with this Store are listed here; new sites can be added, invalid ones deleted. Click the ID to edit.

### .13.8.3.2 Host

The address of the Host.

### .13.8.3.3 Port

The server Port connection for the Website.

## .13.8.4 Set store on WebSite

Select name from drop-down box, then click on [Update].

## .13.9 Shipping

### .13.9.1 EditProductStoreShipSetup


More than just a table of Shipment Settings, this is a portal to creating new Estimates and new Methods as well as viewing the details about existing Shipping Estimates.

### .13.9.2 link buttons

[New Product Store] [New Shipment Estimate] [New Shipment Method] [Delete] [View] [Store] [Roles] [Promos] [Catalogs] [Web Sites] [Shipping] [Payments] [Emails] [Surveys] [Override] [Segments]

### .13.9.3 Estimate ID

The ID number assigned by the system when the Estimate was created.

## .13.9.4 Method

What method is the order being shipped: UPS Ground? Postal? DHL?

## .13.9.5 To

Destination geographically. If All, that means all destinations; in other words, this is a blanket estimate. If the Estimate names a specific destination, it will be listed here.

NOTE: When created, the drop-down box lists all countries, all provinces, all states, and regions, so this To refers to major geographical destinations but not cities or communities.

## .13.9.6 Party

All means that this Estimate is valid for All parties using the system. If a Party is named, then this Estimate is

just for that Party.

## .13.9.7 Role

If All, then this Estimate is valid for All or any Party Role using it. If there is a Role listed, then the Estimate is only valid for those with that Role.

## .13.9.8 Base Prc

Flat Base Percent of the total order value. Determined by the formula:shipamount=shipamount + (orderTotal * percent)

## .13.9.9 Base Price

Flat Base Price. Determined by the formula:shipamount=shipamount + price

## .13.9.10 Item Price

Flat Item Price on the total order quantity. Determined by the formula: shipamount=shipamount + (totalQuantity * price)

## .13.9.11 Product Store Shipment Settings

### .13.9.11.1 Discussion

You may have many different Shipping Estimates associated with any one Shipping Method. This makes it possible to accommodate the variety of shipping situations you are likely to encounter.

### .13.9.11.2 EditProductStoreShipSetup-View

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2006-03-23 13:38:24.828
English (United States) Set

Accounting | Catalog | Content | Example | Facility | Manufacturing | Marketing | Order | Party | Shark | WebTools | WorkEffort

Catalog Manager Application

Main | Features | Promos | PriceRules | Stores | Thesaurus | Reviews | Configurations | Logout

Search Products []

Browse Catalogs []

Browse Categories []

Products from this category []

Store | Roles | Promos | Catalogs | Web Sites | Shipping | Payments | Emails | Surveys | Override | Segments

## Product Store Shipment Settings For: OFBiz E-Commerce Store [ID:9000]

New Product Store

[New Shipment Estimate] [New Shipment Method]

| Estimate ID | Method | To | Party | Role | Base% | Base Prc | Item Prc | | |
|---|---|---|---|---|---|---|---|---|---|
| 9000 | AIR (UPS) | All | All | All | 0% | 5 | 0 | [Delete] | [View] |
| 9100 | EXPRESS (DHL) | All | All | All | 0% | 10 | 0 | [Delete] | [View] |
| 9103 | GROUND (DHL) | All | All | All | 0% | 3 | 0 | [Delete] | [View] |
| 9001 | GROUND (UPS) | All | All | All | 0% | 3 | 0 | [Delete] | [View] |
| 9002 | LOCAL_DELIVERY (Company) | All | All | All | 0% | 5 | 0 | [Delete] | [View] |
| 9003 | NEXT_DAY (UPS) | All | All | All | 0% | 10 | 0 | [Delete] | [View] |
| 9101 | NEXT_PM (DHL) | All | All | All | 0% | 9 | 0 | [Delete] | [View] |
| 9005 | NO_SHIPPING (_NA_) | All | All | All | 0% | 0 | 0 | [Delete] | [View] |
| 9102 | SECOND_DAY (DHL) | All | All | All | 0% | 5 | 0 | [Delete] | [View] |
| 9004 | STANDARD (_NA_) | All | All | All | 20% | 0 | 0 | [Delete] | [View] |

| | |
|---|---|
| **Shipment Method** | GROUND (UPS) |
| **From Geo** | All |
| **To Geo** | All |
| **Party** | All |
| **Role** | All |
| **Flat Base Percent** | 0% - shipamount=shipamount + (orderTotal * percent) |
| **Flat Base Price** | 3 - shipamount=shipamount + price |
| **Flat Item Price** | 0 - shipamount=shipamount + (totalQuantity * price) |
| **Feature Group** | N/A - Below surcharge(s) will be added per-product * per-feature |
| **Per-Feature Percent** | 0% - shipamount : shipamount + ((orderTotal * percent) * total feature(s) applied) |
| **Per-Feature Price** | 0 - shipamount : shipamount + (price * total feature(s) applied) |
| **Oversize Unit** | N/A - Each product ((height * 2) + (width * 2) + depth) >= this amount |
| **Oversize Surcharge** | 0 - shipamount : shipamount + (# oversize products * surcharge) |
| **Weight** | 0 min -> up to max; 0 max -> from min and up |
| **Min - Max (span)** | 0-0 |
| **Unit Of Measure** | |
| **Per Unit Price** | 0.1 -only applies if within span |
| **Quantity** | 0 min -> up to max; 0 max -> from min and up |
| **Min - Max (span)** | - |
| **Unit Of Measure** | |
| **Per Unit Price** | 0 - only applies if within span |
| **Price** | 0 min -> up to max; 0 max -> from min and up |
| **Min - Max (span)** | - |
| **Per Unit Price** | 0 - only applies if within span |

W3C CSS W3C XHTML 1.0



When [View] is selected for anyof the displayed settings, an enlarged presentation like this is presented.

### .13.9.11.3 link buttons

[New Product Store] [New Shipment Estimate] [New Shipment Method] [Delete] [View] [Store] [Roles][Promos] [Catalogs] [Web Sites] [Shipping] [Payments] [Emails] [Surveys] [Override] [Segments]

### .13.9.11.4 Details of the Settings

These details given beneath the table will vary according to the shipping method. Shown here are typical details from one method.

### .13.9.12 New Product Store Shipment Method Settings

#### .13.9.12.1 EditProductStoreShipSetup-Method

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Accounting | Catalog | Content | Example | Facility | Manufacturing | Marketing | Order | Party | Shark | WebTools | WorkEffort

## Catalog Manager Application

Main | Features | Promos | PriceRules | Stores | Thesaurus | Reviews | Configurations | Logout

- Search Products []
- Browse Catalogs []
- Browse Categories []
- Products from this category []

Store | Roles | Promos | Catalogs | Web Sites | Shipping | Payments | Emails | Surveys | Override | Segments

# Product Store Shipment Settings For: OFBiz E-Commerce Store [ID:9000]

New Product Store
[New Shipment Estimate] [View Estimates]

### Store Shipment Method Associations

| Method Typee | Party | Min Sz | Max Sz | Min Wt | Max Wt | Min $ | Max $ | Allow USPS | Req USPS | Allow Co | Req Co | Inc FreeShip | Inc Geo | Exc Geo | Inc Feature | Exc Feature | Seq | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Guaranteed Next Day | UPS | | | | | 0.00 | 0.00 | N | N | N | N | N | | | | | 1 | [Update] | [Remove] |
| Air | UPS | | | | | 0.00 | 0.00 | N | N | N | N | N | | | | | 2 | [Update] | [Remove] |
| Ground | UPS | | | | | 0.00 | 0.00 | N | N | N | N | N | | | | | 3 | [Update] | [Remove] |
| Express | USPS | | | | | 0.00 | 0.00 | Y | N | N | N | N | | | | | 4 | [Update] | [Remove] |
| Standard | USPS | | | | | 0.00 | 0.00 | Y | N | N | N | N | | | | | 5 | [Update] | [Remove] |
| No Shipping | _NA_ | | | | | 0.00 | 0.00 | N | N | N | N | Y | | | | | 6 | [Update] | [Remove] |
| Express | DHL | | | | | 0.00 | 0.00 | N | N | N | N | N | | | | | 7 | [Update] | [Remove] |
| Next Afternoon | DHL | | | | | 0.00 | 0.00 | N | N | N | N | N | | | | | 8 | [Update] | [Remove] |
| Second Day | DHL | | | | | 0.00 | 0.00 | N | N | N | N | N | | | | | 9 | [Update] | [Remove] |
| Ground | DHL | | | | | 0.00 | 0.00 | N | N | N | N | N | | | | | 10 | [Update] | [Remove] |

**Carrier Shipment Method** Select One *
**Min Size** Displays only if smallest product size is equal/greater then this value
**Max Size** Displays only if largest product size is equal/less then this value
**Min Weight** Displays only if total weight is equal/greater then this value
**Max Weight** Displays only if total weight is equal/less then this value
**Min Total** Displays only if total price is equal/greater then this value
**Max Total** Displays only if total price is equal/less then this value
**Allow USPS Addr (PO Box, RR, etc)** N
**Require USPS Addr (PO Box, RR, etc)** N Setting ignored if Allow is 'N'
**Allow Company Addr** N
**Require Company Addr** N Setting ignored if Allow is 'N'
**Company Party ID** Used with allow company address
**Include Free Ship Items** Y Set to N to hide when the cart contains ONLY free shipping items
**Include GeoId** Displays only if ship-to is in this geo
**Exclude GeoId** Displays only if ship-to is not in this geo
**Include Feature Group** Displays only if all items have all features in this group
**Exclude Feature Group** Displays only if all items have no features in this group
**Service Name**
**Service Config**
**Sequence#** Used For Display Ordering

Add

### Shipment Method Type :

**Select To Edit** Air | Edit
**Shipment Method Type** *
**Description** *

Create

### Carrier Shipment Method :

**Select To Edit** Guaranteed Next Day (UPS/CARRIER) | Edit
**Shipment Method** Air *
**Role Type** Carrier *
**Party** *
**Carrier Service Code**
**Sequence #** Used For Display Ordering

Create

W3C css | W3C XHTML 1.0



Add, create, delete or edit details of the Store Shipment Method Associations from this working screen. Caution: settings impact Order Entries.

## .13.9.12.2 link buttons

[New Product Store] [New Shipment Estimate] [View Estimates] [Update] [Remove] [Add] [Edit] [Create][Store] [Roles] [Promos] [Catalogs] [Web Sites] [Shipping] [Payments] [Emails] [Surveys] [Override] [Segments]

## .13.9.12.3 Table of Store Shipment Method Associations

### .13.9.12.3.1 Method Type

Originally entered from the Carrier Shipment Method drop-down box beneath the table and created at the 'Shipment Method Type' section of the tools below.

### .13.9.12.3.2 Party

This is the Party that performs the shipping: UPS, DHL, etc.

### .13.9.12.3.3 Min Sz

Minimum Size - Displays only if smallest product size is equal/greater than this value.Be careful with this. If your Minimum Size is too large, anything smaller will not be shipped by this method. You do not need to state a Minimum Size unless the Carrier has specified such.

### .13.9.12.3.4 Max Sz

Maximum size - Displays only if largest product size is equal/less than this value.As with the Minimum Size, if your parameter is set too small, anything larger will not be accommodated. You really do not need to state a Maximum Size unless the Carrier has specified such.

### .13.9.12.3.5 Min Wt

Minimum weight - Displays only if total weight is equal/greater than this value.You really do not need to state a Minimum weight unless the Carrier has specified such. Consider this: if the catalog does not carry any weight measurement for the item, that '0' would register as below whatever Minimum you might set over '0'. In this case, you could not ship the item with this method; it would not appear as a choice.

### .13.9.12.3.6 Max Wt

Maximum weight - Displays only if total weight is equal/less than this value.Not recommended unless the Carrier has specified a Maximum. Anything over this weight will cause the Shipment Method to not be shown.

### .13.9.12.3.7 Min $

Minimum Total Price - Displays only if total price is equal/greater than this value.Unless there is a cost - value determination that this is not an economical method to ship items for less than this amount, you need not specify a Minimum Total Price. Any amount you specify will be a cut-off: if $10 is stated (for example), then an order for $9.99 or less will not have this Shipping Method dsplayed.

### .13.9.12.3.8 Max $

Maximum Total Price - Displays only if total price is equal/less than this value.You really do not need to state a Maximum Total Price unless the Carrier has specified such for insurance reasons, for example. Any orders exceeding this Total Price will not have this shipping method displayed to them.

### .13.9.12.3.9 Allow USPS (Y/N)

Allow USPS Addr (PO Box, RR, etc) - refers to the difference between a mailing address and a shipping address. Some items cannot be received at a US Postal Service address, especially when this involves a consolidated or centralized mail box station at an apartment complex, for example, or at a Postal Facility (PO Box). Smaller items generally are acceptable. This choice is to flag whether receipt at the limited Postal facility is acceptable. For Shipment Methods using DHL and other private carriers, this should be set to N because they cannot deliver to PO boxes. For Shipment Methods using USPS, this must be set to Y.

### .13.9.12.3.10 Req USPS

Require a USPS Address (PO Box, RR, etc.) - Sometimes the shipment MUST be made to a USPS address to ensure, for example, that no one other than the addressee receives the item. If too large for a postal box, the

item could be held at the Postal facility for claim by the addressee.

Generally set this to N unless the carrier is USPS because the US Postal Service can always ship to these addresses.

### .13.9.12.3.11 Allow Co

Allow Company Address - If an item is sent to a private party but received at a Company address, there is greater likelihood that the addressee might never receive it, or claim to never have received it. On the other hand, the reasoning above is just speculative; you need to be able to ship wherever the customer wants delivery, so this should probably be set to Y. This flag, if set to N, indicates denial of delivery to a company address.

### .13.9.12.3.12 Req Co

Require Company Address? When the order has been made on behalf of a company, or the shipment is the result of a company purchase order or company account, shipment should be made to a Company address rather than an individual's address. This will help to ensure receipt and subsequent payment for the product.

On the other hand, if the flag is set to Yes, then this method cannot be used unless the order is being shipped to a Company address. Therefore, to Require a Company Address should probably be set to N unless you have a compelling reason to require it.

### .13.9.12.3.13 Inc Free Ship

Include Free Ship Items - Set to N to hide when the cart contains ONLY free shipping items.

### .13.9.12.3.14 Inc Geo

Include Geo Id (the geographical area code) - Displays only if the ship-to is in this geographical area.

### .13.9.12.3.15 Exc Geo

Exclude Geo Id - Displays only if ship-to is not in this geographical area.

### .13.9.12.3.16 Inc Feature

Include Feature Group - Displays only if all items have all of the features in this group.

### .13.9.12.3.17 Exc Feature

Exclude Feature Group - Displays only if all items have NONE of the features in this group.

### .13.9.12.3.18 Sequence

Sequence number assigned.

## .13.9.12.4 Carrier Shipment Method criteria

### .13.9.12.4.1 Carrier Shipment Method (drop-down box)

Select from the drop-down box.

### .13.9.12.4.2 Min Size

Minimum Size - Displays only if smallest product size is equal/greater than this value.Be careful with this. If your Minimum Size is too large, anything smaller will not be shipped by this method. You really do not need to state a Minimum Size unless the Carrier has specified such.

### .13.9.12.4.3 Max Size

Maximum size - Displays only if largest product size is equal/less than this value. As with the Minimum Size, if your parameter is set too small, anything larger will not be accommodated. You really do not need to state a Maximum Size unless the Carrier has specified such.

### .13.9.12.4.4 Min Weight

Minimum weight - Displays only if total weight is equal/greater than this value.You really do not need to state a Minimum weight unless the Carrier has specified such. Consider this: if the catalog does not carry any weight measurement for the item, that '0' would register as below whatever Minimum you might set over '0'. In this case, you could not ship the item with this method; it would not appear as a choice.

### .13.9.12.4.5 Max Weight

Maximum weight - Displays only if total weight is equal/less than this value.Not recommended unless the Carrier has specified a Maximum. Anything over this weight will cause the Shipment Method to not be shown.

### .13.9.12.4.6 Min Total ($)

Minimum Total Price - Displays only if total price is equal/greater than this value.Unless there is a cost - value determination that this is not an economical method to ship items for less than this amount, you need not specify a Minimum Total Price. Any amount you specify will be a cut-off: if $10 is stated (for example), then an order for $9.99 or less will not have this Shipping Method dsplayed.

### .13.9.12.4.7 Max Total ($)

Maximum Total Price - Displays only if total price is equal/less than this value.You really do not need to state a Maximum Total Price unless the Carrier has specified such for insurance reasons, for example. Any orders exceeding this Total Price will not have this shipping method displayed to them.

### .13.9.12.4.8 Allow USPS Addr (Y/N)

Allow USPS Addr (PO Box, RR, etc) - refers to the difference between a mailing address and a shipping address. Some items cannot be received at a US Postal Service address, especially when this involves a consolidated or centralized mail box station at an apartment complex, for example, or at a Postal Facility (PO Box). Smaller items generally are acceptable. This choice is to flag whether receipt at the limited Postal facility is acceptable. For Shipment Methods using DHL and other private carriers, this should be set to N because they cannot deliver to PO boxes. For Shipment Methods using USPS, this must be set to Y.

### .13.9.12.4.9 Require USPS Addr (Y/N)

Setting ignored if Allow USPS Addr is 'N'. Sometimes the shipment MUST be made to a USPS address to, for example, ensure that no one other than the addressee receives the item. If too large for a postal box, the item could be held at the Postal facility for claim by the addressee. Generally set this to N unless the carrier is USPS because the US Postal Service can always ship to these addresses.

### .13.9.12.4.10 Allow Company Addr (Y/N)

Allow Company Address - If an item is sent to a private party but received at a Company address, there is greater likelihood that the addressee might never receive it, or claim to never have received it.

On the other hand, the reasoning above is just speculative; you need to be able to ship wherever the customer wants delivery, so this should probably be set to Y. This flag, if set to N, indicates denial of delivery to a company address.

### .13.9.12.4.11 Require Company Addr (Y/N)

Setting ignored if Allow is 'N'. When the order has been made on behalf of a company, or the shipment is the result of a company purchase order or company account, shipment should be made to a Company address rather than an individual's address. This will help to ensure receipt and subsequent payment for the product.

On the other hand, if the flag is set to Yes, then this method cannot be used unless the order is being shipped to a Company address. Therefore, to Require a Company Address should probably be set to N unless you have a compelling reason to require it.

### .13.9.12.4.12 Company Party ID

Used with 'Allow company address.'

### .13.9.12.4.13 Include Free Ship Items (Y/N)

Set to N to hide when the cart contains ONLY free shipping items.

### .13.9.12.4.14 Include GeoID (drop-down box)

Displays only if ship-to is in this geo.

### .13.9.12.4.15 Exclude GeoID (drop-down box)

Displays only if ship-to is not in this geographical area.

### .13.9.12.4.16 Include Feature Group

Displays only if all items have all features in this group.

### .13.9.12.4.17 Exclude Feature Group

Displays only if all items have NO features in this group.

### .13.9.12.4.18 Service Name

Name of the shipping service. This is NOT the Carrier. Unless you are using an on-line rate inquiry service or some similar shipping information support company, this field should remain blank.

### .13.9.12.4.19 Service Config

Configuration established for this Shipment Method as associated with the forgoing Service Company. You can probably leave this blank.

#### .13.9.12.4.20 Sequence #

Used For Display Ordering.

### .13.9.12.5 Shipment Method Type

Edit takes you to the New Shipment Work Screen, above.

#### .13.9.12.5.1 Select To Edit (drop-down box)

Select from one of the following types of Shipment Methods:

- Air
- Express
- Ground
- Guaranteed Next Day
- Local Delivery
- Next Afternoon
- No Shipping
- Second Day
- Standard

#### .13.9.12.5.2 Shipment Method Type *

Required Field. This is the Carrier's name for the Method Type.

#### .13.9.12.5.3 Description *

Required field. Enter a short descriptive phrase, then click on [Create].

### .13.9.12.6 Carrier Shipment Method

Edit takes you to the New Shipment Work Screen, above.

#### .13.9.12.6.1 Select to Edit (drop-down box)

Choose from the drop-down box. Entries are combinations of a Shipment Method and a Carrier.

#### .13.9.12.6.2 Shipment Method * (drop-down box)

Required field. Select from one of the following types of Shipment Methods:

- Air

- Express
- Ground
- Guaranteed Next Day
- Local Delivery
- Next Afternoon
- No Shipping
- Second Day
- Standard

### .13.9.12.6.3 Role Type * (drop-down box)

Required field. Although all established Roles are presented in the list, 'Carrier' is most likely the one desired here.

### .13.9.12.6.4 Party *

Party ID for the Carrier itself.

### .13.9.12.6.5 Carrier Service Code

This is the Code or name the Carrier Service assigns to this type of shipment service.

### .13.9.12.6.6 Sequence #

Used for display ordering.

## .13.9.13 New Product Store Shipment Estimates

Any one Shipping method may have many different Estimates. To support multiple sets of constraints, you can create multiple Estimate records for a specific Shipping Method.

### .13.9.13.1 EditProductStoreShipSetup-Estimate

OPEN FOR BUSINESS OFBiz.org

Welcome THE ADMINISTRATOR!
2005-10-05 15:37:34.053
English (United States) Set

Accounting | Catalog | Content | Example | Facility | Manufacturing | Marketing | Order | Party | Shark | WebTools | WorkEffort

Catalog Manager Application

Main | Features | Promos | Price Rules | Stores | Thesaurus | Reviews | Configurations | Logout

Search Products []
Browse Catalogs []
Browse Categories []
Products from this category []

Store | Roles | Promos | Catalogs | Web Sites | Sales Tax | Shipping | Payments | Emails | Surveys
Override | Segments

## Product Store Shipment Settings For: OFBiz E-Commerce Store [ID:9000]

[New Product Store]
[New Shipment Method] [View Estimates]

New Shipment Estimate :

Shipment Method: Express (DHL)
From Geo: US Continental
To Geo: Federated States of Micronesia
Party: SHIPPER
Role:

Flat Base Percent: 0 shipamount=shipamount + (orderTotal * percent)
Flat Base Price: 0.00 shipamount=shipamount + price
Flat Item Price: 0.00 shipamount=shipamount + (totalQuantity * price)

Feature Group: Below surcharge(s) will be added per-product * per-feature
Per-Feature Percent: 0 shipamount : shipamount + ((orderTotal * percent) * total feature(s) applied)
Per-Feature Price: 0.00 shipamount : shipamount + (price * total feature(s) applied)

Oversize Unit: 30 Each product ((height * 2) + (width * 2) + depth) >= this amount
Oversize Surcharge: 1.00 shipamount : shipamount + (# oversize products * surcharge)

Weight: 0 min -> up to max; 0 max -> from min and up
Min - Max (span): 1 - 10
Unit Of Measure: Pound (avdp)
Per Unit Price: 5 only applies if within span

Quantity: 0 min -> up to max; 0 max -> from min and up
Min - Max (span): -
Unit Of Measure: Acre
Per Unit Price: only applies if within span

Price: 0 min -> up to max; 0 max -> from min and up
Min - Max (span): -
Per Unit Price: only applies if within span

Add



Create a new Estimate for shipping a product from this store at this screen. Only complete applicable sections.

## .13.9.13.2 link buttons

[New Product Store] [View Estimates] [New Shipment Method] [Add] [Store] [Roles] [Promos] [Catalogs] [Web Sites] [Shipping] [Payments] [Emails] [Surveys] [Override] [Segments]

## .13.9.13.3 Shipment Method (drop-down box)

All the previously-established Shipment Methods are listed on this drop-down box. They were created from the screen 'New Shipment Method.' Select the method upon which this Estimate is based.

## .13.9.13.4 From Geo (drop-down box)

Shipping from this Geographical region. If any Geo is specified, this Estimate will not apply to any shipping from outside of that region.

## .13.9.13.5 To Geo (drop-down box)

Shipping TO this geographical region. If any Geo is specified, this Estimate will not apply to any shipping to a Geo outside of the given region.

## .13.9.13.6 Party

All means that this Estimate is valid for <I>All</I> parties using the system. If a specific Party is named, then this Estimate is just for that Party.

## .13.9.13.7 Role

If All, then this Estimate is valid for <I>All Roles</I> or for any Party Role using it. If there is a Role listed, then the Estimate is only valid for those Parties with that Role.

## .13.9.13.8 Flat Base Percent

One of the essential fields to set if a Flat Base Percent is the basis for how much you are going to charge. Enter a percent value that reflects what the charge will be IF based upon a percent value of the Total sales order. The formula that will then calculate your shipping charges on this basis would be:shipamount = shipamount + (orderTotal * percent)

## .13.9.13.9 Flat Base Price

One of the essential fields to set if 'Flat Base Price' is the basis for how much you are going to charge. Enter a price that reflects what the charge in this estimate will be IF based solely upon this Flat Base. The formula that will then calculate your shipping charges on this basis would be:shipamount = shipamount + price

## .13.9.13.10 Flat Item Price

One of the essential fields to set if Flat Item Price is the basis for how much you are going to charge. Enter a value that reflects what the charge will be per unit item.The formula that will then calculate your shipping charges on this basis would be:shipamount = shipamount + (totalQuantity * price)

## .13.9.13.11 Feature Group

Below surcharge(s) will be added per-product * per-feature.

### .13.9.13.11.1 Per-Feature Percent

shipamount : shipamount + ((orderTotal * percent) * total feature(s) applied)

### .13.9.13.11.2 Per-Feature Price

shipamount : shipamount + (price * total feature(s) applied)

## .13.9.13.12 Oversize Unit

Check with your Carrier to establish this value. The number relates to the largest physical size that can be accepted with this Estimate. Each product has these three factors: Height, Width and Depth. Take the height (from the top to the bottom at the highest point) and multiply it times two. Take the width (from the left to the right at the widest point) and multiply it times two. Take the depth (from the front to the rear at the deepest point) but do NOT double that. Add these three factors together to determine the packages Oversize Value, using the formula : ((height * 2) + (width * 2) + depth). Whatever value derives must not exceed the Oversize Unit amount as entered in this field.

## .13.9.13.13 Oversize Surcharge

shipamount : shipamount + (# oversize products * surcharge)

## .13.9.13.14 Weight

### .13.9.13.14.1 Min-Max (span)

The span is optional. Having this set incorrectly can cause more problems than not having one set at all. Follow the Carrier's lead on this one, if needed.0 min -> up to max; 0 max -> from min and up

### .13.9.13.14.2 Unit of Measure (drop-down box)

Unless unit is Each, select a UOM from the drop-down box.

### .13.9.13.14.3 Per Unit Price

If the shipping cost is based upon weight, the price per unit of weight must be stated here, with the unit of measure properly set, above.

## .13.9.13.15 Quantity

### .13.9.13.15.1 Min-Max (span)

The span is optional. Having this set incorrectly can cause more problems than not having one set at all. Follow the Carrier's lead on this one, if needed.0 min -> up to max; 0 max -> from min and up

### .13.9.13.15.2 Unit of Measure (drop-down box)

Unless unit is Each, select a UOM from the drop-down box.

### .13.9.13.15.3 Per Unit Price

If the shipping cost is a Flat Unit Price, state the price per unit here, based upon the Unit of Measure set above.

## .13.9.13.16 Price

### .13.9.13.16.1 Min-Max (span)

The span is optional. Having this set incorrectly can cause more problems than not having one set at all. Follow the Carrier's lead on this one, if needed.0 min -> up to max; 0 max -> from min and up

### .13.9.13.16.2 Per Unit Price

Set a Per Unit Price. This setting is essential if the Estimate is based upon a Flat Unit Price.

## .13.10 Payments

### .13.10.1 EditProductStore PaySetup


All Payment Settings are shown here. You may delete, edit or create new Settings. This integrates with Accounting and Order managers.

### .13.10.2 link buttons

[New Product Store] [Delete] [Edit] [Create] [Store] [Roles] [Promos] [Catalogs] [Web Sites] [Shipping][Payments] [Emails]

[Surveys] [Override] [Segments]

## .13.10.3 Table with existing payment settings

### .13.10.3.1 Payment Method Type

Credit Card, EFT, etc.

### .13.10.3.2 Service Type

What type of service is available.

### .13.10.3.3 Service Name

The programmed name to activate this Service.

### .13.10.3.4 Payment Props

Payment Properties are generally set to Global by default unless otherwise specified.

### .13.10.3.5 All Prods?

Does this Service work for all Products? Yes or No.

## .13.10.4 Tool to edit or start methods

When [Edit] is selected from the table above, the appropriate fields are populated to match the selected item. Click [Update] to take the changes to the table.

### .13.10.4.1 Payment Method Type (drop-down box)

Typical Payment Methods might include:

- ---
- Billing Account
- Certified Check
- Cash on Delivery
- Company Account

- Company Check
- Credit Card
- Electronic Funds Transfer (EFT)
- Gift Card
- Gift Certificate
- Money Order
- Offline Payment
- PayPal
- Personal Check
- WorldPay

### .13.10.4.2 Service Type (drop-down box)

Typical Service Types might include:

- External Payment (no service)
- Payment Auth Verification Service
- Payment Authorization Service
- Payment Capture Service
- Payment Credit Service
- Payment Re-Authorization Service
- Payment Refund Service
- Payment Release Authorization Service

### .13.10.4.3 Service Name

The programmed name to activate this Service.

### .13.10.4.4 Payment Properties

Defaults to Global.

### .13.10.4.5 Apply to All Products? (Y/N)

Does this Service apply to all products? If not, select N.

## .13.11 Emails

.13.11.1 EditProductStoreEmails

# Product Store Email Settings For: OFBiz E-Commerce Store [ID:9000]

New Product Store

| Email Type | Body Screen Location - Attachment Screen Location (XSL-FO) - From Address - Cc Address - Bcc Address - Subject - Content Type - Update | Delete |
|---|---|---|
| Gift-Card Purchase | component://ecommerce/widget/EmailGiftCardScreens.xml#Gift<br><br>ofbiztest@yahoo.com<br><br><br>A Gift From ${senderName}!<br><br>Update | Delete |
| Gift-Card Reload | component://ecommerce/widget/EmailGiftCardScreens.xml#Gift<br><br>ofbiztest@yahoo.com<br><br><br>Gift Card Reload Results<br><br>Update | Delete |
| Back-Order | component://ecommerce/widget/EmailOrderScreens.xml#Backo<br><br>ofbiztest@yahoo.com<br><br><br>OFBiz Demo - Backorder Notification #${orderId}<br><br>Update | Delete |
| Order Change | component://ecommerce/widget/EmailOrderScreens.xml#Order(<br><br>ofbiztest@yahoo.com<br><br><br>OFBiz Demo - Order Change Notification #${orderId}<br><br>Update | Delete |
| Complete | component://ecommerce/widget/EmailOrderScreens.xml#Order(<br><br>ofbiztest@yahoo.com<br><br><br>OFBiz Demo - Your Order Is Complete #${orderId}<br><br>Update | Delete |
| Confirmation | component://ecommerce/widget/EmailOrderScreens.xml#Order(<br>component://ecommerce/widget/EmailOrderScreens.xml#Order(<br>ofbiztest@yahoo.com<br><br>ofbiztest@yahoo.com<br>OFBiz Demo - Order Confirmation #${orderId}<br><br>Update | Delete |
| Payment Retry | component://ecommerce/widget/EmailOrderScreens.xml#Payme<br><br>ofbiztest@yahoo.com<br><br><br>OFBiz Demo - Order Payment Notification #${orderId}<br><br>Update | Delete |
| Retrieve Password | component://securityext/widget/EmailSecurityScreens.xml#Pass<br><br>ofbiztest@yahoo.com<br><br><br>OFBiz Demo - Password Reminder (${userLoginId})<br><br>Update | Delete |
| Quote Confirmation | component://order/widget/ordermgr/QuoteScreens.xml#ViewQu<br>component://order/widget/ordermgr/QuoteScreens.xml#QuoteR<br>ofbiztest@yahoo.com<br><br>ofbiztest@yahoo.com<br>OFBiz Demo - Quote Confirmation #${quoteId}<br><br>Update | Delete |
| Return Accepted | component://ecommerce/widget/EmailReturnScreens.xml#Retur<br><br>ofbiztest@yahoo.com<br><br><br>OFBiz Demo - Return Accepted #${returnHeader.returnId}<br><br>Update | Delete |
| Return Cancelled | component://ecommerce/widget/EmailReturnScreens.xml#Retur<br><br>ofbiztest@yahoo.com<br><br><br>OFBiz Demo - Return Cancelled #${returnHeader.returnId}<br><br>Update | Delete |
| Return Completed | component://ecommerce/widget/EmailReturnScreens.xml#Retur<br><br>ofbiztest@yahoo.com<br><br><br>OFBiz Demo - Return Completed #${returnHeader.returnId}<br><br>Update | Delete |
| | component://ecommerce/widget/EmailProductScreens.xml#TellF | |

## .13.11.2 link buttons

[New Product Store] [Update] [Delete] [Add] [Store] [Roles] [Promos] [Catalogs] [Web Sites] [Shipping][Payments] [Emails] [Surveys] [Override] [Segments]

## .13.11.3 Table of existing email settings

### .13.11.3.1 Email Type

Used to identify the purpose of the email.

### .13.11.3.2 Body Screen Location

The top text box within the frame indicates where the template text and commands exist on your server. You may edit this content here, then click on [Update].

### .13.11.3.3 Attachment Screen Location (XSL-FO)

This is in the second text box from the top of the section. It gives the address on your server where the email program will find locations for attachments to these automated messages. You may edit this content here, then click on [Update].

### .13.11.3.4 From Address

In the third text box from the top in this section is your originating email address, the one which the addressee may respond to. You may edit this content here, then click on [Update].

### .13.11.3.5 CC Address

In the 4th text box from the top of each frame is the address of anyone else besides the recipient who should be getting a copy of this email. For example, on shipping you might CC the shipping department and the carrier. You may edit this content here, then click on [Update].

### .13.11.3.6 BCC Address

In the 5th text box from the top of each frame is the address of anyone else who should be getting a copy of this email but without the primary recipient's awareness. You may edit this content here, then click on [Update].

### .13.11.3.7 Subject

Found in the text box next to the bottom in the frame, this will be the content of the Subject line on the email. You may edit this content here, then click on [Update].

### .13.11.3.8 Content Type

The bottom text box within each frame is used to specify Content Type, if needed. You may edit this content here, then click on [Update].

## .13.11.4 Tool to add other Emails

### .13.11.4.1 Email Type (drop-down box)

Typical Email Types might include:

- Registration
- Confirmation
- Complete
- Back-Order
- Order Change
- Payment Retry
- Return Accepted
- Return Completed
- Return Cancelled
- Retrieve Password
- Tell-A-Friend
- Gift-Card Purchase
- Gift-Card Reload
- Quote Confirmation

### .13.11.4.2 Body Screen Location

Enter the location where the template text and commands exist on your server.

### .13.11.4.3 Attachment Screen Location (XSL-FO)

Enter the electronic location of any attachments that are to go out with the email message.

### .13.11.4.4 From Address

This will be your company email address to which the recipients can reply.

### .13.11.4.5 Cc Address

Enter the email address of anyone else besides the primary recipient who should be getting a copy of this email.

For example, on shipping you might CC the shipping department and the carrier.

### .13.11.4.6 Bcc Address

Enter the address of anyone who should be getting a copy of this email without the awareness of the primary recipient. This could be the QA department, the commissioned salesperson or someone monitoring performance.

### .13.11.4.7 Subject

Enter the Subject Line as it will appear in the recipient's email. Note the examples in the table shown above.

### .13.11.4.8 Content Type

If the Content Type needs to be noted, this is the place.

## .13.12 Surveys

### .13.12.1 EditProductStoreSurveys


Surveys can be started or deleted here in the Store. Survey content is created at the Content manager.

### .13.12.2 link buttons

[New Product Store] [Delete] [Add] [Store] [Roles] [Promos] [Catalogs] [Web Sites] [Shipping] [Payments][Emails] [Surveys] [Override] [Segments]

### .13.12.3 Table of existing surveys

Click on the description under the Survey column and you will be taken to the Content Manager - Surveys tab for editing the survey.

#### .13.12.3.1 Type

Surveys are grouped into Types; this column indicates which type this survey belongs to.

#### .13.12.3.2 Name

Not always assigned a Name; if there is one it will be here.

#### .13.12.3.3 Survey

Actually the Survey ID; click on the link to go to the Content Manager Survey Edit screen.

#### .13.12.3.4 Product

If there is a Product associated with this Survey, it will be given here.

#### .13.12.3.5 Category

Besides the Type of survey, here are the specific Groups of surveys identified, when they exist.

#### .13.12.3.6 From Date

When the Survey was established for this store.

#### .13.12.3.7 Sequence #

If there is a sequencing system in place, this is the sequence number for this survey.

## .13.12.4 Tool to Create Store Survey

### .13.12.4.1 Type (drop-down box)

Select from one of the following types:

- Add-To Cart
- Check-Out
- Customer Profile
- General Poll
- Purchase Order Item Placement
- Purchase Order Placement
- Random Poll
- Sales Order Placement

### .13.12.4.2 Group Name

If a survey group is established, enter the name here.

### .13.12.4.3 Survey (drop-down box)

This is the Survey ID. These are actually created in the Content Manager Surveys tab. Existing surveys populate the drop-down box. Select the appropriate one.

### .13.12.4.4 Product ID

If there is a product associated with the Survey, identify it here.

### .13.12.4.5 Category ID (drop-down box)

Select an applicable product Category ID from the drop-down box.

### .13.12.4.6 From Date (popup calendar)

Defaults to Now. Enter a future effectivity date if preferred.

### .13.12.4.7 Thru Date (popup calendar)

Optional; this would be the date the Survey should expire or terminate.

### .13.12.4.8 Survey Template Path

Server location of the Survey Template.

### .13.12.4.9 Result Template Path

Server location of the Results Template.

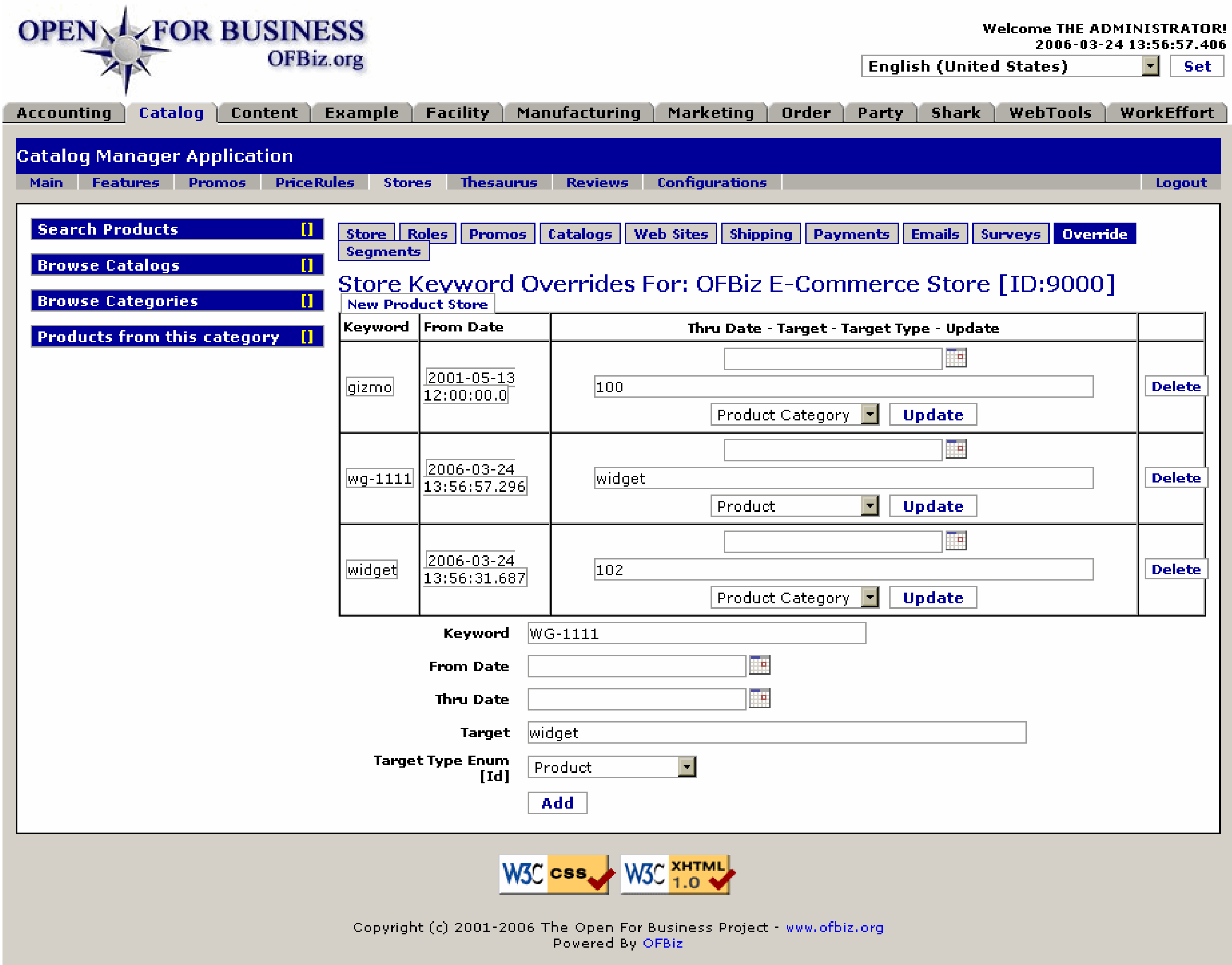
### .13.12.4.10 Sequence

If there is a sequence system, enter the sequence number here.

## .13.13 Override

(Product Store Keyword Override Settings)

## .13.13.1 editProductStoreKeywordOvrd




Use this screen to set Keywords to override existing Categories for a particular target and time period.

## .13.13.2 link buttons

[New Product Store] [Update] [Delete] [Add] [Store] [Roles] [Promos] [Catalogs] [Web Sites] [Shipping]

[Payments] [Emails] [Surveys] [Override] [Segments]

## .13.13.3 Table of existing overrides

### .13.13.3.1 Keyword

The Keyword that will override the Category.

### .13.13.3.2 From Date

When the keyword will begin to override the category.

### .13.13.3.3 Thru Date (popup calendar)

Date and time after which the keyword will no longer be overriding the category. You can change or set this date from within the table.

### .13.13.3.4 Target

This is the category or the product within a category that will be brought up in any search for the overriding keyword. You can edit this within the table.

### .13.13.3.5 Target Type (drop-down box)

The Target Type is essentially the category which holds the target which is being overridden. This can be changed within the table.

## .13.13.4 Tool to create new override settings

### .13.13.4.1 Keyword

The Keyword that will override the Category.

### .13.13.4.2 From Date (popup calendar)

When the keyword will begin to override the category.

### .13.13.4.3 Thru Date (popup calendar)

Date and time after which the keyword will no longer be overriding the category.

### .13.13.4.4 Target

This is the category or the product within a category that will be brought up in any search for the overriding keyword.

### .13.13.4.5 Target Type Enum ID (drop-down box)

The Target Type is essentially the category which holds the target which is being overridden. Typical types might include:

- Product Category
- Product
- OFBiz URL
- Absolute URL

## .13.14 Segments

### .13.14.1 ViewProductStoreSegments


Click the Segment ID to edit the Segment in the Marketing Manager - Segments tab where these are created.

### .13.14.2 link buttons

[New Product Store] [New Segment] [Delete] [Store] [Roles] [Promos] [Catalogs] [Web Sites] [Shipping][Payments] [Emails] [Surveys] [Override] [Segments]

### .13.14.3 Discussion

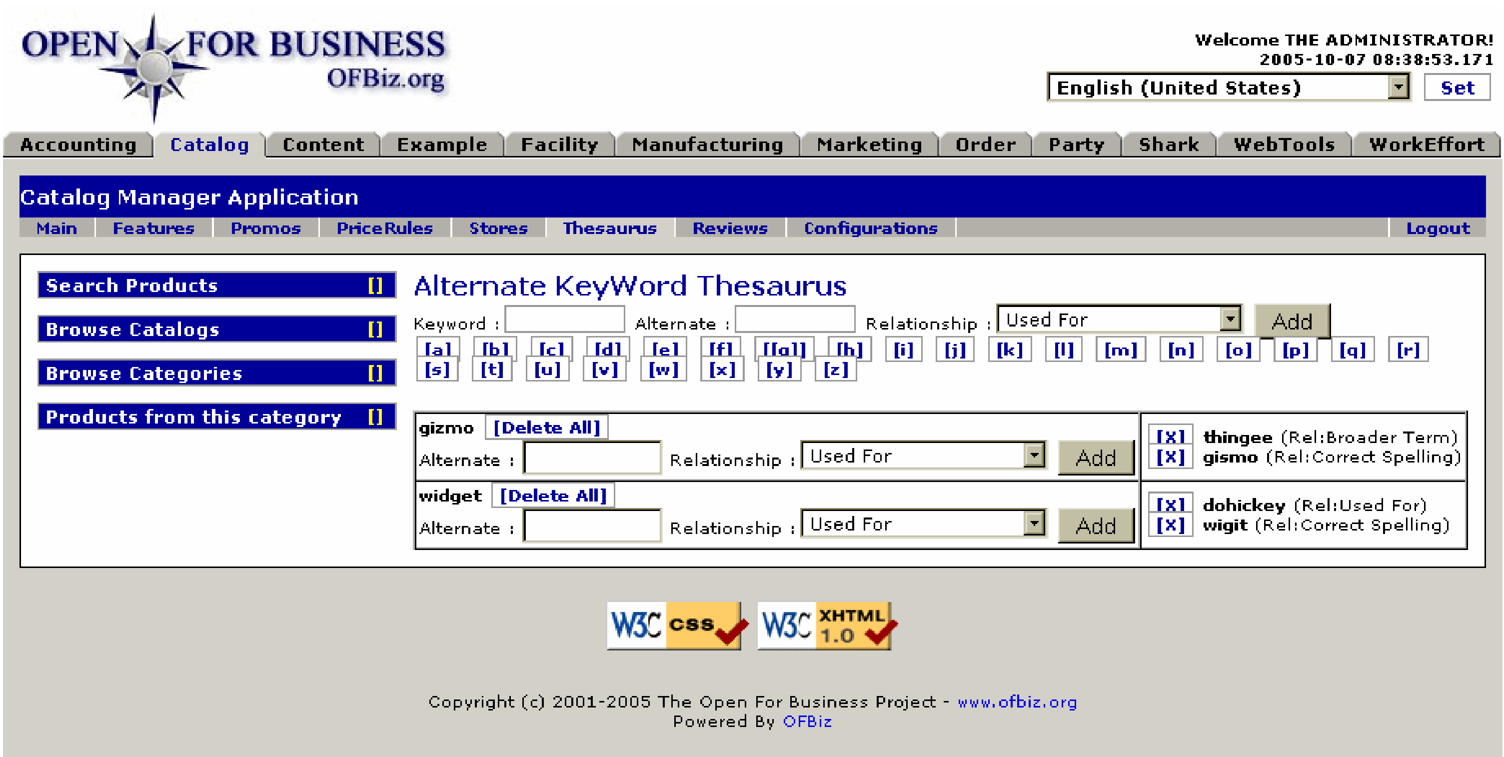
Whether you click on [New Segment] or click to [Edit] a Segment Group, you are taken to the Marketing Manager > Segment tab for the task. See Marketing Manager for more details.

## .13.15 Create New Product Store

When you click on the [Create New Product Store] link, you are taken to the same screen as Edit Store but without the other buttons (Roles, Promos, Catalogs, Etc.) as seen at Edit Store.

## .14 Tab - Catalog Thesaurus

### .14.1 editKeywordThesaurus




To ensure accuracy and completeness in searches and labels, a Thesaurus keeps words straight; use this screen to edit the terms.

### .14.2 link buttons

[Delete All] [X] [Add] [a] [b] [c] ...

### .14.3 Add to Alternate KeyWord Thesaurus

This powerful tool is very simple to use. As you enter a term, select its relationship to the alternate term using the drop down box choices. Once the Add button is selected, that term now exists in its established relationship to the other term.

The terms will be used by searches to find items which might be called other things by different people. For example, foreign terms or different spellings (color - colour) might prevent a search from being successful. Perhaps more powerfully, this method of expanding relationships can open more possibilities for sales through suggesting items which might not have been considered by the customer.

### .14.3.1 Keyword

The reference keyword.

### .14.3.2 Alternate

The spelling of a word as it might be sought; this term is being related to the keyword.

### .14.3.3 Relationship (drop-down box)

Choices could include:

- Used For
- Use Instead
- Correct Spelling
- Narrower Term
- Broader Term
- Micro-thesaurus Term
- Related Term
- Scope Notes
- Language: Spanish
- Language: French

## .14.4 Alphabet letter shortcut

[a] [b] [c] ...

## .14.5 Table to edit existing keywords

Click the [X] to delete a specific term. Use the space to add another relative term for this keyword, specify the Relationship from the drop down box, then click [Add].

# .15 Tab - Catalog Reviews

Pending Product Reviews are those reviews submitted which are still needing approval before they can be released for customers to see at the business site.

### .15.1 pendingReviews

OPEN FOR BUSINESS
OFBiz.org

Welcome THE ADMINISTRATOR!
2005-05-02 09:25:50.569

English (United States) | Set

Accounting | Catalog | Content | Facility | Manufacturing | Marketing | Order | Party | Shark | WebTools | WorkEffort

Catalog Manager Application

Main | Features | Promos | PriceRules | Stores | Thesaurus | Reviews | Configurations | Logout

Search Products []

Browse Catalogs []

Browse Categories []

Category Products []

# Pending Product Reviews

---

**Posted Date:** 2005-03-16 12:08:01.145
**Posted By:** THE ADMINISTRATOR
**Rating:** 4
**Is Anonymous:** Y
**Status:** Approve
**Review:** This is the greatest I have ever seen!
If it only came in turquoise, I would buy 2!

Save

---

**Posted Date:** 2005-03-29 02:26:24.864
**Posted By:** cata mom
**Rating:** 5
**Is Anonymous:** N
**Status:** Delete
**Review:** marbelous

Save

---

**Posted Date:** 2005-03-29 02:31:32.293
**Posted By:** cata mom
**Rating:** 5
**Is Anonymous:** Y
**Status:** Approve
**Review:** marbelous

Save

---

**Posted Date:** 2005-03-29 02:31:42.360
**Posted By:** cata mom
**Rating:** 5
**Is Anonymous:** Y
**Status:** Delete
**Review:** marbelous

Save

---

## .15.2 link buttons

[Save]

## .15.3 Posted Date

When the Review was posted.

## .15.4 Posted By

Who posted the Review.

## .15.5 Rating

How they rated the product.

## .15.6 Is Anonymous (Y/N)

If their Review is published, do they wish to remain anonymous?

## .15.7 Status (drop-down box)

Choices are:Pending ApprovalApprovedDelete

## .15.8 Review

Text as entered by the reviewer is shown here. You can make editorial revisions if needed. For example, the word 'marbelous' in a review could be changed to say 'Marvelous' without compromising the integrity of the review.

# .16 Tab - Configurations

## .16.1 FindProductConfigItems


Existing Configurations are presented upon opening the Configurations tab; [Edit] existing or [Create New Config Item] from here.

## .16.2 link buttons

[Create New Config Item] [Edit]

## .16.3 Table of Existing Configurations

Any existing configurations developed for products within this Catalog are presented here. This screen only appears when the Configurations tab is first selected. After selecting a specific Configuration to work with, you will need to reselect the Configurations Tab to return to this list.

### .16.3.1 Config Item

The ID and Name of the Configuration Item.

### .16.3.2 Type

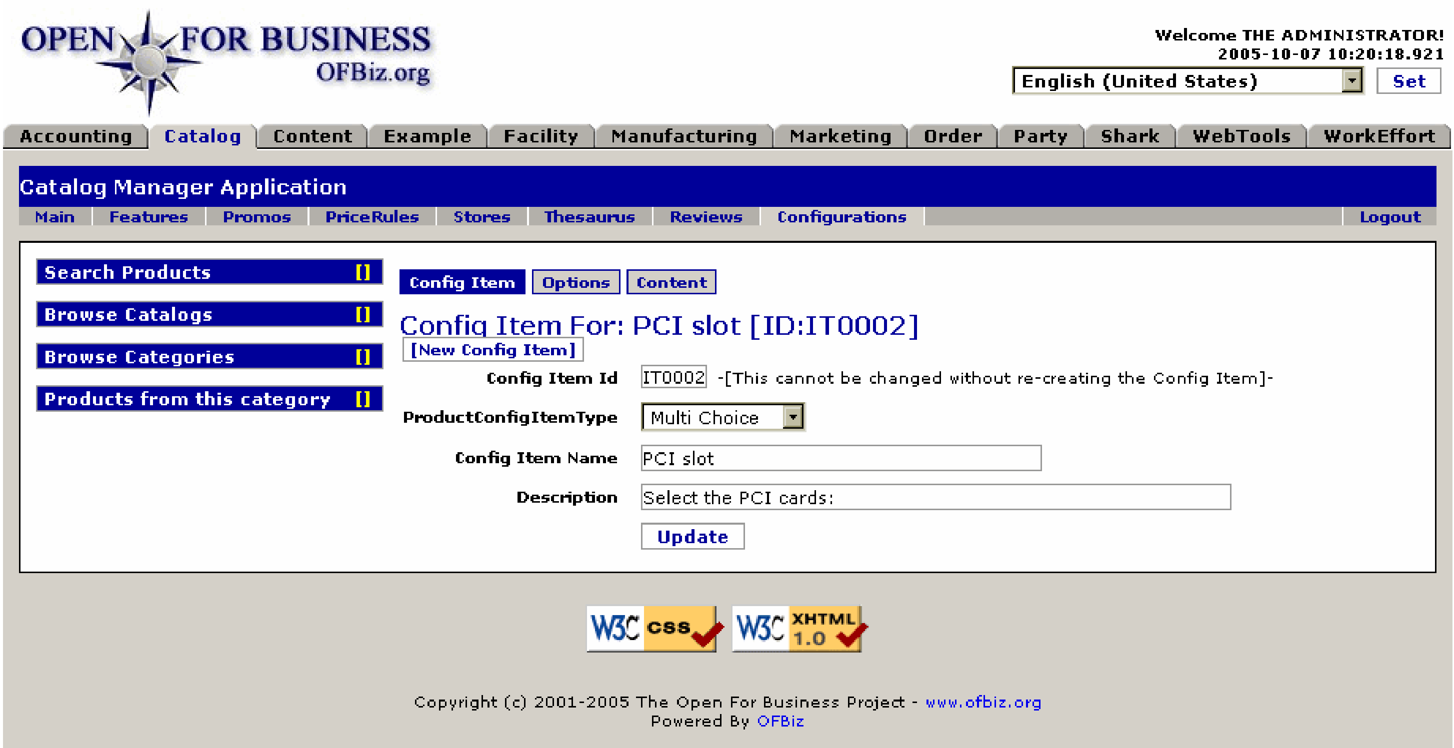
Called the ProductConfigItemType when selected from a drop-down box during the creation of a Configuration Item, this might be 'Single Choice' or 'Multi Choice.'

### .16.3.3 Description

What distinguishes this Item from others; what it is intended to accomplish. Could also be a leading question to the next step in the configuration process.

## .16.4 Edit an Existing Configuration

### .16.4.1 EditProductConfigItem




Anything about the Config Item except its ID can be edited here; press [Update] to complete.

### .16.4.2 link buttons

[New Config Item] [Update] [Config Item] [Options] [Content]

### .16.4.3 Config Item ID

Cannot be changed. Was assigned at creation, and can only be deleted as an Item.

### .16.4.4 ProductConfigItemType (drop-down box)

Selections at the present time include: Single ChoiceMulti Choice

### .16.4.5 Config Item Name

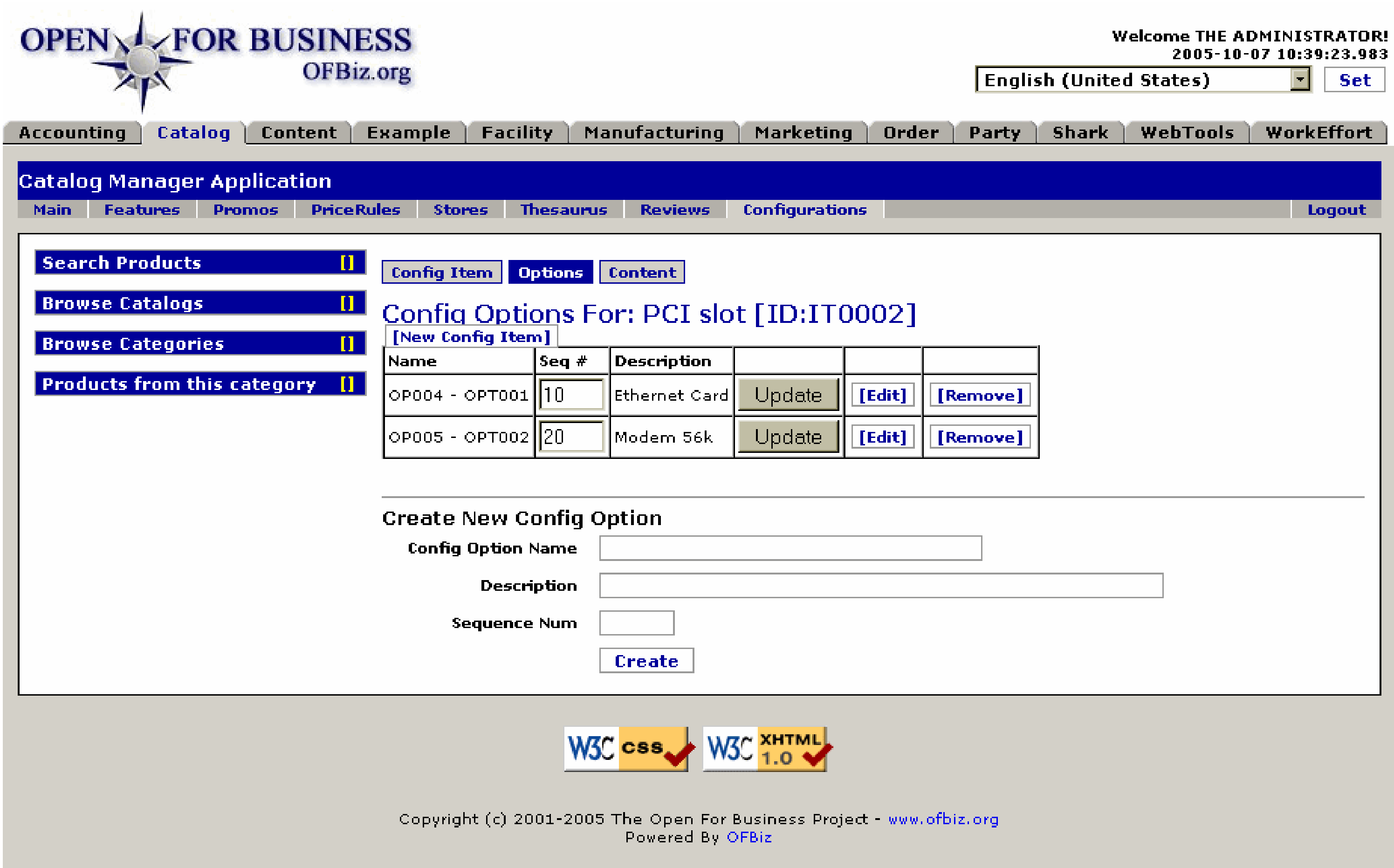
Very short name to differentiate this Item from others.

### .16.4.6 Description

Short but complete description about the purpose or function of this item.

# .16.4.7 Options Tab

## .16.4.7.1 EditProductConfigOptions




Options are viewed, edited and created from this Options screen.

## .16.4.7.2 link buttons

[New Config Item] [Update] [Edit] [Remove] [Create] [Config Item] [Options] [Content]

## .16.4.7.3 Table of Existing Options

### .16.4.7.3.1 Name

The first part of the name is the ID for the component, the second part is the Option ID. Thus, OP004 identifies the Ethernet Card, and the OPT001 specifies option.

#### .16.4.7.3.2 Seq #

Sequence Number changes are updated by pressing the [Update] button; press the [Edit] button to change other aspects of the option.

#### .16.4.7.3.3 Description

Describes what it is.

## .16.4.7.4 Create New Config Option tool

### .16.4.7.4.1 Config Option Name

Be very brief but descriptive.

#### .16.4.7.4.2 Description

Explain in a few words what is unique about this Option.

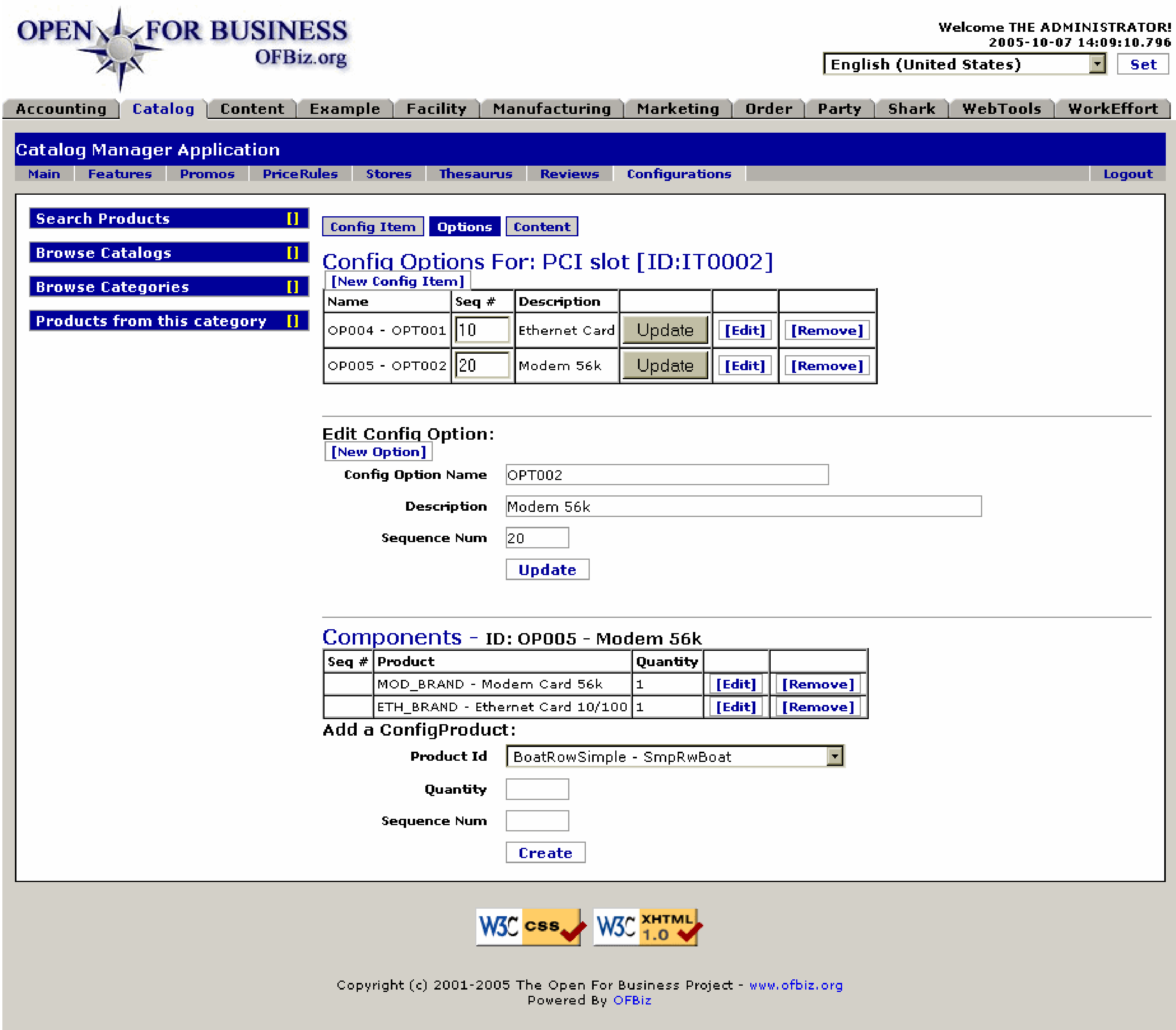
#### .16.4.7.4.3 Sequence Num

Optional; use if a sequencing system is in place.

### .16.4.7.5 Edit Existing Config Option

Whether creating a new or editing an existing Option, this is the expanded screen in which you will work.

## .16.4.7.5.1 EditProductConfigOptions-edit




The expanded Editing screen for Configuration Options carries forward from the previous screen with editing tools.

## .16.4.7.5.2 link buttons

[Update] [Edit] [Remove] [Create]

## .16.4.7.5.3 Components section

Note: other sections of this screen are discussed above.

### .16.4.7.5.3.1 Table of details in product option

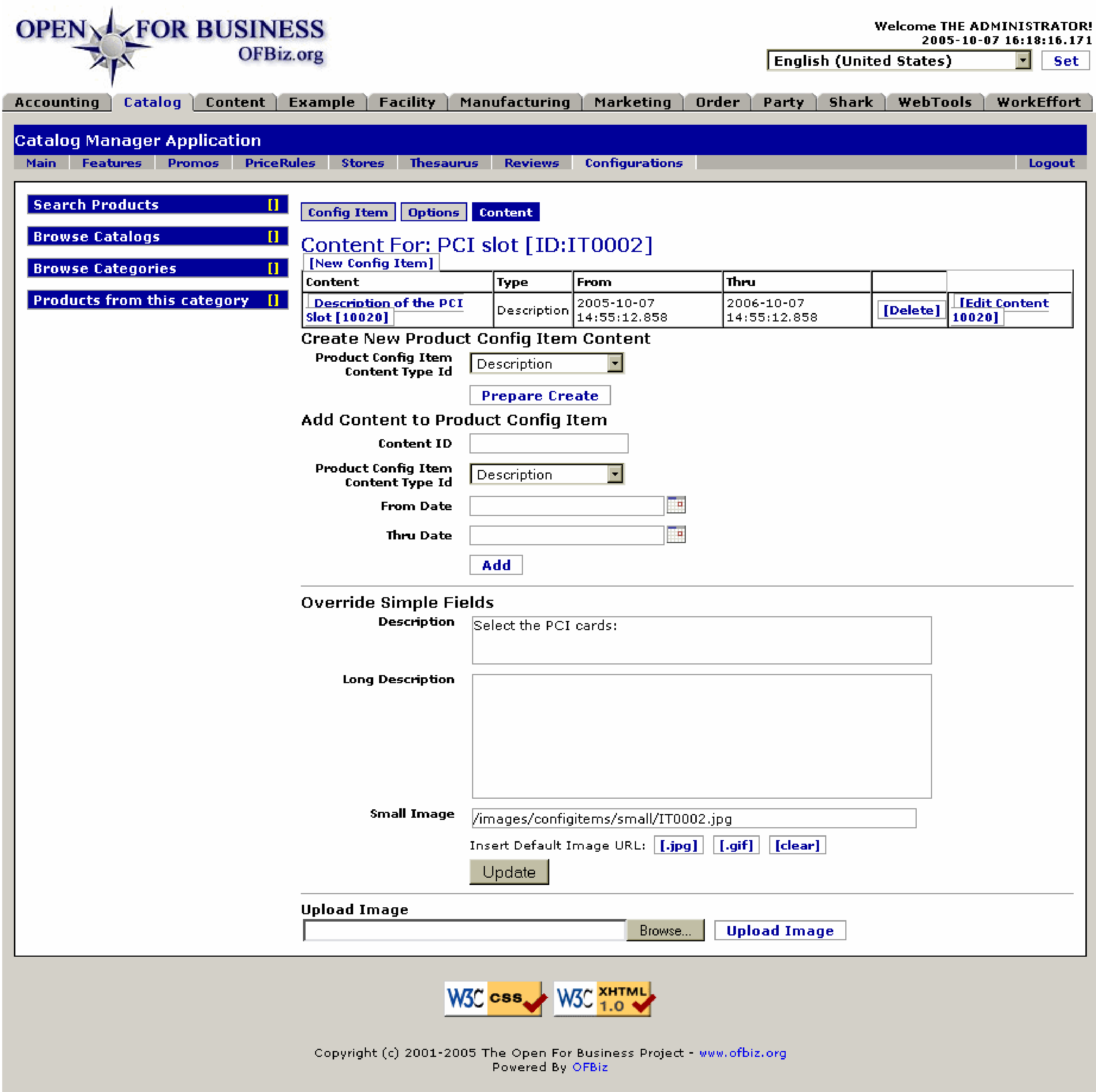
Sequence #ProductQuantity

### .16.4.7.5.3.2 Add a Config Product

Product ID (drop-down box)QuantitySequence num

## .16.4.8 Update Content of Existing Configuration

### .16.4.8.1 EditProductConfigItemContent




Update the Content of an existing Configuration Option from this screen.

## .16.4.8.2 link buttons

[New Config Item] [Delete] [Edit Content Nnnn] [Prepare Create] [Add] [Update] [Browse] [Upload Image] [Clear] [.jpg] [.gif] [Config Item] [Options] [Content]

## .16.4.8.3 Table of Existing Content

### .16.4.8.3.1 Content

Click on this descriptive title to go to the edit screen with this content.

### .16.4.8.3.2 Type

Single Choice or Multi-Choice

### .16.4.8.3.3 From

Date of creation or effectivity.

### .16.4.8.3.4 Thru

Date of expiration; leave blank unless the Content needs to terminate.

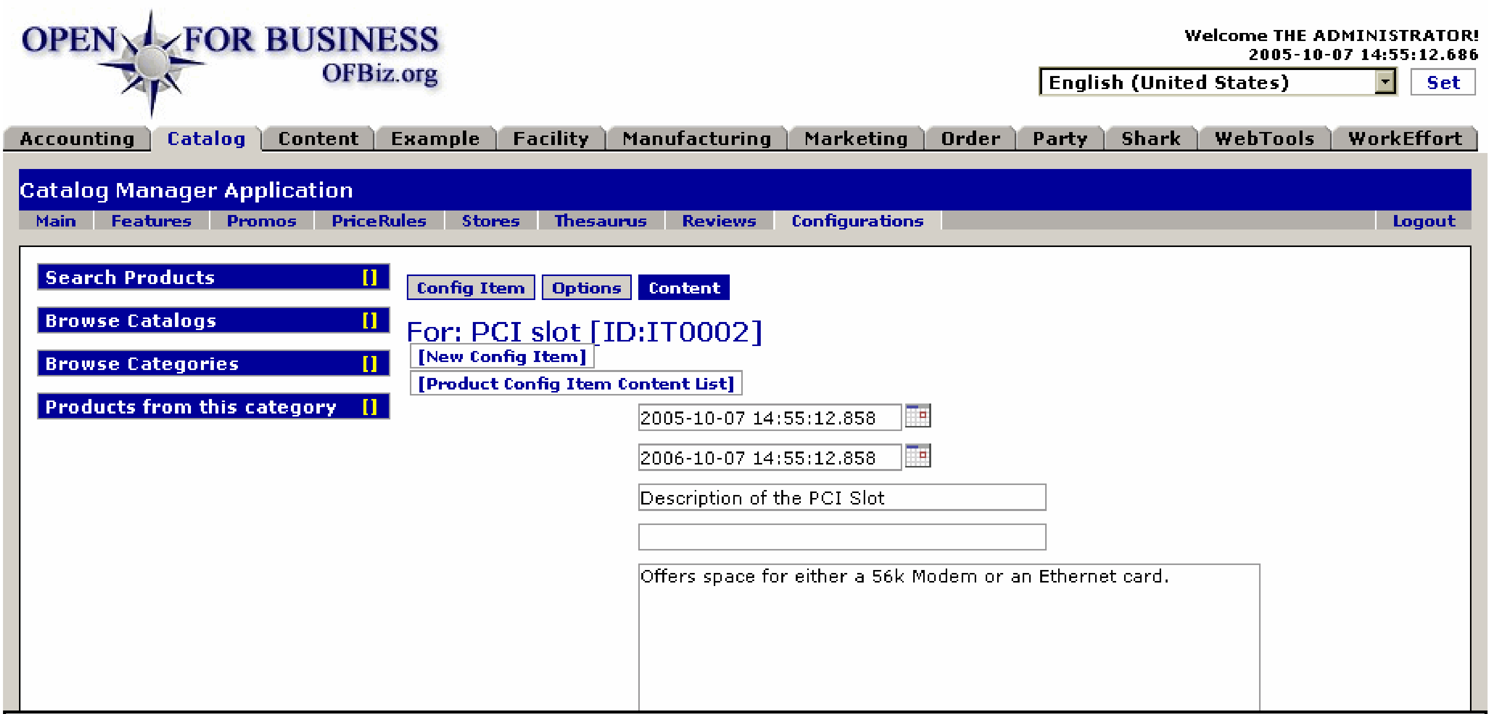
## .16.4.8.4 Create New Product Config Item Content

### .16.4.8.4.1 Product Config Item Content Type Id

Drop-down box includes these choices:

- Description
- Description - long
- Image
- Instructions

### .16.4.8.4.2 prepareAddContentToProductConfigItem




Add Content to the Configuration Item description.

### .16.4.8.4.3 link buttons

[New Config Item] [Product Config Item Content List] [Submit Query] [Config Item] [Options] [Content]

## .16.4.8.5 Add Content to Product Config Item

### .16.4.8.5.1 Content ID

Name or descriptive title for the Content.

### .16.4.8.5.2 Product Config Item Content Type Id (drop-down box)

Single Choice or Multi-Choice are presently available.

### .16.4.8.5.3 From Date (pop-up calendar)

Date of creation or effectivity.

### .16.4.8.5.4 Thru date (pop-up calendar)

Optional; content will expire on the date you enter.

## .16.4.8.6 Override Simple Fields

### .16.4.8.6.1 Description

Like a label or title.

### .16.4.8.6.2 Long Description

What you wish to say about the Configuration Item.

### .16.4.8.6.3 Small Image

'Insert Default Image URL:'

## .16.4.8.7 Upload Image

Either enter the path to the image file, or use the Browse search tool to locate the file. Then click [Upload Image].

# .16.5 Create a new Product Config

## .16.5.1 EditProductConfigItem-new


Start to create a New Config Item at this screen; press [Update] to continue editing and completing the Item.

### .16.5.2 link buttons

[Update]

### .16.5.3 Product Config Item Type (drop-down box)

Presently limited to Single Choice or Multi-Choice.

### .16.5.4 Config Item Name

The label which will become like an ID for this new Configuration Item.

### .16.5.5 Description

Describe it to differentiate from any other.

## .16.6 Testing New Configurations

### .16.6.1 At the ECommerce Site

#### .16.6.1.1 View Product Page

To test your configuration, go to the related product page at the ecommerce site and see the results of your configuration process. In the bottom of the page a form with the questions or options available will appear.

#### .16.6.1.2 Compare Content with Configuration

The messages, images, or instructions are taken from the content attached to the questions you have created as outlined in the processes described above. Check that the results match your expectations when you created the content configuration questions and dialog

#### .16.6.1.3 Check the Prices

The options prices are derived from the product's prices attached to the selected options and they are used to determine the total configuration price. That final price is shown when the customers click over the 'verify' link. You should confirm that the pricing process deals appropriately with the pricing guidelines.

### .16.6.2 Warehouse and Manufacturing Operations

#### .16.6.2.1 Check the Order Detail Page

When an order is created for a configured product, a production run is automatically created and linked to the order line. You can see it in the order detail page. The production run will take components from the warehouse for each of the products linked to the selected options.

#### .16.6.2.2 Check for Manufacturing Tab

In creating a production run, the product is linked to a routing; this is done in the manufacturing component and then seen under the new 'manufacturing' tab in the product's pages.

## .17 Tab - Subscription

## .18 Tab - Shipping

# Chapter 7: Order Manager

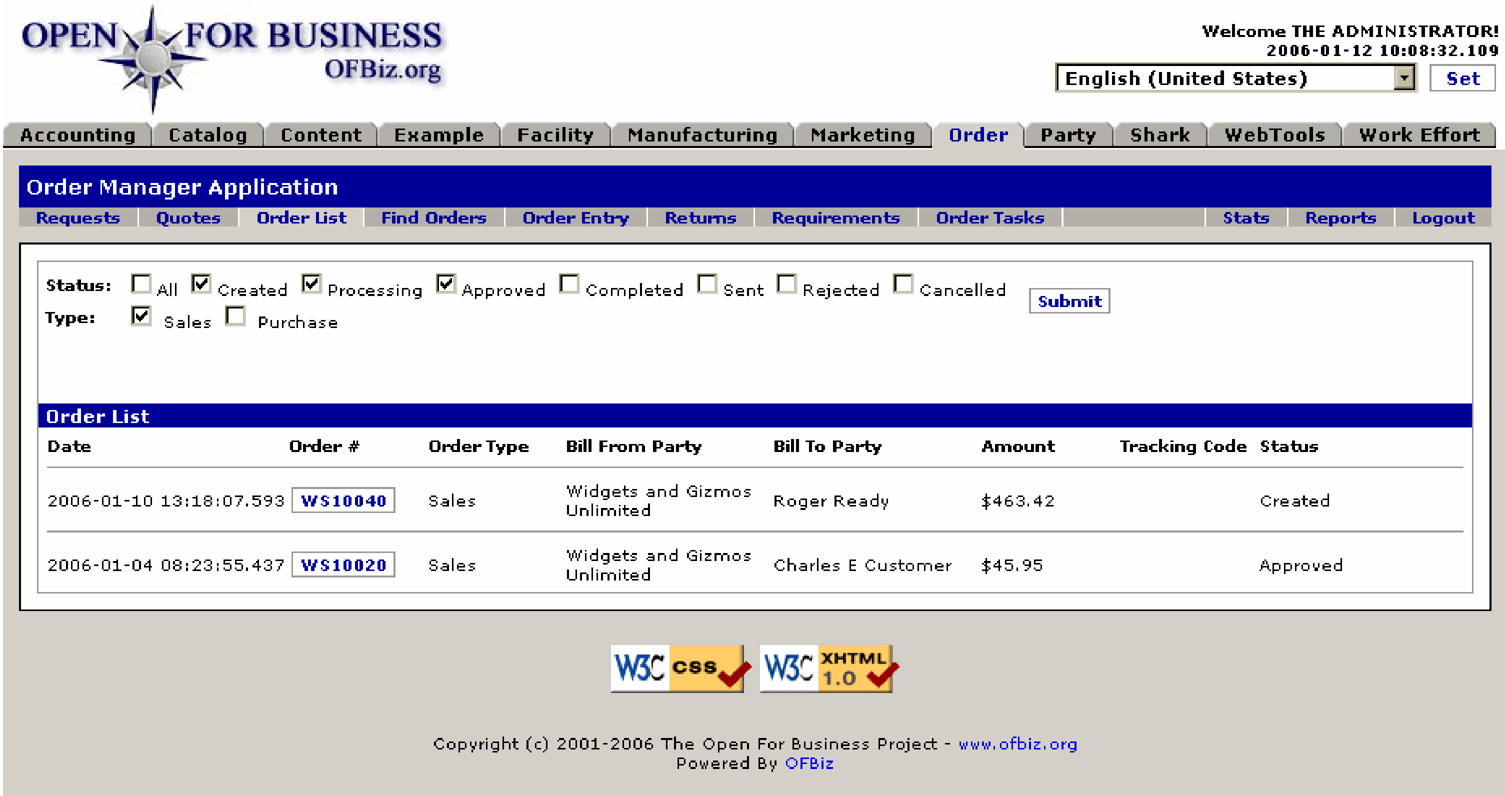
## .1 Introduction

### .1.1 Discussion

The Order Manager opens by default to the Order List tab so that you can quickly find existing orders by Status and Type. From that opening screen, you can select a particular Order with which to work, or choose another tab, such as Quotes to begin your effort.

See the Sales Order Process section of Application Overview For Users for a more extensive discussion of the Sales Order procedures.

### .1.2 FirstScreen




This screen, probably much more full of orders!, will greet you. Use the parameter boxes to reduce the size.

### .1.3 First screen presented

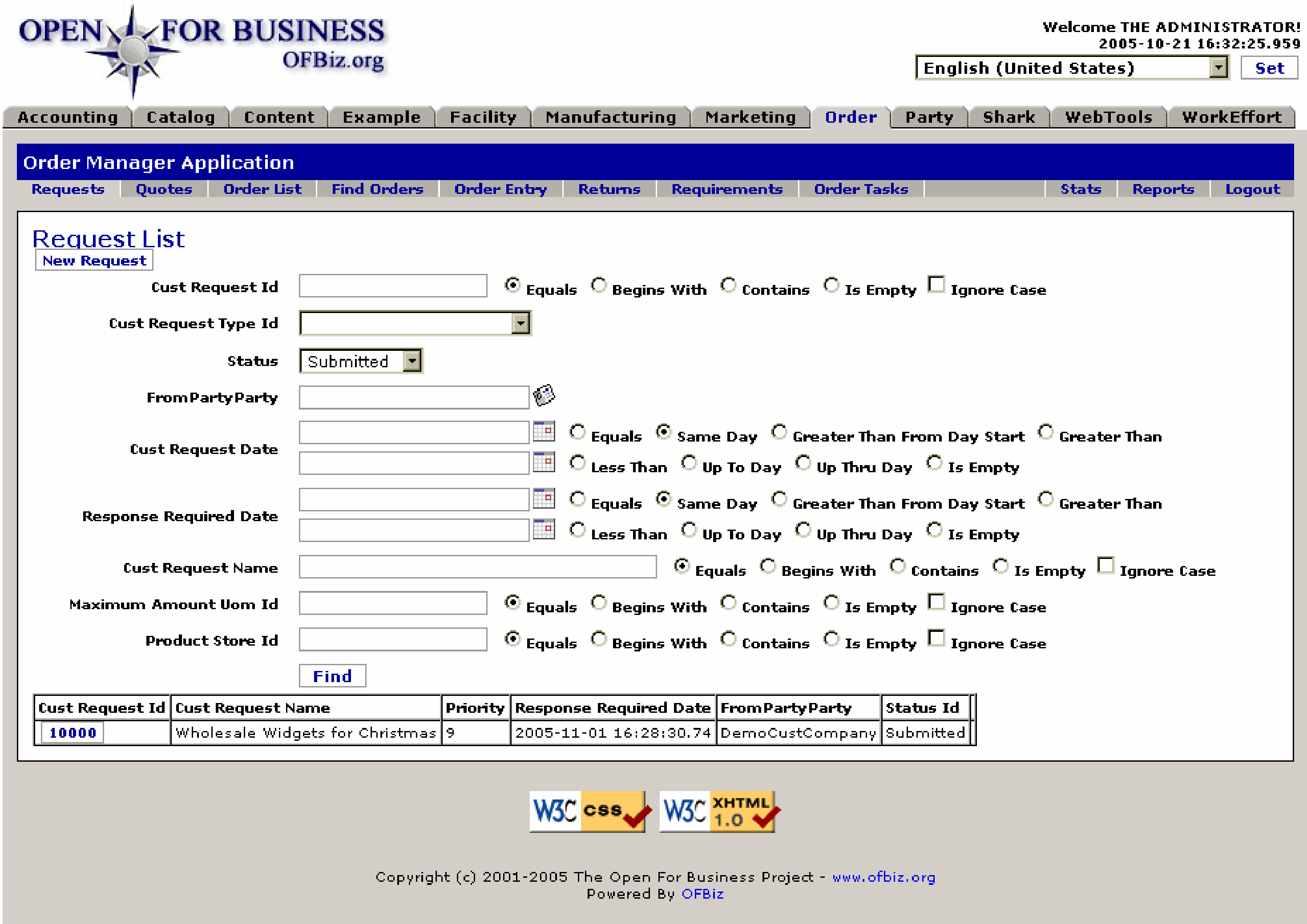
By default, the first screen shown when opening the Order Manager is the Order List screen, under the assumption that most anticipated work will begin with selecting an existing order to work from. We show you that screen here, but the discussion in this document will follow the tabs from left to right. Therefore, to see more about the Order List screens, please select that section, below.

## .2 Requests

### .2.1 Introduction

Requests is the place to handle the documentation of RFQs (Requests for Quotation) and other items needing a response. Documenting the request when it arrives will assure a record of the request associated with a record of the response.

## .2.2 FindRequests




First screen under the Requests tab is a table of current requests with a search tool. Click on the Cust Request ID to view or edit.

## .2.3 link buttons

[New Request] [Find]

## .2.4 Search tool

### .2.4.1 Cust Request ID

Select a radio button for: Equals / Begins With / Contains / Is Empty; check box to Ignore Case.

### .2.4.2 Cust Request Type ID (drop-down box)

Request Types could include one of the following:

- Request For Bug Fix
- Request For Catalog
- Request For Feature
- Request For Information
- Request For Proposal
- Request For Quote
- Request For Support

### .2.4.3 Status (drop-down box)

Status types could include one of the following:

- Submitted
- Accepted
- Reviewed
- Completed
- Rejected
- Canceled

### .2.4.4 From Party (popup search tool)

Enter the ID of the Party asking the Request or use the search tool to identify the Party ID.

### .2.4.5 Cust Request Dates

Enter one of two dates with a qualifying radio button for: Equals / Same Day / Greater Than From Day Start / Greater Than // OR Less Than / Up To Day / Up Thru Day / Is Empty.

### .2.4.6 Response Required Date

Enter one of two dates with a qualifying radio button for: Equals / Same Day / Greater Than From Day Start / Greater Than // OR Less Than / Up To Day / Up Thru Day / Is Empty.

### .2.4.7 Cust Request Name

Select a radio button for: Equals / Begins With / Contains / Is Empty; check box to Ignore Case.

### .2.4.8 Max Amount Uom ID

Search on the UOM for the request by Currency.

### .2.4.9 Product Store (drop-down box)

Select the Product Store from the drop-down box.

## .2.5 Table of requests

### .2.5.1 Cust Request ID

This is the number generated by the system which identifies the Customer Request throughout its life.

### .2.5.2 Cust Request Name

As a number is difficult to remember, the name you give the Customer Request will identify the Request for you.

### .2.5.3 Priority

What level of importance do YOU attach to this Request? Some will naturally be more time critical or more business essential than others. Use the Priority system to keep these relative matters in perspective.

### .2.5.4 Response Required Date

Most Requests will be accompanied with a date by which the information MUST be provided. Often times, the Request has little value if not submitted by this date.

### .2.5.5 FromPartyParty

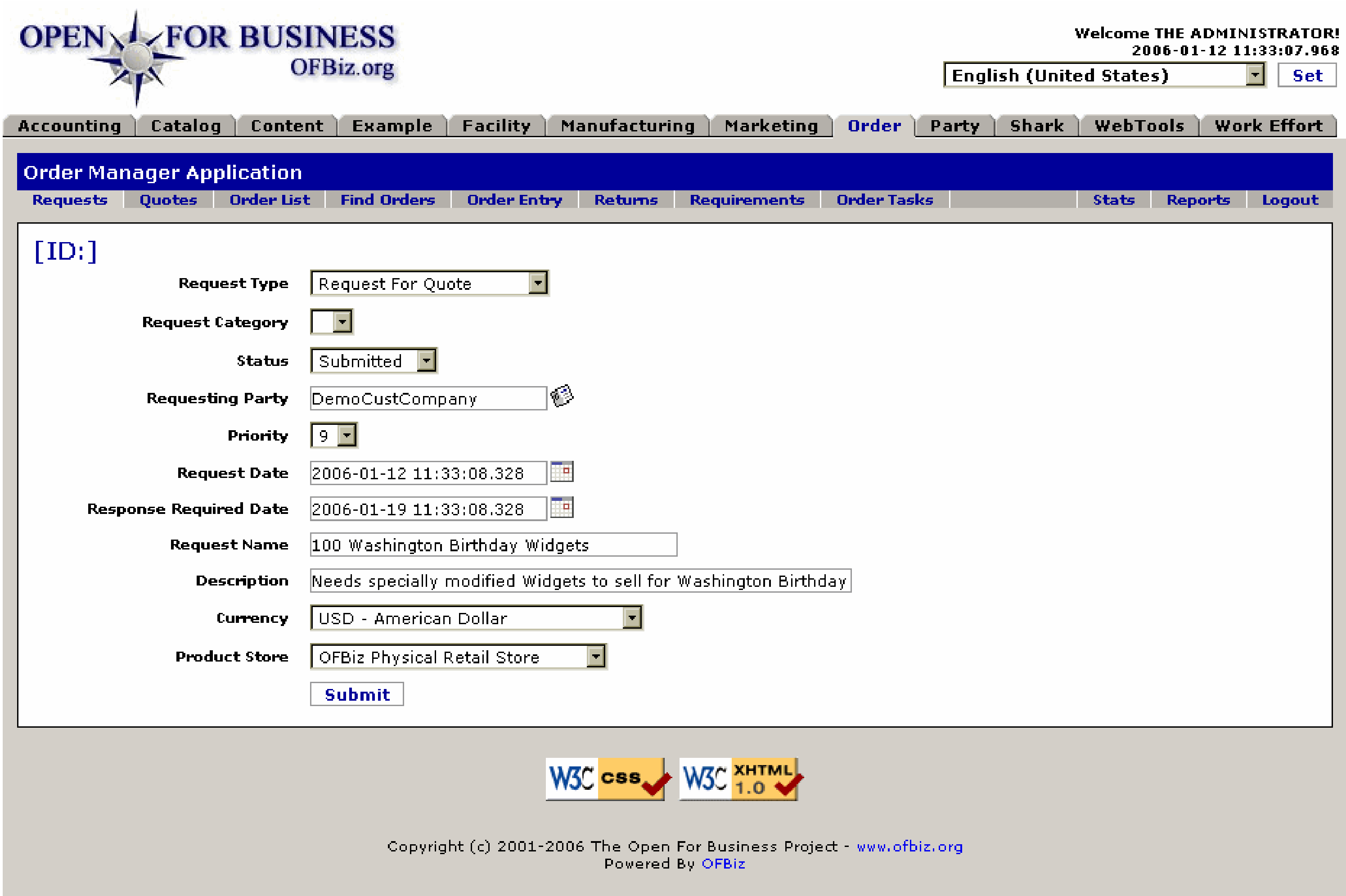
The requesting Party: the one expecting a response to the Request.

### .2.5.6 Status ID

Where is this Request in its progress through the system? Has it just been entered? Has it been fulfilled? The Status needs to reflect what is happening with the Request itself.

## .2.6 Create a new request

### .2.6.1 request-new




When entering information from a new Request, be as complete as possible; additional data can be added from the Edit screen.

### .2.6.2 link buttons

[Submit]

### .2.6.3 Request Type (drop-down box)

Request Types could include one of the following:

- Request For Bug Fix
- Request For Catalog

- Request For Feature
- Request For Information
- Request For Proposal
- Request For Quote
- Request For Support

## .2.6.4 Request Category (drop-down box)

For future use with Categories of Requests.

## .2.6.5 Status (drop-down box)

Status types could include one of the following:

- Submitted
- Accepted
- Reviewed
- Completed
- Rejected
- Canceled

## .2.6.6 Requesting Party (popup search box)

Since the entry is to be made from the search tool which only calls up existing parties, if this is from a party not previously corresponding with your company, you will first need to Create the Party in the Party Manager.

## .2.6.7 Priority (drop-down box)

You may assign a numbered Priority of 1 to 9.

## .2.6.8 Request Date (popup calendar)

The date the Request was made by the Requester.

NOTE: This does NOT automatically populate when entered into the system. This may be the date the original requestor placed on his Request, so you would want to enter that date. When he calls to enquire, he might ask about his 'Request of May 14th,' for example.

### .2.6.9 Response Required Date (popup calendar)

This is the date by which the requestor expects to hear back from you with his information.

### .2.6.10 Request Name

This is the name associated with the Request, not the name of the requestor. For example, if this is a Request for Proposal, the name might be something like:

RFP to Build 10 Chess-playing Widgets

### .2.6.11 Description

Enter enough detail so that others could understand the nature of the Request. Exact details will be entered from an editing screen.

### .2.6.12 Common Currency (drop-down box)

The national currency under which prices are quoted.

### .2.6.13 Product Store (drop-down box)

The Product Store which needs to respond to the Request. Select from the drop-down box.

## .2.7 Edit existing requests

### .2.7.1 View Request tab

#### .2.7.1.1 ViewRequest


Presents the Request information in a professional layout, suitabble for printing or analysis. Work in progress.

### .2.7.1.2 link buttons

New Request] [New Quote] [View Request] [Request] [Request Roles] [Request Items]

### .2.7.1.3 Request ... Information

The basic details about the Request. See the Request tab descriptions for more information about the fields.

### .2.7.1.4 Dates

Important dates associated with the Request. See the Request tab for more information about these fields.

### .2.7.1.5 Request Items

What Product or service is being requested, with amounts and costs.

## .2.7.2 Request tab

### .2.7.2.1 EditRequest


Edit an existing Request, starting with this screen. Move on to the other sub-tabs as part of the development process.

### .2.7.2.2 link buttons

[Submit] [View Request] [Request] [Request Roles] [Request Items]

### .2.7.2.3 Request Type (drop-down box)

Request Types could include one of the following:

- Request For Bug Fix
- Request For Catalog
- Request For Feature
- Request For Information
- Request For Proposal
- Request For Quote
- Request For Support

### .2.7.2.4 Request Category (drop-down box)

For future use.

### .2.7.2.5 Status (drop-down box)

Status types could include one of the following:

- Submitted
- Accepted
- Reviewed
- Completed
- Rejected
- Canceled

### .2.7.2.6 Priority (drop-down box)

When time is running short, the priority has to increase. Assigning a meaningful Priority helps management make informed decisions.Select from priorities 1 - 9, 1 being highest.

### .2.7.2.7 Request Date (popup calendar)

Date of the original Request from the requester.

### .2.7.2.8 Response Required Date (popup calendar)

When the Requester expects to receive a response.

### .2.7.2.9 Request Name

The name by which the Request is called.

## .2.7.2.10 Description

What is wanted by the Requester.

## .2.7.2.11 Currency (drop-down box)

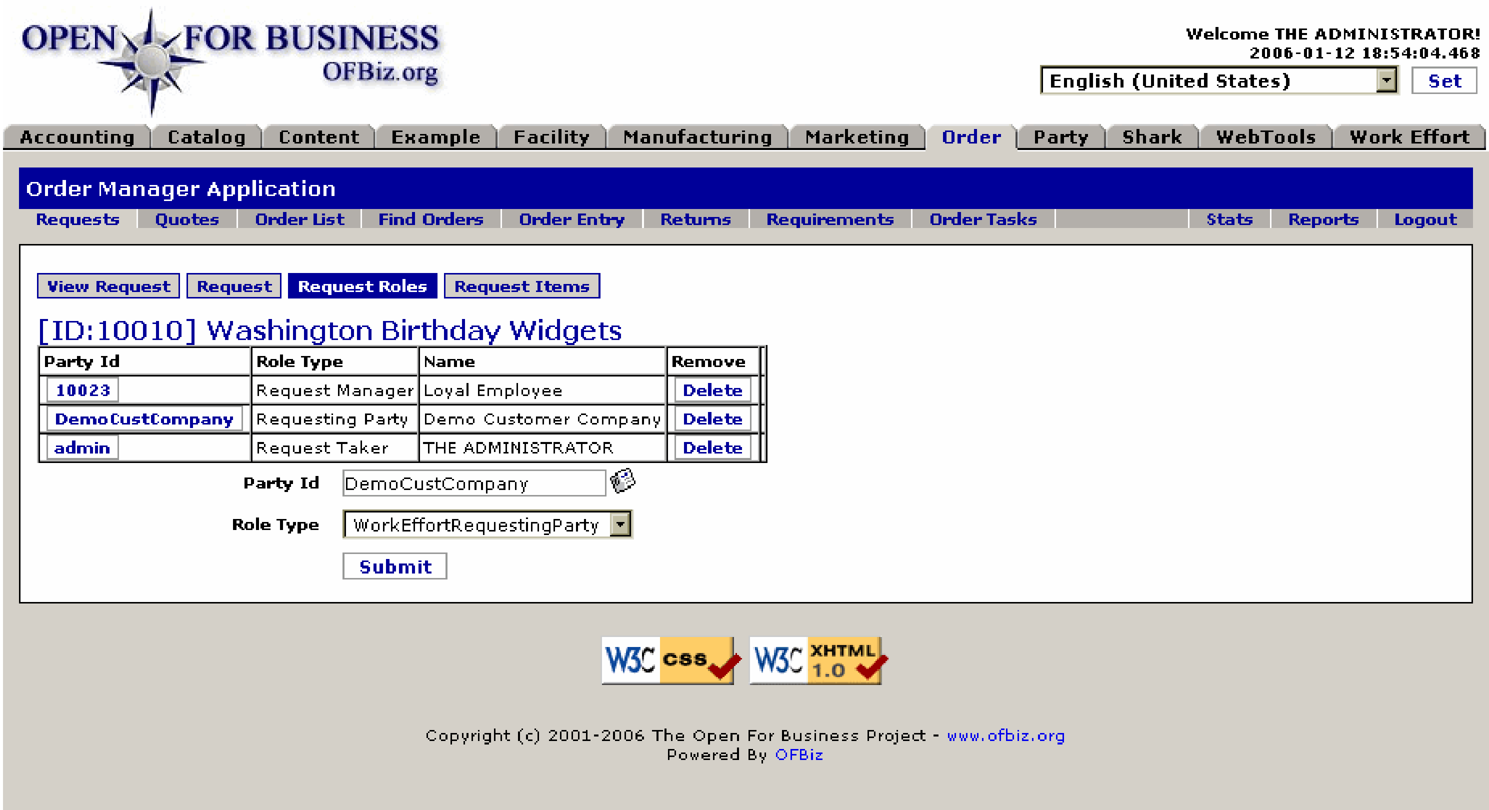
What national currency will form the basis of the response?

## .2.7.2.12 Product Store (drop-down box)

Which Store needs to reply to this Request.

# .2.7.3 Request Roles tab

## .2.7.3.1 requestroles




Roles for each Party involved in the Request can be identified, added or removed at this screen.

## .2.7.3.2 link buttons

[Delete] [Submit] [View Request] [Request] [Request Roles] [Request Items]

## .2.7.3.3 Table of parties and roles

Manager Reference: Order

### .2.7.3.3.1 Party ID

Click on the Party ID and you are taken to the Profile screen for this Party on the Party Manager.

### .2.7.3.3.2 Role Type

The Role Type for this Party in this Request process.

### .2.7.3.3.3 Name

The Name of the Party as specified for the selected Party ID.

### .2.7.3.3.4 Remove

Click on the [Delete] link to remove the Party with its Role from this Request.

## .2.7.3.4 Tool to associate Party ID and Role

### .2.7.3.4.1 Party ID (popup search tool)

Find the Party from the popup tool or accurately enter the ID if known.

### .2.7.3.4.2 Role Type (drop-down box)

Role Type could include one of the following:

- WorkEffortRequestingParty
- Order Agent
- Request Taker
- Request Manager

## .2.7.4 Request Items tab

### .2.7.4.1 requestitems


Click on the Cust Request ID number to edit the Request Item.

### .2.7.4.2 link buttons

Manager Reference: Order

[New Request Item] [View Request] [Request] [Request Roles] [Request Items]

### .2.7.4.3 Cust Request ID

When the Cust Request ID is clicked, you are taken to the OrderItems tab with more options for editing the Request. This path is also followed when processing Quotes.

### .2.7.4.4 Status ID

Where is this Request in its progress through the system? Has it just been entered? Has it been fulfilled? The Status reflects what is happening with the Request itself.

### .2.7.4.5 Priority

The Priority established for this Request to compare it with other Requests.

### .2.7.4.6 Sequence Num

If a sequencing system is in place, this is the assigned sequence number.

### .2.7.4.7 Required By Date

When the response to the Request is required.

### .2.7.4.8 Product ID

Actually both the Product ID and its Name.

### .2.7.4.9 Quantity

How many units of the requested Product are sought.

### .2.7.4.10 Selected Amount

Price of the Product selected.

### .2.7.4.11 Maximum Amount

Quantity times the Selected Amount.

### .2.7.4.12 Description

Information about the product or service.

#### .2.7.4.13 Story

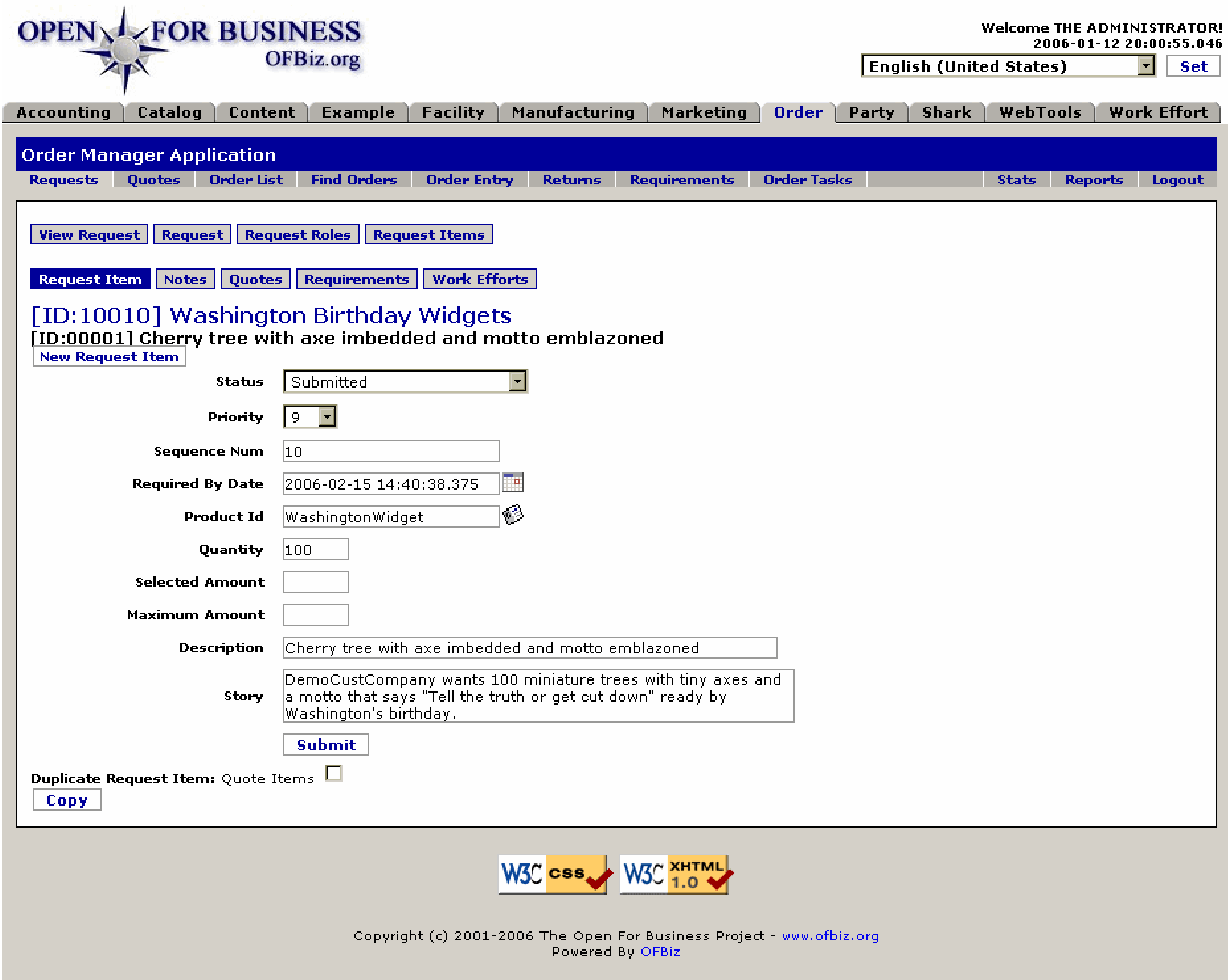
Why this Request has been made of your company or department.

### .2.7.5 Request Item tab

#### .2.7.5.1 Request Item tab

This and the remaining tabs do not appear until a Request Item's 'Cust Request Id' is selected and clicked upon under the Request Items tab.

## .2.7.5.2 Request-OrderItem




Similar to the screen for creating a new Request Item, this screen opens access to additional sub-tabs.

## .2.7.5.3 link buttons

[New Request Item] [Submit] [Copy] [View Request] [Request] [Request Roles] [Request Items] [Request Item] [Notes] [Quotes] [Requirements] [WorkEfforts]

## .2.7.5.4 Status (drop-down box)

Possible Status could be:

Submitted

- Accepted
- Rejected
- Canceled
- —
- Review
- Request (Reviewed)
- Cancel Request (Canceled)

NOTE: Status choices may be different after it has been Accepted.

## .2.7.5.5 Priority (drop-down box)

The Priority established for this Request to compare it with other Requests. Select 1 - 9 from the drop-down box.

## .2.7.5.6 Sequence Num

If there is a sequencing system in place, this is where the Sequence Number is added.

## .2.7.5.7 Required By Date (popup calendar)

When the Response to the Request is required by the requestor.

## .2.7.5.8 Product ID (popup search box)

Only one Product ID can be found in a Quote Item. Narrow this one down to the clearly defined Product requested by this item within the request. Either enter the Product ID or use the popup search tool.

## .2.7.5.9 Quantity

How many are being considered by this request.

## .2.7.5.10 Selected Amount

The cost for the selected item.

### .2.7.5.11 Maximum Amount

This could be the Maximum price the customer is willing to pay, or it could be the maximum units acceptable to get a price break. In the latter case, for example, he might be asking for 20, but he could get an excellent price break at 24.

### .2.7.5.12 Description

Additional details about this item. Description is an opportunity to confirm in words that the Product ID matches what the customer wants. If the Product ID is GZ-1000 but the Description says Square Gizmo, then there is a problem; GZ-1000 is for the Tiny Gizmo.

### .2.7.5.13 Story

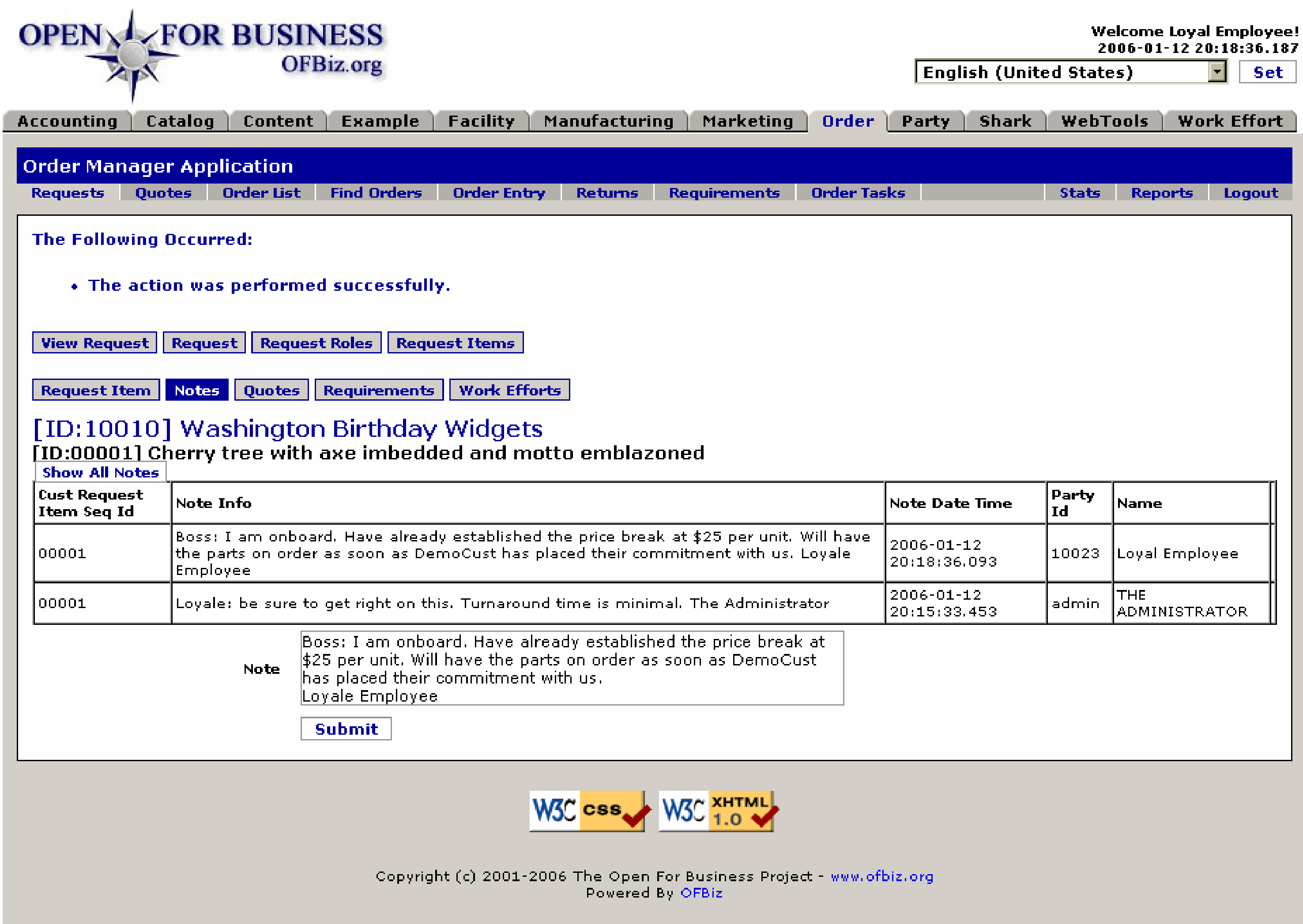
What is being sought in this Request. Here the customer's 'story' is summarized. Include whatever details can help you keep the customer happy. If the Salesman promised extra features for the same price, explain that here.

### .2.7.5.14 Duplicate Request Item

Check the box to copy this item over to the Quotes.

## .2.7.6 Notes tab

### .2.7.6.1 requestitemnotes




Notes for just this Item Seq ID or select [Show All Notes] displayed in the table. Add another Note in the box with [Submit].

### .2.7.6.2 link buttons

[Show All Notes / Show This Item's Notes] [Submit] [View Request] [Request] [Request Roles] [Request Items] [Request Item] [Notes] [Quotes] [Requirements] [WorkEfforts]

## .2.7.6.3 Table of existing Notes

### .2.7.6.3.1 Cust Request Item Seq ID

Identifies the specific Item to which the Note is directed.

### .2.7.6.3.2 Note Info

Within handling limits, the entire text of the Note will appear in this box.

### .2.7.6.3.3 Note Date Time

When the Note was posted.

### .2.7.6.3.4 Party ID

The identity of the Party that posted the Note.

### .2.7.6.3.5 Name

The Name of the Party that posted the Note.

## .2.7.6.4 Tool to add a Note

Enter text in the box and press Submit. The Note will be posted against the selected Cust Request Item Seq Id and carry the identity of the Party that presses the Submit button.

## .2.7.7 Quotes tab

### .2.7.7.1 RequestItemQuotes


Established Quotes associated with this Request are shown here.

### .2.7.7.2 link buttons

[OrderNewQuoteItemForQuote] [View Request] [Request] [Request Roles] [Request Items] [Request Item] [Notes] [Quotes] [Requirements] [WorkEfforts]

### .2.7.7.3 Quote ID

This new Quotation gets its own identity with this Quote ID.

### .2.7.7.4 Product ID

Which Product is being Quoted.

### .2.7.7.5 Work Effort ID

The ID of the Work Effort event.

### .2.7.7.6 Quantity

How many.

### .2.7.7.7 Selected Amount

The standing price or amount for the selected product.

### .2.7.7.8 Quote Unit Price

The special price established for this Quotation.

### .2.7.7.9 Estimated Delivery Date

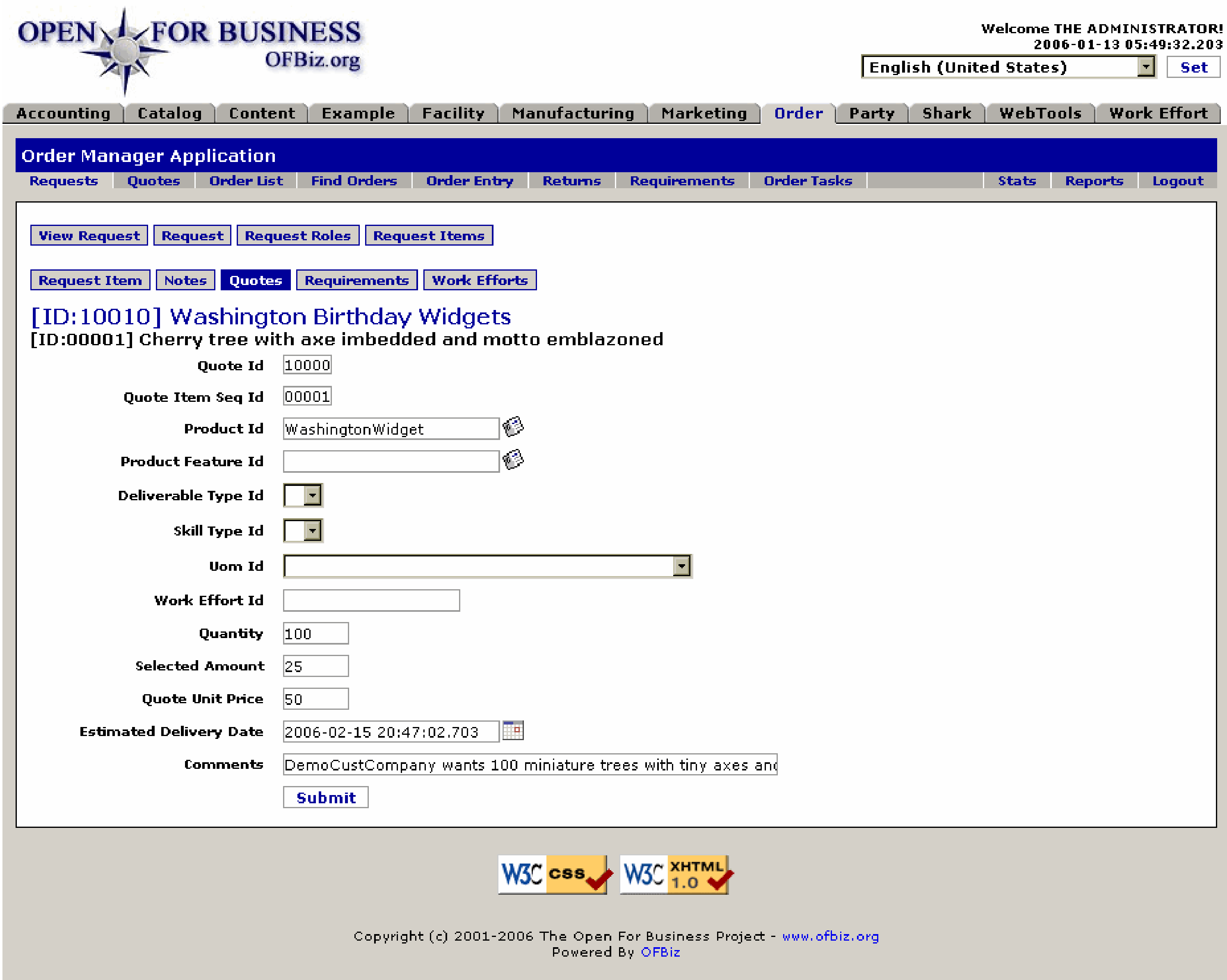
When this Product should be delivered.

### .2.7.7.10 Is Promo

Yes or No: is this a Promotional item.

## .2.7.7.11 OrderNewQuote ItemFor Quote

### .2.7.7.11.1 EditQuoteItemForRequest




When you have selected a Request Item then come to this screen, some data is populated. Complete the rest as needed.

### .2.7.7.11.2 link buttons

[Submit] [View Request] [Request] [Request Roles] [Request Items] [Request Item] [Notes] [Quotes] [Requirements] [WorkEfforts]

### .2.7.7.11.3 Quote ID

The system assigns this number.

### .2.7.7.11.4 Quote Item Seq ID

The Item from the original Request that is being quoted for.

### .2.7.7.11.5 Product ID (popup search tool)

The Product being quoted for this Item Seq ID.

### .2.7.7.11.6 Product Feature ID (popup search box)

Select the Features of a Virtual or assembled Item to be included.

### .2.7.7.11.7 Deliverable Type ID (drop-down box)

If there is a deliverable Type, select from the drop-down box.

### .2.7.7.11.8 Skill Type ID (drop-down box)

If there is a skill type, select from the drop-down box.

### .2.7.7.11.9 UOM ID (drop-down box)

The national currency upon which the quote is based.

### .2.7.7.11.10 Work Effort ID

The ID of the Work Effort event.

### .2.7.7.11.11 Quantity

How many of the Product are being quoted for.

### .2.7.7.11.12 Selected Amount

How much the Selected items regularly sell for.

### .2.7.7.11.13 Quote Unit Price

The derived price determined for this quotation, based upon the volume and other factors.

### .2.7.7.11.14 Estimated Delivery Date (popup calendar)

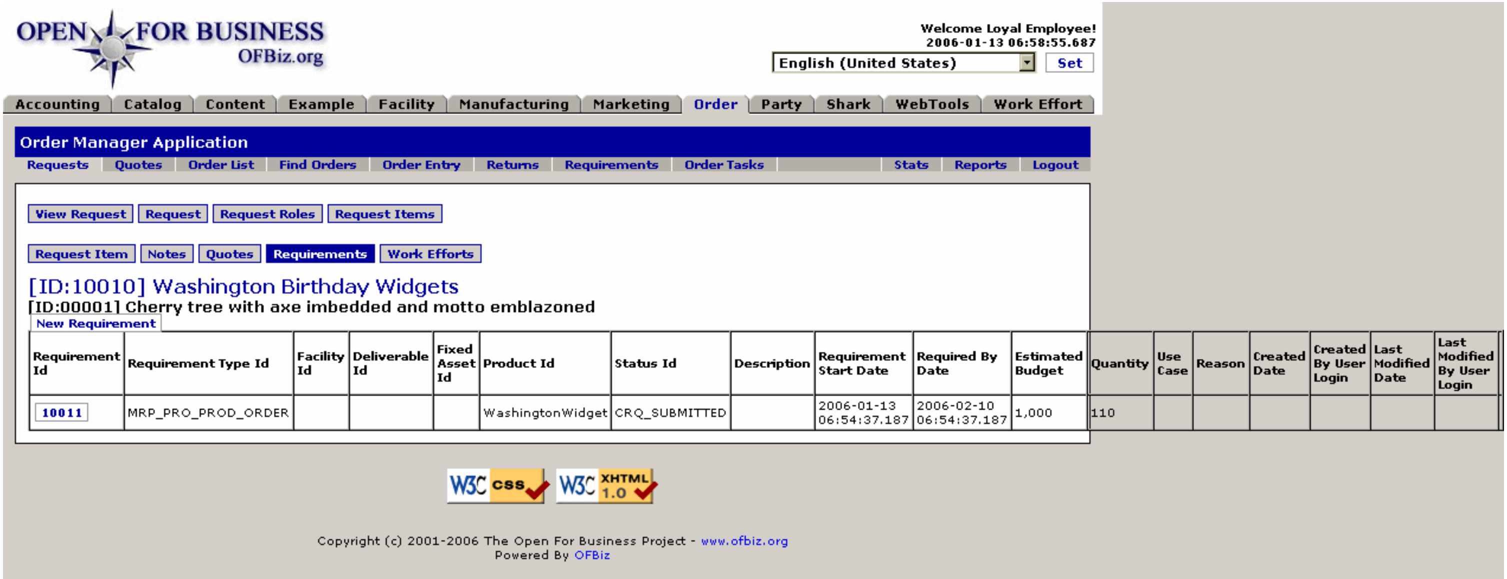
When the Product can reasonably delivered to match both the customer's needs and your capabilities.

### .2.7.7.11.15 Comments

Other information pertinent to the Quotation.

## .2.7.8 Requirements tab

### .2.7.8.1 requestitemrequirements




Requirements are needed to initiate work in the production side of the company. Created under the major Requirements tab, they are displayed here in table form.

### .2.7.8.2 link buttons

[New Requirement] [View Request] [Request] [Request Roles] [Request Items] [Request Item] [Notes] [Quotes] [Requirements] [WorkEfforts]

### .2.7.8.3 Requirement ID

The system-generated number assigned to this Requirement. Click on this number to edit the Requirement under the major Requirements tab.

### .2.7.8.4 Requirement Type ID

What generated this Requirement? Initially selected from a drop-down list under the Requirements tab.

### .2.7.8.5 Facility ID

Which Facility will be performing the work under this Requirement?

### .2.7.8.6 Deliverable ID

If there is a Deliverable involved, this identies it.

### .2.7.8.7 Fixed Asset ID

If a Fixed Asset is to be used in the fulfillment of this Requirement, it is identified here.

### .2.7.8.8 Product ID

The ID of the Product being quoted which forms the basis for this Requirement.

### .2.7.8.9 Status ID

The Status of this Requirement as it moves from submission through completion.

### .2.7.8.10 Description

What needs to be done to accomplish this Requirement?

### .2.7.8.11 Requirement Start Date

When effort under this Requirement needs to begin.

### .2.7.8.12 Required By Date

When the effort under this Requirement needs to be completed.

### .2.7.8.13 Estimated Budget

How much money is available to accomplish this Requirement.

### .2.7.8.14 Quantity

How many units need to be completed.

### .2.7.8.15 Use Case

If needed, the Use Case will be shown here.

### .2.7.8.16 Reason

Why this Requirement was instituted.

### .2.7.8.17 Created Date

Date the Requirement was created.

### .2.7.8.18 Created By User Login

User Login of the Party that created the Requirement.

### .2.7.8.19 Last Modified Date

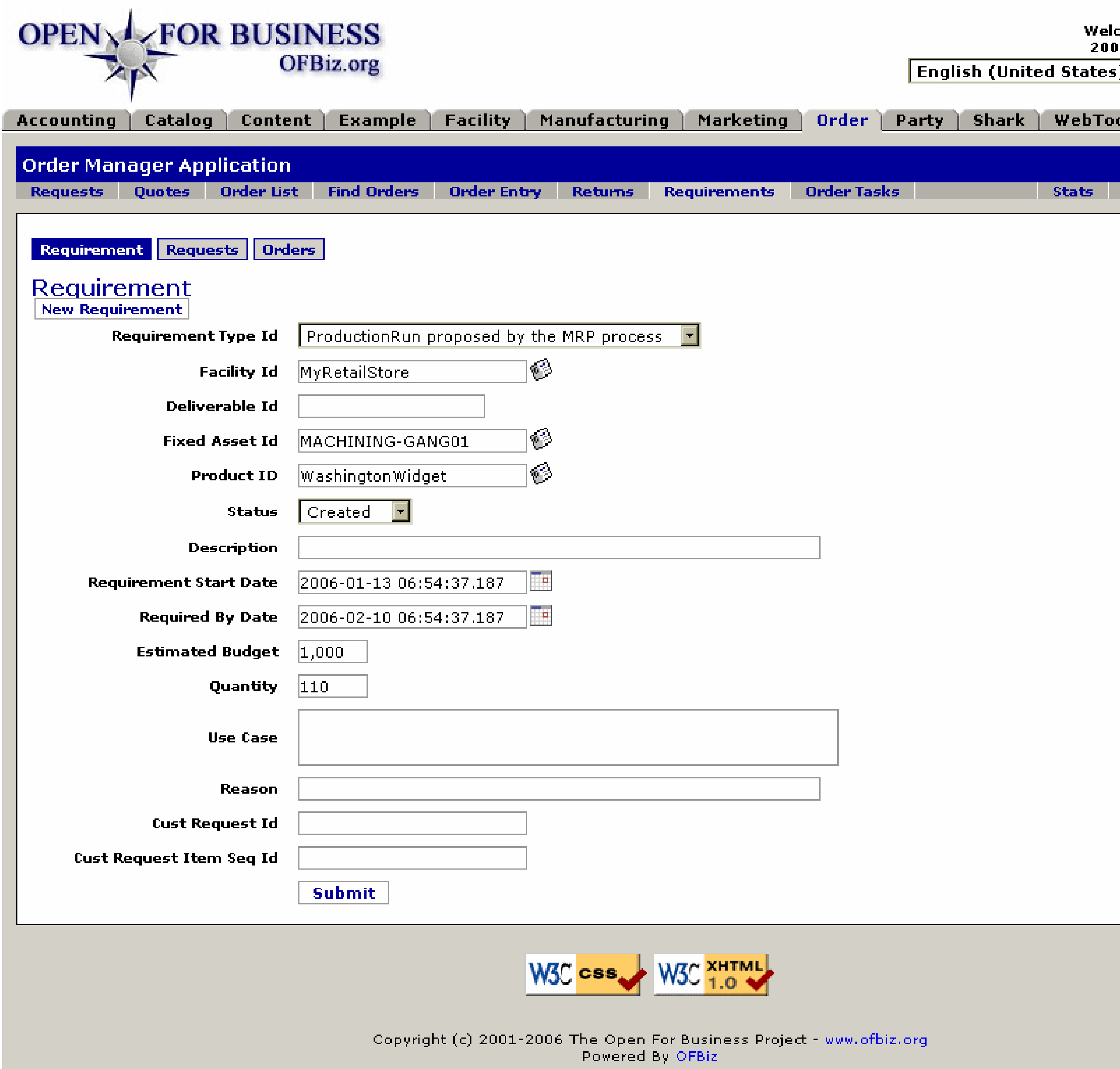
Date the Requirement was last modified.

### .2.7.8.20 Last Modified By User Login

Who last modified the Requirement, by User Login.

## .2.7.8.21 Edit or Create New Requirement

### .2.7.8.21.1 EditRequirement




Requirements are both created and edited at this screen which is actually under the major Requirements tab of O

### .2.7.8.21.2 Discussion

See the major tab Requirements for a discussion of this screen. The contents of the table above derive from input at this screen. To come to this screen from the table, either click on the Requirement ID number or select [New Requirement].

## .2.7.9 Work Efforts tab

### .2.7.9.1 EditRequestItemWorkEffort


Work Effort items are created under the Work Effort manager. Use the search tool to add to this Request Item.

### .2.7.9.2 link buttons

[New Request Item] [Add] [View Request] [Request] [Request Roles] [Request Items] [Request Item] [Notes] [Quotes] [Requirements] [WorkEfforts]

### .2.7.9.3 Table of Work Effort IDs

Only the Work Effort IDs are listed in the table. Click on the ID to view or edit; click on [Delete] to remove. Use the tool below to bring in more Work Effort items.

## .2.7.9.4 Tool to add Work Effort ID

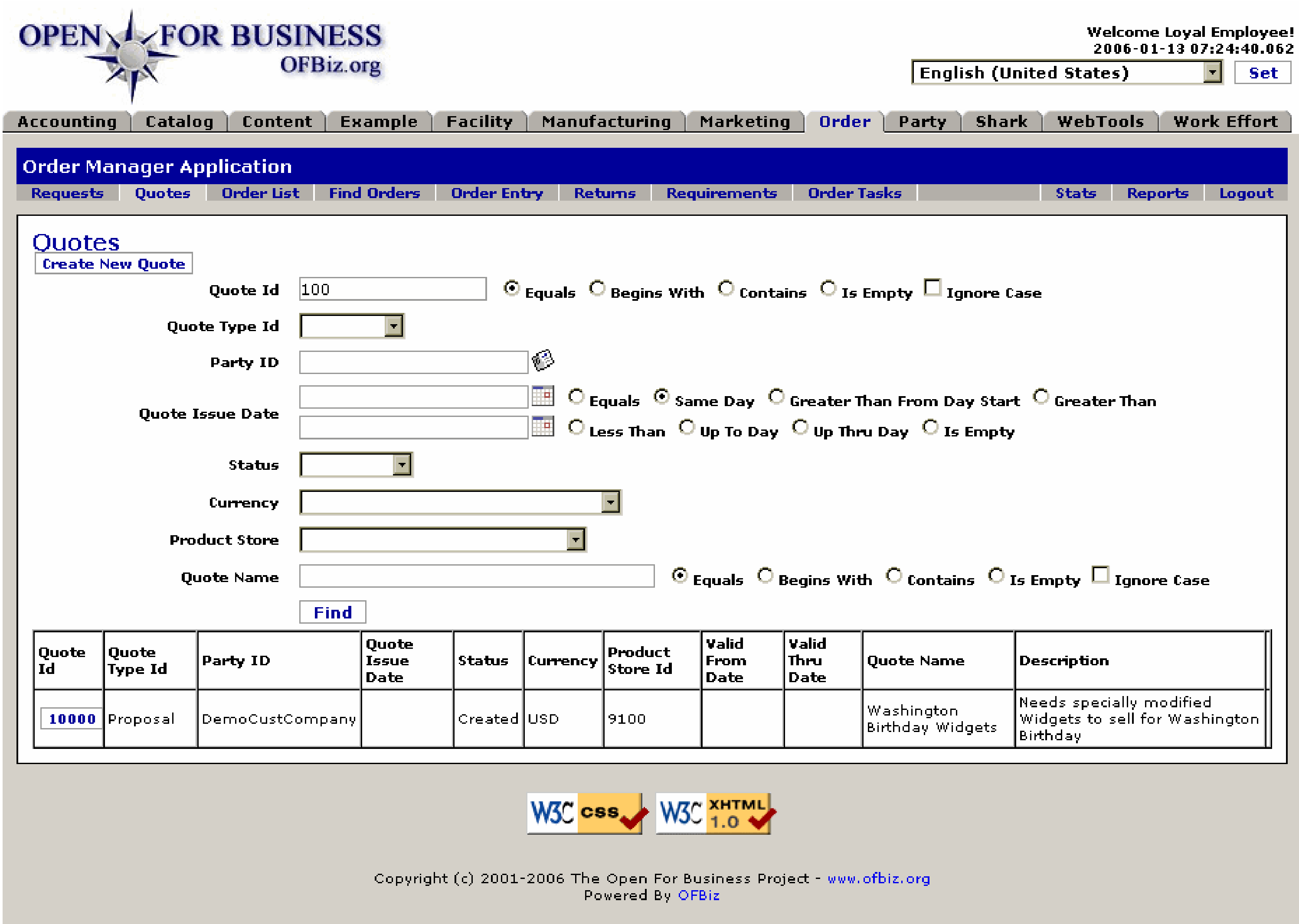
Either enter the ID or use the popup search tool to locate appropriate Work Effort IDs to use with this Request Item.

# .3 Quotes

## .3.1 Order Quote

Order Quote is a place to prepare and document quotations to prospective purchasers or contractors.

## .3.2 FindQuote




First screen under the Quotes tab presents a search tool with a table of found Quotes. Click on the ID number to edit.

## .3.3 link buttons

[Create New Quote] [Find]

## .3.4 Search for existing quotes

### .3.4.1 Quote ID

Radio buttons for: Equals / Begins With / Contains / Is Empty. Check the box if the search is to disregard the UPPER or lower Case of the letters.

Enter as much of the Quote ID that can be recalled, then select the radio button which best describes the data you entered. For example, if you enter the number 1 and click the Begins With button, the search will return all Quotes that start with the digit '1'.

### .3.4.2 Quote Type ID (drop-down box)

Choices include Other, Product, and Proposal. Addition choices could be programmed in.

This describes which category of quotation is sought.

### .3.4.3 Party ID

Popup search box for locating the assigned ID of the Party to whom the quotation was directed. This assumes that the Party was identified within your system.

### .3.4.4 Quote Issue Date

Popup calendars and Radio Button search descriptors help you narrow down the date when the quotation was issued.

### .3.4.5 Status (drop-down box)

Status could be:

- Created
- Approved
- Ordered
- Rejected

### .3.4.6 Common Currency (drop-down box)

Select the type of currency: USD (for American dollars), Dinars, Reals, etc.

### .3.4.7 Product Store (drop-down box)

Select from the drop-down box.

### .3.4.8 Quote Name

Radio buttons for: Equals / Begins With / Contains / Is Empty. Check the box if the search is to disregard the UPPER or lower Case of the letters.

Enter as much of the Quote Name that can be recalled, then select the radio button which best describes the data you entered.

## .3.5 Table of current quotes

### .3.5.1 Quote ID

Click on the Quote ID to bring up the editing tool with the selected quote ready for updating.

### .3.5.2 Quote Type ID

This field is discussed below under Quote - (Edit or Create).

### .3.5.3 Party ID

This field is discussed below under Quote - (Edit or Create).

### .3.5.4 Quote Issue Date

This field is discussed below under Quote - (Edit or Create).

### .3.5.5 Status

This field is discussed below under Quote - (Edit or Create).

### .3.5.6 Common Currency

This field is discussed below under Quote - (Edit or Create).

### .3.5.7 Product Store ID

This field is discussed below under Quote - (Edit or Create).

### .3.5.8 Valid From Date

This field is discussed below under Quote - (Edit or Create).

### .3.5.9 Valid Thru Date

This field is discussed below under Quote - (Edit or Create).

### .3.5.10 Quote Name

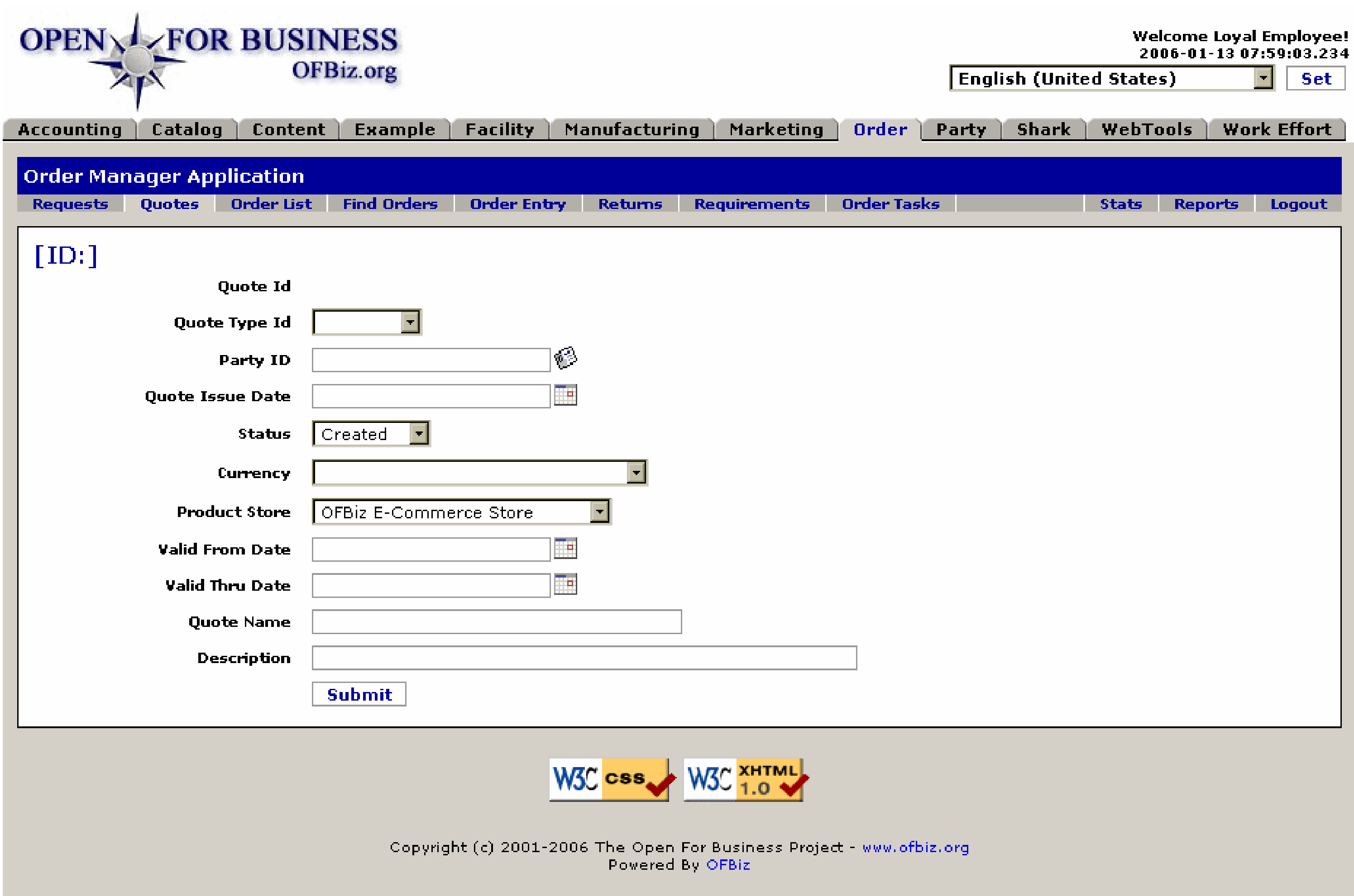
This field is discussed below under Quote - (Edit or Create).

### .3.5.11 Description

This field is discussed below under Quote - (Edit or Create).

## .3.6 Create New Quote

### .3.6.1 EditQuote-new




Create new Quotes from this screen. You will enter greater detail under the Edit screens.

### .3.6.2 link buttons

[Submit]

### .3.6.3 Quote ID

This cannot be changed without creating a new quote. The Quote ID is the number which pulls all the details of the quotation together. It will not be created until you [Submit] the new Quote.

### .3.6.4 Quote Type ID (drop-down box)

Other, Product, and Proposal are generic types; others could be programmed in.

### .3.6.5 Party ID (popup search tool)

Popup search engine provides help locating the ID number for the Party to whom the quotation was directed.

### .3.6.6 Quote Issue Date (popup calendar)

This is the date that the Quote is given to the party requesting it, not necessarily the date it was prepared.

### .3.6.7 Status (drop-down box)

Status could be:

- Created
- Approved
- Ordered
- Rejected

### .3.6.8 Currency (drop-down box)

Choose the currency used as the basis of this quotation from the drop-down box: US Dollars, Lira, Dinars, Reals, etc.

### .3.6.9 Product Store (drop-down box)

When your business includes more than one entity, this is where you specify which is offering the Quotation.

### .3.6.10 Valid From Date (popup calendar)

Prices are only good for a certain period of time. Your suppliers might raise (or lower!) their prices, manufacturing expenses (energy, etc.) might increase, and for these and other reasons, a quotation is only valid between clearly specified dates. This From Date is the beginning of that period.

### .3.6.11 Valid Thru Date (popup calendar)

Prices are only good for a certain period of time. Your suppliers might raise (or lower!) their prices, manufacturing expenses (energy, etc.) might increase, and for these and other reasons, a quotation is only valid between clearly specified dates. This Thru Date is the ending of that period.

## .3.6.12 Quote Name

The Quote Name helps to quickly recognize what the Quote is for.

You might, for example, name it 'Johnson's June Request for 50 Gizmos.' That would distinguish it from most other Quotes by specifying the recipient (Johnson), the month it was requested (June), the quantity (50) and the product (Gizmos).

## .3.6.13 Description

Comments here can help to distinguish later from among many similar quotations. You can also bring in other details requested by the customer so that those preparing the Quotation can better understand what is expected. Likewise, if extra features are to be included above what was requested, have them here so that they can be discussed easily with the customer.

## .3.7 View Quote

### .3.7.1 ViewQuote


View the selected Quote in this business format. Use the link at the bottom to [Copy] selected parts.

## .3.7.2 link buttons

[CommonReport] [SendReportByMail] [Create New Quote] [Create Order] [Copy] [View Quote] [Quote] [Quote Roles] [Quote Items] [Quote Attributes] [Quote Coefficients] [Quote Prices] [Adjustments] [Profit] [OrderOrderQuoteWorkEfforts]

## .3.7.3 Quote ... Information

The primary details of the quotation except for Items and Dates. Will vary according to the type and content of Quotes.

## .3.7.4 Quote Items

What is being quoted for, the Quantity, prices, etc.

## .3.7.5 Dates

Date of creation and dates of validity are given here.

## .3.7.6 Duplicate Quote

This only appears when editing an existing Quote. Copy appropriate data from this screen into which of the following:

- Quote Items
- Adjustments
- Quote Roles
- Quote Attributes
- Quote Coefficients

Check the box if you want the information to crossover into any or all of the above.

## .3.8 Quote (edit)

### .3.8.1 EditQuote


Make changes to the basic quotation from this screen. You can see differences from earlier screens, above.

### .3.8.2 link buttons

[Submit] [View Quote] [Quote] [Quote Roles] [Quote Items] [Quote Attributes] [Quote Coefficients] [Quote Prices] [Adjustments] [Profit] [OrderOrderQuoteWorkEfforts]

### .3.8.3 Quote ID

This cannot be changed without creating a new quote. The Quote ID is the number which pulls all the details of the quotation together. It created when you clicked to [Submit] the new Quote.

## .3.8.4 Quote Type ID (drop-down box)

Other, Product, and Proposal are generic types; others could be programmed in.

## .3.8.5 Party ID (popup search tool)

Popup search engine provides help locating the ID number for the Party to whom the quotation was directed.

## .3.8.6 Quote Issue Date (popup calendar)

This is the date that the Quote is given to the party requesting it, not necessarily the date it was prepared.

## .3.8.7 Status

Status could be:

- Created
- Approved
- Ordered
- Rejected

## .3.8.8 Currency (drop-down box)

Choose the currency used as the basis of this quotation from the drop-down box: US Dollars, Lira, Dinars, Reals, etc.

## .3.8.9 Product Store (drop-down box)

When your business includes more than one entity, this is where you specify which is offering the Quotation.

## .3.8.10 Valid From Date (popup calendar)

Prices are only good for a certain period of time. Your suppliers might raise (or lower!) their prices, manufacturing expenses (energy, etc.) might increase, and for these and other reasons, a quotation is only valid between clearly specified dates. This From Date is the beginning of that period.

### .3.8.11 Valid Thru Date (popup calendar)

Prices are only good for a certain period of time. Your suppliers might raise (or lower!) their prices, manufacturing expenses (energy, etc.) might increase, and for these and other reasons, a quotation is only valid between clearly specified dates. This Thru Date is the ending of that period.

### .3.8.12 Quote Name

The Quote Name helps to quickly recognize what the Quote is for.

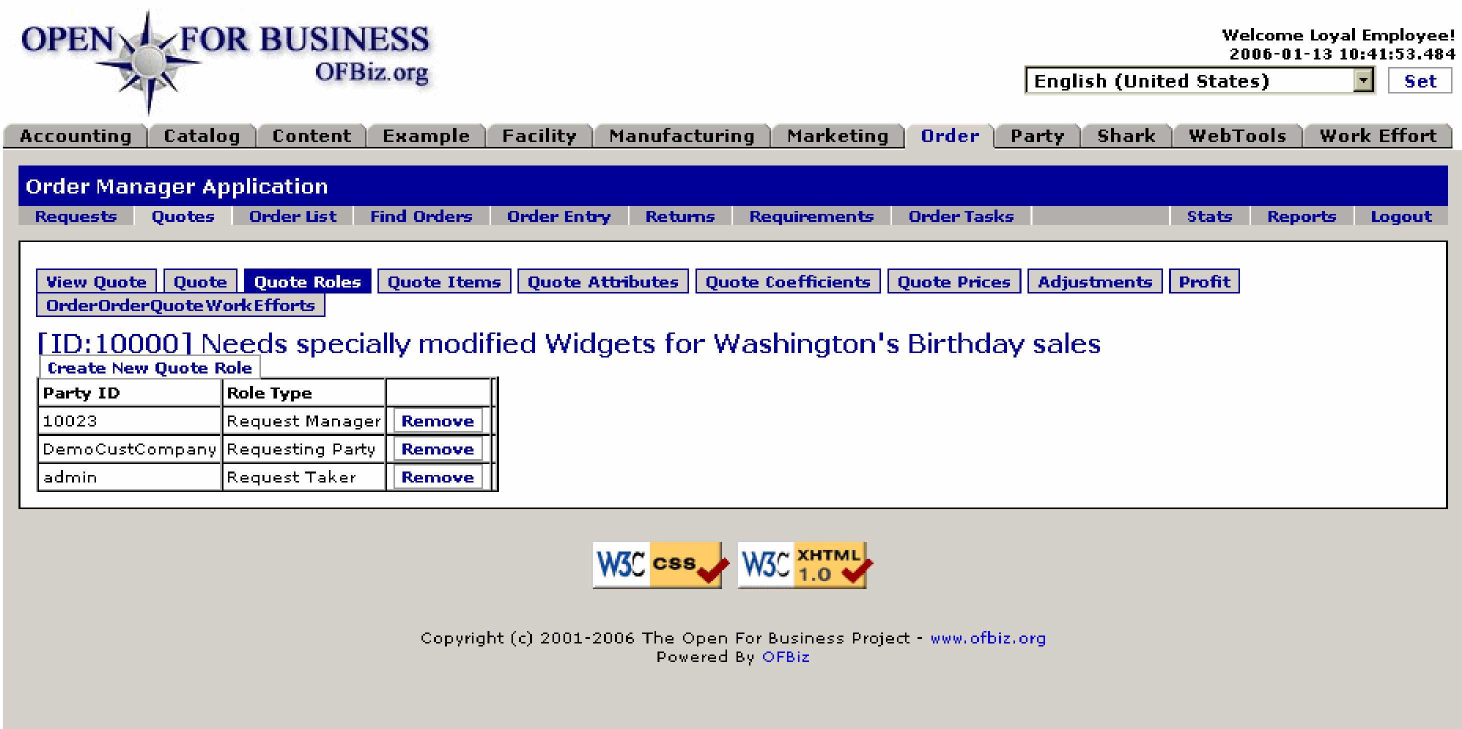
You might, for example, name it 'Johnson's June Request for 50 Gizmos.' That would distinguish it from most other Quotes by specifying the customer (Johnson), the month it was requested (June), the quantity (50) and the product (Gizmos).

### .3.8.13 Description

Comments here can help to distinguish later from among many similar quotations. You can also bring in other details requested by the customer so that those preparing the Quotation can better understand what is expected. Likewise, if extra features are to be included above what was requested, have them here so that they can be discussed easily with the customer.

# .3.9 Quote Roles

## .3.9.1 ListQuoteRoles




Roles are list in and/or removed from this table. [Create New Quote Role] brings up a tool for adding new Roles.

## .3.9.2 link buttons

[Create New Quote Role] [Remove] [View Quote] [Quote] [Quote Roles] [Quote Items] [Quote Attributes] [Quote Coefficients] [Quote Prices] [Adjustments] [Profit] [OrderOrderQuoteWorkEfforts]

## .3.9.3 Party ID

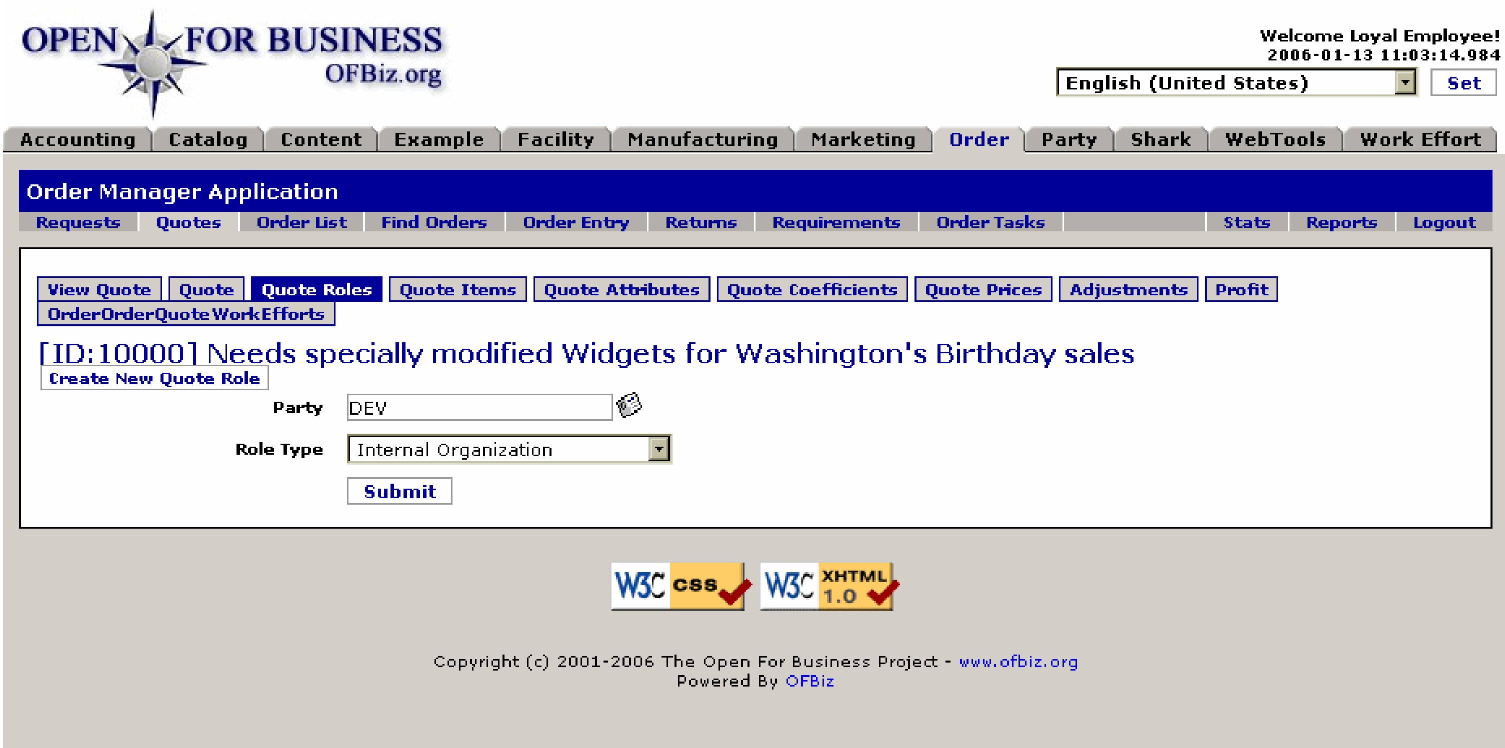
The Party ID as known in the system.

## .3.9.4 Role Type

What Role does the Party play in this Quotation effort or its fulfillment?

## .3.9.5 Create new role

### .3.9.5.1 createQuoteRole




Associate a Party and its Role in this quotation process from this screen; click the [Quote Roles] tab to return to the table above.

### .3.9.5.2 link buttons

[Create New Quote Role] [Submit] [View Quote] [Quote] [Quote Roles] [Quote Items] [Quote Attributes] [Quote Coefficients] [Quote Prices] [Adjustments] [Profit] [OrderOrderQuoteWorkEfforts]

### .3.9.5.3 Party (popup search tool)

Identify the Party using the popup Search Tool.

### .3.9.5.4 Role Type (drop-down box)

Select the appropriate Role from the drop-down box.

As always, the Role must be one applicable to the Party.

If the Role is not accepted by the system here, use the Party Manager > Role tool to authorize the Role you need.

## .3.10 Quote Items

### .3.10.1 ListQuoteItems


All quoted Items for the Quote are listed here by number; click the Quote Item Seq Id number to edit the Item.

### .3.10.2 link buttons

[Create New Quote Item] [Remove] [View Quote] [Quote] [Quote Roles] [Quote Items] [Quote Attributes] [Quote Coefficients] [Quote Prices] [Adjustments] [Profit] [OrderOrderQuoteWorkEfforts]

### .3.10.3 Quote Item Seq ID

Click the ID number to edit details.

### .3.10.4 Product ID

The ID name (or number) for the product being offered at the quoted price.

## .3.10.5 Quote WorkEffort ID

When an Event or Calendar item has been created under the Work Effort manager, this ID will link you to that item.

## .3.10.6 View Request

A click on this number takes you to a screen showing details of the Customer's request where you can see more about this Request Item as part of the original Request under the Request tab.

## .3.10.7 Quantity

The number of units upon which this quoted price is based.

## .3.10.8 Selected Amount

Standing price for your company to acquire or manufacture the item.

## .3.10.9 Quote Unit Price

The basic price per item at which you are prepared to offer the product although the actual delivery price will be affected by the Quote Coefficients and other aspects of the Quotation.

## .3.10.10 Estimated Delivery Date

Usually the customer requests that items be delivered by a particular time as part of his quotation. If that delivery time cannot be met, this estimated Delivery Date shows what you are able to do. It might be the same date as their request, it could even be earlier. Remember, though, it is better to under-promise and over-deliver!

## .3.10.11 Is Promo

Is this item part of an ongoing Promotional campaign?

## .3.10.12 Edit or View Quote Items

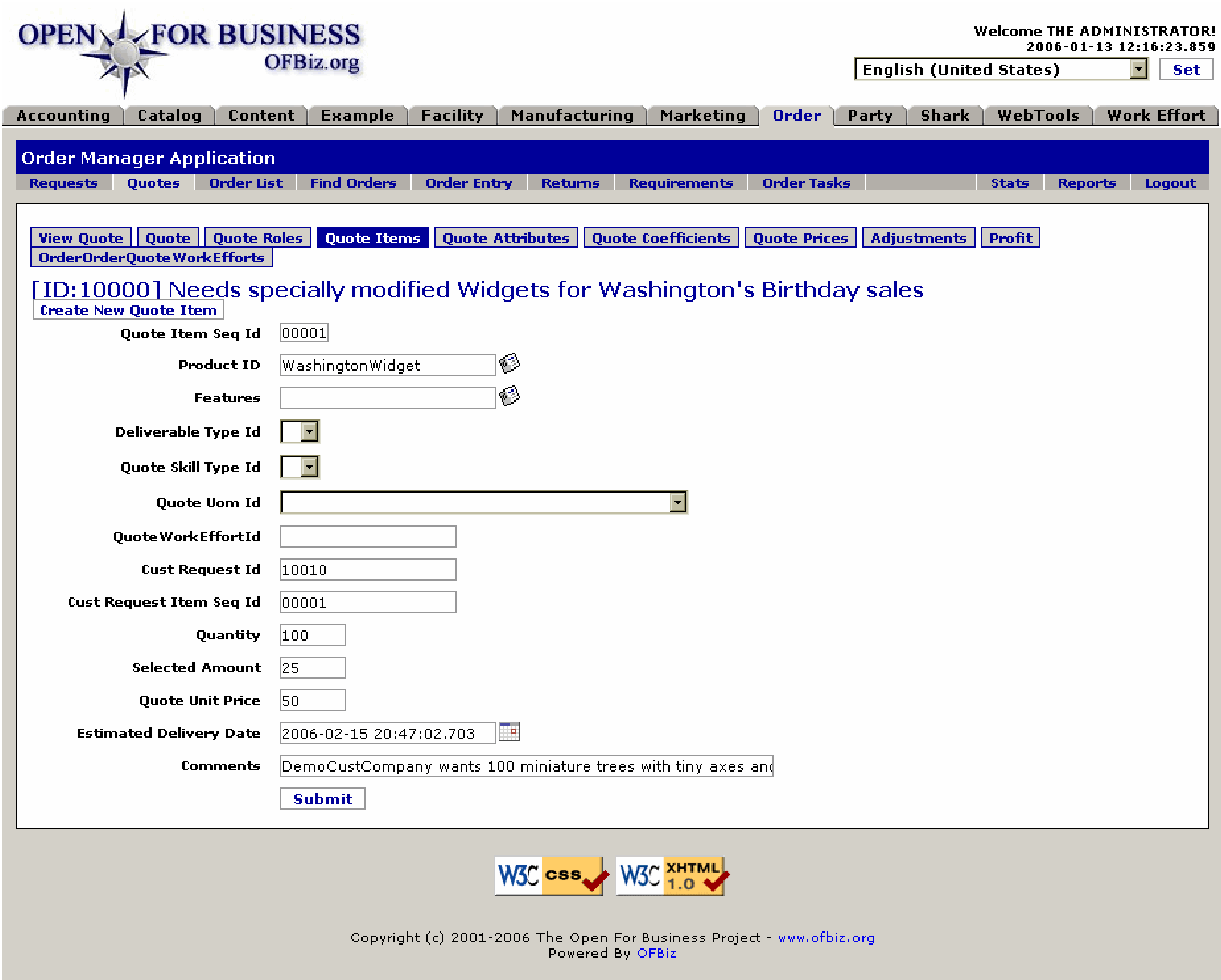
Two different presentations of the Order Items are available. The first one discussed here is the 'New or Edit Order Item' screen. The same screen is used to create a new item or to edit an existing one; data is populated for the existing items.

When you click the hypenated number in the View Request column of the table above, you are presented with a slightly different screen which is based upon the information entered under the Request tab. You can edit that information there and are also presented with a link to add another Request Item.

## .3.10.13 Edit Quote Items

Come to this screen by clicking on the Quote Item Seq ID number in the table above.

### .3.10.13.1 EditQuoteItem




| |
|---|
| Here you will edit or Create the details of the Quote Item. Some fields will be populated from the original Request data. |

### .3.10.13.2 link buttons

[Create New Quote Item] [Submit] [View Quote] [Quote] [Quote Roles] [Quote Items] [Quote Attributes] [Quote Coefficients] [Quote Prices] [Adjustments] [Profit] [OrderOrderQuoteWorkEfforts]

### .3.10.13.3 Quote Item Seq ID

When creating a new Quote Item, this number does not exist until the created Item has been Submitted. With each subsequent Item, the Sequence number is incremented up one digit. You can click on this number from the table of Quote Items to return to this screen for further edits.

### .3.10.13.4 Product ID (popup search tool)

Popup search engine to locate the correct Product ID number.

### .3.10.13.5 Features

Popup search engine helps you locate the specific feature related with the quoted product.

### .3.10.13.6 Deliverable Type ID (drop-down box)

When Deliverables are specified, the Type may be given here in the drop-down list.

### .3.10.13.7 Quote Skill Type ID (drop-down box)

Especially when quoting for a Services contract, Skill Types may be specified. Select one from those which will appear in this drop-down list.

### .3.10.13.8 Quote UOM ID (drop-down box)

Select the currency forming the basis of the quotation.

### .3.10.13.9 Quote Work Effort ID

This would identify the document detailing specific tasks, milestones, or other accomplishments that are not permanently related with a particular finished good or similar product. For example, applying OEM labels, modifications, etc.

### .3.10.13.10 Cust Request ID

This would typically be the customer's Request For Proposal or Request for Quotation number. Include this number in your response so the customer can quickly associate your quotation with his request.

### .3.10.13.11 Cust Request Item Seq ID

Within your customer's RFQ or RFP, there are probably several numbered items against which you are quoting.

Associate this particular Quote Item Seq ID with the requested Item Sequence number to assure accurate consideration of your quotation.

### .3.10.13.12 Quantity

This is the number of items (hours, units, pages) which will be multiplied by the Quote Unit Price and factored with the Quote Coefficient to determine the cost of your quotation. If this number is not the same as requested, be sure to explain the difference under Comments, below.

### .3.10.13.13 Selected Amount

How many of the Quoted quantity is actually being selected by the Customer.

### .3.10.13.14 Quote Unit Price

In the example illustrated, the unit price represents a volume discount from the book or list price asked for smaller orders for the product. The UOM ID should indicate the currency which forms the basis of this number.

### .3.10.13.15 Estimated Delivery Date (popup calendar)

Assumptions drive this delivery date; those assumptions should be detailed in the Comments. For example, the date might be predicated upon receiving the order confirmation by a specific date. Also, if you anticipate a price increase in three months, and you could not deliver the requested volume at this price at that time, give a time restriction.

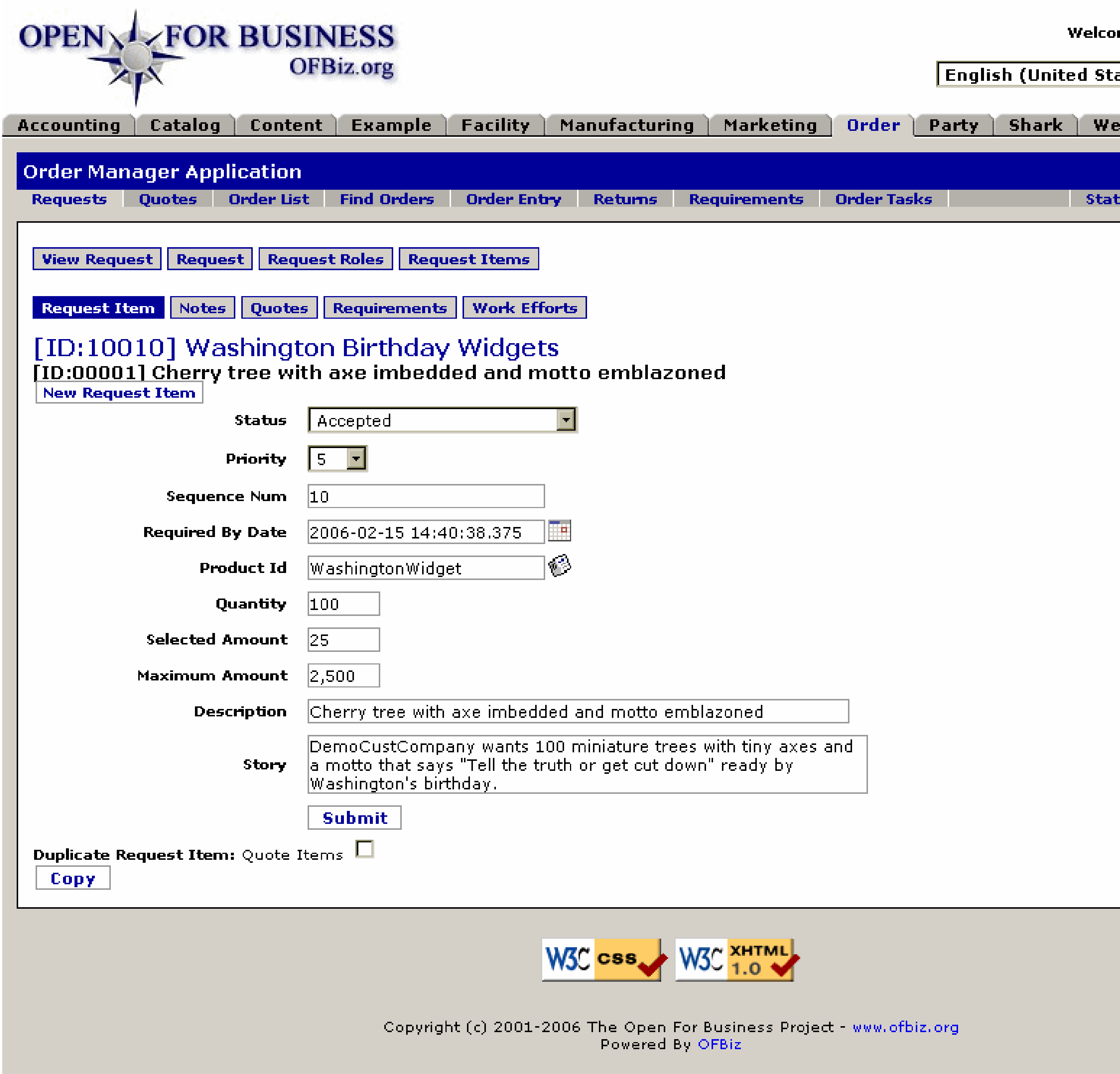
### .3.10.13.16 Comments

Any explanations needed for variances from the original Request should be included here. Include information needed by others in your company to fully and completely prepare the formal Quotation document.

## .3.10.14 Edit or View Request Item

Get to this screen by clicking on the hyphenated number under the View Request column in the table of Quote Items.

### .3.10.14.1 requestitem-view




When you click on the View Request link in the table, this working screen is presented; note that you are unde

## .3.10.14.2 link buttons

[New Request Item] [Submit] [Copy] [View Request] [Request] [Request Roles] [Request Items] [Request Item] [Notes] [Quotes] [Requirements] [WorkEfforts]

## .3.10.14.3 Discussion

For details of this screen, see the Requests tab, Edit Existing Requests, and select the Request Item sub-tab.

# .3.11 Quote Attributes

## .3.11.1 ListQuoteAttributes


Table of existing or special Quote Attributes which apply to this Quotation.

## .3.11.2 link buttons

[Create New Quote Attribute] [Remove] [View Quote] [Quote] [Quote Roles] [Quote Items] [Quote Attributes] [Quote Coefficients] [Quote Prices] [Adjustments] [Profit] [OrderOrderQuoteWorkEfforts]

### .3.11.3 Attribute Name

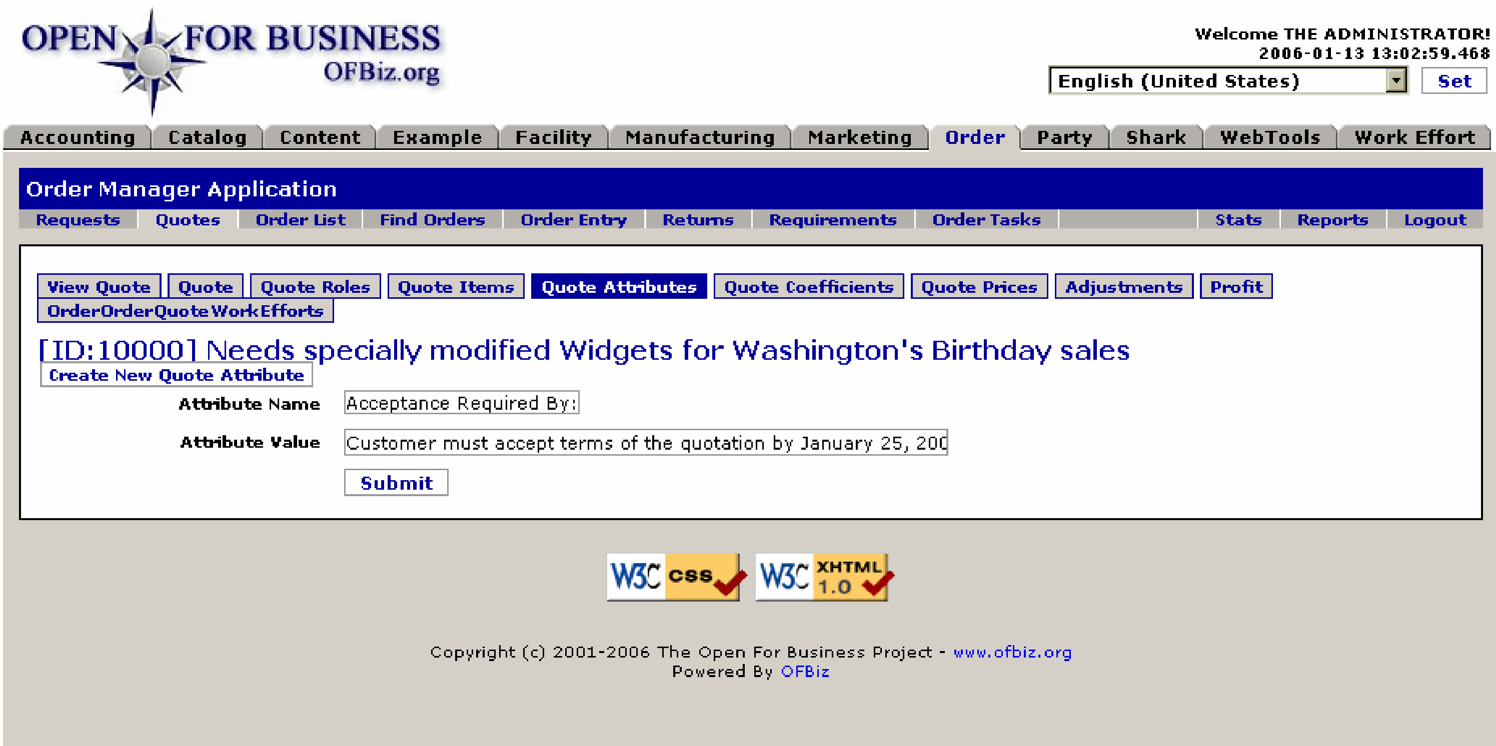
What the Attribute is called. Click on the Name to edit the Attribute.

### .3.11.4 Attribute Value

What the Attribute will do for the customer. This can be changed: just click on the Attribute Name to edit the Value or the name.

### .3.11.5 Create New Quote Attribute

#### .3.11.5.1 EditQuoteAttribute




New Attributes are created from this screen. You may also edit existing Attributes by clicking on the Attribute Name in the table.

#### .3.11.5.2 link buttons

[Create New Quote Attribute] [Submit] [View Quote] [Quote] [Quote Roles] [Quote Items] [Quote Attributes] [Quote Coefficients] [Quote Prices] [Adjustments] [Profit] [OrderOrderQuoteWorkEfforts]

### .3.11.5.3 Attribute Name

What the Attribute is called.

### .3.11.5.4 Attribute Value

How the Attribute affects the quotation or benefits the customer.

## .3.12 Quote Coefficients

### .3.12.1 ListQuoteCoefficients


Table of existing Quote Coefficients and their Value. To edit, you must remove and replace with a new Coefficient.

### .3.12.2 link buttons

[Create New Quote Coefficient] [Remove] [View Quote] [Quote] [Quote Roles] [Quote Items] [Quote Attributes] [Quote Coefficients] [Quote Prices] [Adjustments] [Profit] [OrderOrderQuoteWorkEfforts]

### .3.12.3 Coeff. Name

What the Coefficient is going to do.

### .3.12.4 Coeff. Value

The mathematical value by which this Coefficient will affect the amount of the Quotation.

### .3.12.5 Discussion of Order Quote Coefficients

Quote Coefficients and Quote Prices pages are designed to be used together.

On the Quote Coefficients page, a user can enter numeric coefficients, for example:

- HANDLING_COST_COEFF = 10 (i.e. 10%)

- PACKING_COST_COEFF = 5 (i.e. 5%)

These coefficients are used to modify the products' average costs and to provide a default price for each product in the quote.

You can see this in action in the Quote Prices page. In the top part of the screen you can see the list of coefficients and their value:

- HANDLING_COST_COEFF: 10

- PACKING_COST_COEFF: 5

The total sum of the coefficients:

- totCostMult: 15

The multiplier that will be applied to the products' average costs:

costToPriceMult: 1.176

This number is obtained by the following formula:

1 / (1 - totCostMult / 100)

In the Quote Prices screen are shown for each product:

- the average cost (from ProductPrice)

- the default unit price (for this quote) (this is the result of average_cost * costToPriceMult)

- the quote unit price (this is the content of the QuoteItem.quoteUnitPrice field)

If you check the items in the items in the list and submit the form, the default unit prices are stored in the QuoteItem.quoteUnitPrice fields. If you enter a value in the Manual Unit Price field, that value is stored instead of the default one.

NOTE: For this to work at all, you must have first established a price identified as the 'Average Price' for the Product under the Catalog Manager, Main Screen, Prices tab (EditProductPrices).

## .3.12.6 Edit Quote Coefficients

### .3.12.6.1 createQuoteCoefficient


Create a new Quote Coefficient at this screen. Coefficients are Quotation-specific, not universal.

### .3.12.6.2 link buttons

[Create New Quote Coefficient] [Submit] [View Quote] [Quote] [Quote Roles] [Quote Items] [Quote Attributes] [Quote Coefficients] [Quote Prices] [Adjustments] [Profit] [OrderOrderQuoteWorkEfforts]

### .3.12.6.3 Coeff Name

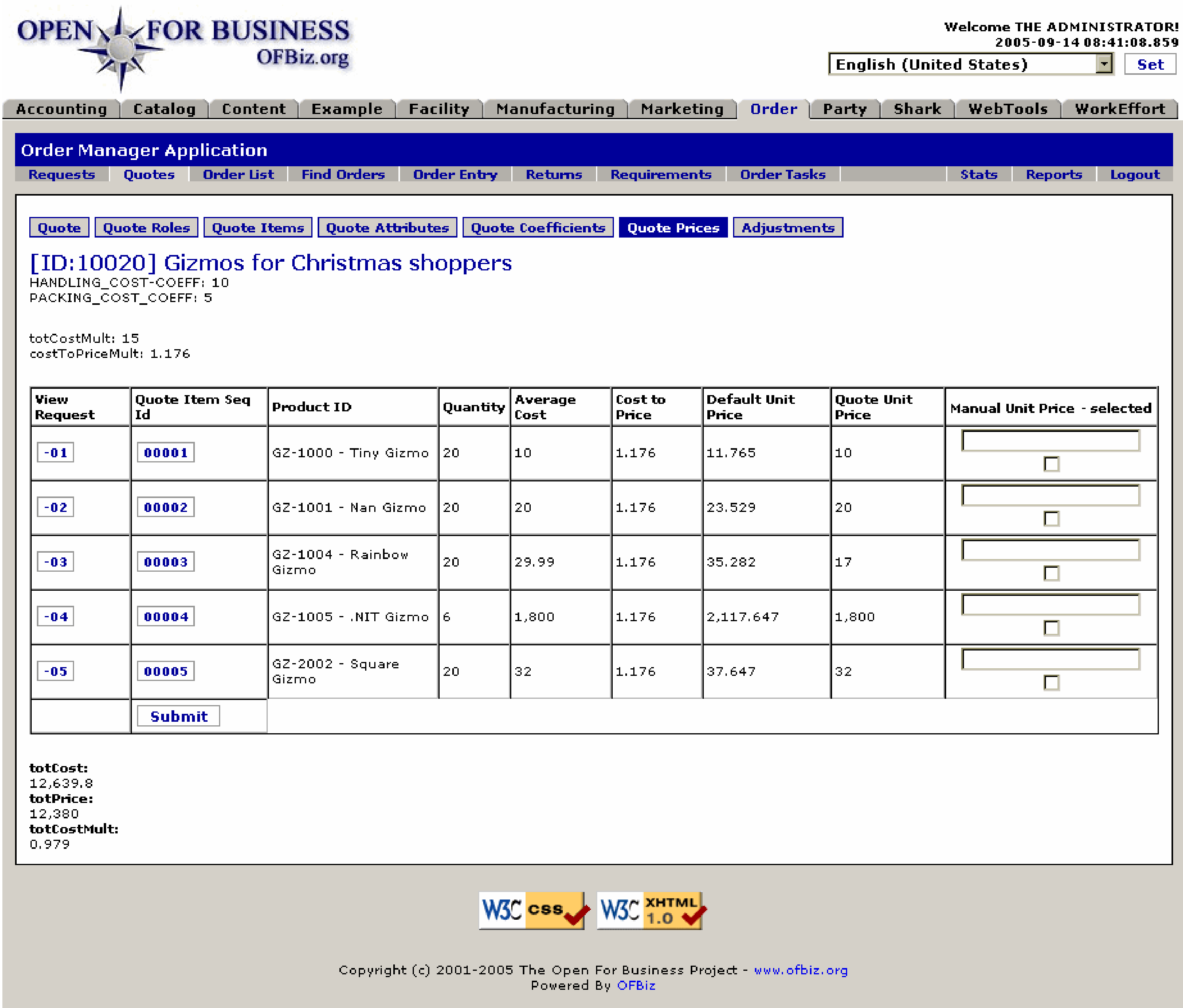
Give the Coefficient a unique name which clearly indicates the purpose for the Coefficient.

### .3.12.6.4 Coeff Value

Enter a whole value here in percentage. For example, an 11.5 per cent coefficient is entered as '11.5' and the process will use it as 0.115 in the calculations.

## .3.13 Quote Prices

### .3.13.1 ManageQuotePrices




| View Request | Quote Item Seq Id | Product ID | Quantity | Average Cost | Cost to Price | Default Unit Price | Quote Unit Price | Manual Unit Price - selected |
|---|---|---|---|---|---|---|---|---|
| -01 | 00001 | GZ-1000 - Tiny Gizmo | 20 | 10 | 1.176 | 11.765 | 10 | |
| -02 | 00002 | GZ-1001 - Nan Gizmo | 20 | 20 | 1.176 | 23.529 | 20 | |
| -03 | 00003 | GZ-1004 - Rainbow Gizmo | 20 | 29.99 | 1.176 | 35.282 | 17 | |
| -04 | 00004 | GZ-1005 - .NIT Gizmo | 6 | 1,800 | 1.176 | 2,117.647 | 1,800 | |
| -05 | 00005 | GZ-2002 - Square Gizmo | 20 | 32 | 1.176 | 37.647 | 32 | |
| | Submit | | | | | | | |



Table of quoted and computed prices with the Cost Multiplier calculated in.

### .3.13.2 link buttons

[Submit] [View Quote] [Quote] [Quote Roles] [Quote Items] [Quote Attributes] [Quote Coefficients] [Quote Prices] [Adjustments] [Profit] [OrderOrderQuoteWorkEfforts]

### .3.13.3 View Request

Click on this number and you are taken to the Requests tab where you can view the original RFQ details.

### .3.13.4 Quote Item Seq ID

Takes you to the EditQuoteItem editing screen for this item.

### .3.13.5 Product ID

Both the Product ID number and name are given here.

### .3.13.6 Quantity

The number of units being quoted.

### .3.13.7 Average Cost

If the Average Cost is maintained with the Product in your Catalog or Facility databases, it will be presented here.

The Default Unit Price is calculated from the Average Cost, not the Quote Unit Price. See Item 3 in the example to observe the effect this has when there is a substantial difference between the Quote Unit Price and your established Average Cost.

### .3.13.8 Cost To Price

The multiplier that will be applied to the products' average costs:

costToPriceMult: 1.176

This number is obtained by the following formula:

1 / (1 - totCostMult / 100)

See above: Discussion of Order Quote Coefficients. Numbers given here are based upon the example in the screen shots in this section. Your numbers will vary, although the formula will remain the same.

## .3.13.9 Default Unit Price

This is the Average Cost times the Cost to Price Multiplier.

## .3.13.10 Quote Unit Price

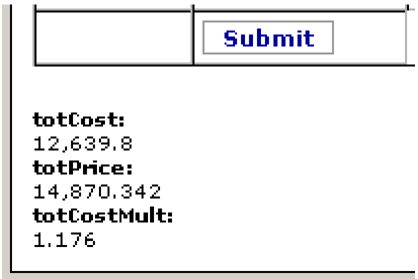
This is the Price quoted under the Quote Items tab.

## .3.13.11 Manual Unit Price - selected

If the unit price was not posted under the Quote Items section, it can be established here in this column.

Click the check box in this column before pressing the [Submit] button if you want the row submitted.

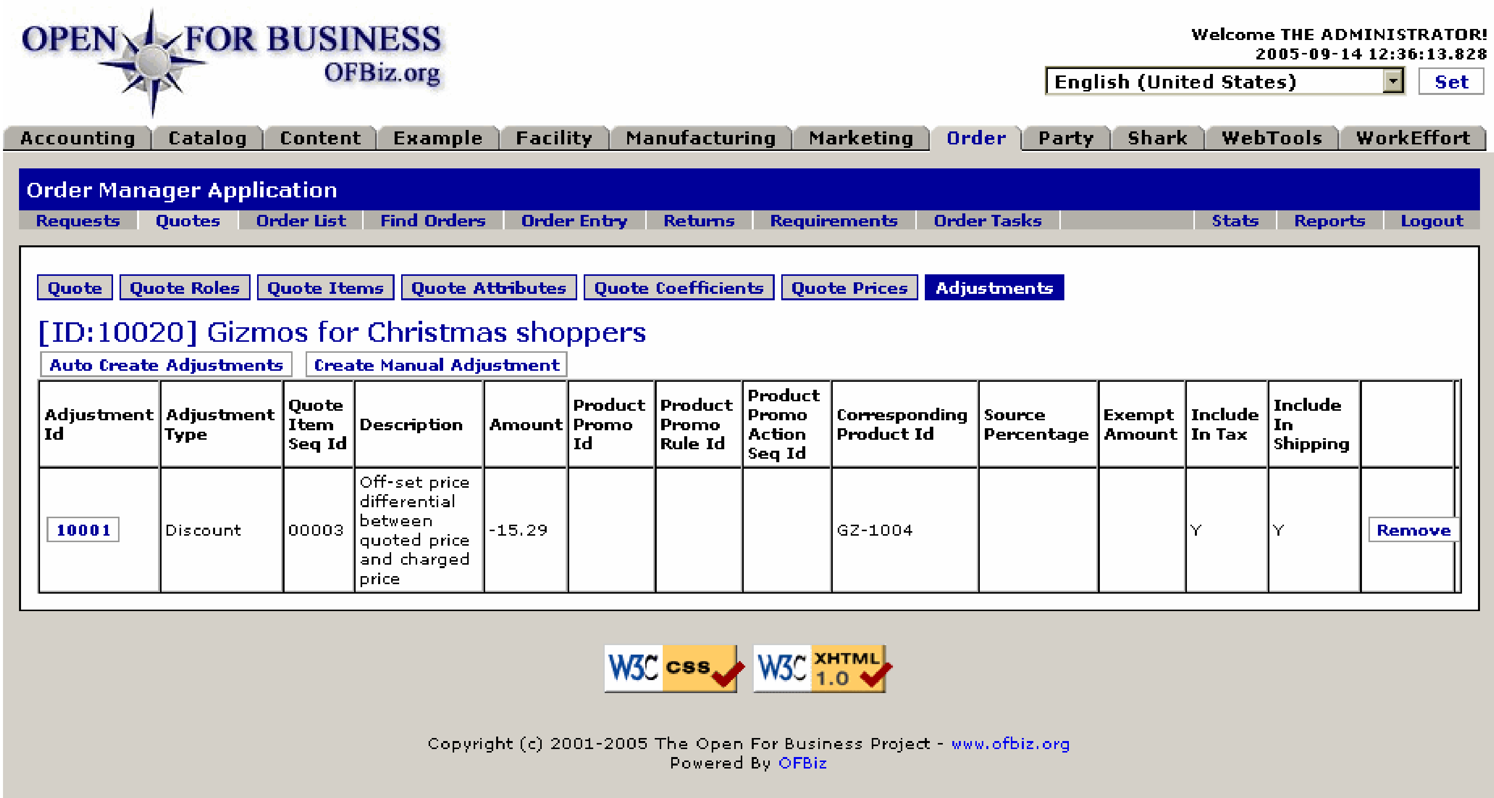
## .3.13.12 submitAction




After selecting the Rows and clicking the [Submit] link, the numbers here might be different.

# .3.14 Adjustments

## .3.14.1 ListQuoteAdjustments




Once an Adjustment has been created, it is displayed in this table of adjustments. Click the ID to edit.

## .3.14.2 link buttons

[Auto Create Adjustments] [Create Manual Adjustment] [Remove] [View Quote] [Quote] [Quote Roles] [Quote Items] [Quote Attributes] [Quote Coefficients] [Quote Prices] [Adjustments] [Profit] [OrderOrderQuoteWorkEfforts]

## .3.14.3 Discussion

The content of the columns in the table are discussed by the same title in the following section, Create Manual Adjustment.

## .3.14.4 Create Manual Adjustment

### .3.14.4.1 EditQuoteAdjustment


Edit or Create a new manual Adjustment to your Quote from this screen.

### .3.14.4.2 link buttons

[Create Manual Adjustment] [Submit] [View Quote] [Quote] [Quote Roles] [Quote Items] [Quote Attributes] [Quote Coefficients] [Quote Prices] [Adjustments] [Profit] [OrderOrderQuoteWorkEfforts]

### .3.14.4.3 Quote Adjustment ID

After the Quote Adjustment has been created, it is assigned an ID number for tracking and associating with the Quotation. This number cannot be changed.

## .3.14.4.4 Order Quote Adjustment Type ID (drop-down box)

Select from the drop-down box one of the following types:

- Promotion
- Replacement
- Discount
- Fee
- Miscellaneous Charges
- Sales Tax
- Shipping and Handling
- Surcharge
- Additional Feature
- Warranty

## .3.14.4.5 Quote Item Seq ID

Which item in the Quotation is affected by this Adjustment? As the Adjustments are based upon this Quote Item Seq Id, if every Item is to be adjusted, you will need to create an adjustment for each item.

## .3.14.4.6 Description

What are you doing with this Adjustment? Answer as completely yet concisely as possible.

## .3.14.4.7 Amount

Whether a percentage or a flat sum of adjustment, put the working number in here.

## .3.14.4.8 Items in table from Automatic Adjustment

### .3.14.4.8.1 Product Promo ID

If you wish to invoke a Promotion as part of this Adjustment, enter the Promo ID here.

### .3.14.4.8.2 Product Promo Rule ID

If the Product Promo is expressed as a Rule, enter the ID here.

#### .3.14.4.8.3 Product Promo Action Seq ID

If invoking a particular Action Sequence from the specified Promo or Promo Rule, enter that here.

### .3.14.4.9 Corresponding Product ID

Specify the Product ID here. While the Seq ID of the Quote might be memorable, it is often easier to recognize the Product whose price you are quoting.

### .3.14.4.10 Source Percentage

Enter this as a number but keep the decimal point to the right. For example, 33-1/3 percent would be entered as 33.33, NOT 0.3333.

### .3.14.4.11 Exempt Amount

Whatever portion of the Quote Price that is not being affected by this Adjustment is entered here.

### .3.14.4.12 Include in Tax (Y/N)

Will the amount of the Adjustment be included in the Tax determination?

### .3.14.4.13 Include in Shipping

Particularly if Shipping costs are a percentage of the sales amount, will the Adjustments be included when calculating the costs for Shipping?

## .3.15 Profit

### .3.15.1 ViewQuoteProfit

### .3.15.2 link buttons

[View Quote] [Quote] [Quote Roles] [Quote Items] [Quote Attributes] [Quote Coefficients] [Quote Prices] [Adjustments] [Profit] [OrderOrderQuoteWorkEfforts]

## .3.16 OrderOrderQuoteWorkEfforts

### .3.16.1 ListQuoteWorkEfforts

### .3.16.2 link buttons

[Create New Quote] [Delete]

# .4 Order List

When opening up the Order Manager, the Main Screen you see (this default screen) is actually the Order List screen. If you are seeking open orders, currently being processed at one of the earlier levels of Status, the returned List will probably be manageable. Over time, when you have completed hundreds of orders, you might need to use the Find Orders tab to locate your order using its more refined search tool.

## .4.1 main


This is the default screen for the Order Manager. Find orders quickly by Status and/or Type.

## .4.2 link buttons

[Submit]

## .4.3 Status

Check a box for 'All' the orders or a box matching the Status of the orders you seek. Default selection (shown when the Order List tab is clicked) is All. Select from one of the following:

- All
- Created
- Processing
- Approved
- Completed
- Sent
- Rejected
- Cancelled

## .4.4 Type

Check a box matching the Type of Order you are seeking. Default type is Sales Order. Choose one from the following:

- Sales
- Purchase

## .4.5 OrderList table

Click on the number in the Order # column to view and/or edit an existing order. Information is given about each order in the following columns:

- Date
- Order #
- Order Type
- Bill From Party
- Bill To Party
- Amount
- Tracking Code
- Status

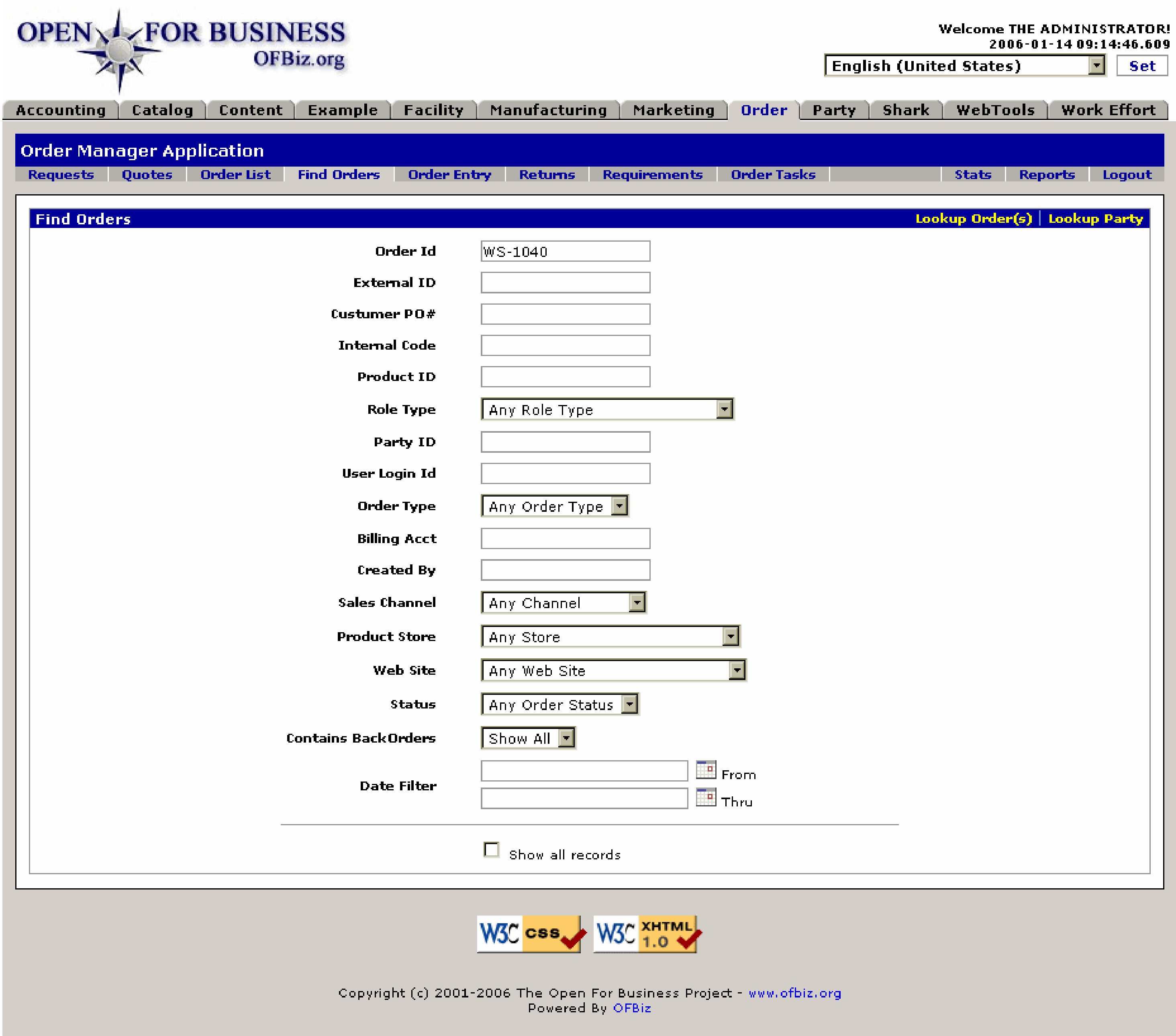
## .5 Find Orders

As you enter the information you have about an order, remember that each additional parameter you introduce will probably reduce the number of returns. If any item entered is erroneous, you might not locate the Order you seek.

Therefore, unless you have the actual Order ID or customer Purchase Order number, try entering only one parameter at first, see if the return is too large, enter another parameter, and so forth.

You may also search for only those orders entered by a specific employee (User Login ID or Created By) for a specific date, or search for all the orders for a particular Product ID by a certain customer, etc.

## .5.1 findorders




Remember that each additional parameter entered will reduce the number of returns and also increase chance of entering errors.

## .5.2 link buttons

[Show All Records] [Lookup Order(s)] [Lookup Party]

## .5.3 Lookup Orders

### .5.3.1 Order ID

#### .5.3.1.1 If specific, ...

If you have the specific Order ID, this will return the exact order you specify.

#### .5.3.1.2 Partial Order ID numbers

Partial Order ID numbers will NOT return a list of possible orders. For example, if the order number starts with 1000_, but you cannot recall the last digit, it is not possible to retrieve a group of the orders matching that partial ID.

### .5.3.2 External ID

If an ID from an outside company is used, it would be found here.

### .5.3.3 Customer PO#

#### .5.3.3.1 Assigned Purchase Order number

This is the PO associated with the order at the time it was placed.

#### .5.3.3.2 Multiple orders on same PO

If more than one order is created from the same PO #, a list of all the orders under that PO # is returned. This is possible when working with many companies that have similar numbering schemes, or one blanket PO with multiple order actions.

### .5.3.4 Internal Code

If some other Code number from an internal source applies, that would be here.

### .5.3.5 Product ID

Accuracy is CRITICAL: the Product ID must be entered exactly to get a valid return.<p/> Results: All orders involving the purchase or sales of the entered ProductID will be returned.

### .5.3.6 Role Type (drop-down box)

This is often used along with the Party ID field. If an order was placed for a Party that has placed orders under more than one Role, this selection will limit returns to the Party's order(s) in the selected Role only.

### .5.3.7 Party ID

Will bring up orders associated with the selected Party. The Role Type field is often used along with this; see description above.

### .5.3.8 UserLogin ID

The UserLogin ID is what a User uses to login to the system, and is associated with a single party. A Party may have more than one UserLogin ID.

### .5.3.9 Order Type (drop-down box)

This could be a Purchase Order, a Sales Order, a Work Order, or other order type.

### .5.3.10 Billing Acct

Use this field to find orders placed against the specified Billing Account. This is often used for orders that are invoiced on fulfillment and payment is received later.

### .5.3.11 Created By

Use this field to find orders created by the Party with the specified UserLogin ID. For example, if you wanted to find all the orders that you, as an order taker, processed yesterday, this is where you would enter your UserLoginID.

### .5.3.12 Sales Channel (drop-down box)

Which path did the order take coming into your facility? Use the drop-down box to select from among the following:

- Any Channel
- Web Channel
- POS Channel
- Fax Channel
- Phone Channel
- E-Mail
- Channel

- Snail Mail Channel [postal service]
- Affiliate Channel
- Unknown Channel

## .5.3.13 Product Store (drop-down box)

Limits the search for orders to those placed through a specific store.

## .5.3.14 Web Site (drop-down box)

For web-based orders, limits the search for orders to those placed through a specific web site.

## .5.3.15 Status (drop-down box)

Select from one of the following:

- Any Order Status
- Created
- Sent
- Processing
- Approved
- Completed
- Rejected
- Canceled

This constraint could be useful when seeking, for example, only the orders for a customer which have been Approved but are not yet Completed. A combination of the Party ID and the Created Status should return a list of those orders.

## .5.3.16 Contains Back Orders (drop-down box)

If 'Show All' is selected, all orders with or without Back Orders are displayed. If 'Only' is selected, then only orders having back orders are displayed.

## .5.3.17 Date Filter (from/thru calendar popup)

Limits order to the specified date range. Used to exclude orders outside the timeframe specified.

### .5.3.17.1 From date

From date means that no orders placed before that date will be returned.

### .5.3.17.2 Thru date

Thru date means that orders placed after that date will not be returned.

### .5.3.18 Show All Records (checkbox)

When no other parameters are entered, clicking on this box acts like a link button, returning all existing records.

When this box is checked along with a few parameters, all records meeting those parameters are returned. For example, choosing 'Approved' under Status with this checkbox marked will return all of the approved orders.

HINT. If you know that an order exists but your search efforts have not been fruitful, you might try clearing all parameters and then clicking on the checkbox 'Show All Records.' This powerful command will return a display of all existing records through which you can scan visually. When there are many records, though, both the operation and the scan might take a lot of time.

## .5.4 Orders Found

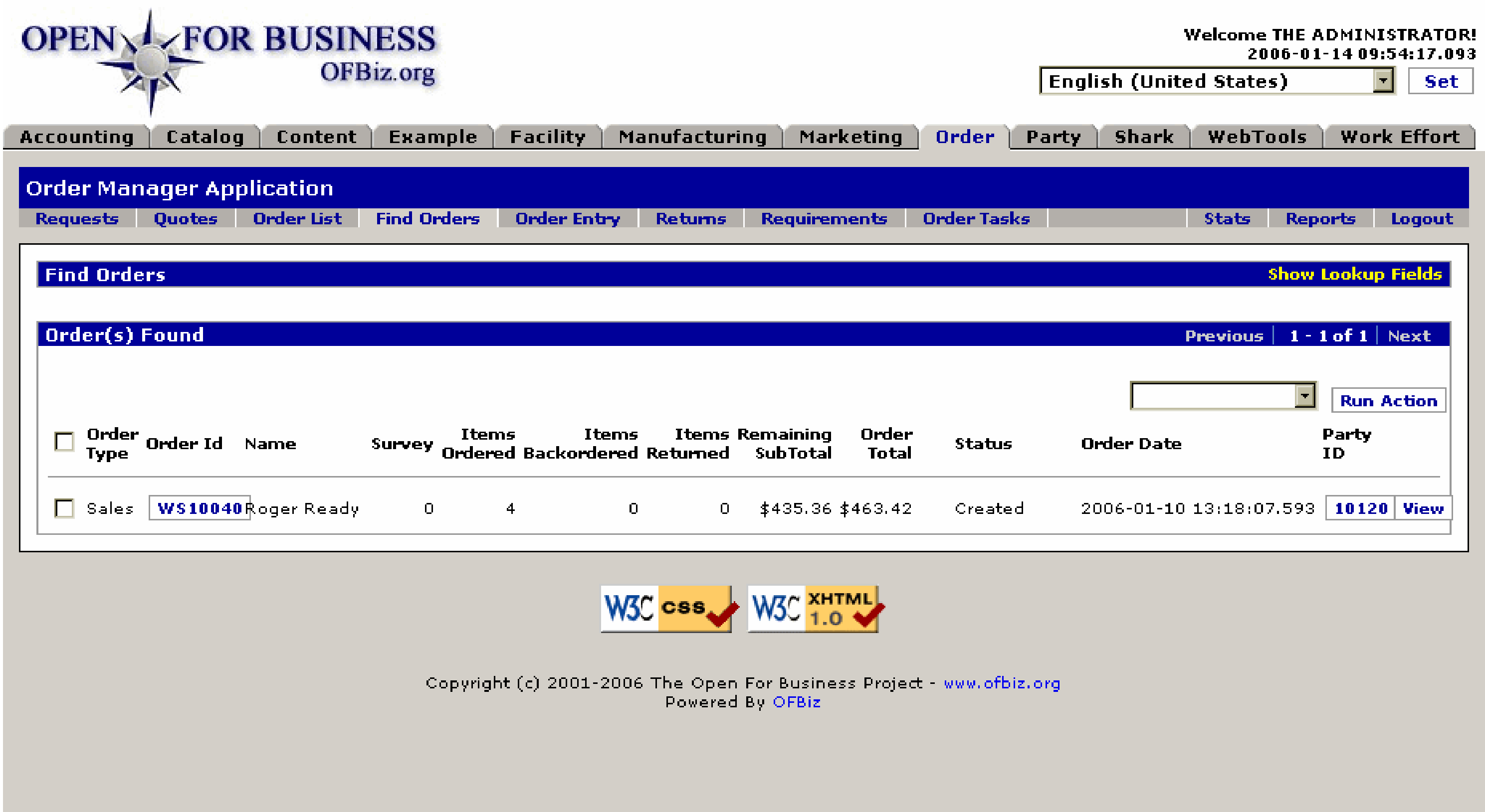
When the exact Order ID is entered, the View Order screen (below) is returned with that order.

If a search returns more than one order or if the box [Show all orders] is checked with no search parameters given, the following table of existing or matching orders is returned.

When you spot your sought-for order, click on the Order ID number to go to that order.

If too many orders are returned (multiple pages), click on [Show Lookup Fields] and enter a few parameters to reduce the search results.

## .5.4.1 findorders-found




Click on the Order ID or [View] to work with the order. Choose "Pick Orders" or "Approve Orders" and click to [Run Action].

## .5.4.2 link buttons

[View] [Previous] [Next] [Run Action] [Show / Hide Lookup Fields] [Lookup Order(s)]

## .5.4.3 Run Action (drop-down box)

When an Order has the box checked beside it, you can invoke one of the following actions for the selected Order(s).

This saves you the step of opening the order and then invoking the action.

Select from the drop-down box and click [Run Action].

- Approve Orders
- Pick Orders

### .5.4.4 Select order check boxes

When there is a box checked to the left of the Order, the [Run Action] command will apply to that order. If the top box (not beside any specific order) is checked, all boxes will be selected.

This allows you to find all orders that have, for example, been created but not Approved. By selecting each of those boxes and doing the Run Action 'Approve Orders', that process will be run in a batch. This will save the tedium of pulling each order individually for that purpose. Similarly, all Approved orders could be found, selected, and have the 'Pick Orders' Action run for them all.

### .5.4.5 Order Type

Generally Sales Order or Purchase Order.

### .5.4.6 Order ID

Links to View order.

### .5.4.7 Name

Name of the party placing the order. Click on the Party ID in another column to see details about the Party.

### .5.4.8 Survey

If the Party completed a Survey while placing the order, that information is reported here.

### .5.4.9 Items Ordered

How many items total were ordered or added to the order as part of a promotion.

### .5.4.10 Items Backordered

Those Items in the order which are not currently available to fulfill the order.

### .5.4.11 Items Returned

If the Order is mature enough to have already shipped at least some of the items and if any of those items have already been returned, the number of returned items is given here.

### .5.4.12 Remaining Subtotal

The value of the items remaining to shipped. Does not include shipping costs.

### .5.4.13 Order Total

The total cost including shipping that has been or will be charged to the ordering party.

### .5.4.14 Status

Order creation and fulfillment is a process. The Status indicates where this order currently exists along that path from Creation through Completed.

### .5.4.15 Order Date

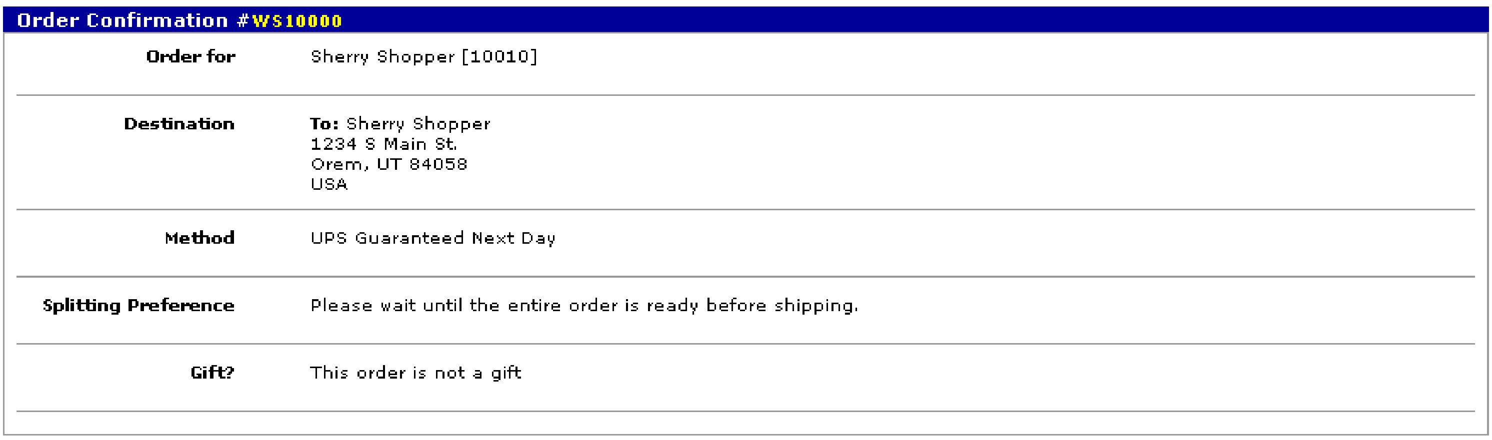
When the order was placed; includes time.

### .5.4.16 Party ID

Links to View Party.

## .5.5 Orders Created but Not Approved

### .5.5.1 Order Confirmation



**Order Confirmation #WS10000**

| | |
|---|---|
| **Order for** | Sherry Shopper [10010] |
| **Destination** | **To:** Sherry Shopper<br>1234 S Main St.<br>Orem, UT 84058<br>USA |
| **Method** | UPS Guaranteed Next Day |
| **Splitting Preference** | Please wait until the entire order is ready before shipping. |
| **Gift?** | This order is not a gift |

When an order has been Created but not yet Approved, an Order Confirmation # appears. Click on number to Approve.

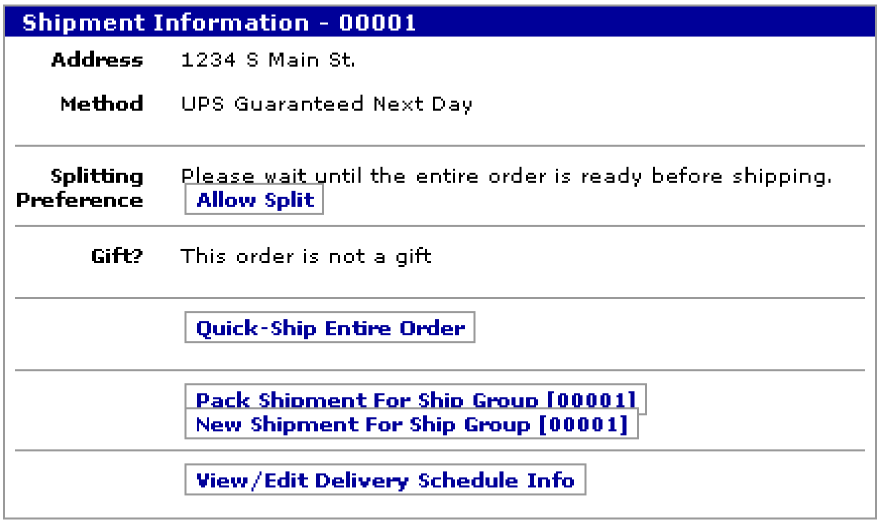
## .5.5.2 Discussion

If an order falls outside specific parameters (e.g., a higher than usual order size or a new account), then the account management team needs to ensure that it 'looks right.' If needed, contact is made with the customer to ensure that it is not fraudulent.

All orders need to be manually approved using the 'Order Confirmation' link on the top left hand corner of the Order Detail screen, usually appearing in yellow to the right of those words: Order Confirmation #.

# .5.6 Orders Approved but Not Shipped

## .5.6.1 Choose Shipping




Get the order started by choosing a shipping option here.

## .5.6.2 Discussion

The next step is your bridge from the Order Manager processes into working with the Facility Manager to ship the products to the purchaser. In the Approved Order (shown below) the products have been shipped; the same section shown above has options for Returns instead of for Shipping.

Initially the links you need to choose between are Quick-Ship Entire Order and Pack Shipment For Ship Group [00001].

Quick-Ship will take care of all the details behind the scenes the prepare and ship the item(s) out the door. Pack Shipment invokes each of the steps needed to (1) Create the shipping documents, (2) 'pick' the order in the Warehouse, (3) pack the items, (4) schedule the shipment with the carrier, and all the other little details which are pretty much automated using Quick-Ship.

Until the products have all been shipped you will also have a link in this section to either create a New Shipment For Ship Group [00001] and/or to View/Edit Delivery Schedule Info. You can see more details about all of these steps in the Facility Manager documentation.

## .5.7 View Order

### .5.7.1 orderview

## Order #WS10000 Information [ PDF ]

| | |
|---|---|
| **Status History** | Current Status: Completed<br>Completed - 2005-12-01 08:11:12.220<br>Approved - 2005-12-01 08:10:20.657<br>Created - 2005-12-01 08:09:56.595 |
| **Date Ordered** | 2005-12-01 08:09:56.595 |
| **Currency** | USD |
| **Sales Channel** | Unknown Channel |
| **Product Store** | 9000 |
| **Origin Facility** | N/A |
| **Created by** | admin |

## Payment Information

| | |
|---|---|
| **Credit Card** | Sherry Shopper<br>Visa 4111111111111111 09/2006 [Settled] |
| | Authorize: 2005-12-01 08:10:19.251 $248.22<br>(**Ref:** 1133449819189 **AVS:** N/A **Score:** N/A) [Details] |
| | Capture: 2005-12-01 08:11:28.017 $248.22<br>(**Ref:** 1133449887986 **AVS:** N/A **Score:** N/A) [Details] |
| | **To:** Sherry Shopper<br>1313 Ave. Z<br>Scottsbluff, NE 69361<br>USA |
| **Invoices** | # 10000 |

## Contact Information

| | |
|---|---|
| **Name** | Mrs. Sherry Shopper ( 10011 ) ( Other Orders ) |
| **Billing (AP) Address** | **To:** Sherry Shopper<br>1313 Ave. Z<br>Scottsbluff, NE 69361<br>USA<br>(lookup:whitepages.com) |
| **Order Notification Email Address** | sherry@yahoo.com<br>( Send a confirmation email ) |
| **Shipping Destination Address** | **To:** Sherry Shopper<br>1313 Ave. Z<br>Scottsbluff, NE 69361<br>USA<br>(lookup:whitepages.com) |

## Shipment Information - 00001

| | |
|---|---|
| **Address** | 1313 Ave. Z |
| **Method** | DHL Second Day |
| **Splitting Preference** | Please ship items I ordered as they become available (you may incur additional shipping charges). |
| **Gift??** | This order is a gift |
| **Gift Message** | Merry Christmas |
| **Shipments** | # 10000 Packing Slip |
| | Quick-Refund Entire Order<br>Create Return |

## Order Items

| Product | Status | Quantity | Unit / List | Adjustments | Sub.Total |
|---|---|---|---|---|---|
| GZ-5005 - Purple Gizmo<br>Catalog Ecommerce | Current: Completed<br>2005-12-01 08:11:09.454 : Completed<br>2005-12-01 08:10:21.923 : Approved<br>2005-12-01 08:09:56.595 : Created | Ordered: 2<br>Cancelled: 0<br>Remaining: 2 | $47.99 / $48.00 | ($47.99) | $47.99 |
| ***Adjustment*: Promotion**: Test $ off products in categories | | | | ($47.99) | |
| ***Adjustment*: Sales Tax**: (1% OFB _NA_ Tax) **Jurisdiction:** Not Applicable [_NA_] **Rate:** 1 | | | | $0.48 | |
| ***Ship Group*:** [00001] 1313 Ave. Z | | 2 | | | |
| ***Issued to Shipment Item*:** 10000 :00001 | | 2 | | | |
| WG-1111 - Micro Chrome Widget<br>Catalog Ecommerce | Current: Completed<br>2005-12-01 08:11:11.392 : Completed<br>2005-12-01 08:10:21.923 : Approved<br>2005-12-01 08:09:56.595 : Created | Ordered: 2<br>Cancelled: 0<br>Remaining: 2 | $59.99 / $60.00 | $0.00 | $119.98 |
| ***Adjustment*: Sales Tax**: (1% OFB _NA_ Tax) **Jurisdiction:** Not Applicable [_NA_] **Rate:** 1 | | | | $1.20 | |
| ***Ship Group*:** [00001] 1313 Ave. Z | | 2 | | | |
| ***Issued to Shipment Item*:** 10000 :00002 | | 2 | | | |
| GZ-9290 - His/Her Gizmo<br>Catalog Ecommerce | Current: Completed<br>2005-12-01 08:11:11.876 : Completed<br>2005-12-01 08:10:21.923 : Approved<br>2005-12-01 08:09:56.595 : Created | Ordered: 1<br>Cancelled: 0<br>Remaining: 1 | $97.99 / $99.99 | $0.00 | $97.99 |
| ***Adjustment*: Sales Tax**: (1% OFB _NA_ Tax) **Jurisdiction:** Not Applicable [_NA_] **Rate:** 1 | | | | $0.98 | |
| ***Ship Group*:** [00001] 1313 Ave. Z | | 1 | | | |
| ***Issued to Shipment Item*:** 10000 :00003 | | 1 | | | |
| GZ-1006-1 - Open Gizmo (LGPL)<br>Catalog Ecommerce | Current: Completed<br>2005-12-01 08:11:11.97 : Completed<br>2005-12-01 08:10:21.939 : Approved<br>2005-12-01 08:09:56.595 : Created | Ordered: 1<br>Cancelled: 0<br>Remaining: 1 | $1.99 / $5.99 | ($1.99) | $0.00 |
| ***Adjustment*: Promotion**: Test Gift with Amount of Specific Product | | | | ($1.99) | |
| ***Ship Group*:** [00001] 1313 Ave. Z | | 1 | | | |
| ***Issued to Shipment Item*:** 10000 :00004 | | 1 | | | |
| WG-1111 - Micro Chrome Widget<br>Catalog Ecommerce | Current: Completed<br>2005-12-01 08:11:12.142 : Completed<br>2005-12-01 08:10:21.939 : Approved<br>2005-12-01 08:09:56.595 : Created | Ordered: 1<br>Cancelled: 0<br>Remaining: 1 | $59.99 / $60.00 | ($59.99) | $0.00 |
| ***Adjustment*: Promotion**: Test Promo 1 | | | | ($59.99) | |
| ***Ship Group*:** [00001] 1313 Ave. Z | | 1 | | | |
| ***Issued to Shipment Item*:** 10000 :00002 | | 1 | | | |

| | |
|---|---|
| **Promotion :** | ($26.60) |
| **Shipping and Handling :** | $6.20 |

### .5.7.2 Discussion

The details of the actual order screen are discussed more fully in a later section, Order Entry - Sales Order; see that section below.

# .6 Order Entry - Sales Order

## .6.1 Sales Order process

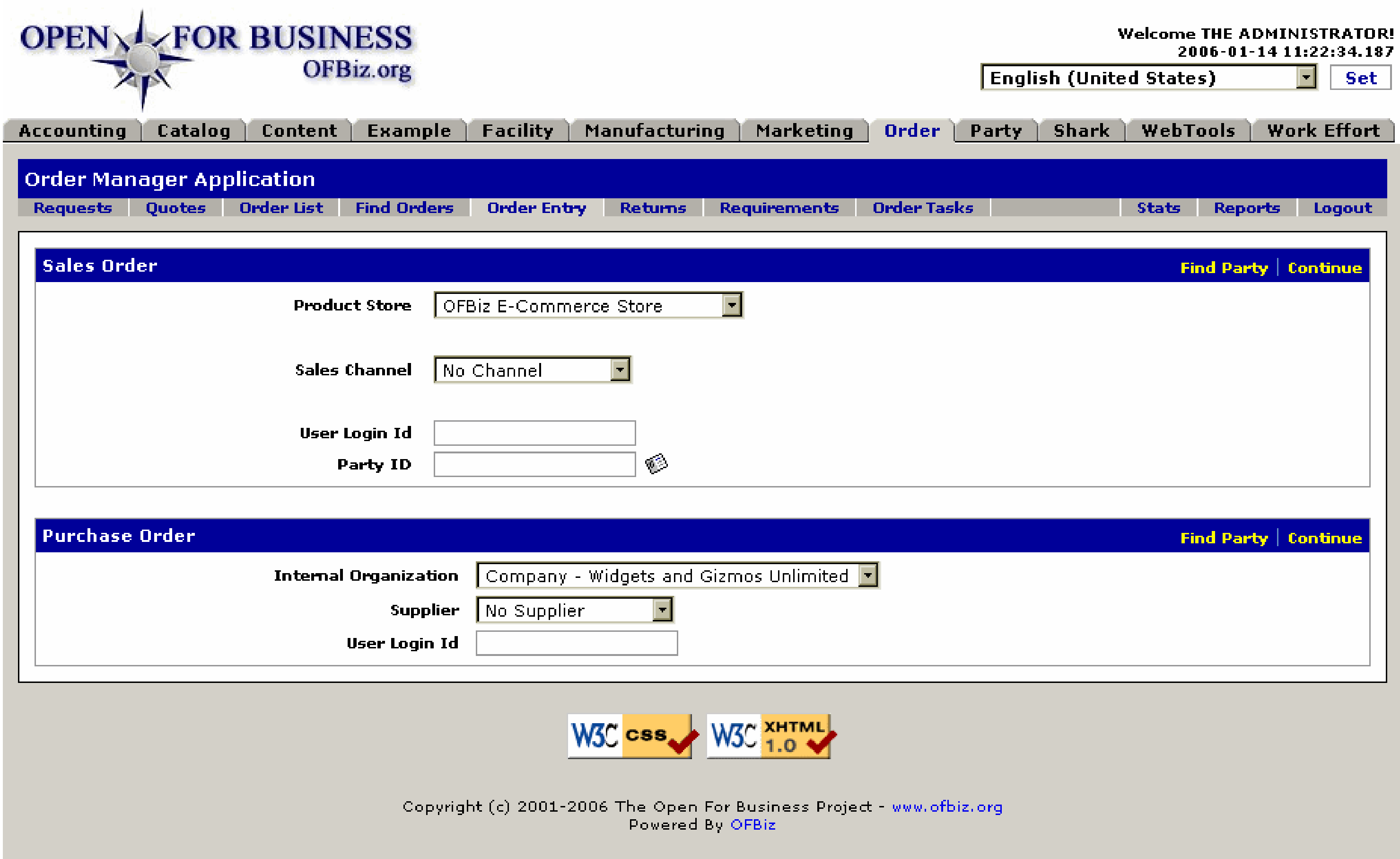
### .6.1.1 Discussion

The very first step with any order is to identify your customer. If they do not have an ID within your system, go immediately to the Order Manager and create one! If they do have one, you will need that to proceed with the Order Process.

Begin the Order Entry process by completing the top (Sales Order) section of this form. See the following major section Order Entry - Purchase Order for discussion of the bottom portion which is used when purchasing from a supplier for your company.

Complete the Product Store and Sales Channel using the drop-down boxes, and identify the customer at this screen; [Continue] then takes you to the Sales Order Entry process, next.

## .6.1.2 orderentry




Both the Sales and Purchase Order processes begin with this screen. For your Sales Order, complete the top part, click [Continue].

## .6.1.3 link buttons

[Find Party] [Continue]

## .6.1.4 Product Store (drop-down box) *

Choose the Store through which this order will be processed from the drop-down list. Required entry.

## .6.1.5 Sales Channel (drop-down box)

What is the method this order arrived or is arriving at your facility? The choices from the drop-down box might include:

- No Channel
- POS Channel

- Web Channel
- FAX Channel
- Phone Channel
- E-Mail Channel
- Snail Mail Channel
- Affiliate Channel
- Unknown Channel

### .6.1.6 UserLogin ID

Either enter the User Login ID here, or the PartyID below, then click on [Continue].

### .6.1.7 Party ID (popup search tool)

Either enter the PartyID here, or the User Login ID above, then click on [Continue]. You can use the popup search tool to help identify the PartyID.

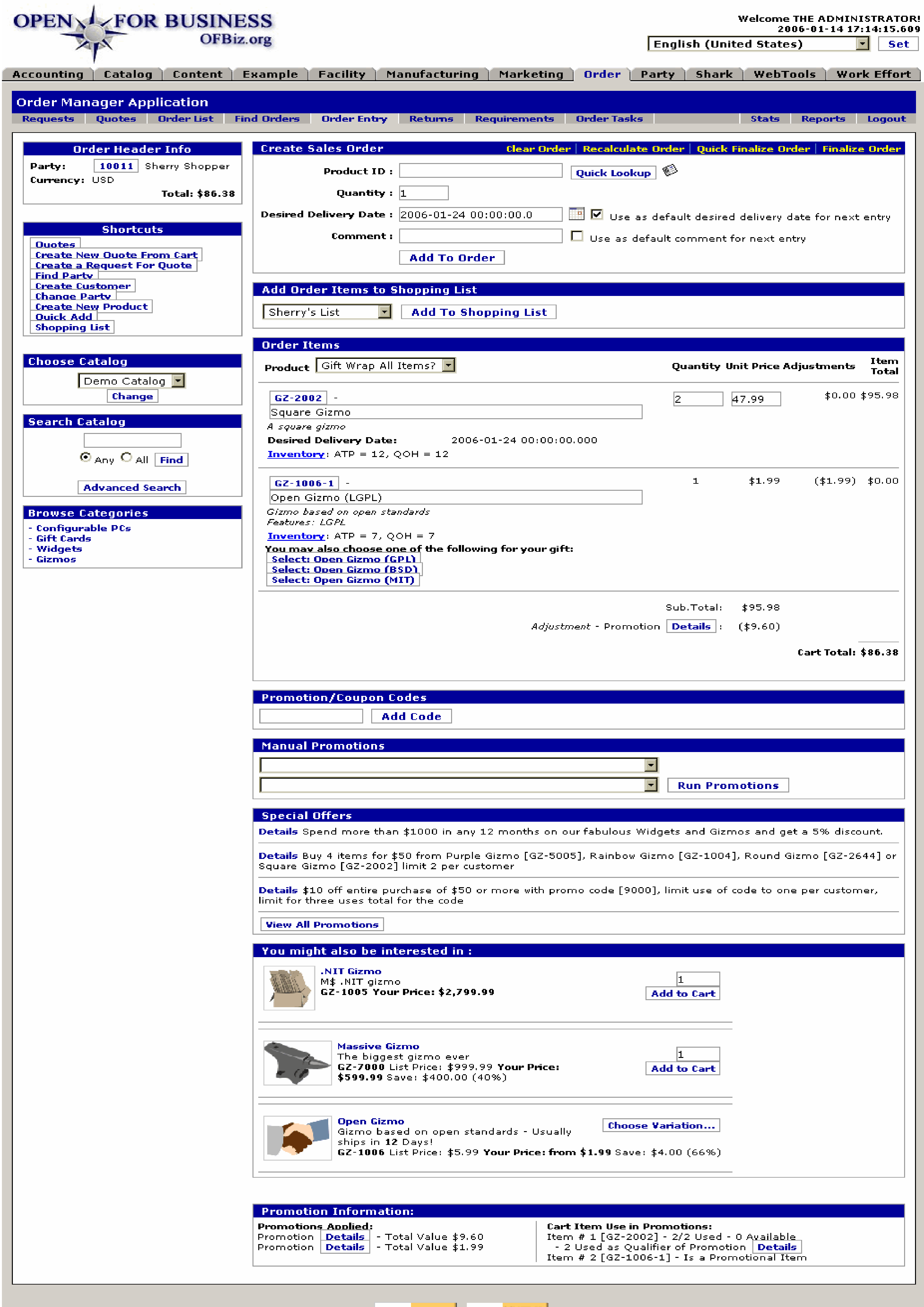
## .6.2 Sales Order Entry

### .6.2.1 Discussion

You can return to this screen from the catalog selection windows by clicking on the Order Entry tab or the [Order Items] link.

NOTE: Order entry through the ecommerce website will be different from the process here in the OFBiz Order Entry tab.

### .6.2.2 modifycart


OPEN FOR BUSINESS
OFBiz.org
Welcome THE ADMINISTRATOR!
2006-01-14 17:14:15.609
English (United States)
Set
Accounting | Catalog | Content | Example | Facility | Manufacturing | Marketing | Order | Party | Shark | WebTools | Work Effort
Order Manager Application
Requests | Quotes | Order List | Find Orders | Order Entry | Returns | Requirements | Order Tasks | Stats | Reports | Logout
Order Header Info
Party: 10011 Sherry Shopper
Currency: USD
Total: $86.38
Shortcuts
Quotes
Create New Quote From Cart
Create a Request For Quote
Find Party
Create Customer
Change Party
Create New Product
Quick Add
Shopping List
Choose Catalog
Demo Catalog
Change
Search Catalog
Any All Find
Advanced Search
Browse Categories
- Configurable PCs
- Gift Cards
- Widgets
- Gizmos
Create Sales Order
Clear Order | Recalculate Order | Quick Finalize Order | Finalize Order
Product ID :
Quick Lookup
Quantity : 1
Desired Delivery Date : 2006-01-24 00:00:00.0
Use as default desired delivery date for next entry
Comment :
Use as default comment for next entry
Add To Order
Add Order Items to Shopping List
Sherry's List
Add To Shopping List
Order Items
Product Gift Wrap All Items?
Quantity Unit Price Adjustments Item Total
GZ-2002 -
Square Gizmo
2 47.99 $0.00 $95.98
A square gizmo
Desired Delivery Date: 2006-01-24 00:00:00.000
Inventory: ATP = 12, QOH = 12
GZ-1006-1 -
Open Gizmo (LGPL)
1 $1.99 ($1.99) $0.00
Gizmo based on open standards
Features: LGPL
Inventory: ATP = 7, QOH = 7
You may also choose one of the following for your gift:
Select: Open Gizmo (GPL)
Select: Open Gizmo (BSD)
Select: Open Gizmo (MIT)
Sub.Total: $95.98
Adjustment - Promotion Details : ($9.60)
Cart Total: $86.38
Promotion/Coupon Codes
Add Code
Manual Promotions
Run Promotions
Special Offers
Details Spend more than $1000 in any 12 months on our fabulous Widgets and Gizmos and get a 5% discount.
Details Buy 4 items for $50 from Purple Gizmo [GZ-5005], Rainbow Gizmo [GZ-1004], Round Gizmo [GZ-2644] or Square Gizmo [GZ-2002] limit 2 per customer
Details $10 off entire purchase of $50 or more with promo code [9000], limit use of code to one per customer, limit for three uses total for the code
View All Promotions
You might also be interested in :
.NIT Gizmo
M$ .NIT gizmo
GZ-1005 Your Price: $2,799.99
1
Add to Cart
Massive Gizmo
The biggest gizmo ever
GZ-7000 List Price: $999.99 Your Price: $599.99 Save: $400.00 (40%)
1
Add to Cart
Open Gizmo
Gizmo based on open standards - Usually ships in 12 Days!
GZ-1006 List Price: $5.99 Your Price: from $1.99 Save: $4.00 (66%)
Choose Variation...
Promotion Information:
Promotions Applied:
Promotion Details - Total Value $9.60
Promotion Details - Total Value $1.99
Cart Item Use in Promotions:
Item # 1 [GZ-2002] - 2/2 Used - 0 Available
- 2 Used as Qualifier of Promotion Details
Item # 2 [GZ-1006-1] - Is a Promotional Item

## .6.2.3 link buttons

[Quotes] [Create New Quote From Cart] [Create a Request For Quote] [Find Party] [Create Customer] [Change Party] [Create New Product] [Quick Add] [Shopping List] [Change] [Find] [Advanced Search] [Details] [Quick Lookup] [Add To Order] [Add To Shopping List] [Inventory] [Add Code] [Run Promotions] [View All Promotions] [Add to Cart] [Choose Variation] [Clear Order] [Recalculate Order] [Quick Finalize Order] [Finalize Order]

## .6.2.4 Order Header Info

### .6.2.4.1 Party

Includes Party ID number and purchaser's FirstName LastName. Click on the ID to view the Party Profile under the Party Manager.

### .6.2.4.2 Currency

This is the Currency UOM ID. In this case shown, USD for US dollars.

### .6.2.4.3 Total

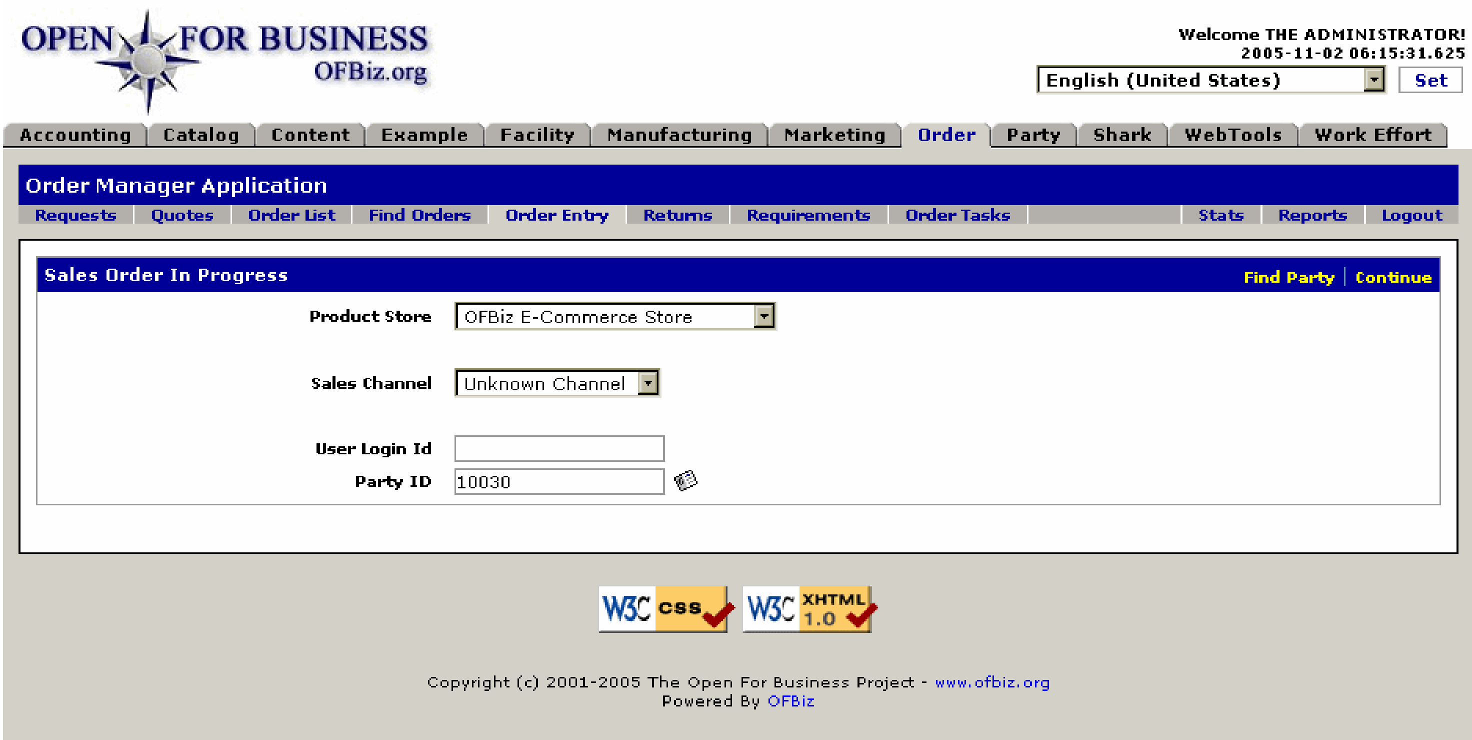
This is a running total of purchases, less discount, but not including taxes, credits or shipping.

## .6.2.5 Shortcuts

### .6.2.5.1 Discussion

These links take you to related screens, often with data populated from wherever you are in the Sales Order Entry process. When you have jumped to these other processes, you can often return to your Order by clicking on the browser back button. It might take you to the following screen. Although it looks familiar, note the phrase, 'Sales Order In Progress.' Enter the User ID and press [Continue] to restore the Order Entry screen.

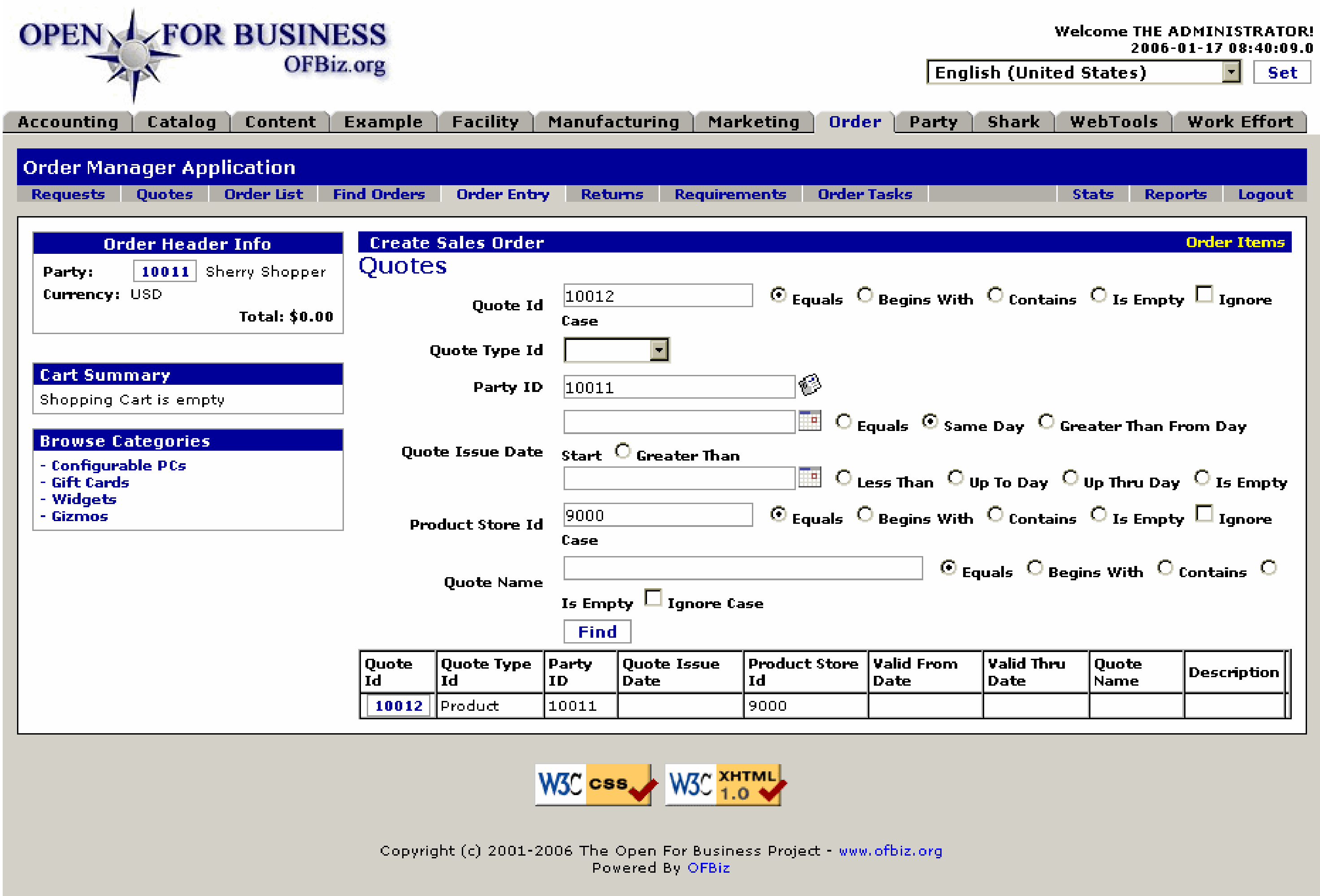
### .6.2.5.1.1 additem-return




Enter the Party ID then press [Continue] to return to the Order Entry in progress.

## .6.2.5.2 Quotes

### .6.2.5.2.1 FindQuoteForCart




The table at the bottom remains empty until after a successful search. Only Approved or higher status Quotes returned.

### .6.2.5.2.2 Discussion

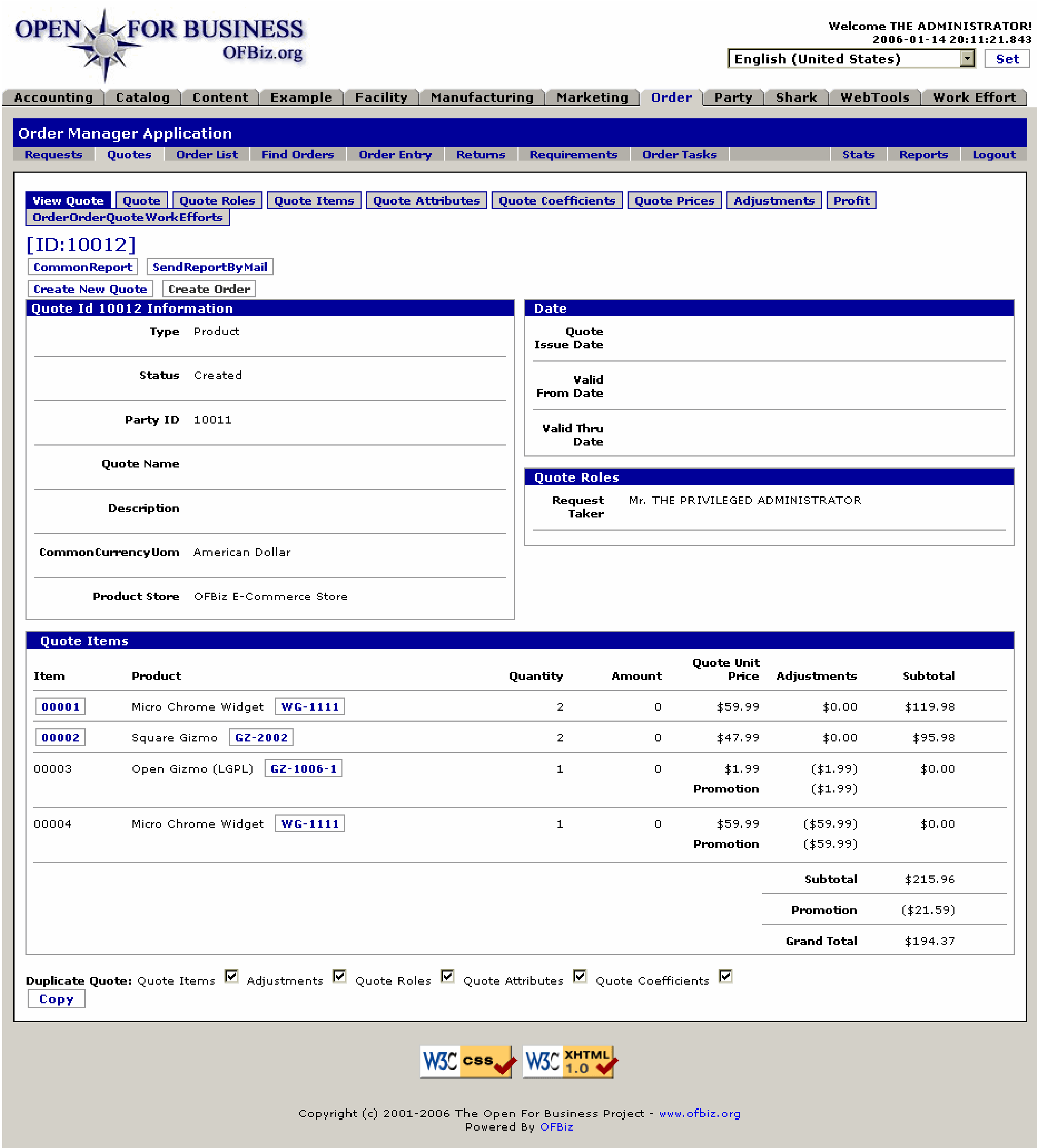
If you attempt to search for a Quote which has been Created, but not yet Approved, the search will return empty.

Unlike most screens, if you click on the Quote ID, you will NOT view further details of the Quote. Rather, you are presented with an Order Entry screen to proceed with the Order based upon the contents of the Quote.

Then, simply click on the main Order Entry tab and the Order Entry screen will be populated with the contents of the quote at the prices quoted therein.

## .6.2.5.3 Create New Quote from Cart

### .6.2.5.3.1 createQuoteFromCart




Enters the current items from the Order Entry into a new Quote at the Quotes tab > View Quotes sub-tab for further processing.

## .6.2.5.3.2 Discussion

Note how all the Promotional items are also dropped into this Quote; their presence can be a negotiation point as you refine the Quotation with the customer.

From this point you could further refine the Quote through the normal processes under this Quote tab or return to the Order Entry process. Depending upon how far you were into the process, you can either back-button into your screen or click on the Order Entry tab.

## .6.2.5.4 Create a Request for Quote

### .6.2.5.4.1 createCustRequestFromCart


This shortcut links you to the Requests tab with Party ID and items in place for a new Request for Quote.

### .6.2.5.4.2 Discussion

From here you can develop the Request into a Quote or process the input as an inquiry. Or, you can return to the Order Entry screen if the customer is ready to order.

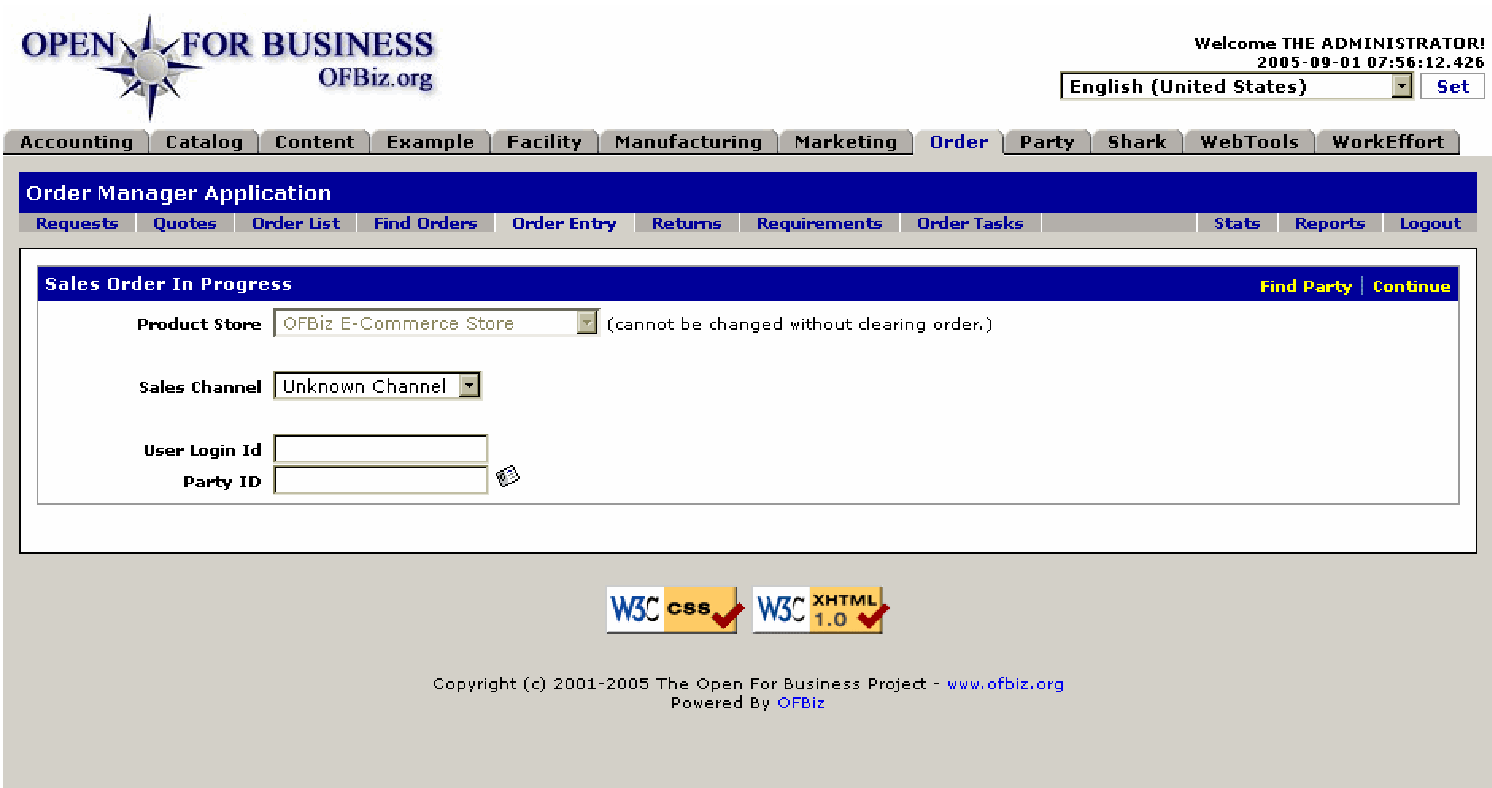
## .6.2.5.5 Find Party

The [Find Party] link takes you out of the Sales Order entry process to the Party Manager Find Party screen.

## .6.2.5.6 Create Customer

(Under development.)

## .6.2.5.7 Change Party




The [Change Party] screen gives you an opportunity to re-identify the ordering Party without losing entry data.

## .6.2.5.8 Create New Product

This link opens a new browser window in the Catalog Manager - Create Product screen. This would be useful if your customer wanted a product which you have on hand but had not yet entered into the system. You can 'create' the product for establishing it in the system without interrupting the sales order process.

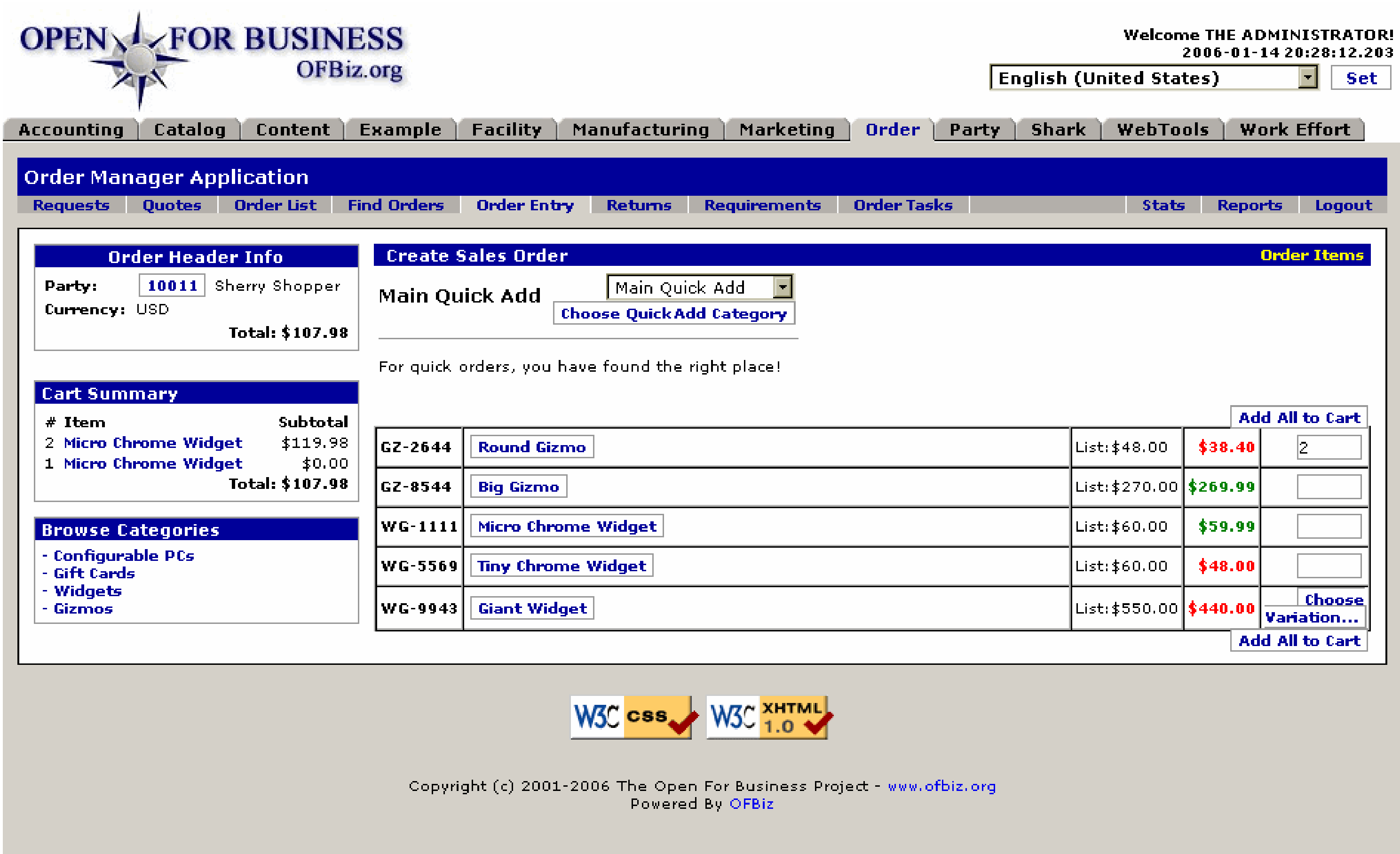
## .6.2.5.9 Quick Add

### .6.2.5.9.1 Discussion

This feature dispenses with the promotions and other links, displays only those products listed in a small category, and streamlines the order entry process.

Created in the Catalog Manager, each small Quick Add catalog can focus on a unique category of products. These Quick Add categories are then used only here in the Sales Order process to focus the ordering process on the type of products which interest the buyer.

### .6.2.5.9.2 quickadd




Quick Add items exist within Quick Add categories; select the category to display the product.

### .6.2.5.9.3 link buttons

[Choose QuickAdd Category] [Choose Variation] [Add All to Cart] [Order Items]

### .6.2.5.9.4 Choose Category (drop-down box)

The label is also the action button: click on it to bring up the Category chosen from the drop-down box.

### .6.2.5.9.5 Table of Products

The table has columns for each of the following:

- Product ID
- Product name Click name for
- product page.
- List price
- Sales price
- Quantity desired

## .6.2.5.10 Shopping List

### .6.2.5.10.1 shoppinglist-1

**Create Sales Order** — Clear Order | Recalculate Order | Quick Finalize Order | Finalize Order

| Shopping List | List Type | Description | | |
|---|---|---|---|---|
| Sherry's List | Frequent Purchases | | View List | Quick Add All |
| New Shopping List | Wish List | | View List | Quick Add All |

All shopping lists for the customer are listed; select one by name.

### .6.2.5.10.2 addFromShoppingList

**Create Sales Order** — Clear Order | Recalculate Order | Quick Finalize Order | Finalize Order

| Shopping List Id | Shopping List Item Seq Id | Product | Quantity | Reserv Start | Reserv Length | Reserv Persons | Quantity Purchased | |
|---|---|---|---|---|---|---|---|---|
| 10000 | 00001 | WG-1111 - Micro Widget - Chrome Colored | 1 | | 0 | 0 | | Add 1.0 to Order |
| 10000 | 00002 | GZ-5005 - The stylish gizmo | 1 | | 0 | 0 | | Add 1.0 to Order |
| 10000 | 00003 | GZ-9290 - A set of his/her gizmos | 1 | | 0 | 0 | | Add 1.0 to Order |

Quick Add All

Return

Upon choosing a Shopping List [View], that List is shown in this table.

### .6.2.5.10.3 Discussion

You can either select an item and click on the link [Add … to Order], or click on [Quick Add All]. Your action is performed and you are returned to the full editOrder screen.

## .6.2.6 Choose Catalog (drop-down box)

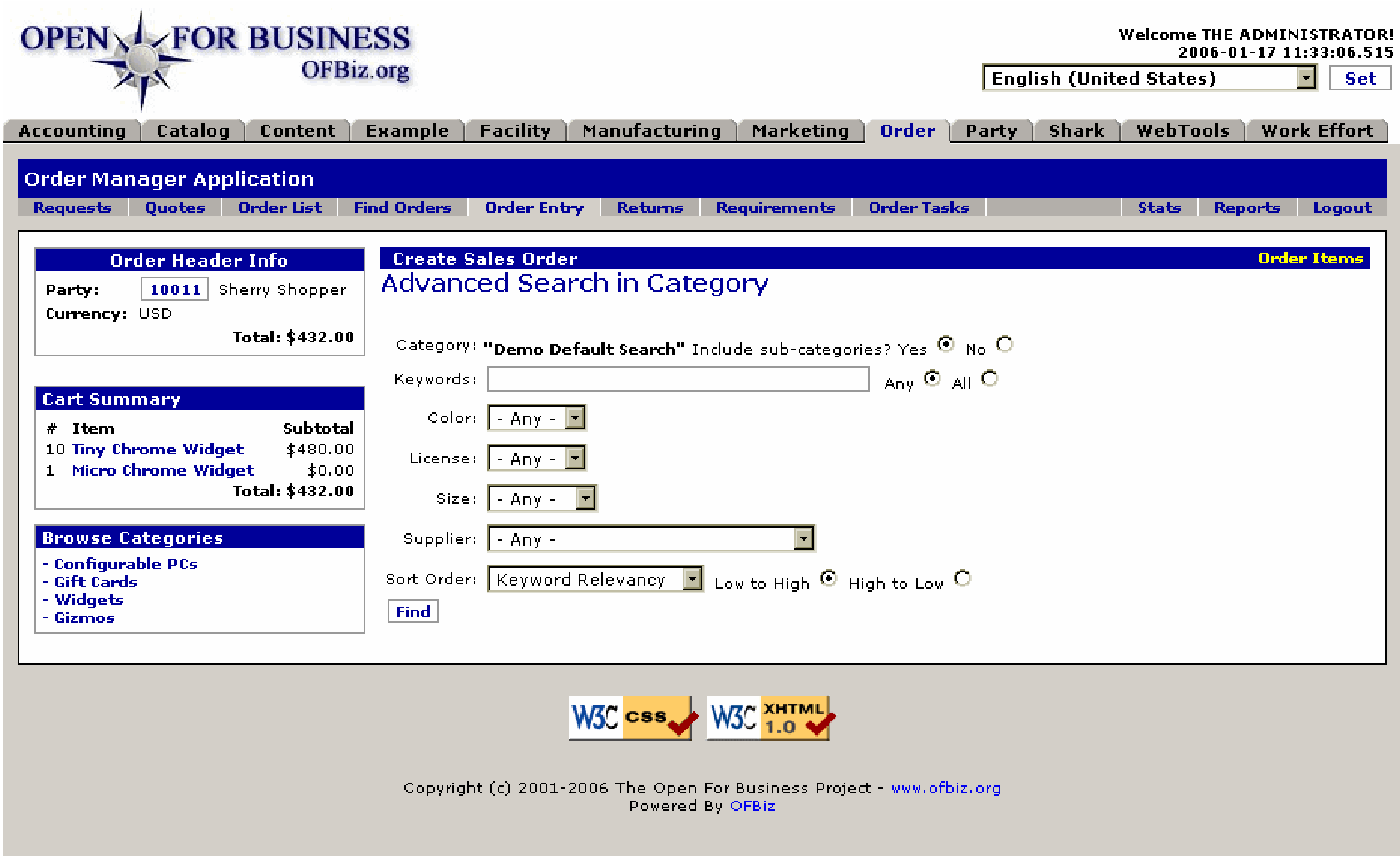
As the use of this screen is to take orders, quick access to the various catalogs is provided here with a drop-down box for selecting from among them.

## .6.2.7 Search Catalog

### .6.2.7.1 Quick Search or Advanced Search

Limited to items selected in the chosen Catalog, you can enter the Product ID or a keyword here for a quick search of the item. If you click on [Advanced Search], you will bring up the screen shown below.

### .6.2.7.2 SO-advancedsearch




While still within the Sales Order Entry process, you can help the customer find items using these advanced search options.

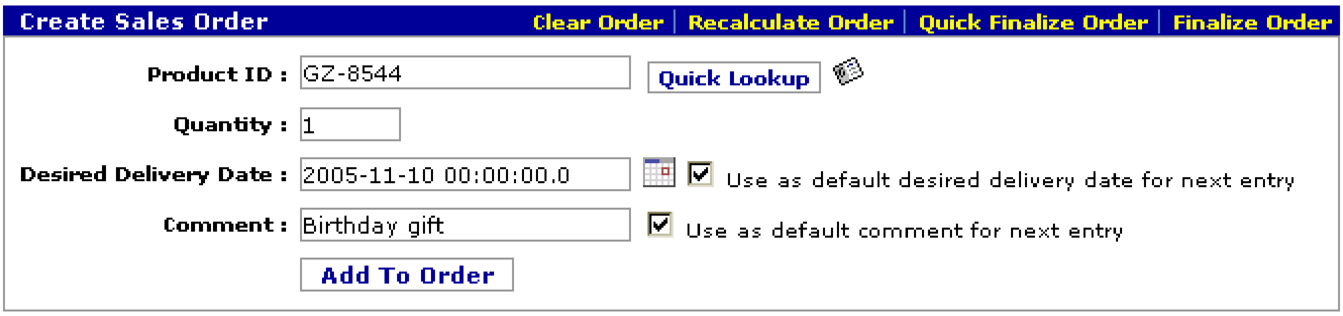
## .6.2.8 Browse Categories

Existing product categories are listed here; click on a preferred one and products contained therein will be displayed.

Click on the link [Order Items] to return to the primary Order Entry screen.

## .6.2.9 Create Sales Order

### .6.2.9.1 CreateSalesOrder




This section, where items are selected and added, is the heart of the ordering process.

### .6.2.9.2 link buttons

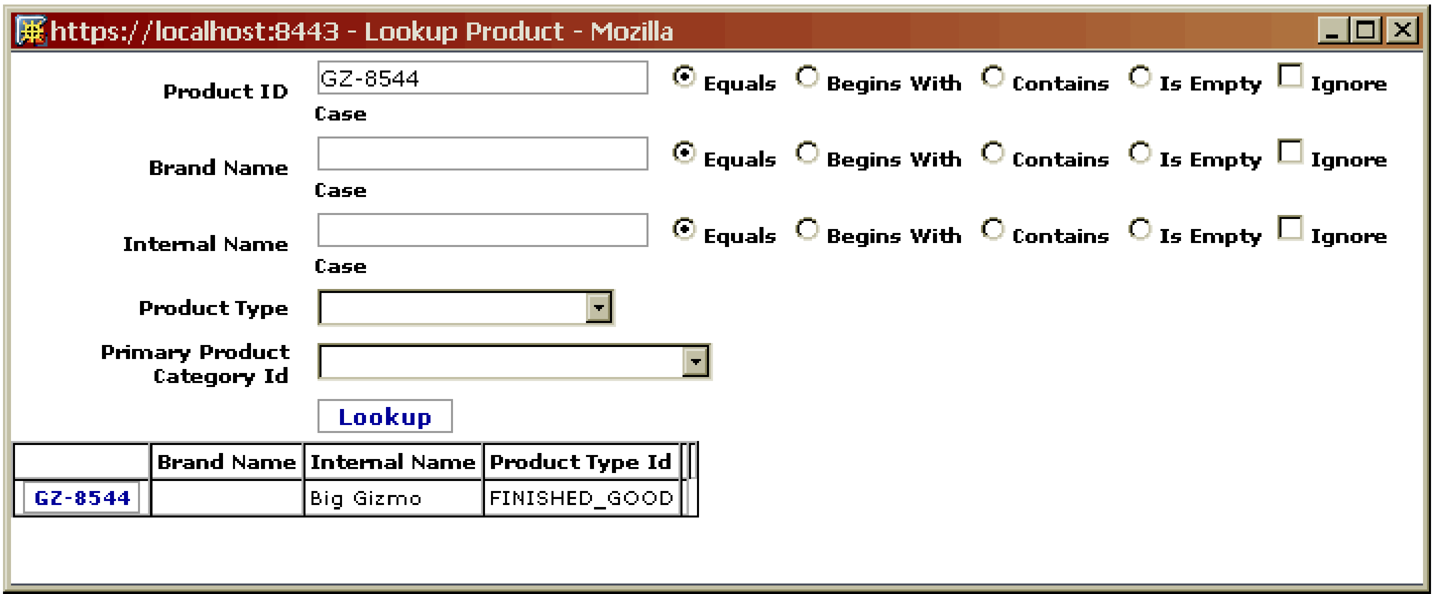
[Add To Order] [Quick Lookup] [Clear Order] [Recalculate Order] [Finalize Order]

### .6.2.9.3 Product ID (popup)

If you click on the popup search button, a powerful screen appears which will help you find any product through a variety of approaches. Once a product is chosen, it will automatically populate here and the popup will disappear.

## .6.2.9.4 Quick Lookup

### .6.2.9.4.1 Quick Lookup




After Product ID is entered, Quick Lookup brings up this link to view product details.

### .6.2.9.4.2 link buttons

[Lookup]

### .6.2.9.4.3 Discussion

After a Product ID has been entered in the Order Entry, you can select Quick Lookup to bring up this screen.

Here you see the Product ID already populated (if it was accurately entered) along with some information about the product. The form can then be used to locate other products.

## .6.2.9.5 Quantity

How many does the customer want? Automatically defaults to 1.

## .6.2.9.6 Desired Delivery Date (popup calendar)

Popup calendar facilitates date entry.

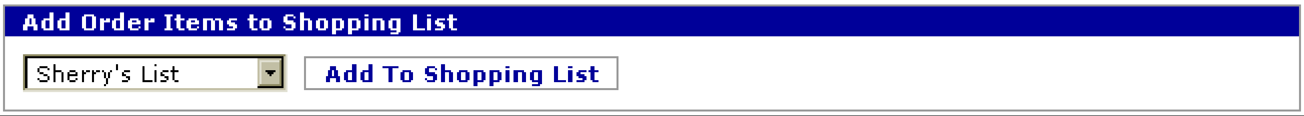
With the checkbox to 'Use as default desired delivery date for next entry,' you can save having to re-enter this information with each item. Should a subsequent item need a different delivery date, this selection can be overridden at that time.

### .6.2.9.7 Comment

With the checkbox to 'Use as default comment for next entry,' you can save having to re-enter this information with each item. Should a subsequent item need a different comment, this selection can be overridden at that time.

## .6.2.10 Add Order Items to Shopping List

### .6.2.10.1 AddToList




Choose a shopping list from the drop-down box, then click the [Add To Shopping List] link.

### .6.2.10.2 link buttons

[Add To Shopping List]

### .6.2.10.3 Discussion

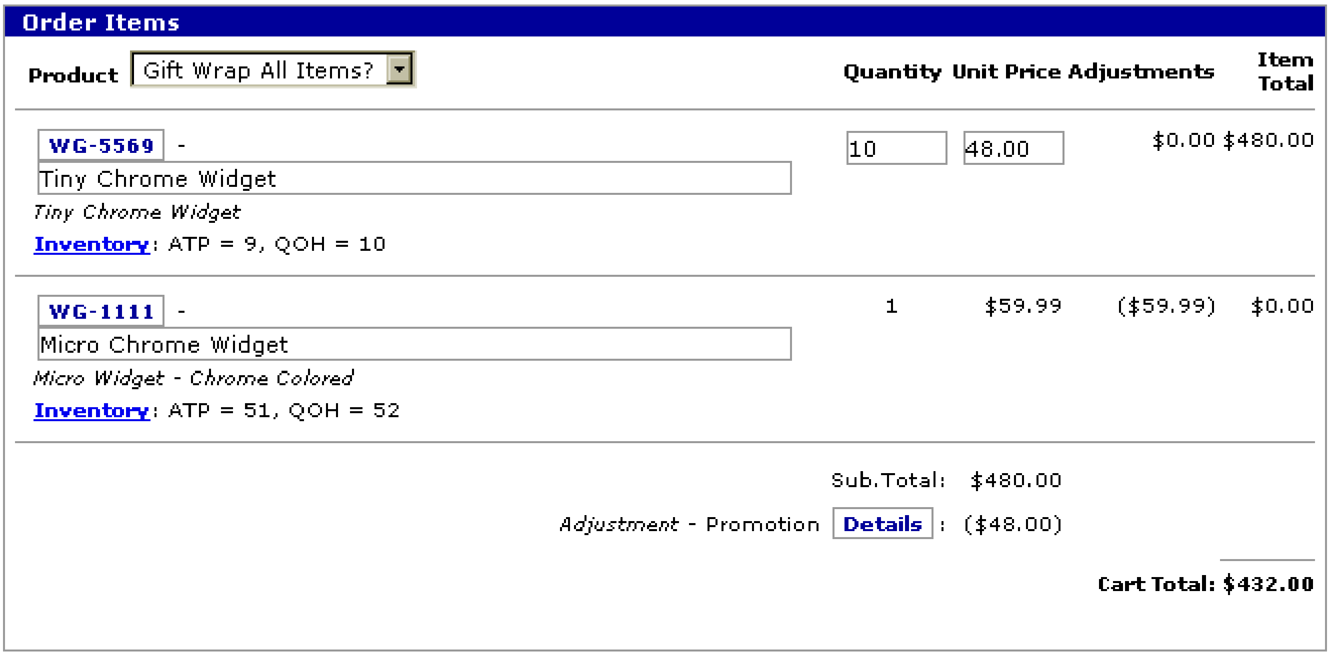
If the customer indicates a desire to regularly re-order this item, select one of their Shopping Lists and click on the link [Add to Shopping List]. When they re-order you will be able to quickly enter the item when you ask them, And which shopping list will you be ordering from today?

## .6.2.11 Order Items

### .6.2.11.1 Discussion

Nothing is shown here until after a first item has been added to the order. Then the details are presented as shown below. Note that free promotional add-ons are also included whenever the customer has entered certain items or reached a purchase level that qualifies them.

### .6.2.11.2 OrderItemsEntered




Ordered items may also have quantities changed or unit prices adjusted.

### .6.2.11.3 link buttons

[Select:...] [Details] [Inventory]

### .6.2.11.4 Product

Shown are the Product ID, the product name, and the description. Click on Product ID for more product details.

Note that Desired Delivery Date for the item and any Comments are printed out on a line underneath the Product information.

### .6.2.11.5 Gift Wrap option (drop-down box)

Options pre-set to 'Gift wrap all items?' or 'No gift wrap.'

### .6.2.11.6 Comment

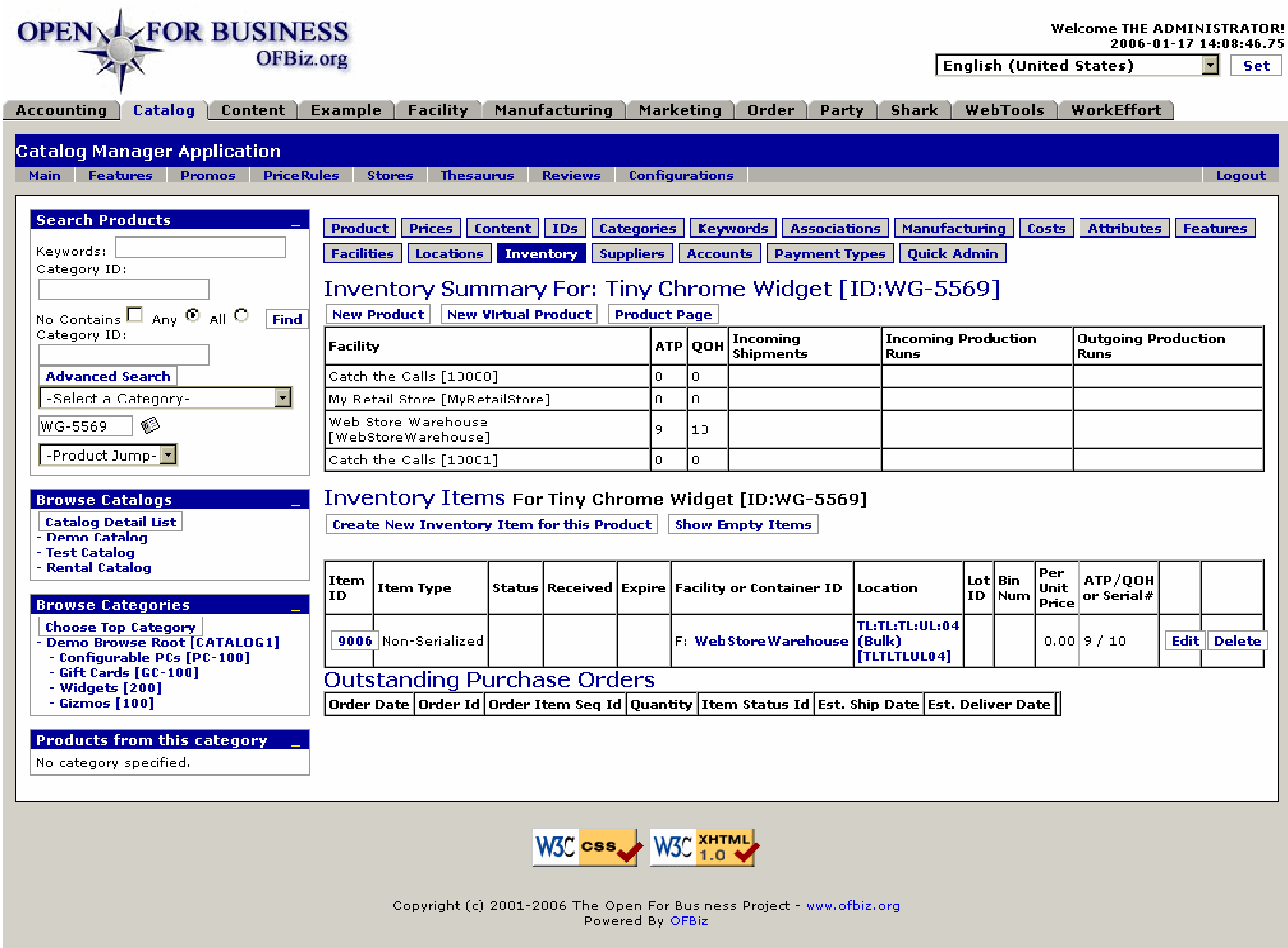
This is to capture comments made by ordering parties such as 'This is an anniversary gift!' By carrying such comments through the order fulfillment process, mistakes can be avoided.

## .6.2.11.7 Desired Delivery date

This was selected during the item entry process. It may vary with each item or be maintained for all items. If the desired delivery date is unrealistic because of inventory or shipping difficulties, be sure to alert the customer.

## .6.2.11.8 Inventory

### .6.2.11.8.1 orderitemInventory




This screen under the Catalog Manager > Main > Inventory screen for the selected product shows full inventory details.

### .6.2.11.8.2 Discussion

On the Order screen, shows the ATP/QOH for this item immediately, allowing the order taker to determine delivery availability. Click on the [Inventory] link to see the screen shown above, then use the browser back-button to return to the order screen.

From this Inventory screen you can make adjustments to Inventory, locate additional Inventory, and see quickly what it will take to get the items for your customer.

## .6.2.11.9 Quantity

Note that the quantity for ordered items can be adjusted within this frame. This acccomodates the customer that suddenly decides to double an order, for example.

Quantity of the promotional items added by the system is indicated, but cannot be changed.

If the customer prefers NOT to receive any of the Promo items, they be removed later in the order approval process.

## .6.2.11.10 Unit Price

Note how this price can be modified here. This will accommodate changes to fulfill Quotes or to make adjustments agreed upon elsewhere. Promotional items cannot be adjusted.

## .6.2.11.11 Adjustments

These are calculated by the system based upon price rules, promotions and other considerations. Reductions in price are placed inside parentheses ( ).

## .6.2.11.12 Item Total

Essentially the result of Quantity times Unit Price minus Adjustments.

## .6.2.11.13 Summary section

### .6.2.11.13.1 Sub Total

Sum of the costs before adjustments, taxes or shipping.

### .6.2.11.13.2 Adjustments

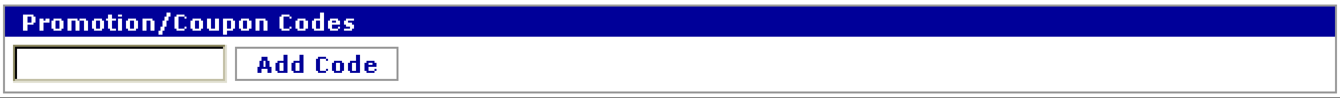
Click on [Details] to obtain details about the Adjustments.

### .6.2.11.13.3 Cart Total

The sum of the sub-totals plus adjustments. This still does not include shipping or taxes which are calculated in later.

## .6.2.12 Promotion/Coupon Codes

### .6.2.12.1 PromoCodes




Promo codes from advertising campaigns can be entered here to obtain discounts.

### .6.2.12.2 link buttons

[Add Code]

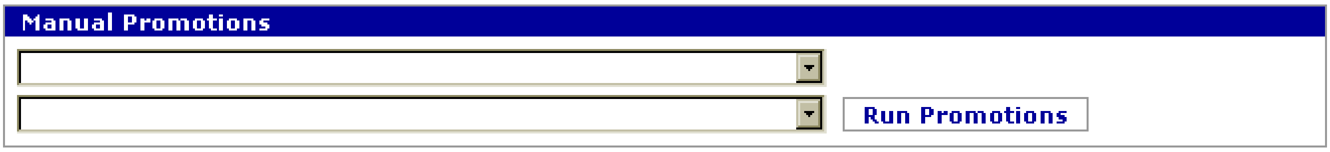
### .6.2.12.3 Code entry box

When a promotional offer is made outside of the system, in a print flyer, journal, or an email solicitation, for example, this is where the Code is entered to qualify the customer for the promotion.

Promotion Codes enable tracking of the results of promotional efforts and can confirm the effectiveness of advertising money spent to bring customers to this point.

## .6.2.13 Manual Promotions

### .6.2.13.1 manualPromotions




Use the drop-down box to bring up other Promotions to apply to this order.

### .6.2.13.2 link buttons

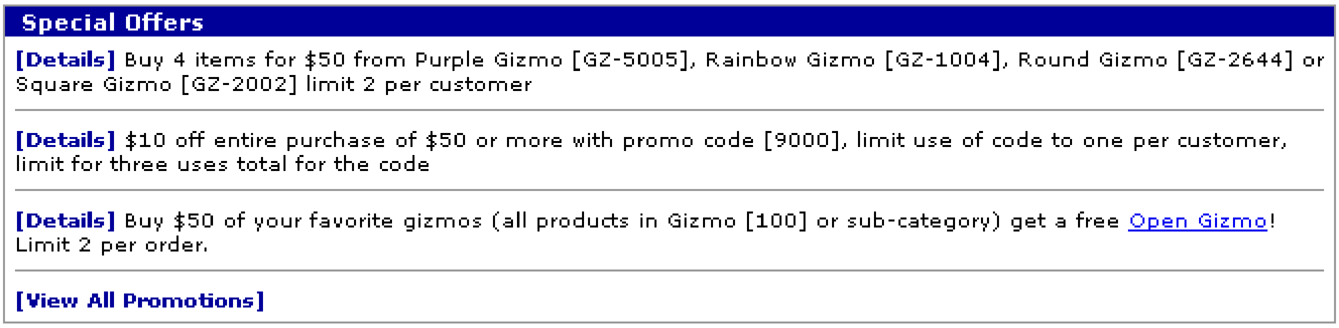
[Run Promotions]

### .6.2.13.3 Discussion

Choose one or two existing Promotions from the drop-down box(es), then click on [Run Promotions]. The terms of the Promotion will be applied to the Sales Order.

## .6.2.14 Special Offers

### .6.2.14.1 SpecialOffers



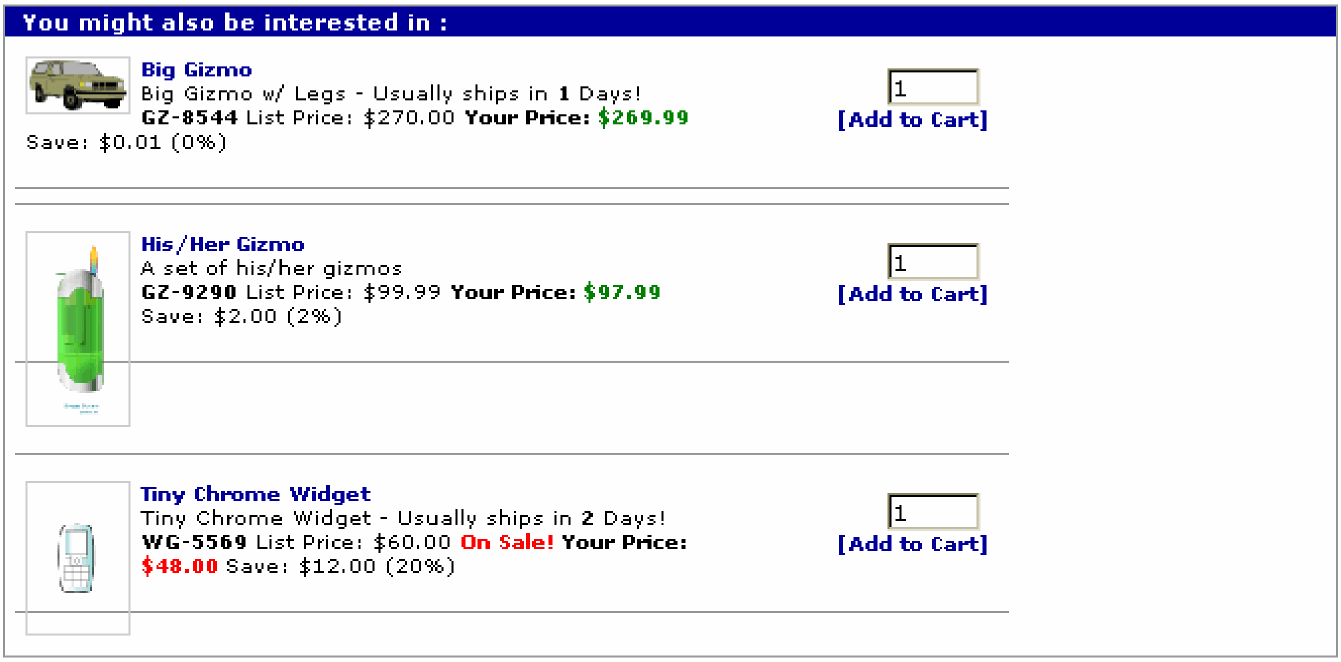

Presents a synopsis of Special Offers; click [Details] for details.

### .6.2.14.2 link buttons

[Details] [View All Promotions]

## .6.2.15 You might also be interested in:

### .6.2.15.1 YouMightAlso




Promos with squibs to encourage impulse purchases. Click name for details.

### .6.2.15.2 link buttons

[Add to Cart]

### .6.2.15.3 Item squib

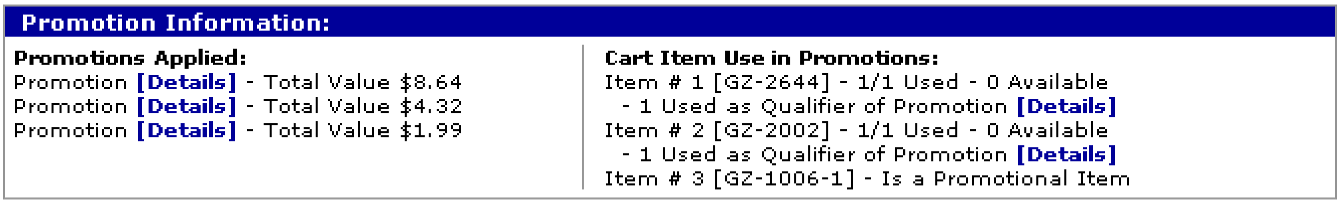
A graphic can be given with the text to help identify the item. This is most useful in the ecommerce portion of the application, but the same product description is presented here with the squib.

### .6.2.15.4 Quantity

Customers are encouraged to ask for more than one of the promoted items by entering a quantity for this purchase.

## .6.2.16 Promotion Information

### .6.2.16.1 PromoInfo




This information is specific to ordered items, listed by Item #.

### .6.2.16.2 link buttons

[Details]

### .6.2.16.3 Promotions Applied

Every Promotion that was applied to this order is listed with a link to more information about the promotion. Click on [Details] to obtain more specifics. The value of each Promotion item is given in this section.

### .6.2.16.4 Cart Item Use in Promotions

Listed by Item number, each of the promotion items either qualifying for a discount or being given as a promo item are given. For explanations of the qualifying purchase, click on [Details].

## .6.3 Recalculate Order

Before moving to Finalize the order, you should probably click once upon the Recalculate Order link to bring in any final adjustments needed, allowing the system to consider minor changes you might have made.

Added by Ian McNulty, last edited by Ian McNulty on Mar 02, 2007 (view change)

Labels:

(None)

**Add Labels**

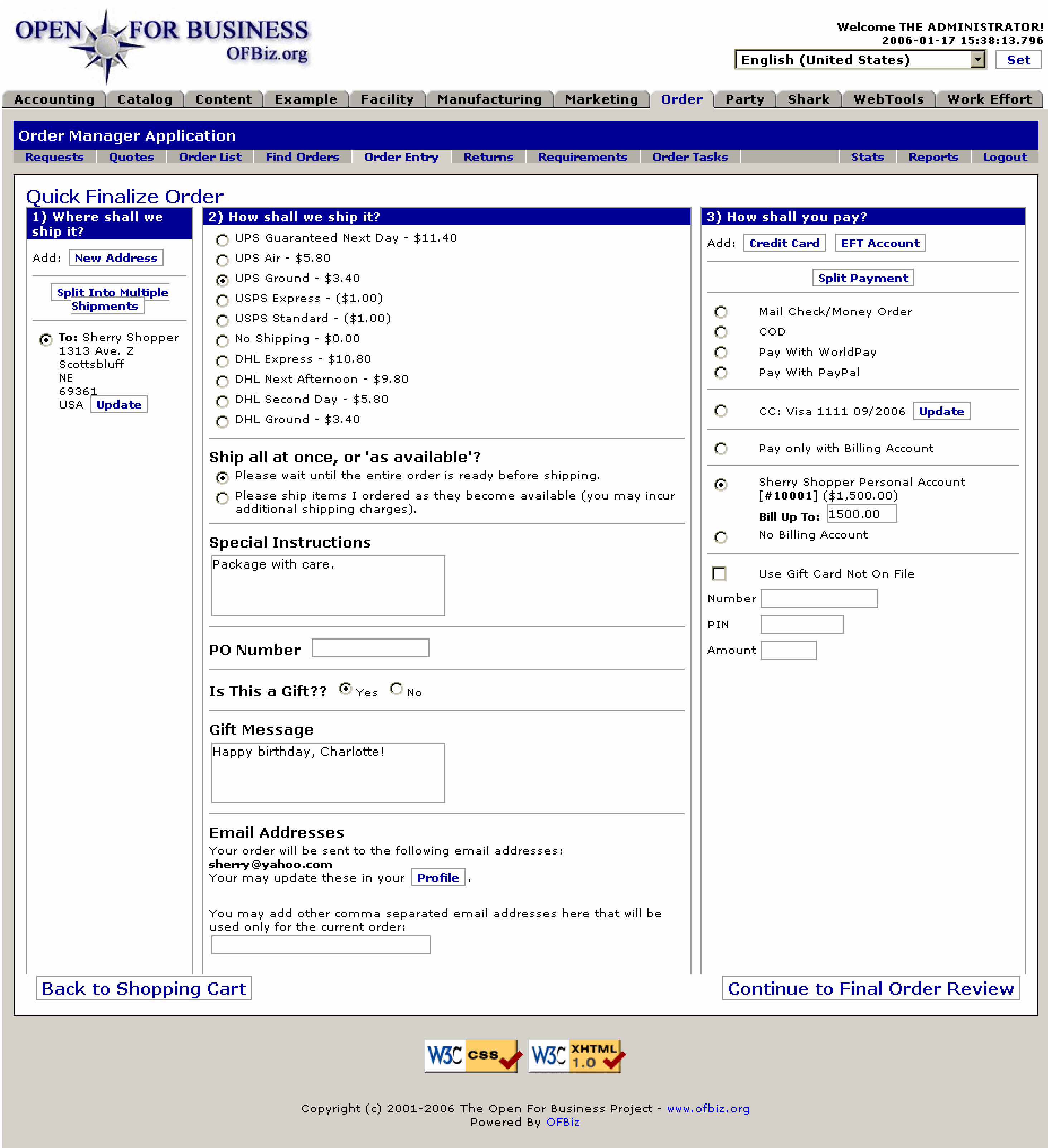
Enter labels to add to this page:

Add

*Tip:* Looking for a label? Just start typing.

## .6.4 Quick Finalize Order

### .6.4.1 QuickCheckout




Process sections 1 - 2 - 3, and you have accomplished the steps from several normal screens at one place.

## .6.4.2 link buttons

[New Address] [Split Into Multiple Shipments] [Update] [Credit Card] [EFT Account] [Split Payment] [Profile] [Back to Shopping Cart] [Continue to Final Order Review]

## .6.4.3 Discussion

You have a choice. You may process with the normal sequence of Order Entry screens, or you may consolidate several of the steps here into the Quick Finalize Order.

As soon as the shipping address (or addresses for a split shipment) have been confirmed, shipping costs will appear in section 2.

Select the appropriate radio button to assign the shipping method. Complete the remaining information in this central section, then move on to section 3.

Payment options include bringing up a previously-established method (credit card, EFT, or Gift Card), paying with one of the radio button methods, or introducing new payment vehicles as shown. Choose or update as needed and, when ready, click on the bottom link [Continue to Final Order Review].

## .6.4.4 (1) Where shall we ship it?

### .6.4.4.1 Add new address

Brings up the screen to 'Create New Shipping Address' which is added to the ordering Party's contacts.

### .6.4.4.2 Link: Split Into Multiple Shipments

Not currently operating. Will allow the shipment to be divided into multiple recipient addresses.

### .6.4.4.3 Select Shipment Address

Each address currently associated with the ordering Party as a Destination Address appears with a radio button.

Click on the associated radio button to assign the shipping address. If the desired address is not there (for the purpose of a gift recipient, perhaps), use the Add New Address link above to create the new address. Alternatively, you can go to the Party Manager and create the new address there.

## .6.4.5 (2) How shall we ship it?

### .6.4.5.1 Select a carrier

Use the radio button associated with the desired shipping method to select. Shipping costs will populate as soon as the destination address has been confirmed.

### .6.4.5.2 Ship all at once, or ...

Be sure the customer understands the ramification of either of the two choices:

(1) Please wait until ... means that if any item in the order is not available for shipment (and you as the order taker can reasonably determine that probability from the ATP/QOH numbers), the shipment will be held up until everything is ready to go.

(2) ... as they become available ... will release the shipment with whatever items are currently in stock.

Back orders will be sent in a separate shipment; this will increase the shipping costs.

### .6.4.5.3 Special Instructions

Enter any special shipping instructions here. For example, maybe the package should be left on the porch even if no one can sign for it. Or, if multiple recipients at the same address, instructions to pack each item in a separate package.

### .6.4.5.4 PO Number

If the customer ordered by Purchase Order, enter their PO number here.

### .6.4.5.5 <I>Is This a Gift? </I>

Select Yes or No with the radio button. This signals whether to include the following Gift Message and whether to gift wrap the item.

### .6.4.5.6 Gift Message

Enter the text desired by the ordering party to accompany this gift to the recipient. You might need to suggest contents to the customer, but be sure they agree with whatever will be entered here.

### .6.4.5.7 Email Addresses

This will populate with the default email address for the ordering party. They might want to alert the recipient or others that an order is coming.

For example, if a company is sending out items to several of their subsidiaries or salemen, they could each be notified by this messaging method. Or, perhaps a notice needs to go to the recipient with the Purchasing Department being the original Party involved.

## .6.4.6 (3) How shall you pay?

### .6.4.6.1 Add:

Use the links to add a Credit Card or EFT Account to the payment options.

### .6.4.6.2 Link - Split Payment

When this option is completed, you will be able to divide the cost of the order among two or more parties. Click on the link to see if has been implemented yet.

### .6.4.6.3 Payment options

Some of the options will appear for any ordering party; others are presented only when they exist, such as Gift Card accounts, EFT accounts, Credit Cards, etc. Use the radio button to indicate which way this customer will be paying.

An [Update] link is provided for some accounts in case an account needs information changed, such as expiration dates or billing addresses.

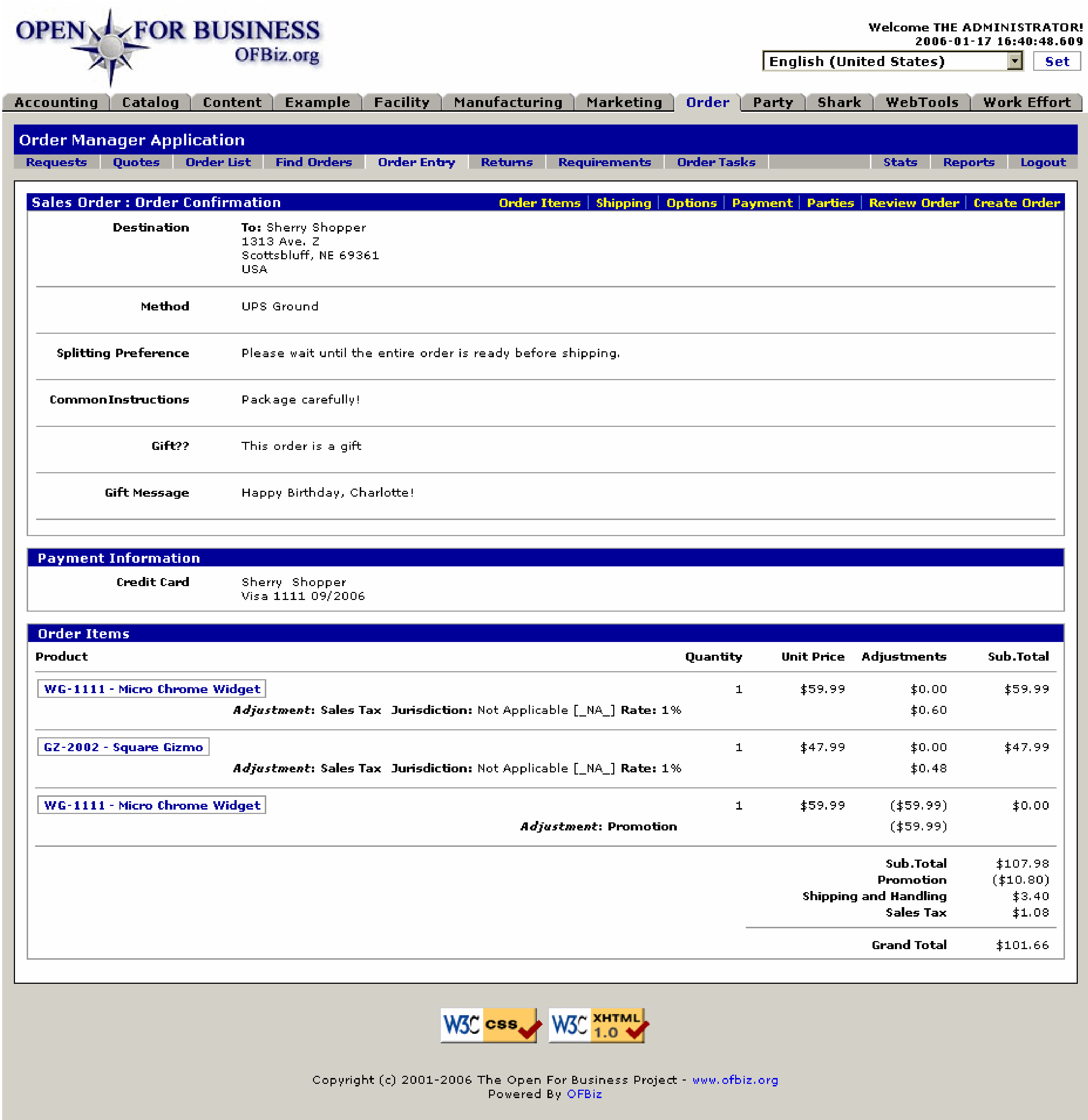
If this is to be charged to a Gift Card not associated with the Party, click on the box and enter the details.

## .6.4.7 Continue with the order

### .6.4.7.1 Continue to Final Order Review link

Click on this link in the lower RH corner when you have completed all sections of this screen. You are taken to the Review screen, shown below, where you can confirm every aspect of the order before finalizing it with the customer.

## .6.4.7.2 checkout



OPEN FOR BUSINESS OFBiz.org

Welcome THE ADMINISTRATOR!
2006-01-17 16:40:48.609
English (United States) Set

Accounting | Catalog | Content | Example | Facility | Manufacturing | Marketing | Order | Party | Shark | WebTools | Work Effort

**Order Manager Application**

Requests | Quotes | Order List | Find Orders | Order Entry | Returns | Requirements | Order Tasks | Stats | Reports | Logout

**Sales Order : Order Confirmation** — Order Items | Shipping | Options | Payment | Parties | Review Order | Create Order

| | |
|---|---|
| **Destination** | **To:** Sherry Shopper<br>1313 Ave. Z<br>Scottsbluff, NE 69361<br>USA |
| **Method** | UPS Ground |
| **Splitting Preference** | Please wait until the entire order is ready before shipping. |
| **CommonInstructions** | Package carefully! |
| **Gift??** | This order is a gift |
| **Gift Message** | Happy Birthday, Charlotte! |

**Payment Information**

| | |
|---|---|
| **Credit Card** | Sherry Shopper<br>Visa 1111 09/2006 |

**Order Items**

| Product | Quantity | Unit Price | Adjustments | Sub.Total |
|---|---|---|---|---|
| WG-1111 - Micro Chrome Widget | 1 | $59.99 | $0.00 | $59.99 |
| ***Adjustment*: Sales Tax Jurisdiction:** Not Applicable [_NA_] **Rate:** 1% | | | $0.60 | |
| GZ-2002 - Square Gizmo | 1 | $47.99 | $0.00 | $47.99 |
| ***Adjustment*: Sales Tax Jurisdiction:** Not Applicable [_NA_] **Rate:** 1% | | | $0.48 | |
| WG-1111 - Micro Chrome Widget | 1 | $59.99 | ($59.99) | $0.00 |
| ***Adjustment*: Promotion** | | | ($59.99) | |
| | | | **Sub.Total** | $107.98 |
| | | | **Promotion** | ($10.80) |
| | | | **Shipping and Handling** | $3.40 |
| | | | **Sales Tax** | $1.08 |
| | | | **Grand Total** | $101.66 |

W3C css W3C XHTML 1.0



When you click on [Continue to Final Order Review], this gives an overview. If OK, click on [Create Order] to proceed.

### .6.4.7.3 link buttons

[Order Items] [Shipping] [Options] [Payment] [Partries] [Review Order] [Create Order]

### .6.4.7.4 Discussion

When you review the order, if you find any area needing changes, click on the link to take you to that part of the order entry process. For example, if you had selected to use the credit card but the customer decided to use a gift card instead, click on [Payment] to return to that screen and make changes.

Once everything is reviewed with the customer and all is correct, click on [Create Order] to proceed.

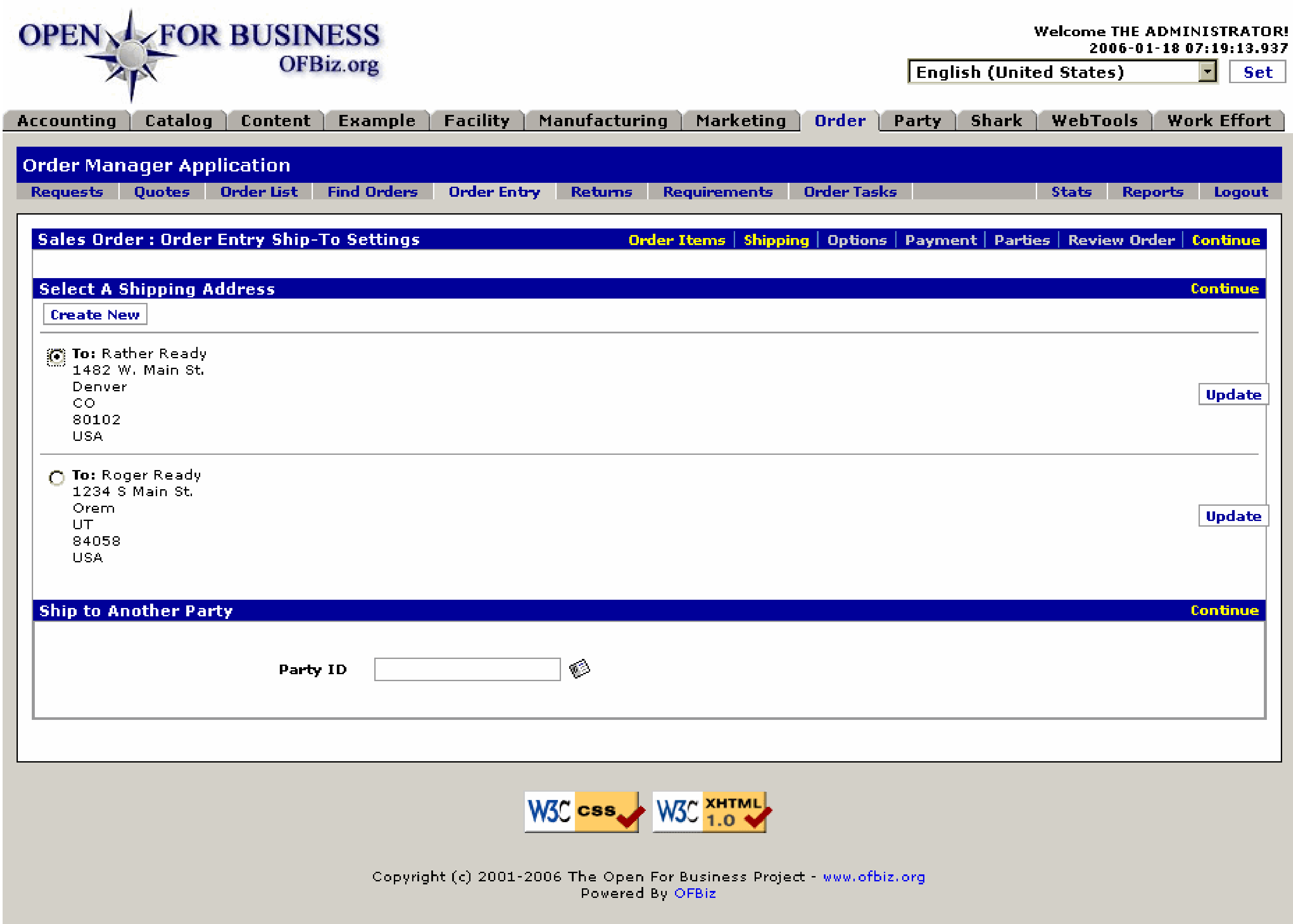
## .6.5 Finalize Order

If you have just completed the Quick Finalize Order process, you can skip then next few steps. Proceed to Continue final Order Confirmation, below.

If you did NOT use the Quick Finalize Order process, start here. This is where you confirm the Order Entry Ship-To Settings. If this is a Gift Order, be sure to request the new Ship To address. Use the [Create New] link to bring up the address fields.

After clicking on a radio button to confirm or entering the ship-to information, select [Continue] for the next screen. [Order Items] returns you to the Order Entry screen.

## .6.5.1 finalizeOrder-Sales




Confirm the Ship-To Address here. When a Party has multiple address on file, select the desired destination or add another.

## .6.5.2 link buttons

[Create New] [Update] [Order Items] [Shipping] [Continue]

## .6.5.3 Select a Shipping Address

Probably a good idea to read back the information in the address to confirm its accuracy with the customer.

1. If the customer wants to ship to someone already associated with her in the Party Manager, that address can be selected with a radio button.
2. If she wants to ship to someone not at all in the system, click on [Create New] to add another address to her file.

3. If she wants to ship to another Party with its own identity in the system, use the lower portion of this form to Ship to Another Party.

### .6.5.4 Ship to Another Party

Use the popup search tool to locate the other party. That party's Ship-to address will then be used for this order.

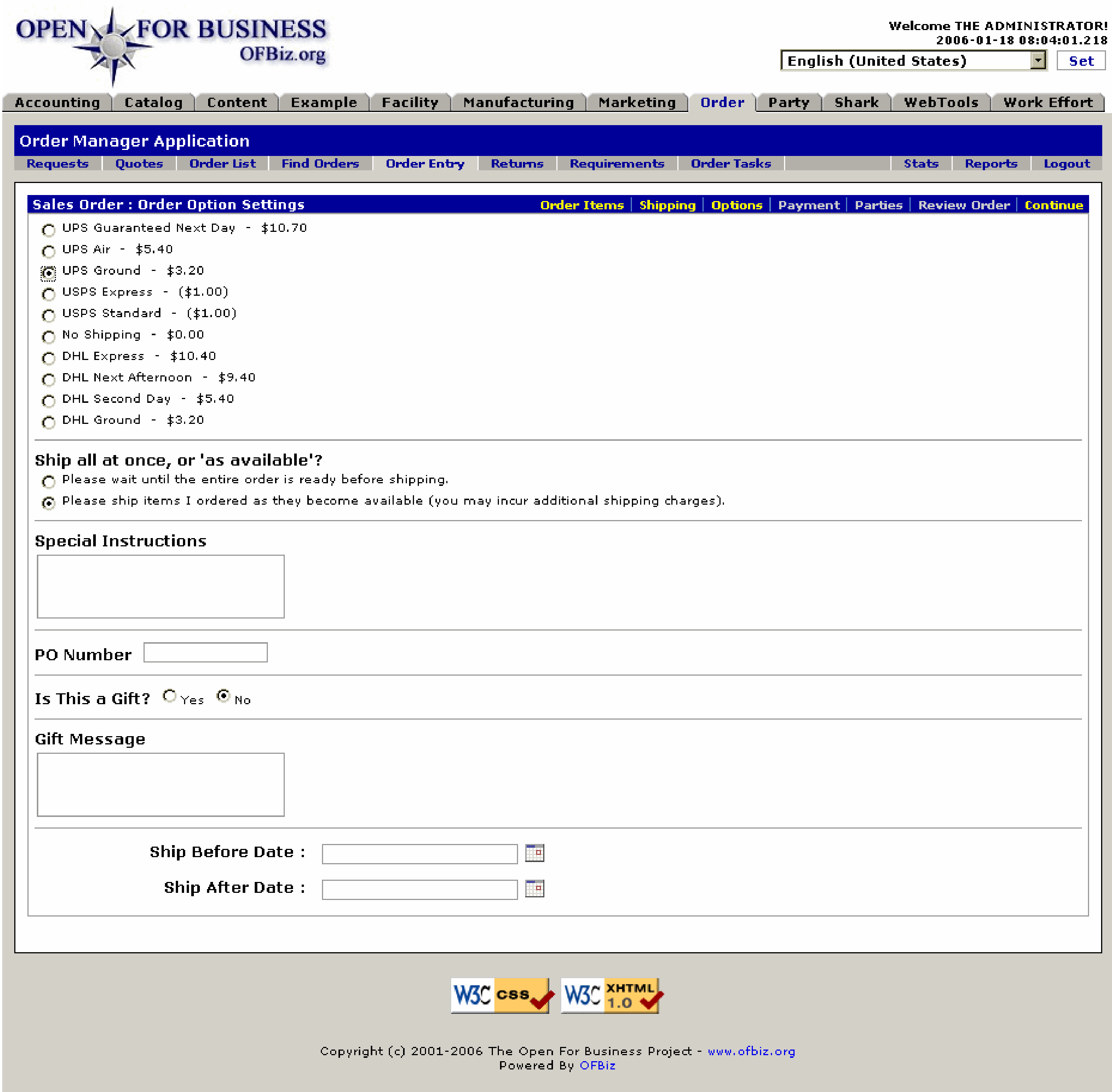
### .6.5.5 Continue

When satisfied with the ship-to address, click on the [Continue] link.

## .6.6 Continue with Order Option Settings

[Shipping] returns you to the preceding Shipping Address confirmation screen. [Items] returns you to the earlier Order Entry screen.

## .6.6.1 finalizeOrder-Sales2




This part of the Order Entry process confirms the shipping instructions and specifies the shipping carrier and rate desired.

## .6.6.2 link buttons

[Order Items] [Shipping] [Options] [Continue]

### .6.6.3 Shipping methods (Radio buttons)

Shipping options given here provide choices in method and cost.

NOTE: You must select at least one Radio Button in any section with buttons.

### .6.6.4 Partial shipment choice (Radio buttons)

'Ship all at once or as available?' You must select one of the buttons. The choice is between waiting for everything to be in hand before shipping, or to break the shipment into parts as items become available.

#### .6.6.4.1 'wait ... entire ...'

Make this selection when customer wants the total order to arrive in one shipment. If any single item is temporarily unavailable, the shipment will be held up until it can all be fulfilled.

#### .6.6.4.2 'as ... available'

This means that if an item is temporarily out of stock, ship all that is presently available, then ship out the remaining items as they become available.

### .6.6.5 Special Instructions

Enter any special shipping instructions here. For example, maybe the package should be left on the porch even if no one can sign for it. Or, if multiple recipients at the same address, instructions to pack each item in a separate package.

### .6.6.6 PO Number

This should NOT be populated or entered for a Sales Order unless a Purchase Order was received from an existing company.

### .6.6.7 Is This is Gift? (Radio buttons) (Y/N)

Select Yes or No with the radio button. This signals whether to include the following Gift Message and whether to gift wrap the item.

### .6.6.8 Gift Message

Enter the text desired by the ordering party to accompany this gift to the recipient. You might need to suggest contents to the customer, but be sure they agree with whatever will be entered here.

### .6.6.9 Ship Before or After dates

Using the popup calendars, select specified shipping dates where needed. For example, if the customer wants to wait for a special event, or if shipment must take place before an anticipated rate increase, use these fields to signal that information.

## .6.7 Continue with Order Entry Payment Settings

### .6.7.1 Continue with Order Entry Payment Settings

Must select one button before you can continue.

### .6.7.2 finalizeOrder-Sales3


Presentation depends upon methods established for the Party. Payment method confirmed here before continuing in the process.

### .6.7.3 link buttons

[Create New] [Update] [Order Items] [Shipping] [Options] [Payment] [Continue]

## .6.7.4 Link buttons discussed

1. [Create New] takes you to a screen where you choose what type of payment method you want to create new, for example a new credit card or a new EFT payment account. Select that and you are presented with a screen for completing the information for adding a new payment method to the Party.
2. [Update] opens a new browser in the Party Manager where you can make changes to the existing Credit Card, such as an expiration date or name on the card, etc.

## .6.7.5 Order Entry Payment Settings

Select one of the Radio Buttons below before proceeding with the Order Confirmation process. The buttons will reflect payment methods already established by the Customer. If no acceptable method is indicated, click on the [Create New] link; screens for capturing EFT or Credit Card information will be presented for completion.

### .6.7.5.1 Payment already received

If the order was prepaid, this indication should be here.

### .6.7.5.2 Offline: Check/Money Order

Generally means the Party has paid or will be billed with payment expected to come in the form of a check or money order.

### .6.7.5.3 CC: (type/number)

Refers to Credit Card, and presents the information already available in the Party Manager for the person placing the order. If this is the desired method of payment, click on the Radio Button.

### .6.7.5.4 EFT: (institution/account number)

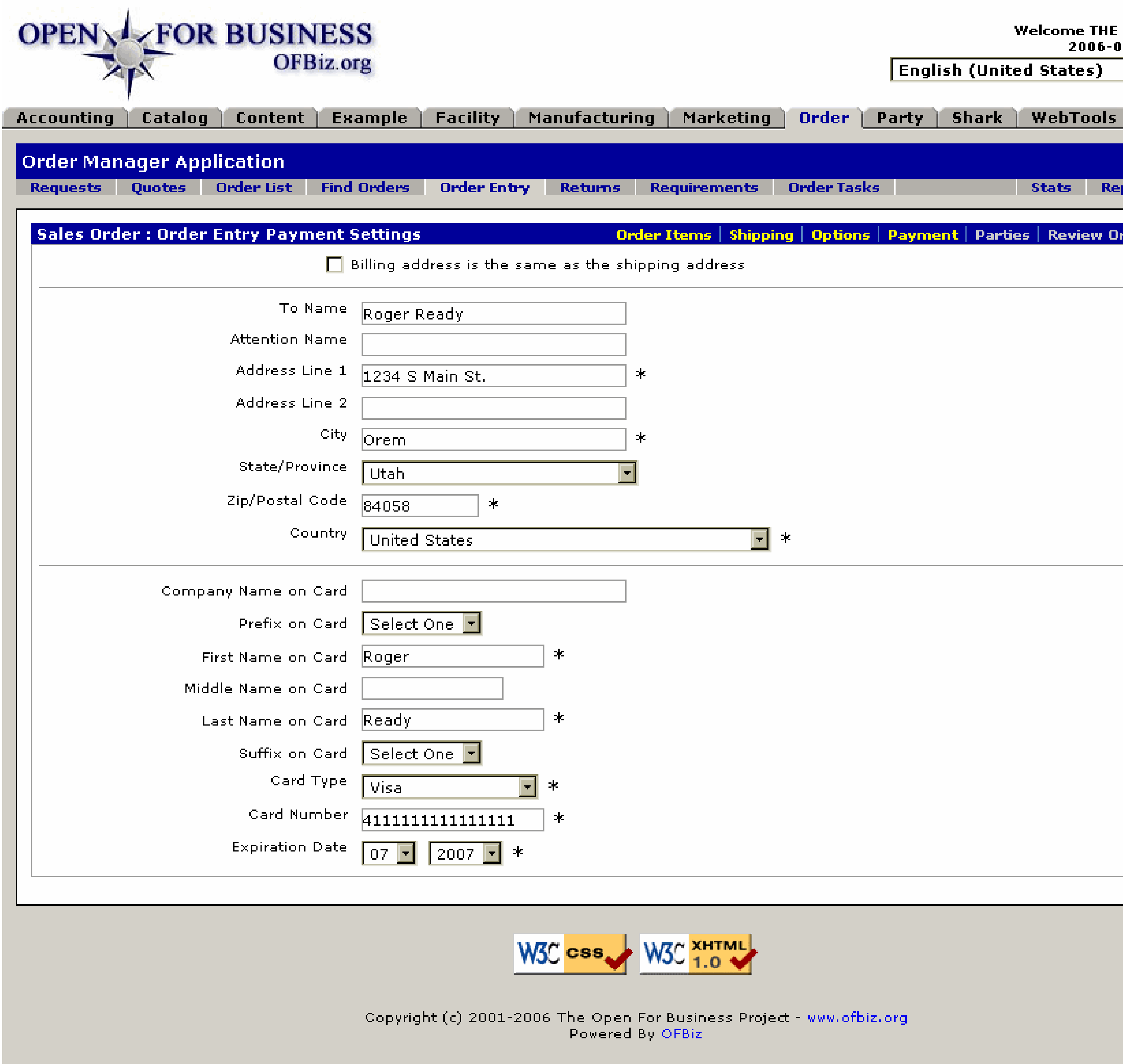
Refers to Electronic Funds Transfer from an existing financial account, and presents the information already available in the Party Manager for the person placing the order. If this is the desired method of payment, click on the Radio Button.

### .6.7.5.5 Gift Card or other means

Here could also be reference to an existing Gift Card, a Christmas Club savings account, or other means of funding the purchase. Whatever has been established within the Party Manager for this Party will be presented; use the radio button to select the preferred method.

## .6.7.6 Create new payment method

### .6.7.6.1 finalizeOrder-Sales3a




If you select a payment method not in the Party's records, a working screen for data entry appears.

## .6.7.6.2 Discussion

This screen will vary depending upon what payment method was selected in the previous screen. If you selected Credit Card and your card was already in the system, the screen would only have you confirm the information.

In this instance as shown, the customer selected Credit Card but his information had not yet been entered.

Therefore, this working screen is provided with which you can enter his information.

# .6.8 Association Confirmation

## .6.8.1 setAdditionalParty


If another Party is to be associated with this order, identify them in the process that starts with a button from this screen.

## .6.8.2 link buttons

[Order Items] [Shipping] [Options] [Payment] [Parties] [Continue]

## .6.8.3 Discussion

If the ordering party wishes to involve another party in this order for whatever reason, this is the screen where you begin that process. Select a radio button for Party or Party Group, then click on [Continue].

The default for almost every order will be to not add additional parties. Leave the default (bottom) button selected, press [Continue] and go on to the next screen.

If another Party or Group is to be brought in, the screens making that possible are very simple and self explanatory.

## .6.9 Continue final Order Confirmation

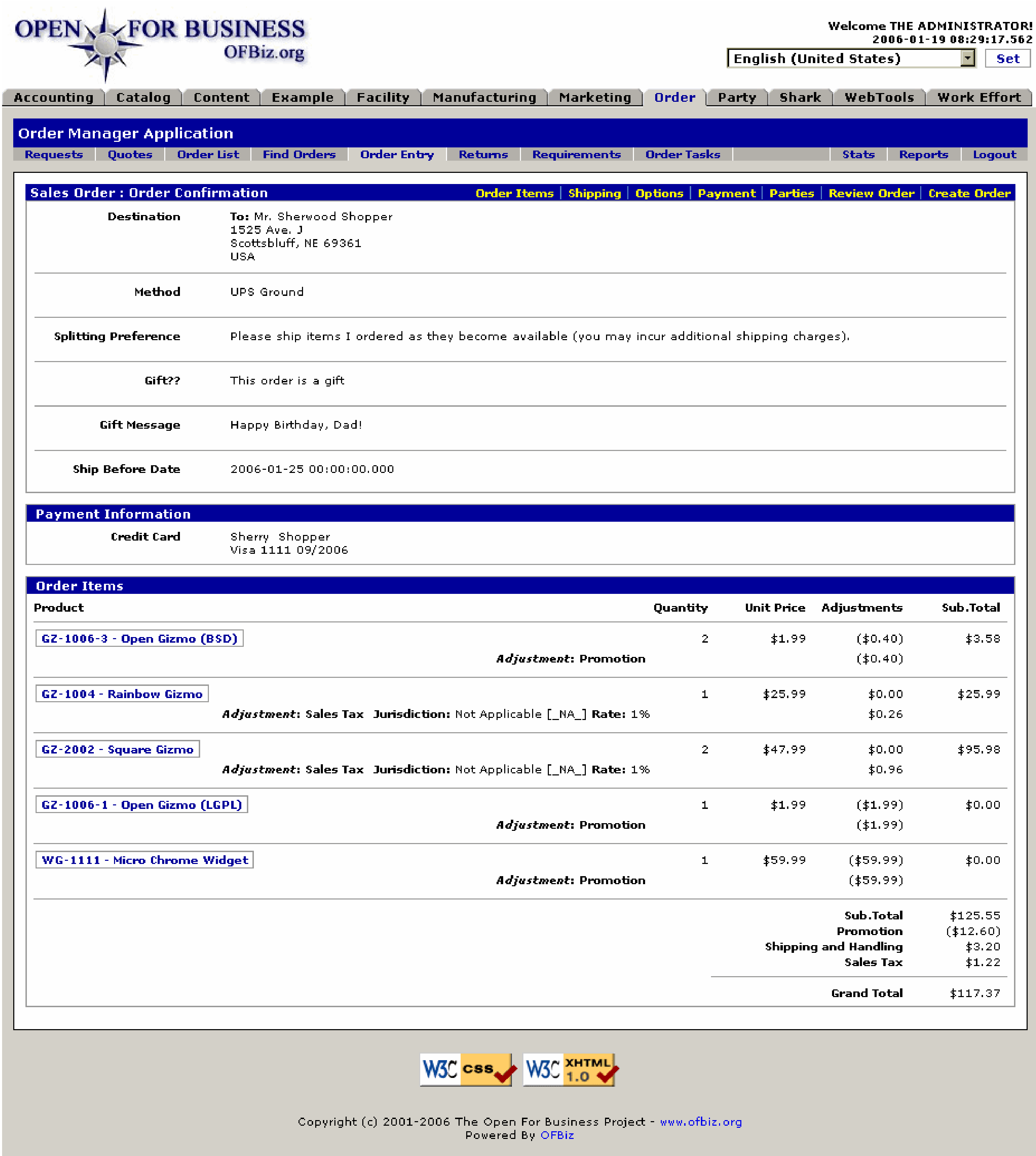
### .6.9.1 Discussion

This brings all the details together for one last confirmation before committing the order. If anything needs to be changed, click on the appropriate link button across the top to return to that part of the order process.

You will come to this screen whether you processed the normal method or used the Quick Finalize Order link.

Everything OK? Then click on [Create Order] to proceed. Do <U>not</U> click on [Create Order] until everything here is confirmed.

## .6.9.2 finalizeOrder-Sales4



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Welcome THE ADMINISTRATOR!
2006-01-19 08:29:17.562
English (United States) Set

Accounting | Catalog | Content | Example | Facility | Manufacturing | Marketing | Order | Party | Shark | WebTools | Work Effort

**Order Manager Application**

Requests | Quotes | Order List | Find Orders | Order Entry | Returns | Requirements | Order Tasks | Stats | Reports | Logout

**Sales Order : Order Confirmation** — Order Items | Shipping | Options | Payment | Parties | Review Order | Create Order

| | |
|---|---|
| **Destination** | **To:** Mr. Sherwood Shopper<br>1525 Ave. J<br>Scottsbluff, NE 69361<br>USA |
| **Method** | UPS Ground |
| **Splitting Preference** | Please ship items I ordered as they become available (you may incur additional shipping charges). |
| **Gift??** | This order is a gift |
| **Gift Message** | Happy Birthday, Dad! |
| **Ship Before Date** | 2006-01-25 00:00:00.000 |

**Payment Information**

| | |
|---|---|
| **Credit Card** | Sherry Shopper<br>Visa 1111 09/2006 |

**Order Items**

| Product | Quantity | Unit Price | Adjustments | Sub.Total |
|---|---|---|---|---|
| GZ-1006-3 - Open Gizmo (BSD) | 2 | $1.99 | ($0.40) | $3.58 |
| ***Adjustment*:** Promotion | | | ($0.40) | |
| GZ-1004 - Rainbow Gizmo | 1 | $25.99 | $0.00 | $25.99 |
| ***Adjustment*:** Sales Tax **Jurisdiction:** Not Applicable [_NA_] **Rate:** 1% | | | $0.26 | |
| GZ-2002 - Square Gizmo | 2 | $47.99 | $0.00 | $95.98 |
| ***Adjustment*:** Sales Tax **Jurisdiction:** Not Applicable [_NA_] **Rate:** 1% | | | $0.96 | |
| GZ-1006-1 - Open Gizmo (LGPL) | 1 | $1.99 | ($1.99) | $0.00 |
| ***Adjustment*:** Promotion | | | ($1.99) | |
| WG-1111 - Micro Chrome Widget | 1 | $59.99 | ($59.99) | $0.00 |
| ***Adjustment*:** Promotion | | | ($59.99) | |
| | | | **Sub.Total** | $125.55 |
| | | | **Promotion** | ($12.60) |
| | | | **Shipping and Handling** | $3.20 |
| | | | **Sales Tax** | $1.22 |
| | | | **Grand Total** | $117.37 |

W3C CSS W3C XHTML 1.0

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This is the final confirmation screen for the Sales Order Entry process, whether using Quick Finalize Order or the normal process.

### .6.9.3 link buttons

[Order Items] [Shipping] [Options] [Payment] [Parties] [Review Order] [Create Order]

### .6.9.4 Sales Order: Order Confirmation

Destination, shipping methods and other details of the process are given here. Each presentation depends upon the details of the order. You will likely find information about

- Destination (person and address)
- Method (carrier and whether express or normal)
- Splitting Preference (ship available or wait for all)
- Added Instructions
- Gift? and message
- Shipping before/after dates.

### .6.9.5 Payment Information

Presentation will vary; display depends upon the selected payment method.

### .6.9.6 Order Items

Here is the content of the Order itself. Click on the Order Items link to go back and make changes if needed. Return to this screen by clicking on the Finalize Order link from there.

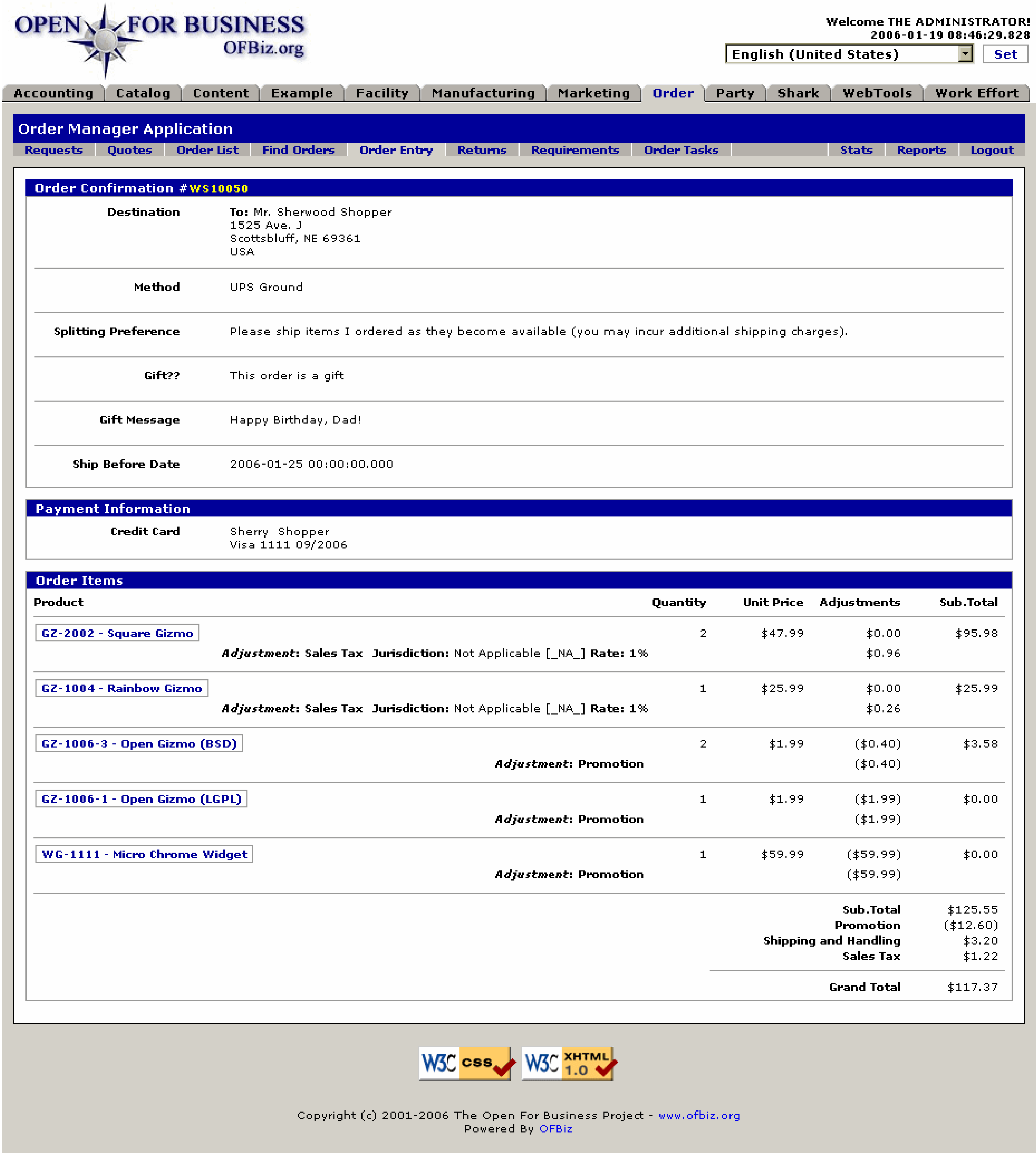
You can see that there are columns for the following information:

- Product
- Quantity
- Unit Price
- Adjustments
- Sub.Total

Then there is the financial section where the sub-totals are brought together, adjustments made, taxes applied, and shipping/handling charges added before the final total is stated.

## .6.10 Create Order to Process the Order

### .6.10.1 processorder-Sales




Note the absence of link buttons; the highlighted Order Confirmation #(WS10050) needs to be clicked before you can proceed.

### .6.10.2 link buttons

- No links except the Order Confirmation Number -

### .6.10.3 Discussion of Create Order

Basically another view of the Finalize Order >> Order Confirmation screen, above, except note the Order Confirmation # which now appears after the words 'Order Confirmation.' A click on that number takes you back to the Find Orders tab and presents details about this order.

By clicking on [Create Order], you initiate the internal processes within other parts of OFBiz to adjust inventory, create paperwork for processing the order through the warehouse, enter financial information, and setup details needed in the Facility Manager to prepare to complete the order.

Whenever an error occurs which can be handled within the system, a message appears across the top of the screen.

There are no other links in this screen except the Order Confirmation Number which may appear in a different color in the upper band across the screen. Click on that number to proceed to the next step.

## .6.11 View confirmed order

Info displayed dependent upon Status: Created, Approved, or Completed. As different parts of the order are shipped or fulfilled, those sections affected will change.

Note that not all links will appear all the time; displays are content driven.

### .6.11.1 orderview

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2006-01-19 09:09:18.531
English (United States) | Set

Accounting | Catalog | Content | Example | Facility | Manufacturing | Marketing | Order | Party | Shark | WebTools | Work Effort

## Order Manager Application

Requests | Quotes | Order List | Find Orders | Order Entry | Returns | Requirements | Order Tasks | Stats | Reports | Logout

### Order #WS10050 Information [ PDF ]

| | |
|---|---|
| Status History | Current Status: Approved<br>Approved - 2006-01-19 08:46:26.843<br>Created - 2006-01-19 08:46:16.609 |
| Date Ordered | 2006-01-19 08:46:16.609 |
| Currency | USD |
| Sales Channel | Web Channel |
| Product Store | 9000 |
| Origin Facility | N/A |
| Created by | admin |

### Payment Information

| | |
|---|---|
| Credit Card | Sherry Shopper<br>Visa 4111111111111111 09/2006 [Authorized]<br>[Authorize] [Capture] |
| | Authorize: 2006-01-19 08:46:26.437 $117.37<br>(**Ref:** 1137685586390 **AVS:** N/A **Score:** N/A) [Details] |
| | **To:** Sherry Shopper<br>1313 Ave. Z<br>Scottsbluff, NE 69361<br>USA |

### Contact Information

| | |
|---|---|
| Name | Mrs. Sherry Shopper ( 10011 ) ( Other Orders ) |
| Billing (AP) Address | **To:** Sherry Shopper<br>1313 Ave. Z<br>Scottsbluff, NE 69361<br>USA<br>(lookup:whitepages.com) |
| Order Notification Email Address | sherry@yahoo.com<br>( Send a confirmation email ) |
| Shipping Destination Address | **To:** Mr. Sherwood Shopper<br>1525 Ave. J<br>Scottsbluff, NE 69361<br>USA<br>(lookup:whitepages.com) |

### Shipment Information - 00001

| | |
|---|---|
| Address | 1525 Ave. J |
| Method | UPS Ground |
| Splitting Preference | Please ship items I ordered as they become available (you may incur additional shipping charges). |
| Gift?? | This order is a gift |
| Gift Message | Happy Birthday, Dad! |
| Ship Before Date | 2006-01-25 00:00:00.000 |
| | Quick-Ship Entire Order |
| | Pack Shipment For Ship Group [00001]<br>New Shipment For Ship Group [00001] |
| | View/Edit Delivery Schedule Info |

### Order Items

Edit Items

| Product | Status | Quantity | Unit / List | Adjustments | Sub.Total |
|---|---|---|---|---|---|
| GZ-2002 - Square Gizmo<br>Catalog \| Ecommerce<br>Inventory: ATP = 10, QOH = 12 | Current: Approved<br>2006-01-19 08:46:28.187 : Approved<br>2006-01-19 08:46:16.609 : Created | Ordered: 2<br>Cancelled: 0<br>Remaining: 2 | $47.99 / $48.00 | $0.00 | $95.98 |
| ***Adjustment*:** Sales Tax: (1% OFB _NA_ Tax) **Jurisdiction:** Not Applicable [_NA_] **Rate:** 1 | | | | $0.96 | |
| | ***Ship Group*:** [00001] 1525 Ave. J | 2 | | | |
| | ***Inventory*:** 10010 ***Ship Group*:** 00001 | 2 | | | |
| GZ-1004 - Rainbow Gizmo<br>Catalog \| Ecommerce<br>Inventory: ATP = -1, QOH = 0 | Current: Approved<br>2006-01-19 08:46:28.203 : Approved<br>2006-01-19 08:46:16.609 : Created | Ordered: 1<br>Cancelled: 0<br>Remaining: 1 | $25.99 / $0.00 | $0.00 | $25.99 |
| ***Adjustment*:** Sales Tax: (1% OFB _NA_ Tax) **Jurisdiction:** Not Applicable [_NA_] **Rate:** 1 | | | | $0.26 | |
| | ***Ship Group*:** [00001] 1525 Ave. J | 1 | | | |
| | ***Inventory*:** 10040 ***Ship Group*:** 00001 | 1 | [1 Backordered] | | |
| GZ-1006-3 - Open Gizmo (BSD)<br>Catalog \| Ecommerce<br>Inventory: ATP = 6, QOH = 8 | Current: Approved<br>2006-01-19 08:46:28.203 : Approved<br>2006-01-19 08:46:16.609 : Created | Ordered: 2<br>Cancelled: 0<br>Remaining: 2 | $1.99 / $5.99 | ($0.40) | $3.58 |
| ***Adjustment*:** Promotion: Test Percent off product set | | | | ($0.40) | |
| | ***Ship Group*:** [00001] 1525 Ave. J | 2 | | | |
| | ***Inventory*:** 9023 ***Ship Group*:** 00001 | 2 | | | |
| GZ-1006-1 - Open Gizmo (LGPL)<br>Catalog \| Ecommerce<br>Inventory: ATP = 6, QOH = 7 | Current: Approved<br>2006-01-19 08:46:28.203 : Approved<br>2006-01-19 08:46:16.609 : Created | Ordered: 1<br>Cancelled: 0<br>Remaining: 1 | $1.99 / $5.99 | ($1.99) | $0.00 |
| ***Adjustment*:** Promotion: Test Gift with Amount of Specific Product | | | | ($1.99) | |
| | ***Ship Group*:** [00001] 1525 Ave. J | 1 | | | |
| | ***Inventory*:** 9021 ***Ship Group*:** 00001 | 1 | | | |
| WG-1111 - Micro Chrome Widget<br>Catalog \| Ecommerce<br>Inventory: ATP = 50, QOH = 52 | Current: Approved<br>2006-01-19 08:46:28.203 : Approved<br>2006-01-19 08:46:16.609 : Created | Ordered: 1<br>Cancelled: 0<br>Remaining: 1 | $59.99 / $60.00 | ($59.99) | $0.00 |
| ***Adjustment*:** Promotion: Test Promo 1 | | | | ($59.99) | |
| | ***Ship Group*:** [00001] 1525 Ave. J | 1 | | | |
| | ***Inventory*:** 9005 ***Ship Group*:** 00001 | 1 | | | |

## .6.11.2 link buttons

[Other Orders] [lookup:whitepages.com][Send a confirmation email] [Allow Split] [Authorize] [Capture] [Details] [Inventory] [New Shipment for Ship Group Nnnnnn] [Pack Shipment for Ship Group Nnnnnn] [Quick Ship Entire Order] [View / Edit Delivery Schedule Info] [Catalog] [Ecommerce] [Receive Payment] [PDF] [Create New] [Edit Items]

## .6.11.3 Approve Order link

You might notice the link button [Approve Order] on the screen under View order in the upper LH corner of the 'Order Information' section. That approval action might be needed to process the order through the system, especially if it is to be paid after delivery, by check, or 'Paid Offline' for whatever reason. By clicking upon that link, you initiate the approval and processing actions.

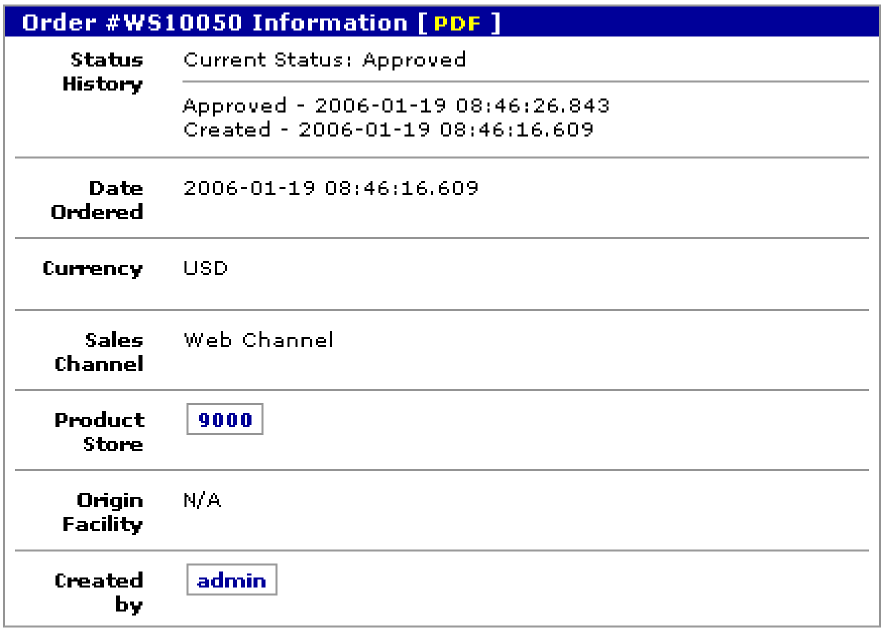
Once 'Approved' by you, the display changes to show an updated Status going from 'Created' to 'Approved' along with the date and time of the actions. This is shown in the partial view of the same order presented below under changeOrderItemStatus.

Other parties elsewhere in the application can also perform the approval process as well as Cancel, Complete, or Ship the order.

The Approval process is only discussed here as part of the View Orders process because of the occasional appearance of the [Approve Order] link on this particular screen.

## .6.11.4 Order # Information

### .6.11.4.1 changeOrderItemStatus




This section indicates the Status History and other facts.

### .6.11.4.2 PDF

Click on the highlighted PDF button and you will generate a PDF copy of this screen which can be printed and/or distributed to the customer and wherever needed in the company.

### .6.11.4.3 Status History

Provides dates and times of order creation, approval, etc.

These statuses are only for the order. The status of shipments and payments associated with the order are tracked independently. Note that to achieve Completed

status, you must have the completion of all shipments and receipt of all payments.

### .6.11.4.4 Date Ordered

When the original order was placed.

### .6.11.4.5 Currency

Which national currency is being used to pay for this order.

### .6.11.4.6 Sales Channel

Did the order come in through ecommerce, an email, by phone, by snail mail, etc.

### .6.11.4.7 Product Store

Click on the Product Store ID and another browser pops up in the Catalog Manager, Stores tab, Store sub-tab where you can view or make changes to the Store information.

### .6.11.4.8 Origin Facility

If the order came in from another company (drop-ship, fulfillment house, another branch passing through the order, etc.), it will be given here.

### .6.11.4.9 Created By

Click on the UserID here and another browser pops up in the Party Manager with the profile screen for the Party that created the order. If the order was created in ecommerce, this would be the ordering party, otherwise it is the party that entered the order.

## .6.11.5 Payment Information

### .6.11.5.1 Online Payment

Shows status of payments by Credit Card, EFT, PayPal, or whatever method of payment was authorized. Multiple payment methods are allowed.

#### .6.11.5.1.1 Credit Card Authorized

When taking the order, you will probably want to Authorize the use of the Credit Card before fulfilling the order.

That is done automatically by the system here, as you can see by the status of [Authorized] shown within brackets but not active as a link, directly underneath the card number. Further status is given with the next section labeled 'Authorize' which gives some of the authorization details.

For those times when you need to manually authorize the Credit Card, click on the link [Authorize]. This will take you to the Accounting Manager in a separate browser or another tab, and you will see the screen shown below under Authorize.

After the order has been processed and either shipped or ready to ship, you may want to Capture the payment. For that purpose, click on the link [Capture] and you are taken to the Accounting Manager > Transactions tab and the screen shown below under Capture.

To see the details of a transaction, click on the [Details] link associated with it. The details of the Authorize transaction are shown below.

### .6.11.5.1.1.1 Authorize


When you click on [Capture], this screen under the Accounting Manager is presented.

## .6.11.5.1.1.2 Capture


When you click on [Capture], this screen under the Accounting Manager is presented.

### .6.11.5.1.1.3 Details


When you ask for [Details] of a transaction or press the [Gateway Responses] link, this Accounting Manager screen is shown.

## .6.11.5.1.2 Other payment methods

EFT transactions follow a path similar to that described above. Other methods, such as PayPal, WorldPay, purchase order payments, etc., each have their own similar process within this section of the Order screen, as needed.

## .6.11.5.2 Offline Payment

If payment is to be made offline, a link will appear to take you to the Receive Payment screen, shown below. If the order has been shipped but is not yet paid for, a colored link [Receive Payment] may appear in this Payments section. When clicked upon, this provides a working screen as shown below where payments can be documented for receipt against the Invoice. Once entered, the payments will appear in the Accounting Manager under the Payments tab.

### .6.11.5.2.1 receivePayment


Receiving an Offline Payment brings up this working screen. Enter amounts with currency signs.

### .6.11.5.2.2 link buttons

[Go Back] [Save]

## .6.11.5.3 Invoices #

If an Invoice has been generated against this order, the Invoices # Link takes you to the Invoice view.

## .6.11.6 Contact Information

All contact information associated with the order is listed here. Each item shows how it is related to the order; for example: billing address, shipping address, billing phone number, primary email address, etc.

Not everything listed here will appear on every order.

### .6.11.6.1 Name

Click on the link to the Party ID in the Party Manager.

### .6.11.6.2 Billing (AP) Address

The person placing the order (Contact Name) might be different from the Billing Party, or the Billing Address could be different from both the placing party and the ship-to party. The Billing Address, however, should correspond with the address known for the Credit Card owner by the financial institution.

Includes a lookup link to [lookup:whitepages.com] if you want a confirmation of the party.

### .6.11.6.3 Order Notification Email Address

If your system has been setup, click on the link [Send a confirmation email] and it will generate a new message form to send email. Even better, your system can automatically transmit (auto-transponder) an email notification to this address with the order confirmation number and other relevant details upon Approval of the order.

### .6.11.6.4 Shipping Destination Address

Has a white-pages lookup link for [lookup:whitepages.com].

## .6.11.7 Shipment Information

### .6.11.7.1 Note on multiple ship-to orders

Shipments to multiple recipients are divided into groups at the time the order is created. Each Group is listed in a separate section of this Order View.

### .6.11.7.2 Address

Just enough of the address is given to confirm this item.

### .6.11.7.3 Method

The shipping method (UPS, FedEx, USPS, etc., together with the priority level) as requested by the ordering party or defaulted by the system.

### .6.11.7.4 Splitting Preference

Whether the customer wants the entire order shipped together after all items are available, or to ship in partial completions as items become available. If the choice was to Wait Until, a link is provided to quickly re-visit that decision upon contact with the ordering Party. Click on the link and the preference is changed to As Available.

There is no option for going back, however.

### .6.11.7.5 Gift?

Flags the request for gift wrapping or accompanying message if this is ordered as a gift.

### .6.11.7.6 Shipment

This field only appears after the Shipment has been created. It includes the Shipment ID which can be clicked as a link to review the Shipping document.

Click on the <U>Packing Slip</U> link to create a PDF version of the Packing Slip which can be sent or emailed to the customer or for wherever a hardcopy of the Packing Slip might be needed.

### .6.11.7.7 Message links - status dependent

## .6.11.7.7.1 Quick-Ship Entire Order link

For expedited processing of the order through the system, this link can by-pass the manual procedure screens for picking, packing, etc., and prepare the paperwork to get the order out the door fastest.

##### .6.11.7.7.2 Pack Shipment For Ship Group ... link

Takes you to the Facility Manager to begin the process of preparing the items for shipment.

##### .6.11.7.7.3 New Shipment For Ship Group ... link

After the original shipment preparation has begun for this Ship Group, if new items need to be added, this is the link to invoke.

##### .6.11.7.7.4 View/Edit Delivery Schedule Info link

After the processing as advanced far enough to have generated a Shipment Plan, the delivery schedule can be seen and updated from this linked screen.

##### .6.11.7.7.5 Quick-Refund Entire Order link

After the order has been shipped, this link will appear in the same area instead of those discussed above. The Shipments field (above) will also appear. If the customer wishes to return the entire order, this link will begin the Returns process for every item.

##### .6.11.7.7.6 <Create Return link

After the order has been shipped, you can pull up this order screen and review the order while consulting with a customer about a possible Return. If the Return appears warranted, click on this link to initiate the Return process, discussed below.

### .6.11.8 Order Items

#### .6.11.8.1 Product

##### .6.11.8.1.1 Catalog link

Takes you to the main Product page for this item in the Catalog Manager in a seperate browser window.

##### .6.11.8.1.2 Ecommerce link

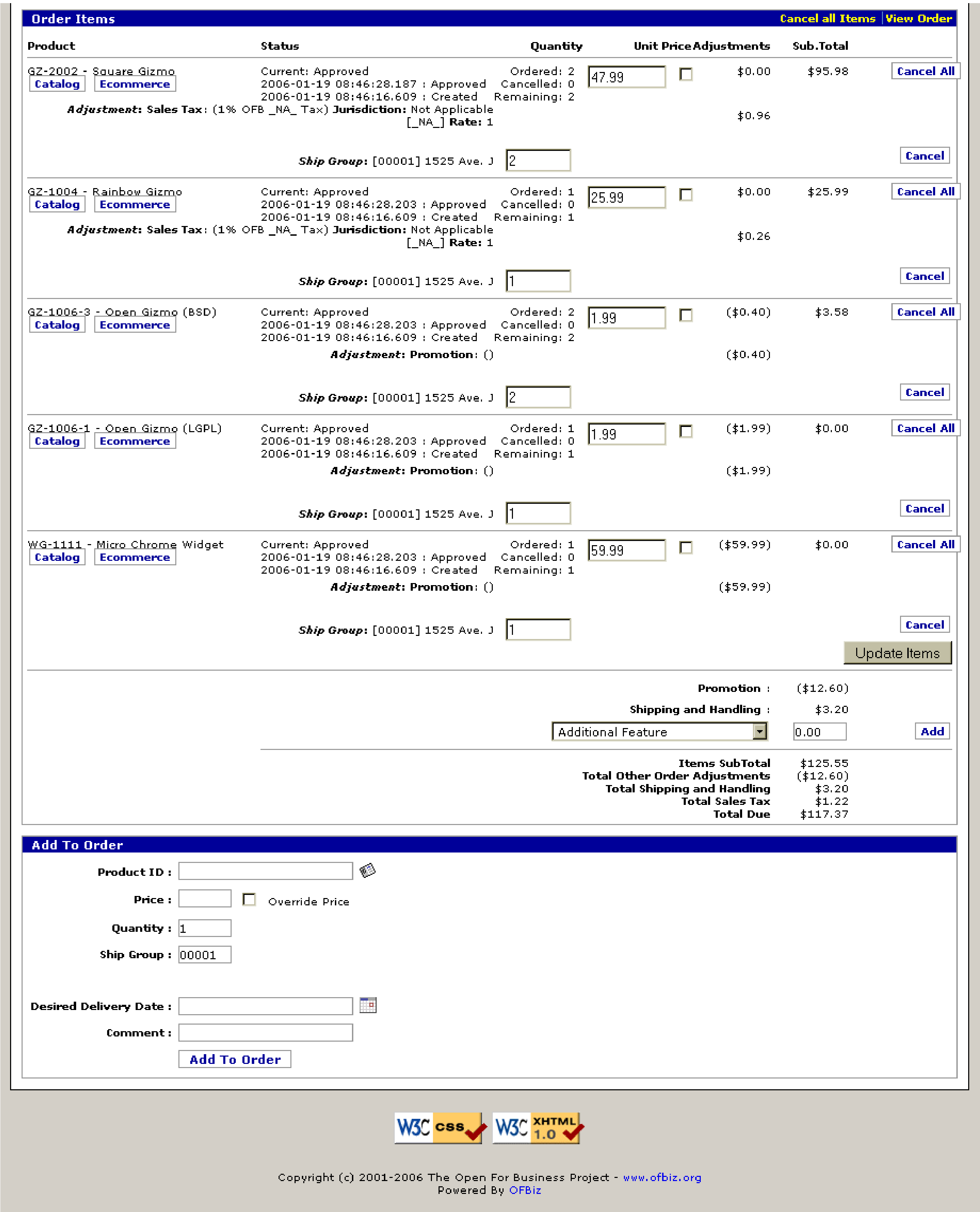
Click on the Ecommerce link to see this Product as displayed in the Ecommerce application. It will appear in a seperate popup browser window.

### .6.11.8.1.3 Inventory link

Takes you to the Catalog manager, main Product tab, Inventory sub tab for this product in another popup browser window.

## .6.11.8.2 Edit Items link

### .6.11.8.2.1 EditItems




When you view the Order from the Edit Items screen, many more options open up to adjust or add to the Order.

#### .6.11.8.2.2 link buttons

[Cancel] [Cancel All] [Add] [Catalog] [Ecommerce] [Update Items] [Add To Order] [Cancel all Items] [View Order]

#### .6.11.8.2.3 Discussion

When you click on the Edit Items screen, it presents opportunities to make changes to the original order. Here you can cancel items, change the quantity, introduce additional price adjustments, and (with the Add To Order section), place more items into the order.

Each item is seperated from the others by a horizontal line. If you click [Cancel All], it will delete those checked items in any section. If you click [Cancel], it will delete only the checked item. If you click on the highlighted [Cancel All Items] link, all will be removed. You could then maintain the order by adding other items from the Add To Order section.

At the bottom of the screen is a new section for adding items to the order.

### .6.11.8.3 Status - with links

Click on the Catalog link to see the item's catalog screen. Click on the Ecommerce link to see the presentation of this product in the Ecommerce application.

Click on the Inventory Item number and you are taken (in the same window) to the Facility Manager > Facilities tab > Inventory Items sub-tab with full details about the Inventory Item.

### .6.11.8.4 Quantity from various perspectives

The Quantity is displayed from many different perspectives, among them:

- Ordered: 1
- Cancelled: 0
- Remaining: 1
- Shortfalled: 0
- Ship Request: 0
- Qty Shipped: 1
- Outstanding: 0
- Invoiced: 1
- Returned: 0

If there is any circumstance needing attention, that item is highlighted. This would include Shortfalls, Outstanding items, Returns, etc.

### .6.11.8.5 Unit / List price

What the order was sold for and the List Price for the item.

### .6.11.8.6 Adjustments

Adjustments to the price in this order for discounts, promotions, etc.

### .6.11.8.7 Sub Total

Quantity shipped times the sales prices less adjustments.

### .6.11.8.8 Adjustments: Additional Feature

In this section, totals for Promotions and amounts for other adjustments are shown. In the Edit Item view, any additional adjustments can be posted using the drop-down box. Place a minus sign [-] before the number for reductions. Options might include:

- Discount
- Fee
- Miscellaneous Charges
- Promotion
- Replacement
- Sales Tax
- Shipping and Handling
- Surcharge
- Warranty

## .6.11.9 Notes - Create New

### .6.11.9.1 CreateNewNote


This Note will stay with the Order. If "No" is selected, it will also appear on the printed documents to the customer.

### .6.11.9.2 link buttons

[Go Back] [Save]

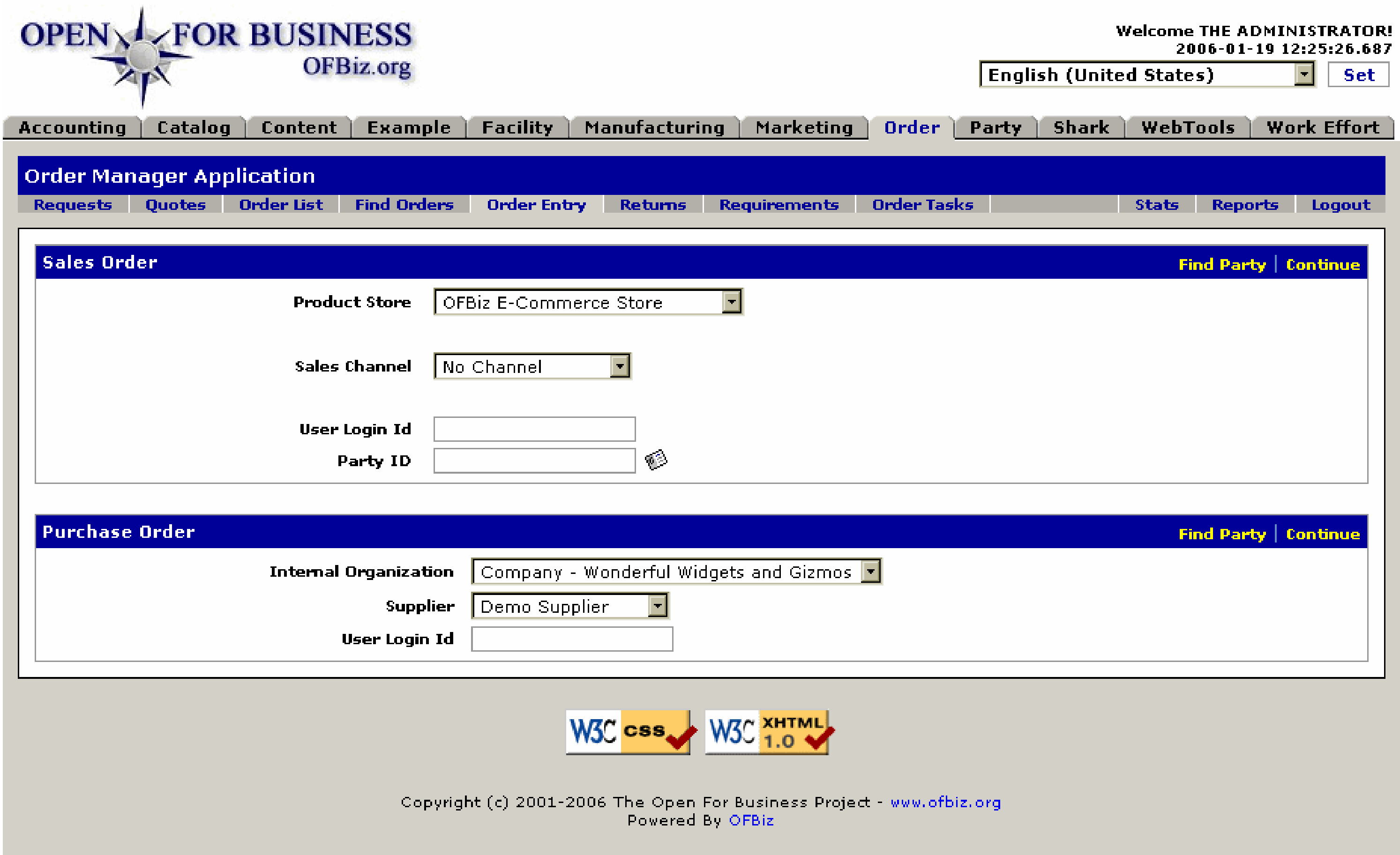
# .7 Order Entry - Purchase Order

## .7.1 Purchase Order - discussion

The Purchase Order process is used to order items from suppliers for use or resale by your company. Use only the lower portion of the first screen to identify your supplier and begin your Purchase Order.

NOTE: If you find yourself stuck at the Purchase Order screen and wish to return to the following screen to select a different vendor or to enter a Sales Order, click on the [Clear Order] button to return here.

## .7.2 orderentry-PO



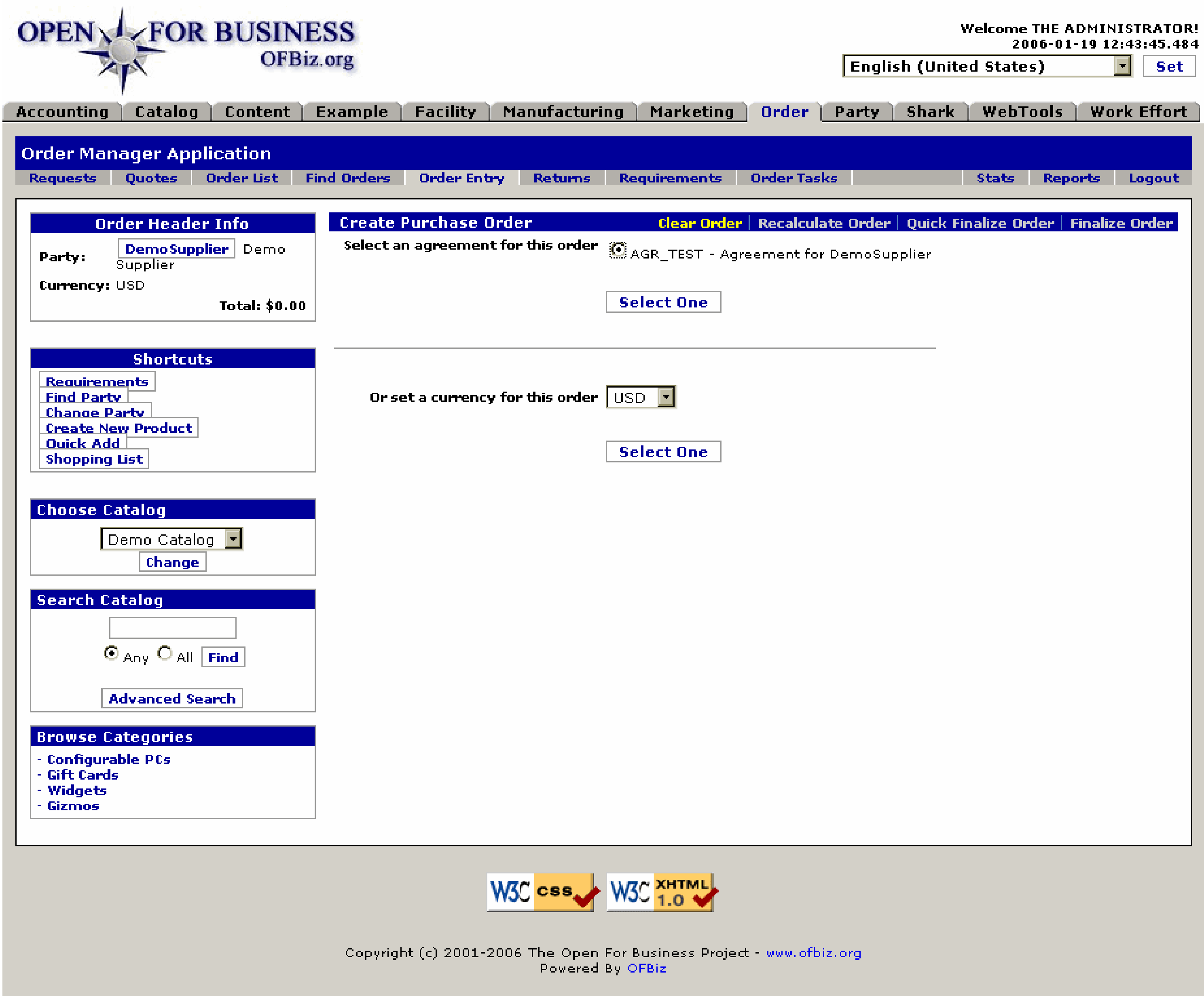

Work in the Purchase Order (lower) section of this screen to identify the supplier and yourself; press [Continue] when ready.

## .7.3 link buttons

[FindParty] [Continue]

## .7.4 Create Purchase Order - 1

### .7.4.1 initorderentry




This screen asks for a choice of Agreements OR a choice of currency. Many other links are also provided.

### .7.4.2 link buttons

[Requirements] [FindParty] [ChangeParty] [Create New Product] [Quick Add] [Shopping List] [Change] [Find] [Advanced Search] [Select One] [Clear Order]

### .7.4.3 Create Purchase Order (screen 1)

In this instance, you are asked to set a different currency or, if agreements are in place with the supplier, to use a bullet to identify the applicable agreement. Click on the [Select One] link associated with your choice to continue.

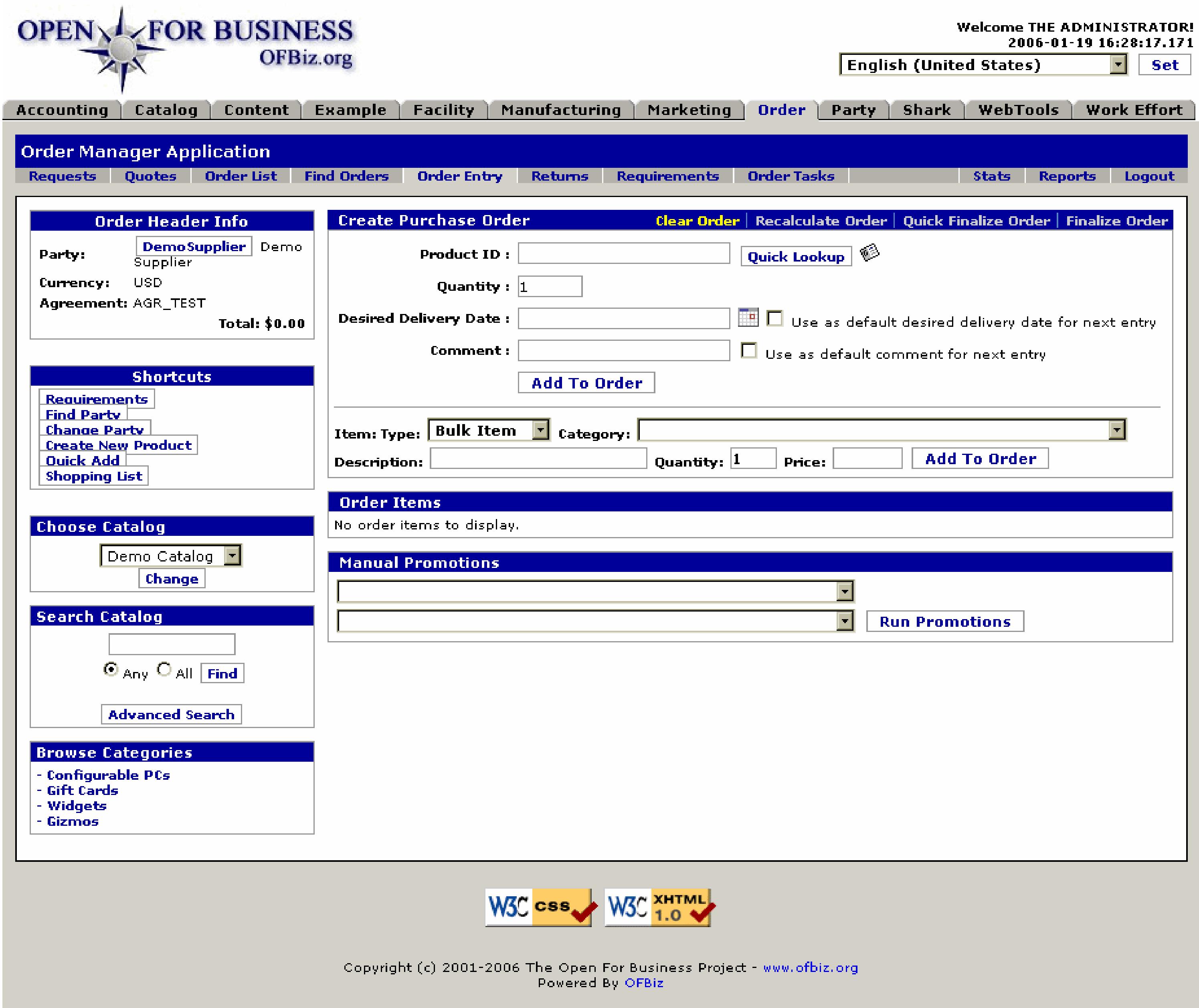
## .7.5 Create Purchase Order - 2

## .7.5.1 Discussion

From here you still have the same options available along the left-hand column. Note that the Agreement Name has been added to the Order Header Info section.

To create the order, select order items and they will be populated into the fields. Indicate quantity, desired delivery date, and enter any comments you wish.

## .7.5.2 setOrderAgreement



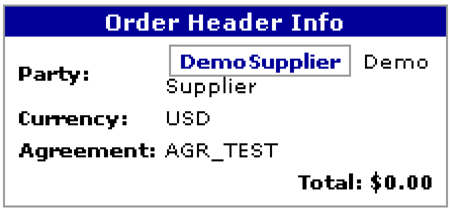

Begin to enter your order items from this screen. Many links and tools here help identify products or prepare your order.

## .7.5.3 link buttons

[Requirements] [FindParty] [ChangeParty] [Create New Product] [Quick Add] [Shopping List] [Change] [Find] [Advanced Search] [Quick Lookup] [Add To Order] [Clear Order]

# .7.5.4 Order Header Info

## .7.5.4.1 OrderHeader




Total will reflect the value of the order.

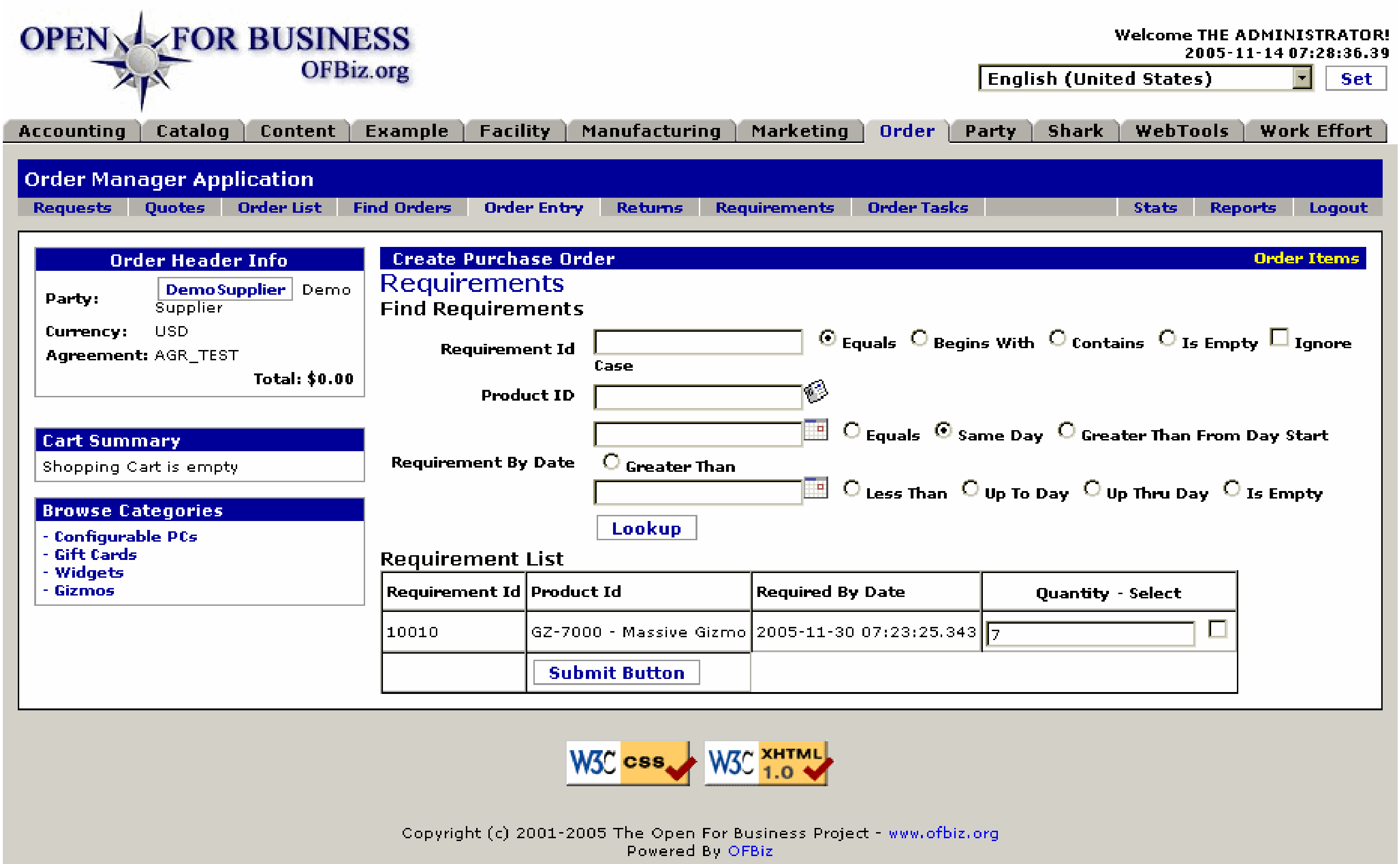
## .7.5.4.2 Discussion

Identifies the Party, the Currency, the applicable Agreement and the order Total. The Total will reflect items ordered but may not include tax, shipping or discounts. Click on the Party ID to view more information about the Party to which you are placing the order.

## .7.5.5 Shortcuts

### .7.5.5.1 Requirements

#### .7.5.5.1.1 RequirementsForSupplier



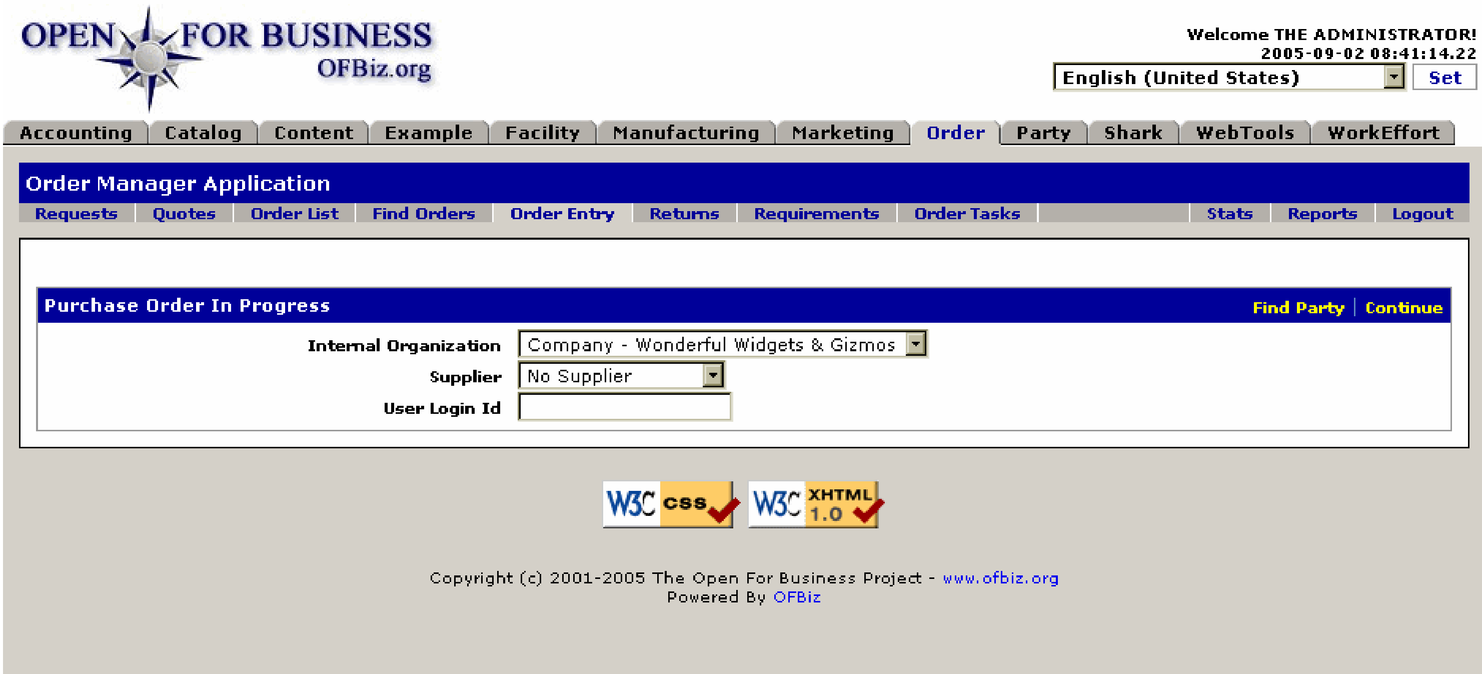

If Requirements have been created for products from this Supplier, they can be identified from this screen.

### .7.5.5.2 Find Party

Takes you to the Party Manager -> Find Party screen.

## .7.5.5.3 Change Party

### .7.5.5.3.1 checkinits-PO




If you suddenly realize you are working with the wrong Supplier, come here to change.

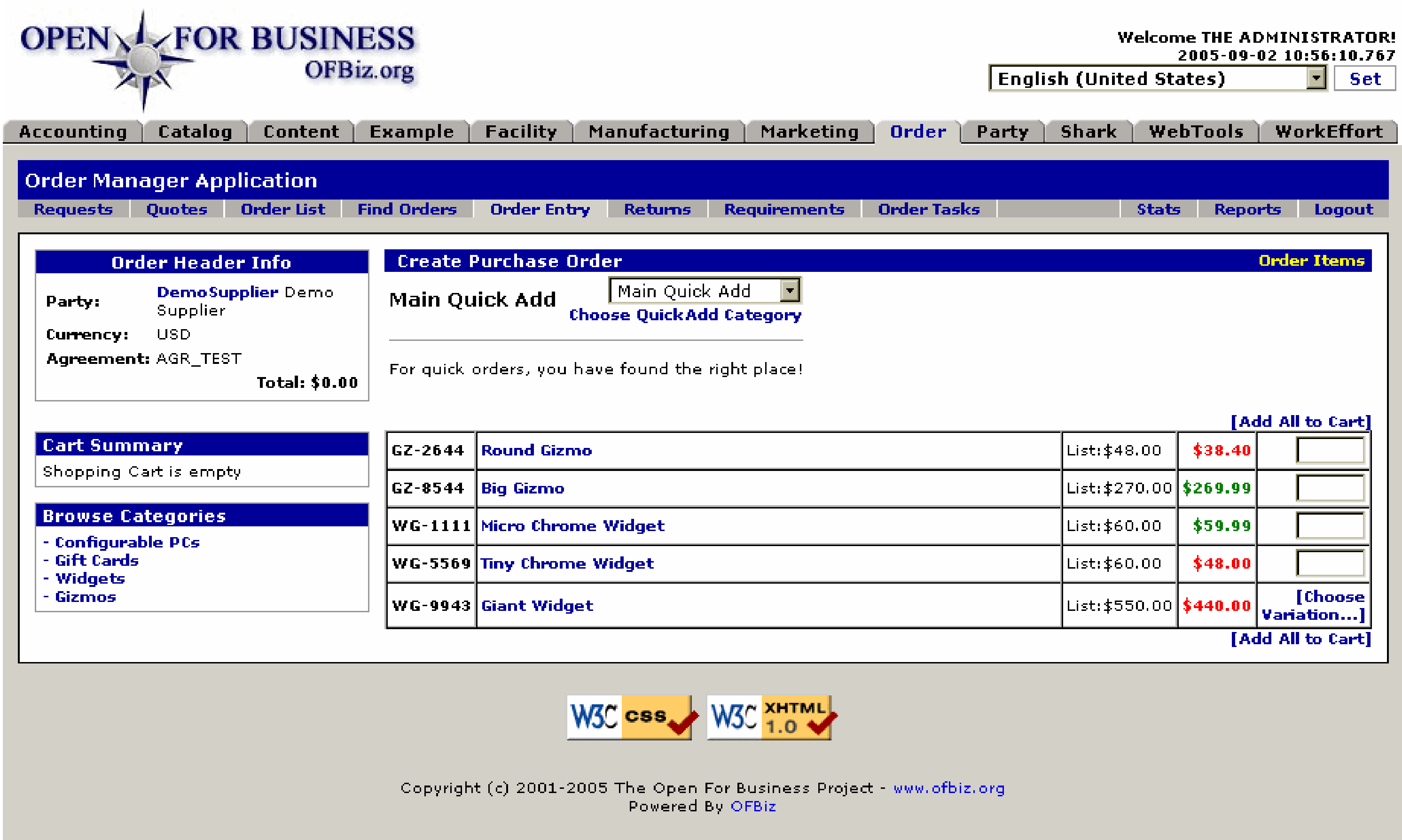
## .7.5.5.4 Create New Product

While talking with your Supplier, you learn of a new product that you just have to have! Click on the Create New Product link from your PO order entry screen and you are taken directly to the Catalog Manager -> EditProduct screen. There you can create the product so it can be identified for ordering from your Supplier.

When finished, click on the Order Manager -> Order Entry screen; you are returned to your incomplete Purchase Order.

## .7.5.5.5 Quick Add

### .7.5.5.5.1 quickadd-PO



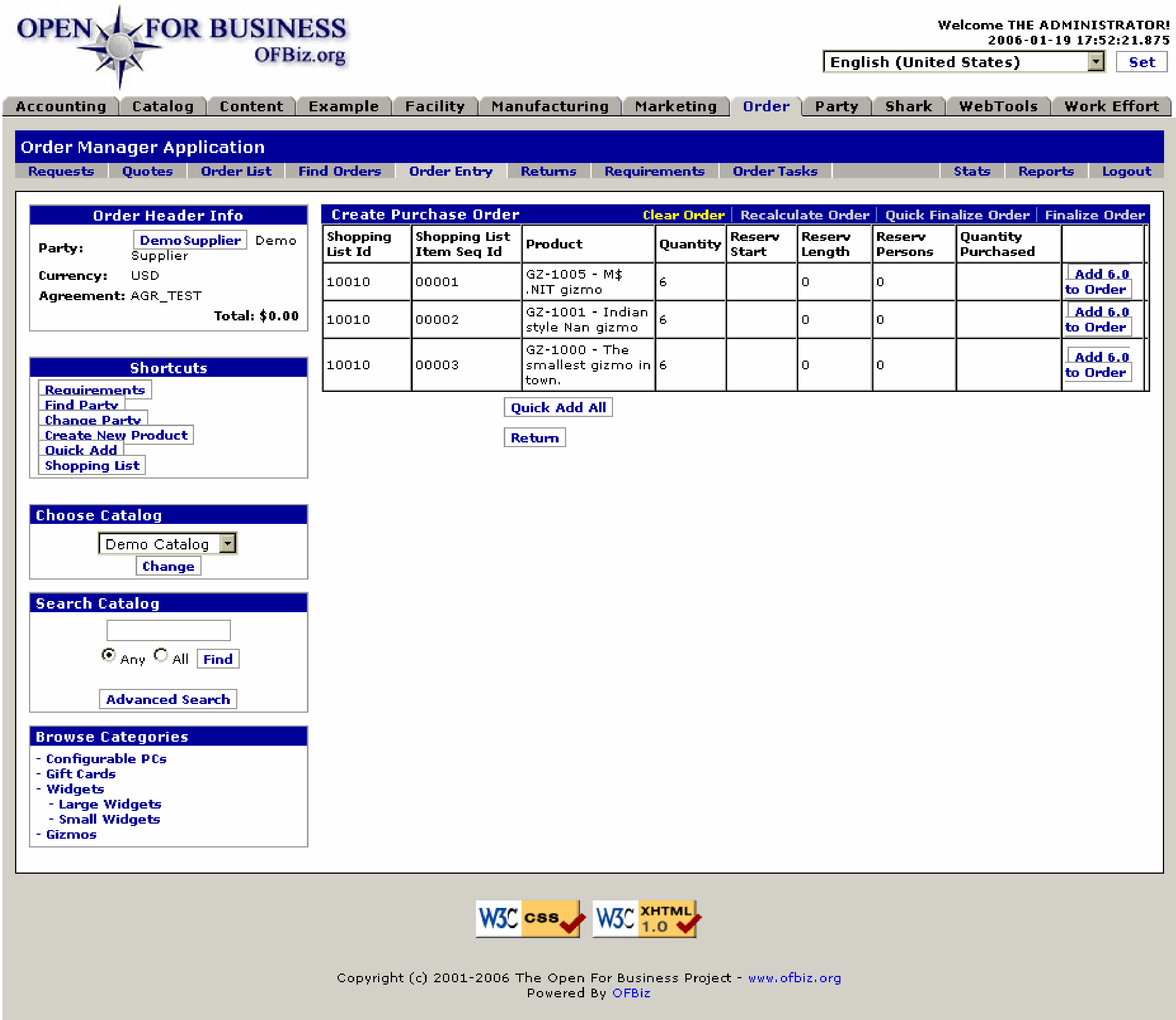

From Category Catalogs you have assembled, a Vendor's items can be quickly presented here for adding to your order.

### .7.5.5.5.2 link buttons

[Choose QuickAdd Category] [Choose] [Add All to Cart] [Variation...]

## .7.5.5.6 Shopping List

### .7.5.5.6.1 addFromShoppingList-PO




After you have identified which shopping list you want to use, it is presented here for your selections.

### .7.5.5.6.2 link buttons

[Add 1 To Order] [Quick Add All] [Return]

### .7.5.5.6.3 Discussion

During the order process, you have the opportunity to create or edit a Shopping List. These can be especially convenient in the Purchase Order process because you can tailor the Shopping List to the Vendor and then pull up that list whenever ordering something from them. Some Vendors might provide so many different items that you will want to have lists by categories or type of products.

This [Shopping List] link is where you pull up a list of all your lists and then select which one you want. The screen shown above is given after you have chosen your List.

Click on [Return] to go back to the PO Items screen.

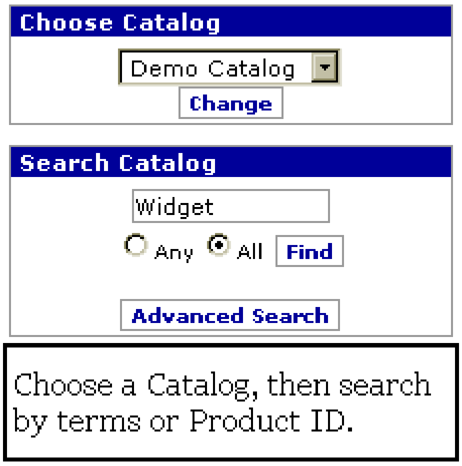
## .7.5.6 Choose Catalog

### .7.5.6.1 Catalog (drop-down box)

Choose your supplier's catalog from the drop-down box and click on [Change].

## .7.5.7 Search Catalog

### .7.5.7.1 CatalogSearch




### .7.5.7.2 link buttons

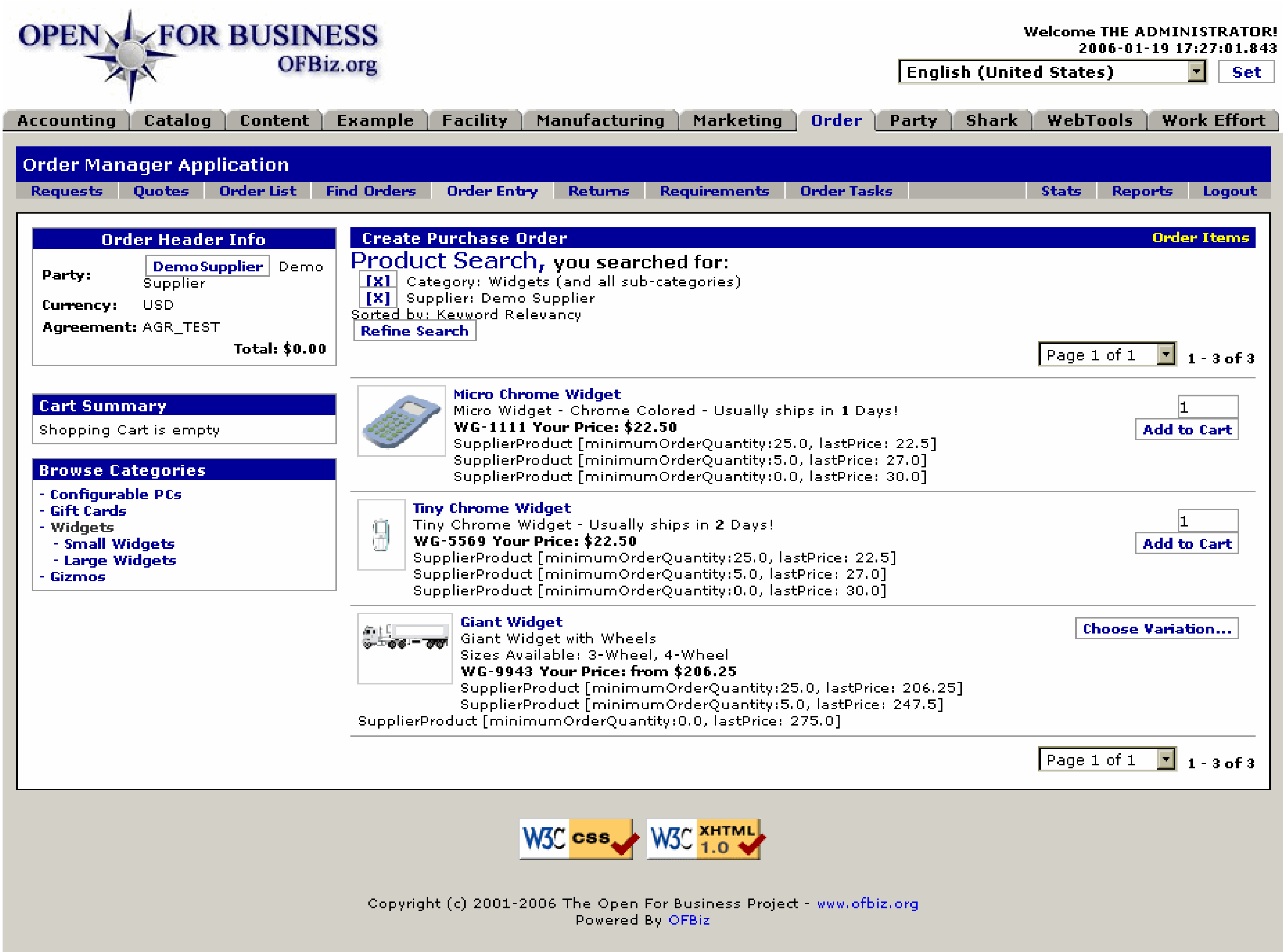
[Change] [Find] [Advanced Search]

### .7.5.7.3 Discussion

Based upon the Catalog chosen above, enter a term (such as Widgets, or Purple, or Massive). Then select a radio button to return Any or All hits for the search term. When you click on [Find], a screen with the results will be presented. Use [Advance Search] to reduce the search if too many hits are returned.

## .7.5.8 Browse Categories

### .7.5.8.1 BrowseCategories




Browsing the larger category of Widgets brought up this screen. Add to cart, then return to Order Items.

### .7.5.8.2 link buttons

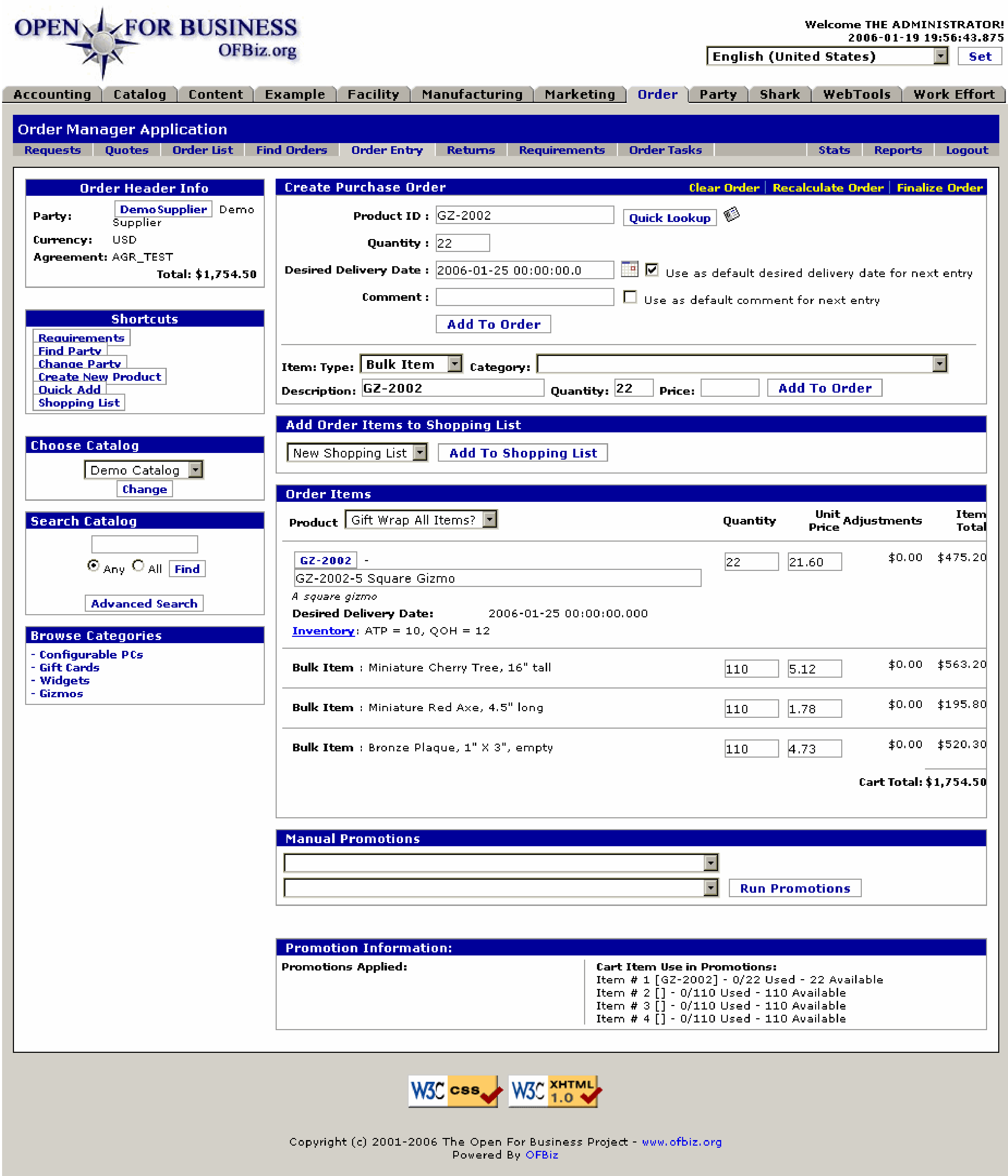
[Add to Cart] [Choose Variations] [Order Items]

### .7.5.8.3 Discussion

To be taken to this screen of products within categories, click on a selected category and you have what is shown above. Click on [Order Items] to return to the main screen.

### .7.6 Create Purchase Order - 3

#### .7.6.1 additem




A mix of stock replenishment and components to manufacture a custom order for 110 WashingtonWidgets is shown.

## .7.6.2 link button

[Requirements] [FindParty] [ChangeParty] [Create New Product] [Quick Add] [Shopping List] [Change] [Find] [Advanced Search] [Quick Lookup] [Add to Order] [Add To Shopping List] [Run Promotions] [Clear Order] [Recalculate Order] [Finalize Order]

## .7.6.3 Create Purchase Order - Screen 2

### .7.6.3.1 Discussion

Adds details in the Order Items section to the items already selected and brings out the processing link buttons to [Recalculate Order] and [Finalize Order]. The screen will remain the same with each added item as the Order Items section becomes larger with new items.

NOTE: If ordering from a Vendor that does not use your Product ID designations, you should probably use the Non-ID section discussed below.

### .7.6.3.2 Product ID (popup search tool)

Use the pop-up search engine screen to identify products.

### .7.6.3.3 Quantity

How many of the item do you want?

### .7.6.3.4 Desired Delivery Date (popup calendar)

Check the box if you wish subsequent items to have the same delivery date.

### .7.6.3.5 Comment

Check the box if you wish subsequent items to be accompanied with the same comment.

### .7.6.3.6 Non-ID order section

#### .7.6.3.6.1 Item Type (drop-down box)

Is this a Work Item? A Bulk Item? Select the type from the drop-down box.

#### .7.6.3.6.2 Category

Enter the Category here if you need to clarify things for the Vendor. Remember, this is a Purchase Order, so you need to provide information for the Vendor as well as your Accounting Department and your Receiving Department.

#### .7.6.3.6.3 Description

Does the Vendor have a different product name than what you use when you re-sell? Does he have a bulk shipment product package, such as 'One Pallet of 20 Large Gizmos'? Enter that description here.

Remember, again, this is a Purchase Order, so you need to provide information for the Vendor as well as your Accounting Department and your Receiving Department.

#### .7.6.3.6.4 Quantity

When entering Quantity, bear in mind that while you may be getting 12 Widgets, your order might be for 1 Dozen; specify the quantity of the units that are being according to the way the Vendor measures them.

#### .7.6.3.6.5 Price

This is a price already determined from a catalog, a price sheet, a bid, or other established price from the Vendor, NOT the price at which you may eventually sell it.

## .7.6.4 Add Order Items to Shopping List

### .7.6.4.1 Discussion

Choose which shopping list to add to, then click on [Add To Shopping List].

## .7.6.5 Order Items

### .7.6.5.1 Product

Except for Bulk Items, you can click on the Product ID to see more about it in the Catalog manager. You can also edit the description if you need to.

### .7.6.5.2 Gift Wrap (drop-down box)

If your vendor is doing drop-ship directly to your customer, this option allows for gift-wrapping by the Vendor. 'No Gift Wrap' is probably the more common choice here.

### .7.6.5.3 Quantity

How many you requested above; you can modify the quantity here as needed.

### .7.6.5.4 Unit Price

This can be adjusted here to accommodate pricing you have negotiated with the vendor, for example.

### .7.6.5.5 Adjustments

Cannot be edited here.

### .7.6.5.6 Item Total

Price times quantity less adjustments.

### .7.6.5.7 Comment

Here you can add information regarding this item, or the Comment could be identical to each item.

### .7.6.5.8 Desired Delivery Date

Telling the Vendor when you would like to receive the product or service by.

### .7.6.5.9 Inventory (link)

The QOH and ATP are stated here for YOUR inventory, not the Vendor's. If you click on the Inventory link, you are taken to the Catalog Manager Main tab, Inventory sub-tab for the Product ID which shows all inventory for this product. You can also check there on incoming shipments, anticipated production runs, and outstanding Purchase Orders. This might be a good screen to check whenever placing new Purchase Orders to avoid duplication, etc.

### .7.6.5.10 Cart Total

Total for all the items ordered so far. Does not include taxes, shipping or other adjustments which are determined in subsequent steps.

## .7.6.6 Promotion Information

### .7.6.6.1 Manual Promotions

This works just like under the Sales Order Entry method.

If you have established promotional discount terms with a vendor, such as price breaks for volume purchases, create a Promotion with those terms under the Catalog Manager > Promotions tab. Then when you create a Purchase Order where those terms can be applied, use the drop-down boxes to select them. When a Promotion or two Promotions are identified in the Manual Promotions drop-down box(es), click on [Run Promotions]. The calculation should be incorporated into the pricing of the Purchase Order.

### .7.6.6.2 Adding by Agreement

Promotions can be applied to a Purchase Order as part of an Agreement which is invoked when you begin to create the Purchase Order. Here are the steps involved:

1. Create one or more Promotions (under the Catalog Manager > Promos tab) that will be applicable by Agreement to this Vendor.
2. Open an existing or new Agreement under the Acounting Manager - Agreements tab.
3. Under Agreement Terms, create an Agreement Item of the 'Pricing Program' type.
4. Open the Promotions tab. Find the applicable Promotion from the drop-down box and apply it.

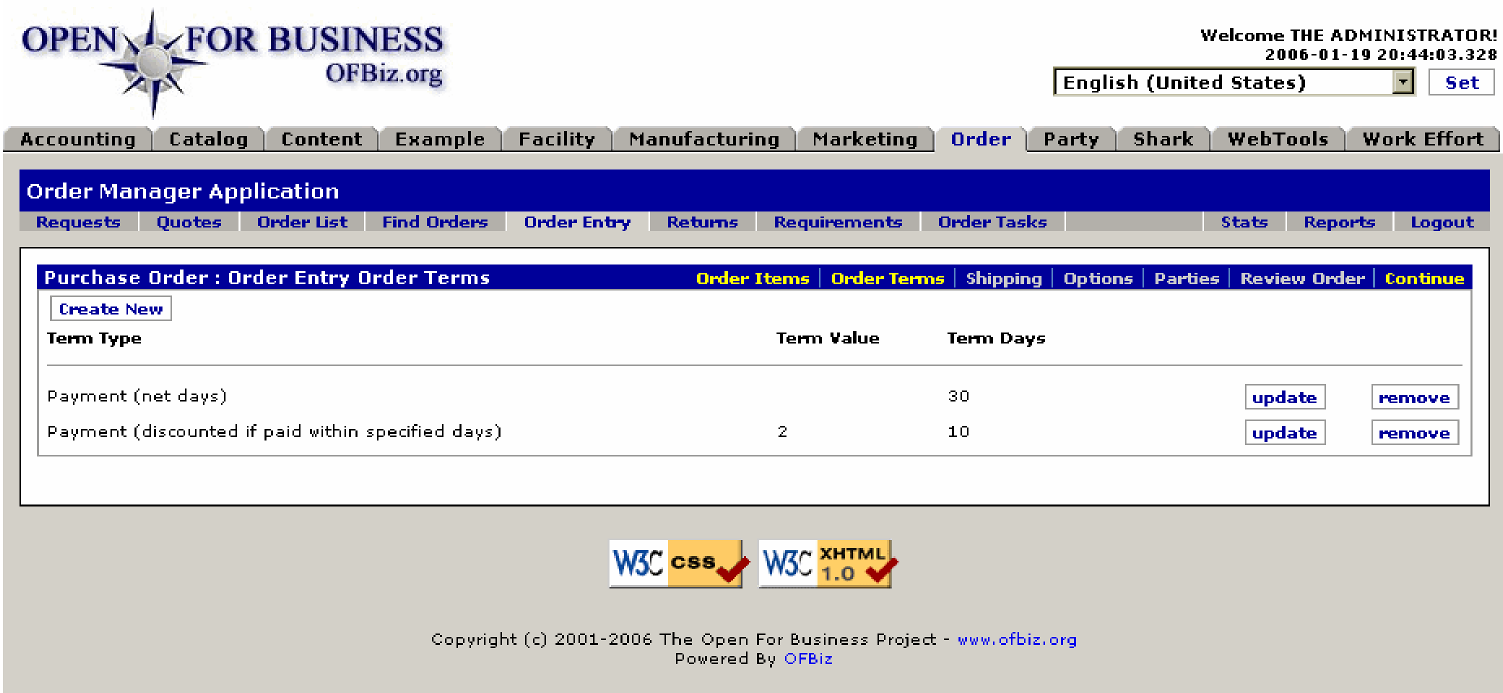
Now any time when the Agreement is incorporated as part of a Purchase Order, the terms of this Promotion will apply. If more than one Vendor offers the same terms, you can apply them in your seperate agreement with that Vendor as well. Similarly, if details of the promotion are changed, you only need to amend the Promotion, not the Agreement, and the new terms will be included.

## .7.7 Recalculate Order

When changes are made to the order within the Order Items section, click on [Recalculate Order] to update the cart information. You will also see the new total reflected in the Order Header Info section.

## .7.8 Finalize PO - Terms

## .7.8.1 finalizeOrder-PO1




The order finalization process begins with a confirmation of Terms. Press [Continue] to accept all terms and proceed.

## .7.8.2 link buttons

[Create New] [update] [remove] [Order Items] [Order Terms] [Continue]

## .7.8.3 Term Type

Defines or describes the Term.

## .7.8.4 Term Value

Usually a percentage or an amount of currency.

## .7.8.5 Term Days

Period of compliance to meet the requirements of the term.

## .7.8.6 Edit Terms (Update / Create New)

The screen to [Update] existing terms is already populated; [Create New] presents empty fields.

### .7.8.6.1 setOrderTerm


Enter new term, then press [Add] to return to PO-Terms, or [Continue] to advance to the Shipping portion.

### .7.8.6.2 link buttons

[Add] [Order Items] [Order Terms] [Continue]

## .7.9 Finalize PO - Shipping

## .7.9.1 Discussion

Use the appropriate radio button to select the Ship-to address. Click on Update if changes are needed. Click on [Continue] to proceed, but use the [Continue] link associated with the specified address or the selected Ship-to Party.

# .7.9.2 finalizeOrder-PO2


Confirm the Ship-to address, [Update with a new or revised address, or Ship to Another Party.

# .7.9.3 link buttons

[Update] [Order Items] [Order Terms] [Shipping] [Continue]

# .7.9.4 To: ... (radio buttons)

Select a radio button which gives the correct address. Then click on [Continue] to progress to the next screen.

# .7.9.5 Party ID (popup search tool)

If the recipient for this Purchase Order is another Party, identify the Party from this tool. Either enter the Party ID in the box or use the popup search tool.

## .7.10 Finalize PO - Options

## .7.10.1 finalizeOrder-PO3


Indicate shipping instructions (split-order preferences, ship date) and enter Special Instructions here, then press [Continue].

## .7.10.2 link buttons

[Order Items] [Order Terms] [Shipping] [Options] [Continue]

## .7.10.3 Ship All ... As Available

Select applicable Radio Button.

## .7.10.4 Special Instructions

Enter whatever needs to be communicated to the Vendor regarding the shipment.

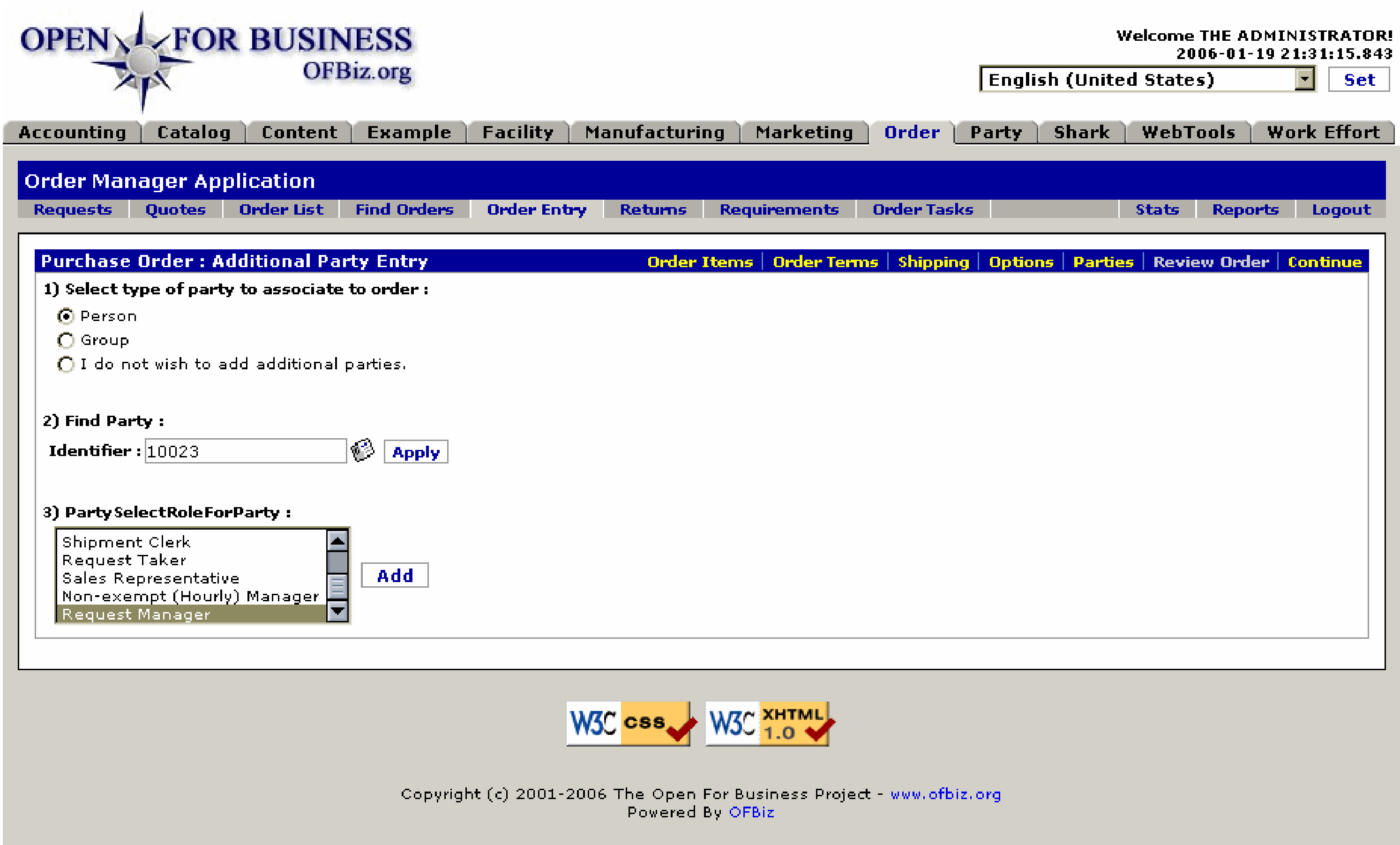
## .7.10.5 Ship Before / After Date

Use the popup calendars if a specific date is requested for the supplier to ship on before or after.

## .7.11 Finalize PO - Parties

If you wish to associate other parties - individual or group - with the order, the appropriate Radio Button will start that process. This step is optional; you may click directly on [Continue] to bring up the final review screen.

### .7.11.1 finalOrder-PO4




Optional - associate a specific Party to this PO by the 3-step process. [Add] brings up the a confirmation screen.

### .7.11.2 link buttons

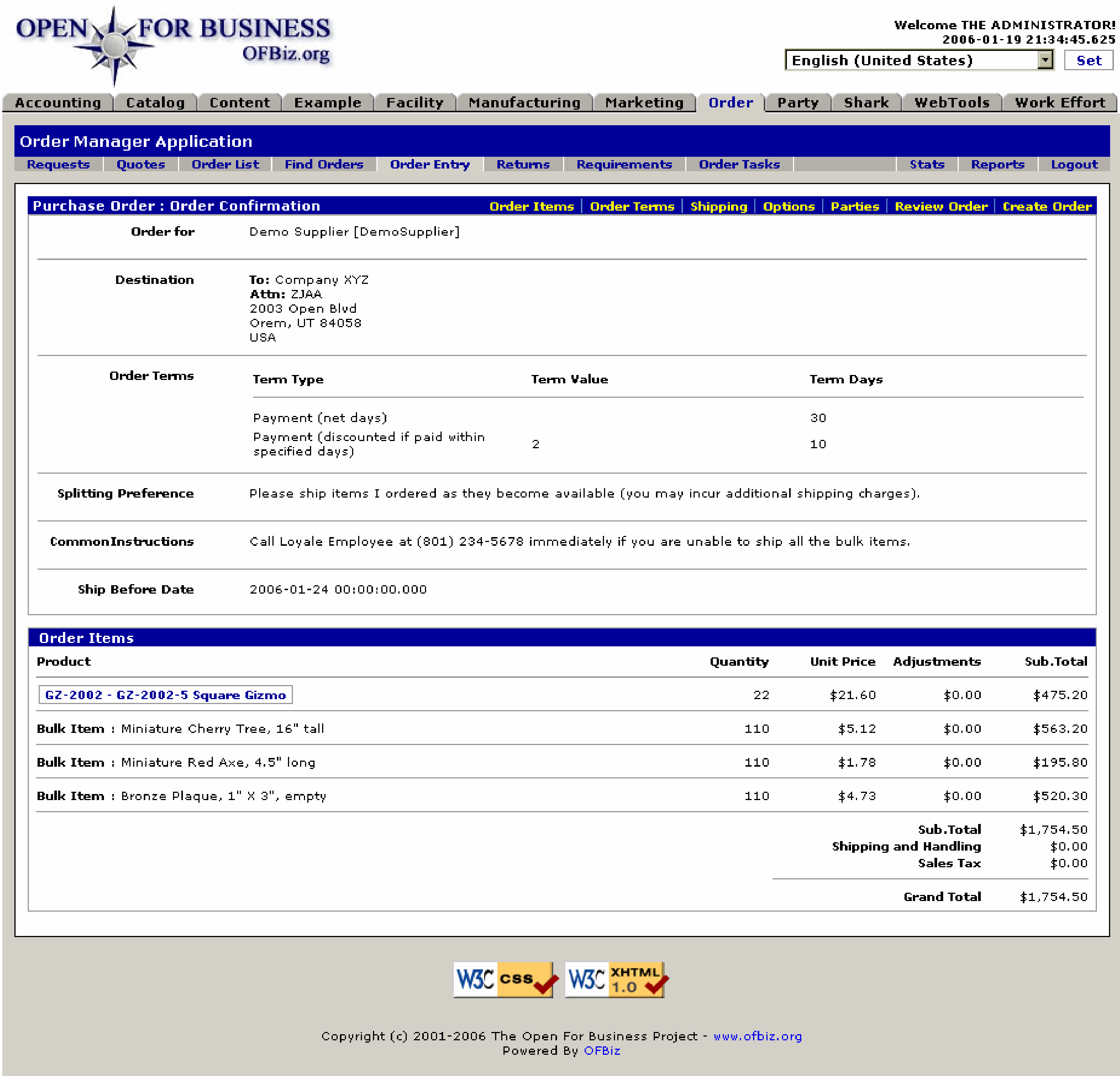
[Add] [Apply] [Order Items] [Order Terms] [Shipping] [Options] [Parties] [Continue]

## .7.12 Finalize PO - Review

This is your final chance to make changes to the order. Use the link buttons to return to whatever step in the Purchase Order creation process you need to make any changes. When all is correctly displayed here, click on the [Create Order] link.

Once the order is processed within the application, a nearly identical screen will appear with an order confirmation number showing, but without the link buttons. See 'PO Confirmation' below. Click on the Order Confirmation Number to accept and confirm the completed order.

## .7.12.1 finalOrder-PO5

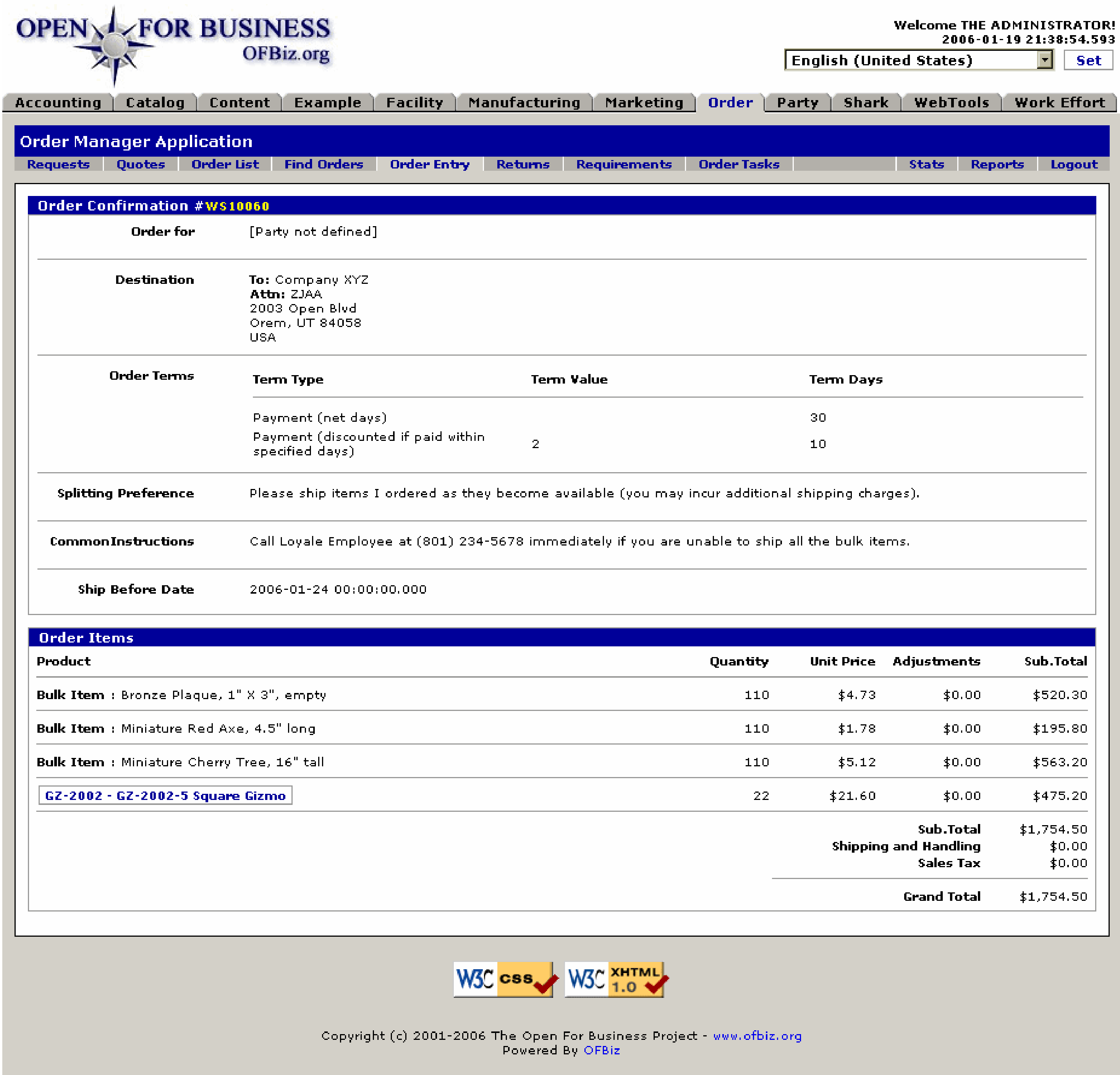



Here is the Final Review of the Purchase Order. If all is OK, click on [Create Order]. Active links will navigate you back to edit.

## .7.12.2 link buttons

[Order Items] [Order Terms] [Shipping] [Options] [Parties] [Review Order] [Create Order]

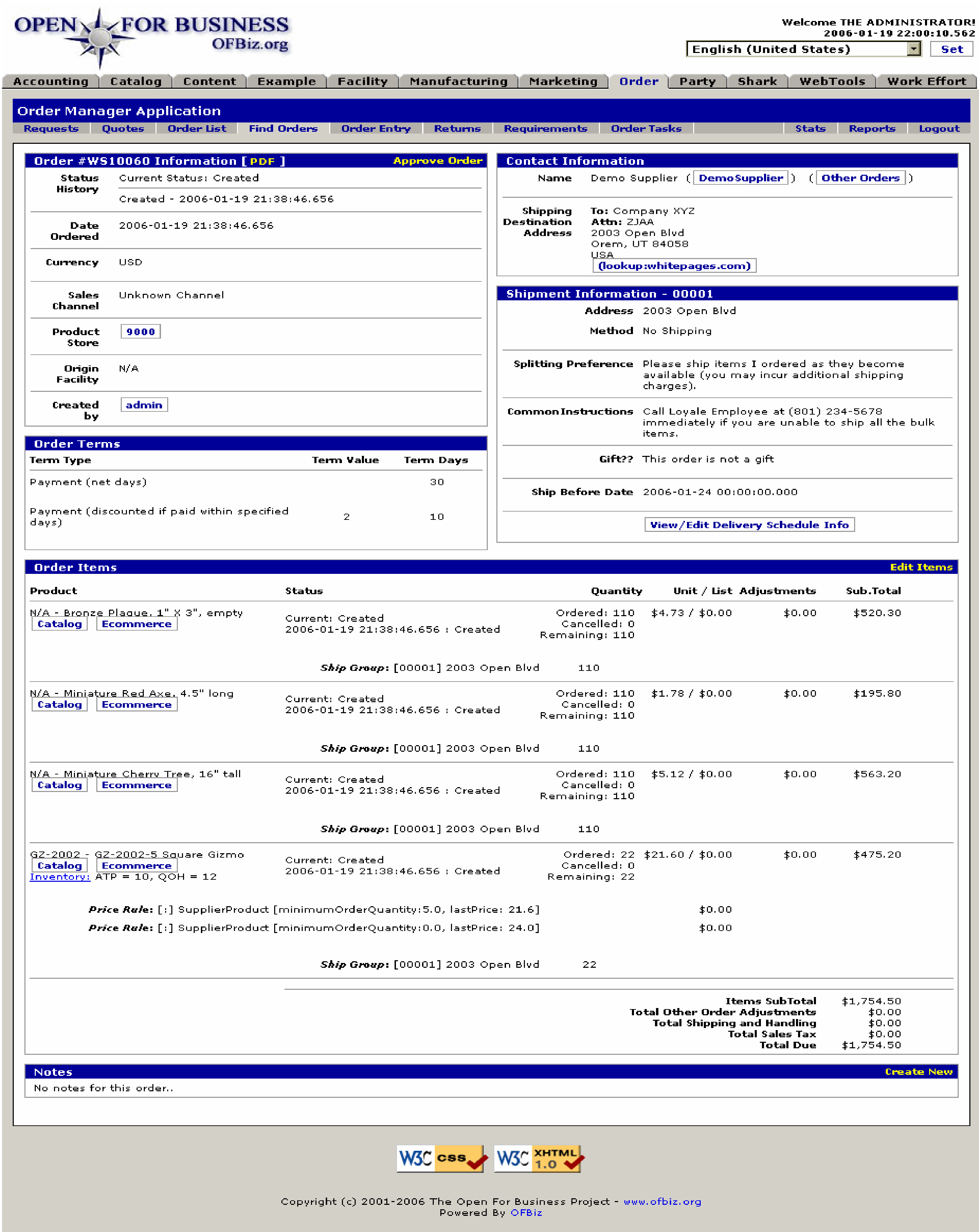
## .7.12.3 PO-Confirmation




Click on the Order Confirmation in the upper LH section; the next screen will be "Order Information" under Find Orders.

### .7.13 Approve Purchase Order

#### .7.13.1 ApproveOrder




After making any changes, click on the [Approve Order link at the top of the Order Information section.

## .7.13.2 link buttons

[Catalog] [Ecommerce] [Inventory] [(lookup:whitepages.com)] [Allow Split] [View/Edit Delivery Schedule Info] [PDF] [Approve Order] [Edit Items] [Create New]

## .7.13.3 Discussion

The final step in the process is to have the Purchase Order approved. Approval is indicated to the system when an authorized party clicks on the Approve Order link near the top of the screen. After Approval, the link [Approve Order] will be gone.

If changes need to be made before approval, click on the [Edit Items] link. Once changes are made you will be returned to this screen.

## .7.14 Edit Order Items

### .7.14.1 editOrderItems-PO

OPEN FOR BUSINESS OFBiz.org

Welcome THE ADMINISTRATOR!
2006-01-19 22:06:55.203
English (United States) Set

Accounting | Catalog | Content | Example | Facility | Manufacturing | Marketing | Order | Party | Shark | WebTools | Work Effort

## Order Manager Application

Requests | Quotes | Order List | Find Orders | Order Entry | Returns | Requirements | Order Tasks | Stats | Reports | Logout

### Order #WS10060 Information [ PDF ]

| | |
|---|---|
| Status History | Current Status: Approved<br>Approved - 2006-01-19 22:06:00.859<br>Created - 2006-01-19 21:38:46.656 |
| Date Ordered | 2006-01-19 21:38:46.656 |
| Currency | USD |
| Sales Channel | Unknown Channel |
| Product Store | 9000 |
| Origin Facility | N/A |
| Created by | admin |

### Contact Information

| | |
|---|---|
| Name | Demo Supplier ( DemoSupplier ) ( Other Orders ) |
| Shipping Destination Address | **To:** Company XYZ<br>**Attn:** ZJAA<br>2003 Open Blvd<br>Orem, UT 84058<br>USA<br>(lookup:whitepages.com) |

### Shipment Information - 00001

| | |
|---|---|
| Address | 2003 Open Blvd |
| Method | No Shipping |
| Splitting Preference | Please ship items I ordered as they become available (you may incur additional shipping charges). |
| Common Instructions | Call Loyale Employee at (801) 234-5678 immediately if you are unable to ship all the bulk items. |
| Gift?? | This order is not a gift |
| Ship Before Date | 2006-01-24 00:00:00.000 |
| Destination Facility | Web Store Warehouse<br>Quick Receive Purchase Order |
| | Web Store Warehouse<br>New Shipment For Ship Group [00001] |
| | View/Edit Delivery Schedule Info |

### Order Terms

| Term Type | Term Value | Term Days |
|---|---|---|
| Payment (net days) | | 30 |
| Payment (discounted if paid within specified days) | 2 | 10 |

### Order Items

Cancel all Items | View Order

| Product | Status | Quantity | Unit Price | Adjustments | Sub.Total | |
|---|---|---|---|---|---|---|
| N/A - Bronze Plaque, 1" X 3", empty<br>Catalog Ecommerce | Current: Approved<br>2006-01-19 22:06:00.39 : Approved<br>2006-01-19 21:38:46.656 : Created | Ordered: 110<br>Cancelled: 0<br>Remaining: 110 | 4.73 | $0.00 | $520.30 | Cancel All |
| | ***Ship Group:*** [00001] 2003 Open Blvd | 110 | | | | Cancel |
| N/A - Miniature Red Axe, 4.5" long<br>Catalog Ecommerce | Current: Approved<br>2006-01-19 22:06:00.39 : Approved<br>2006-01-19 21:38:46.656 : Created | Ordered: 110<br>Cancelled: 0<br>Remaining: 110 | 1.78 | $0.00 | $195.80 | Cancel All |
| | ***Ship Group:*** [00001] 2003 Open Blvd | 110 | | | | Cancel |
| N/A - Miniature Cherry Tree, 16" tall<br>Catalog Ecommerce | Current: Approved<br>2006-01-19 22:06:00.39 : Approved<br>2006-01-19 21:38:46.656 : Created | Ordered: 110<br>Cancelled: 0<br>Remaining: 110 | 5.12 | $0.00 | $563.20 | Cancel All |
| | ***Ship Group:*** [00001] 2003 Open Blvd | 110 | | | | Cancel |
| GZ-2002 - GZ-2002-5 Square Gizmo<br>Catalog Ecommerce | Current: Approved<br>2006-01-19 22:06:00.39 : Approved<br>2006-01-19 21:38:46.656 : Created | Ordered: 22<br>Cancelled: 0<br>Remaining: 22 | 21.60 | $0.00 | $475.20 | Cancel All |
| | ***Ship Group:*** [00001] 2003 Open Blvd | 22 | | | | Cancel |

Update Items

Additional Feature 0.00 Add

| | |
|---|---|
| Items SubTotal | $1,754.50 |
| Total Other Order Adjustments | $0.00 |
| Total Shipping and Handling | $0.00 |
| Total Sales Tax | $0.00 |
| Total Due | $1,754.50 |

### Add To Order

Product ID :

Price : Override Price

Quantity : 1

Ship Group : 00001

Desired Delivery Date :

Comment :

Add To Order

### .7.14.2 link buttons

[Catalog] [Ecommerce] [Allow Split] [Other Orders] [(lookup:whitepages.com)] [Quick Receive Purchase Order] [New Shipment For Ship Group ...] [View/Edit Delivery Schedule Info] [Cancel All] [Cancel] [Update Items] [Add] [Add To Order] [PDF] [Approve Order] [Cancel all Items] [View Order] [Create New]

### .7.14.3 Discussion

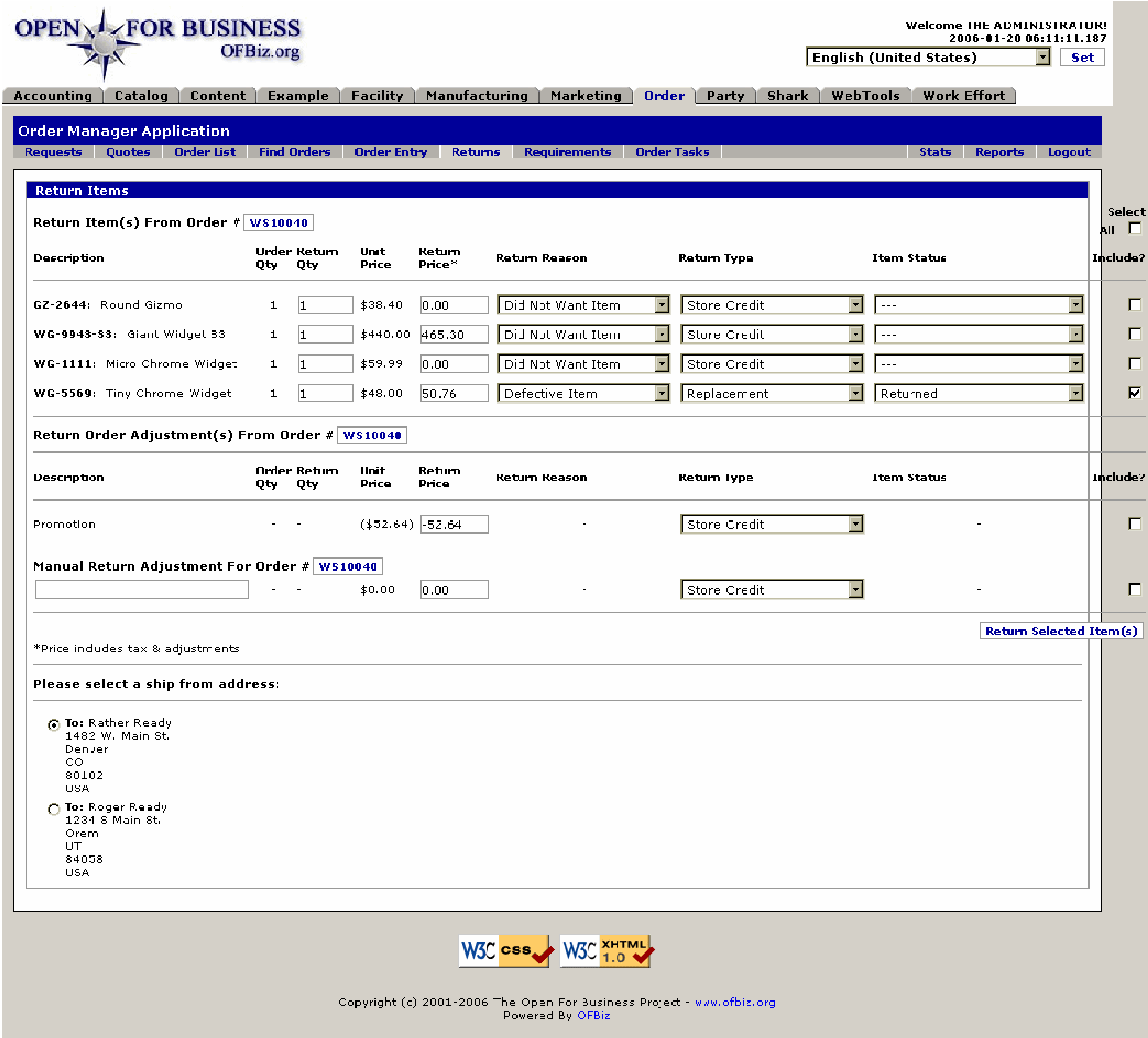
This screen will be somewhat different before and after [Approve Order] has been clicked. In either condition, [Edit Items] opens up the screen to editable fields for making changes. After any changes are made, be sure to click [Update Items] which will return you to the previous screen.

Note how additional items can be added to the Purchase Order, even after it has been approved. This is important when last minute communication with a Vendor allows you to quickly add to your earlier order. Use this section here to document those late additions.

# .8 Returns

## .8.1 Create Return from Order

### .8.1.1 quickreturn




When you choose to [Create Return] directly from an order, this "quickreturn" screen is presented. Check item(s) being returned.

## .8.1.2 link buttons

[Return Selected Item(s)]

## .8.1.3 Discussion

While viewing an existing order, you can create a return from that order by clicking on the [Create Return] button.

That will take you to the quickreturn screen, shown above, from where you identify which item(s) the customers wants to return.

Be clear about the reason and the quantity to be returned. Also be sure that the Return Price does not exceed how much the customer actually paid for the item. Return Type is important because it is always to your advantage to have the purchase price applied as a credit towards another purchase rather than having to take money out of your business to pay a refund.

When the information is correctly selected and entered, click the link [Return Selected Items] to create the Return. That also takes you to the Returns tab, Return Items sub-tab, discussed further below.

## .8.1.4 Return Items from Order ...

Click on the Order ID to be taken to the View Order screen.

## .8.1.5 Select All (check box)

If the party wishes to return all of the items in the order, click on this check box.

## .8.1.6 Description

Product ID and name of the product in the order being considered for return.

## .8.1.7 Order Qty

How many were shipped with the order.

## .8.1.8 Return Qty

How many the customer would like to return.

Be sure this does not exceed the Order Qty. If that attempt is made, have them return any surplus against another order from where they probably obtained it.

## .8.1.9 Unit Price

What was paid for the item when purchased under this Sales Order.

## .8.1.10 Return Price *

The Price at which the customer will be credited. This is a mandatory field .

For example, if the customer received a promotional discount of 10% on a $100 item, you would not return $100 (the Unit Price) but only the discounted price of $90 which they originally paid for it.

## .8.1.11 Return Reason (drop-down box)

Select the best-stated reason for the return. Remember that Returns need to be approved. Some items may be sold with a re-shelving fee, others may be close-outs with no returns authorized.

Choices in the drop-down box might include:

- Defective Item
- Did Not Want Item
- Mis-Shipped Item
- Digital Fulfillment Failed

## .8.1.12 Return Type (drop-down box)

This establishes how the financial aspects of the return will be handled. Choices in the drop-down box might include:

- Store Credit
- Refund
- Replacement
- Cross-Ship Replacement

## .8.1.13 Item Status (drop-down box)

What is the current status of the Item? The status could be one of the following:

- — - the item status is unknown
- On Order - the item was not yet shipped but is no longer wanted
- Available - the item is in your facility

- Promised - the item is committed to fulfilling another order
- Delivered - the item is on its way to the Customer now wanting to return it
- Being Transferred - the item is being moved from one location or section to another
- Being Transferred (Promised) - the item is being moved AND it has already been committed to fulfilling another order
- Returned - the item has physically been sent back from the customer to your facilities
- Defective - whatever the location or other status may be, the item itself is considered defective and should not be promised to fulfill another order.

## .8.1.14 Include? (check box)

Check this box to the side of each item being returned; leave blank of an item is not being returned.

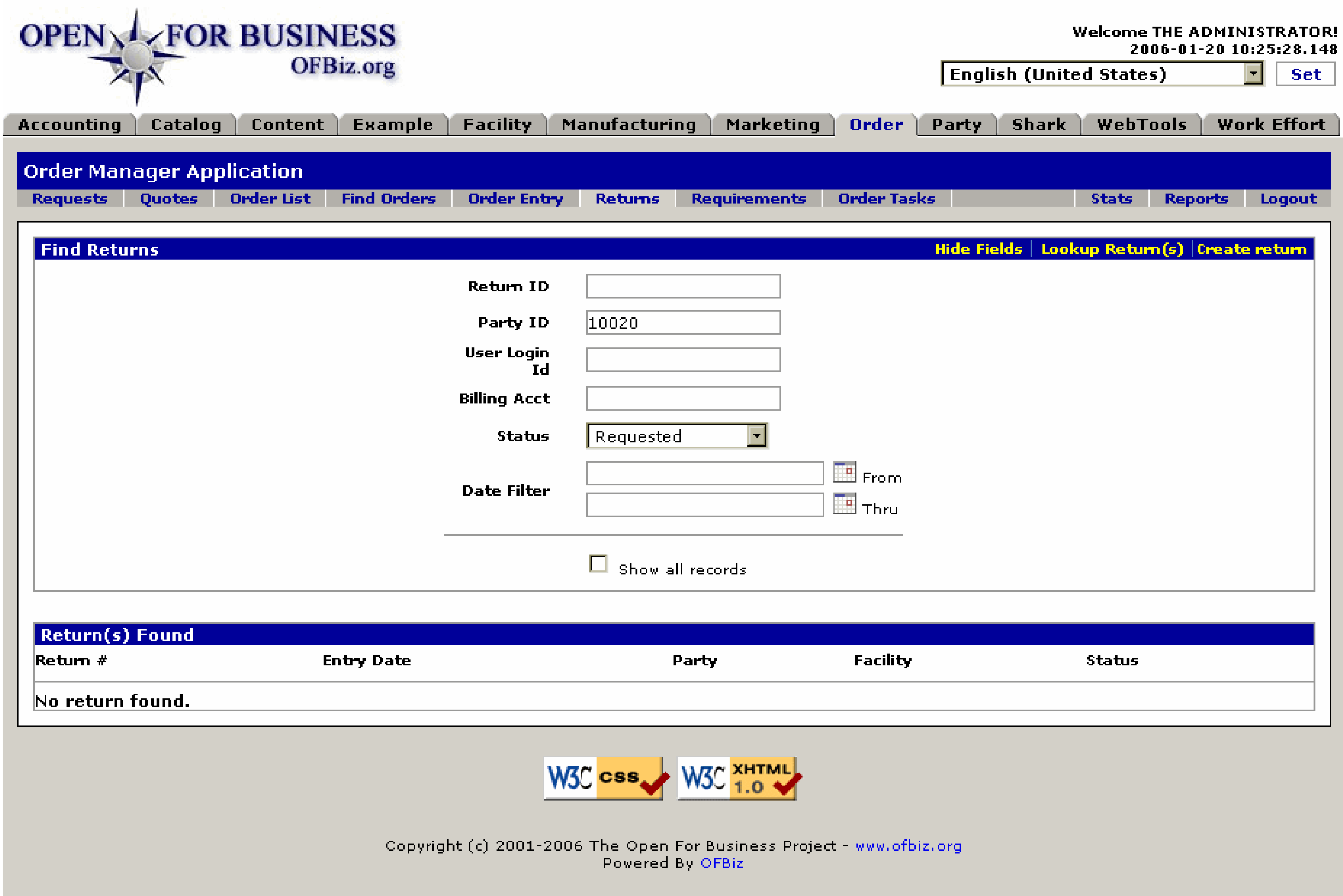
## .8.1.15 Select a ship from address (radio buttons)

Click on the radio button corresponding with the address from which the items will be returned. This will generally match the ship-to address for the original Sales Order.

## .8.1.16 Return Selected Items - successful


Successfully created Return, discussed elsewhere. [Accept Return] to proceed.

## .8.2 findreturn




The first screen under the Returns tab. Enter search parameters, then [Lookup Return(s)], or click to [Create Return].

## .8.3 link buttons

[Show all records] [Show / Hide Fields] [Lookup Return(s)] [Create return]

## .8.4 Search parameters

### .8.4.1 Return ID

If you already know the Return ID, enter the ID number here to access the Return document.

### .8.4.2 Party ID

The Party which placed the order against which the Return was created.

### .8.4.3 UserLogin ID

The login ID of the Party which requested the creation of the Return.

### .8.4.4 Billing Acct

If the Return was against a Billing Account, what is the Account number of that account.

### .8.4.5 Status (drop-down box)

Default listings include:

- Any return status
- Requested
- Accepted
- Received
- Completed
- Cancelled

### .8.4.6 Date Filter (popup calendars)

Popup calendars for From and Thru dates.

### .8.4.7 Show All Records (checkbox)

A click on this link will return all existing returns, subject to the parameters entered. If all fields are blank, every Return will be listed.

# .8.5 Create New Return

## .8.5.1 returnMain-New


If you are not starting from a View Order screen, you can initiate the creation of a new Return from this screen.

## .8.5.2 link buttons

[Create New]

## .8.5.3 Currency (drop-down box)

Select the type of currency which formed the basis of the original order; you will need to maintain that currency through the return.

## .8.5.4 Entry Date (popup calendar)

Defaults to Now. Enter the event date if this is a followup to an off-line transaction.

### .8.5.5 Return From Party

Enter the Party ID of the one returning items from his previously fulfilled order.

### .8.5.6 Return To Facility (drop-down box)

Generally this would be the facility which originally shipped the items to the party.

### .8.5.7 Billing Account

If one exists, record the number now.

### .8.5.8 Needs Auto-Receive (Y/N)

Needs Auto-Receive (On ACCEPT) means that the item is already here and that when the Return is Accepted, it will be processed as an Auto Receive rather than through the normal steps in the facility.

## .8.5.9 Return Created

### .8.5.9.1 createReturn


When a new Return is created, this screen confirms the creation with a new Return number.

### .8.5.9.2 link buttons

[PDF] [Update] [Return Header] [Return Items]

### .8.5.9.3 Discussion

This screen is very similar to the View/Edit screen presented below. See View/Edit Returns for further details.

## .8.6 Return(s) found

### .8.6.1 findreturn-showall


All returns meeting the entered parameters are shown. Click on the Return ID or [View] to proceed.

### .8.6.2 link buttons

[View] [Show / Hide Lookup Fields] [Previous] [Next]

### .8.6.3 Return #

Click on this number or on the associated [View] link button to view details of the Return. At that screen you can take the next steps to process the Return.

### .8.6.4 Entry Date

Date the return was created.

### .8.6.5 Party

Click on the Party ID to view details about the Party.

### .8.6.6 Facility

Where the items are to be returned.

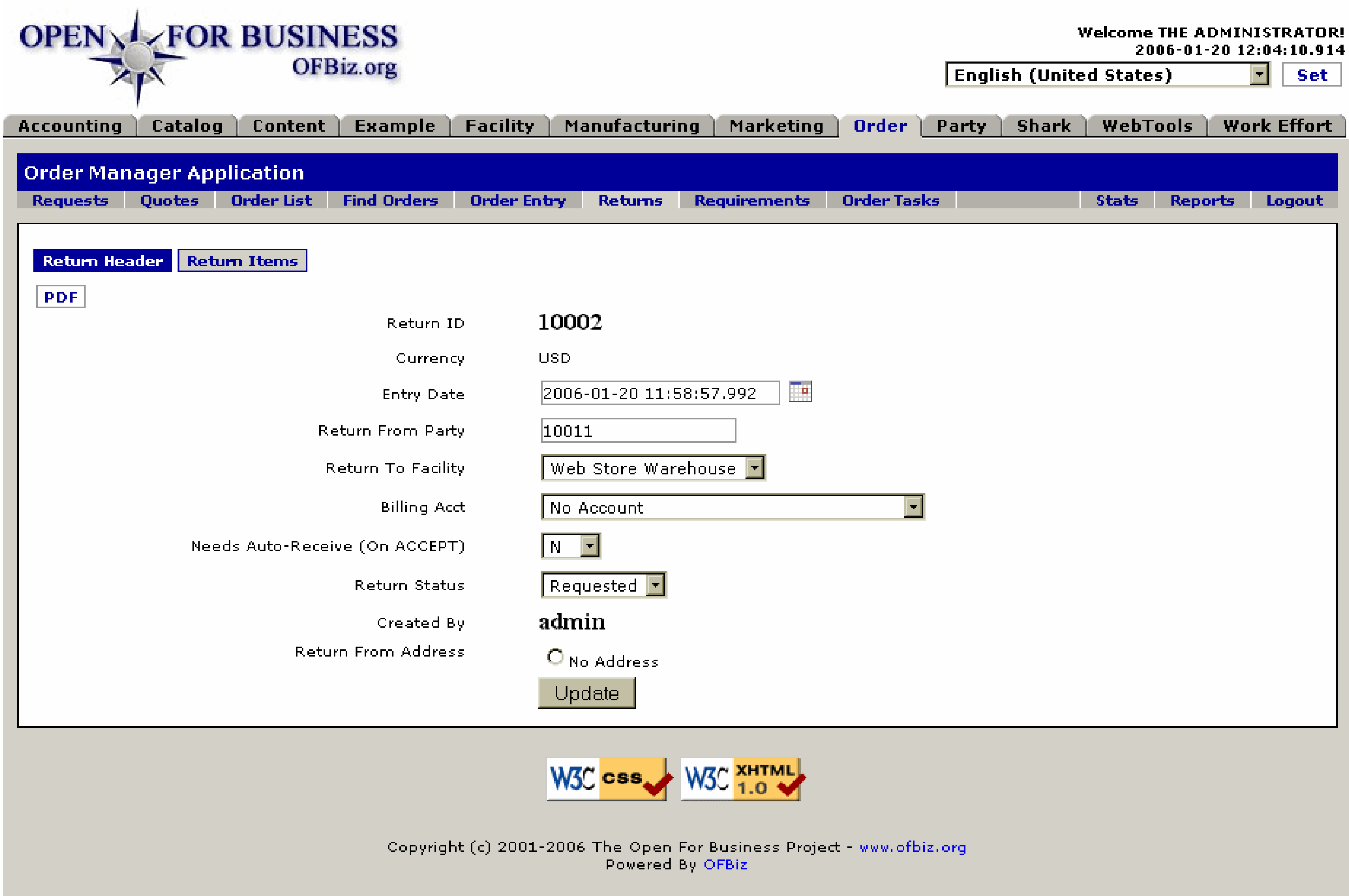
### .8.6.7 Status

The Status of where this return is in the system.

# .8.7 View/Edit Return

## .8.7.1 Return Header

### .8.7.1.1 returnMain-found




The Header or key elements of the Return are shown here. Return Items are viewed and selected under the Return Items tab.

### .8.7.1.2 link buttons

[PDF] [Update] [Return Header] [Return Items] [Receive Return]

### .8.7.1.3 Discussion

The Return process involves a coordinated effort with Facilities, Accounting, and the Order managers. The tab [Receive Return] is not visible on this screen until the Return has been Accepted. That tab actually takes you into the Facilities Manager for further processing of the Return.

### .8.7.1.4 Return ID

This is a number assigned by the system when the Return is first requested.

### .8.7.1.5 Currency

The national currency in which the Order and the Return are based.

### .8.7.1.6 Entry Date (popup Calendar)

If the date of creation for the return documentation was different from the date of the event, you can change it using the drop-down calendar.

### .8.7.1.7 Return from Party

Enter the Party ID for the party returning the item to you.

### .8.7.1.8 Return to Facility (drop-down box)

Of the facilities you represent, which one will be receiving the returned item?

### .8.7.1.9 Billing Account

If an account exists for billing the Party, this is the account number.

### .8.7.1.10 Needs Auto-Receive (Y/N)

Needs Auto-Receive (On ACCEPT) means that the item is already here and that when the Return is Accepted, it will be processed as an Auto Receive rather than through the normal steps in the facility.

### .8.7.1.11 Return Status (drop-down box)

Depending upon the progress through the system, Status could be selected from among the following:

- Requested

- Accepted
- Canceled
- Received
- Completed

## .8.7.1.12 Created By

The party that took the steps to create this documentation of the return.

## .8.7.1.13 Return From Address

Radio buttons; choose one. If the Party has multiple addresses associated with his ID, select the one from which the items will be returned. If the customer is a walk-in, there might not be an associated address.

## .8.7.2 Return Items

### .8.7.2.1 returnItems


Select the Order ID then click on [Load Order Items] if they are not yet displayed in the table; remove any not being returned.

### .8.7.2.2 link buttons

[PDF] [Load Order Items] [Return Header] [Return Items] [Receive Return]

### .8.7.2.3 Order #

Click on the Order ID to view the entire order.

### .8.7.2.4 Item #

Each order has one or more Items; this is the Item number from which part or all of the quantity will be returned.

### .8.7.2.5 Description

Generally the Product ID and/or product name.

### .8.7.2.6 Return Qty

How many are being returned.

### .8.7.2.7 Return Price

This represents how much credit will return to the customer with this return.

### .8.7.2.8 Reason

Why was the return requested?

### .8.7.2.9 Type

Whether the customer wants a refund of his cash, a credit to order something else, a replacement of the same item, etc.

### .8.7.2.10 Response

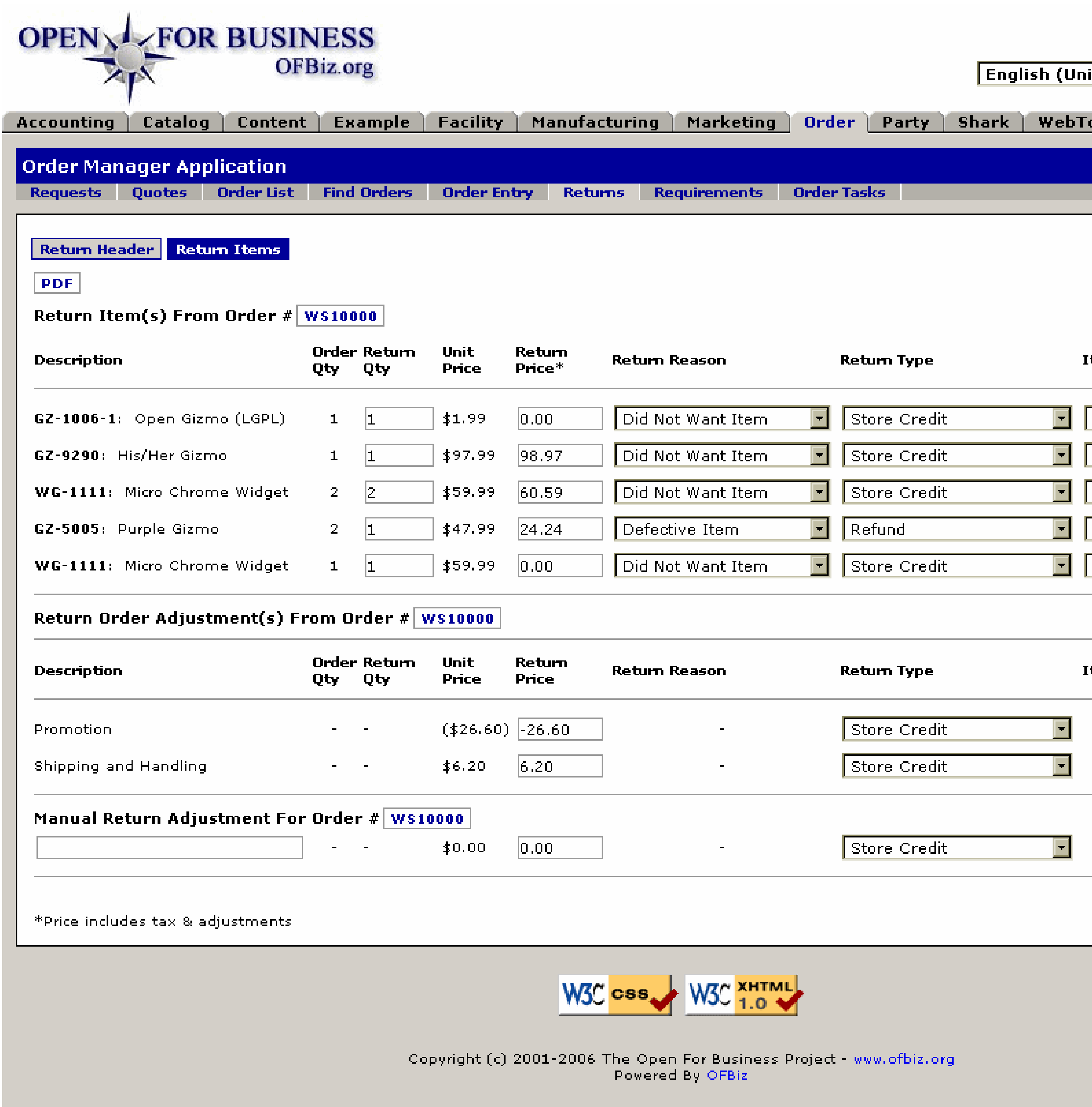
Reserved.

### .8.7.2.11 Return Item(s) (drop-down box)

Select the Order Number then click on 'Load Order Item(s).' The Loading Tool discussed below will present a working screen based upon the items ordered.

## .8.7.2.12 Return Items Loading tool

### .8.7.2.12.1 returnItems-loaded




The check mark in the RH column is all important; only checked items are being returned.

## .8.7.2.12.2 link buttons

[Return Selected Items] [PDF] [Return Header] [Return Items]

## .8.7.2.12.3 Description


After loading items, update Status to Accepted under Return Header; that will bring out the [Receive Return] tab for you.

This column is populated from the original order with the ID and Description of each item that can be returned.

## .8.7.2.12.4 Order Qty

Shows the quantity ordered.

## .8.7.2.12.5 Return Qty

Enter the number of units to be returned by the customer.

Automatically populated with the maximum number of units that can be returned; already adjusted to reflect items previously returned. Therefore, reduce the number to indicate the actual quantity being returned.

## .8.7.2.12.6 Unit Price

The price at which the product was sold.

### .8.7.2.12.7 Return Price

1. Must be specified.

2. Includes tax and adjustments.

3. This is the price amount which will be credited back to the customer. It may be different from the Unit Price because of promotional discounts, interim price changes, etc.

### .8.7.2.12.8 Return Reason (drop-down box)

Select from the list of acceptable reasons.

#### .8.7.2.12.8.1 If reason not listed ...

Additional reasons can be programmed into the system as their need develops.

#### .8.7.2.12.8.2 Why is a reason needed?

This information is used when receiving the return to help decide whether to put the item back into inventory, throw it out, schedule it for repairs, etc.

### .8.7.2.12.9 Return Type (drop-down box)

How will this be made right for the customer? Select from the list of ways this return will be credited to the customer - as a store credit, a replacement unit, etc.

### .8.7.2.12.10 Return Status (drop-down box)

What is the current status of the Item? The status could be one of the following:

- — - the item status is unknown
- On Order - the item was not yet shipped but is no longer wanted
- Available - the item is in your facility
- Promised - the item is committed to fulfilling another order
- Delivered - the item is on its way to the Customer now wanting to return it
- Being Transferred - the item is being moved from one location or section to another
- Being Transferred (Promised) - the item is being moved AND it has already been committed to fulfilling another order
- Returned - the item has physically been sent back from the customer to your facilities
- Defective - whatever the location or other status may be, the item itself is considered defective and should not be promised to fulfill another order.

### .8.7.2.12.11 Select for return (All)

Check the box associated with each line that has product for return. If All, check the box above the column.

### .8.7.2.12.12 Return Selected Items

Click on this after the work screen is correctly completed to process the return. This screen will not be available again, so be sure that all selections are correct. If you need to make additional returns later against the same order, create a new Return.

## .8.7.2.13 ReturnItems-Accepted

## .8.7.2.13.1 ReturnItems-Accepted

## .8.7.2.13.2 link buttons

[PDF] [Return Header] [Return Items] [Receive Return]

## .8.7.2.13.3 Discussion

At this point you have identified the items for return, updated the Status to Approved at the Return Header screen, and returned to this Return Items screen to confirm that everything is correct. All of the fields have already been discussed above.

From this point you now have a new link button - [Receive Return].

When you click on that, you are taken to the Facility Manager > Facilities tab > Receive Return sub-tab, shown below.

## .8.7.3 Receive Return

### .8.7.3.1 receiveReturn


Returned items are "received" in the Facility Manager, at the Facilities tab > Receive Return sub-tab.

### .8.7.3.2 Discussion

Subsequent steps in the Returns process are discussed in the Facility Manager > Facilities tab > Receive Return sub tab.

IMPORTANT: What the customer needs from you at this point are three pieces of information to include on the outside of the package he is returning:

1. His original Order Number.
2. This Return Number (shown in the screen above after the words 'Receive Return' and highlighted inside the link box).
3. The exact Return Address where you want him to return the item(s). That may be different from the address shown on the package he received.

They should keep this information available for themselves in case they need to call back to check on the status of their return.

## .9 Requirements

### .9.1 FindRequirements


Use the search tool to specify the Requirement by ID or to reduce the volume of Requirements shown in the table of search hits.

### .9.2 link buttons

[New Requirement] [Lookup] [Requests] [Orders] [Remove]

## .9.3 Search Tool

### .9.3.1 Requirement ID

Select appropriate radio button: Equals / Begins With / Contains / Is Empty

Check box if appropriate: Ignore Case

### .9.3.2 OrderRequirementType ID (drop-down box)

Select from the drop-down box, only if you are sure of the type. Entering incorrectly will prevent the 'hit' on the one you want.

### .9.3.3 OrderRequirementStatus ID (drop-down box)

Select from the drop-down box. If unsure, leave blank because any inaccurate item will prevent a good hit.

- Choices might include:
- —
- Approved
- Created
- Ordered
- Rejected

### .9.3.4 Product ID (popup search tool)

If you know the subject Product ID, you could search on that piece here.

### .9.3.5 Description

This is a tough pathway to search on. Whatever you enter needs to be included within the Description exactly as you enter it for you to obtain a hit.

Select appropriate radio button: Equals / Begins With / Contains / Is Empty

Check box if appropriate: Ignore Case

### .9.3.6 Manufacturing Requirement Start Date (popup calendars)

Using the popup calendars, enter two dates to bracket the date.

Select from these radio buttons for the top date:

Equals / Same Day / Greater Than From Day Start / Greater Than.

Select from these radio buttons for the bottom date: Less Than / Up To Day / Up Thru Day / Is Empty.

### .9.3.7 Manufacturing Requirement By Date (popup calendars)

Using the popup calendars, enter two dates to bracket the date.

Select from these radio buttons for the top date:

Equals / Same Day / Greater Than From Day Start / Greater Than.

Select from these radio buttons for the bottom date: Less Than / Up To Day / Up Thru Day / Is Empty.

## .9.4 Table of Requirements

### .9.4.1 Discussion

The results of your search are displayed in this table. If there are too many hits in the table to allow quick discovery of the Requirement you seek, enter another parameter or two into the search and you should have fewer presented.

Several of the columns have link items, discussed below. The other columns in the table include:

- Status
- Requirement Type
- Product
- Requirement Start Date
- Required By Date
- Quantity

### .9.4.2 Requirement ID

Click on this linked Requirement ID number to be taken to the Requirements Tab > EditRequirement screen where you can view and update the details about the requirement as well as tab into other screens.

### .9.4.3 Requests Link

Click on the [Requests] link associated with the Requirement to see what Request might have led to this Requirement.

### .9.4.4 Orders Link

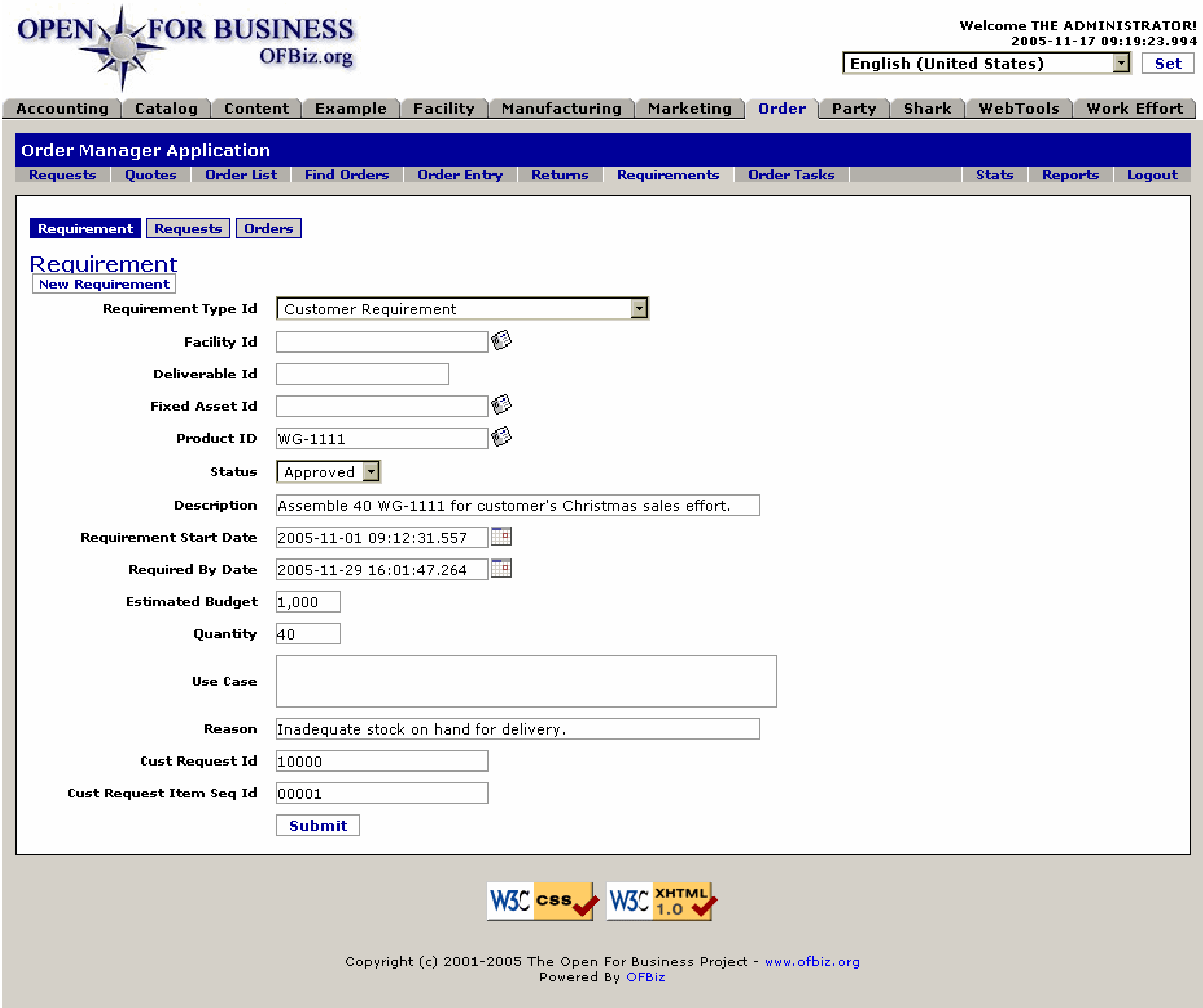
Click on the [Orders] link associated with the Requirement to see what Order might have led to this Requirement.

### .9.4.5 Delete Link

Click on [Remove] to delete this Requirement.

## .9.5 Edit Requirement

### .9.5.1 editRequirement




Enter all the new or additional details of this Requirement, then click [Submit].

### .9.5.2 link buttons

[New Requirement] [Submit] [Requirement] [Requests] [Orders]

### .9.5.3 Requirement Type ID (drop-down box)

Select from among these kinds of Types:

- ProductionRun proposed by the MRP process
- Purchase
- Order proposed by the MRP process
- Customer Requirement
- Internal Requirement
- Product
- Requirement
- Work Requirement

### .9.5.4 Facility ID (popup search tool)

Use the popup search tool to specify which of your facilities will be doing the work to fulfill the Requirement.

### .9.5.5 Deliverable ID

If the Requirement asks for a Deliverable item (other than or in addition to an established company Product), this will be the identity to associate with the Deliverable upon delivery.

### .9.5.6 Fixed Asset ID (popup search tool)

Use the popup to specify which Fixed Asset may be assigned to perform effort under this Requirment.

### .9.5.7 Product ID (popup search tool)

Use the popup to specify which Product is the subject of this Requirement.

### .9.5.8 Status (drop-down box)

Status selected from the drop-down box might include:

- —
- Created
- Approved
- Ordered
- Rejected

### .9.5.9 Description

What is being sought in this Requirement?

### .9.5.10 Requirement Start Date (popup calendar)

When did action on this Requirement (including this documentation) actually begin?

### .9.5.11 Required By Date (popup calendar)

When must the efforts of this Requirement be completed.

### .9.5.12 Estimated Budget

In units of currency, what is the total amount of funds estimated to complete this Requirement?

### .9.5.13 Quantity

How many of a product, man-hours of effort, copies of a deliverable, etc., are needed to fulfill this Requirement?

### .9.5.14 Use Case

Complete as appropriate. The 'Use Case' concept is a specific tool in the production world.

### .9.5.15 Reason

Unlike Description which spells at the 'What' for this Requirement, here you may enter the 'Why' or the reasons this Requirement is needed.

### .9.5.16 Created Date (popup calendar)

Note: This does NOT automatically populate, so you should record the date when the Requirement is created.

### .9.5.17 Created By User Login

Login ID of the party that created the Requirement.

### .9.5.18 Last Modified Date (popup calendar)

Note: This does NOT automatically update, so you should record the date each time the Requirement is edited.

### .9.5.19 Last Modified By User Login

Note: This does NOT automatically update, so you should record your ID each time the Requirement is edited.

### .9.5.20 Cust Request ID

If this Requirement is associated with a Customer Request, enter that ID here.

### .9.5.21 Cust Request Item Seq Id

As a Request may generate multiple Requirements, here you identify which Item Sequence in the Request led to this one.

### .9.5.22 New Requirement

The screen for creating a New Requirement is identical to this screen but it appears with all fields empty except default drop-down items.

## .9.6 Requests tab

### .9.6.1 ListRequirement CustRequests


Either click on the Cust Request ID or the Cust Request Item Seq ID.

### .9.6.2 link buttons

[Requirement] [Requests]

### .9.6.3 Cust Request ID

This ID is a link to the Customer Request under the Order Manager >> Requests tab >> Request sub-tab.

### .9.6.4 Cust Request Item Seq Id

This ID is a link to the line item or Sequence ID number of the original Request in the Order Manager > Requests tab > Order Item sub-tab.

## .9.7 Orders tab

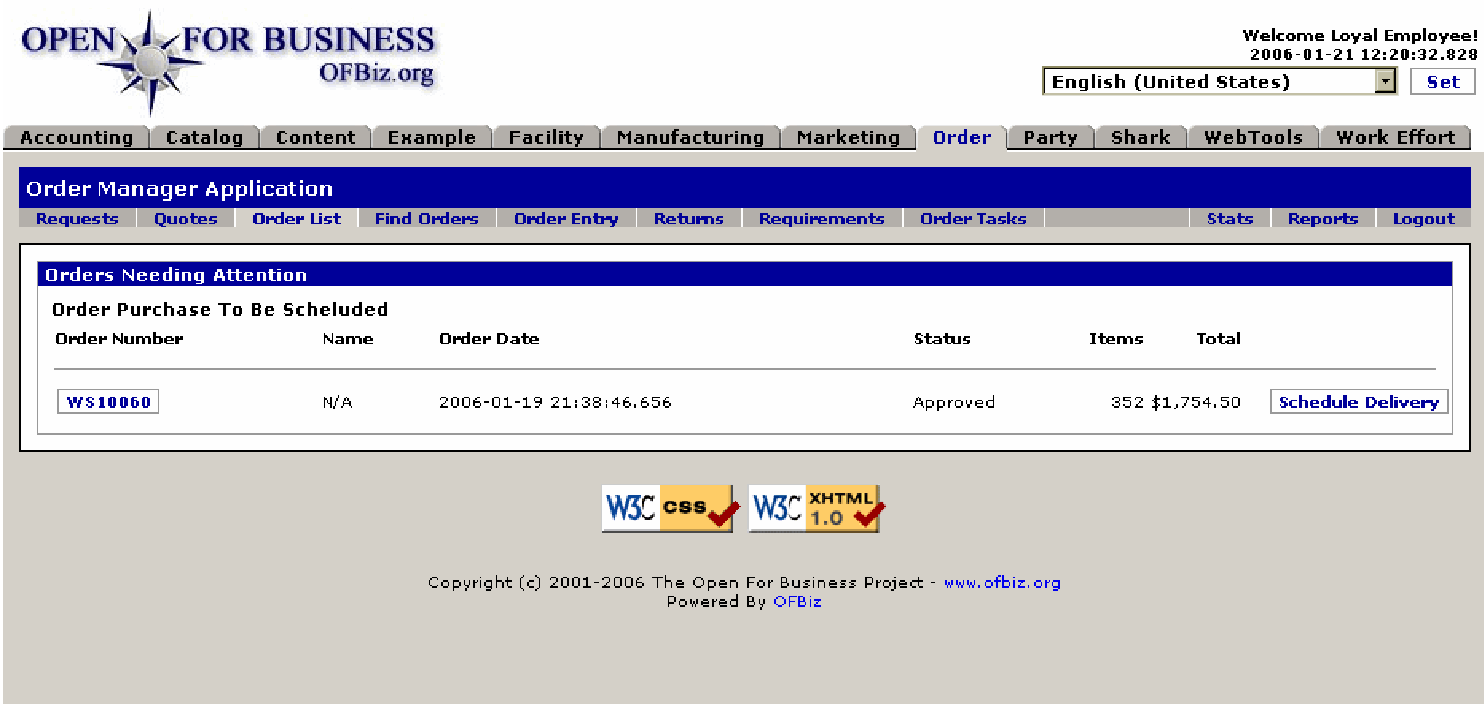
To be completed.

# .10 Order Tasks

## .10.1 Discussion

Returns you to the Order List tab with any currently assigned order tasks gathered into the table for you.

## .10.2 Tasklist




If the Party currently logged in has any pending tasks to perform with existing Orders, this list appears. Click the order number.

## .10.3 link buttons

[Schedule Delivery]

## .10.4 Order Number

Click on this number to bring up the Sales Order or Purchase Order needing your attention.

## .10.5 Name

Name of the task, if any.

## .10.6 Order Date

Date the Order was placed.

## .10.7 Status

Status of the Order: has it been Approved yet?

## .10.8 Items

Which Items in the Order need to be attended to.

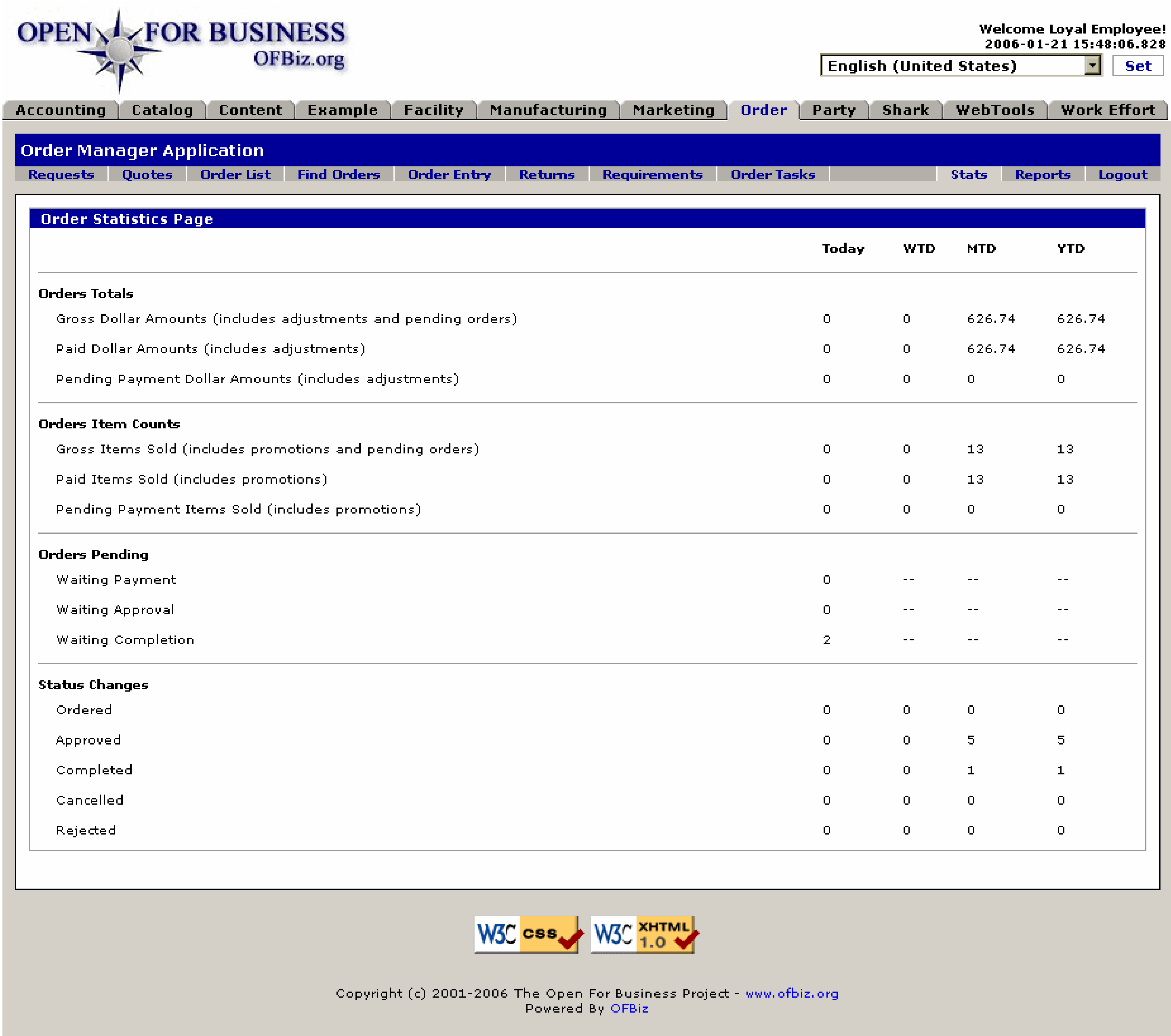
## .10.9 Total

The value of the Order.

# .11 Stats

Order Statistics page, presented in columns for Today | WTD | MTD | YTD

## .11.1 orderstats




| | Today | WTD | MTD | YTD |
|---|---|---|---|---|
| **Orders Totals** | | | | |
| Gross Dollar Amounts (includes adjustments and pending orders) | 0 | 0 | 626.74 | 626.74 |
| Paid Dollar Amounts (includes adjustments) | 0 | 0 | 626.74 | 626.74 |
| Pending Payment Dollar Amounts (includes adjustments) | 0 | 0 | 0 | 0 |
| **Orders Item Counts** | | | | |
| Gross Items Sold (includes promotions and pending orders) | 0 | 0 | 13 | 13 |
| Paid Items Sold (includes promotions) | 0 | 0 | 13 | 13 |
| Pending Payment Items Sold (includes promotions) | 0 | 0 | 0 | 0 |
| **Orders Pending** | | | | |
| Waiting Payment | 0 | -- | -- | -- |
| Waiting Approval | 0 | -- | -- | -- |
| Waiting Completion | 2 | -- | -- | -- |
| **Status Changes** | | | | |
| Ordered | 0 | 0 | 0 | 0 |
| Approved | 0 | 0 | 5 | 5 |
| Completed | 0 | 0 | 1 | 1 |
| Cancelled | 0 | 0 | 0 | 0 |
| Rejected | 0 | 0 | 0 | 0 |



Although the numbers are not typical, this is a typical screen showing Order Statistics for the periods of time.

## .11.2 link buttons

(none)

## .11.3 Orders Totals

### .11.3.1 Gross Dollar Amounts

Total volume (in your currency) of all the orders placed in each of the categories: Today, this week, this month, and this year.

### .11.3.2 Paid Dollar Amounts

How much money, in your currency, has been received from all sales in the 4 given time periods.

### .11.3.3 Pending Payment Dollar Amounts

How much money is still to be received from orders accepted but not yet paid for or not yet shipped. The total of this plus the Paid Dollar Amounts should equal the Gross Dollar Amounts after adjustments.

## .11.4 Orders Item Counts

### .11.4.1 Gross Items Sold

Total of all the number of units of sale, as sold in each of the 4 time periods.

### .11.4.2 Paid Items Sold

Total of the number of units of sale for which payment has been made, in each of the 4 time periods.

### .11.4.3 Pending Payment Items Sold

Total of all the number of units of sale for which payment has not been received in each of the 4 time periods.

## .11.5 Orders Pending

### .11.5.1 Waiting Payment

Concerned only with today, reports the status of orders which have been completed but not yet paid for.

### .11.5.2 Waiting Approval

Reports the status of orders which have been submitted by customers but for whatever reason have not yet been approved.

### .11.5.3 Waiting Completion

Reports the status of orders which have been approved but not yet processed through the system yet.

## .11.6 Status Changes

### .11.6.1 Ordered

Reports the number of orders which remain at the Ordered status level since their creation, whether that be today, a week ago, a month ago, or a year ago.

### .11.6.2 Approved

Reports the number of orders which still remain at the Approved status level since their Approval, whether that be today, a week ago, a month ago, or a year ago.

### .11.6.3 Completed

Reports the number of orders which have been completed since their creation, for today, a week ago, a month ago, and a year ago.

### .11.6.4 Cancelled

Any orders whose status was changed to Cancelled are reported here for the 4 time periods.

### .11.6.5 Rejected

Total of Rejected orders for each of the 4 time periods.

# .12 Reports

## .12.1 OrderPurchaseReportOptions

OPEN FOR BUSINESS
OFBiz.org

Welcome THE ADMINISTRATOR!
2005-11-28 06:30:11.281
English (United States) | Set



# Order Reports

## Sales by Store Report

Product Store: - Any -
To Party Id:
OrderOrderStatus: - Any -
From Date:
Thru Date:
Run

## Purchases by Organization Report

From Party: - Any -
To Party: [MARKETING]
OrderOrderStatus: - Any -
From Date:
Thru Date:
Run

## Purchases by Product Report

Product Store: - Any -
Order Type: - Any -
Origin Facility: - Any -
Terminal ID:
Order Status: Completed
From Date (orderDate>=):
Thru Date (orderDate<):
Run Product Report

## Purchases by Payment Method Report

Product Store: - Any -
Order Type: - Any -
Origin Facility: - Any -
Terminal ID:
Order Status: Completed
From Date (orderDate>=):
Thru Date (orderDate<):
Run Payment Report

W3C CSS | W3C XHTML 1.0



Enter your parameters then select which Report you wish to [Run] by clicking that link.

## .12.2 link buttons

[Run] [RunProductReport] [RunPaymentReport]

## .12.3 Sales by Store Report

### .12.3.1 Product Store (drop-down box)

Let the report be for Any (meaning All), or select a specific store from the drop-down box.

### .12.3.2 To Party ID (popup search tool)

Leave blank to report on all sales, or identify an ordering Party using the popup search tool.

### .12.3.3 Order Status (drop-down box)

Leave blank or choose ~~Any~~ unless you wish to restrict the report to a specific status level.

Select from one of the follow Status levels:

- Any
- Created
- Sent
- Processing
- Approved
- Completed
- Rejected
- Cancelled

### .12.3.4 From Date (popup calendar)

Limit the report to orders of the selected status as of this date forward.

### .12.3.5 Thru Date (popup calendar)

Limit the report to orders of the selected status no later than this date and before.

### .12.3.6 Sample Sales by Store Report

Sales by Store Report

Order Status: Any

| Store ID | Product | Qty Sold | Value Sold |
|---|---|---|---|
| 9000 | Big Gizmo (GZ-8544) | 1 | 269.99 |
| 9000 | Micro Chrome Widget (WG-1111) | 8 | 359.94 |
| 9000 | Open Gizmo (LGPL) (GZ-1006-1) | 4 | 7.96 |
| 9000 | Rainbow Gizmo (GZ-1004) | 1 | 25.99 |
| 9000 | Round Gizmo (GZ-2644) | 2 | 38.4 |
| 9000 | Square Gizmo (GZ-2002) | 1 | 47.99 |

This report was quickly generated without limiting parameters.

## .12.4 Purchases by Organization Report

### .12.4.1 From Party (drop-down box)

Select from an established Vendor on the list.

### .12.4.2 To Party (drop-down box)

Select which department or group within the company which would have made the purchases.

### .12.4.3 Order Status (drop-down box)

Leave blank or choose ~~Any~~ unless you wish to restrict the report to a specific status level.

Select from one of the follow Status levels:

- Any
- Created
- Sent

- Processing
- Approved
- Completed
- Rejected
- Cancelled

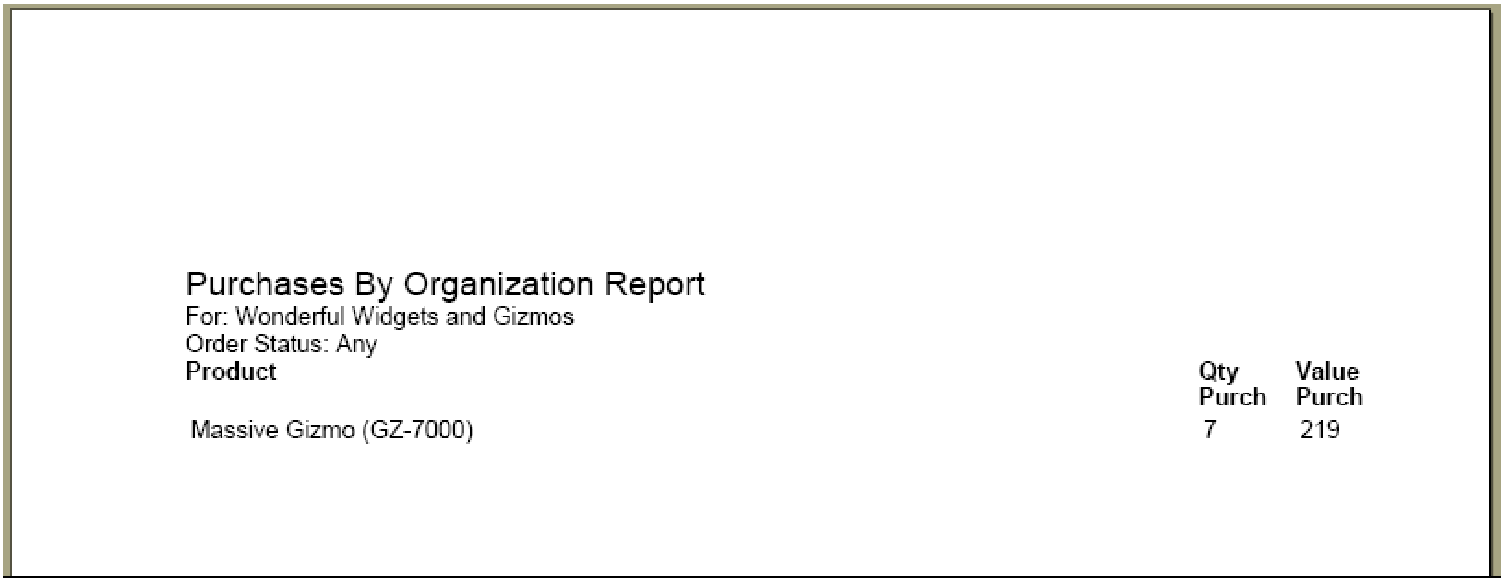
### .12.4.4 From Date (popup calendar)

Limit the report to orders of the selected status as of this date forward.

### .12.4.5 Thru Date (popup calendar)

Limit the report to orders of the selected status no later than this date and before.

### .12.4.6 Sample Purchases by Organization Report


Purchases By Organization Report
For: Wonderful Widgets and Gizmos
Order Status: Any

| Product | Qty Purch | Value Purch |
|---|---|---|
| Massive Gizmo (GZ-7000) | 7 | 219 |

Sample report of product purchased by the company. Note that the total value is not shown.

## .12.5 Purchases by Product Report

### .12.5.1 Product Store (drop-down box)

Select from any of the Stores you maintain with OFBiz.

## .12.5.2 Order Type (drop-down box)

Is this report for Purchase Orders or Sales Orders? Select from the drop-down box.

## .12.5.3 Origin Facility (drop-down box)

Which facility did the order come through - a call center, the warehouse, the retail store, an ecommerce site, etc.

## .12.5.4 Terminal ID

If you want to limit the report to one particular Terminal (register, sales agent, etc.), specify that here by ID.

## .12.5.5 Order Status (drop-down box)

Leave blank or choose ~~Any~~ unless you wish to restrict the report to a specific status level.

Select from one of the follow Status levels:

- Any
- Created
- Sent
- Processing
- Approved
- Completed
- Rejected
- Cancelled

## .12.5.6 From Date (popup calendar)

orderDate>= means that the Order Date is greater than or equal to the Date selected with the popup calendar.

## .12.5.7 Thru Date (popup calendar)

orderDate< means that the Order Date is before the date selected with the popup calendar.

## .12.5.8 Sample Purchases by Product Report

Purchase by Product Summary

| Store ID | Facility ID | Terminal ID | Status ID | Product ID | Product Name | Qty | Qty Cncld |
|---|---|---|---|---|---|---|---|
| 9000 | | | ORDER_C | GZ-1006-1 | Open Gizmo (LGPL) | 5 | 1 |
| 9000 | | | ORDER_A | GZ-1006-1 | Open Gizmo (LGPL) | 1 | |
| 9000 | | | ORDER_C | GZ-2002 | Square Gizmo | 1 | |
| 9000 | | | ORDER_C | GZ-2002 | Square Gizmo | 2 | |
| 9000 | | | ORDER_A | GZ-2002 | Square Gizmo | 1 | |
| 9000 | | | ORDER_C | GZ-2644 | Round Gizmo | 1 | |
| 9000 | | | ORDER_C | GZ-2644 | Round Gizmo | 1 | |
| 9000 | | | ORDER_A | GZ-2644 | Round Gizmo | 1 | |
| 9000 | | | ORDER_A | GZ-5005 | Purple Gizmo | 2 | |
| 9000 | | | ORDER_A | GZ-7000 | Massive Gizmo | 1 | |
| 9000 | | | ORDER_C | GZ-8544 | Big Gizmo | 2 | |
| 9000 | | | ORDER_C | WG-1111 | Micro Chrome Widget | 1 | |
| 9000 | | | ORDER_C | WG-1111 | Micro Chrome Widget | 3 | 1 |
| 9000 | | | ORDER_C | WG-5569 | Tiny Chrome Widget | 2 | |
| 9000 | | | ORDER_C | WG-5569 | Tiny Chrome Widget | 1 | |
| 9000 | | | ORDER_C | WG-9943-S3 | Giant Widget S3 | 1 | |

All of the Orders matching the selected Parameters are reported in this generated PDF format.

## .12.6 Purchases by Payment Method Report

### .12.6.1 Product Store (drop-down box)

Select from any of the Stores you maintain with OFBiz.

### .12.6.2 Order Type (drop-down box)

Is this report for Purchase Orders or Sales Orders? Select from the drop-down box.

### .12.6.3 Origin Facility (drop-down box)

Which facility did the order come through - a call center, the warehouse, the retail store, an ecommerce site, etc.

## .12.6.4 Terminal ID

If you wished to limit the report to one particular Terminal (register, sales agent, etc.), specify that here by ID.

## .12.6.5 Order Status (drop-down box)

Leave blank or choose ~~Any~~ unless you wish to restrict the report to a specific status level.

Select from one of the follow Status levels:

- Any
- Created
- Sent
- Processing
- Approved
- Completed
- Rejected
- Cancelled

## .12.6.6 From Date (popup Calendar)

orderDate>= means that the Order Date is greater than or equal to the Date selected with the popup calendar.

## .12.6.7 Thru Date (popup Calendar)

orderDate< means that the Order Date is before the date selected with the popup calendar.

## .12.6.8 Sample Purchases by Payment Method Report

Purchase by Product Summary

| Store ID | Facility ID | Terminal ID | Status ID | Payment Method | Amount |
|---|---|---|---|---|---|
| 9000 | | | ORDER_COMPLETED | Credit Card | |
| 9000 | | | ORDER_APPROVED | Credit Card | |
| 9000 | | | ORDER_COMPLETED | Offline Payment | |
| 9000 | | | ORDER_COMPLETED | Offline Payment | |

Since no money actually was received, the amount remains empty in this demo.

# **Chapter 8:** Facility Manager

## 1 Main

### .1.0 Main

The Main tab for this facility is not currently active.

### .1.1 View Calendar link button

[View Calendar] when encountered in this application takes you to the WorkEffort Manager application calendar.

## 2 Facilities

## 2.01 Introduction

### .2.1.1 Basic unit of the business

The facility is the basic unit of the business. It controls a range of things. Particularly Inventory configuration which is then per catalog. We only support one inventory facility at this time. You must create a 'Facility' in which to hold inventory before you can record and adjust inventory levels properly. This will be referenced in the Catalog build and can be added at any time.

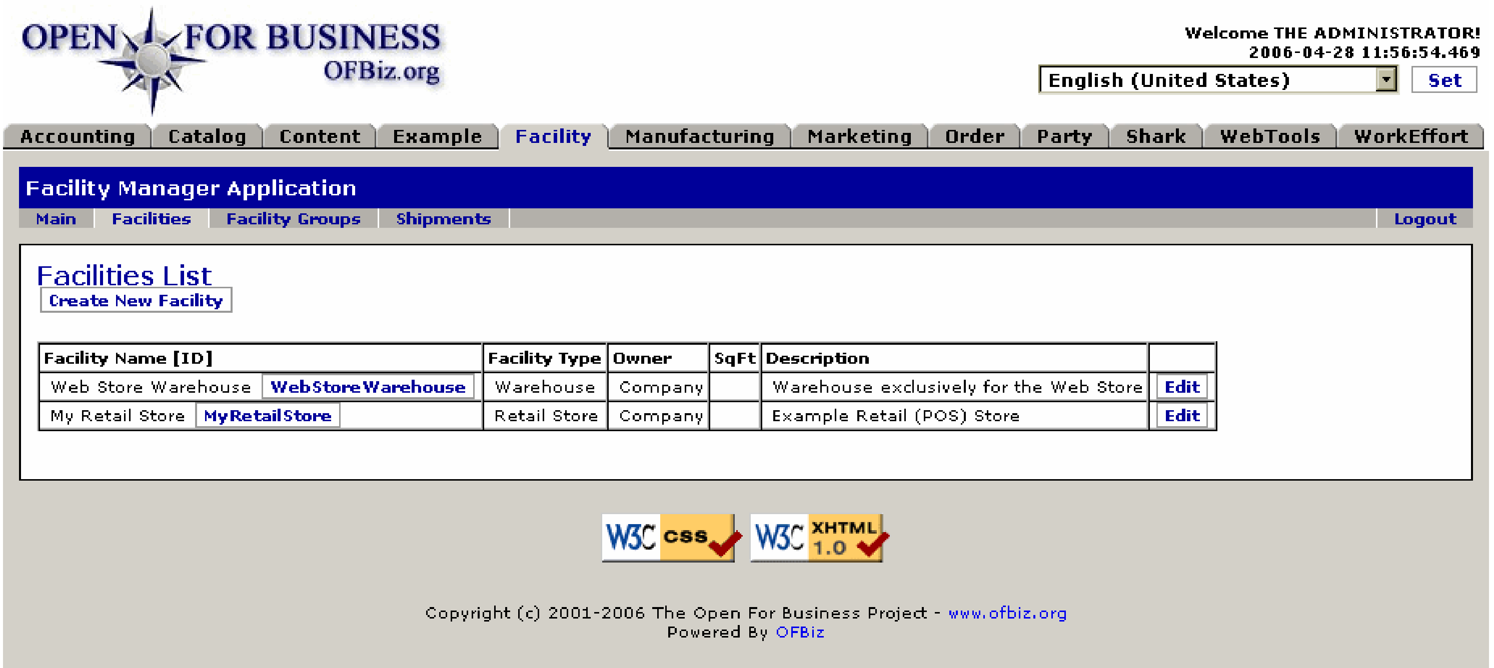
### .2.1.2 Begin your business

The first thing to create is a Facility (as this is where the products will be drawn from). As each Facility is created, it will appear in the Facilities List Table which is like an index, presented by default upon opening the Facility Manager.

Note that there will be more than one Facility in most cases. One might be your virtual store, the e-commerce website where product info is presented and customers make their purchases. Another might be your warehouse/shipping facility where products are received, inventoried and shipped out. Another could be your physical administration offices where employees maintain the business. All are established (for the sake of relationships and functions) electronically here through the Facility Manager.

## .2.1.3 Facilities List table

### .2.1.3.1 main




The Main tab or opening screen in the Facility Manager takes you to this Facilities List. Click on an [ID] or on [Edit].

### .2.1.3.2 link buttons

[Create New Facility] [Edit]

### .2.1.3.3 Facility Name / ID

Click on the associated [Edit] link button or on the (ID) of the facility within the table to be taken directly to the Edit screen populated with data about that facility.

### .2.1.3.4 Facility Type

Is the Facility a Warehouse, a Retail Store, a Hotel, a Rental Agency, etc.

### .2.1.3.5 Owner

Who 'owns' the Facility. This would typically be a matter of responsibility rather than financial possession. For example, assume that those responsible for handling the computers and all electronic aspects of the ecommerce

business had their own building and organization. This WebSite processing unit could be 'owned' by the IT Department, while the Warehouse Facility and the Retail Store would each be a top-level entity under the Company itself.

### .2.1.3.6 SqFt

How large in floor surface area is the physical facility itself.

### .2.1.3.7 Description

What is the purpose, function or activity of this facility?

## 2.02 Create a New Facility

### .2.2.1 EditFacility-New


Creating a new Facility. The name will be associated with a numerical ID; a different name can be edited in later, if needed.

## .2.2.2 link buttons

[New Facility] [Update]

## .2.2.3 First step - identify a Facility

Select the type of Facility, give it a name, declare the owner and the Default Inventory Type, specify the amount of area (in square feet at the moment) and give it a description. The only mandatory fields here are the Facility Type and Name.

Once you have pressed [Update] you are taken to the Facilities tab with the newly-created Facility ready to edit in the Edit Facility screen.

## .2.2.4 Facility Type ID (drop-down box)

Types of Facility might include:

- —
- Building
- Floor
- Office
- Call Center
- Plant
- Room
- Retail Store
- Warehouse

## .2.2.5 Owner (drop-down box)

Select the Owner from the drop-down box. Typical choices might be:

- —
- MARKETING
- ACCOUNTING
- SALES
- DEV
- TESTING
- Company

## .2.2.6 Default Weight Unit (drop-down box)

If needed, specify the weight unit inventory might be measured in. For example, if the facility is a sand and gravel producer, you could specify pounds or tons.

## .2.2.7 Default Inventory Item Type (drop-down box)

Selections might include:

- Serialized
- Non-Serialized

## .2.2.8 Name

Whatever name you place here does NOT become the Facility ID; that is created by the system. You can edit this Name later and give the store another name.

## .2.2.9 Square Footage

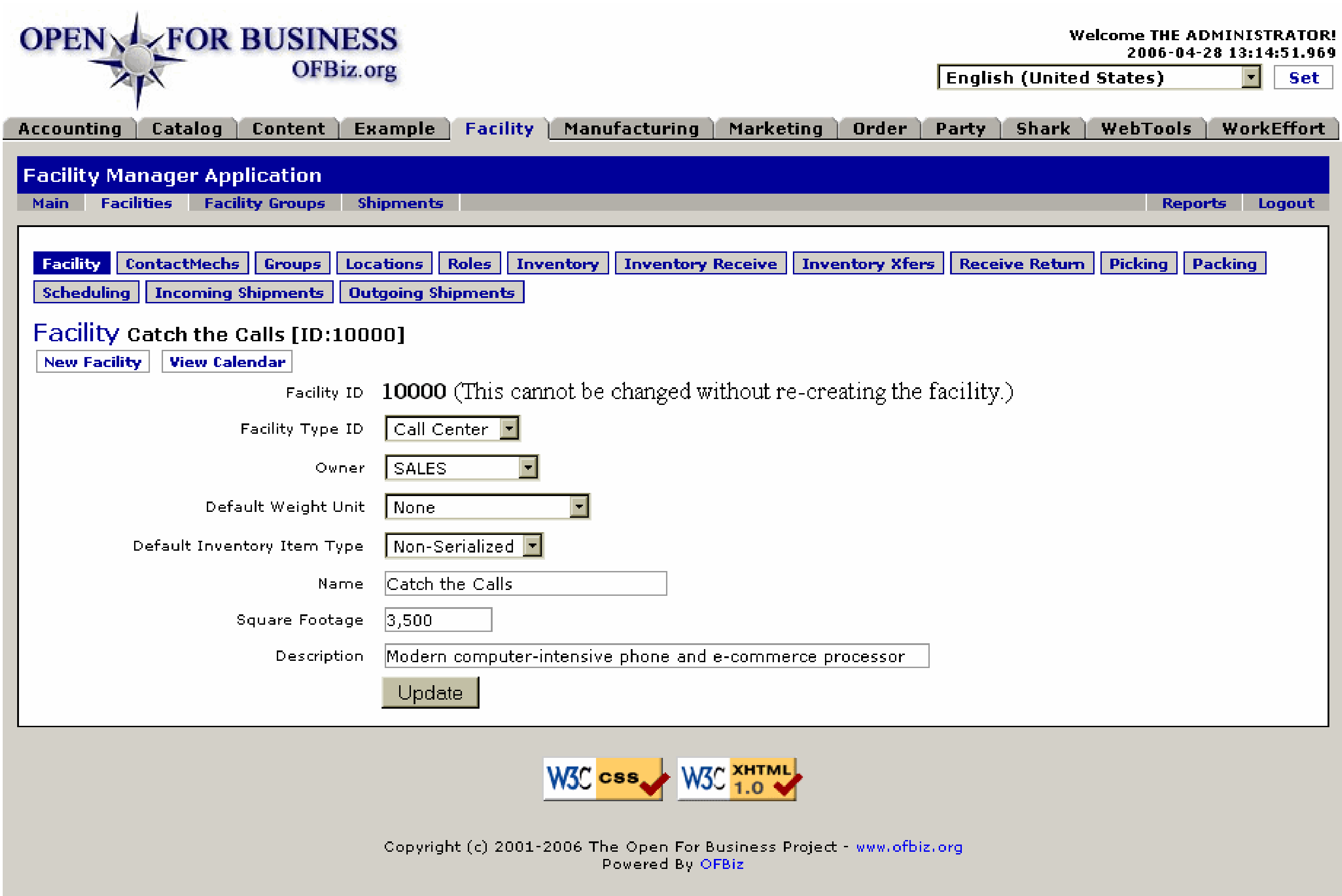
What is the floor area of the facility?

## .2.2.10 Description

Explain the purpose, function or role of this Facility.

## 2.03 Facility tab

### .2.3.1 EditFacility




Upon creating a new Facility or selecting an existing one, you come to this screen. Each sub-tab carries through the selected ID.

### .2.3.2 link buttons

[New Facility] [View Calendar] [Update] [Facility] [ContactMechs] [Groups] [Locations] [Roles] [Inventory] [Inventory Receive] [Inventory Xfers] [Receive Return] [Picking] [Packing] [Scheduling] [Incoming Shipments] [Outgoing Shipments]

### .2.3.3 Facility ID

This is the ID by which the facility is managed within OFBiz. The ID was established in the Create New screen; it cannot be changed. You can name the facility whatever you wish and change that as needed in the Name field.

## .2.3.4 Facility Type ID (drop-down box)

Types of Facility might include:

- —
- Building
- Floor
- Office
- Call Center
- Plant
- Room
- Retail Store
- Warehouse

## .2.3.5 Owner (drop-down box)

This would identify the Party or Party Group having management or fiduciary responsibility for the Facility. Assign the Owner from the drop-down box. Typical choices might be:

- —
- MARKETING
- ACCOUNTING
- SALES
- DEV
- TESTING
- Company

## .2.3.6 Default Weight Unit (drop-down box)

If a weight unit type needs to be specified for this Facility, it will be done here.

## .2.3.7 Default Inventory Item Type (drop-down box)

For example, Serialized or Non-Serialized items to be maintained in the warehouse.

## .2.3.8 Name

You can change the Name here at any time.

### .2.3.9 Square Footage

Size of the floor area.

### .2.3.10 Description

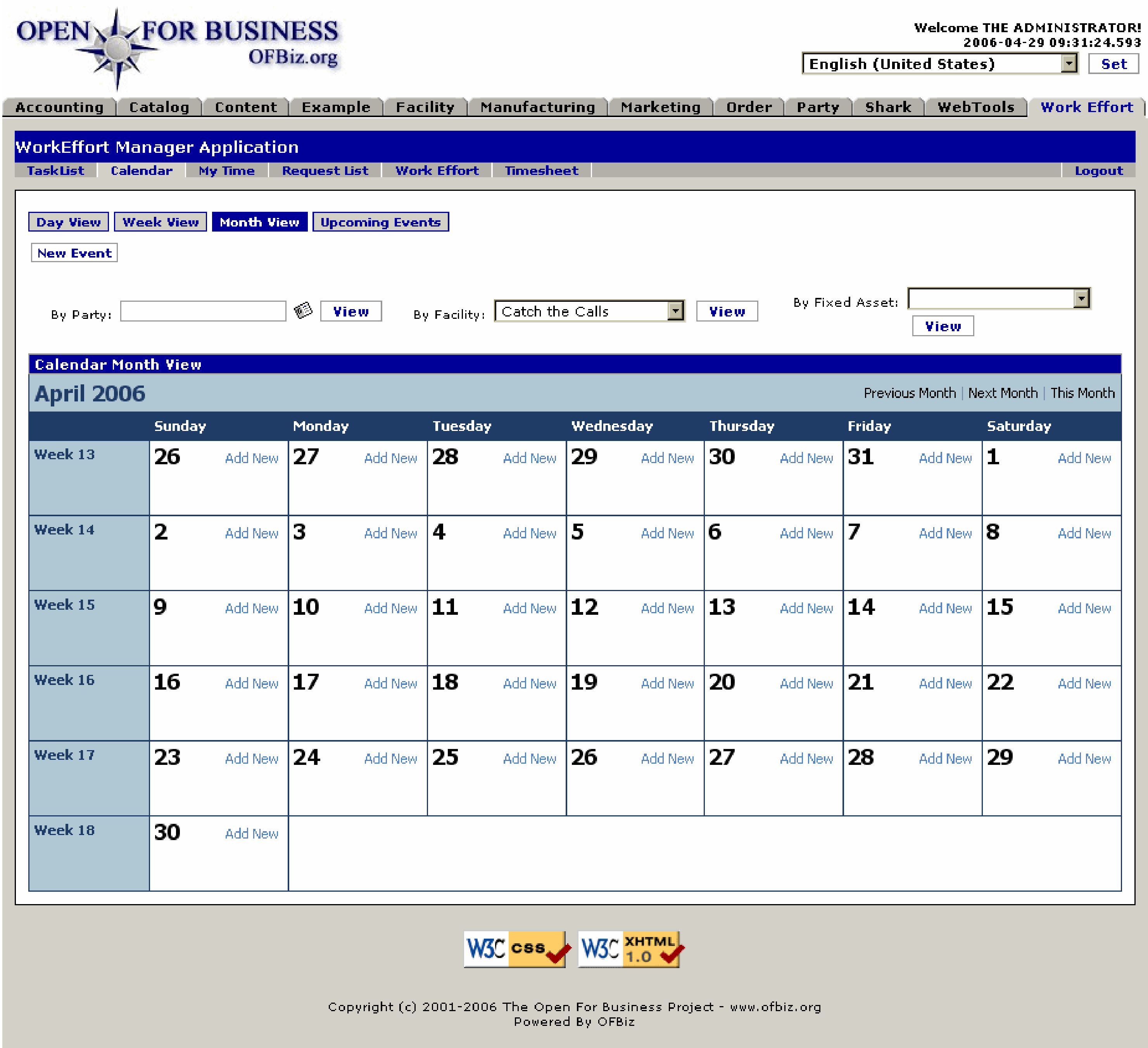
Explain the purpose, function or role of this Facility.

### .2.3.11 View Calendar link

#### .2.3.11.1 Discussion

Clicking on the [View Calendar] link button takes you to the WorkEffort Manager >> Calendar tab with your default presentation of the Month view.

### .2.3.11.2 View Calendar

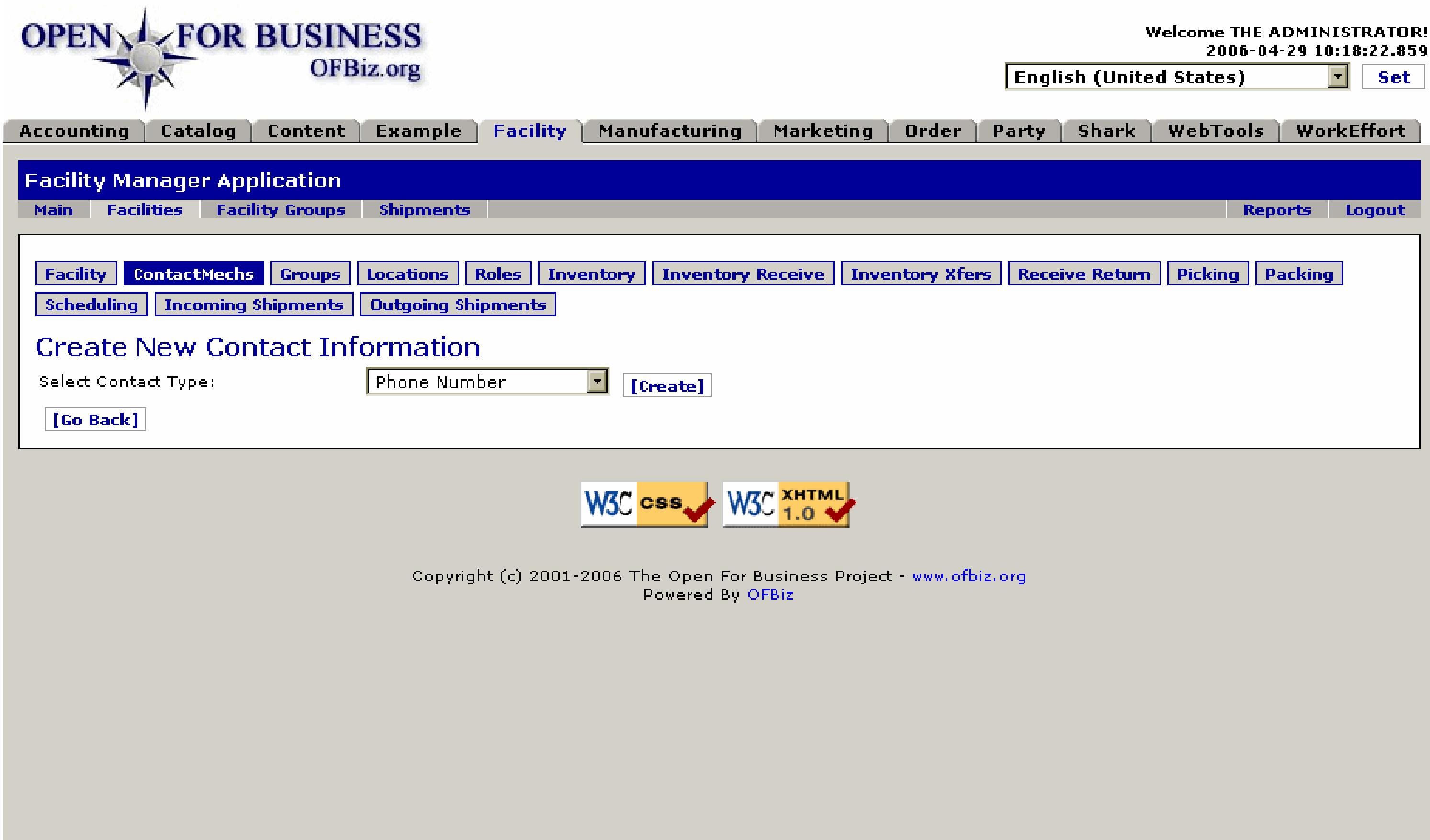



[View Calendar] takes you to the current Month view of the Calendar for this Facility under the Work Effort Manager.

## 2.04 ContactMechs tab

# .2.4.1 New Contact Mechanism

### .2.4.1.1 EditContactMech-new




When creating a new Contact Mechanism, start here with the choice of types of Contact Mechs; then proceed with [Create].

### .2.4.1.2 link buttons

[Go Back] [Create] [Facility] [ContactMechs] [Groups] [Locations] [Roles] [Inventory] [Inventory Receive] [Inventory Xfers] [Receive Return] [Picking] [Packing] [Scheduling] [Incoming Shipments] [Outgoing Shipments]

### .2.4.1.3 Select Contact Type: (drop-down box)

#### .2.4.1.3.1 Choices

These choices can be selected:

- Electronic Address
- Postal Address
- Phone Number
- Email
- Address
- Internet IP Address
- Internet Domain Name
- Web URL/Address

### .2.4.1.3.2 Process

Choose the Type you are associating with this Facility. Note that by repeated processing, you can have one or more Contact Mechanisms of any or all types for your facility. When you click on [Create] you are presented with the screen appropriate to your choice. Each screen is discussed below.

## .2.4.1.4 Electronic Address

### .2.4.1.4.1 EditContactMech-newElect


Tool for creating a new Electronic Address contact mechanism.

### .2.4.1.4.2 link buttons

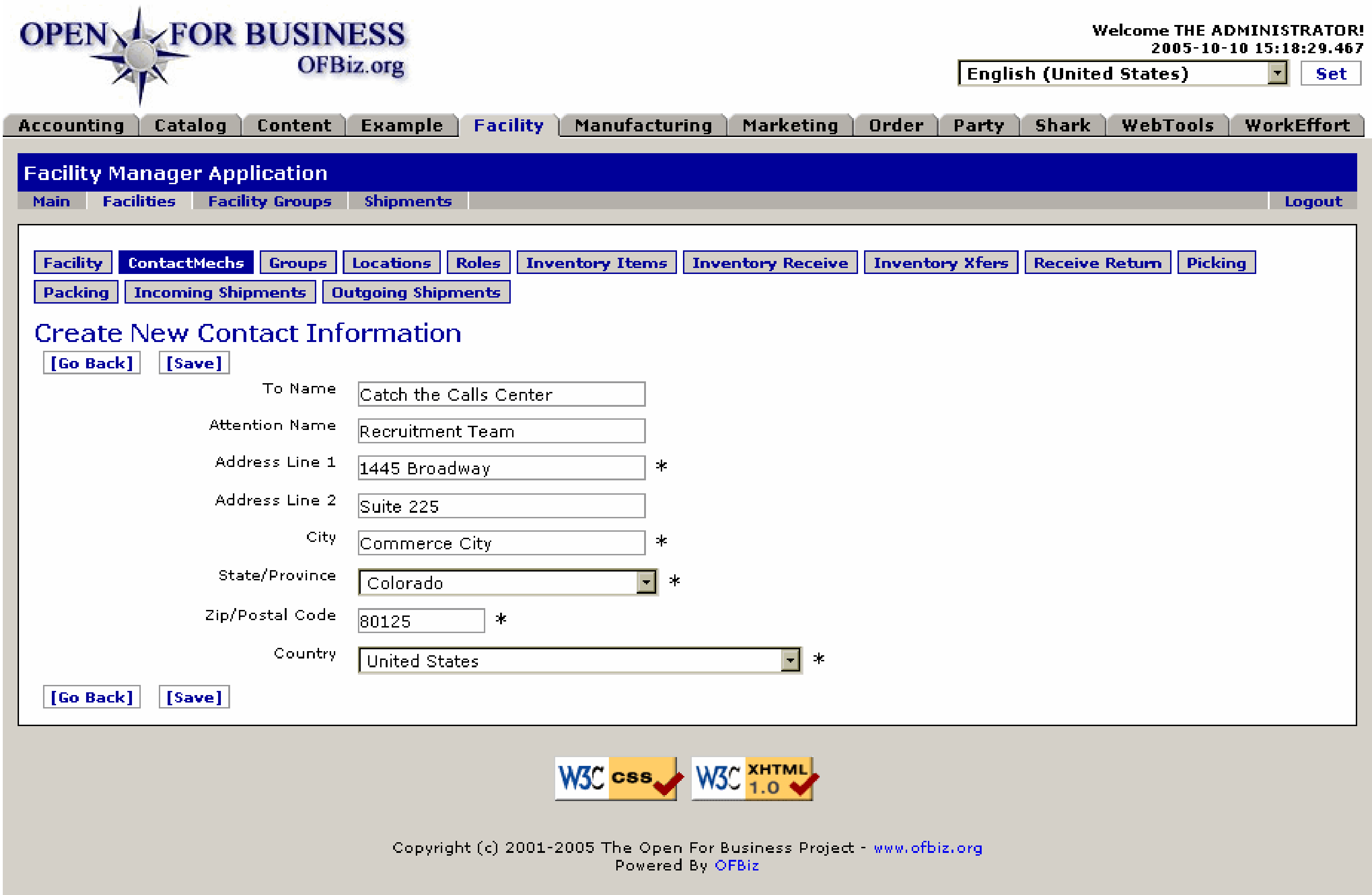
[Go Back] [Save] [Facility] [ContactMechs] [Groups] [Locations] [Roles] [Inventory Items] [Inventory Receive] [Inventory Xfers] [Receive Return] [Picking] [Packing] [Incoming Shipments] [Outgoing Shipments]

### .2.4.1.4.3 Electronic Address *

Enter the new Electronic Address, then press [Save].

## .2.4.1.5 Postal Address

### .2.4.1.5.1 EditContactMech-newPostAddr




Create a new Postal Address contact mechanism for your Facility. Purpose is added after saving.

### .2.4.1.5.2 link buttons

[Go Back] [Save] [Facility] [ContactMechs] [Groups] [Locations] [Roles] [Inventory Items] [Inventory Receive] [Inventory Xfers] [Receive Return] [Picking] [Packing] [Incoming Shipments] [Outgoing Shipments]

### .2.4.1.5.3 To Name

Name of the Facility, organization or group.

### .2.4.1.5.4 Attention Name

Where the mail should be routed within the facility.

### .2.4.1.5.5 Address Line 1 *

The first line of the Postal delivery address.

### .2.4.1.5.6 Address Line 2

The second line of the Postal delivery address.

### .2.4.1.5.7 City *

The community, city, town or geographical center for this Postal address.

### .2.4.1.5.8 State/Province (drop-down box) *

The state or province or greater regional area of the address.

### .2.4.1.5.9 Zip/Postal Code *

Enter the Postal code; this is a required field.

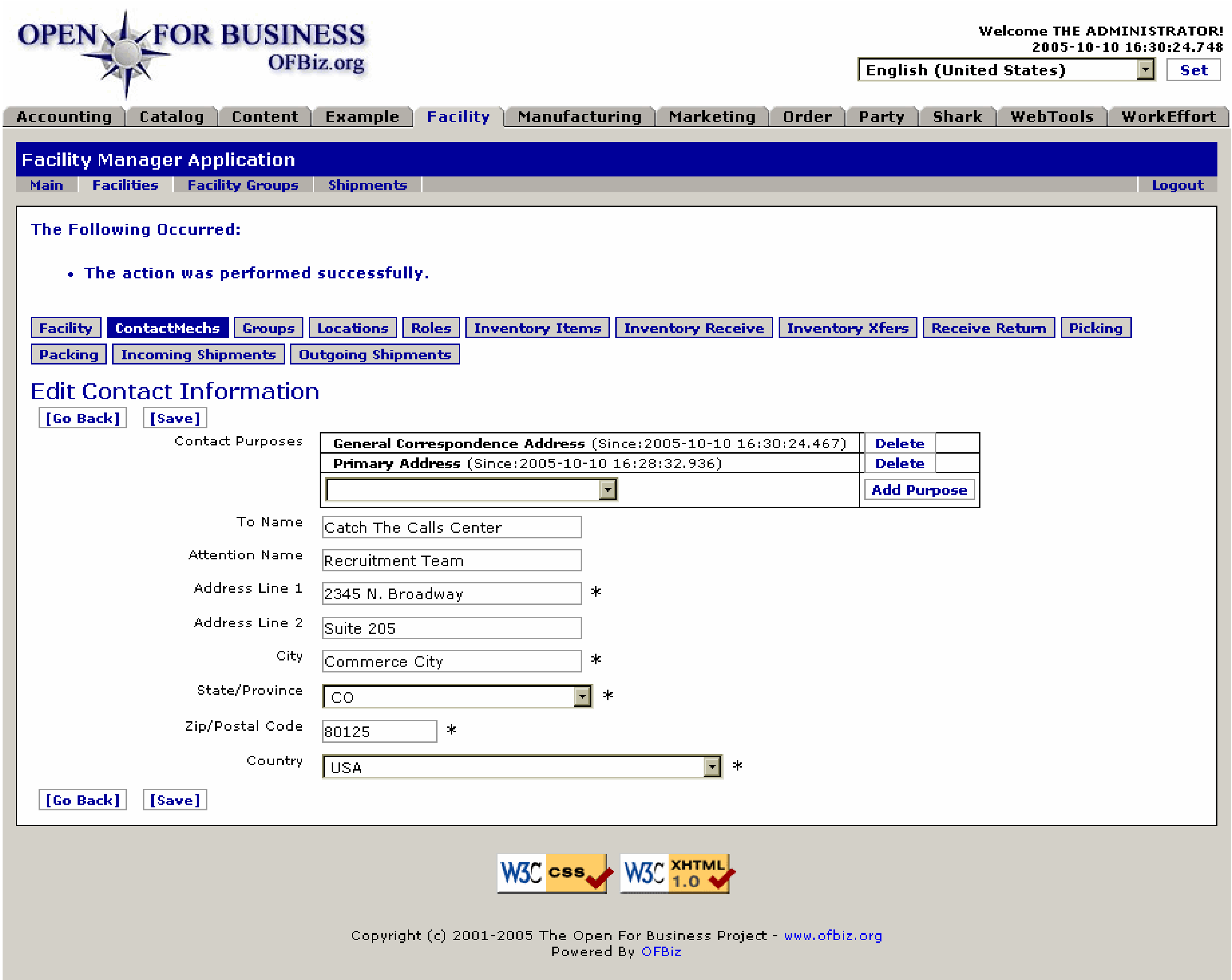
### .2.4.1.5.10 Country (drop-down box) *

Select the country from the drop-down box.

### .2.4.1.5.11 Add Contact Purposes

Upon pressing [Save] you will be presented with the following screen requesting the purposes for which postal contact may be made.

### .2.4.1.5.11.1 createFacilityContactMechPurpose-PostAddr




Add the Contact Purposes to your Postal Address record here. You can also update the other information at the same screen.

### .2.4.1.5.11.2 link buttons

[Add Purpose] [Delete] [Facility] [ContactMechs] [Groups] [Locations] [Roles] [Inventory Items] [Inventory Receive] [Inventory Xfers] [Receive Return] [Picking] [Packing] [Incoming Shipments] [Outgoing Shipments]

### .2.4.1.5.11.3 Contact Purposes (drop-down box)

Purposes might include one of the following:

- Billing (AP) Address
- General Correspondence
- Address

- Payment (AR) Address
- Purchase Return Address
- Shipping Destination Address
- Shipping Origin Address

## .2.4.1.6 Phone Number

### .2.4.1.6.1 EditContactMech-newPhonNum


Creating a new Phone Number record; NOTE: the first box is for the Country code, NOT the Area Code.

### .2.4.1.6.2 link buttons

[Go Back] [Save] [Facility] [ContactMechs] [Groups] [Locations] [Roles] [Inventory Items] [Inventory Receive] [Inventory Xfers] [Receive Return] [Picking] [Packing] [Incoming Shipments] [Outgoing Shipments]

### .2.4.1.6.3 Phone Number *

Important Note: The first box is for the COUNTRY code, NOT for the Area Code - that goes into the next box.

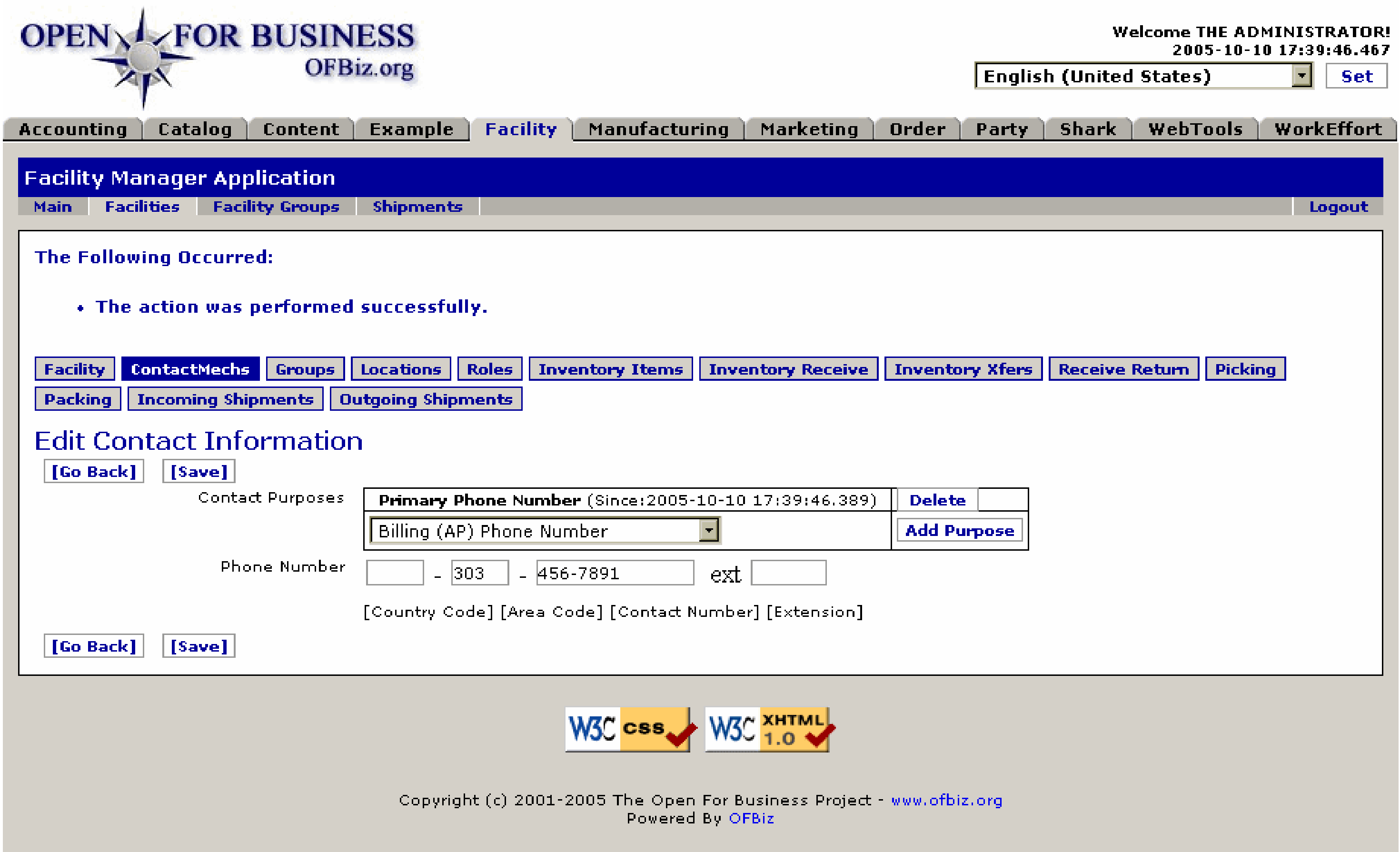
Place all the primary (7) digits into the 3rd box, including the prefix.

The Contact Purpose will be established in the next screen after you [Save] this new phone number.

## .2.4.1.6.4 Add Contact Purposes

Upon pressing [Save] you will be presented with the following screen requesting the purposes for which telephone contact may be made.

### .2.4.1.6.4.1 createTelecomNumber-addPurposes




Part of creating the Phone Number contact - specifying the Contact Purpose(s) from the drop-down box.

### .2.4.1.6.4.2 link buttons

[Add Purpose] [Go Back] [Save] [Facility] [ContactMechs] [Groups] [Locations] [Roles] [Inventory Items] [Inventory Receive] [Inventory Xfers] [Receive Return] [Picking] [Incoming Shipments] [Outgoing Shipments]

### .2.4.1.6.4.3 Contact Purposes (drop-down box)

Purposes could be one of the following:

- Main Fax Number
- Secondary Fax Number
- Billing
- (AP) Phone Number

- Main Home Phone Number
- Main Mobile Phone Number
- Payment (AR)
- Phone Number
- Shipping Destination Phone Number
- Shipping Origin Phone Numbe r
- Main
- Work Phone Number
- Secondary Work Phone Number
- Primary Phone Number

## .2.4.1.7 Email Address

### .2.4.1.7.1 EditContactMech-newEmail


Create the mechanism for e-mail contact at this screen.

### .2.4.1.7.2 link buttons

[Go Back] [Save] [Facility] [ContactMechs] [Groups] [Locations] [Roles] [Inventory Items] [Inventory Receive] [Inventory Xfers] [Receive Return] [Picking] [Packing] [Incoming Shipments] [Outgoing Shipments]

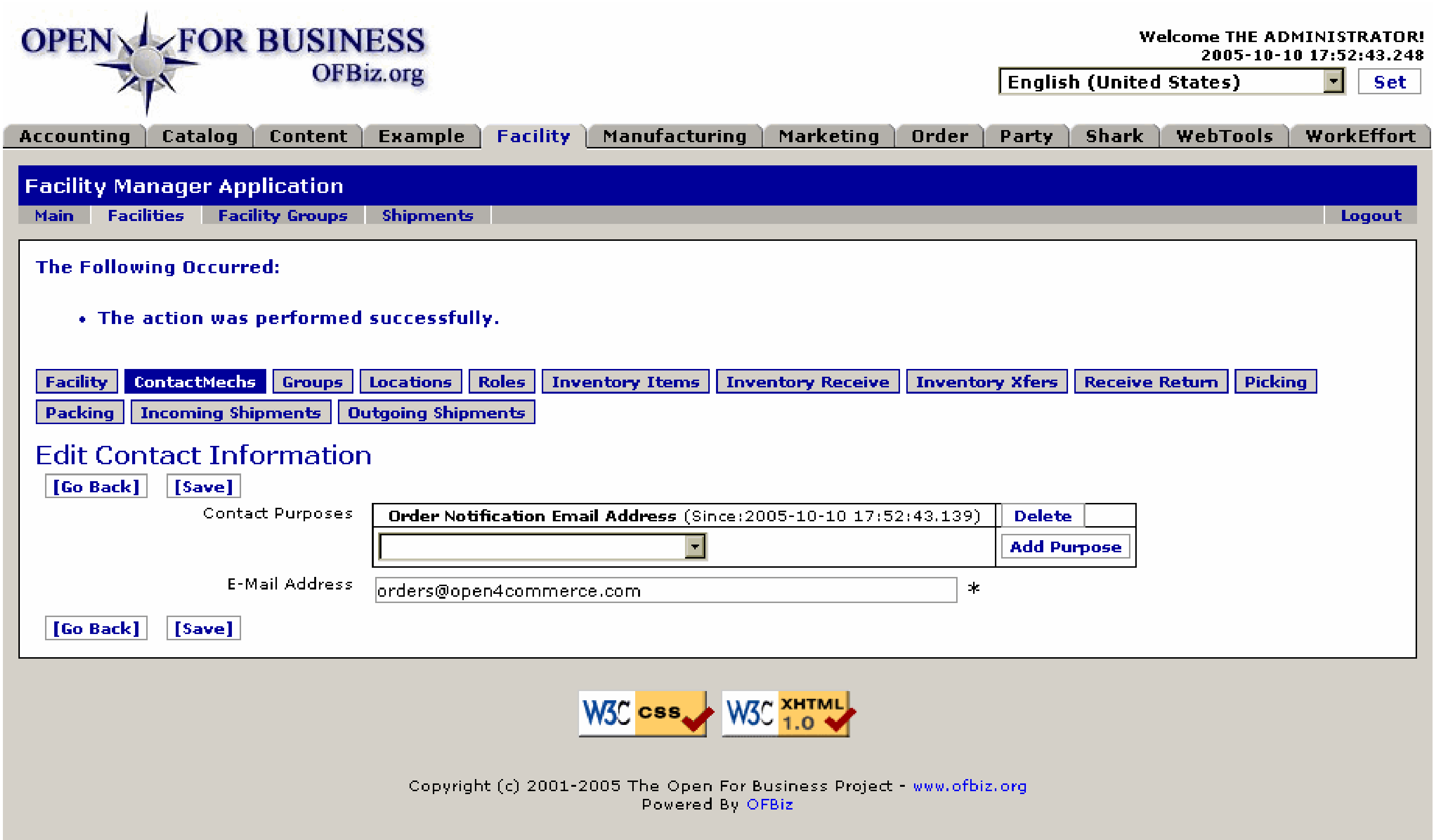
### .2.4.1.7.3 E-Mail Address *

Enter the complete e-mail address here.

## .2.4.1.7.4 Contact Purposes

Upon creation of the new E-Mail contact record, a query window appears asking for the Purpose of the email address with a drop-down box from which to select.

### .2.4.1.7.4.1 createEMailContactMech-addPurpose




Add the Purpose for the e-mail contact mechanism at this screen.

### .2.4.1.7.4.2 link buttons

[Delete] [Add Purpose] [Go Back] [Save] [Facility] [ContactMechs] [Groups] [Locations] [Roles] [Inventory Items] [Inventory Receive] [Inventory Xfers] [Receive Return] [Picking] [Packing] [Incoming Shipments] [Outgoing Shipments]

### .2.4.1.7.4.3 Contact Purposes (drop-down box)

Possible purposes for the email contact might be:

- Order Notification Email Address
- Other Email
- Address
- Primary Email Address

## .2.4.1.8 Internet IP Address

### .2.4.1.8.1 EditContactMech-newInternetIPAdd


Create a new Internet IP Address contact record here.

### .2.4.1.8.2 link buttons

[Go Back] [Save] [Facility] [ContactMechs] [Groups] [Locations] [Roles] [Inventory Items] [Inventory Receive] [Inventory Xfers] [Receive Return] [Picking] [Packing] [Incoming Shipments] [Outgoing Shipments]

### .2.4.1.8.3 Internet IP Address *

Enter this accurately and correctly. Do NOT use asterisks as shown in the screen shot.

## .2.4.1.9 Internet Domain Name

### .2.4.1.9.1 EditContactMech-newDomName


Creating a new contact mechanism for the Internet Domain Name.

### .2.4.1.9.2 link buttons

[Go Back] [Save] [Facility] [ContactMechs] [Groups] [Locations] [Roles] [Inventory Items] [Inventory Receive] [Inventory Xfers] [Receive Return] [Picking] [Packing] [Incoming Shipments] [Outgoing Shipments]

### .2.4.1.9.3 Internet Domain Name *

Enter the full domain name including the extension.

## .2.4.1.10 Web URL/Address

### .2.4.1.10.1 EditContactMech-newWebAdd


Create a new contact mechanism for the Web URL/Address here. Enter the complete address.

### .2.4.1.10.2 link buttons

[Go Back] [Save] [Facility] [ContactMechs] [Groups] [Locations] [Roles] [Inventory Items] [Inventory Receive] [Inventory Xfers] [Receive Return] [Picking] [Incoming Shipments] [Outgoing Shipments]

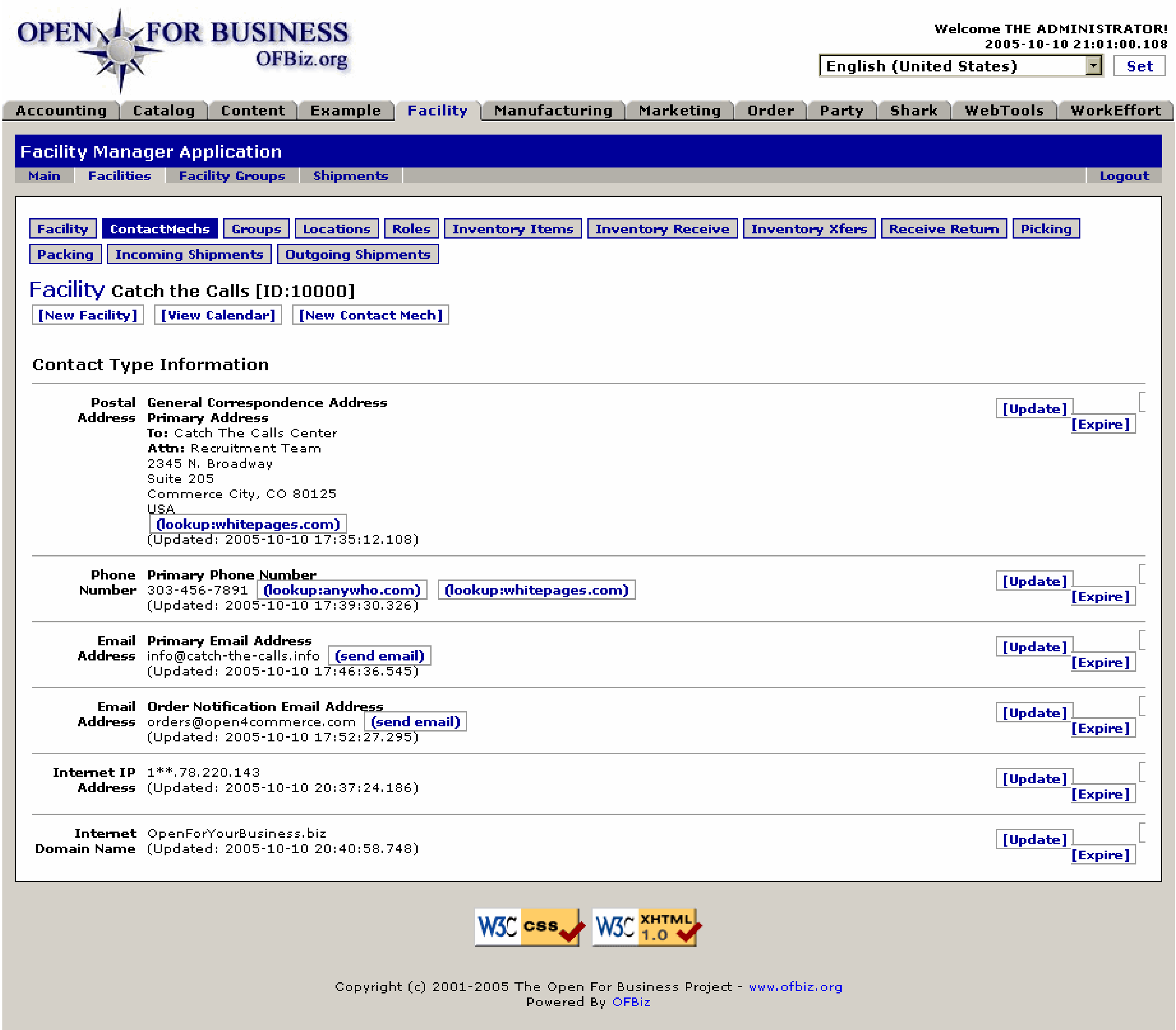
### .2.4.1.10.3 Web URL/Address *

Enter the full address, including the http:// or the https:// portion.

## .2.4.2 View Contact Type Information

The screen presents only the established Contact Mechanisms for the originally-selected Facility.

## .2.4.2.1 ViewContactMechs




List of the existing Contact Mechanism records for the selected Facility. Click on the associated [Update] link to edit.

## .2.4.2.2 link buttons

[New Facility] [View Calendar] [New Contact Mech] [Update] [Expire] [(lookup:whitepages.com)] [(lookup:anywho.com)] [(send email)] [Facility] [ContactMechs] [Groups] [Locations] [Roles] [Inventory] [Inventory Receive] [Inventory Xfers] [Receive Return] [Picking] [Packing] [Scheduling] [Incoming Shipments] [Outgoing Shipments]

### .2.4.2.3 Discussion

All the various contact mechanisms for the selected facility are presented in a list. Each one has the mechanism to [Update] or [Expire] the contact mechanism. 'Expire' removes them from the active list. 'Update' takes you to the editing screen for that particular contact; the contents of this screen are totally dependent upon the type of contact being edited.

See more details about contact mechanisms under the Party Manager.

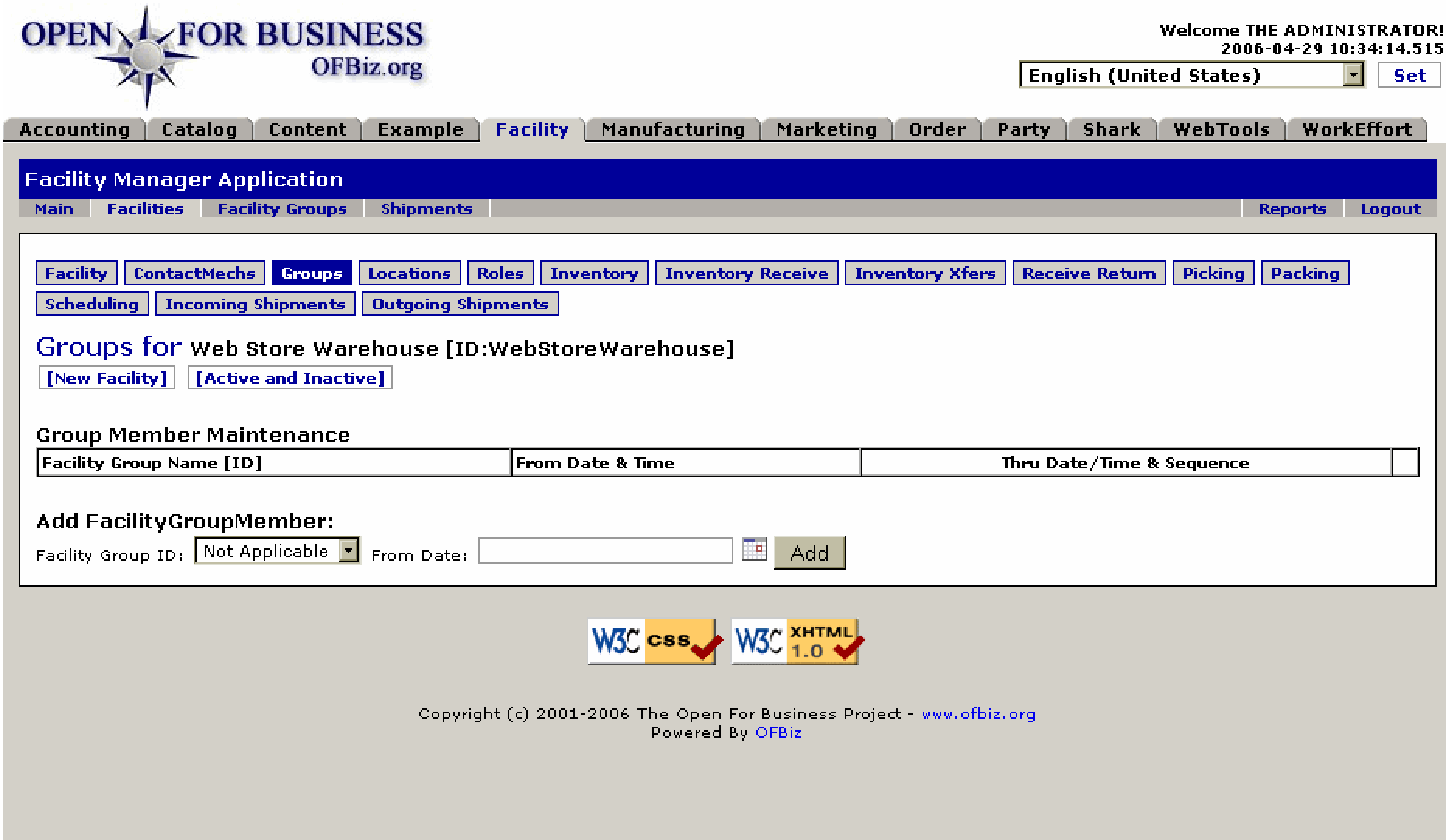
## .2.4.3 Update Contact Mechanism

You are taken to a screen appropriate for editing the particular Contact selected. Screens are essentially the same as the Create New Contact Mechanism screens, discussed above.

# 2.05 Groups tab

## .2.5.1 Create New Facility Group

### .2.5.1.1 createNewFacilityGroup-Step1




Before any Facility Group has been created, click on the [Add] button to start the creation process.

### .2.5.1.2 link buttons

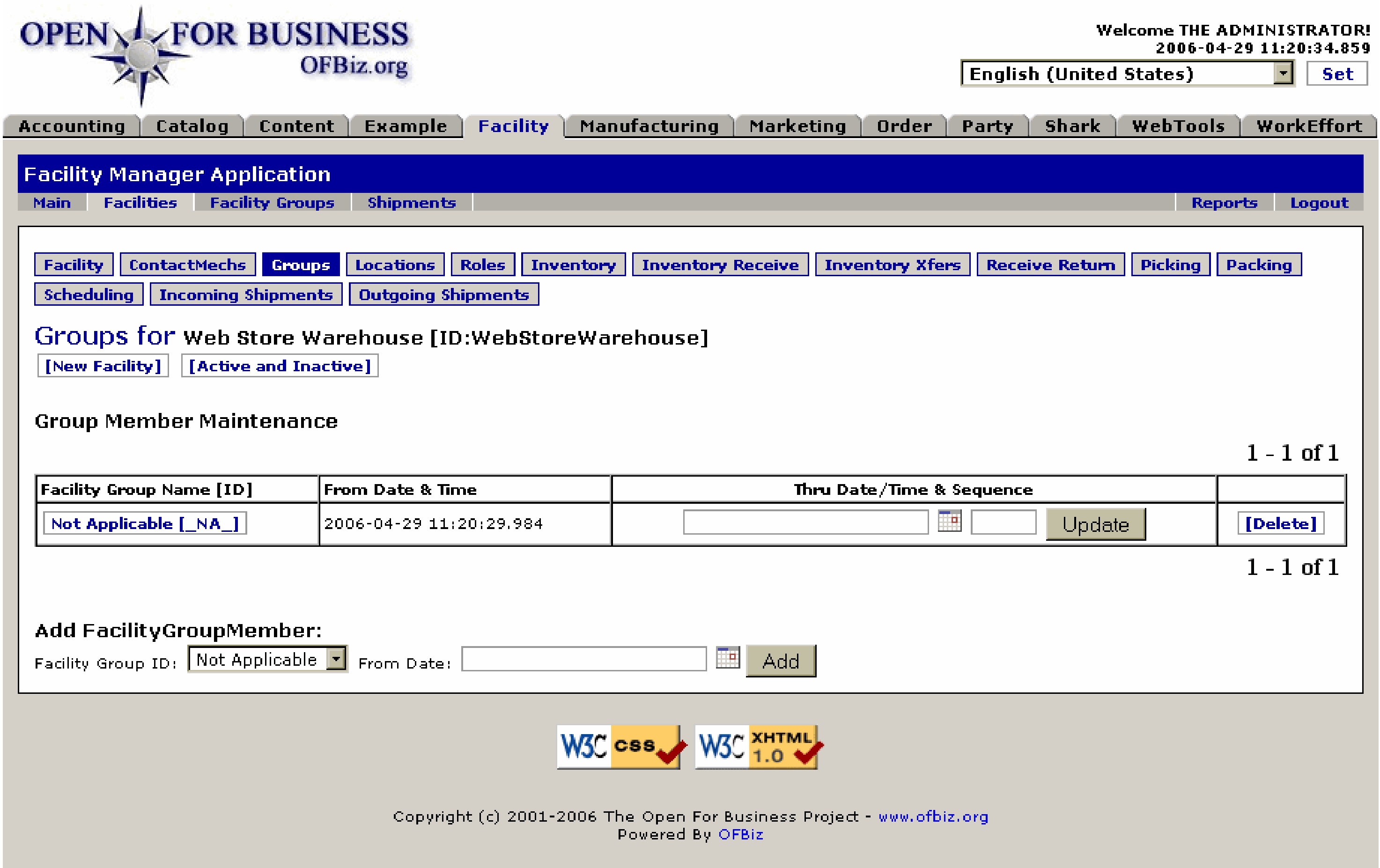
[New Facility] [Active and Inactive (toggle)] [Add] [Facility] [ContactMechs] [Groups] [Locations] [Roles] [Inventory] [Inventory Receive] [Inventory Xfers] [Receive Return] [Picking] [Packing] [Scheduling] [Incoming Shipments] [Outgoing Shipments]

### .2.5.1.3 Discussion

At this point there are no Facility Groups. The Table is described below, under Edit Facility Groups.

To initiate any new Facility Group, click on the [Add] button. That will bring up the following screen where you will get one step closer to creating a new Facility Group.

### .2.5.1.4 createNewFG-Step2

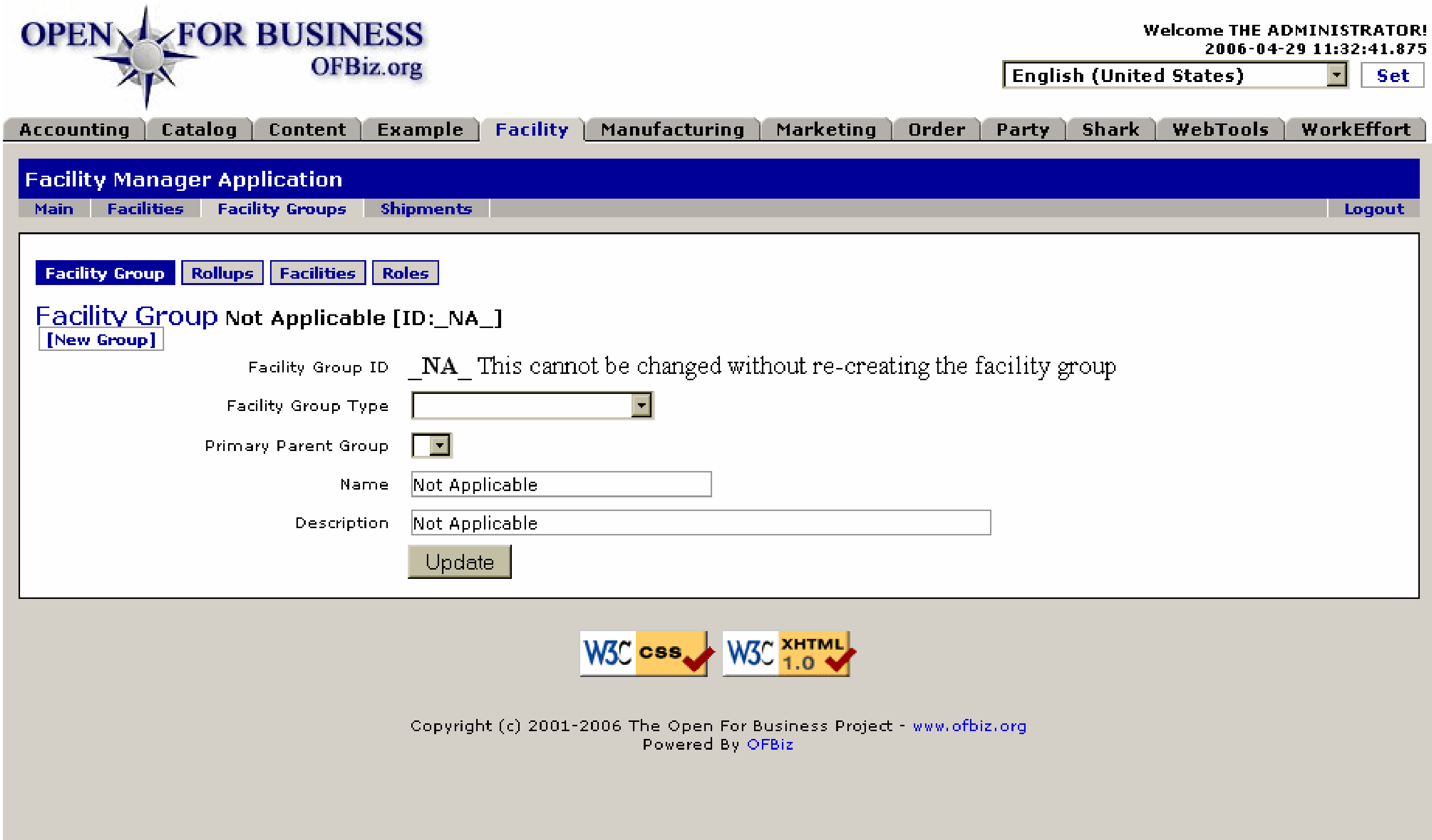



Step 2 is to click on the Facility Group ID that reads "Not Applicable" to bring up the Edit screen which follows.

### .2.5.1.5 Discussion 2

At this point you have added a Facility Group (which you can delete later) temporarily called Not Applicable. To enter the Edit Facility Group working screen, you need to edit a group. Therefore, we will 'Edit' this temporary 'Group' just to take us to that screen, shown below.

## .2.5.1.6 createNewFG-Step3



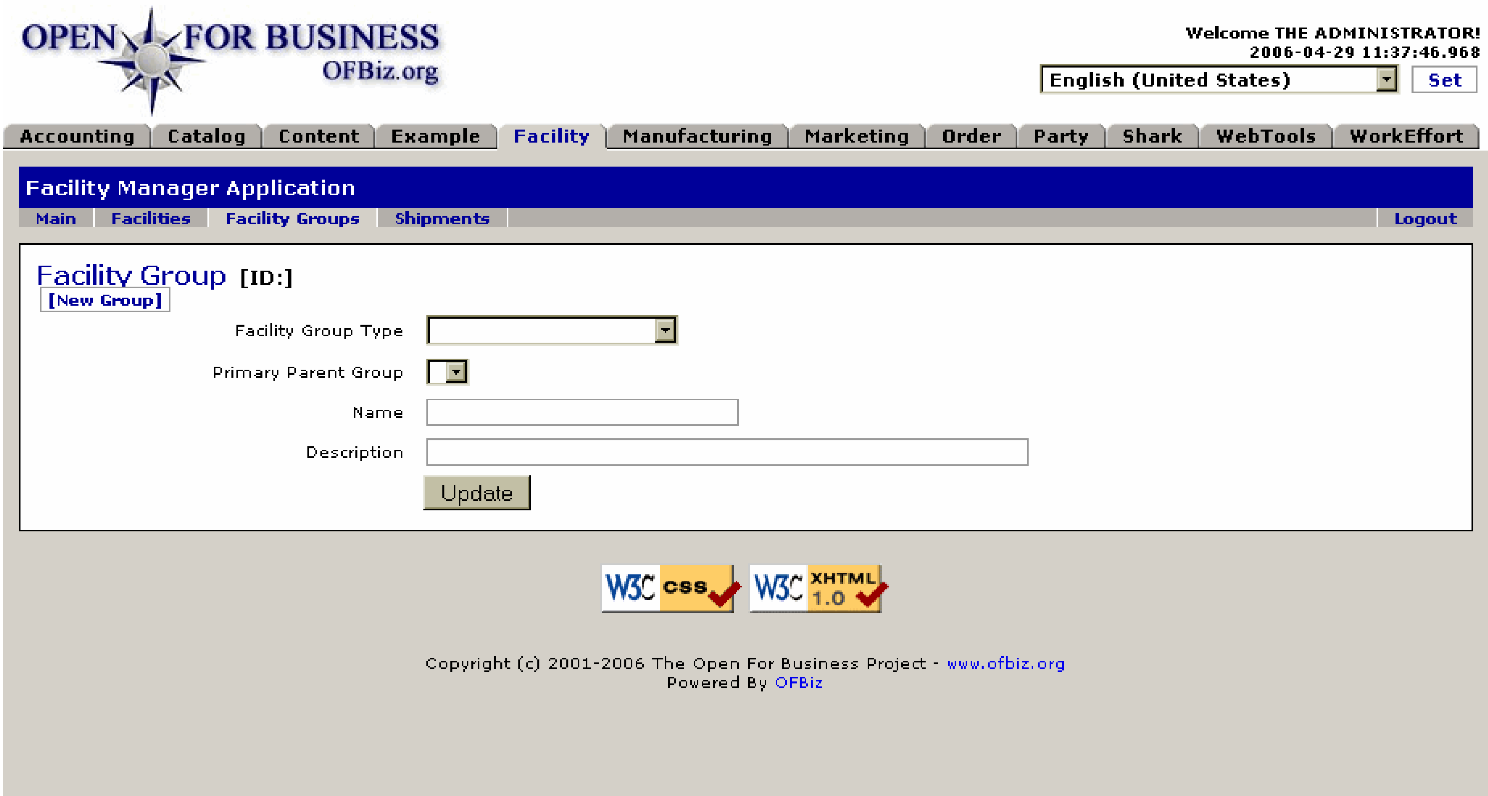

At this screen you are still dealing with the temporary Group; click on [New Group] to continue.

## .2.5.1.7 Discussion 3

Notice that you are still working with 'Not Applicable' which is not really a Group. At this point you need to click the [New Group] link which will finally take you to the correct screen.

You will not need to take this complex path to create other Groups in the future. Once a group has been created for any particular Facility, you will only need to start editing an existing Group, and then click on the [New Group] link.

## .2.5.1.8 EditFacilityGroup-new




Here is where you actually create a new Facility Group. Select Type, give it a Name and a Description, then [Update].

## .2.5.1.9 link buttons

[New Group] [Update]

## .2.5.1.10 Facility Group Type (drop-down box) *

Required field; you cannot leave this blank. Select from one of the existing Types using the drop-down box.

## .2.5.1.11 Primary Parent Group (drop-down box)

This box will be empty until after you have created your first Group; after that, all Groups will be listed, so you can assign the Parent if there is one.

## .2.5.1.12 Name

This can be changed or edited later. Make it distinctive.

#### .2.5.1.13 Description

Provide a brief, succinct description to distinguish the Facility Group from others.

#### .2.5.1.14 Final Step after Creating a Group

Now you must return to the Facilities tab <I> Groups </I> sub-tab. That will bring you to the screen shown below under Group Member Maintenance where you will bring up and add the Groups you have just created here under the Facility Groups tab.

### .2.5.2 Group Member Maintenance

#### .2.5.2.1 Group Member Maintenance

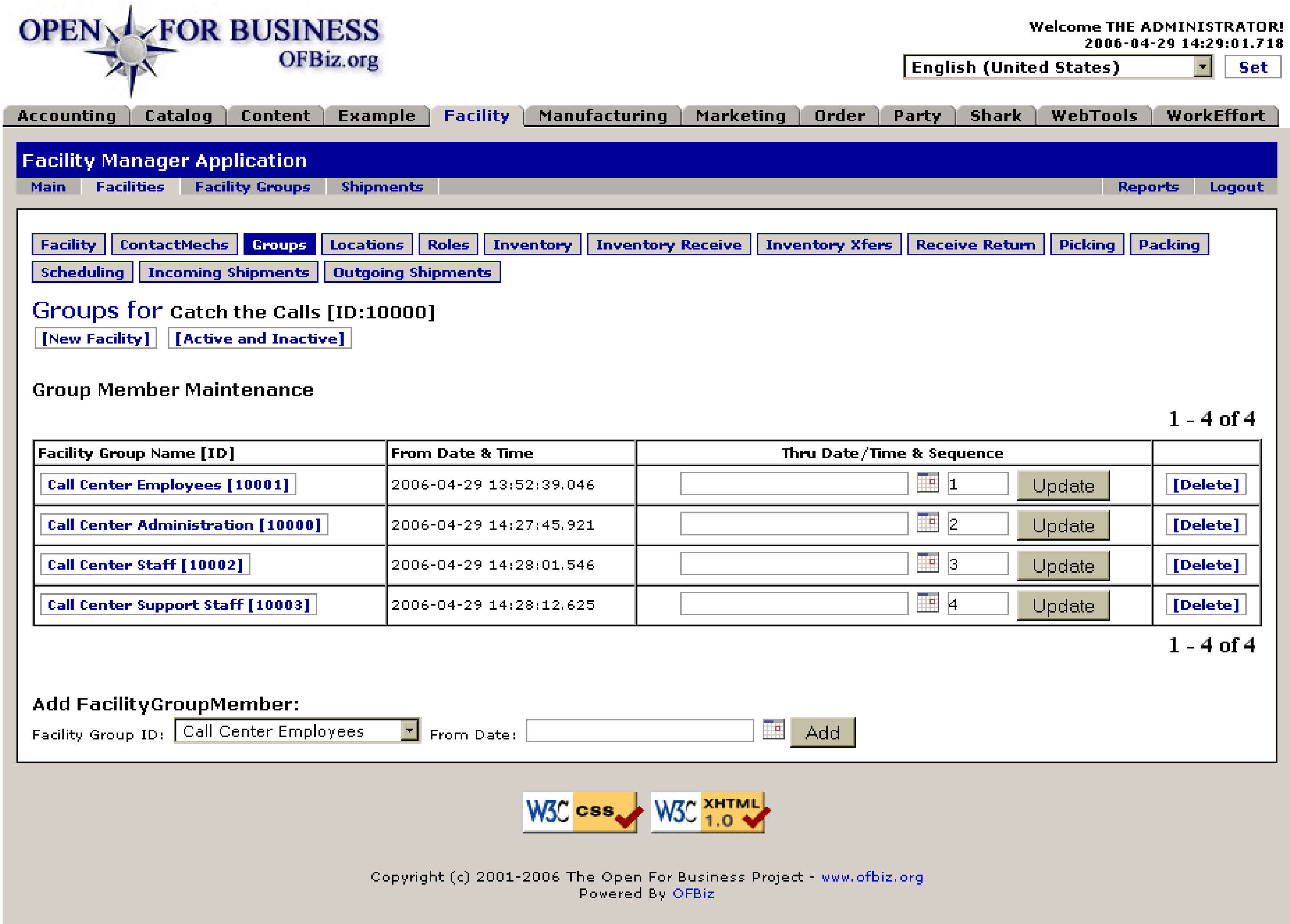
Only those Facility Groups which have already been associated with the selected Facility will be listed in the table.

When you created a new Group (above), it was actually created under the Facility Groups tab. In the steps below we will bring those newly-created Groups under the Facility we are working with.

Clicking on the Facility Group ID or the associated [Edit] button will take you to the major Facility Groups tab (discussed below) with its powerful editing tools. Keep an eye on which major Tab you are working with. If you no longer have the many sub-tabs

shown across the upper main part of your screen, you might need to return to the Facilities working tab and (in the present case) the <I> Groups </I> sub-tab.

## .2.5.2.2 EditFacilityGroups




Create associations of existing Facility Groups with this Facility or select a Group to edit from this screen.

## .2.5.2.3 link buttons

[New Facility] [Active and Inactive (toggle)] [Delete] [Update] [Add] [Facility] [ContactMechs] [Groups] [Locations] [Roles] [Inventory] [Inventory Receive] [Inventory Xfers] [Receive Return] [Picking] [Packing] [Scheduling] [Incoming Shipments] [Outgoing Shipments]

## .2.5.2.4 Facility Group Name (ID)

A click on the Name [ID] takes you to the Facility Groups tab where you can make changes to this particular Group.

### .2.5.2.5 From Date and Time

When the association was created or made effective.

### .2.5.2.6 Thru Date/Time and Sequence

Use the popup calendar. Only specify a Date if you know the Association is to end (expire) at some point. Usually this field will be left blank.

### .2.5.2.7 Sequence

You must specify the Sequence Number if you wish to have a sequencing system among your Groups. Click [Update] if you have made any changes with a Group.

## .2.5.3 Add FacilityGroup Member

Tool for associating Facility Groups with the Facility. The Group must already exist; create new groups under the Facility Groups tab. Once created, they will appear under the drop-down box.

### .2.5.3.1 Facility Group ID (drop-down box)

All existing Facility Groups which could become associated with this Facility are listed in the drop-down box. Select the one you wish to add.

### .2.5.3.2 From Date: (popup calendar)

Default will be the current date and time. Click on [Add] to complete the association.

## .2.5.4 Edit Facility Group Member

### .2.5.4.1 EditFacilityGroup-member


Editing of the Facility Group takes place under the major tab Facility Groups.

### .2.5.4.2 Discussion

When a Facility Group is edited, the process begins with this screen. See the major tab, Facility Groups , for further explanation.

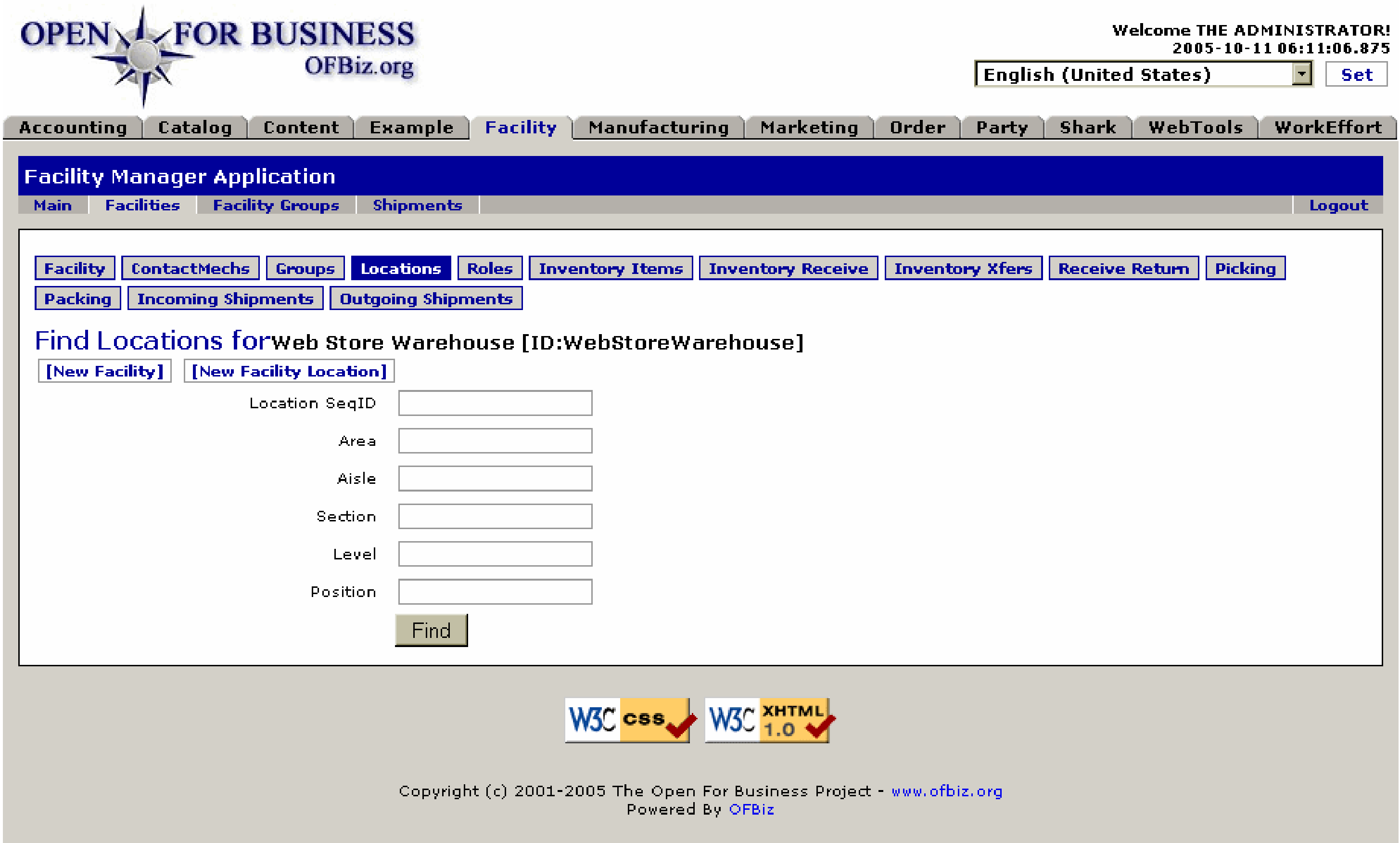
# 2.06 Locations tab

## .2.6.1 Find Existing Location

Use this to find locations for specific facility areas or items. For example: inventory items or shipment pallets received; stock locations for picking; valuable resources such as computers or projectors; office assignments for personnel; vehicle parking assignments in a parking lot, etc.

The terms used here (Area, Aisle, Section, Level, and Position) can be changed by your programmer to match your requirements.

## .2.6.1.1 FindFacilityLocation




Enter known parameters and press [Find]; a table of locations is returned. Press [Find] with no parameters and all are returned.

## .2.6.1.2 link buttons

[New Facility] [New Facility Location] [Find] [Facility] [ContactMechs] [Groups] [Locations] [Roles] [Inventory] [Inventory Receive] [Inventory Xfers] [Receive Return] [Picking] [Packing] [Scheduling] [Incoming Shipments] [Outgoing Shipments]

## .2.6.1.3 Location SeqID

The Location Sequence ID consists of the values for Area, Aisle, Section, Level and Position, all concatenated.

When parameters are left blank, [Find] returns all locations for the selected Facility.

### .2.6.1.4 Area

Which Area of the Facility are you starting from?

### .2.6.1.5 Aisle

Which Aisle within that Area are you searching?

### .2.6.1.6 Section

Which Section of the Aisle is your focus?

### .2.6.1.7 Level

Which Level (of shelving) within that Section is the Position?

### .2.6.1.8 Position

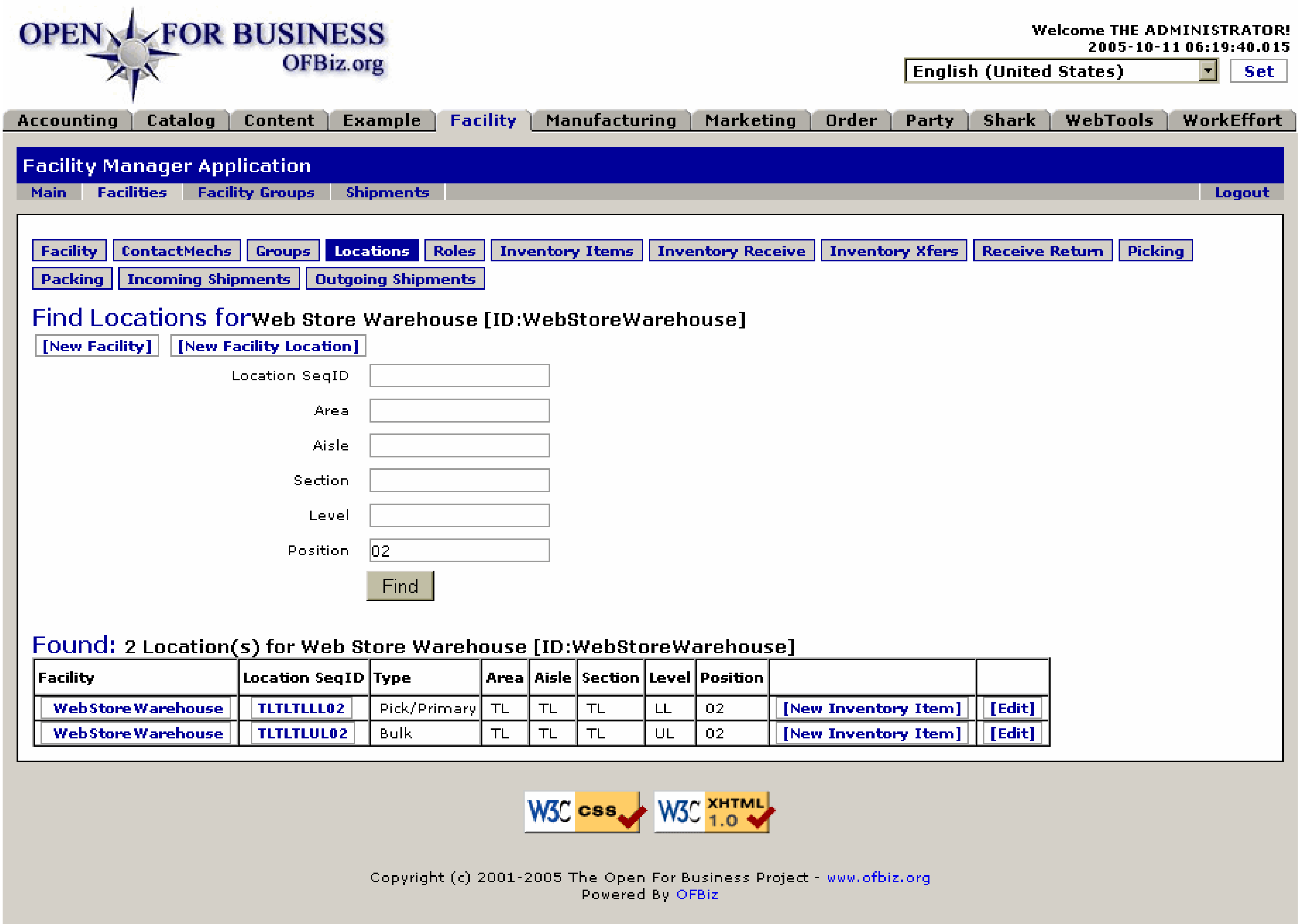
What Position on that Level of this Section is the item located?

### .2.6.1.9 >> Found items screen

When sought items are found, the search screen is expanded to show a table of all the items meeting the parameters entered. Note that this search is for specific physical locations within a facility.

Unless the locations have already been entered for the inventory items, the search will not return valid data. One of the tools for entering location information is discussed below under New Facility Location.

### .2.6.1.9.1 FindFacilityLocation-found




Search for Position 02 returned 2 locations; tool stays visible for another search.

### .2.6.1.9.2 link buttons

[New Facility] [New Facility Location] [Find] [New Inventory Item] [Edit] [Facility] [ContactMechs] [Groups] [Locations] [Roles] [Inventory] [Inventory Receive] [Inventory Xfers] [Receive Return] [Picking] [Packing] [Scheduling] [Incoming Shipments] [Outgoing Shipments]

### .2.6.1.9.3 Tool

The search tool remains on the screen when findings are returned so you can quickly perform another search when needed.

## .2.6.1.9.4 Table of Found Locations

### .2.6.1.9.4.1 Facility

Click on the Facility name [ID] to go to the Facilities tab > Facility sub-tab for that facility.

### .2.6.1.9.4.2 Location SeqID

Click on the Location SeqID or [Edit] to be taken to the Edit Facility Location screen. This SeqID is created as a concatenation of the elements of the location. See further below for Edit/Create New Inventory Item.

### .2.6.1.9.4.3 Type

Refers to what type of item is found there.

### .2.6.1.9.4.4 Area

Which Area of the Facility are you starting from?

### .2.6.1.9.4.5 Aisle

Which Aisle within that Area are you searching?

### .2.6.1.9.4.6 Section

Which Section of the Aisle is your focus?

### .2.6.1.9.4.7 Level

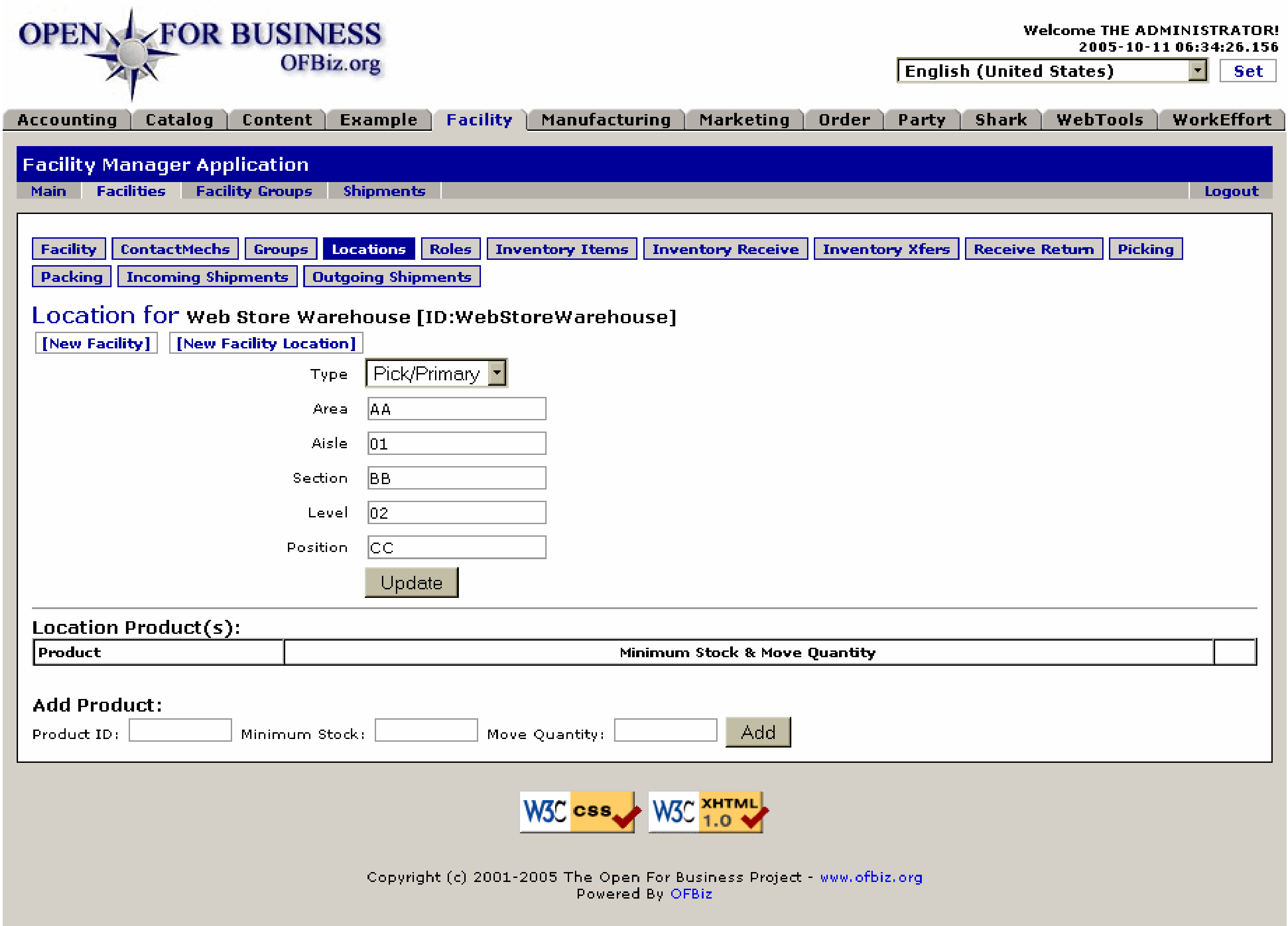
Which Level (of shelving) within that Section is the Position?

### .2.6.1.9.4.8 Position

What Position on that Level of this Section is the item located?

## .2.6.2 New Facility Location

### .2.6.2.1 EditFacilityLocation-new




Create a new Facility Location. Do not add Products until LocSeqID exists.

### .2.6.2.2 link buttons

[New Facility] [New Facility Location] [Add] [Update] [Delete] [New Inventory Item] [Facility] [ContactMechs] [Groups] [Locations] [Roles] [Inventory] [Inventory Receive] [Inventory Xfers] [Receive Return] [Picking] [Packing] [Scheduling] [Incoming Shipments] [Outgoing Shipments]

### .2.6.2.3 Tool for new location

The key to locations is the Location SeqID. This is created by this tool as a concatenation of the Area / Aisle / Section / Level

/ Position characters. There is a limit of 20 characters in the LocSeqID, so try to keep the parts descriptive yet brief.

After the Location SeqID has been established, you can continue at the screen to add products.

#### .2.6.2.3.1 Type (drop-down box)

Refers to what type of item is found there.

#### .2.6.2.3.2 Area

Which Area of the Facility are you starting from?

#### .2.6.2.3.3 Aisle

Which Aisle within that Area are you searching?

#### .2.6.2.3.4 Section

Which Section of the Aisle is your focus?

#### .2.6.2.3.5 Level

Which Level (of shelving) within that Section is the Position?

#### .2.6.2.3.6 Position

What Position on that Level of this Section is the item located?

### .2.6.2.4 Location Products

Add products to this location including Minimum Stock and Move Quantities after the Location SeqID has been generated.

#### .2.6.2.4.1 Product ID

Identify the stock item by Product ID.

#### .2.6.2.4.2 Minimum Stock

What is the minimum Inventory Level to be maintained?

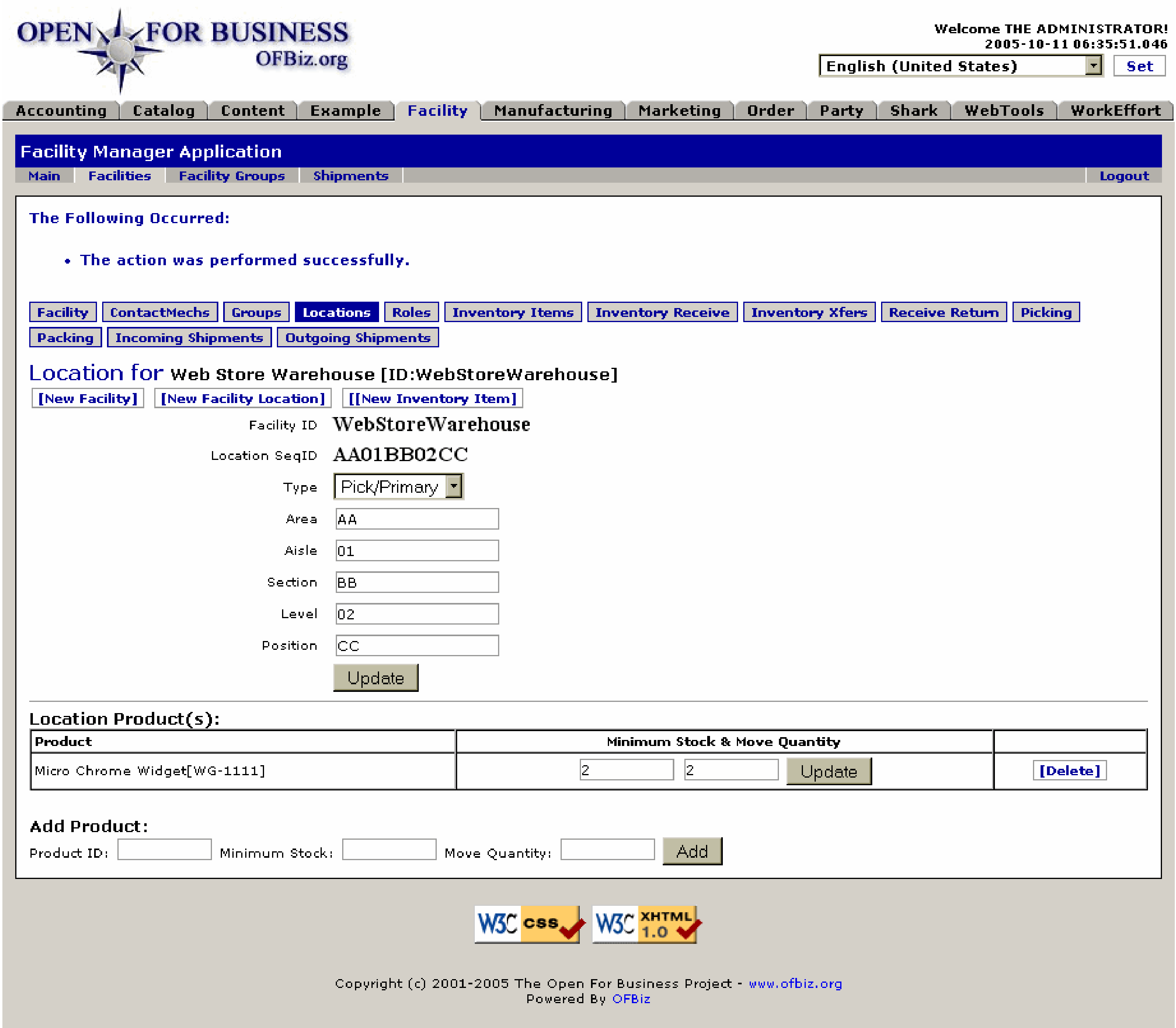
#### .2.6.2.4.3 Move Quantity

How many of this Inventory item should be moved at a time?

## .2.6.3 Edit Facility Location

When Product is Added, the table of Location Products is immediately updated.

### .2.6.3.1 createProductFacilityLocation




Product can be identified at the new Location with minimum Stock and Move quantities set.

## .2.6.3.2 link buttons

[New Facility] [New Facility Location] [New Inventory Item] [Add] [Update] [Delete] [Facility] [ContactMechs] [Groups] [Locations] [Roles] [Inventory] [Inventory Receive] [Inventory Xfers] [Receive Return] [Picking] [Packing] [Scheduling] [Incoming Shipments] [Outgoing Shipments]

## .2.6.3.3 Tool

Tool to update facility location.

### .2.6.3.3.1 Facility ID

Which Facility has the location to be identified with this tool? This field should be populated already.

### .2.6.3.3.2 Location SeqID

This must exist before product can be added to the location. First specify the components of the the LocationSeqID (Area, Aisle, Section, Level, Position), below and then press [Update]. The component parts are concatenated into this LocationSeqID.

### .2.6.3.3.3 Type (drop-down box)

For example: Pick/Primary or Bulk. If this category is not applicable, leave blank or enter the '---.'

### .2.6.3.3.4 Area

Which Area of the Facility are you starting from?

### .2.6.3.3.5 Aisle

Which Aisle within that Area are you searching?

### .2.6.3.3.6 Section

Which Section of the Aisle is your focus?

### .2.6.3.3.7 Level

Which Level (of shelving) within that Section is the Position?

### .2.6.3.3.8 Position

What Position on that Level of this Section is the item located?

## .2.6.3.4 Location Products

Table of existing products within which you can change Minimum Stock and Move quantities or delete the item.

### .2.6.3.4.1 Product

Gives both the product Name and the Product ID for products already at this Location.

### .2.6.3.4.2 Minimum Stock

The established minimum stock (inventory) level for this location. You can change this level here in the table; press [Update] when complete.

### .2.6.3.4.3 Move Quantity

When moving this inventory to replenish stock, what is the minimum quantity that should be moved at a time?

You can change this quantity in the table. Press [Update] when complete.

## .2.6.3.5 Add Product

### .2.6.3.5.1 Product ID

Enter the ID of the Product to be maintained at this location.

### .2.6.3.5.2 Minimum Stock

The established minimum stock (inventory) level for this location.

### .2.6.3.5.3 Move Quantity

When moving this inventory to replenish stock, what is the minimum quantity that should be moved at a time?

# 2.07 Roles tab

## .2.7.1 AddPartytoFacility


Facility Roles are added or deleted from this screen. A click on the Party ID takes you to the Party Manager > Profiles screen.

## .2.7.2 link buttons

[New Facility] [Delete] [Add] [Facility] [ContactMechs] [Groups] [Locations] [Roles] [Inventory] [Inventory Receive] [Inventory Xfers] [Receive Return] [Picking] [Packing] [Scheduling] [Incoming Shipments] [Outgoing Shipments]

## .2.7.3 Facility Role Member Maintenance

Table of existing facility-related Roles.

### .2.7.3.1 Party ID

If you click on the Party ID, you are linked to the Profile screen for that ID in the Party Manager.

#### .2.7.3.2 Role Type

What Role does the Party play with this Facility?

### .2.7.4 Add Facility Party Role

#### .2.7.4.1 Party ID

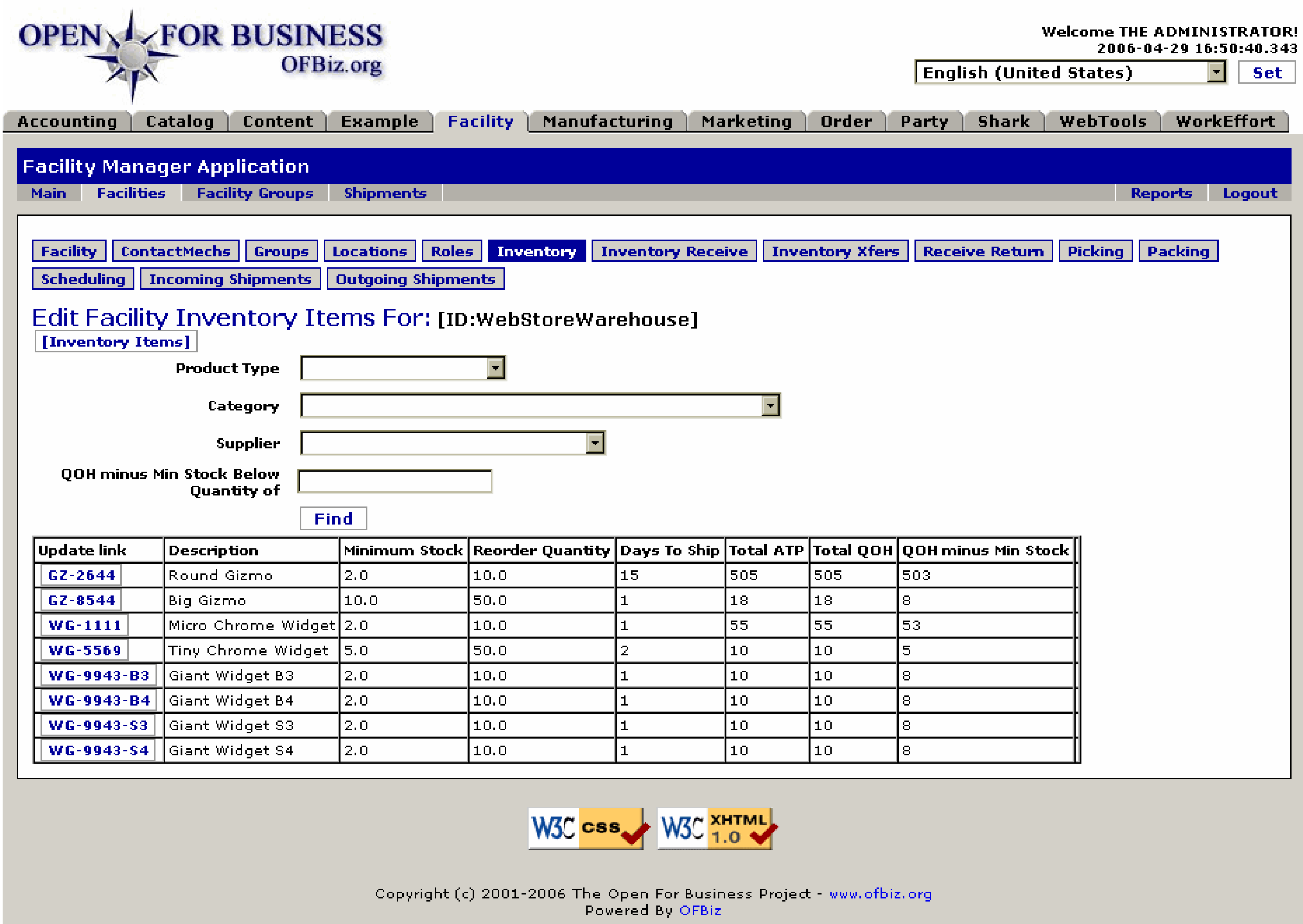
You need to have the exact Party ID to enter here. You can go to the Party Manager to determine a Party ID, then return and enter it here.

#### .2.7.4.2 Role Type (drop-down box)

What Role does the Party play with this Facility? The Role must have already been established under the Party Manager before this assignment is made.

# 2.08 Inventory tab

## .2.8.1 ViewFacilityInventoryByProduct




The table below results from a successful search following a click on [Find].

## .2.8.2 link buttons

[Inventory Items] [Find] [Facility] [ContactMechs] [Groups] [Locations] [Roles] [Inventory] [Inventory Receive] [Inventory Xfers] [Receive Return] [Picking] [Packing] [Scheduling] [Incoming Shipments] [Outgoing Shipments]

## .2.8.3 Search tool

### .2.8.3.1 Product Type (drop-down box)

To search on a Product Type, select the Type from the drop-down box.

### .2.8.3.2 Category (drop-down box)

### .2.8.3.3 Supplier (drop-down box)

Select a Supplier from the drop-down box if you want to limit the search to a specific Supplier.

### .2.8.3.4 QOH minus Min Stock Below Quantity of

If you wish to identify just those Inventory Items needing attention, this column limits returns to those where (Quantity On Hand) minus the (Minimum Stock Below Quantity of) presents only those Inventory meeting this criterium.

## .2.8.4 Table of Inventory Items

### .2.8.4.1 Update link

Click on the Item ID in this column and you are taken to the Edit Product screen, under the Catalog Manager.

### .2.8.4.2 Description

Tells you in words what the Item is.

### .2.8.4.3 Minimum Stock

The minimum stock level set for this Product.

### .2.8.4.4 Reorder Quantity

The established quantity to reorder when stock reaches a pre-set level.

### .2.8.4.5 Days To Ship

How long it takes the stock to reach your facility after ordering from the supplier.

### .2.8.4.6 Total ATP

The number of units Available to Promise.

### .2.8.4.7 Total QOH

The total number of units physically present: Quantity On Hand.

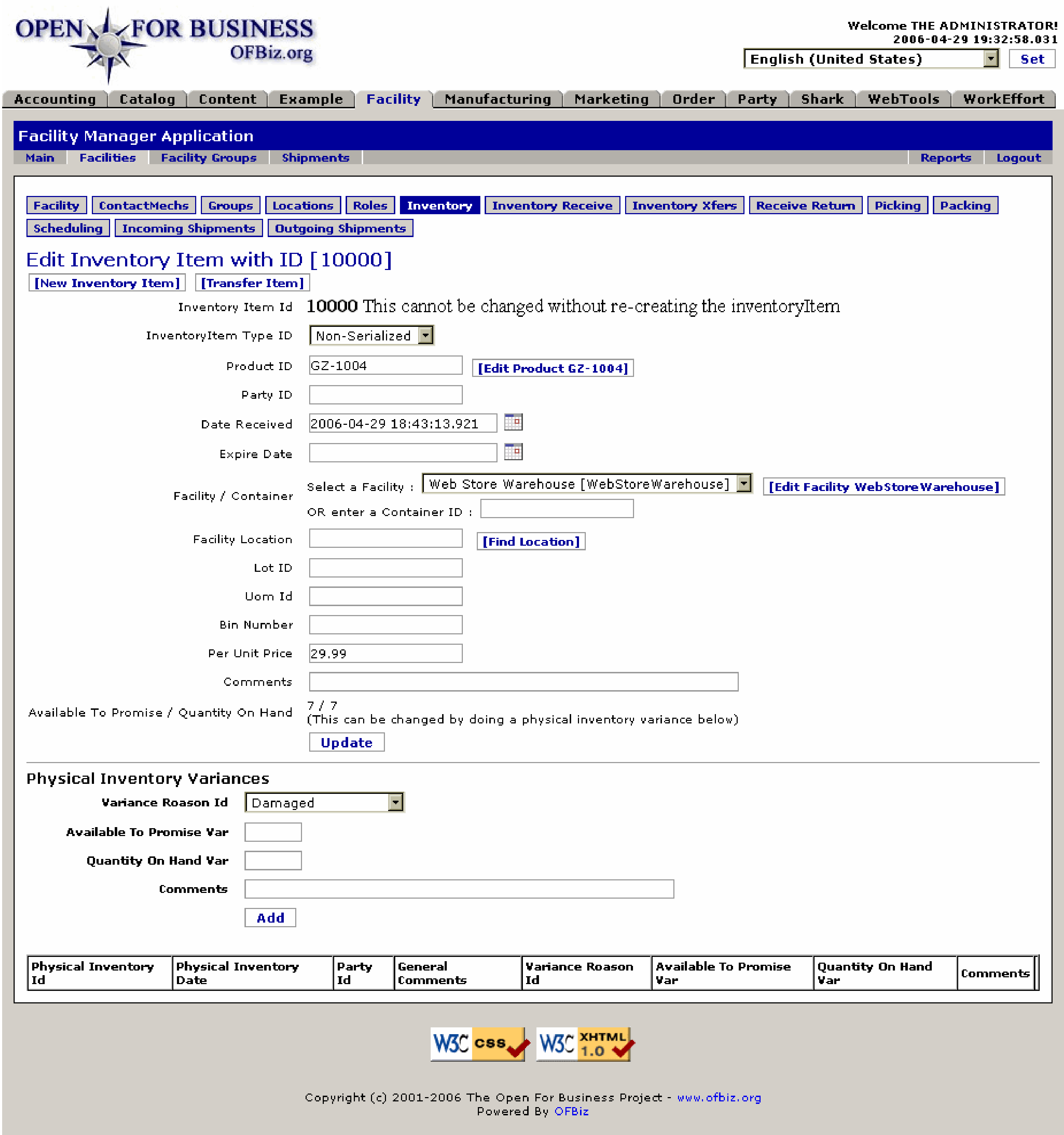
### .2.8.4.8 QOH minus Min Stock

Subtract the Minimum Stock you have set as the trigger point to re-order from the total physical inventory or Quantity On Hand to get this number.

## .2.8.5 Edit Inventory Item

Note: Actions taken here with inventory levels are only applicable to the selected Facility.

## .2.8.5.1 EditInventoryItem




Inventory Items are updated from this screen; Physical Variances in the Inventory are also accounted for here.

## .2.8.5.2 link buttons

[New Inventory Item] [Transfer Item] [Edit Product ...] [Edit Facility ...] [Find Location] [Update] [Add] [Facility] [ContactMechs] [Groups] [Locations] [Roles] [Inventory] [Inventory Receive] [Inventory Xfers] [Receive Return] [Picking] [Packing] [Scheduling] [Incoming Shipments] [Outgoing Shipments]

## .2.8.5.3 Working section

### .2.8.5.3.1 Inventory Item ID

This cannot be changed without re-creating the inventoryItem

### .2.8.5.3.2 Inventory Item Type ID (drop-down box)

Generally Serialized or Non-Serialized.

### .2.8.5.3.3 Product ID

Edit takes you to the Catalog > Main > Product update screen.

### .2.8.5.3.4 Party ID

The Party performing or authorizing this update.

### .2.8.5.3.5 Date Received (popup calendar)

Date the Product is received into this Inventory Item.

### .2.8.5.3.6 Expire Date (popup calendar)

If only available for a specific period of time, when does that time expire.

### .2.8.5.3.7 Facility / Container

The [Edit Facility] link takes you to the Facilities Tab > Facility sub-tab where you can update information about the Facility.

#### .2.8.5.3.7.1 Select a Facility (drop-down box)

Use the drop-down list to identify the Facility; this will generally populate correctly when editing an existing Inventory Item.

#### .2.8.5.3.7.2 Container ID

Enter the number of the Shipping Container if this Inventory Item is not related to a Facility.

### .2.8.5.3.8 Facility Location

The [Find Location] link beside the box takes you to the Facilities Tab > Locations sub-tab.

### .2.8.5.3.9 Lot ID

If this Item was part of an established shipping Lot, this will be the Lot number or ID.

### .2.8.5.3.10 Uom ID

If the quantity is in any unit other than each, case, or a standard method of accounting, specify the Unit Of Measure here, such as Gallon, Barrel, Ton, etc.

### .2.8.5.3.11 Bin Number

If the product is in a numbered Bin at the identified Location, specify the Bin here.

### .2.8.5.3.12 Per Unit Price

The acquisition cost for these Inventory Items.

### .2.8.5.3.13 Comments

Anything needed to explain the changes or describe the circumstances can be entered here.

### .2.8.5.3.14 Available to Promise / Quantity On Hand

What number of units is actually available to fulfill orders, to sell, to deliver, etc.

## .2.8.5.4 Physical Inventory Variances

### .2.8.5.4.1 Variance Reason (drop-down box)

What prompted the recording of a Variance?

### .2.8.5.4.2 Available to Promise Var

IMPORTANT: Enter the amount of Variance, not the absolute number available. For example, if the inventory document shows 10, but one is damaged and not available to ship, record the difference as a -1 (that is a minus one) to effect an adjustment.

### .2.8.5.4.3 Quantity on Hand Var

IMPORTANT: You are entering Variance in the QOH (quantity on hand), not the absolute QOH. Therefore, if you should have 15 but only find 10, enter a -5 (minus five). If you should have 10 but find 18, then you would enter 8. You are reporting Variances from the reported inventory here, not actual quantities.

### .2.8.5.4.4 Comments

Explain the reason for the Variance or give more details about why it was entered.

### .2.8.5.4.5 Table of Physical Inventory Variances

This is generated and updated after each entry with the tool above. Remember that the numbers given are variances, not absolute inventory figures.

#### .2.8.5.4.5.1 Physical Inventory ID

Number assigned by the system when this Inventory Variance was created. This cannot be edited, only viewed in the table.

#### .2.8.5.4.5.2 Physical Inventory Date

Date the Variance was created.

#### .2.8.5.4.5.3 Party ID

The Party ID of record when the Variance was created. This could be the login Party or the Party authorizing the entry.

#### .2.8.5.4.5.4 General Comments

General comments entered elsewhere.

#### .2.8.5.4.5.5 Variance Reason ID

The reason why this Variance was entered; originally selected from the drop-down list.

#### .2.8.5.4.5.6 Available to Promise Var

The variation on the number of units available to promise. If a reduction in quantity, there will be a minus sign in front of the number.

#### .2.8.5.4.5.7 Quantity on Hand Var

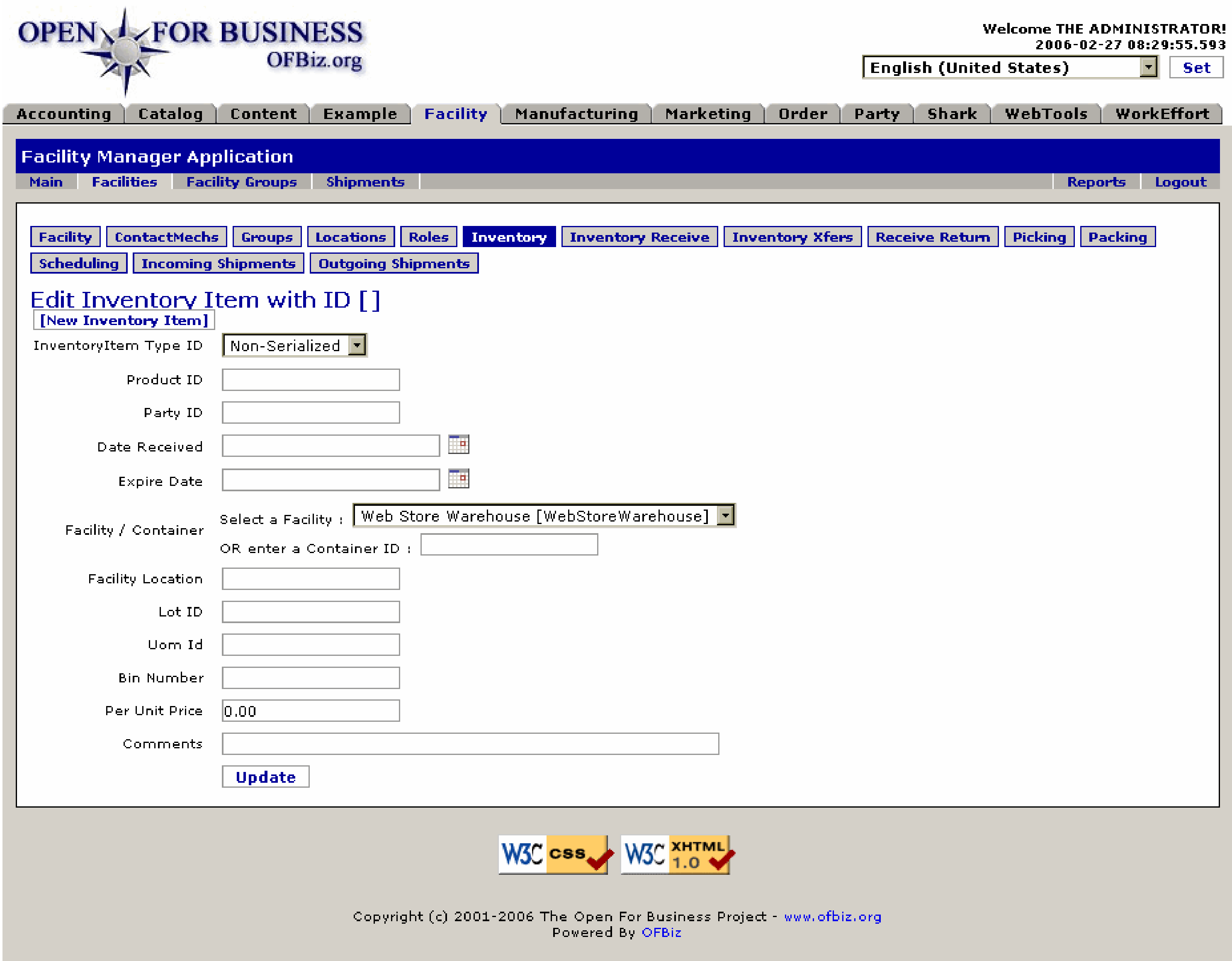
The variation on the number of units physically present. If a reduction in quantity, there will be a minus sign in front of the number.

#### .2.8.5.4.5.8 Comments

Hopefully an explanation for the Variance.

## .2.8.6 Create New Inventory Item

### .2.8.6.1 EditInventoryItem-new




Basically the same as the Edit screen (above) but without all the links and without the Variances section.

### .2.8.6.2 link buttons

[New Inventory Item] [Update] [Facility] [ContactMechs] [Groups] [Locations] [Roles] [Inventory] [Inventory Receive] [Inventory Xfers] [Receive Return] [Picking] [Packing] [Scheduling] [Incoming Shipments] [Outgoing Shipments]

### .2.8.6.3 Discussion

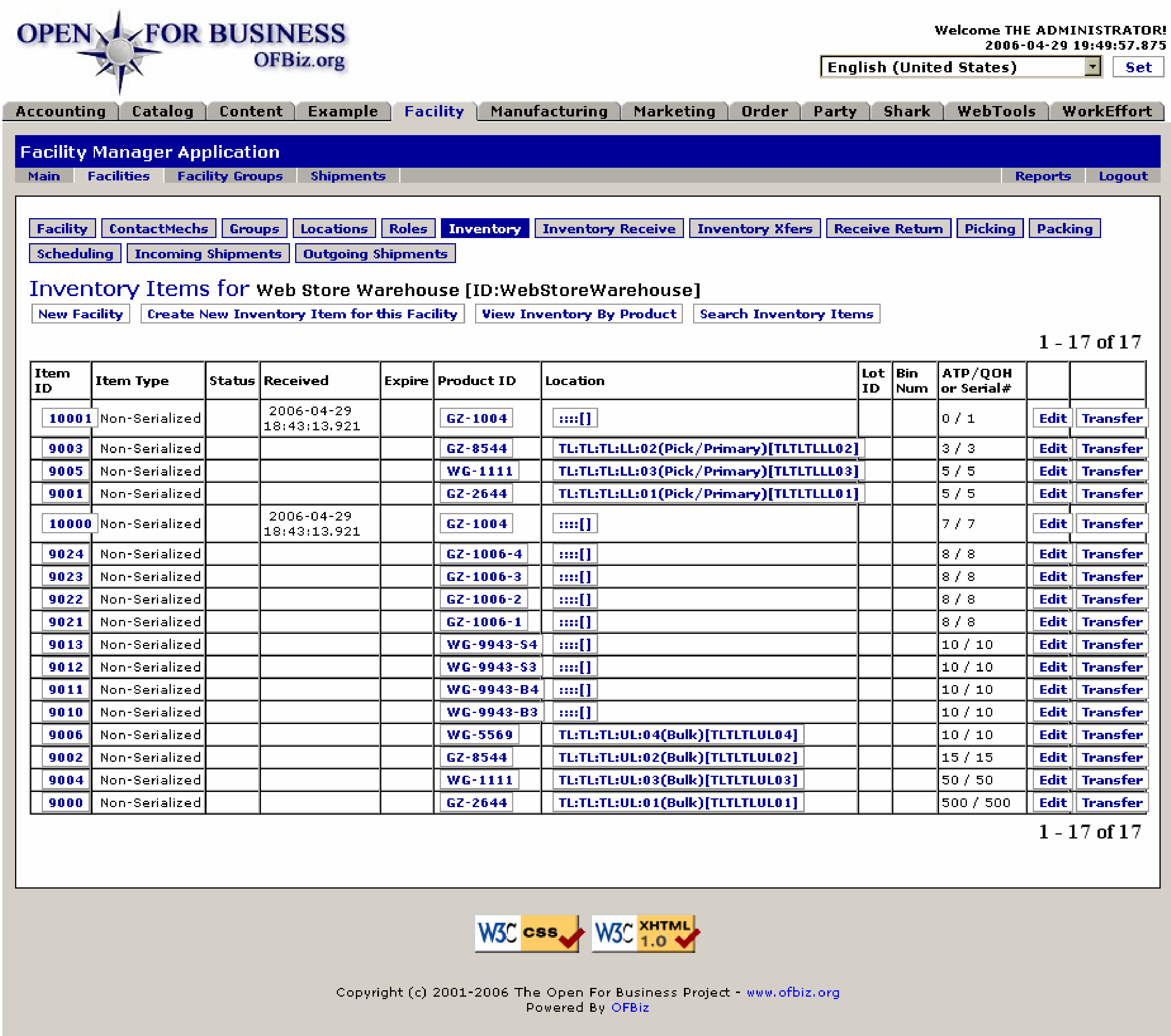
The fields have already been described above under Edit Inventory Item. Of course, some of the fields under that topic will not appear when creating a new Item.

Enter as much data as you know here. You can always come back after an Inventory Item has been created and add or change the information.

## .2.8.7 Inventory Availability for the Facility

When you click on the [Inventory Items] link above, you are brought to this screen.

## .2.8.7.1 EditFacilityInventoryItems




| Item ID | Item Type | Status | Received | Expire | Product ID | Location | Lot ID | Bin Num | ATP/QOH or Serial# | | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| 10001 | Non-Serialized | | 2006-04-29 18:43:13.921 | | GZ-1004 | ::::[] | | | 0 / 1 | Edit | Transfer |
| 9003 | Non-Serialized | | | | GZ-8544 | TL:TL:TL:LL:02(Pick/Primary)[TLTLTLLL02] | | | 3 / 3 | Edit | Transfer |
| 9005 | Non-Serialized | | | | WG-1111 | TL:TL:TL:LL:03(Pick/Primary)[TLTLTLLL03] | | | 5 / 5 | Edit | Transfer |
| 9001 | Non-Serialized | | | | GZ-2644 | TL:TL:TL:LL:01(Pick/Primary)[TLTLTLLL01] | | | 5 / 5 | Edit | Transfer |
| 10000 | Non-Serialized | | 2006-04-29 18:43:13.921 | | GZ-1004 | ::::[] | | | 7 / 7 | Edit | Transfer |
| 9024 | Non-Serialized | | | | GZ-1006-4 | ::::[] | | | 8 / 8 | Edit | Transfer |
| 9023 | Non-Serialized | | | | GZ-1006-3 | ::::[] | | | 8 / 8 | Edit | Transfer |
| 9022 | Non-Serialized | | | | GZ-1006-2 | ::::[] | | | 8 / 8 | Edit | Transfer |
| 9021 | Non-Serialized | | | | GZ-1006-1 | ::::[] | | | 8 / 8 | Edit | Transfer |
| 9013 | Non-Serialized | | | | WG-9943-S4 | ::::[] | | | 10 / 10 | Edit | Transfer |
| 9012 | Non-Serialized | | | | WG-9943-S3 | ::::[] | | | 10 / 10 | Edit | Transfer |
| 9011 | Non-Serialized | | | | WG-9943-B4 | ::::[] | | | 10 / 10 | Edit | Transfer |
| 9010 | Non-Serialized | | | | WG-9943-B3 | ::::[] | | | 10 / 10 | Edit | Transfer |
| 9006 | Non-Serialized | | | | WG-5569 | TL:TL:TL:UL:04(Bulk)[TLTLTLUL04] | | | 10 / 10 | Edit | Transfer |
| 9002 | Non-Serialized | | | | GZ-8544 | TL:TL:TL:UL:02(Bulk)[TLTLTLUL02] | | | 15 / 15 | Edit | Transfer |
| 9004 | Non-Serialized | | | | WG-1111 | TL:TL:TL:UL:03(Bulk)[TLTLTLUL03] | | | 50 / 50 | Edit | Transfer |
| 9000 | Non-Serialized | | | | GZ-2644 | TL:TL:TL:UL:01(Bulk)[TLTLTLUL01] | | | 500 / 500 | Edit | Transfer |



The link [Inventory Items] brings up this table of all the Items with numerous links to other screens.

## .2.8.7.2 link buttons

[New Facility] [Create New Inventory Item for this Facility] [View Inventory By Product] [Search Inventory Items] [Edit] [Transfer] [Facility] [ContactMechs] [Groups] [Locations] [Roles] [Inventory] [Inventory Receive] [Inventory Xfers] [Receive Return] [Picking] [Packing] [Scheduling] [Incoming Shipments] [Outgoing Shipments]

## .2.8.7.3 Table of Inventory Items

### .2.8.7.3.1 Item ID

Click on the Item ID and you will be taken to the EditInventoryItem screen for this Item. Remember that Inventory Item is a collection of like items received or grouped through a physical inventory action. A particular Product could be found in several unique Inventory Items, perhaps at different locations.

### .2.8.7.3.2 Item Type

Here referring to 'Serialized' or 'Non-Serialized'.

### .2.8.7.3.3 Status

If a statusing system is in place, the current or last-reported Status would be given here.

### .2.8.7.3.4 Received

When this Item ID was received or established through a physical inventory action.

### .2.8.7.3.5 Expire

If the existence or presence of this Item ID is to be terminated at some point, that date can be given here.

### .2.8.7.3.6 Product ID

Click on this link to be taken to the Catalog Manager > Edit Product screen.

### .2.8.7.3.7 Location

Where the Inventory Item presently exists. Click on this link to be taken back to the Locations tab.

### .2.8.7.3.8 Lot ID

Which identified product Lot includes this Item ID.

### .2.8.7.3.9 Bin Num

If the Products for this Item ID are located within a numbered Bin, that number is given here.

### .2.8.7.3.10 ATP / QOH or Serial #

The number of units Available to Promise / and the Quantity On Hand is given for non-serialized products. With Serialized units, the Serial Number is given. Generally speaking, a Serialized unit will have its own Item ID, not shared with any other.

### .2.8.7.3.11 Edit link column

Clicking on either the[Edit] link here or on the Item ID number will take you to the Edit Inventory screen.

### .2.8.7.3.12 Transfer link column

Clicking on the [Transfer] link opens this Inventory Item under the Inventory Xfers (transfers) tab.

# 2.09 Inventory Receive tab

## .2.9.1 Receive Products by Purchase Order

If receiving items ordered under a Purchase Order, enter that number here to receive them. (You can find it with the search tool.) Then press [Receive Product].

If order is not by PO, enter the Product ID in the lower box. Do NOT enter both numbers; the Purchase Order product details will be populated in the next screen.

### .2.9.1.1 ReceiveInventoryPO


Enter either the Purchase Order number or the Product ID, then press [Receive Product(s)]. Do NOT complete both boxes.

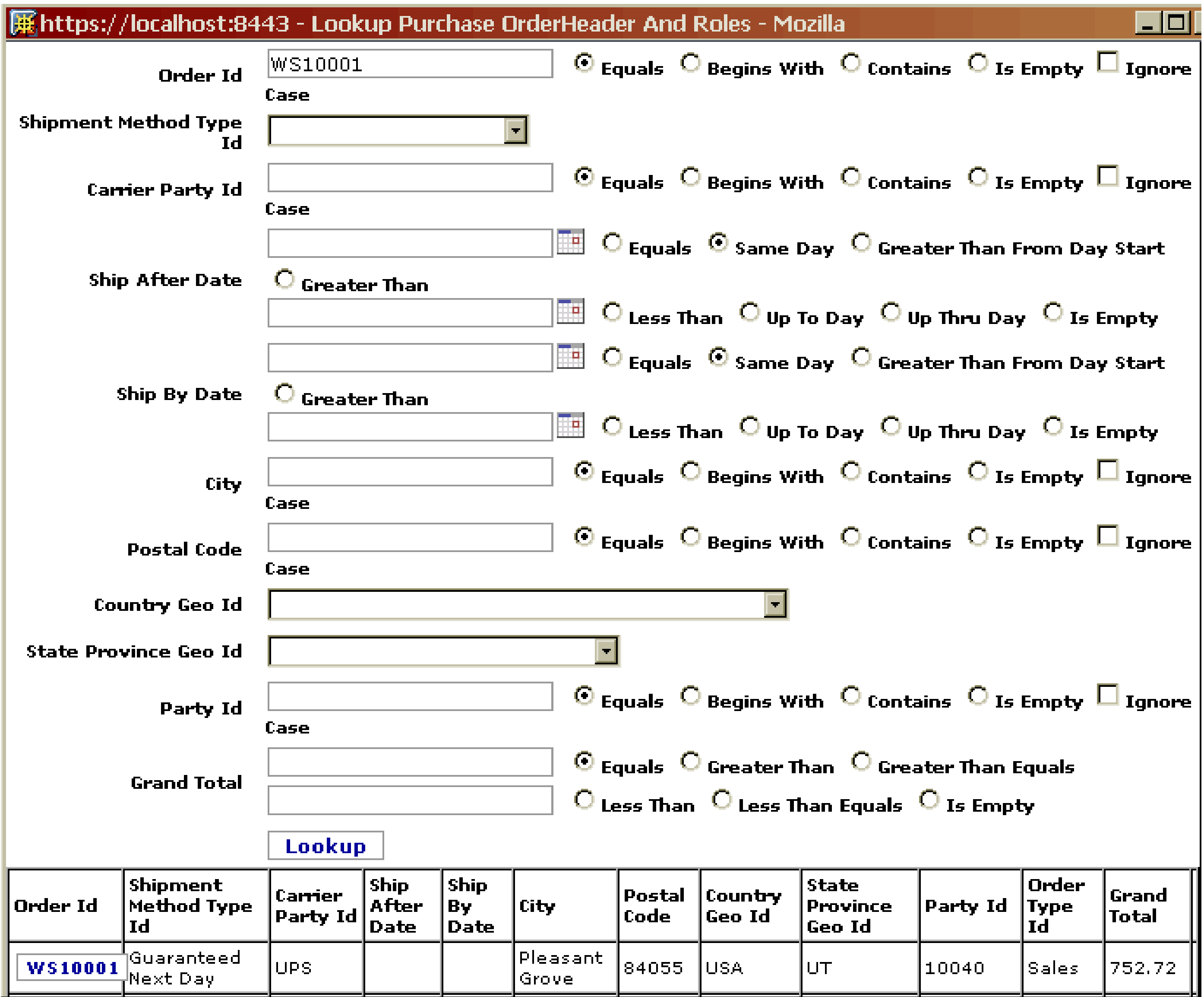
### .2.9.1.2 link buttons

[New Facility] [Receive Product(s)] [Facility] [ContactMechs] [Groups] [Locations] [Roles] [Inventory] [Inventory Receive] [Inventory Xfers] [Receive Return] [Picking] [Packing] [Scheduling] [Incoming Shipments] [Outgoing Shipments]

### .2.9.1.3 Purchase Order Number (popup search box)

Enter the PO number here (the one generated in the Orders section) then press [Receive Products].

#### .2.9.1.3.1 LookupPOpopup



Popup screen to help locate Purchase Orders.

## .2.9.1.4 Product ID (popup search box)

### .2.9.1.4.1 LookupIDpopup

Product ID [ ] Case ◉ Equals ○ Begins With ○ Contains ○ Is Empty ☐ Ignore

Brand Name [ ] Case ◉ Equals ○ Begins With ○ Contains ○ Is Empty ☐ Ignore

Internal Name [ ] Case ◉ Equals ○ Begins With ○ Contains ○ Is Empty ☐ Ignore

Product Type [Finished Good]

Primary Category [ ]

Lookup

| Product ID | Brand Name | Internal Name | Product Type | |
|---|---|---|---|---|
| GZ-1000 | | Tiny Gizmo | FINISHED_GOOD | |
| GZ-1001 | | Nan Gizmo | FINISHED_GOOD | |
| GZ-1004 | | Rainbow Gizmo | FINISHED_GOOD | |
| GZ-1005 | | .NIT Gizmo | FINISHED_GOOD | |
| GZ-1006 | | Open Gizmo | FINISHED_GOOD | Variants |
| GZ-2002 | | Square Gizmo | FINISHED_GOOD | |
| GZ-2644 | | Round Gizmo | FINISHED_GOOD | |
| GZ-5005 | | Purple Gizmo | FINISHED_GOOD | |
| GZ-7000 | | Massive Gizmo | FINISHED_GOOD | |
| GZ-8544 | | Big Gizmo | FINISHED_GOOD | |
| GZ-9290 | | His/Her Gizmo | FINISHED_GOOD | |
| WG-1111 | | Micro Chrome Widget | FINISHED_GOOD | |
| WG-5569 | | Tiny Chrome Widget | FINISHED_GOOD | |
| WG-9943 | | Giant Widget | FINISHED_GOOD | Variants |
| GZ-KIT | | Pre-Assembled Gizmo Kit | FINISHED_GOOD | |
| GZ-BASKET | | Auto-Explode Gizmo Basket | FINISHED_GOOD | |
| RAM256_BRAND | | RAM 256 no parity | FINISHED_GOOD | |
| HD2GB_BRAND | | HD 2 GB | FINISHED_GOOD | |
| HD4GB_BRAND | | HD 4 GB | FINISHED_GOOD | |
| ETH_BRAND | | Ethernet Card 10/100 | FINISHED_GOOD | |

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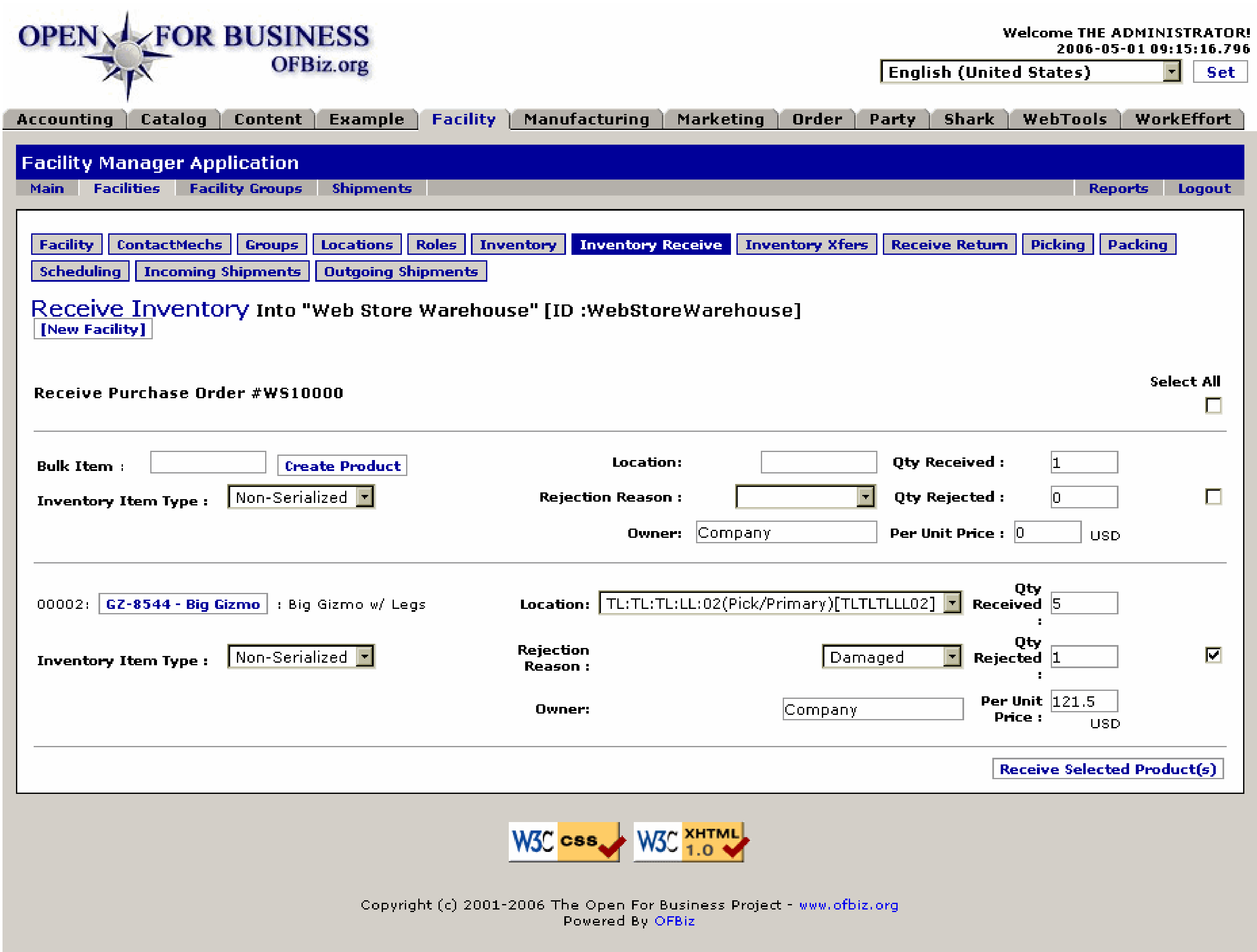
When the Product Type was requested, these search results returned. Click the Product ID.

## .2.9.1.5 >> Receive Products

### .2.9.1.5.1 ReceiveInventoryPO-Received




Receive the ordered product into inventory at this screen. Set Types and Reasons before clicking [Receive Selected Product(s)].

### .2.9.1.5.2 link buttons

[New Facility] [Receive Selected Product(s)] [Facility] [ContactMechs] [Groups] [Locations] [Roles] [Inventory] [Inventory Receive] [Inventory Xfers] [Receive Return] [Picking] [Packing] [Incoming Shipments] [Outgoing Shipments]

### .2.9.1.5.3 Select All

Check the Select All button to receive every item. If more than one item and you are not prepared to 'receive' one or more at this time, select only those that you wish. The Purchase Order will remain active until all items have been received or otherwise dispatched.

### .2.9.1.5.4 Bulk Item or Item ID

Each line item of the PO will have one or the other of these given first in the upper LH corner of its section to identify what is shown.

### .2.9.1.5.5 Location (drop-down box)

Enter warehouse location destination if known. For established products, use the drop-down box to complete the field.

### .2.9.1.5.6 Qty Received

This quantity and the Qty Rejected number need to equal the number on the order. You can make other adjustments to the Inventory elsewhere, but the PO will not be cleared for payment until the totals received and rejected together equal the total ordered.

### .2.9.1.5.7 Inventory Item Type (drop-down box)

Items identified with serial numbers need to be processed more carefully than those non-serialized.

### .2.9.1.5.8 Rejection Reason (drop-down box)

There could be other reasons for rejecting some or all of the order but these generally cover most instances:

- Damaged
- Not Ordered
- Overshipped

### .2.9.1.5.9 Qty Rejected

Again, the total Rejected together with the total Received must equal the total Ordered in the Purchase Order.

### .2.9.1.5.10 Owner

This would generally be the Company or the Department within the company which placed the original order.

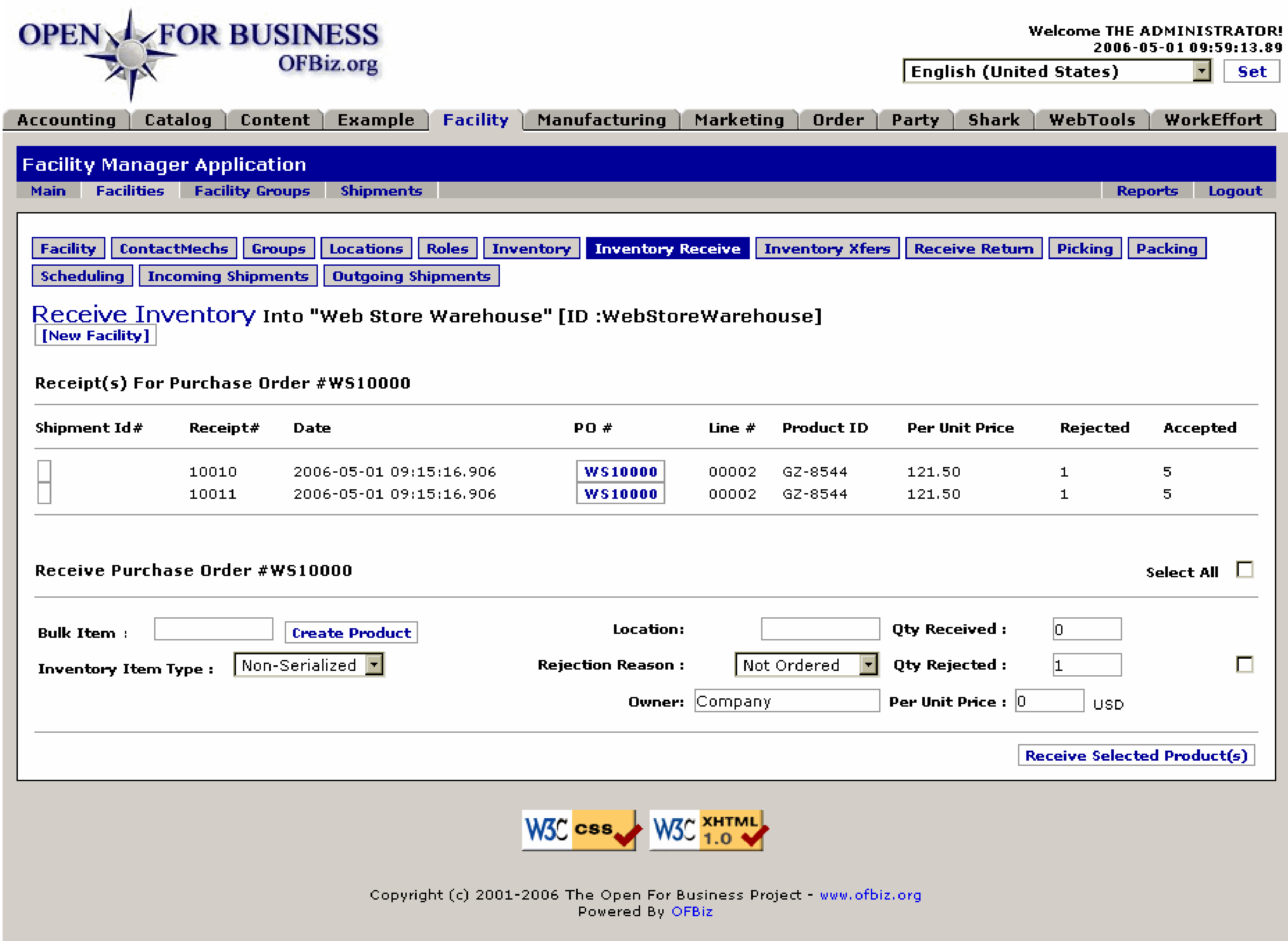
Matches what was selected in the first screen under the Order Manager > Order Entry screen.

### .2.9.1.5.11 Per Unit Price

How much was paid for each item with this Purchase.

## .2.9.1.5.12 >> Receive Selected Products

### .2.9.1.5.12.1 receiveInventoryProduct-Receipt




After product has been received, this screen confirms with a Receipt number for each line item, and shows any not yet received.

### .2.9.1.5.12.2 link buttons

[New Facility] [Receive Selected Product] [Create Product] [Facility] [ContactMechs] [Groups] [Locations] [Roles] [Inventory] [Inventory Receive] [Inventory Xfers] [Receive Return] [Picking] [Packing] [Incoming Shipments] [Outgoing Shipments]

### .2.9.1.5.12.3 Receipt(s) For Purchase Order

This section provides details about the inventory just received:

- Shipment ID#
- Receipt #
- Date

- PO #
- Line #
- Product ID
- Rejected
- Accepted

#### .2.9.1.5.12.4 Receive Purchase Order

If there are any items remaining in the PO to be received, this section functions much like the previous screen to allow you to receive some or all of the remainder.

## .2.9.2 Receive Products by Product ID

### .2.9.2.1 Discussion

Enter the Product ID here only if the Product was not ordered by Purchase Order. Then press [Receive Products].

The next screen appears when Product ID is entered and [Receive Product(s)] is pressed. Do NOT press the [Receive] button at the bottom of this screen until all the data on the screen is correct. Upon pressing the screen you are taken back to a fresh Receive Inventory screen, above.

## .2.9.2.2 ReceiveInventoryProduct


Receive the ordered Product into Inventory at this screen. Set Types and Reasons before receiving.

## .2.9.2.3 link buttons

[New Facility] [Receive] [Facility] [ContactMechs] [Groups] [Locations] [Roles] [Inventory] [Inventory Receive] [Inventory Xfers] [Receive Return] [Picking] [Packing] [Scheduling] [Incoming Shipments] [Outgoing Shipments]

## .2.9.2.4 Product ID

Identifies the Product entered in the previous screen.

### .2.9.2.5 Product Name

Common name of the Product. Click on ths to open another Browser in the Catalog Manager at the Product Edit screen for this product.

### .2.9.2.6 Product Description

How the product is described in the catalog.

### .2.9.2.7 Item Description

The Item is what is inventoried. This describes that inventoried item.

### .2.9.2.8 Inventory Item

In Inventory Item is a unit of Product that is tracked through the system. All of the same Product ID that is received or inventoried as a collection of the same Products are tracked as a group, identified by this Inventory Item number assigned when the product is received.

### .2.9.2.9 Inventory Item Type (drop-down box)

Generally to establish whether or not the items have serial numbers assigned which might need tracking.

### .2.9.2.10 Date Received

Automatically completed, but can be modified if current date and time is not the actual receipt time.

### .2.9.2.11 Facility Location

May be automatically populated with an established location for this Inventory Item, but can be changed.

### .2.9.2.12 Rejected Reason (drop-down box)

If all or part of the received goods are being rejected, select the reason from this drop-down box.

### .2.9.2.13 Quantity Rejected

How many units are being rejected at this time.

### .2.9.2.14 Quantity Accepted

The sum of these Accepted and the number Rejected needs to equal the total Received on the Invoice.

### .2.9.2.15 Per Unit Price

The price per unit of product.

### .2.9.2.16 ~~Receive~~ Link

When this button is clicked, the products are received into inventory and you are returned to the first Inventory Receive tab screen.

## 2.10 Inventory Transfers tab

Current transfers are displayed on this first 'Find Transfers' screen. If none displayed, go back to the Main tab, select a facility, then return here. [Inventory Transfer] takes you to the screen for establishing a transfer, 'Inventory Transfers for ...', below.

## .2.10.1 FindFacilityTransfers


This screen opens the Inventory Transfer tab with tables of all incomplete Transfers for the active Facility. Click [Edit].

## .2.10.2 link buttons

[New Facility] [Active and Inactive (toggle)] [Inventory Transfer] [Edit] [Facility] [ContactMechs] [Groups] [Locations] [Roles] [Inventory] [Inventory Receive] [Inventory Xfers] [Receive Return] [Picking] [Packing] [Scheduling] [Incoming Shipments] [Outgoing Shipments]

## .2.10.3 Inventory Transfers To: / From: ...

Click on the Transfer ID or [Edit] link to go to the Inventory Transfer screen, below.

### .2.10.3.1 Transfer ID

Click on this to go to the Inventory Transfer screen, below.

### .2.10.3.2 Item

Click on this to go back to the Edit Inventory Item, above.

### .2.10.3.3 From /or/ To

This heading (From or To) depends upon whether the transfer is coming in or going out. Click on the Facility ID to go to the Edit Facility screen.

### .2.10.3.4 Send Date

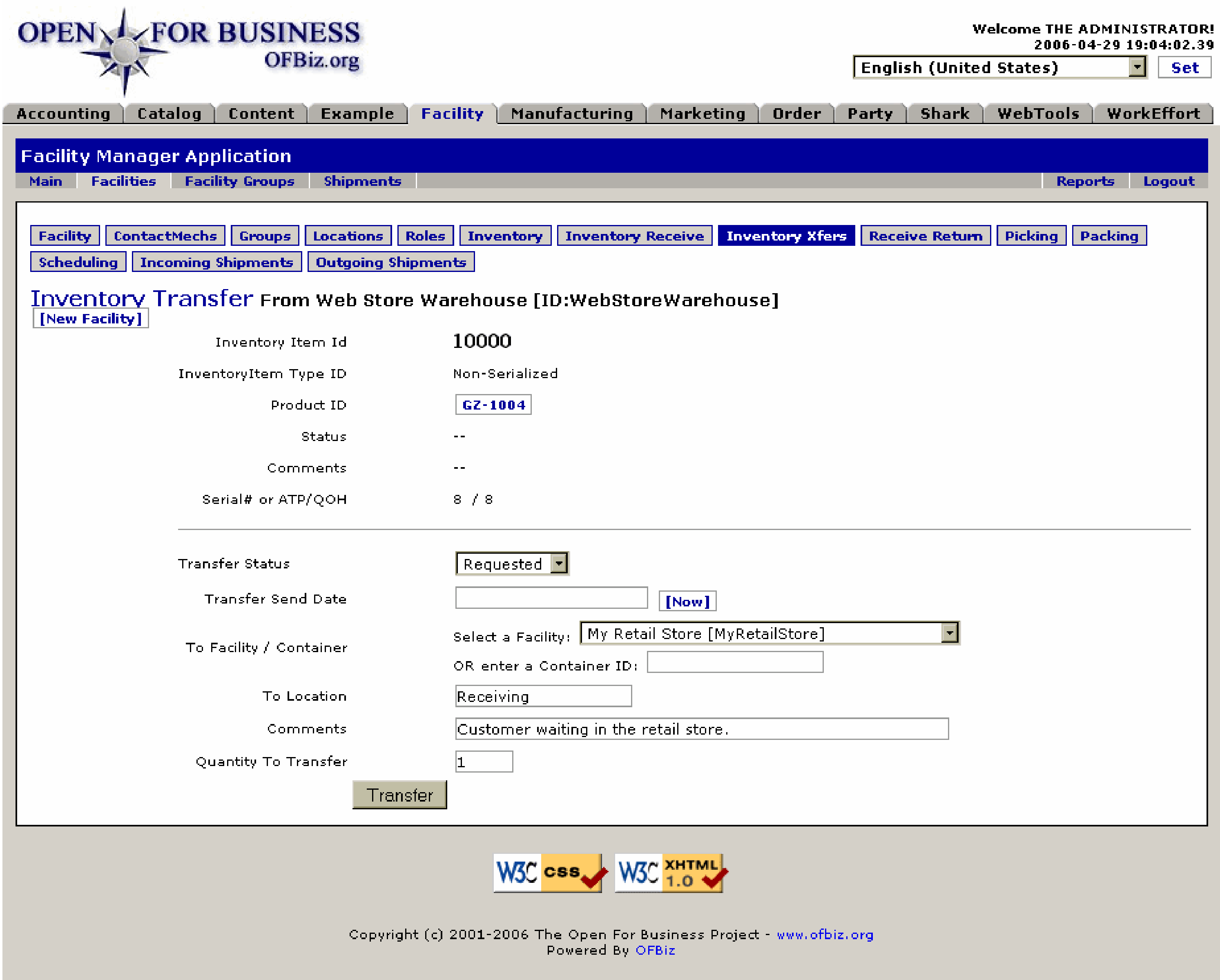
Date the transfer was taken to the point of the following Status.

### .2.10.3.5 Status

Where is the Inventory ID at in the transfer process?

## .2.10.4 Edit Inventory Transfer ID

### .2.10.4.1 TransferInventoryItem




Create or edit an existing Transfer at this screen.

### .2.10.4.2 link buttons

[New Facility] [Now] [Update] [Facility] [ContactMechs] [Groups] [Locations] [Roles] [Inventory] [Inventory Receive] [Inventory Xfers] [Receive Return] [Picking] [Packing] [Scheduling] [Incoming Shipments] [Outgoing Shipments]

### .2.10.4.3 Inventory Item ID

That which is being transferred from one location to another.

### .2.10.4.4 Inventory Item Type ID

Generally Serial or Non-Serial.

### .2.10.4.5 Product ID

Which Product is included in the Inventory Item. A click on this link takes you to Catalog manager - Product Catalog page.

### .2.10.4.6 Status

The last known status for this Transfer.

### .2.10.4.7 Comments

A good place to learn why the transfer is taking place.

### .2.10.4.8 Serial # or ATP/QOH

These items cannot be changed without creating a new Inventory Transfer.

### .2.10.4.9 Transfer Status (drop-down box)

As you process this page, the Status should be changed to reflect the new conditions. Select from among the following:

- Requested
- Scheduled
- Enroute
- Complete
- Cancelled

### .2.10.4.10 Transfer Send Date

[Now] inserts current date/time. Format: 2005-05-27 13:31:46.500

### .2.10.4.11 Transfer Receive Date

[Now] inserts current date/time. Format: 2005-05-27 13:31:46.500

### .2.10.4.12 To Facility / Container (drop-down box)

Facility (or Container) where the Inventory Item is being transferred to. Drop-down box appears when the transfer is not yet completed.

### .2.10.4.13 To Location

Specific warehouse or shelving location for the final move.

### .2.10.4.14 Comments

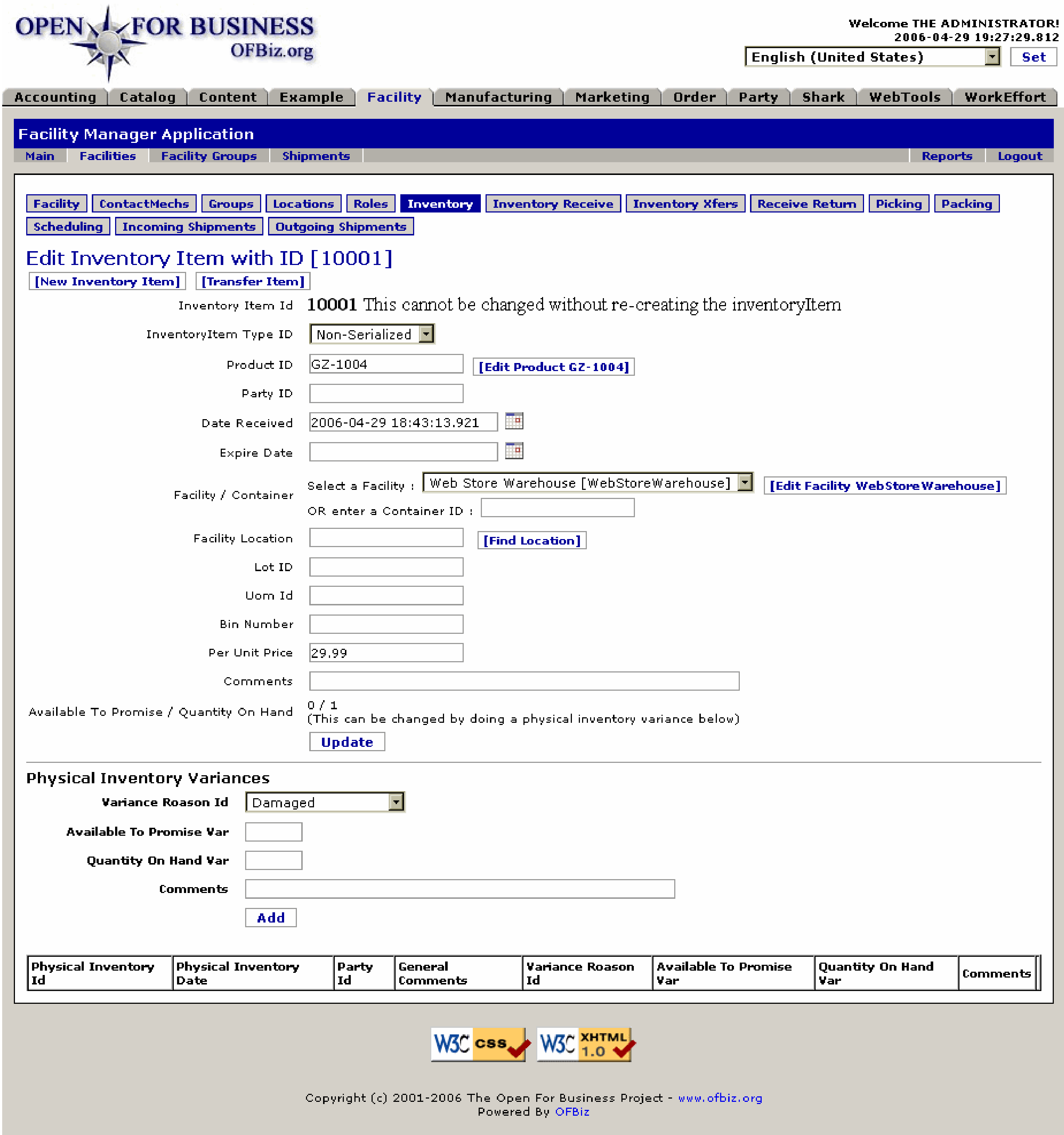
Any problems encountered or explanations needed by others.

### .2.10.4.15 Quantity to Transfer

How many units are being transferred.

### .2.10.5 Edit Inventory Item

#### .2.10.5.1 EditInventoryItems-Xfer




Note that the Inventory Item linked you back here to the Inventory tab for editing the item.

## .2.10.6 Create an Inventory Transfer

To get to this point, click on the [Inventory XFers] tab. Then click on the link [Inventory Transfer] which will bring up the following screen.

## .2.10.6.1 Establish Inventory Transfer Item

### .2.10.6.1.1 TransferInventoryItem-find


Inventory Transfer process begins with the selection of an Inventory Item ID from the active Facility.

### .2.10.6.1.2 link buttons

[New Facility] [Get Item] [Facility] [ContactMechs] [Groups] [Locations] [Roles] [Inventory] [Inventory Receive] [Inventory Xfers] [Receive Return] [Picking] [Packing] [Scheduling] [Incoming Shipments] [Outgoing Shipments]

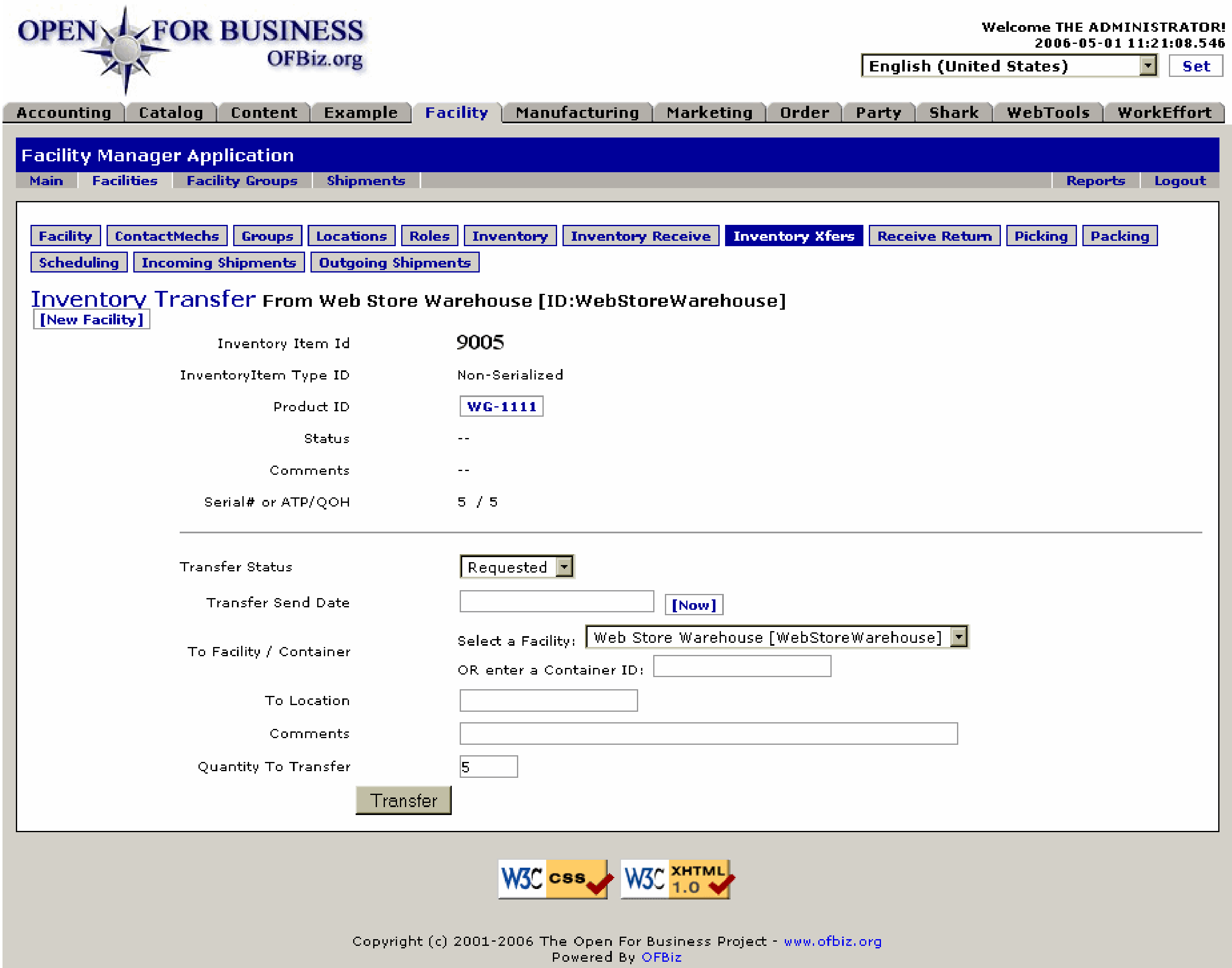
### .2.10.6.1.3 Inventory Item ID

Note that this is not the Part number or the end Item ID - it is the Inventory Item ID which holds the group of related items together for inventory and tracking purposes. You will be transferring items from this group of stock (Inventory Item ID) to another location.

To confirm that the items you want are part of the Inventory Item ID, you can check at the Inventory Items tab.

## .2.10.6.2 Inventory Transfer Creation screen

### .2.10.6.2.1 TransferInventoryItem-create




Create the Inventory Transfer transaction from this screen; very similar to the Edit Transfer screen shown earlier.

### .2.10.6.2.2 link buttons

[New Facility] [Now] [Transfer] [Facility] [ContactMechs] [Groups] [Locations] [Roles] [Inventory] [Inventory Receive] [Inventory Xfers] [Receive Return] [Picking] [Packing] [Scheduling] [Incoming Shipments] [Outgoing Shipments]

### .2.10.6.2.3 Inventory Item ID

This is what is being moved - the Inventory Item, which includes the product content.

### .2.10.6.2.4 Inventory Item Type ID

Serialized or Non-Serialized?

### .2.10.6.2.5 Product ID

This is the Product content of the Inventory Item. A click on the ID takes you to Catalog manager - Product Catalog page.

### .2.10.6.2.6 Status

Will initially start with no status. After the Transfer is created, you may see reported status here, reflecting where the process is at.

### .2.10.6.2.7 Comments

May reflect comments entered earlier regarding this Inventory Item. As the transfer progresses, this should mention problems or reasons for the transfer.

### .2.10.6.2.8 Serial # or ATP/QOH

If this is a serialized Inventory Item, the serial number will be given. Otherwise, quantities are given here for ATP and QOH.

### .2.10.6.2.9 Transfer Status (drop-down box)

Your first entry here should be Requested or Scheduled. Status categories available include:

- Requested
- Scheduled
- En-Route
- Complete
- Cancelled

### .2.10.6.2.10 Transfer Send Date

[Now] inserts current date/time.

### .2.10.6.2.11 To Facility / Container

#### .2.10.6.2.11.1 Select a Facility (drop-down box)

Select the destination for the Inventory Item from the drop-down box unless it is going to a shipping Container.

#### .2.10.6.2.11.2 Container ID:

Do NOT enter both a Facility AND a Container ID; only one or the other.

#### .2.10.6.2.12 To Location

This means an identified location within the receiving facility. You may leave blank unless already specified by the requester.

#### .2.10.6.2.13 Comments

You should record the reason for the transfer and indicate any problems or unusual situations here.

#### .2.10.6.2.14 Quantity to Transfer

This needs to be completed. Should not exceed either the ATP or QOH.

## 2.11 Receive Return tab

**A previously-generated Return ID number must exist in the system before items can be received this way.**

### .2.11.1 Find the return

Returns must first be created, assigned a number and approved in the Order Manager - Returns tab. Then locate the return, using its Return ID number.

### .2.11.1.1 ReceiveReturn


Before "receiving" the Return, the Return Number must be known and entered here. All Returns begin in the Order Manager.

### .2.11.1.2 link buttons

[New Facility] [Receive Product(s)] [Facility] [ContactMechs] [Groups] [Locations] [Roles] [Inventory] [Inventory Receive] [Inventory Xfers] [Receive Return] [Picking] [Packing] [Scheduling] [Incoming Shipments] [Outgoing Shipments]

### .2.11.1.3 Return Number

Enter the Return ID number, then click on the [Receive Products] link.

## .2.11.2 Receive Return into ...

### .2.11.2.1 ReceiveReturn-found


Actually accept the return of the items into your Facility through this screen. Location is optional.

### .2.11.2.2 link buttons

[New Facility] [Receive Selected Product(s)] [Facility] [ContactMechs] [Groups] [Locations] [Roles] [Inventory] [Inventory Receive] [Inventory Xfers] [Receive Return] [Picking] [Packing] [Scheduling] [Incoming Shipments] [Outgoing Shipments]

### .2.11.2.3 Receive Return

A chart of items being returned is presented. Each item comes with the following information or processing boxes.

#### .2.11.2.3.1 Item ID number and name

Includes descriptive name. Click on this link to go to a new window with the Product in the Catalog Manager > Product Edit page.

### .2.11.2.3.2 Location

While this might populate from the known warehouse location, you may enter a location or a temporary location here, but the location needs to be an established one, recognized by the system.

### .2.11.2.3.3 Qty Received

Must indicate the Quantity.

### .2.11.2.3.4 Initial Inventory Item Status

Drop-down box with possible status of:

- Returned
- Available
- Defective

## .2.11.2.4 Select All (check box)

If returning all the items, click on the Select all box. Else, check just those boxes following items to be actually returned.

## .2.11.2.5 Discussion

Returns are created in the Order Manager. They must be approved, incoming shipments need to be created, and then when they actually arrive, you come to this screen with the correct Return Number. See the document Application Overview for Users and go to the appropriate section of the Sales Order Process for further details.

To close out the Return, physically bringing the item back into inventory at the stated Status, click on the [Receive Selected Product(s)] link in the lower right-hand corner of the screen. A Receipt will be generated as discussed below to indicate success.

## .2.11.3 Product Received - Receipt

### .2.11.3.1 receiveReturnedProduct


This Receipt is generated upon successfully "receiving" the product back into the facility.

### .2.11.3.2 link buttons

[New Facility] [Facility] [ContactMechs] [Groups] [Locations] [Roles] [Inventory] [Inventory Receive] [Inventory Xfers] [Receive Return] [Picking] [Packing] [Scheduling] [Incoming Shipments] [Outgoing Shipments]

### .2.11.3.3 Receipt(s) for Return #

Click on the Return number to edit the original Return.

### .2.11.3.4 Receipt

The number for the Receipt for this line of the returns.

### .2.11.3.5 Date

The Date and Time that the items were actually logged back into the Facility.

### .2.11.3.6 Return

The original Return ID.

### .2.11.3.7 Line

Which Line Item on the Return is actually being receipted here.

### .2.11.3.8 Product ID

The Product ID confirms which item was returned by it Product ID number.

### .2.11.3.9 Quantity

How many of the Product ID were physically received by the Facility.

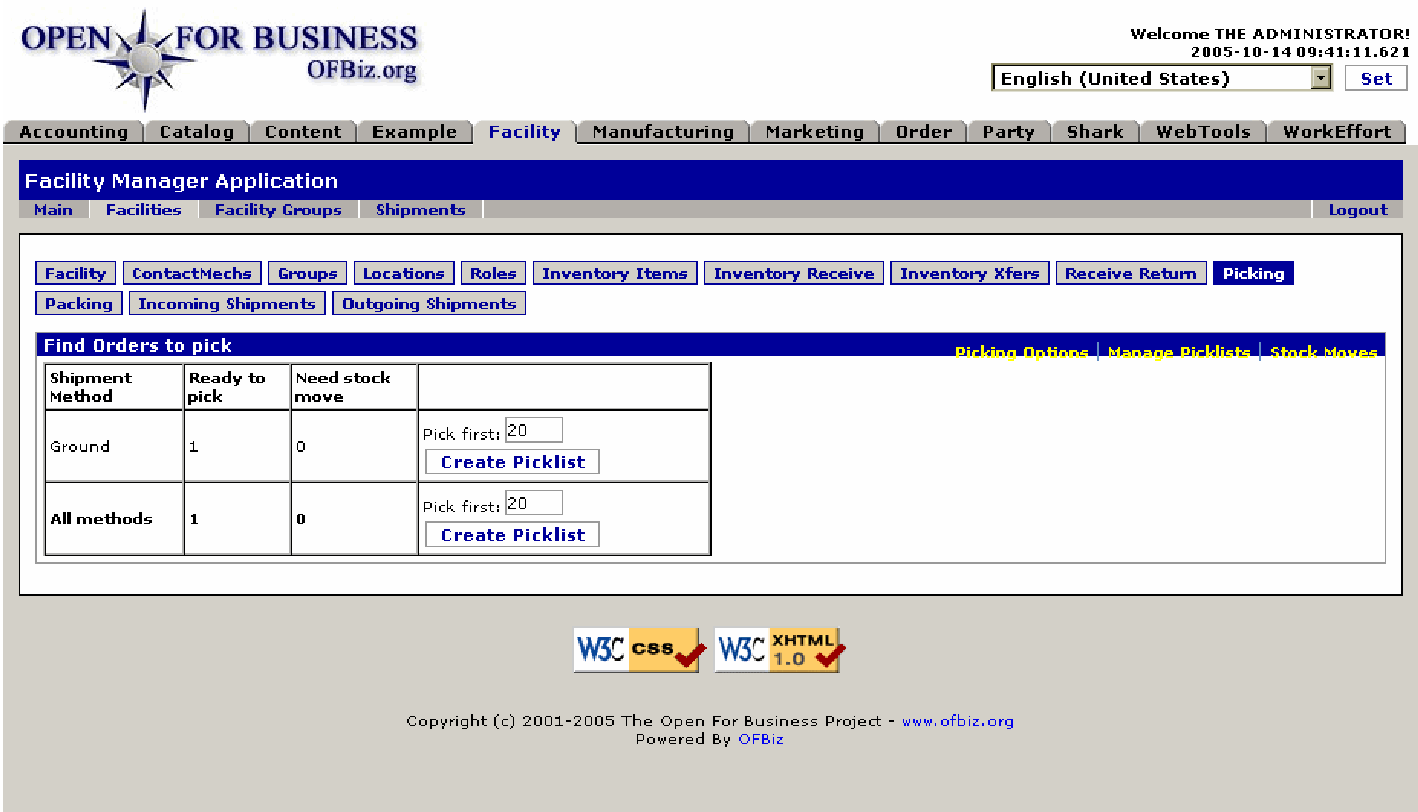
### .2.11.3.10 '... Items to receive.'

If there were additional items in the Return which have not yet been received by the Facility, they will be listed here.

When there are no more to receive, the statement reads, 'There are no items to receive.'

# 2.12 Picking tab

## .2.12.1 PicklistOptions




Categories of Orders ready to be Picked are displayed at this Picking Options screen.

## .2.12.2 link buttons

[Picking Options] [Manage Picklists] [Stock Moves] [Create Picklist] [Facility] [ContactMechs] [Groups] [Locations] [Roles] [Inventory] [Inventory Receive] [Inventory Xfers] [Receive Return] [Picking] [Packing] [Scheduling] [Incoming Shipments] [Outgoing Shipments]

## .2.12.3 Picking Options

After a [Create Picklist] button is selected, that line in the table no longer appears on this screen. Once a Picklist is created for a shipping method category, you can work it from the PicklistManage screen which follows.

### .2.12.3.1 Shipment Method

Specifies the shipping method such as Ground, Air, Next Day, etc.

### .2.12.3.2 Ready to pick

How many shipments are ready to pick?

### .2.12.3.3 Need stock move

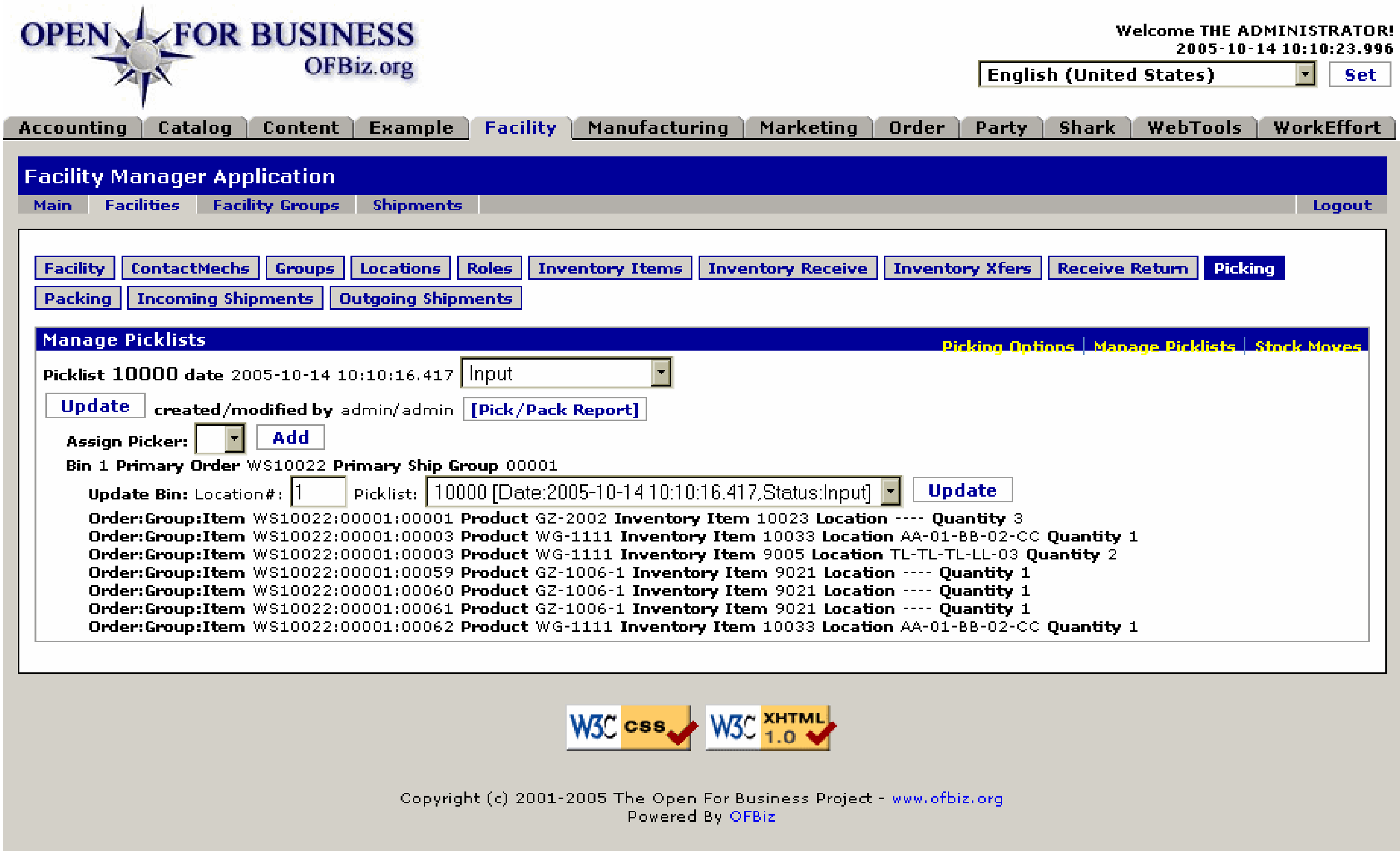
The number indicates how many shipments need a stock move. Note that if there is a need for a stock move, you should first go to Stock Moves sub-tab for this item.

### .2.12.3.4 Pick first __

Specify how many units to be picked at a time, e.g., the first 20, etc. If you are ready to work this item, click on [Create Picklist].

## .2.12.4 Manage Picklists

### .2.12.4.1 PickStarted




Although only one is shown here, all currently active Picklists will be displayed at this screen.

### .2.12.4.2 link buttons

[Picking Options] [Manage Picklists] [Stock Moves] [Update] [Add] [Pick/Pack Report] [Facility] [ContactMechs] [Groups] [Locations] [Roles] [Inventory] [Inventory Receive] [Inventory Xfers] [Receive Return] [Picking] [Packing] [Scheduling] [Incoming Shipments] [Outgoing Shipments]

### .2.12.4.3 Discussion

Within each Pick block, you have information provided to help the stock pickers find, assemble and group the product for the shipment. You can assign Pickers, change Status, identify or change the Bin number, and generate the Pick/Pack Report.

### .2.12.4.4 PicklistReportPage1

Picklist 10000 in Facility Web Store Warehouse [WebStoreWarehouse]

| Location | Product ID | To Pick | Quantity to Bin# |
|---|---|---|---|
| AA-01-BB-02-CC | Micro Chrome Widget [WG-1111] | 2 | 2 to #1 |
| TL-TL-TL-LL-03 | Micro Chrome Widget [WG-1111] | 2 | 2 to #1 |
| ---- | Open Gizmo (LGPL) [GZ-1006-1] | 3 | 3 to #1 |
| ---- | Square Gizmo [GZ-2002] | 3 | 3 to #1 |

Pick report generated in PDF to give to Picker or supervisor.

### .2.12.4.5 PicklistReportPage2

WS10022/00001

Bin 1 to Pack, Order ID: WS10022, Ship Group ID: 00001

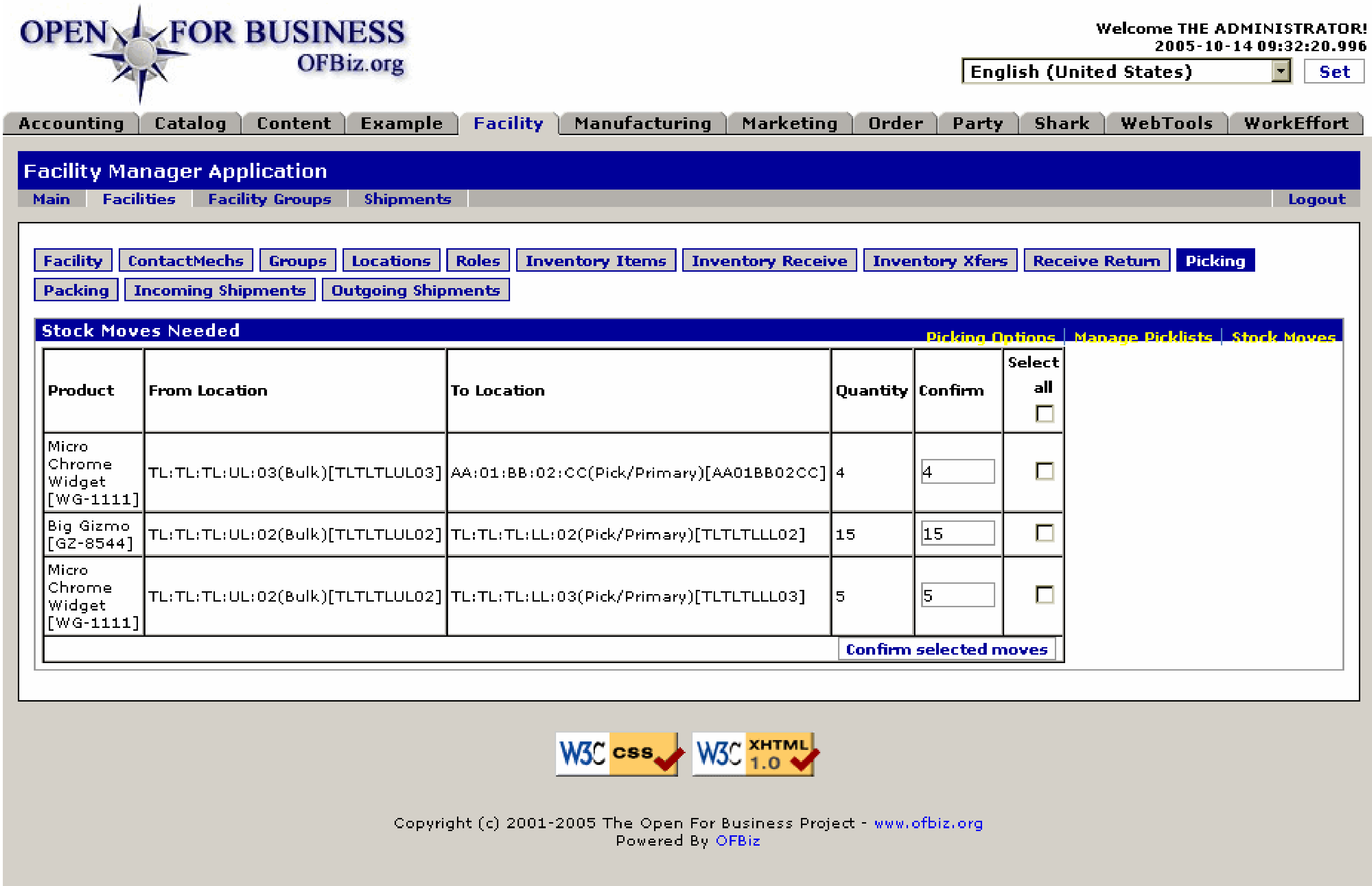
| Order Item | Product ID | To Pack | Inventory Avail: Not Avail: |
|---|---|---|---|
| 00001 | Square Gizmo [GZ-2002] | 3 | 10023:3: |
| 00003 | Micro Chrome Widget [WG-1111] | 1 | 10033:1: |
| 00003 | Micro Chrome Widget [WG-1111] | 2 | 9005:2: |
| 00059 | Open Gizmo (LGPL) [GZ-1006-1] | 1 | 9021:1: |
| 00060 | Open Gizmo (LGPL) [GZ-1006-1] | 1 | 9021:1: |
| 00061 | Open Gizmo (LGPL) [GZ-1006-1] | 1 | 9021:1: |
| 00062 | Micro Chrome Widget [WG-1111] | 1 | 10033:1: |

The Pack report is generated together with the Pick report; give copy to Packer or his Supervisor.

### .2.12.5 Stock Moves needed (table)

As moves are confirmed, they are processed and the line on this table is removed.

## .2.12.5.1 PickMoveStock




Here you will confirm stock movements and then authorize those movements in preparation for pending Stock Picks.

## .2.12.5.2 link buttons

[Confirm Selected Moves] [Picking Options] [Manage Picklists] [Stock Moves] [Facility] [ContactMechs] [Groups] [Locations] [Roles] [Inventory] [Inventory Receive] [Inventory Xfers] [Receive Return] [Picking] [Packing] [Scheduling] [Incoming Shipments] [Outgoing Shipments]

## .2.12.5.3 Product

Shows both the name and the Product ID.

## .2.12.5.4 From Location

The physical Location where the item is being relocated FROM.

### .2.12.5.5 To Location

The physical Location where the item is being relocated TO.

### .2.12.5.6 Quantity

How many.

### .2.12.5.7 Confirm

Enter the actual number moved to Confirm the move.

### .2.12.5.8 Select All

To select all items in the row, click the checkbox in the header; else check just those to be moved at this time.

## 2.13 Packing tab

### .2.13.1 PackOrder-find


Enter the Order Number AND the 'Primary Ship Group Seq Idtruc' number from the createShipment screen to proceed.

## .2.13.2 link buttons

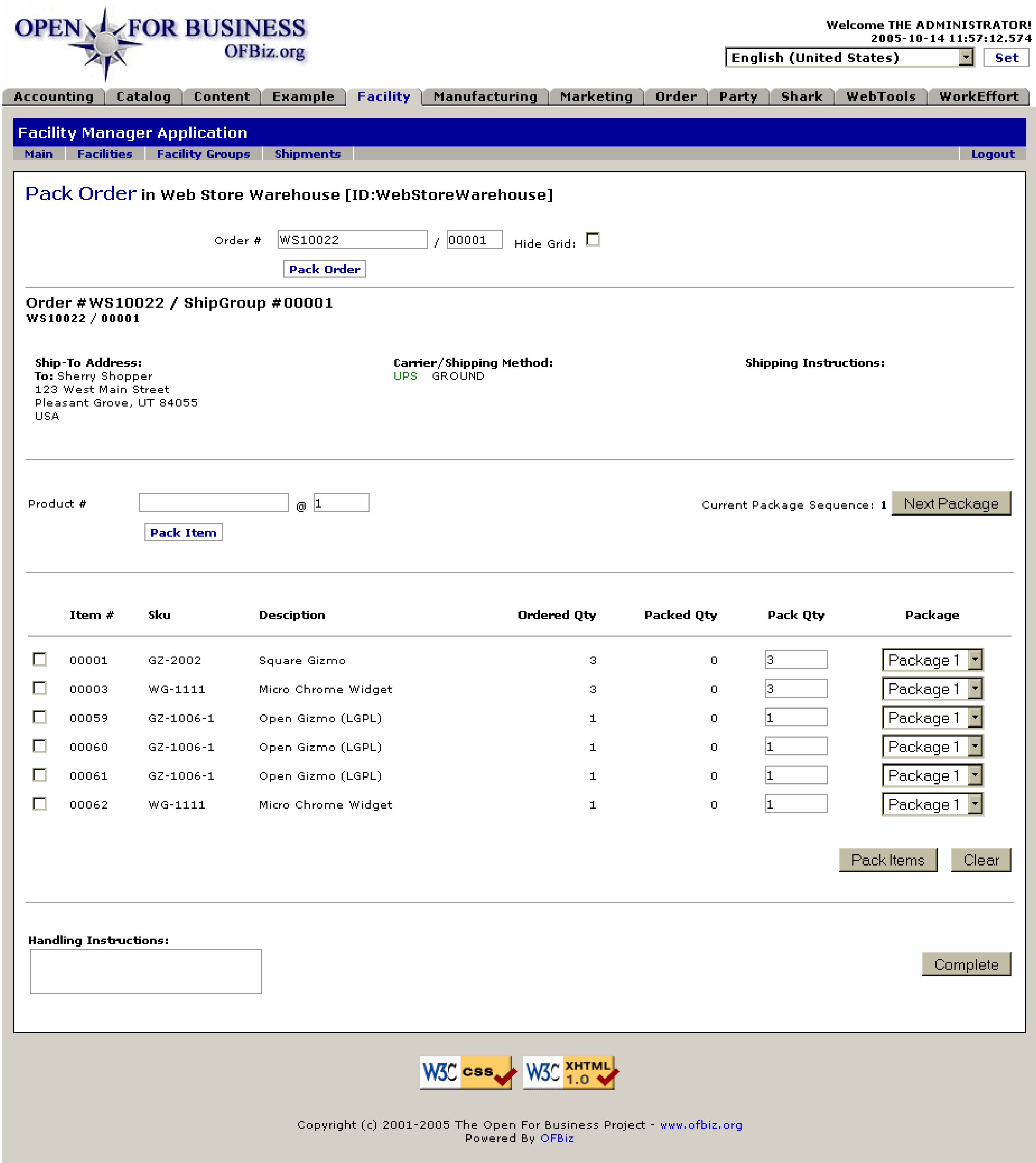
[Pack Order]

## .2.13.3 Discussion

After items are Picked they must be Packed. But before they can be Packed, the shipping documentation must be ready. To confirm that the paperwork has processed, you must enter the 'Primary Ship Group Seq Idtruc' in the line after the Order Number (as shown in the screen above) and that Sequence number must exist in the system before the following screen appears.

## .2.13.4 Packing Process

### .2.13.4.1 PackOrder-Found




Check the box on each line item to be packed, confirm the Pack Qty, and click [Pack Items].

## .2.13.4.2 link buttons

[Pack Order] [Next Package] [Pack Item] [Pack Items] [Clear] [Complete]

## .2.13.4.3 Shipping Information

### .2.13.4.3.1 Ship-To Address

Where the packages are headed.

### .2.13.4.3.2 Carrier / Shipping Method

How the packages will be transported to the destination.

### .2.13.4.3.3 Shipping Instructions

Additional instructions such as special handling, notification steps, whatever is outside the normal shipping procedures.

## .2.13.4.4 Individual item processing

When there is no Pack List as shown at the bottom of this screen, here is a method to pack item by item. Enter the Product ID and the quantity, then click [Pack Items] and go on to the next package.

## .2.13.4.5 Pack List packing

### .2.13.4.5.1 Item #

The sequence number in the packing list.

### .2.13.4.5.2 SKU

This would be the Product ID of the item being shipped.

### .2.13.4.5.3 Description

Generally, the name of the Product being shipped.

### .2.13.4.5.4 Ordered Qty

How many the customer is expecting to receive.

#### .2.13.4.5.5 Packed Qty

How many have been packed so far. Note: There may be incremental packing of orders when stock is not on hand for earlier attempts.

#### .2.13.4.5.6 Pack Qty

How many should be packed at this time.

#### .2.13.4.5.7 Package

Which package should the item go into? Select from the drop-down box.

### .2.13.4.6 Handling Instructions

Any special instructions to the Carrier are added here. Press the link [Complete] when you are finished with this screen.

## 2.14 Scheduling tab

### .2.14.1 Discussion

Under development.

### .2.14.2 link buttons

[Facility] [ContactMechs] [Groups] [Locations] [Roles] [Inventory] [Inventory Receive] [Inventory Xfers] [Receive Return] [Picking] [Packing] [Scheduling] [Incoming Shipments] [Outgoing Shipments]

## 2.15 Incoming Shipments tab

**This tab takes you to the higher level, major tab Shipments with current Incoming Shipments listed in a table.**

## 2.16 Outgoing Shipments tab

**This tab takes you to the higher level, major tab Shipments with current Outgoing Shipments listed in a table.**

# 3 Facility Groups

## .3.1 FindFacilityGroup


All Facility Groups from any Facility are presented at this screen. Click the ID or [Edit] to proceed.

## .3.2 link buttons

[New Group] [Edit]

## .3.3 Table of existing groups

### .3.3.1 Facility Group Name (ID)

Click on this Name and ID combination to edit the Group.

### .3.3.2 Facility Group Type

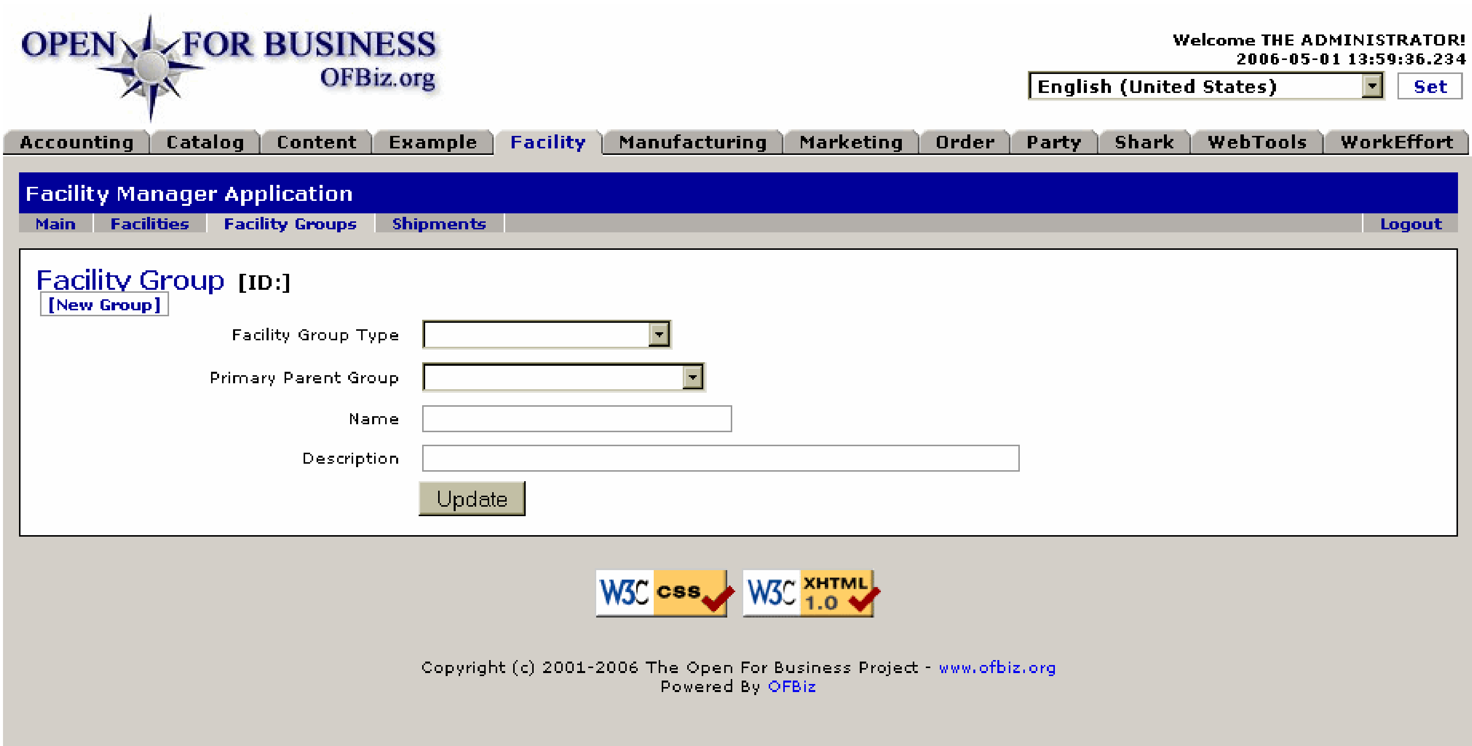
This Type could be Management Structure, Pricing Group, Manufacturing Engineers, Labor Union, whatever is programmed into the system.

### .3.3.3 Description

What differentiates this Group from all others?

## .3.4 New Group link

### .3.4.1 EditFacilityGroup-new




Create a new Facility Group at this screen. Select a Type and identify its Parent group first.

### .3.4.2 link buttons

[New Group] [Update]

### .3.4.3 Facility Group Type (drop-down box)

Select from the drop-down box. This Type could be Management Structure, Pricing Group, Manufacturing Engineers, Labor Union, whatever is programmed into the system.

### .3.4.4 Primary Parent Group (drop-down box)

All the existing Facility Groups are given in the drop-down list. Select from one of these.

### .3.4.5 Name

Give it a short, distinctive (but not cryptic) Name.

### .3.4.6 Description

Differentiate this Group from any other Group. Allow for the possibility that there may be sub-groups nested under this one.

## .3.5 Edit Facility Group

### .3.5.1 EditFacilityGroup


Edit the top-level details of a Facility Group at this screen; choose sub-tabs for further details.

## .3.5.2 link buttons

[New Group] [Update] [Facility Group] [Rollups] [Facilities] [Roles]

## .3.5.3 (edit) Facility Group ...

### .3.5.3.1 Facility Group ID ...

The assigned ID number with the given Name for this group. This cannot be changed without replacing the Group.

### .3.5.3.2 Facility Group Type (drop-down box)

If this needs to be changed, select from the drop-down box. This Type could be Management Structure, Pricing Group, Manufacturing Engineers, Labor Union, whatever is programmed into the system.

### .3.5.3.3 Primary Parent Group (drop-down box)

All existing Groups are listed in the drop-down box; a group can easily be re-assigned to another Group with this choice.

### .3.5.3.4 Name

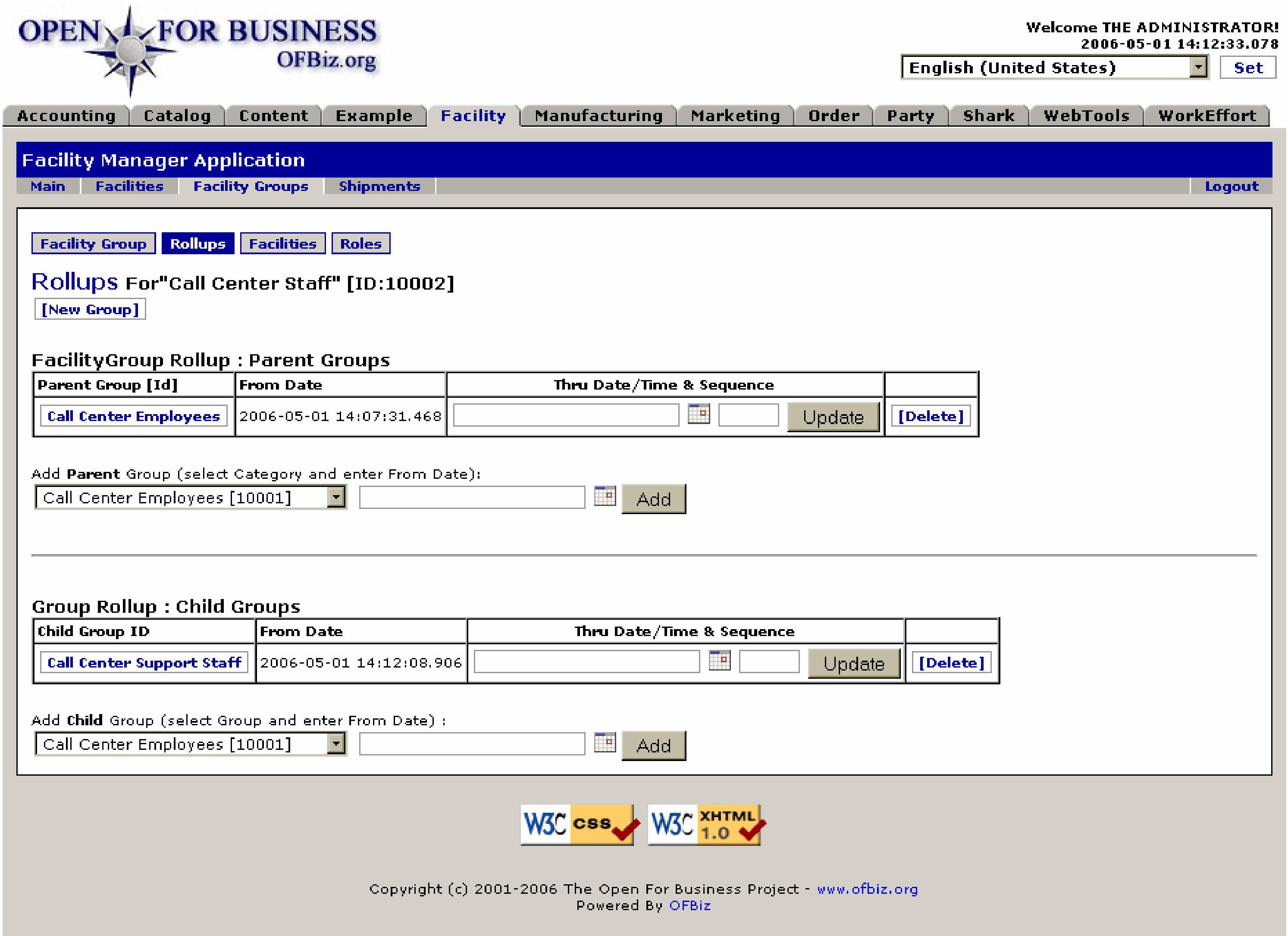
The Name can be changed here at any time.

### .3.5.3.5 Description

This should be a functional description, not just titles or people's names, because the Group should be able to survive changes in personnel and organization re-structuring.

# .3.5.4 Rollups

## .3.5.4.1 EditFacilityGroupRollup




Parent and Child relationships are established for the selected Group at this screen.

## .3.5.4.2 link buttons

[New Group] [Update] [Delete] [Add] [Facility Group] [Rollups] [Facilities] [Roles]

## .3.5.4.3 FacilityGroup Rollup : Parent Groups

### .3.5.4.3.1 Table of existing

#### .3.5.4.3.1.1 Parent Group ID

Click on the ID link to edit the Parent.

#### .3.5.4.3.1.2 From Date

When the relationship was established.

#### .3.5.4.3.1.3 Thru Date/Time and Sequence

A thru-date indicates the termination of this relationship. Enter such a date only if the Parent relationship should end at that time.

Sequence numbering would indicate priority or heirarchy within the set of Parents.

### .3.5.4.3.2 Add Parent Group

#### .3.5.4.3.2.1 Category (drop-down box)

This assignment is for a Parent Category that will have responsibility for, oversight of, or authority over the primary Group. There may be more than one such Parent group.

#### .3.5.4.3.2.2 From Date (popup calendar)

Generally this will be Now (the default), but you may assign a future date for delayed assignment, or a previous date for historical purposes.

## .3.5.4.4 Group Rollup : Child Groups

### .3.5.4.4.1 Table of existing

#### .3.5.4.4.1.1 Child Group ID

Click on the ID to edit the Child Group.

#### .3.5.4.4.1.2 From Date

When the assignment was made.

### .3.5.4.4.1.3 Thru Date/Time and Sequence

A thru-date indicates the termination of this relationship. Enter such a date only if the Child relationship should end at that time.

Sequence numbering would indicate priority or heirarchy within the set of Children.

## .3.5.4.4.2 Add Child Group

### .3.5.4.4.2.1 Category (drop-down box)

All the existing Groups are shown in the list. If there is no Child Group, but there needs to be one, click the [New Group] link and create one; it will then appear in this list.

### .3.5.4.4.2.2 From Date (popup calendar)

Generally this will be Now (the default), but you may assign a future date for delayed assignment, or a previous date for historical purposes.

## .3.5.5 Facilities

### .3.5.5.1 EditFacilityGroupMembers


Those Facilities within this Facility Group relationship are listed; add this Facility Group to another Facility with the tool.

### .3.5.5.2 link buttons

[New Group] [Active and Inactive (toggle)] [Update] [Delete] [Add] [Facility Group] [Rollups] [Facilities] [Roles]

### .3.5.5.3 Table-Group Member Maintenance

#### .3.5.5.3.1 Facility Name ID

Click on this ID and you will be at the Edit Facility screen.

#### .3.5.5.3.2 From Date and Time

When the assignment was made.

### .3.5.5.3.3 Thru Date/Time

A thru-date indicates the termination of this relationship. Enter such a date only if the relationship should end at that time.

### .3.5.5.3.4 Sequence

Sequence numbering would indicate priority or heirarchy among the Facilities.

## .3.5.5.4 Tool to Add FacilityGroupMember

### .3.5.5.4.1 Facility ID

Enter the exact ID for the Facility.

### .3.5.5.4.2 From Date

Defaults to Now. Set a future date if the membership is not to begin until later, or enter an earlier one for historical purposes.

## .3.5.6 Roles for facility group

### .3.5.6.1 EditFacilityGroupRoles


Add or delete Party associations with the Facility Group from this screen.

### .3.5.6.2 link buttons

[New Group] [Delete] [Add] [Facility Group] [Rollups] [Facilities] [Roles]

### .3.5.6.3 Table of existing roles

#### .3.5.6.3.1 Party ID

Click on the Party ID to go to the Party Manager for editing this Party.

#### .3.5.6.3.2 Role Type

Describes the role played by the Party in this Group relationship.

### .3.5.6.4 Tool to Add FacilityGroup Party Role

#### .3.5.6.4.1 Party ID

Enter an existing Party ID.

#### .3.5.6.4.2 Role Type (drop-down box)

Select from the drop-down box.

# 4 Shipments

Under the Shipments tab, entering the Primary Order ID number and clicking on [Update] will populate the screen with data already established for that Order. Once the system recognizes the Primary Order with which you are working, it will maintain that order while you move between the various tabs.

## .4.1 Shipments Process

### .4.1.1 Create the Shipment

Step 1 - In the Facility Manager: an empty shipment is created.

### .4.1.2 Assign items to the Shipment

Step 2 - In the Facility Manager: order items (also from different orders) are assigned to the shipment. These are all the products that we want to produce within a given period to meet the shipment's estimated ship date.

### .4.1.3 Status changed to Scheduled

Step 3 - Facility Manager: when the shipment plan is complete (i.e. all the products that we want to group together have been added) the shipment's status is changed to 'Scheduled'.

### .4.1.4 Scheduled Shipments displayed

Step 4 - Manufacturing manager: under the 'Shipment Plans' tab, all the scheduled shipments are shown. This is what is described in the Manufacturing Reference under Shipment Plans - Table.

### .4.1.5 Analyze needs for manufacturing

Step 5 - Manufacturing Manager: from the Shipment Plan > Detail page, you can generate a PDF report to help analyze the amount of materials (products) needed. From this you are better able to manufacture or assemble all the products in the shipment plan against the inventory levels of materials in the warehouse.

### .4.1.6 Resource adjustments

Step - 6 Manufacturing Manager: if there are not enough materials in the warehouse, the manufacturing process must be placed on hold. Through Purchase Orders (using the Order Manager) you should order any of the materials needed.

If material or components are not available, adjust the schedule to exclude the affected products from the shipment plan.

### .4.1.7 Create Production Runs

Step - 7 Manufacturing Manager: when you are sure that you have enough materials in your Warehouse to complete the manufacturing process, go to the JobShop screens and click on [Create all Production Runs]. All the production runs will be automatically created and they will have the same name SP_(shipmentPlanId) to make it easier to group them. At least one production run for each Shipment Plan item will be created.

### .4.1.8 Monitor from the Job Shop

Step - 8 Manufacturing Manager: monitor and control each Production Run in the JobShop screens as usual.

### .4.1.9 Manufactured products moved to Warehouse

Step-9 Manufacturing Manager: when a production run is completed, the finished (manufactured) products are put into the warehouse.

### .4.1.10 Completion

Step - 10 Manufacturing Manager: when all the production runs linked to the shipment plan are completed, the shipment plan is finished.

### .4.1.11 Release shipments

Step - 11 Facility Manager: in the shipment page, issue all products from the Warehouse as a normal shipment. Do this with confidence that all the products are in the warehouse, having been manufactured by the Production Runs.

## .4.2 New Shipment

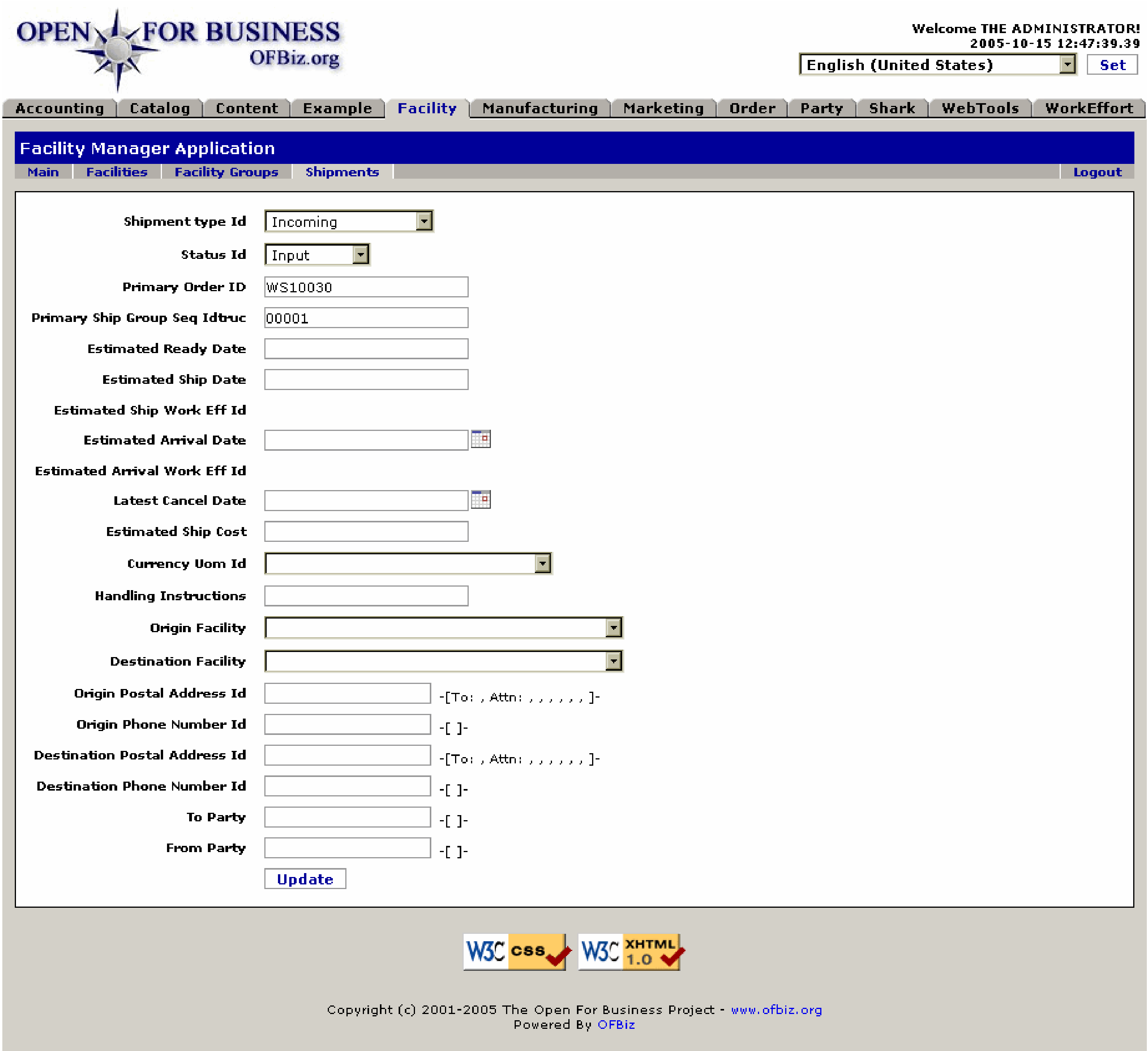
### .4.2.1 Discussion

'New' Shipments are not actually created here but through the ordering process. The purpose of this section (which only appears if unfulfilled orders exist) is to update the information in that Shipment ID established during the ordering process.

To come to this screen, in your new order page after clicking on the new Order Number, click on the link [New Shipment For Ship Group [00001]]. Immediately click on [Update] and the system will populate what information it already has. Enter the other details that you know, then click on [Update] again to save the data you have entered.

Note: the 'Primary Ship Group Seq Idtruc' needs to be entered under the Picking and Packing tabs to complete those aspects of the shipping process.

## .4.2.2 EditShipment




The first screen after clicking on the [New Shipment For Ship Group ...] link in the completed Order screen.

## .4.2.3 link buttons

[Update]

### .4.2.4 Shipment ID

Generated when the shipment is created; cannot be changed. This number will not appear until after you have clicked on the [Update] link the first time.

### .4.2.5 Shipment Type ID(drop-down box)

'Shipment' by definition means the relocation of items. It could be incoming stock, you returning merchandise to a vendor, the shipment of product as part of a sale, etc.

This drop-down box could have the following selections:

- Incoming
- Outgoing
- Sales Return
- Sales Shipment
- Purchase Shipment
- Purchase
- Return
- Drop Shipment
- Transfer

### .4.2.6 Status ID (drop-down box)

1. Be very sure of any changes to the status of this order before making a change to this status.
2. Status could be any of the following:

- ... (meaning 'undetermined')
- Input
- Scheduled
- Picked
- Packed
- Shipped
- Delivered
- Canceled

### .4.2.7 Primary Order ID

Should have been automatically populated when this screen was pulled up.

### .4.2.8 Primary Ship Group Seq Idtruc

When an order is divided among multiple recipients, each recipient's portion of the order is processed as a Ship Group. This number identifies which of those groups is being reported here. This number is asked for when you are working in the Picking and Packing sections of the Facility manager.

### .4.2.9 Estimated Ready Date

If shipment depends upon completion of another event, indicate here when the product will be available to fulfill this shipment.

### .4.2.10 Estimated Ship Date

If shipment depends upon completion of another event, indicate here when the product will be available to ship.

### .4.2.11 Estimated Ship Work Eff ID

This is the calendar event under the Work Effort manager, automatically generated when the this Shipment is successfully Updated.

### .4.2.12 Estimated Arrival Date (popup calendar)

When you can confidentally estimate when the shipment should arrive, enter the date here.

### .4.2.13 Estimated Arrival Work Eff ID

An Arrival Event has been created by the order process in the Work Effort Manager - Calendar section. Click on this number to go to that Event to edit or modify the Calendar Event Details.

### .4.2.14 Latest Cancel Date (popup calendar)

This would be the latest date the order can be canceled before it is committed to the shipping company.

### .4.2.15 Estimated Ship Cost

Cost of shipping, generally as set forth on the Order form. Expressed in the currency set forth below under Currency UOM ID.

### .4.2.16 Currency Uom ID

The national currency forming the basis of this order.

### .4.2.17 Handling Instructions

Any instructions for handling outside of the normal procedures can be documented here.

### .4.2.18 Origin Facility (drop-down box)

Generally populated automatically when this order is created, you can select from any of the existing Facilities from the drop-down box. Would be useful especially if the order originated with one facility but must be fulfilled from another.

### .4.2.19 DestinationFacility (drop-down box)

If the shipment is not going to a customer but rather to another Facility, select it from the drop-down list.

### .4.2.20 Origin Postal Address ID

This is the ID established in the Party Manager for the Postal Address of the originating Facility.

### .4.2.21 Origin Phone Number ID

This is the ID established in the Party Manager for the Phone Number of the originating Facility.

### .4.2.22 Destination Postal Address ID

This is the ID established in the Party Manager for the Postal Address of the destination.

### .4.2.23 Destination Phone Number ID

This is the ID established in the Party Manager for the Phone Number of the destination.

### .4.2.24 To Party

The Party ID of the Party receiving the shipment.

### .4.2.25 From Party

This would generally be the ID of the Facility from which the shipment originates.

### .4.2.26 Created Date

Date this Shipment document was created.

### .4.2.27 Created By User Login

The User Login of the party creating this Shipment document.

### .4.2.28 Last Modified Date

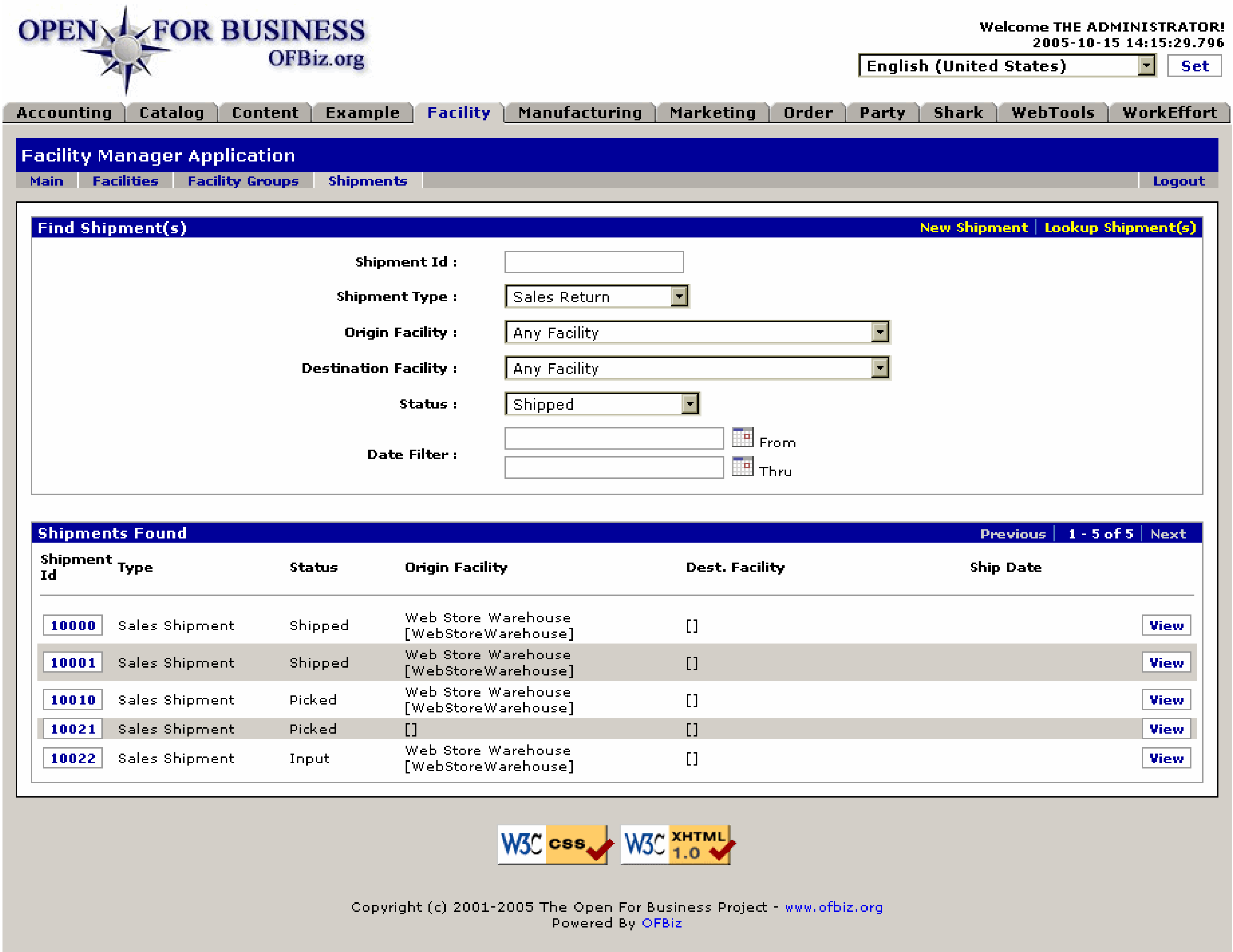
Each time this Shipment document is modified, the date will be updated here.

### .4.2.29 Last Modified By User Login

The User Login of whomever last modified this Shipping document.

## .4.3 Find Shipment(s)

### .4.3.1 FindShipment




The top "Find Shipments" part of this screen greets you upon opening the Shipments tab. Results are shown at the bottom for a successful search on type "Sales Return." Click on the Shipment ID or [View] to proceed with editing.

### .4.3.2 link buttons

[New Shipment] [Lookup Shipments] [View] [Previous] [Next]

### .4.3.3 Shipment ID

If you know the Shipment ID here, enter it here.

### .4.3.4 Shipment Type (drop-down box)

Select from among the following types:

- —
- Any Shipment Type
- Drop Shipment
- Incoming
- Outgoing
- Purchase Return
- Purchase Shipment
- Sales Return
- Sales Shipment
- Transfer

### .4.3.5 Origin Facility (drop-down box)

Select a facility from the drop-down list.

### .4.3.6 Destination Facility (drop-down box)

Select a facility from the drop-down list.

### .4.3.7 Status (drop-down box)

Select a status from among the following:

- Any Shipment Status
- Input
- Scheduled
- Picked
- Packed
- Shipped
- Delivered
- Cancelled

### .4.3.8 Date Filter

#### .4.3.8.1 From (popup calendar)

In the top (From) line, enter the earliest date the Shipment you are looking for could have originated.

#### .4.3.8.2 Thru (popup calendar)

In the bottom line, enter the latest date the shipment could have been created.

### .4.3.9 Shipments Found

All the shipments meeting the criteria you have entered will be listed here. If none appear, try to search with fewer criterium. So long as one of the search parameters is specified (for example, 'Sales Shipments'), there should be returns.

#### .4.3.9.1 Shipment ID

Click on the ID to see this Shipment under the View tab; same effect as clicking on the [View] link at the end of the line.

#### .4.3.9.2 Type

Will be from among one of the following:

- —
- Any Shipment Type
- Drop Shipment
- Incoming
- Outgoing
- Purchase Return
- Purchase Shipment
- Sales Return
- Sales Shipment
- Transfer

#### .4.3.9.3 Status

Will be from among the following:

- Any Shipment Status

- Input
- Scheduled
- Picked
- Packed
- Shipped
- Delivered
- Cancelled

#### .4.3.9.4 Origin Facility

The Facility where the Shipment originated from.

#### .4.3.9.5 Dest. Facility

If being sent to an established Facility ID, this will be shown here.

#### .4.3.9.6 Ship Date

If already shipped or scheduled, the shipping date will be here.

## .4.4 (Shipments handling tabs)

Once the specific shipment has been selected, you are taken to these screens for managing the details of the shipment.

### .4.4.1 View

Except for the link [Generate Shipment Manifest Report], this screen is primarily to provide an overview of all the current details on the selected Shipment. As you select any of the other tabs, the appropriate information will be populated within those screens for this shipment. You can always return to this tab to review all the details again in one place.

## .4.4.1.1 ViewShipment


This will always present the most current details of the Order Shipment. Picking and Packing items will appear until complete.

## .4.4.1.2 link buttons

[Generate Shipment Manifest Report] [View] [Edit] [Shipment Plan] [Order Items] [Items] [Packages] [Route Segments]

### .4.4.1.3 Shipment particulars

#### .4.4.1.3.1 Shipment ID

The number generated by the system to identify this shipment.

#### .4.4.1.3.2 Shipment Type

What type of shipment is presented with one of these IDs:

- Incoming
- Outgoing
- Sales Return
- Sales Shipment
- Purchase Shipment
- Purchase Return
- Drop Shipment
- Transfer

#### .4.4.1.3.3 Status

#### .4.4.1.3.4 Primary Order ID

Which Sales Order or Purchase Order led to the creation of this shipment.

#### .4.4.1.3.5 Primary Ship Group Seq ID

When an order is divided among multiple recipients, each recipient's portion of the order is processed as a Ship Group. This number identifies which of those groups is being reported here.

#### .4.4.1.3.6 Estimated Dates

##### .4.4.1.3.6.1 Ready

When the elements of the shipment should be ready to be picked up by the Carrier.

##### .4.4.1.3.6.2 Ship

When the Carrier is expected accept the shipment.

##### .4.4.1.3.6.3 Arrival

When the shipment should arrive at its destination.

### .4.4.1.3.7 Latest Cancel Date

The latest possible date that this Shipment can be stopped from from processing through the system to the Carrier.

### .4.4.1.3.8 Estimated Ship Cost

What the shipment is expected to cost.

### .4.4.1.3.9 Handling Instructions

Any extra instructions for handling the shipment or its contents.

### .4.4.1.3.10 Facilities

#### .4.4.1.3.10.1 Origin

The Facility from where the shipment is originating.

#### .4.4.1.3.10.2 Destination

If destined to another Facility, which one.

### .4.4.1.3.11 Parties

#### .4.4.1.3.11.1 To:

The Party ID of the recipient of the Shipment.

#### .4.4.1.3.11.2 From:

If other than a Facility, such as with a Purchase Return, the ID of the party from whom the Shipment is coming.

### .4.4.1.3.12 Addresses

#### .4.4.1.3.12.1 Origin:

Address from where the Shipment is being sent.

#### .4.4.1.3.12.2 Destination:

Address to where the Shipment is being sent.

#### .4.4.1.3.13 Phone Numbers

##### .4.4.1.3.13.1 Origin

Phone number at the place where the Shipment is coming.

##### .4.4.1.3.13.2 Destination

Phone number at the place to which the Shipment is headed.

#### .4.4.1.3.14 Created by and date

Who created this Shipment and when.

#### .4.4.1.3.15 Last Updated by and date

Each time the Shipment is changed, the Party making a change and when the change was made are recorded here.

### .4.4.1.4 Item details

The details of the Shipment will appear here until the items are picked and packed into shipping packages.

### .4.4.1.5 Package details (vary)

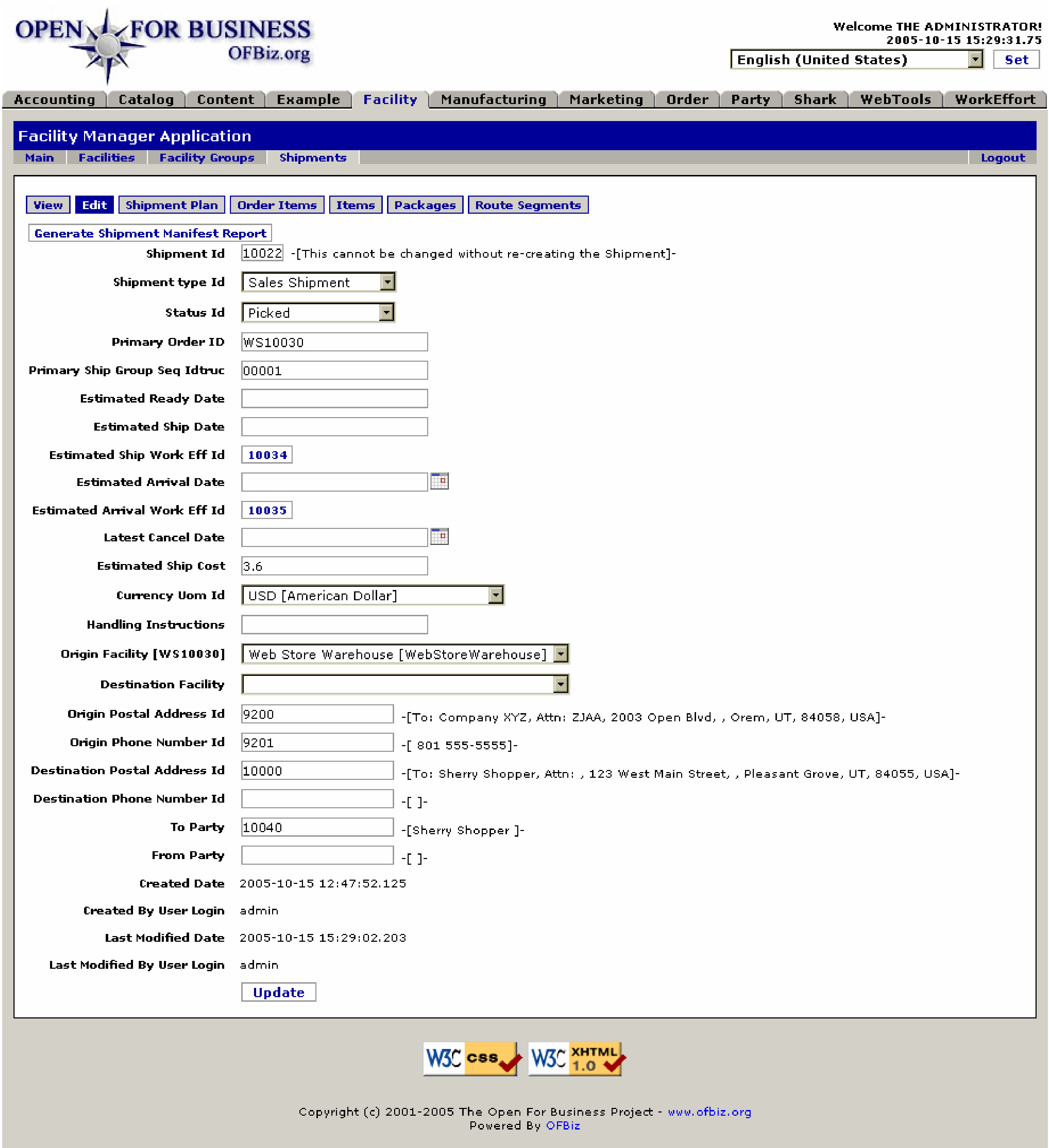
As the Packages are assembled and packed, the contents will appear here until complete. Once the Packages are gathered into a Shipment, they will no longer appear.

### .4.4.1.6 Shipping details (vary by carrier)

Once the Packages are assembled into a Shipping Segment, details of that appear here.

### .4.4.2 Edit

#### .4.4.2.1 EditShipment-Updated




After pressing the [Update] button, this screen reflects all the known information to this point. Edit here as needed.

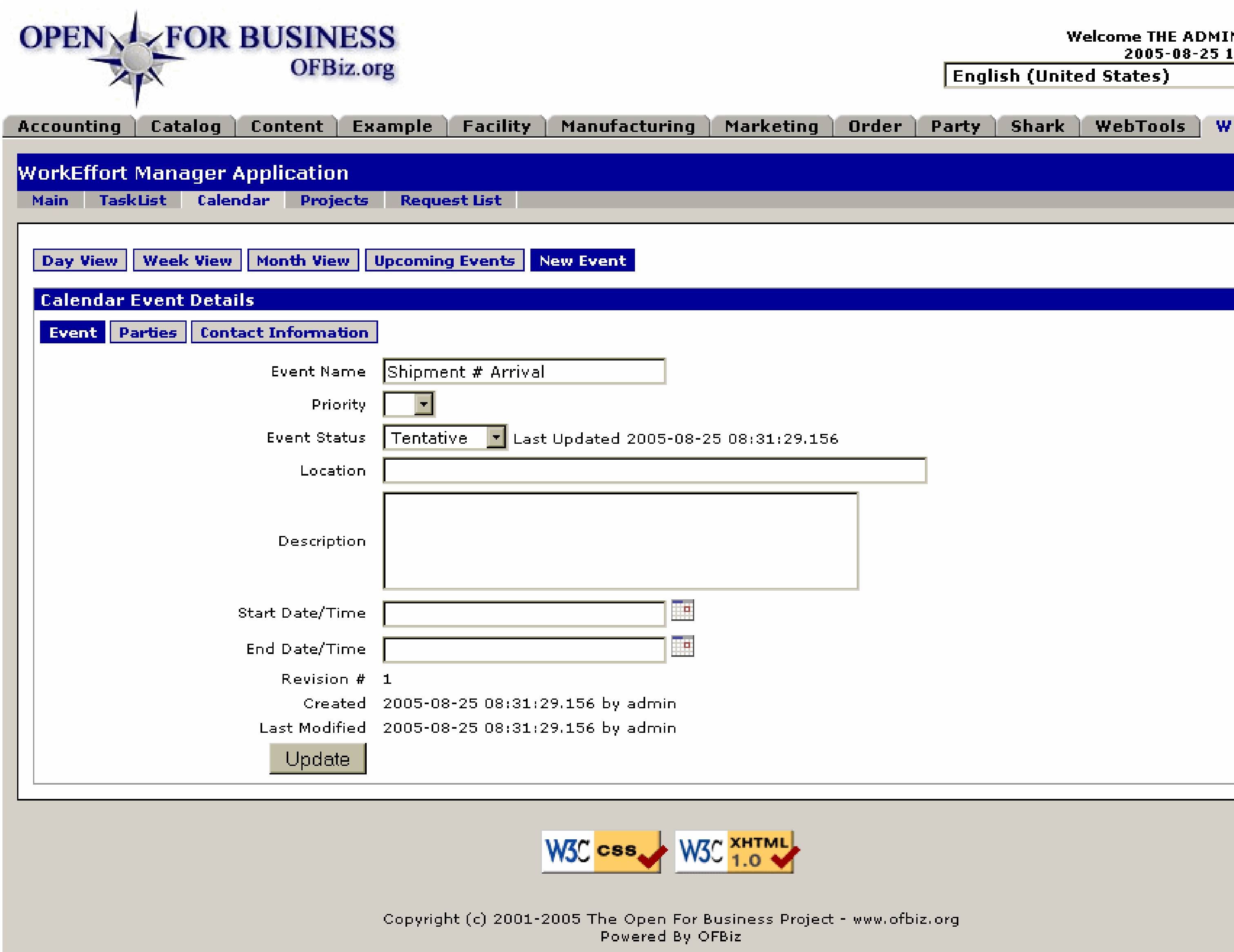
## .4.4.2.2 link buttons

[Generate Shipment Manifest Report] [Update] [View] [Edit] [Shipment Plan] [Order Items] [Items] [Packages] [Route Segments]

## .4.4.2.3 Discussion

These fields were each discussed above under 'New Shipment.'

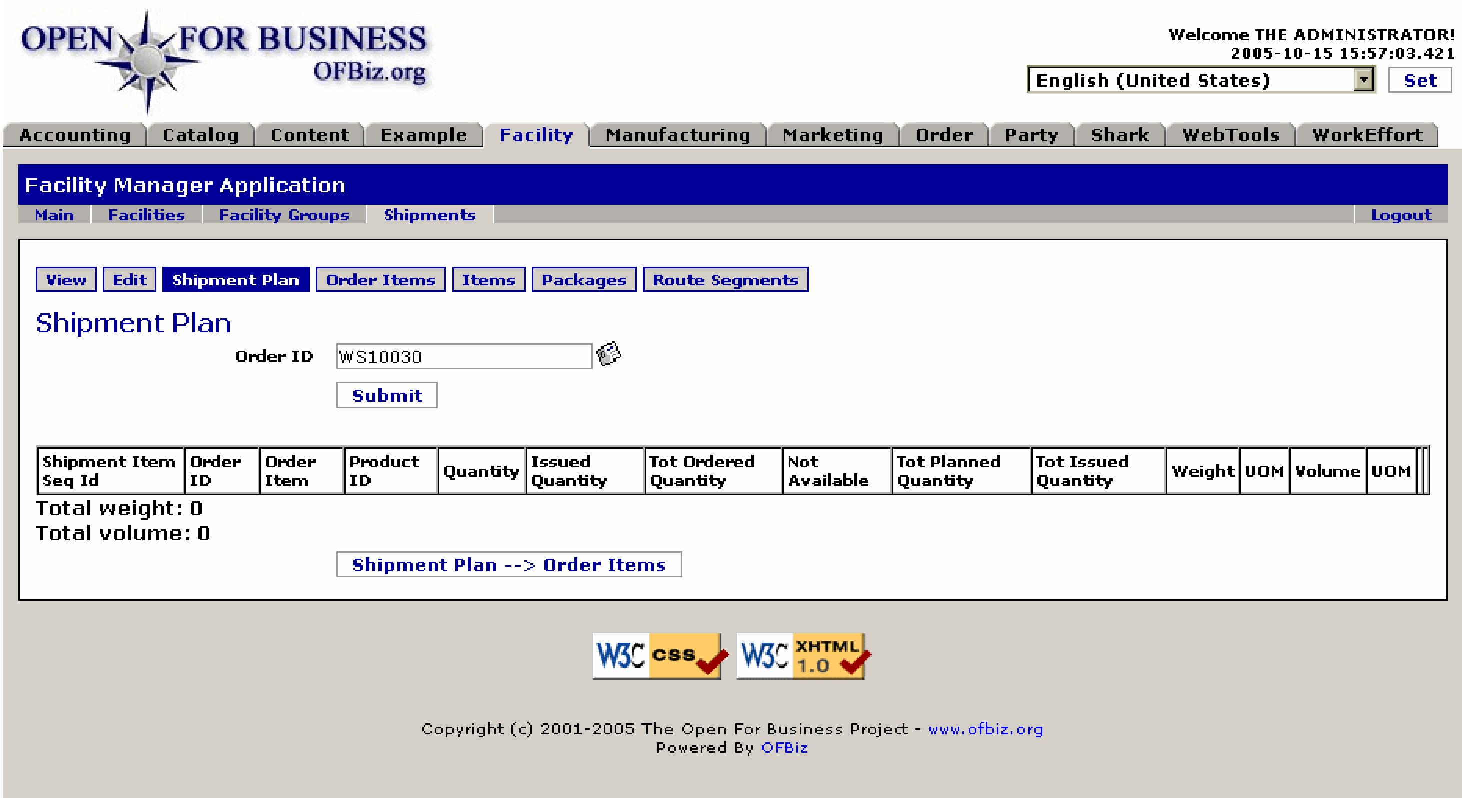
## .4.4.2.4 Estimated Arrival Work Eff Id




This is a view of the Work Effort event ID - updates the calendar with changes.

# .4.4.3 Shipment Plan

## .4.4.3.1 EditShipmentPlan-find




Enter the Order ID and click on [Submit] to bring up the Shipment Plan.

## .4.4.3.2 link buttons

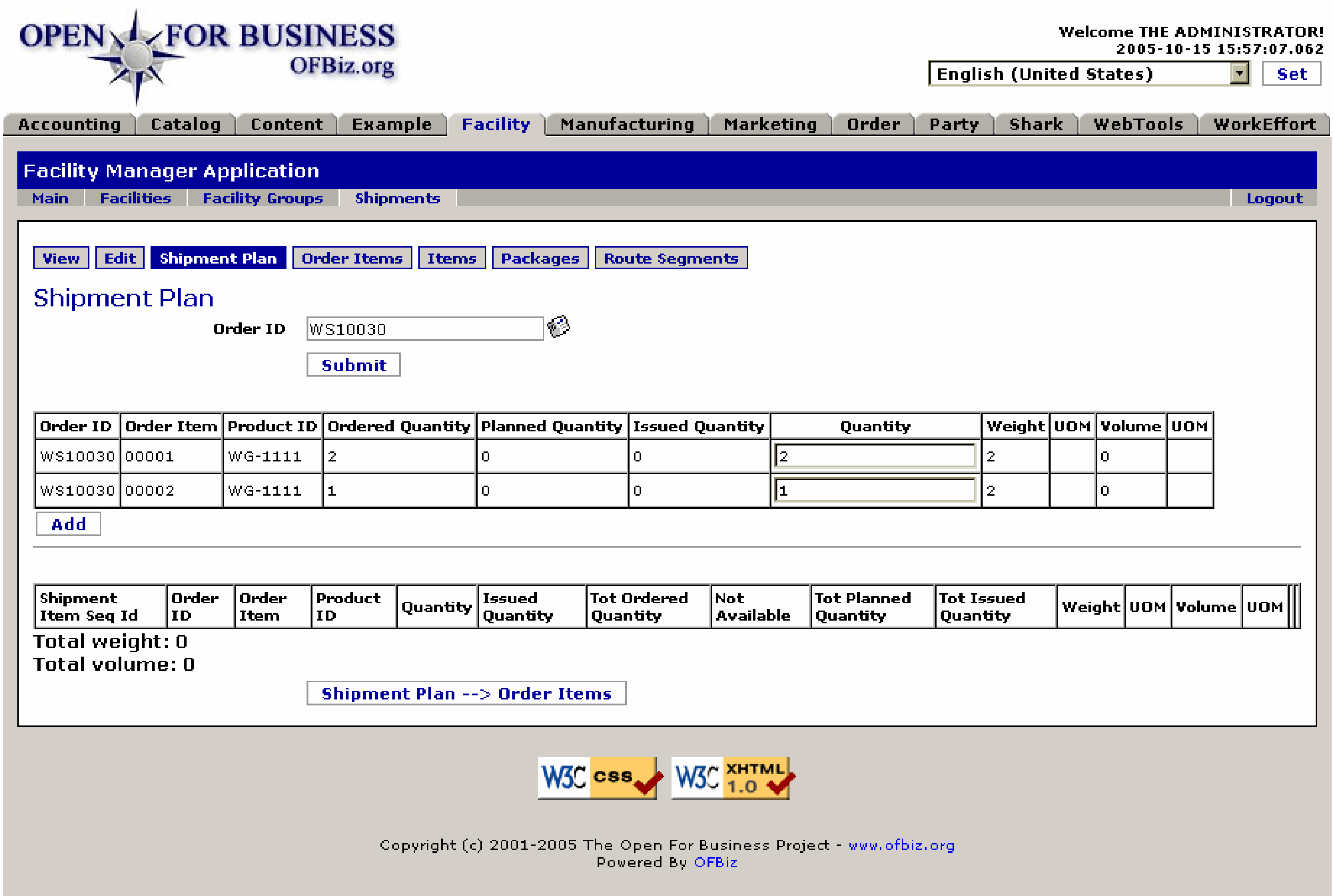
[Submit] [Shipment Plan --> Order Items] [View] [Edit] [Shipment Plan] [Order Items] [Items] [Packages] [Route Segments]

## .4.4.3.3 Order ID

Enter the ID of the order here, then click [Submit] to view the Shipment Plan.

## .4.4.3.4 Shipment Plan - edit screen

### .4.4.3.4.1 EditShipmentPlan




View the items planned for shipment from this screen. The link [Shipment Plan --> Order Items] takes you to the next step.

### .4.4.3.4.2 link buttons

[Submit] [Add] [Shipment Plan --> Order Items] [View] [Edit] [Shipment Plan] [Order Items] [Items] [Packages] [Route Segments]

### .4.4.3.4.3 Order ID

The original Order number.

### .4.4.3.4.4 Order Item

Which of the items is being presented on this line.

### .4.4.3.4.5 Product ID

The ordered Product as called for on this line of the Order.

### .4.4.3.4.6 Ordered Quantity

How many were ordered or added to the Order by a Promotion on this line.

### .4.4.3.4.7 Planned Quantity

How many you plan to ship with this order. This will be changed when the Issued Quantity is equal to the Ordered Quantity through the subsequent processes. Your capacity to fulfill this item of the order will be limited by inventory and other restrictions.

### .4.4.3.4.8 Issued Quantity

As the items are issued elsewhere, this number will change.

### .4.4.3.4.9 Quantity change window

You can edit this field to reflect the quantity you wish to fulfill. The quantity populated here is what the system expects to issue.

### .4.4.3.4.10 Weight

Weight per unit of product.

### .4.4.3.4.11 (Weight) UOM

Whether the weight is measured in grams, ounces, pounds or kilograms should be indicated here.

### .4.4.3.4.12 Volume

If the volume of the product is an issue in shipping, it should be given here.

### .4.4.3.4.13 (Volume) UOM

Unit of measure for the volume: cubic centimeters, cubic inches, etc.

## .4.4.3.5 Sequence Items

If the Shipment Plan includes subordinate Sequence Items, they will be displayed in this table under the following headings:

- ProductShipmentItemSeqID
- Order ID
- Order Item

- Product ID
- Quantity
- Issued Quantity
- Total Ordered Quantity
- Not Available
- Total Planned Quantity
- Total Issued
- Quantity
- Weight
- UOM
- Volume
- UOM

## .4.4.3.6 Shipment Plan --> Order Items link

Takes you to the next tab --> 'Order Items' with this Shipment Plan.

## .4.4.4 Order Items

### .4.4.4.1 AddItemsFromOrder


If not already populated in the table, associate the Order ID with the Ship Group ID number, then click [Select].

### .4.4.4.2 link buttons

[Select] [Issue All] [View] [Edit] [Shipment Plan] [Order Items] [Items] [Packages] [Route Segments]

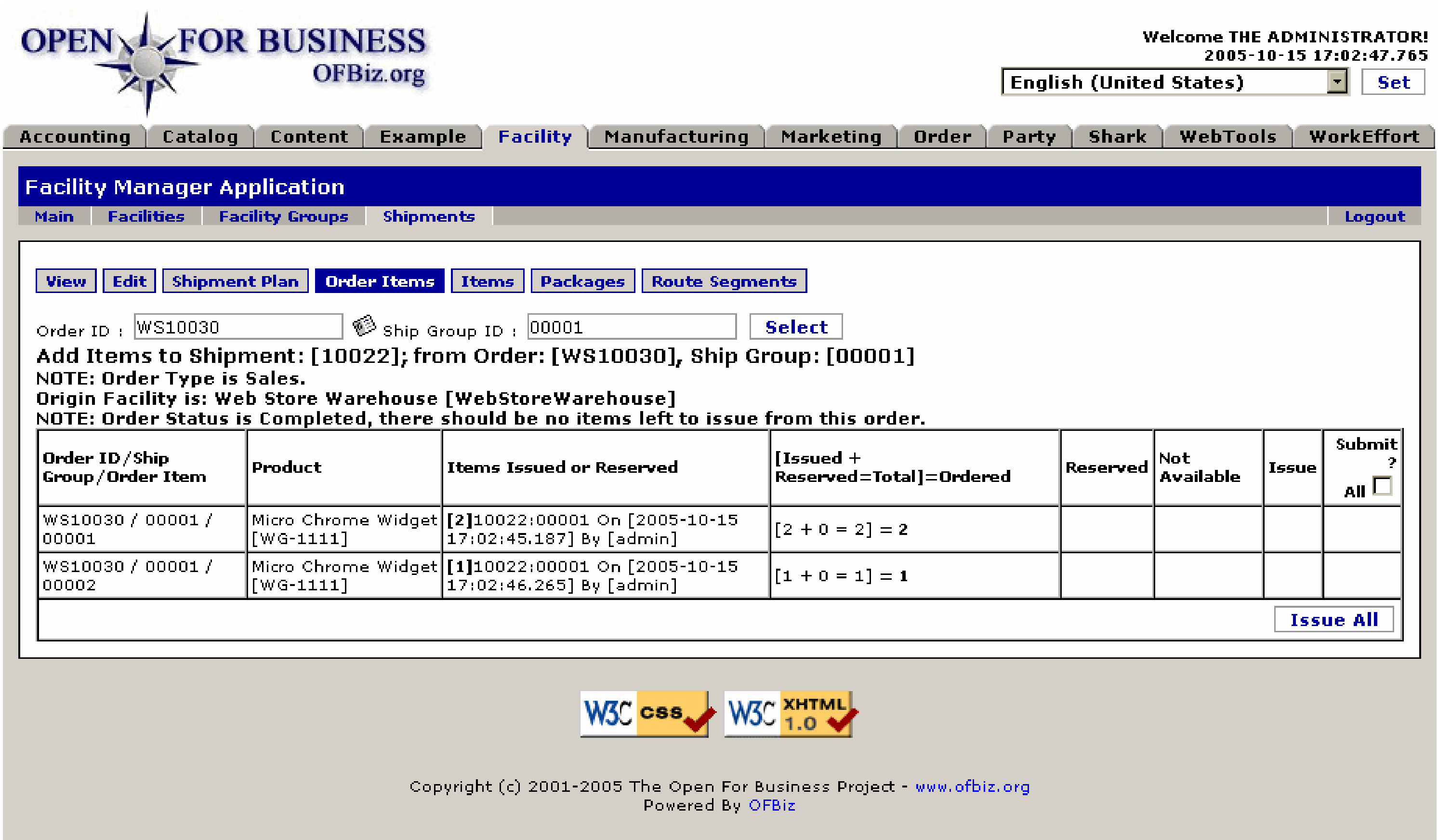
### .4.4.4.3 Discussion

First you Select the Order ID and the Ship Group ID; next you check the boxes for items you want to Issue and click on the [Issue] button. That will take you to the following screen.

## .4.4.4.4 Add Items to Shipment

Once you have selected (to confirm) the items for this Plan, click on [Issue All] to be taken to the next screen.

### .4.4.4.4.1 issueOrderItemShipGrpInvResToShipment




This screen confirms the issuance or reservation of items; upon completion the order moves forward.

### .4.4.4.4.2 link buttons

[Select] [Issue All] [View] [Edit] [Shipment Plan] [Order Items] [Items] [Packages] [Route Segments]

### .4.4.4.4.3 Order ID / Ship Group / Order Item

Identifies the Item in relation to the Ship Group and the Order ID.

### .4.4.4.4.4 Product

Confirms the Product ID for this Item.

#### .4.4.4.4.5 Items Issued or Reserved

Gives the quantity [in brackets], and the action numbers which resulted in this Issue or Reservation of product.

#### .4.4.4.4.6

(Issued + Reserved=Total) = Ordered

Portrays the math for the relationship between Issued, Reserved, their combined Total with the amount Ordered.

#### .4.4.4.4.7 Reserved

States how many are Reserved against future stock receipts or production, if any.

#### .4.4.4.4.8 Not Available

Shortages against the Ordered quantity are stated here, if any.

#### .4.4.4.4.9 Issue

Before the items were issued above, this reflected the intended Issue which has since been fulfilled.

#### .4.4.4.4.10 Submit All? (Check box)

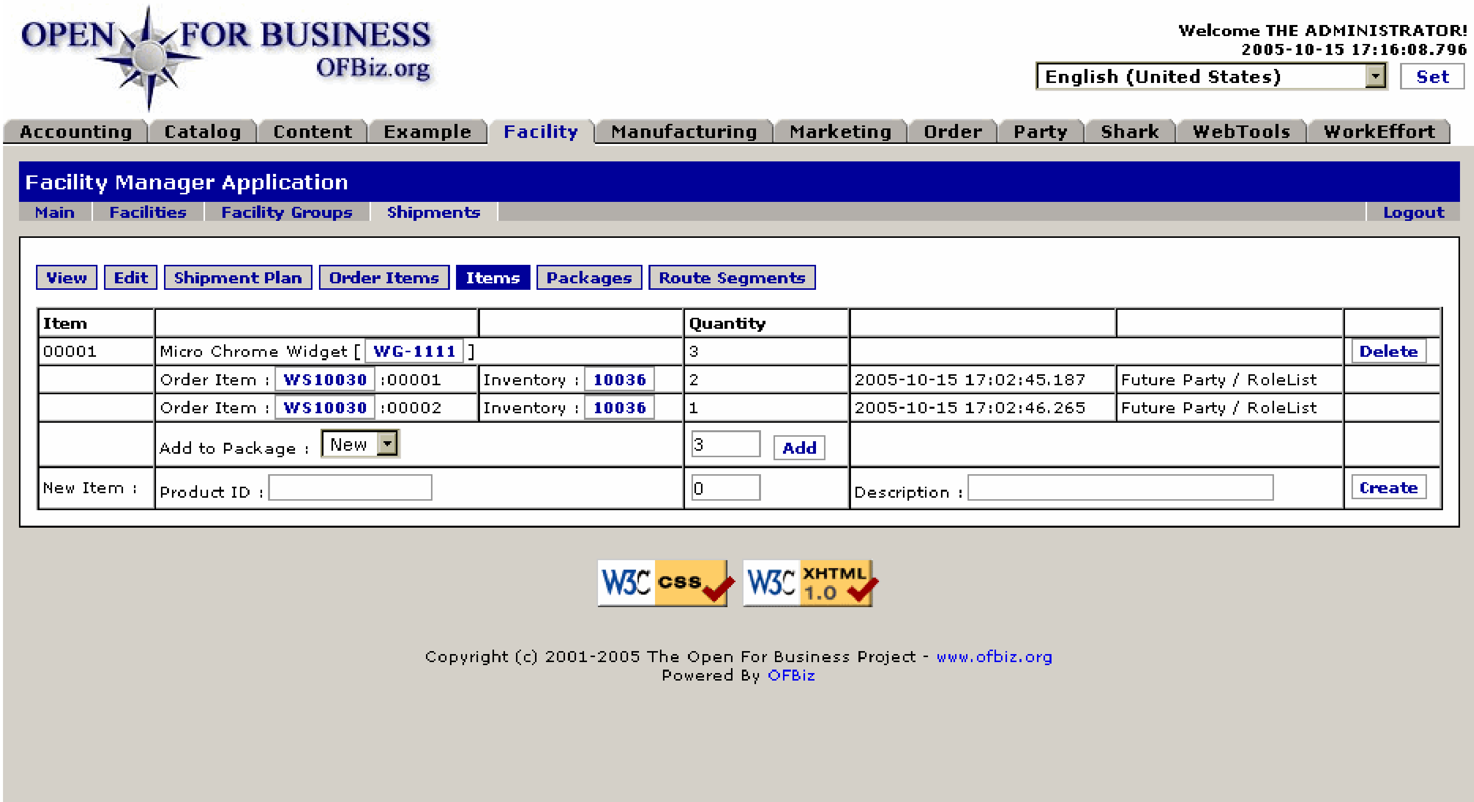
This is the column where boxes could be checked to approve the submittal of the items on this line.

## .4.4.5 Items

### .4.4.5.1 Items

Presentation of this screen dependent upon nature and type of order. You may be able to add another product to the order from this screen.

## .4.4.5.2 EditShipmentItems




Add, confirm or delete Shipment Items for the shipping Package here.

## .4.4.5.3 link buttons

[Add] [Delete] [Create] [View] [Edit] [Shipment Plan] [Order Items] [Items] [Packages] [Route Segments]

## .4.4.5.4 Item

Original Item number from the Order.

## .4.4.5.5 (item details)

Specifics on the Order Item are given here. In this case, the customer requested that each item be in a separate package. Furthermore, while only 2 were ordered, there was a promotional giveaway for the identical item, resulting in a total of 3.

There is also a place to add another item if needed. This way if the customer calls in an additional order during the shipping process, it can be added to the original order without having to re-create the entire set.

### .4.4.5.6 Quantity

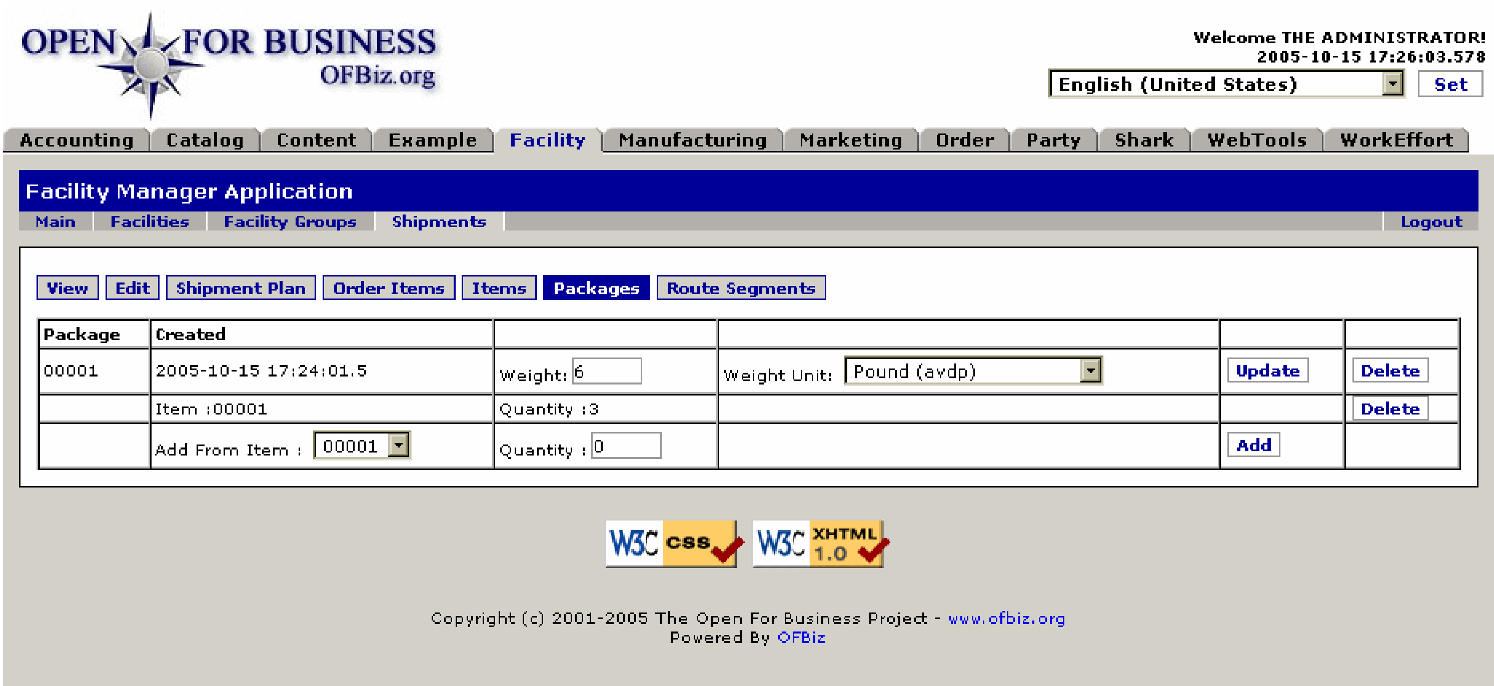
You MUST click to Add the Items into the package before this can proceed to the Packing stage.

### .4.4.5.7 Other details

Transaction dates and other details can be shown here.

## .4.4.6 Packages

### .4.4.6.1 EditShipmentPackages




Setting the Shipment Package information such as weight and tracking numbers.

### .4.4.6.2 link buttons

[Update] [Delete] [Add] [View] [Edit] [Shipment Plan] [Order Items] [Items] [Packages] [Route Segments]

### .4.4.6.3 Package #

The assigned Package number; there could be several in a shipment.

### .4.4.6.4 Created

Format: YYYY-MM-DD time

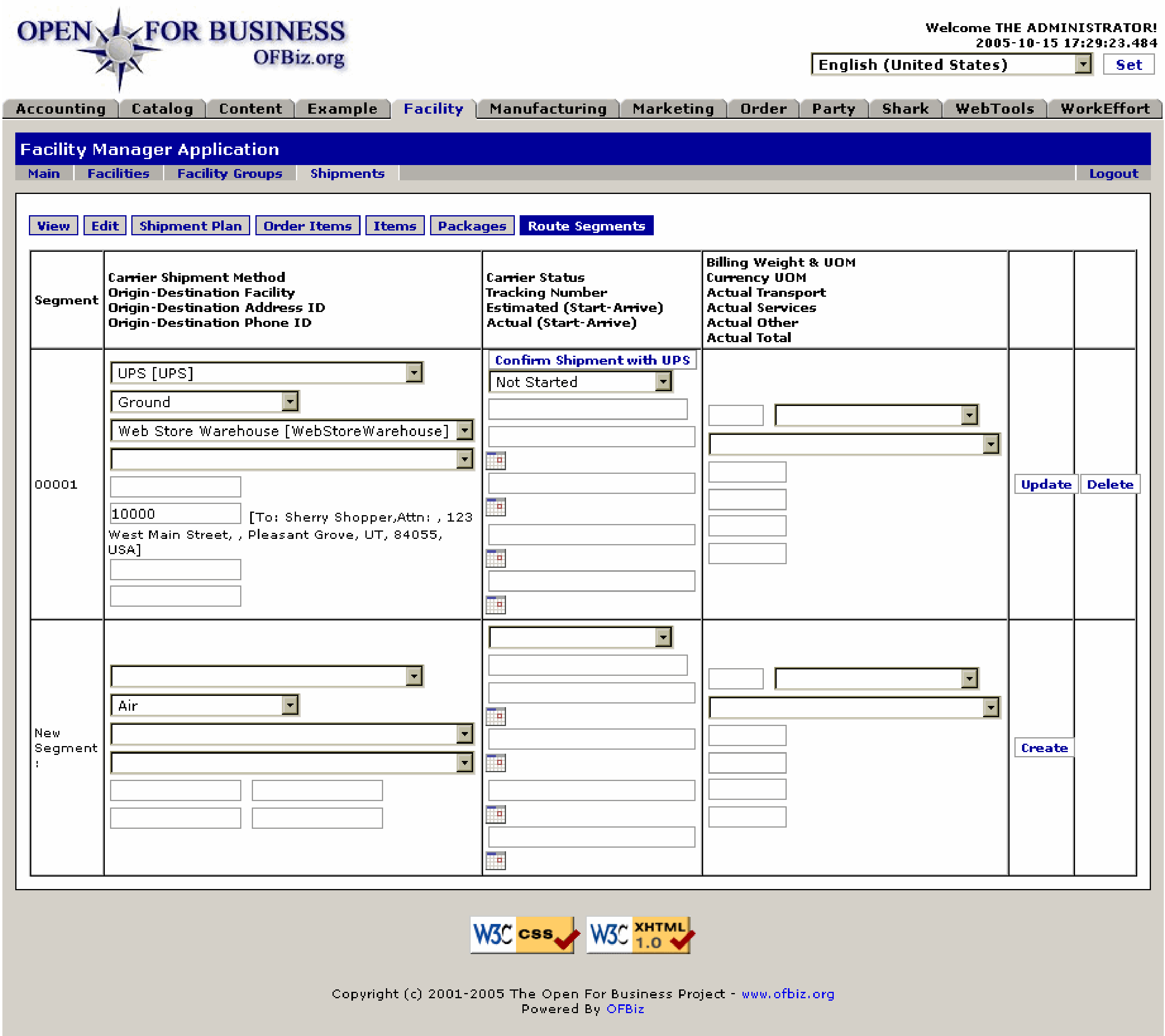
### .4.4.6.5 Other details

This illustration shows one possible presentation. You could be asked for weight information, tracking number, other details depending upon the nature of the shipment.

## .4.4.7 Route Segments

Only enter the details which apply to the shipping route and method chosen for this shipment. Details will vary depending upon carrier, method, route, and priority.

## .4.4.7.1 EditShipmentRouteSegments




Enter and update Shipment Route Segment information. The Plan as shown here is not yet completed.

## .4.4.7.2 link buttons

[Confirm ...] [Update] [Delete] [Create] [View] [Edit] [Shipment Plan] [Order Items] [Items] [Packages] [Route Segments]

### .4.4.7.3 Segment #

Each Segment is dealt with independently.

### .4.4.7.4 Shipping details (drop-down boxes)

Complete as far as possible.

### .4.4.7.5 Carrier details (popup calendars)

Use the drop-down boxes and popup calendars.

### .4.4.7.6 Billing details (drop-down boxes)

Use the drop-down boxes. When all is completed, click on the [Update] box.

# Chapter 9: Accounting Manager

## 01 Main

# Definition: What is it?

This is the default tab for the Accounting Manager application. It gives access to various sub tabs related to accounting configuration and setup as well as relating to managing the accounting function for a business.

NOTE: Work is in progress to separate out some details from this main tab into Accounts Receivable (AR)  and Accounts Payable (AP). These are tabs currently exist and you may notice some duplication in the display.

# What is it used for?

It is the main screen to access all accounting related functions.

# What's on the screen?

The screen currently shows links that will display more detailed screens related to Agreements, Billing Accounts, Fixed Assets, Invoices and Payments.

TO DO: Add a screen shot?

### 02 Invoices

# Definition: What is it?

The default screen is 'Find Invoices' which allows the user to specify search criteria to locate an invoice. Invoices are divided into two types:

- Sales Invoice
- Purchase Invoice

Sales invoices are generated when customers buy something from you. You need to provide a detailed list of the items bought and relevant taxes. They are often referred to a 'tax invoices' as they contain information relating to the amount of sales tax (eg VAT / GST) charged on the product or service.

Purchase invoices are generated by your suppliers when you order something from them. You may send them an order in the form of a Purchase Order. They will then send you the products and an invoice for payment. This invoice is the Purchase Invoice and it will contain details of the items bought plus any taxes.

Both of these documents are used as proof to various tax authorities (eg Inland Revenue, Customs etc) that the required tax has been charged or collected.

GENERAL NOTE: The following is an extract from Ian McNulty's documentation work on accounting:

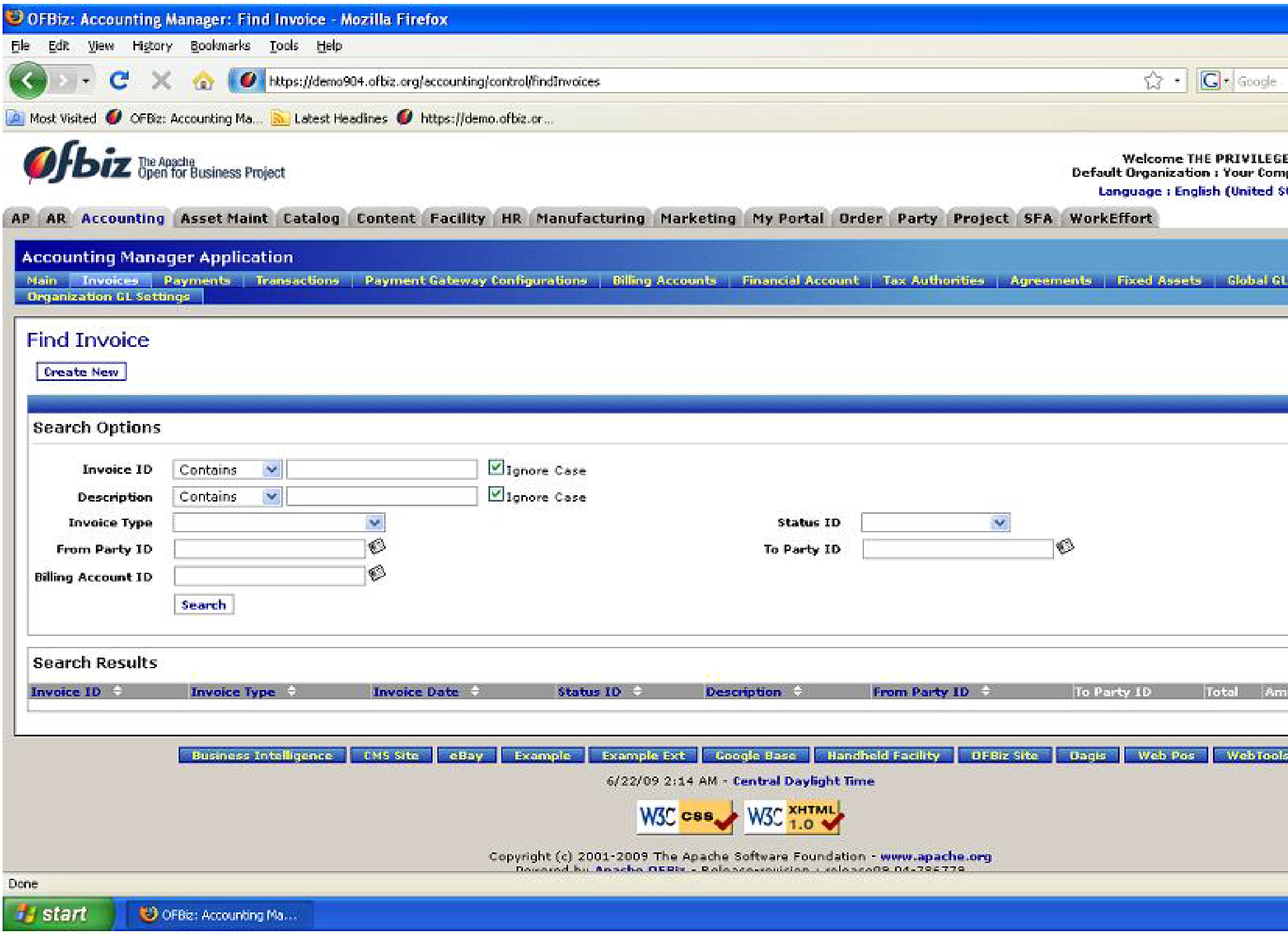
- Invoices are created automatically by the system when certain criteria are met for each item on an order. The criteria will vary depending on the type of product associated with the order item, and the type of order (ie purchase/sales).
- For sales orders: For digital goods an invoice will be created when the order is placed, and that invoice will be for all digital goods in the order. If there are non-digital or physical goods they will go in a separate invoice.
- For those that need physical fulfillment, an invoice will be created for all items in a shipment when the shipment goes into the 'Packed' status. For purchase orders: an invoice will be created from a shipment when the shipment goes into the Received status.

# What is it used for?

It is used to locate existing invoices that have been created automatically by the system or manually by the user. It can also be used to create a new Sales or Purchase invoice.

# What's on the screen?

To do


OFBiz: Accounting Manager: Find Invoice - Mozilla Firefox
File Edit View History Bookmarks Tools Help
https://demo904.ofbiz.org/accounting/control/findInvoices
Most Visited OFBiz: Accounting Ma... Latest Headlines https://demo.ofbiz.or...
The Apache Open for Business Project
AP AR Accounting Asset Maint Catalog Content Facility HR Manufacturing Marketing My Portal Order Party Project SFA WorkEffort
Accounting Manager Application
Main Invoices Payments Transactions Payment Gateway Configurations Billing Accounts Financial Account Tax Authorities Agreements Fixed Assets
Organization GL Settings
Find Invoice
Create New
Search Options
Invoice ID Contains Ignore Case
Description Contains Ignore Case
Invoice Type
Status ID
From Party ID
To Party ID
Billing Account ID
Search
Search Results
Invoice ID Invoice Type Invoice Date Status ID Description From Party ID To Party ID Total
Business Intelligence CMS Site eBay Example Example Ext Google Base Handheld Facility OFBiz Site Oagis Web Pos
6/22/09 2:14 AM - Central Daylight Time
Copyright (c) 2001-2009 The Apache Software Foundation - www.apache.org
Done
start OFBiz: Accounting Ma...

## How do I view all invoices?

Example: To view all invoices

1. Press the 'Search' button to view all invoices

## How do I locate an existing invoice?

Example: To locate an existing invoice

1. Enter the 'Invoice ID' if known
2. Enter a word from the invoice description in the 'Description' field if known
3. Enter the 'Invoice Type' if known
4. Enter the 'From Party Id' if known (NOTE: In most cases for a Sales Invoices this will be Company. For Purchase Invoice it will be the supplier party id)
5. Enter the 'Billing Account Id' if known
6. Enter the invoice status in the 'Status Id' field if known
7. Enter the 'To Party Id' if known (NOTE: In most cases for a Purchase Invoice this will be company. For Sales Invoices it will be the customer party id)
8. Press the 'Search' button to view all invoices
9. All invoices that meet the search criteria will be displayed.

## How do I create a new Sales invoice?

Example: To create a new Sales Invoice

1. Press the 'Create New' button
2. The New Sales Invoice / New Purchase Invoice screen is displayed
3. Using the top part of the screen, leave Invoice type with its default of 'Sales Invoice'
4. Leave 'Organization Party Id' with its default of 'Company'
5. Enter or use the lookup to find the 'To Party Id' (eg DemoCustomer)

6. Press the 'Create' button in the top part of the screen
7. The invoice header has been created and the default header screen will be displayed
8. Details on the invoice will need to be entered via the other sub menus (eg Items, Time Entries etc)

NOTE: The invoice prefix and numbering sequence is controlled via the configuration settings in Organization GL Settings.

## How do I create a new Purchase invoice?

Example: To create a new Purchase Invoice

1. Press the 'Create New' button
2. The New Sales Invoice / New Purchase Invoice screen is displayed
3. Using the bottom part of the screen, leave Invoice type with its default of 'Purchase Invoice'
4. Leave 'Organization Party Id' with its default of 'Company'
5. Enter or use the lookup to find the 'From Party Id'  (eg DemoSupplier)
6. Press the 'Create' button in the bottom part of the screen
7. The invoice header has been created and the default header screen will be displayed
8. Details on the invoice will need to be entered via the other sub menus (eg Items, Time Entries etc)

NOTE TO CHECK: Find out where Purchase Order sequence is controlled..... possibly ENUM entity but need to confirm.

## How do I update an invoice?

Example : To update an existing invoice

1. Locate the invoice using the 'Find Invoices' screen
2. Using the relevant sub menu make the required changes. The sub menus are as follows:

- Overview
- Header
- Items
- Time Entries

- Roles
- Applications
- Send Per Email

## How do I delete an invoice?

Invoices cannot be deleted through the user interface. They can only be cancelled (eg if they have been entered or created by mistake).

NOTE: They can probably be deleted using Entity Data Maintenance in the Webtools menu but this is not recommended for 2 reasons:

1. it may cause data integrity problems.
2. In case of audit it would be a problem.

Children Hide Children | View in hierarchy

02.1 Overview (OFBiz End-User Documentation)

02.2 Header (OFBiz End-User Documentation)

02.3 Items (OFBiz End-User Documentation)

02.4 Time Entries (OFBiz End-User Documentation)

02.5 Roles (OFBiz End-User Documentation)

02.6 Applications (OFBiz End-User Documentation)

02.7 Send per Email (OFBiz End-User Documentation)

### 02.1 Overview

## Definition: What is it?

The Invoice Overview screen is used to display the summary view of the invoice. The screen itself is divided into sections that show various information related to the Invoice (eg Roles, Status, Terms, Items, Payments Applied , Transactions etc).

Invoices can be of two types - Sales Invoices or Purchase Invoices.

The following options are currently available from this screen:

- Create New (Create a new invoice)
- Copy (Create a copy of the current invoice)
- PDF (View a PDF of the current invoice)
- PDF default currency (NOTE TO CHECK: Need to see how this is different from just the PDF view......)
- Status to 'Approved' (Change the status of the current invoice to 'Approved)
- Status to 'Sent' (Change the status of the current invoice to 'Sent')
- Status to 'Ready' (Change the status of the current invoice to 'Ready'. NOTE: This will create the relevant accounting transactions and post them to the general ledger)
- Status to 'Cancelled' (Change the status of the current invoice to 'Cancelled')
- Save as Template (NOTE TO CHECK: Save the current invoice format as a template)

NOTE TO CHECK: Check if there are any other (or different) statuses for a Purchase Invoice....

## What is it used for?

It is used to give the user an full overview of the details of the invoice in one single view. For (all?) Invoices the following details are shown:

- Customer Details
- Invoice Status (In Process, Paid, Sent, Approved etc)
- Order Date
- Invoice Amount
- Payments Applied to the Invoice and the date Paid
- Invoice item details (including any work effort or time entries)
- List of general ledger accounting transactions generated

The screen also contains links to the following sub menus:

- Header
- Items
- Time Entries

- Roles
- Applications
- Send Per Email

## What's on the screen?

To do

### 02.2 Header

## Definition: What is it?

The Header screen displays the header details for the invoice and allows the majority of fields to be updated if required. The only fields that cannot be changed are the following:

- Invoice type (Sales Invoice or Purchase Invoice)
- Party Id (eg Company)
- Invoice Status (eg In Progress)

The following options are currently available from this screen:

- Create New (Create a new invoice)
- Copy (Create a copy of the current invoice)
- PDF (View a PDF of the current invoice)
- PDF default currency (NOTE TO CHECK: Need to see how this is different from just the PDF view......)
- Status to 'Approved' (Change the status of the current invoice to 'Approved)
- Status to 'Sent' (Change the status of the current invoice to 'Sent')
- Status to 'Ready' (Change the status of the current invoice to 'Ready'. NOTE: This will create the relevant accounting transactions and post them to the general ledger)
- Status to 'Cancelled' (Change the status of the current invoice to 'Cancelled')
- Save as Template (NOTE TO CHECK: Save the current invoice format as a template)

NOTE TO CHECK: Check if there are any other (or different) statuses for a Purchase Invoice....

## What is it used for?

It is used to view and update details on the invoice header. The details that can be amended are as follows:

- Invoice Date
- Invoice Description
- Invoice Roles
- Invoice Currency
- Invoice Due Date
- Invoice Message
- Invoice Party (i.e. the party that the invoice is being sent to)
- Billing Account Id (i.e. if the invoice is to be added to a Billing Account)
- Recurrence Info Id (......???????)

NOTE: There is an additional field available here called 'Recurrence Info Id'.....need to investigate how this is used ....possibly for setting up recurring transactions / invoices .....????

## What's on the screen?

To do

## How do I update the header details for an Invoice?

Example: To update the header details for an invoice

1. Select the 'Header' sub menu and the header details of the invoice will be displayed
2. Update the fields required
3. Press the 'Update' button

### 02.3 Items

## Definition: What is it?

The Items screen displays the individual invoice line details and allows the user to update or remove an entry. As each invoice line is created it is allocated a specific sequence (or Item Number) which acts as a unique line identifier.

NOTE: The Invoice Item Type is controlled via the Global GL Settings (TO ADD PATH) and also uses the ENUM entity. Need to investigate as although the line descriptions are the same between the Sales and Purchase Invoices they actually used different ENUM types......This can cause problems setting up Agreements based on Invoice Item Types (as it's not clear using the description only whether it refers to a purchase invoice line item or a sales invoice item.....)

## What is it used for?

It is used to view, update or remove individual invoice lines from an Invoice.

## What's on the screen?

To do

## How do I create a new invoice line item?

Note that only invoices that have the status (.........) can have new line items created. This means that if an invoice has already been paid and processed OFBiz will not allow any amendments to it.

Example: To create a new invoice line item

1. Select the 'Items' sub menu for the invoice
2. The 'Add a new invoice item' screen will be displayed
3. Leave the 'Item No' field blank (as it will be automatically generated)
4. Select the 'Invoice Item Type' from the drop down box (NOTE: A typical line using the demo could be 'Invoice Finished Good Item' but ensure that it corresponds with the type of products setup in your catalog)
5. Enter a description describing what the line item is (NOTE: If you are going to enter a product in the Product Id field from the catalog then leave the 'Description' field blank as it will be used to show the product description)
6. Leave the 'Override GL Account Id' field blank as it will use the default account based on the Chart of Accounts setup

7. Use the lookup or enter a product code in the 'Product Id' field (NOTE: This can be left blank if your invoice line is not related to a product in the catalog)
8. Enter a number in the 'Quantity' field
9. Enter a 'Unit Price' only if the Product Id field is blank (NOTE: If a Product Id has been entered then leave the 'Unit Price' field blank as it will pick up the product price from the catalog)
10. Leave the 'Inventory Item' field blank
11. Leave the 'Product Feature Id' field blank
12. Leave the 'UOM' field blank
13. Select 'Yes' for the 'Taxable Flag' field

NOTE TO CHECK: Need to do some tests to see what line item type needs to be used for 'Sales Tax'. I think that it could be 'Invoice Item Sales Tax' since tax is currently calculated at invoice item line level. Also the automatically generated invoices from Order Entry and E-Commerce show taxes at the invoice item line level (think there may be some work going on - see JIRA on to consolidate entries). Need to do some tests using 'Invoice Sales Tax' to see how it works.........

## How do I update an invoice line item?

Not all the fields on the invoice item line can be updated. For example Taxable Flag and Inventory Item cannot be updated. If these fields need to be amended then the invoice item will need to be removed and then re-created.

Example: To update an invoice line item

1. Select the 'Items' sub menu for the invoice
2. Any existing line items will be displayed in the 'Items' box
3. Amend the details in the line item that needs to be updated (eg Quantity, Invoice Item Type, Product Id, Description, Override GL Account, Unit Price)
4. Press the 'Update' button displayed at the end of the line item that has been updated

## How do I delete an invoice item?

Example: To delete an invoice line item

1. Select the 'Items' sub menu for the invoice

2. Any existing line items will be displayed in the 'Items' box
3. Press the 'Remove' button displayed at the end of the line item that needs to be deleted

### 02.4 Time Entries

## Definition: What is it?

The Time Entries screen displays any time logged against the invoice. For example these time entries can be from employee or external supplier timesheets that are tracked within OFBiz.

## What is it used for?

It is used to track any individual work or billable hours against an invoice.

## What's on the screen?

To do

## How do I add a new time entry for an invoice?

Two options: Add time entry to a new invoice and add time entry to an existing invoice.

NOTE TO CHECK: Can it be done via Project Manager......???

Timesheet entries can be added to an existing invoice from Workeffort Manager.

NOTE TO DO: Need to write this up more clearly. Locate the task then using the sub menu 'Time Entries'. In the screen area labelled 'Add Work Effort Time to Invoice' you need to enter the invoice id. Need to check if there is anywhere else work time can be added to an invoice

## How do I update a time entry for an invoice?

To do

NOTE: To check if this can only be done via timesheets.

## How do I remove a time entry from an invoice?

To do

NOTE: To check if this is done via timesheets

### 02.5 Roles

## Definition: What is it?

This sub menu allows parties with specific roles to be associated with an invoice.

## What is it used for?

If the E-Commerce order entry or Sales Order entry route has already been used then the invoice generated will already contain the relevant roles from the various parties.
For a Sales Invoice examples of roles include:

- Bill From Customer (this would be linked to Company)
- Bill To Customer
- End User Customer
- Ship To Customer

## What's on the screen?

To do

## How do I add a party role to an invoice?

Party roles will automatically be added to an invoices that have been generated as a result of E-Commerce order entry or Sales Order entry. They can also be added be added manually.

Example: To add a party role to an invoice

1. Select the 'Roles' sub menu

2. Enter or use the lookup to enter the party to be added to the invoice in the 'Party Id' field
3. Use the drop down box to select the 'Role Type Id'
4. Leave the 'Date Time Performed' field blank (NOTE: This field is optional and can be entered if required. This field can be used to indicate the date and time this role was performed by the party for this invoice)
5. Leave the 'Percentage' field blank (NOTE: This field is optional and can be entered if required. If roles are shared then this field can be used to indicate the assigned percentage for this role)
6. Press the 'Submit' button
7. The new role entry will be displayed on the bottom part of the screen

NOTE: If you select a role that is not associated with the party that has been entered an error message will be displayed. To fix it you will need to add the role to the party or choose another party that already has that role associated with it.

## How do I update a party role on an invoice?

A party role cannot be updated via the current user interface. It can only be removed. If a party role needs to be updated then the entry must be deleted and then re-created.

## How do I remove a party role from an invoice?

Example: To remove a party role from an invoice

1. Locate the entry that needs to be removed
2. Press the 'Remove' button next to the entry that needs to be deleted
3. The entry is now removed from the list of invoice roles

### 02.6 Applications

## Definition: What is it?

The Invoice Applications sub menu is where payments that have been made (or received) can be linked or allocated to an invoice. The phrase 'applying' an amount to an invoice is often used to describe this. The screen is divided into 3 main areas as follows:

- Payments Applied (which shows details of the total amount 'Applied' and the total amount 'Open'. Note that 'Open' here means outstanding)
- Possible Payments to Apply (which shows all the payments that have been sent from the same party id as the invoice - for a sales invoice this would be the customer party id)
- Assign Payment to Invoice (which allows you to manually assign a specific payment id to this invoice)

GENERAL NOTE: General Ledger accounting transactions are generated during the payment application process but unless your GL is setup with Unapplied Cash and Applied Cash accounts - I'm not sure that there will be any true accounting impact. In the Sales Order process the accounting transaction generated the following GL Accounting transaction is generated for 'Payment Applied'

| | | | |
|---|---|---|---|
| Payment Applied | Pack Shipment<br>Quick Ship Entire Order | DR 120000 Accounts Receivable<br>CR 120000 Accounts Receivable | This transaction doesnt really do anything! |

## What is it used for?

This is used to link payments to invoices. It is also used to allocate which part of a payment is allocated or applied to a specific invoice. This is extremely useful if your customers pay multiple invoices with a single payment.

Example:

- A customer could send a single payment of $1000 that can be used to pay for two invoices (eg $400 and $600)
- Using this applications sub menu allows you to allocate part of the $400 to one invoice and the balance ($600) to the other invoice

By default all 'unapplied' payments that have been entered into OFBiz from the customer will be available for selection even if they have not yet been flagged as formally 'Received'. This means that these are payments that have not already been linked to another invoice. If only part of a payment amount has been linked to an invoice then the remaining amount is left available to be allocated to another invoice. Also note that a single invoice could be paid by multiple payments being applied to it.

## What's on the screen?

To do

## How do I apply a payment (or payments) to an invoice?

Example: To apply a payment to an invoice

1. Select the 'Applications' sub menu for the invoice
2. A list of unapplied payments for the party id will be displayed
3. Press the 'Apply' button next to the entry that needs to be applied to the invoice (NOTE: More than one entry may be used. Also only part of a larger amount may be used)
4. The Payments Applied total at the top of the screen will be updated with the amount selected. Also the Amount Open will be reduced by the amount selected.
5. Once the total invoice amount has been selected a message will be displayed and only the first part of the screen will be displayed
6. The top part of the screen will now be updated to show the 'Payments Applied' total is equal to the invoice total and the 'Amount Open' is zero.

## How do I update an applied payment for an invoice?

Payments that have been applied to an invoice can be updated. This means that you can change the details of the payment transaction or adjust the amount that was applied to the invoice.

Example: To update a payment applied to an invoice

1. Select the 'Applications' sub menu for the invoice
2. A list of payments already applied to the invoice will be displayed in the top part of the screen
3. Enter or use the lookup to change the 'Payment Id' if required
4. Enter the updated amount in the 'Amount to Apply' field if required
5. Press the 'Update' button

# How do I remove an applied payment (or payments) from an invoice?

NOTE TO CHECK: It can be done before transaction has been posted to GL but also need to check if its can be done if the transaction has been posted.

Example: To remove an applied payment from an invoice

1. Select the 'Applications' sub menu for the invoice
2. A list of payments already applied to the invoice will be displayed in the top part of the screen
3. Press the 'Remove' button next to the payment entry that needs to be removed
4. The entry will be removed and the top part of the screen will be update the 'Payments Applied' total and 'Amount Open'

### 02.7 Send per Email

# Definition: What is it?

This is used to send a copy of the invoice details to one or more email addresses. The invoice is included as an attachment and the user can add a simple accompanying email message.

# What is it used for?

See above

# What's on the screen?

To do

# How do I send a copy of an invoice via email?

Example: To send a copy of an invoice via email

1. Select the 'Send per Email' sub menu
2. The 'Send per Email' default screen will be displayed
3. Enter the 'From Email Address' (NOTE TO CHECK: Shouldnt this be defaulted from the user login.....????)

4. Leave the 'To Email Address' as it is as this will be defaulted using the customer details from the invoice
5. If required enter the 'Copy Email address' for anyone that needs to be copied on the email
6. Leave the 'Subject' as the default of 'Please find attached invoice'
7. Leave the 'Other Currency' box blank (NOTE TO CHECK: Investigate what effect this has on the email.....)
8. Enter a short email message in the 'Email Body'
9. Press the 'Submit' button

**03 Payments**

# Definition: What is it?

See details for Find Payment.

# What is it used for?

See details for Find Payment.

# What's on the screen?

See details for Find Payment.

Children Hide Children | View in hierarchy

03.1 Find (OFBiz End-User Documentation)

03.2 Overview (OFBiz End-User Documentation)

03.3 Header (OFBiz End-User Documentation)

03.4 Applications (OFBiz End-User Documentation)

## 03.1 Find

### Definition: What is it?

The default screen is 'Find Payment' which allows the user to search for and view the details related to a payment transaction. Specific search criteria can be entered as a filter to locate the payment quickly.
Payments can be incoming or outgoing and the demo data contains a list of payment type descriptions that describe the reason for the payment in more detail (eg Customer Deposit, Tax Payment, Commission Payment etc).

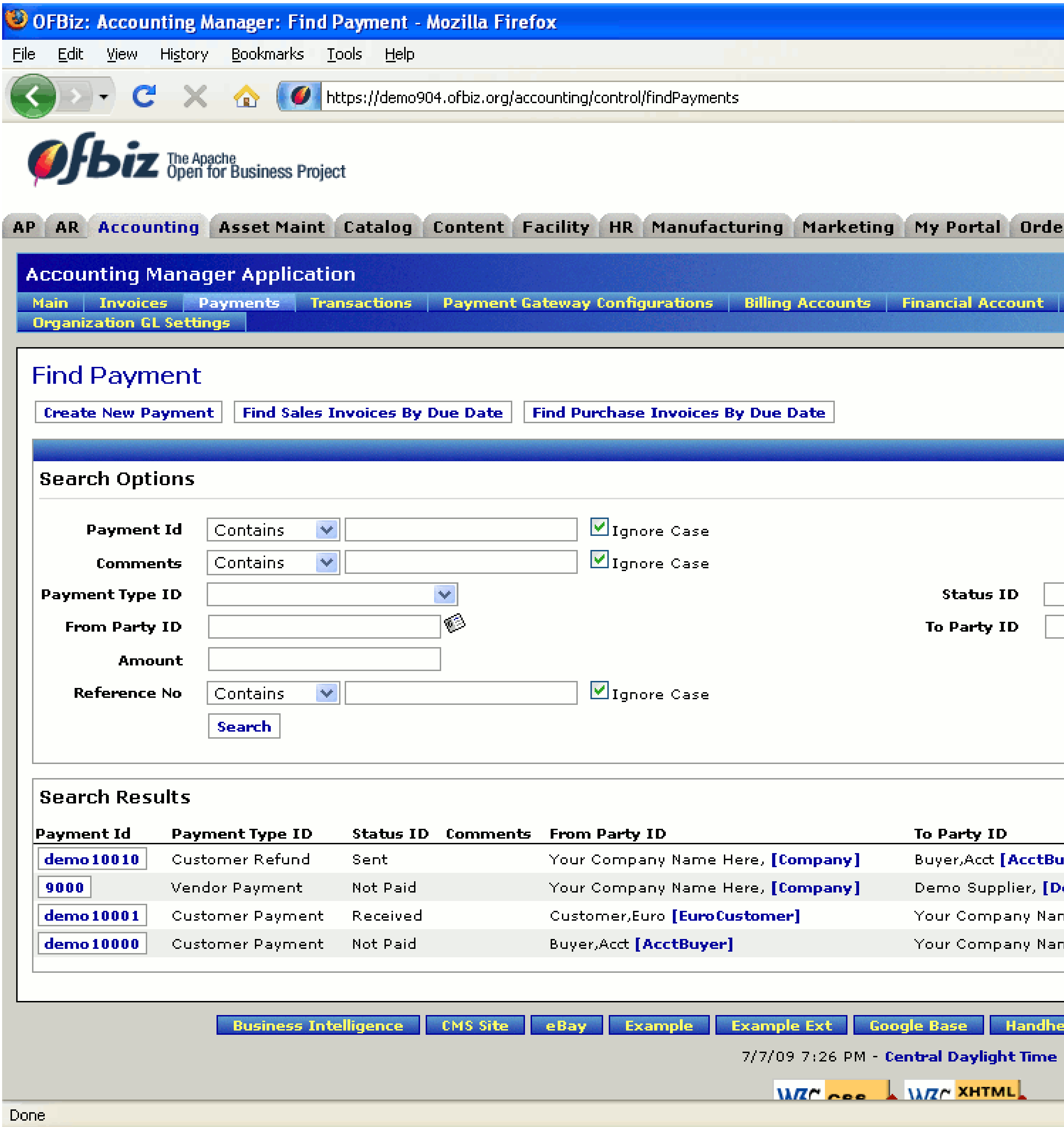
### What is it used for?

It is used to locate existing payments that have been created automatically by the system or manually by the user. There are links from this page that can be used to do the following:

- Create a new incoming or outgoing payment
- Find Sales Invoices by due date (NOTE TO CHECK: that have not been totally paid and need to be matched to an incoming payment.......?????)
- Find Purchase Invoices by due date (NOTE TO CHECK: that have to be paid by a specific date.......????)

## What's on the screen?

To do



## How do I view all payments?

```
Example: To view all invoices
```

1. Press the 'Search' button to view all payments.

## How do I locate an existing payment?

```
Example: To locate an existing payment.
```

1. Enter the 'Payment ID' if known
2. Enter a word from the payment comments in the 'Comments' field if known (NOTE TO CHECK: Should this be payment description....??)
3. Enter the 'Payment Type Id' if known
4. Enter the 'From Party Id' if known (NOTE: In most cases for an incoming payment this will be the customer party id)
5. Enter the payment amount in the 'Amount' field if known
6. Enter some details from the payment reference number in the the 'Reference No' field if known
7. Enter the status of the payment in the 'Status Id' field if known
8. Enter the 'To Party Id' if known (NOTE: In most cases for an incoming payment this will the the customer party id. For outgoing payments this will be the supplier id, or customer id for a refund)
9. Press the 'Search' button to view all payments
10. All payments that meet the search criteria will be displayed.

Children Hide Children | View in hierarchy

03.1.1 Create New Payment (OFBiz End-User Documentation)

03.1.2 Find Sales Invoice by Due Date (OFBiz End-User Documentation)

03.1.3 Find Purchase Invoice by Due Date (OFBiz End-User Documentation)

### 03.1.1 Create New Payment

#### Definition: What is it?

This screen is used to create a new payment. Payments can be incoming (eg from a customer) or outgoing (eg to a supplier).

#### What is it used for?

This screen is used to create a new payment. Payments can be incoming (eg from a customer) or outgoing (eg to a supplier). Payment types are used to describe what the payments are for in the system and are listed below.
As part of the demo data if the payment is an incoming payment then the payment type is currently limited to the following:

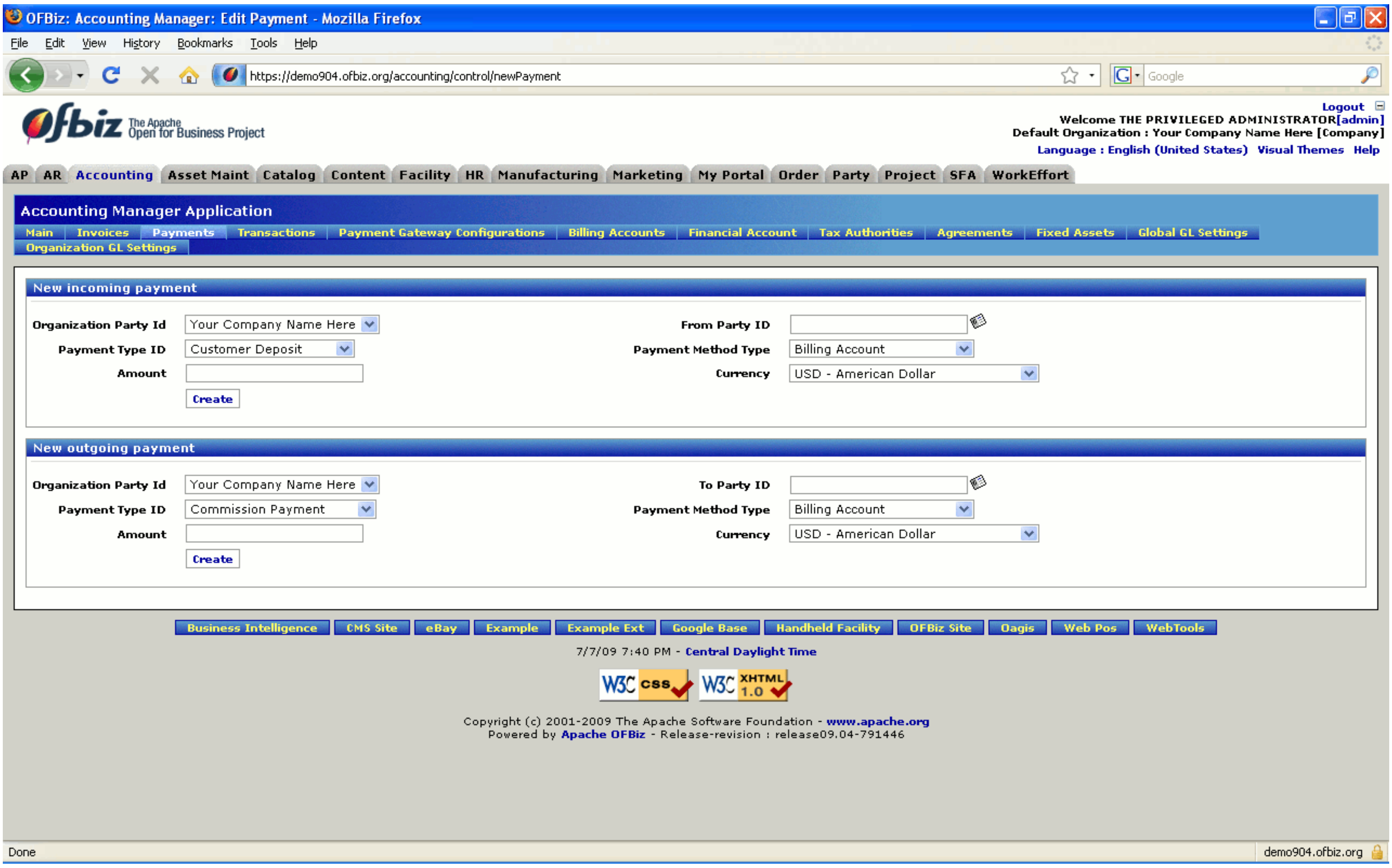
- Customer Deposit
- Customer Payment
- Interest In
- POS Paid In (NOTE: POS = Point of Sale)
- Gift Certificate Deposit

If the payment is an outgoing payment then the payment type is currently limited to the following:

- Commission Payment
- Customer Refund
- Gift Certificate Withdrawal
- POS Paid Out
- Income Tax Payment
- Pay Check
- Payroll Payment
- Payroll Tax Payment
- Sales Tax Payment
- Tax Payment
- Vendor Payment
- Vendor Prepayment (NOTE: I think this means that this is a payment in advance to your supplier before delivery of any goods)

## What's on the screen?

To do




## How do I create a new incoming payment?

Example: To create a new incoming payment

1. Press the 'Create New Payment' button
2. The New Incoming Payment / New Outgoing Payment screen is displayed
3. Leave 'Organization Party Id' with its default of 'Company'
4. Select the 'Payment Type Id' from the drop down box (NOTE: This is currently limited to the following: Customer Deposit, Customer Payment, Interest In, POS Paid In and Gift Certificate Deposit)
5. Enter the payment amount in the 'Amount' field
6. Enter or use the lookup to find the 'From Party Id'
7. Select the 'Payment Method Type' from the drop down box (eg how the payment was paid - cash, cheque, money order etc)
8. Leave the 'Currency' field with its default of 'USD' (NOTE: This default comes from Company)
9. Press the 'Create' button

10. The payment header is created and the default header screen will be displayed

NOTE: Need to understand what happens if customer pays in a currency that is not the company default.... if the exchange rate is specified then I think it should convert the currency to the default currency for accounting purposes.... need to investigate and test.

### How do I create a new outgoing payment?

Example: To create a new outgoing payment

1. Press the 'Create New Payment' button
2. The New Incoming Payment / New Outgoing Payment screen is displayed
3. Leave 'Organization Party Id' with its default of 'Company'
4. Select the 'Payment Type Id' from the drop down box (NOTE: This is currently limited to 11 entries including Commission Payment, Customer Refund, Vendor Payment, Income Tax Payment)
5. Enter the payment amount in the 'Amount' field
6. Enter or use the lookup to find the 'To Party Id'
7. Select the 'Payment Method Type' from the drop down box (eg how the payment is to be paid - cash, cheque, money order etc)
8. Leave the 'Currency' field with its default of 'USD' (NOTE: This default comes from Company)
9. Press the 'Create' button
10. The payment header is created and the default header screen will be displayed

NOTE: Need to investigate what happens if you specify payment in another currency that is not the company default......

## 03.1.2 Find Sales Invoice by Due Date

### Definition: What is it?

This screen allows the user to search for and locate Sales Invoices based on their due date. The 'Due Date' can be defined as the last possible date that payments can be received for the invoice without triggering late payment penalties. The 'Invoice Date' can be defined as the date that the invoice was created and this is normally based on when products were shipped or services were provided.
NOTE TO CHECK: There appears to be a minor bug here as if the Invoice 'Due Date' is different to the Invoice Date (eg. Invoice Creation Date) then the Invoice Date is used as the Due Date in this screen which I dont think is correct..... Need to do more testing on this.....
A Sales Invoice may be due to be paid immediately or as in some cases the customer is given a 'grace period' after which the invoice is generated and becomes due. Examples of this include only generating a customer invoice after a certain amount of time after the dispatch of their

order. (NOTE: There are several ways this can be achieved in OFBiz including the use of agreements and billing accounts).

## What is it used for?

It can be used to locate Sales Invoices as follows:

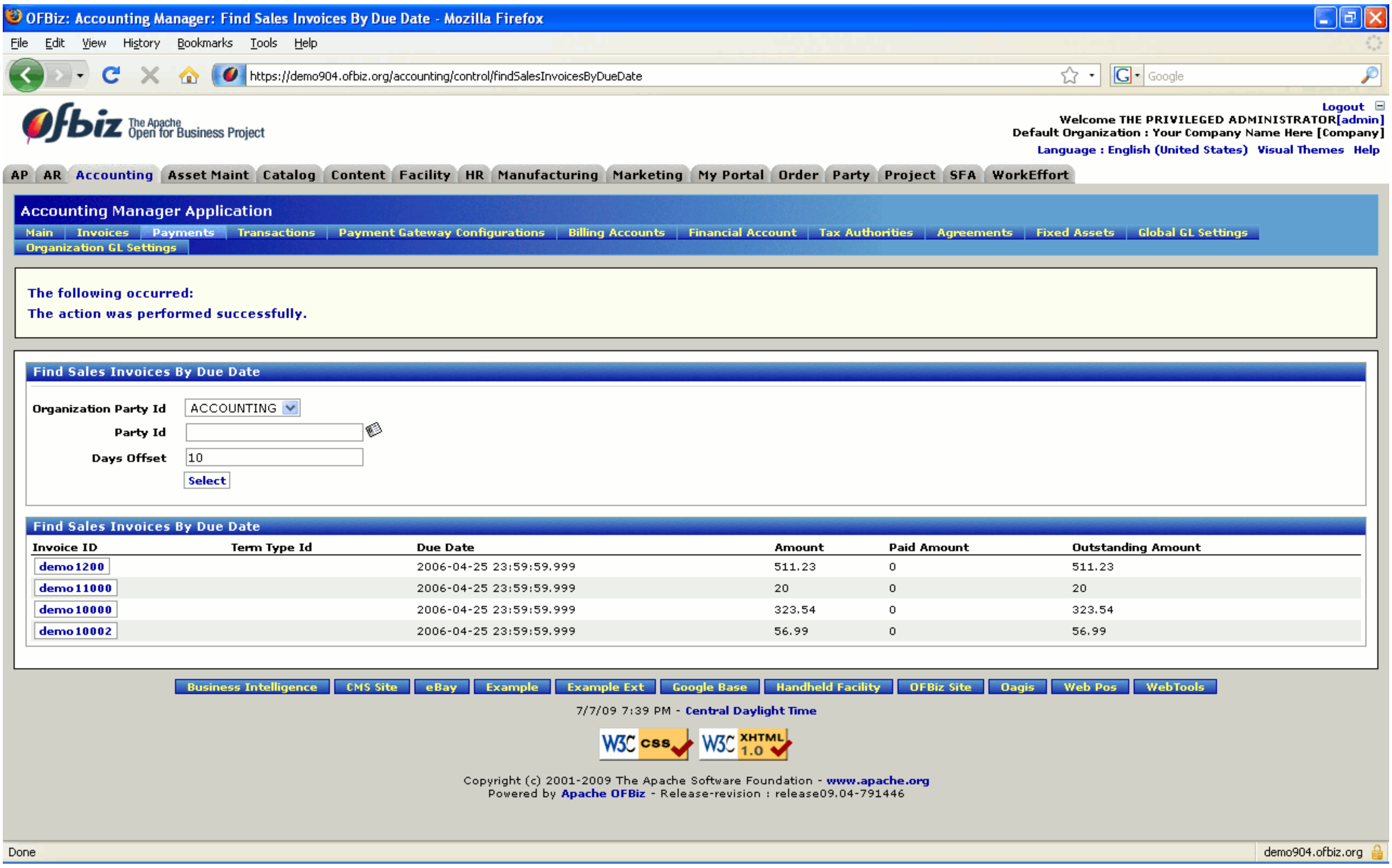
- That will become due within a fixed timeframe (eg the next 5 days)
- That may already be overdue
- That have been automatically generated by the system (eg as a result of Agreements based on payment in 30 days etc....TO CHECK)

NOTE: See details from Jacopo below regarding future work regarding Find Sales Invoice by Due Date and Find Purchase Invoice by Due Date functionality:

- The two links are used to search invoices' due dates for payments: there are plans to add links to quickly create payments for them etc... So they are somewhat in the middle between an invoice thing and a payment thing. By the way, for now I will close this issue because the best spot to place them is in the AR and AP applications, but there is still a lot of work to do to make them usable.

## What's on the screen?

To
do




## How do I find a Sales Invoice by Due Date?

Example: To find Sales Invoices by Due Date

1. Press the 'Find Sales Invoices by Due Date' button
2. The Find Sales Invoices by Due Date screen is displayed
3. Enter the 'Organization Party Id' (eg. Normally this will be Company)
4. Enter the 'Party Id' that the Sales Invoice (eg. Normally this will be the Customer Party Id)
5. Enter a number in the 'Days Offset' field that represents the number of in which the invoice will become due (eg If an invoice is due to be paid in 5 days then enter 5 or greater)
6. Press the 'Select' button

### 03.1.3 Find Purchase Invoice by Due Date

#### Definition: What is it?

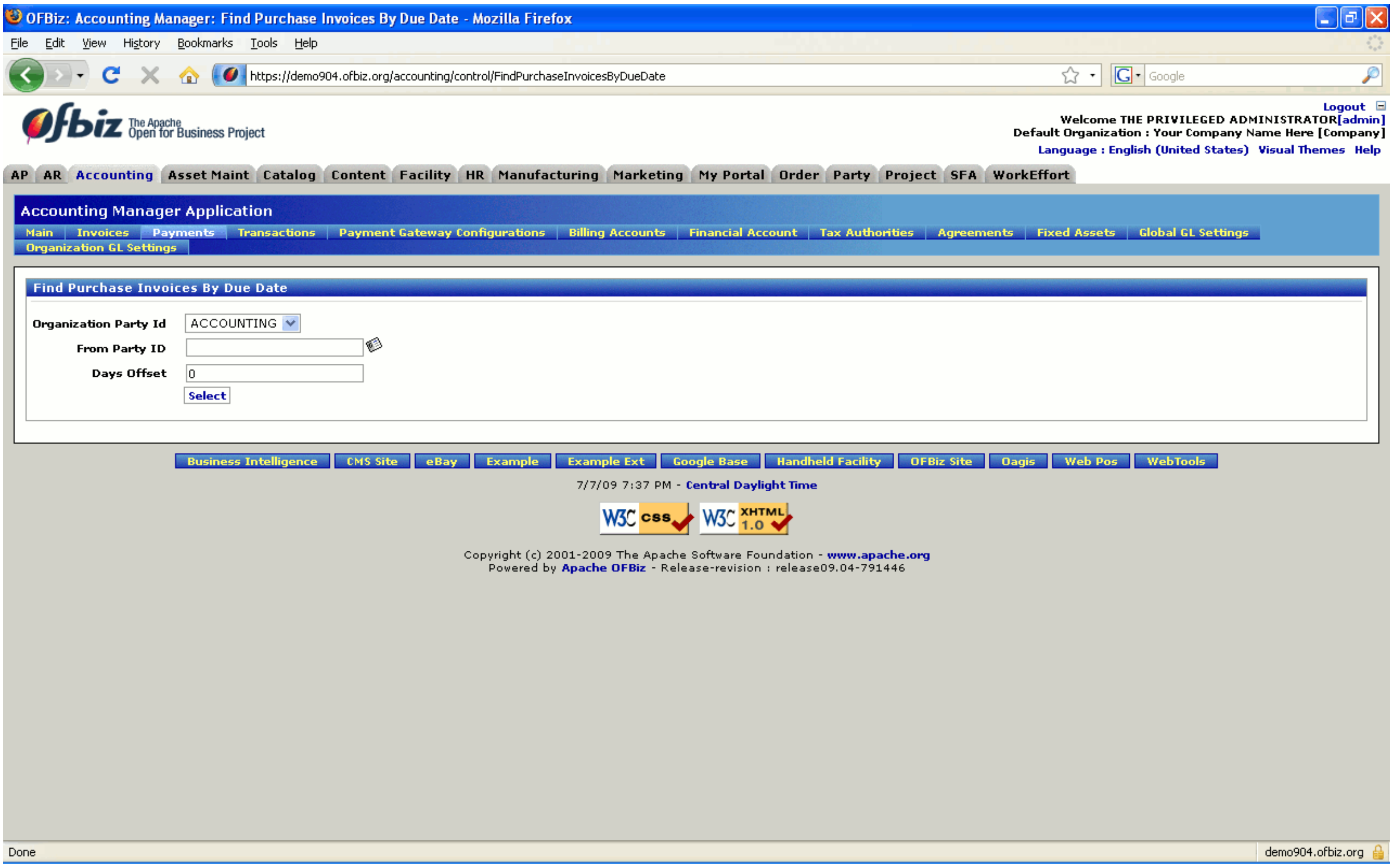
This screen allows the user to search for and locate Purchase Invoices based on their due date. The 'Due Date' can be defined as the last possible date that payments can be received for the invoice without triggering any late payment penalties. The 'Invoice Date' can be defined as the date that the invoice was created and this is normally based on when products were received or services were provided.
NOTE TO CHECK: See if the same bug that exists with Sales Invoices is here too.
A Purchase Invoice may be due to be paid immediately or you may be given a 'grace period' after which the invoice is.

#### What is it used for?

To do

## What's on the screen?

To do




## How do I find Purchase Invoices by Due Date?

Example: To find Purchase Invoices by Due Date

1. Press the 'Find Purchase Invoices by Due Date' button
2. The Find Purchase Invoices by Due Date screen is displayed
3. Enter the 'Organization Party Id' (eg. Normally this will be Company)
4. Enter the 'Party Id' that the Purchase Invoice (eg. Normally this will be the Supplier Party Id)
5. Enter a number in the 'Days Offset' field that represents the number of in which the invoice will become due (eg If an invoice is due to be paid in 5 days then enter 5 or greater)
6. Press the 'Select' button

## 03.2 Overview

### Definition: What is it?

The Payments Overview screen displays the summary details of the payment. One one side it shows information related to the payment transaction header (eg Payment Type, Status, Amount, Effective Date etc) and the other it shows if the payment has been applied (or matched) to an invoice or billing account etc.
The following options are currently available from this screen:

- Create New (Create a new payment)
- Status to 'Received' (Change the status of the current payment to 'Received. NOTE: This will create the relevant accounting transactions and post them to the general ledger)
- Status to 'Cancelled' (Change the status of the current payment to 'Cancelled')

- Status to 'Confirmed' (Change the status of the current invoice to 'Confirmed'. NOTE: This status option will not appear until the status has been changed to 'Received')

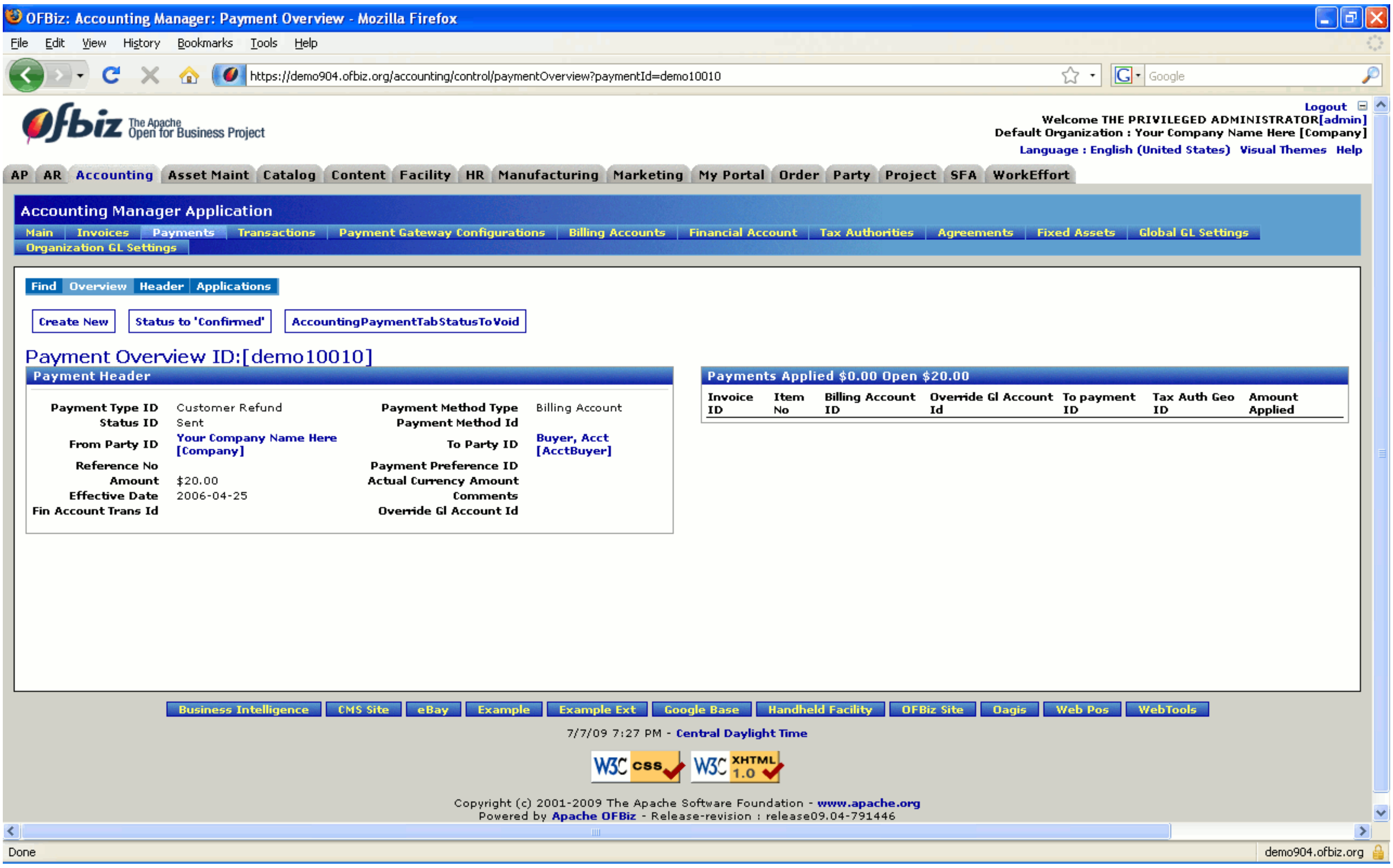
### What is it used for?

It is used to show the details related to a specific payment in a one screen summary format. There are update links from both the 'Payment Header' and 'Payment Applied' areas to allow the user to modify these quickly.
NOTE: The general ledger transactions generated are based on the GL Account Type defaults for Company as follows:

- Debit Entry (GL Account Type defaults)
- Credit Entry (Payment Method Id / GL Account Id)

## What's on the screen?

To do



# 03.3 Header

## Definition: What is it?

The Header screen displays the header details for the payment transaction and allows all fields to be updated if required.
The following options are currently available from this screen:

- Create New (Create a new payment)
- Status to 'Received' (Change the status of the current payment to 'Received. NOTE: This will create the relevant accounting transactions and post them to the general ledger)
- Status to 'Cancelled' (Change the status of the current payment to 'Cancelled')

- Status to 'Confirmed' (Change the status of the current invoice to 'Confirmed'. NOTE: This status option will not appear until the status has been changed to 'Received')

NOTE TO CHECK: What about Payment Method Id ?????

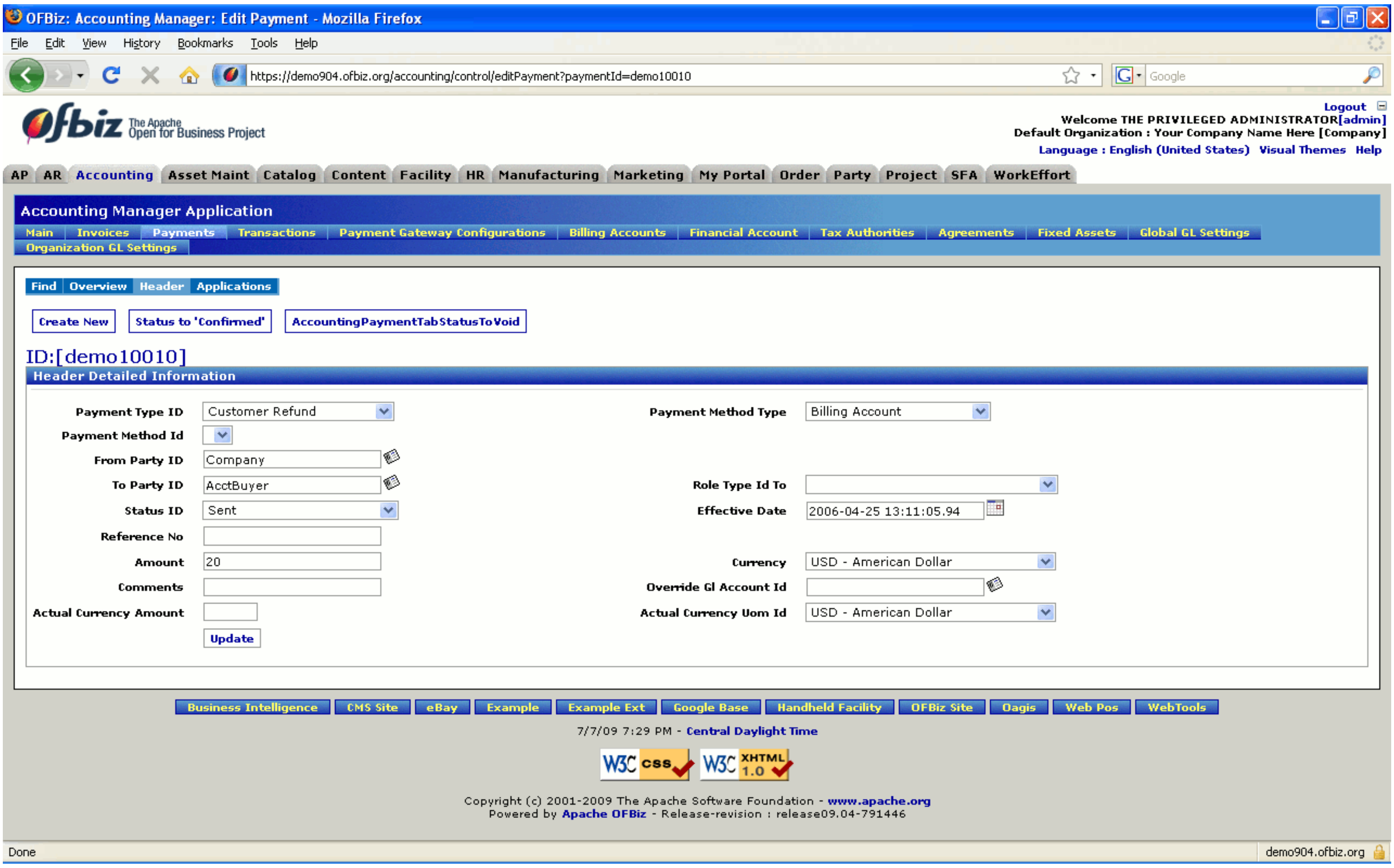
## What is it used for?

It is used to view and update details on the invoice header. Details that can be amended are as follows:

- Payment Type Id (eg the type of payment such as Customer Deposit or Tax Payment)
- Payment Method Id (See NOTE to check above)
- From Party Id (eg who is sending the payment)
- To Party Id (eg who the payment is being sent to)
- Status
- Reference No (eg a reference number for the payment)
- Payment Amount
- Comments (any notes to be stored with the transaction)
- Actual Currency Amount (NOTE: Need to investigate this....may be linked to non default currency transactions...)
- Payment Method Type (eg Cash, Cheque, Billing Account etc)
- Role To Id (NOTE: Need to investigate this and test....)
- Effective Date
- Currency (default is the currency for Company)
- Override GL Account (an override account to post this transaction to)
- Actual Currency UOM (NOTE: Need to investigate this... may be linked to non default currency transactions...)

## What's on the screen?

To do




## How do I update the header details for a Payment?

Example: To update the header details for a payment

1. Select the 'Header' sub menu and the header details of the payment will be displayed
2. Update the fields required
3. Press the 'Update' button

## 03.4 Applications

### Definition: What is it?

The Payments Applications sub menu is where payments that have been made (or received) can be linked or allocated to an invoice, another payment, a billing account or a tax authority.
NOTE: General Ledger accounting transactions are generated during the payment application process but unless your GL is setup with Unapplied Cash and Applied Cash accounts - I'm not sure that there will be any true accounting impact. In the Sales Order process the accounting transaction generated the following GL Accounting transaction is generated for 'Payment Applied'
The following options are currently available from this screen:

- Create New (Create a new payment)
- Status to 'Received' (Change the status of the current payment to 'Received. NOTE: This will create the relevant accounting transactions and post them to the general ledger)
- Status to 'Cancelled' (Change the status of the current payment to 'Cancelled')
- Status to 'Confirmed' (Change the status of the current invoice to 'Confirmed'. NOTE: This status option will not appear until the status has been changed to 'Received')

### What is it used for?

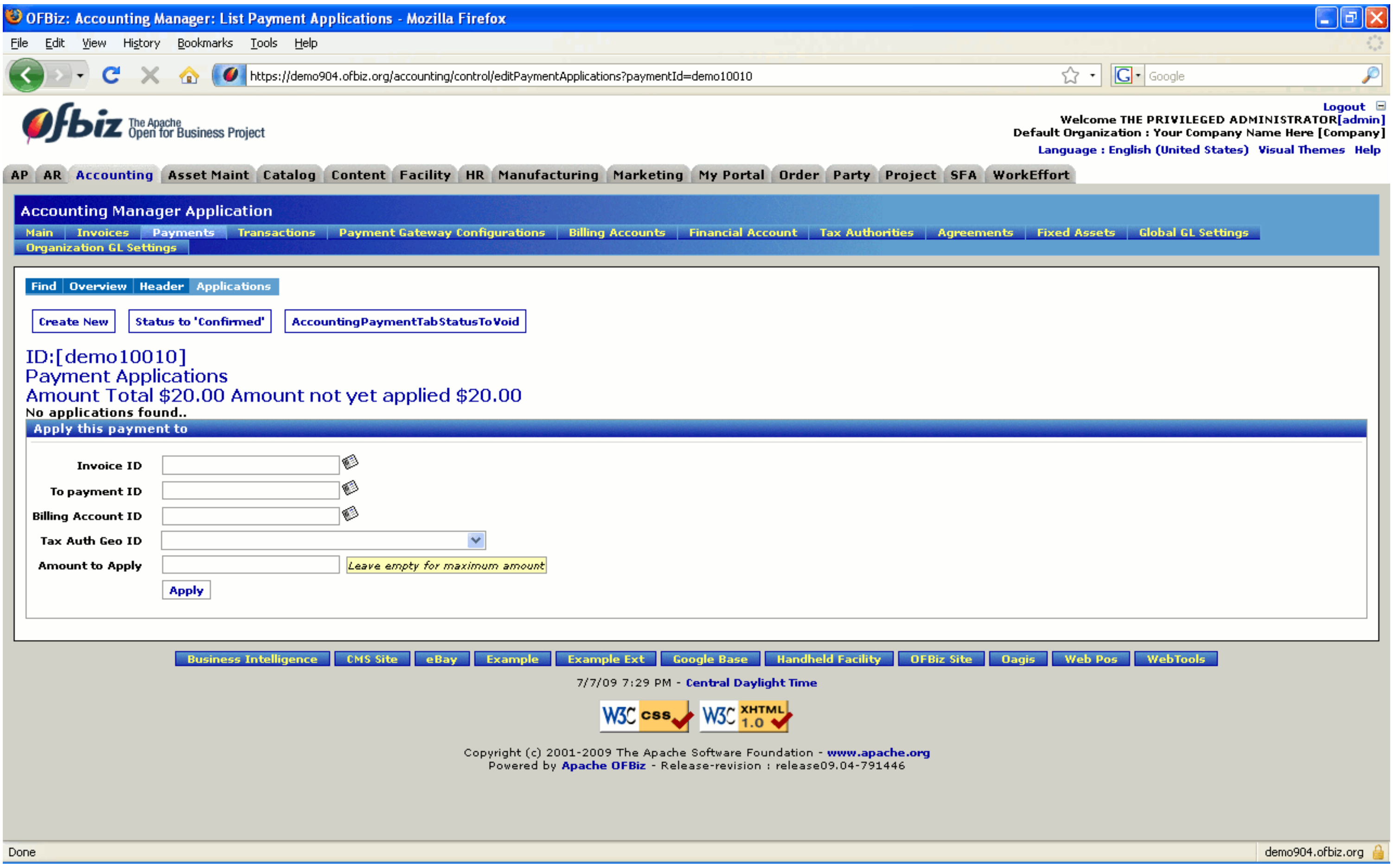
This is used to link payments the following:

- An invoice or invoices
- Another Payment
- A Billing Account
- A Tax Authority

NOTE: Need to include some examples here........

## What's on the screen?

To do



## How do I apply a payment to an invoice?

Example: To apply a payment

1. Select the 'Applications' sub menu for the payment
2. A list of invoices will be displayed in the 'Possible Invoices to Apply' box (NOTE: If no open invoices exist for the party that is sending the payment then this may not list any invoices)
3. Press the 'Apply' button next to the invoice (or invoices) that this payment is for

NOTE: Although it can be overriden the 'Amount to Apply' field will default to the lesser of the invoice total or the payment amount. This can be shown by examples as follows:

- If a payment of $150 is received but the invoice total is $120 then the 'Amount to Apply' will default to $120

- If a payment of $150 is received but the invoice total is $170 then the 'Amount to Apply' will default to $150

### How do I apply a payment to an invoice, tax authority, billing account or another payment?

Example: To appy a payment to an invoice, tax authority, billing account or another payment

1. Select the 'Applications' sub menu for the payment
2. Using the 'Apply this payment to' box at the bottom of the screen
3. Enter or use the lookup to enter the 'Invoice Id' to apply the payment to (NOTE: This can be used if the invoice is to another party eg ordered by a subsidiary but paid for by another company of the same group)
4. Enter or use the lookup to enter the 'To Payment Id' to apply the payment to if required (NOTE TO CHECK: How does this work....?)
5. Enter or use the lookup to enter the 'Billing Account Id' to apply the payment to if required
6. Enter or use the drop down box to select the 'Tax Auth Geo Id' to apply the payment to if required (NOTE TO CHECK: This is a country so need to test how this actually works......)
7. Enter an amount in the 'Amount to Apply' (NOTE: This must be less than or equal to the payment amount)
8. Press the 'Apply' button

# 04 Transactions

## Definition: What is it?

See Gateway Responses

## What is it used for?

See Gateway Responses

## What's on the screen?

See Gateway Responses

Children Hide Children | View in hierarchy

04.1 Authorize (OFBiz End-User Documentation)

04.2 Capture (OFBiz End-User Documentation)

04.3 Gateway Responses (OFBiz End-User Documentation)

04.4 Manual Electronic Transaction (OFBiz End-User Documentation)

## 04.1 Authorize

### Definition: What is it?

An authorization is a temporary transaction that shows a commitment to take money from an account.
The 'Authorize' process is the first step in allowing a sales transaction payment to be accepted. In OFBiz a service would be defined to carry out the authorisation process each time for example, a credit card is used. It will perform specific validation tests before the payment can be classes as 'authorised'.
When a payment is authorised it means that it has been validated and that the credit card or bank account has been checked to ensure that it has sufficient funds available to cover the proposed transaction. A number or code may be issued as evidence of the authorisation.
NOTE: In the 'Payment' settings for a store as part of the Product Payment setup the user can specify various services that will process a payment transactions through to completion. This includes the following:

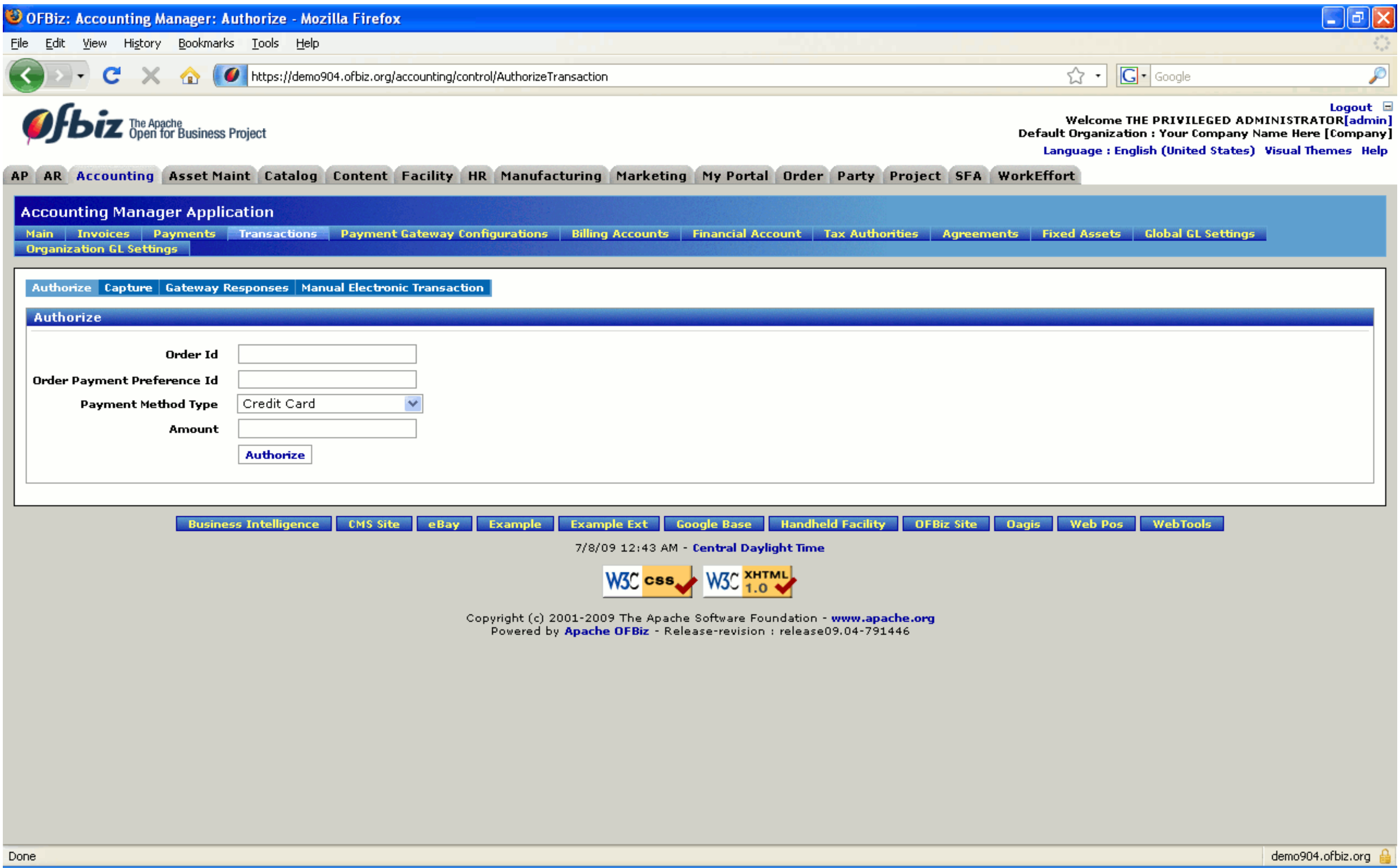
- Payment Authorisation
- Payment Capture
- Payment Credit
- Payment Authentication Verification
- Payment Re-Authorisation
- Payment Refund
- Payment Release Authorisation

### What is it used for?

It is used to provide verification and approval for the first step of the sales transaction payment process.
An 'Authorize' button is also displayed on Sales Order detail screen if a Credit Card payment was specified for a sales order. This is probably a more natural place for a payment transaction to be authorised.
See also Authorizations as an example of how authorisations are used for Financial Accounts.
NOTE: Using OFBiz demo data if DemoCustomer uses their credit card for payment then an transaction is created that is automatically authorised and can be viewed using the Gateway Responses.

### What's on the screen?

To
do




## How do I create and authorise a transaction?

To create and authorise a transaction

1. Enter the 'Order Id' of the sales order for which payment is being made
2. Enter the 'Order Payment Preference Id' (NOTE: This is automatically generated at sales order creation and may be difficult to find out...I found it by initially doing an order and then paying by DemoCustomer's credit card and checking Gateway Responses for what was displayed in that field for the order)
3. Select the 'Payment Method Type' (NOTE TO CHECK: What happens if you use other selections not just credit card?)
4. Enter the 'Amount'
5. Press the 'Authorize' button
6. A new transaction should be displayed with the status of authorised
   NOTE TO CHECK: Need to investigate how to to do this. The demo data payment settings for the Payment authorisation Service is set to always approve so no transactions will display here because of this. Need to test and maybe try removing the 'always approve' to see if the transaction will be created as 'unauthorised '

NOTE TO CHECK: What is the difference between this and manual electronic transaction?

## 04.2 Capture

### Definition: What is it?

To do

### What is it used for?

To do

### What's on the screen?

To do

### How do I...?

## 04.3 Gateway Responses

### Definition: What is it?

To do

### What is it used for?

To do

### What's on the screen?

To do

### How do I.....?

## 04.4 Manual Electronic Transaction

### Definition: What is it?

To do

### What is it used for?

To do

### What's on the screen?

To do

#### How do I create a manual electronic transaction?

To do

#### How do I update a manual electronic transaction?

To do

#### How do I delete a manual electronic transaction?

To do

# 05 Payment Gateway Config

## Definition: What is it?

See Payment Gateway Config

## What is it used for?

SeePayment Gateway Config

## What's on the screen?

See Payment Gateway Config

# 05.1 Payment Gateway Config

## Definition: What is it?

To do

## What is it used for?

To do

## What's on the screen?

To do

## How do I...?

To do

# 05.2 Payment Gateway Config Types

## Definition: What is it?

To do

## What is it used for?

To do

### What's on the screen?

To do

#### How do I....?

To do

# 06 Billing Accounts

## Definition: What is it?

A billing account is a way of allowing customers to consolidate several invoices into an account that is paid off at a later date.
Customers can be allocated a credit limit and orders can be taken up to the value of the credit limit without any payment being made. Statements to the customer can then be generated (eg monthly) and payment is made based on the outstanding amount.
NOTE: A billing account does not change the flow of the normal Invoice and Payment processes. It simply allows for a more structured organisation of Invoices and Payments.

## What is it used for?

Uses include:

- Setting credit limits for customers
- Keeping track of credit available to customer for purchase on account
- Keeping track of payments made in advance (NOTE TO CHECK: Could also use Financial Account for advance payments but need to understand the differences in functionality and process)
- Keeping track of a subset of payments and invoices for a specific client, i.e. allowing them to have multiple billing accounts (NOTE TO CHECK: This is from David - does this mean having multiple accounts for one customer or does it mean one billing account can track a hierarchy of invoices and payments.....)
- Allow multiple authorised parties to bill against the same account which one party is responsible for paying (e.g. different offices of the same organisation may have one single account with a supplier to make use of order volume discounts)
- Managing and generating customer statements ??
- Customer specific order tracking
- Accounts Receivable / Debt Management
- Analysis and monitoring customer spending (creditworthiness / discounts / product popularity ???)

TO DO: Check for more uses

NOTE: A payment that is applied (or matched) to a Billing Account it should still be applied to an invoice. In the case where the payment arrives before the invoice has been generated then once the invoice is generated it should be applied to the payment or payments.
The billing account 'Terms' menu include an option to setup limited terms (including payment terms) for a customer. Details of current options available to be defined are listed below:

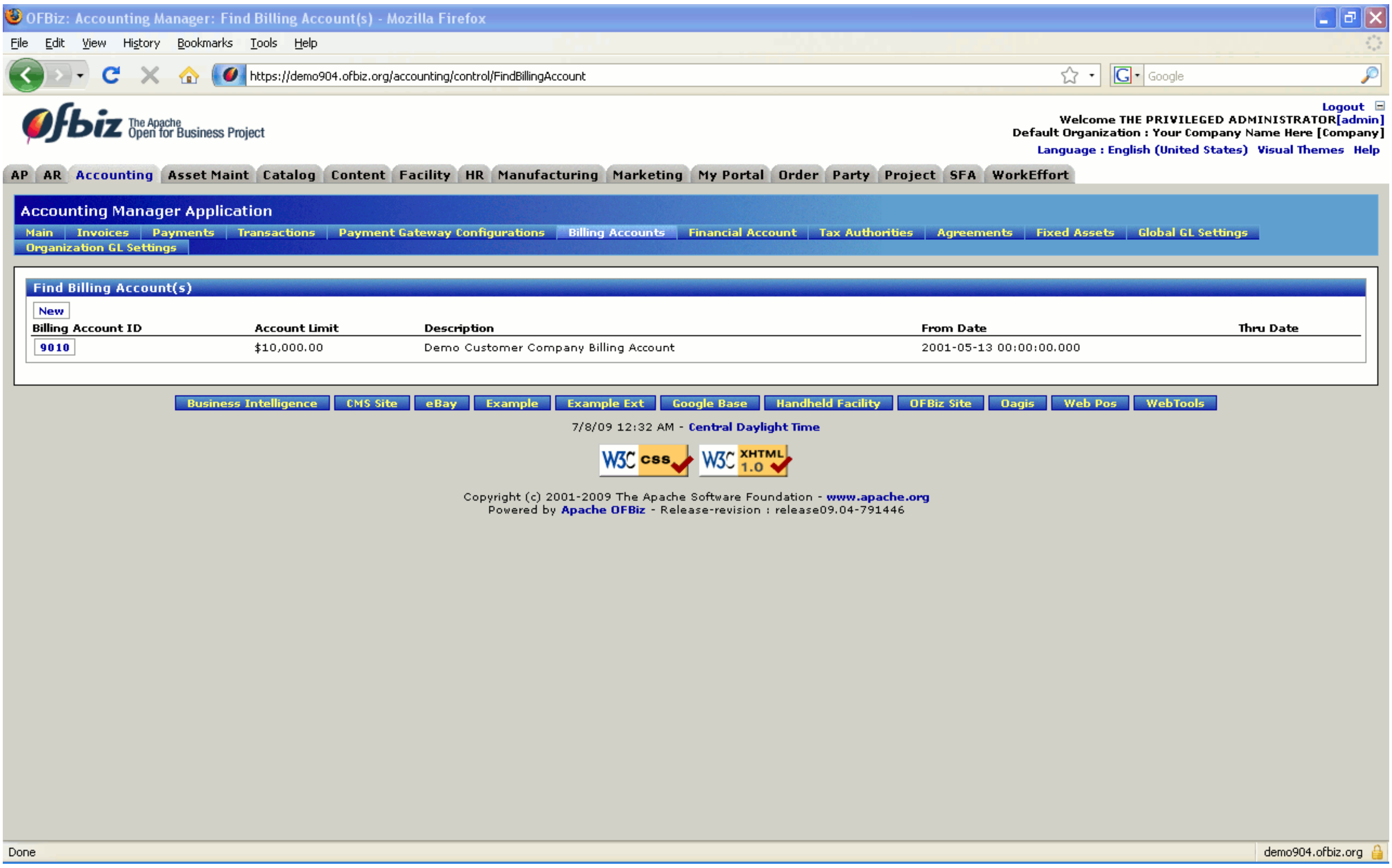
- Late Fee
- Prompt Payment Discounts
- Payment due of specified date per month (eg 20th of the month following invoice date)
- Payment due in days (eg 30 days)
- Penalty for Collection agency (NOTE: Not sure what the difference is between this and Late Fee......?)
- Non returnable sales item

NOTE: If statement processing is included then need to look at processes around aging of debtors

## What's on the screen?

The default screen displays a list of all Billing Accounts with details of the billing account identifier, credit limit, description as well as the agreement start and end dates.

TO DO:Add in a screen shot?




Children Hide Children | View in hierarchy

06.1 Account (OFBiz End-User Documentation)

06.2 Roles (OFBiz End-User Documentation)

06.3 Terms (OFBiz End-User Documentation)

06.4 Invoices (OFBiz End-User Documentation)

06.5 Payments (OFBiz End-User Documentation)

06.6 Orders (OFBiz End-User Documentation)

## 06.1 Account

### Definition: What is it?

The 'Account' sub menu is used to enter the basic details required for setting up a new billing account or editing an existing one.
Other Billing Account details can be added or amended using the other sub menus as follows:

- Roles

- Terms
- Invoices
- Payments
- Orders

## What is it used for?

It is used to create or update the following details for a Billing Account:

- Billing Account Identification
- Party to be Billed
- Billing Account Limit (NOTE: This is how much credit the customer will be given eg $5000)
- Currency to be used for Billing Account
- Start and End Dates

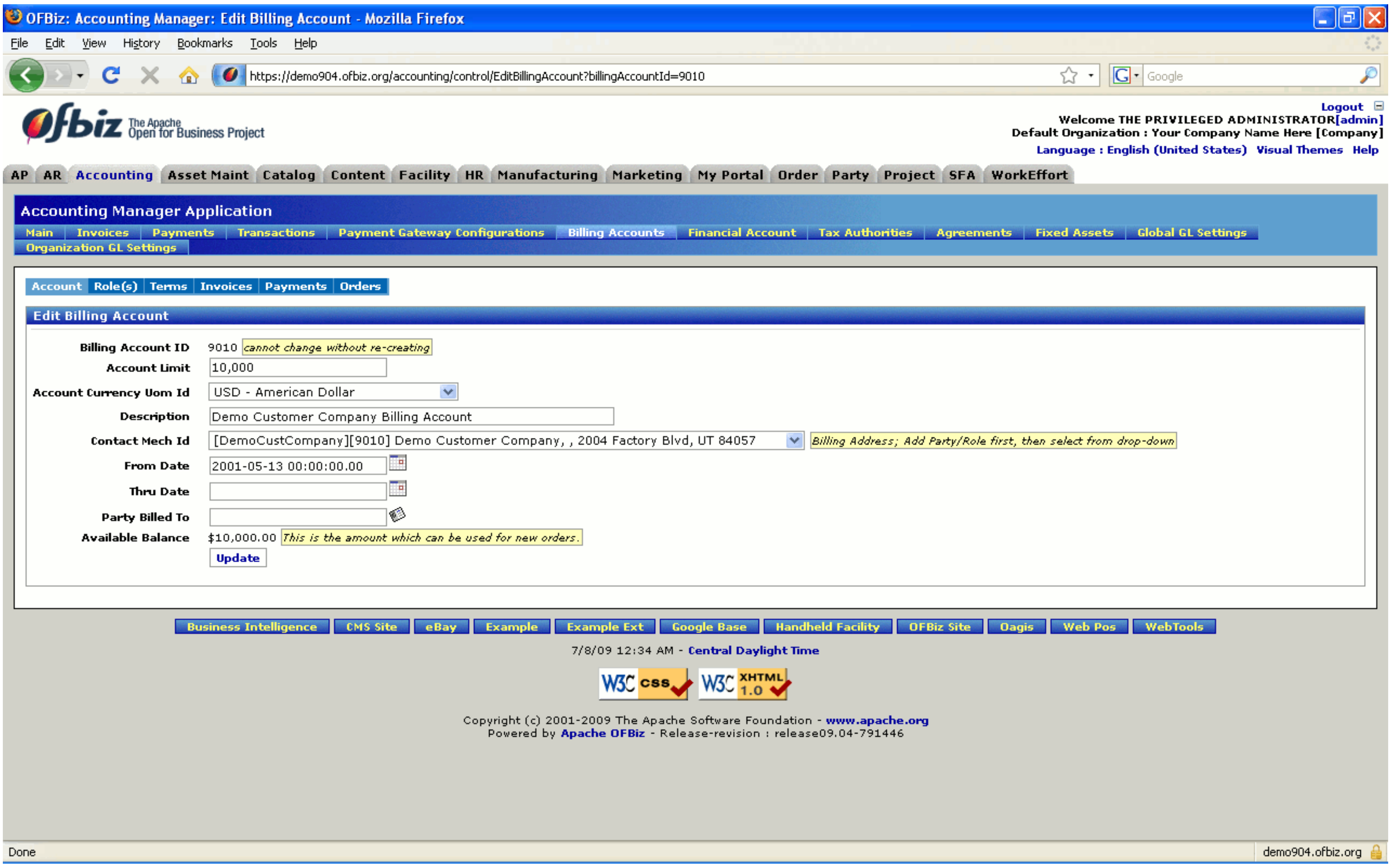
NOTE: There are currently two ways to add a party to a billing account.

1. Enter a party id in the 'Party Billed To' field
2. Use the 'Roles' sub menu to add a party id with the role of 'Bill To Customer'

If using the first method then when you press the update button this removes the party id from this field and automatically creates the party under the Roles sub menu with the role of 'Bill To Customer'

## What's on the screen?

To do



## How do I create a new Billing Account?

NOTE TO CHECK: If the party doesnt have the role 'Bill To Customer' is it automatically added when the billing account is created or will the creation fail?..........
Example: To create a new Billing Account

1. Press the 'New' button and the 'Edit Billing Account' screen is displayed
2. Enter a code or number for the  'Billing Account Id' (NOTE: If this is left blank a number will be automatically generated)
3. Enter a number for the 'Billing Account Limit' (eg 5000)
4. Leave the 'Account Currency UOM Id' as it is (NOTE: This should be the default currency for Company...)
5. Enter a description that can be used to identify the Billing Account (eg Joe Bloggs Builders Billing Account)
6. Leave the 'Contact Mech' field as it is (NOTE: This field cannot be filled in until either the 'Party Billed To' has been filled in or a party with the role of 'Bill To Customer' has been added under the 'Roles' sub menu

7. Enter the Billing Account start date in the 'From Date' field. (NOTE: If left blank then this will default to the current date and time. NOTE TO CHECK: Can this date be in the future.....?)
8. Leave the 'Thru date' field blank
9. Enter or use the lookup to select the 'Party Billed To'
10. Press the 'Update' button
11. After the 'Update' button has been pressed then the 'Contact Mech Id' field will either be automatically filled in or will allow you to select a contact mech from a drop down list

### How do I update an existing Billing Account?

Billing Account details can be updated. A key field that may need to be updated is the actual Billing Account Limit if a customer reduces or improves their credit rating
Example: To update an existing Billing Account

1. Click on the 'Billing Account Id' of the Billing Account to updated
2. The 'Edit Billing Account' screen is displayed
3. Enter the changes required
4. Press the 'Update' button

NOTE: The Billing Account Id cannot be amended and in some cases the Contact Mech Id may not allow an update. The limited update for the Contact Mech Id is related the Party setup.

### How do I delete a Billing Account?

Billing Accounts cannot be deleted. They can only be expired. This means that they will no longer be able to be used to associate invoices or payments against.
Example: To expire a Billing Account

1. Click on the 'Billing Account Id' of the Billing Account to be expired
2. The 'Edit Billing Account' screen is displayed
3. Enter the current date in the 'Thru date' field
4. Press the 'Update' button

## 06.2 Roles

### Definition: What is it?

This sub menu allows parties with specific roles to be associated with to a Billing Account. Roles allows you to specify a party role.

NOTE TO CHECK: Is the 'Bill To Customer' role compulsory for a Billing Account? What other roles can be used that affect the billing account?

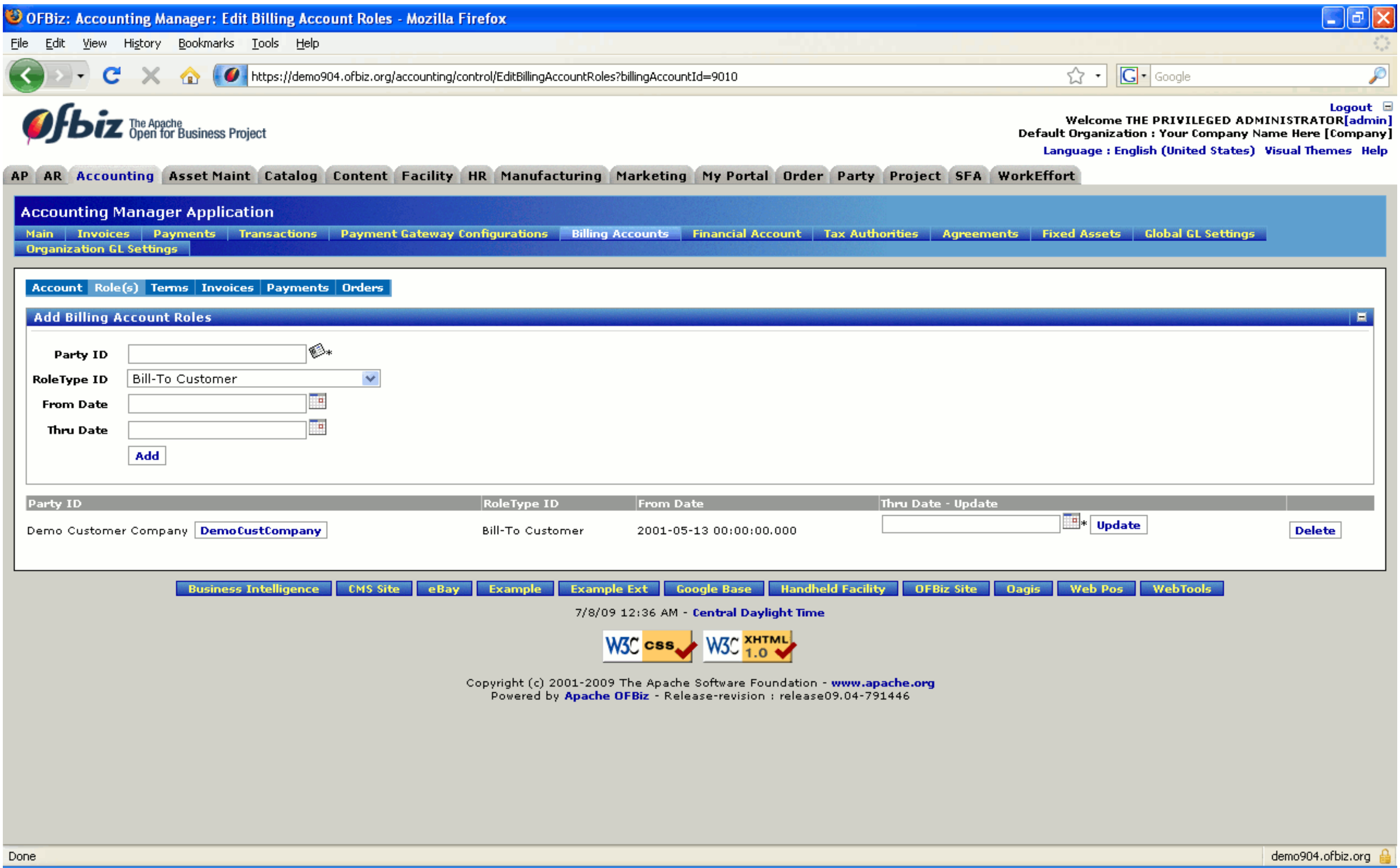
## What is it used for?

It is used to specify which party should be billed for the billing account. It can be used as follows:

- Simple billing account for a single party
- More complex billing account where multiple parties (eg company subsidiaries) charge invoices to the billing account but a different party (eg head office) will pay the account

## What's on the screen?

To do



## How do I add a party role to a billing account?

Example: To add a party role to a billing account

1. Select the 'Roles' sub menu
2. Enter or use the lookup to select the 'Party Id'
3. Select the 'Role Type Id' from the drop down box (eg Bill To Customer)
4. Leave the 'From Date' blank (NOTE: If left blank it will default to the current date and time)
5. Leave the 'Thru Date' blank
6. Press the 'Add' button
7. The new party role is displayed at the bottom of the screen

## How do I update a party role for a billing account?

The only field that can be updated for a party role is the 'Thru Date'. If any other details need to be amended then the entry will need to be deleted and then recreated.
Example: To update a party role for a billing account

1. Select the 'Roles' sub menu
2. Locate the entry that needs to be amended
3. Enter or use the lookup to enter the 'Thru Date'
4. Press the 'Update' button for the entry

## How do I delete a party role from a billing account?

Example: To delete a party role for a billing account

1. Locate the entry that needs to be deleted
2. Press the 'Delete' button next to the entry
3. The entry will be removed from the bottom of the screen

## 06.3 Terms

### Definition: What is it?

This sub menu allows terms to be associated with a billing account. Currently these can be the following:

- payment terms (discounted if paid within specified days)
- payment terms (due on a specified day per month)
- payment terms (net days)
- penalty terms (late fee)
- penalty terms (collection agency fee)
- miscellaneous (non returnable sales item)

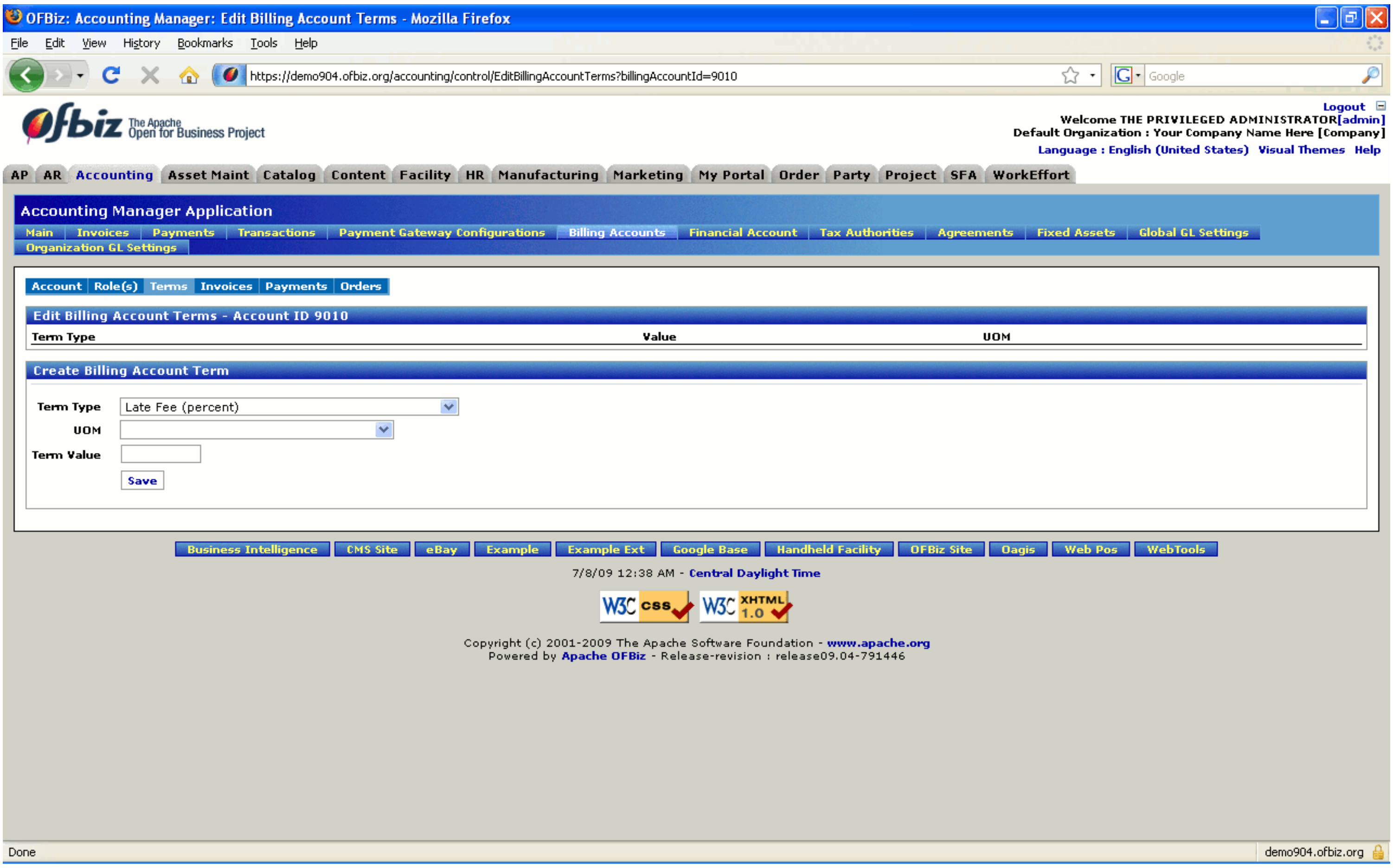
NOTE: There is an overlap here with the terms that can be specified in an agreement. Would a billing account party also have an agreement for payment terms...?

### What is it used for?

It is used to add a list of specific terms to a billing account. The terms available here are a subset of the total list of terms that can be setup for an agreement.

## What's on the screen?

To do




## How do I add terms to a billing account?

Example: To add terms to a billing account

1. Select the 'Terms' sub menu
2. Select a 'Term Type' from the drop down box (eg. Payment net days)
3. Leave the 'UOM' field blank
4. Enter a number in the 'Term Value' field (eg. 30 which would mean '30 days' when related to 'Payment net days')
5. Press the 'Save' button
6. The term is displayed in the top part of the screen

### How do I update terms for a billing account?

Example: To update terms for a billing account

1. Select the 'Terms' sub menu
2. Press the 'Edit' button next to the entry that needs to be amended
3. The details are displayed in the 'Edit Billing Account Terms' box
4. Update the 'Term Type', 'UOM' or 'Term Value' as required
5. Press the 'Save' button
6. The updated term is displayed in the top part of the screen

### How do I remove terms from a billing account?

Example: To remove terms for a billing account

1. Select the 'Terms' sub menu
2. Press the 'Delete' button next to the entry that needs to be removed

## 06.4 Invoices

### Definition: What is it?

The Billing Account Find Invoices screen displays by default a list of invoices that have been charged to the billing account.
Any invoice displayed here means that its invoice amount has been deducted from the billing account credit limit.For example: If the Billing Account Credit Limit is $100 and the there are 2 invoices displayed with amounts $10 and $25 then the available credit for the billing account will be $75.

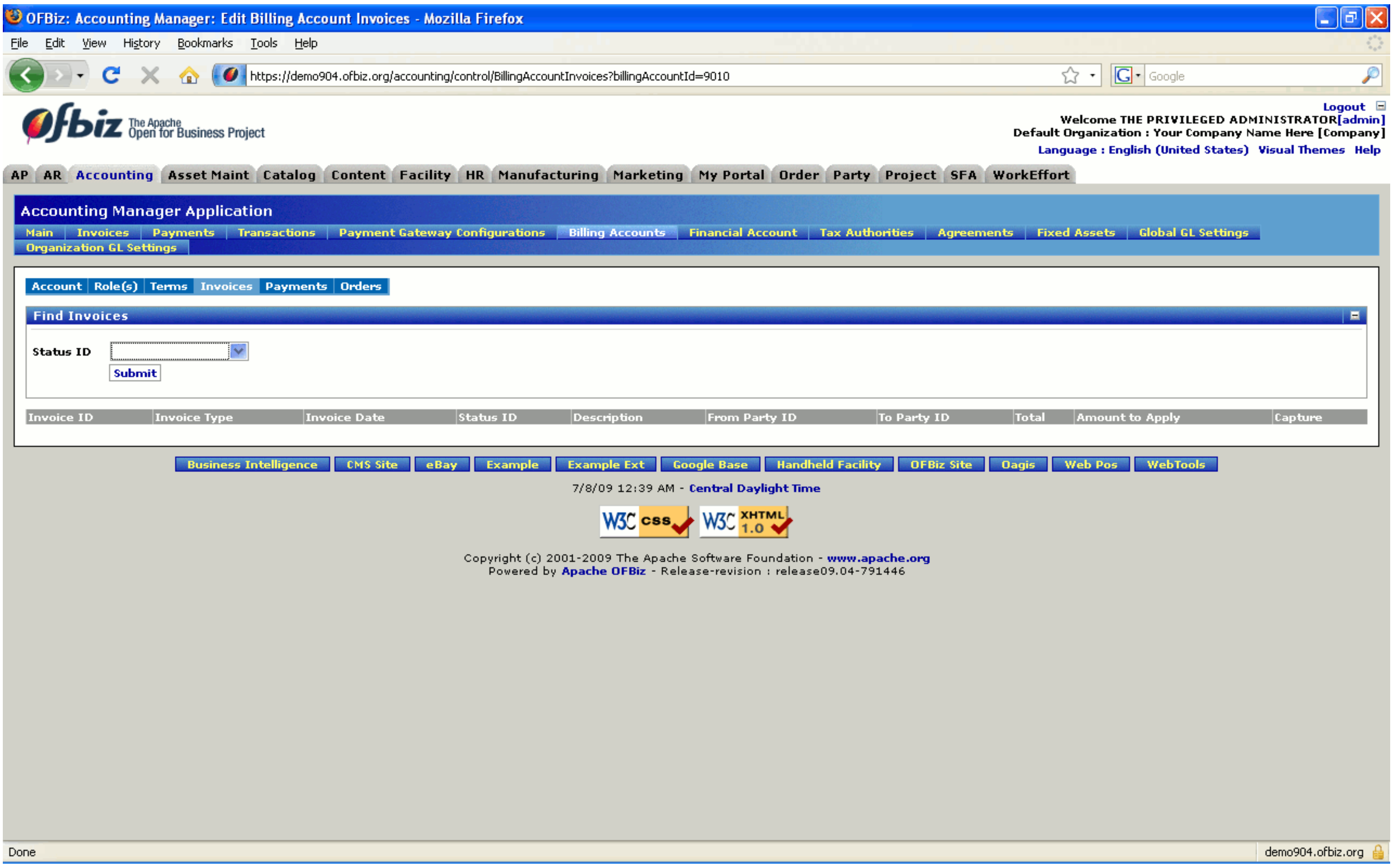
### What is it used for?

It is used to display a list of invoices that have been charged to the Billing Account. The invoice can be at various statues and there is an option to locate an invoice by status.
It is also used to apply any payments that have been made into the Billing Account to an invoice.
A 'Capture' button is displayed next to each invoice displayed that has an amount outstanding.
Example:

- Two invoices are charged to a Billing Account (Invoice A $10 and Invoice B $25)
- A payment of $17 has been paid into the Billing Account
- If the Capture button is pressed for the invoice A then $10 of the $17 payment will be applied to this invoice and a new payment transaction of $7 will be created and available to apply to a different invoice

## What's on the screen?

To do



## How do I locate an invoice by status?

Example: To locate an invoice by status

1. Select the 'Invoices' sub menu
2. Use the drop down box to select the 'Status Id' for the invoice required
3. Press the 'Submit' button
4. A list of invoices with the required status will be displayed

### How do I capture a payment for an invoice?

IMPORTANT: In order for this to work a payment needs to have been made to the billing account that has not been completely applied to any other invoices. Payments to a billing account can be done via the 'Payments' sub menu for the billing account or by using Accounting / Payments menu.
Example: To capture a payment for an invoice

1. Select the 'Invoices' sub menu
2. Locate the invoice required (NOTE: The 'Amount to Apply' is the same as the 'Total' column)
3. Press the 'Capture' button (NOTE: The 'Amount to Apply' is different to the 'Total' column)
4. The 'Capture' button is no longer displayed next to the invoice and an additional payments transaction will be created for any difference between the invoice total and the amount paid (Eg Invoice Total $100, Payment Amount $125, the new payment transaction amount will be $25)

NOTE: The above example assumes that the payment available will cover the total amount outstanding for the invoice

## 06.5 Payments

### Definition: What is it?

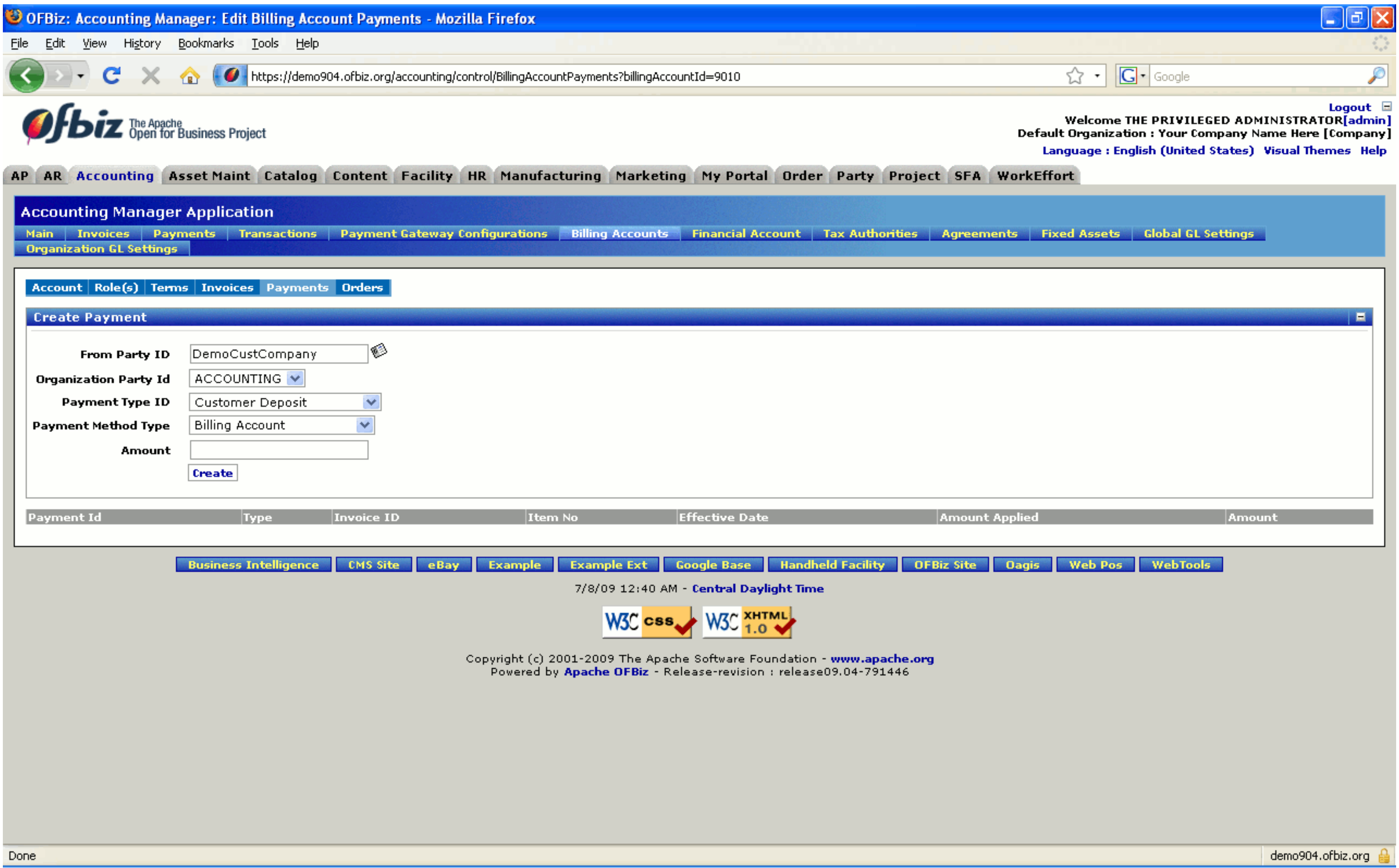
This sub menu allows the creation of a payment that is automatically applied to the billing account.

### What is it used for?

It is used when a payment has been received from a customer that is used to pay off the balance (or part balance) of a billing account.
An example of how this works is similar to a credit card statement where a list of transactions have been incurred over the previous month and one payment is used to settle the outstanding balance.

## What's on the screen?

To do




## How do I add a payment to a billing account?

Example: To add a payment to a billing account

1. Select the 'Payments' sub menu
2. The 'Create Payment' screen is displayed
3. Enter or use the lookup to enter the 'From Party Id'  (NOTE: By default this will be the Bill To Party of the Billing Account)
4. Select the 'Organisation Party Id' from the drop down box
5. Select the 'Payment Type Id' from the drop down box (NOTE: By default this will be set to 'Customer Deposit')
6. Leave the 'Payment Method Type' as 'Billing Account' (NOTE TO CHECK: What happens if you do change this....)
7. Enter the 'Amount' of the payment
8. Press the 'Create' button
9. The new entry is displayed at the bottom of the screen.

NOTE: The total amount of the payment will be applied to the Billing Account. This can be verified by going to Accounting / Payments menu and locating the newly created payment. The 'Amount to Apply' column will be zero.

## How do I update a payment for a billing account?

A payment can be updated for a billing account by amending the amount of the payment that has been applied to the billing account. For example if a payment of $100 has been applied to a billing account it can be amended so that only $75 will be applied and $25 will be available to be applied elsewhere.
Example: To update a payment for a billing account

1. Click on the 'Payment Id' of the payment that needs to be removed
2. The 'Payment Overview' screen is displayed
3. Press the 'Update' button in the 'Payments Applied' box
4. The 'Payment Applications' screen is displayed
5. Locate the 'Billing Account Id' and 'Amount Applied'
6. Amend the 'Amount Applied' for the billing account
7. Press the 'Update' button next to the entry that refers to the 'Billing Account Id'
8. A message will be displayed saying that the payment has been removed from the billing account

## How do I delete a payment from a billing account?

A payment can be removed from billing account by removing the link that has applied the payment to the billing account.
NOTE TO CHECK: Couldnt change the status of the payment to 'Cancelled' from 'Not Paid' - why not ? Need to look and understand the process.....
Example: To remove a payment from a billing account

1. Click on the 'Payment Id' of the payment that needs to be removed
2. The 'Payment Overview' screen is displayed
3. Press the 'Update' button in the 'Payments Applied' box
4. The 'Payment Applications' screen is displayed
5. Press the 'Remove' button next to the entry that refers to the 'Billing Account Id'
6. A message will be displayed saying that the payment has been removed from the billing account

NOTE TO CHECK: This example was done when the payment status was at 'Not Paid' - need to test if it still works if the payment status is at 'Received' or 'Confirmed' too.

## 06.6 Orders

### Definition: What is it?

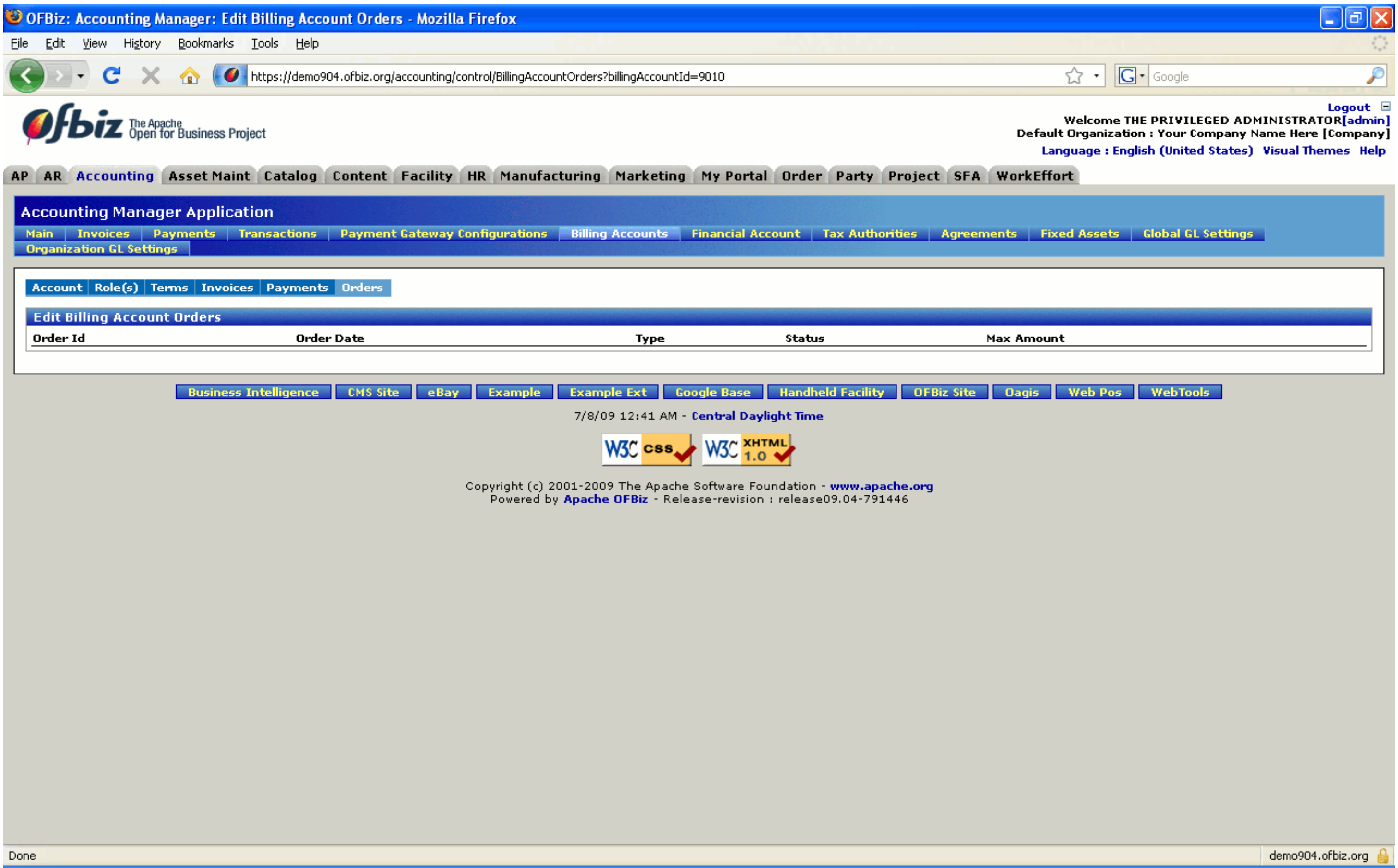
This sub menu lists the details of any Sales Orders that have been charged to the billing account. A Sales Order is charged to a billing account by selecting the billing account as the Payment Method.

### What is it used for?

It is used to display the list of Sales Orders that have been charged to a specific billing account.
NOTE: The details displayed here in conjunction with the 'Payments' sub menu could also be used to generate a customer statement or account showing details of customer activity during a specified time period.

### What's on the screen?

To do



# 07 Financial Accounts

## Definition: What is it?

A financial account is a tool (similar to bank account statement) that is used for monitoring monetary transactions. Normally they will be linked to a party and the various transactions details (eg payments or receipts) will be shown as entries.
The entries for a financial account can be displayed using the 'Financial Account' tab in Accounting or in Party Manager if you enter a party as the owner of the financial account.
Currently in OFBiz financial accounts can have the following types:

- Bank Account (by default this type will post to 213500 CUSTOMER DEPOSIT ACCOUNTS)
- Deposit Account (by default this type will post to 213500 CUSTOMER DEPOSIT ACCOUNTS)
- Gift Certificate (by default this type will post to 213200 GIFT CERTIFICATES UNREDEEMED)
- Investment Account (by default this type will post to 213500 CUSTOMER DEPOSIT ACCOUNTS)
- Replenish Account (no default posting account in demo data setup)
- Service Credit Account (no default posting account in demo data setup)

NOTE:

1. In GL Account Defaults there is a specific tab 'FinAccount Type Gl Account' for specifying which type of Financial accounts are posted to which general ledger account.
2. In GL Account Defaults there is also a tab 'Payment Method Id / GL Account ID' for specifying the account to post transactions to if 'Financial Account' is selected as the Payment Method instead of (Cash, Cheque, Credit Card, etc). By default the demo setup posts transactions to 111100 GENERAL CHECKING ACCOUNT.

You can also setup each financial account to post to a specific general ledger account for each party. This is done via a specific field during the creation or update of a financial account. This will override the default setting by type.

## What is it used for?

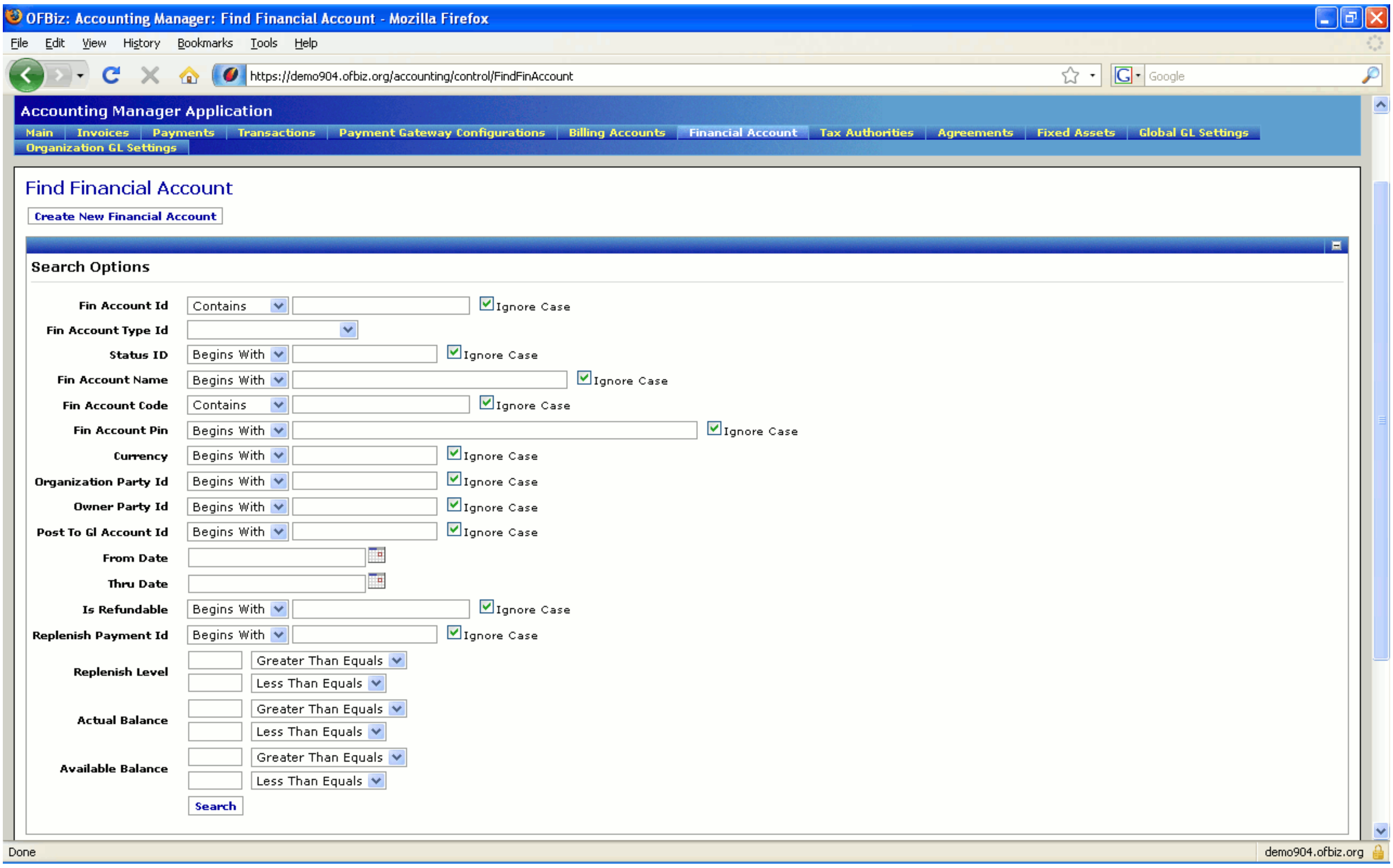
These include:

- Managing and Tracking Customer Prepaid Accounts
- Managing and Tracking Customer Credit Limit (NOTE: Need to verify this)
- Managing Electronic Gift Certificates / Gift Vouchers/ Gift Card
- Reload of Electronic Gift Card
- Company Bank Account Transaction Tracking ???????

NOTE: Need to investigate use of financial account to track company bank account so can mirror bank statement on screen with Financial account.

## What's on the screen?

TO DO




## How do I create a financial account?

Example: To create a financial account for a customer.
Select the 'Create Financial Account' button near the top of the screen

1. The 'Create/Update Financial Account' screen is displayed.
2. Keep the default entry of 'Deposit Account' for the Fin Account Type field
3. Keep the default entry of 'Active' for the status field
4. Enter a description (eg ABC Customer Prepaid Account) for the 'Fin Account Name' field
5. Leave the Fin Account Pin field blank (NOTE TO CHECK: I think this is only used in creation of Gift Cards and Certificates..)

6. Leave the Fin Account Code field blank (NOTE TO CHECK: I think this is only used in the creation of Gift Cards and Certificates...)
7. The currency field will be the default currency of Company (eg USD). If this account is to be in another currency (eg EUR) then select it from the drop down list.
8. Leave the Organization Party ID field blank (NOTE TO CHECK: Need to investigate where this is used..)
9. Fill in the Owner Party Id field with the party id of the customer who has the Financial Account (eg DemoCustomer or DemoCustCompany)
10. Fill in the 'Post to Gl Account field' to post the transactions for this financial account to post to a specific GL Account
11. Select the current date from the calendar to fill in the 'From date' field (NOTE: It can be left blank and still appears to work)
12. Leave the 'Thru date' field blank (NOTE TO CHECK: I think this could be used to close or stop the use of an account ..)
13. Leave the default of 'Is Refundable' as 'Y' (NOTE TO CHECK: I think this will allow money to be refunded to this account - eg if you have a return or credit for the customer)
14. Leave the 'Replenish Payment ID' blank (NOTE TO CHECK: Not sure what this is - maybe to automatically replenish account if it gets to a certain limit???)
15. Leave the 'Replenish Level' blank (NOTE TO CHECK: Not sure what this is but probably linked to Replenish Payment ID where you set the limit - eg $100)
16. Press the 'Update' button and message appears saying that the account was successfully created

NOTE: The above process creates the basic financial account detail with a zero available balance but there are further details that can be added via the other financial account sub menus. There are four sub menus which make us the financial account. These are as follows:

- Financial Account (NOTE: This is completed by default when you create a financial account)
- Roles
- Transactions
- Authorizations

## How to I update a financial account?

Example: To update a financial account

1. Press the 'Search' button on the Financial Account main screen
2. A list of all existing Financial Accounts will be displayed
3. Select the Financial Id of the account that needs to be updated
4. The 'Create/Update Financial' screen is displayed
5. Update the details of the financial account
6. Press the 'Update' button

NOTE: Can also update a financial account using Entity Data Maintenance on the Webtools menu.

## How do I delete / remove a financial account?

Example : To delete or remove a financial account

1. Press the 'Search' button on the Financial Account main screen
2. A list of all Financial Accounts will be displayed
3. Press the 'Delete' button next to the Financial Account that you want to delete

NOTE: Can also delete a financial account using Entity Data Maintenance on the Webtools menu.
NOTE TO CHECK: What happens if to the financial account transactions if you delete the financial account? Will there be an problem of auditability???

## How do I create transactions for a financial account?

See Transactions

Children Hide Children | View in hierarchy
07.1 Financial Account (OFBiz End-User Documentation)
07.2 Roles (OFBiz End-User Documentation)
07.3 Transactions (OFBiz End-User Documentation)
07.4 Authorizations (OFBiz End-User Documentation)

# 07.1 Financial Account

## Definition: What is it?

The 'Financial Account' submenu is the first of four submenus used in the creation or update of a Financial Account. On the creation or update of a Financial Account it is the default screen that is displayed.

## What is it used for?

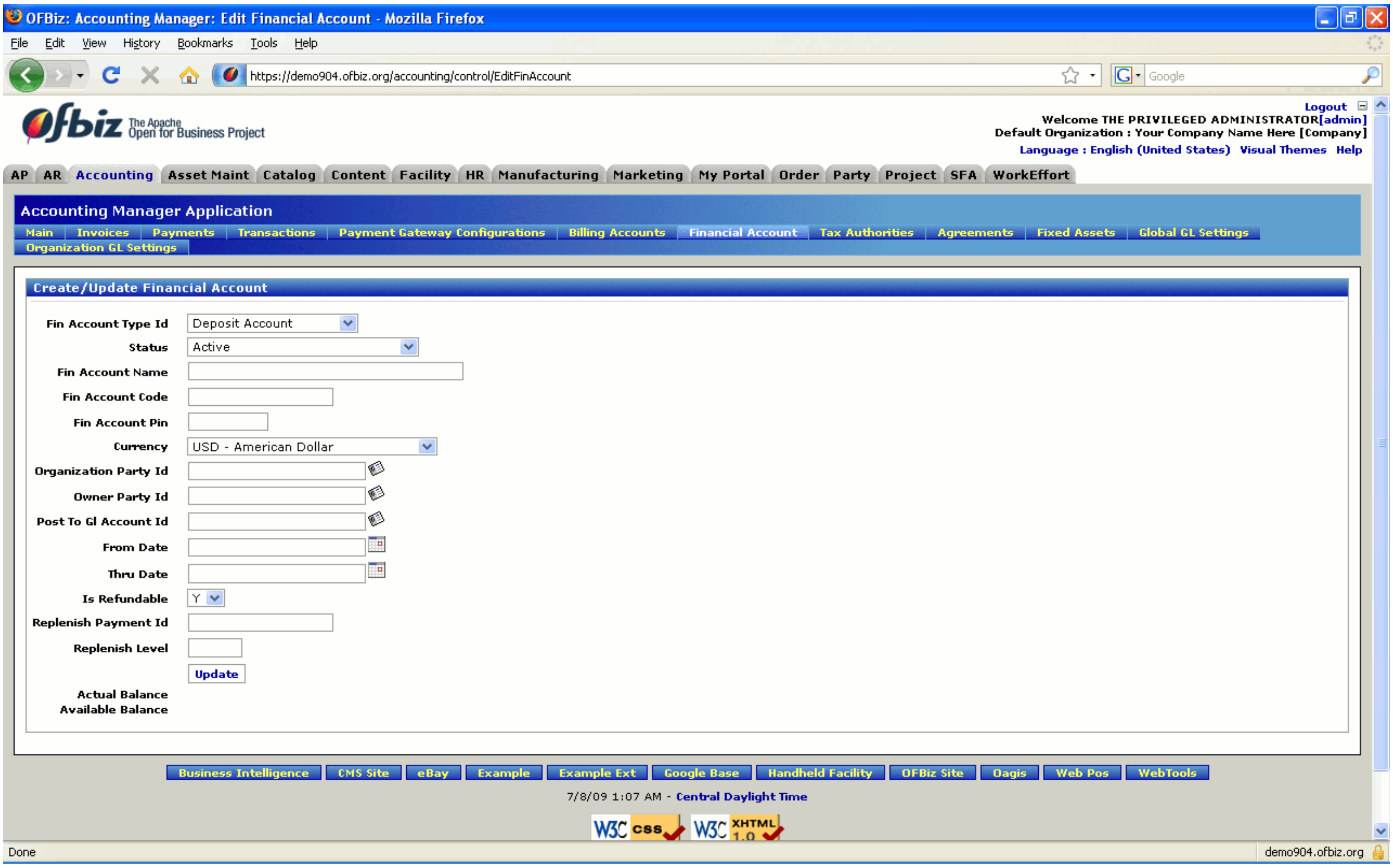
It can be used for updating the basic details of a Financial account such as:

- Type of Account (eg Deposit, Investment, Gift Certificate)
- Account Status (Active, Frozen, Cancel, etc)
- Account Name and Code
- Currency
- Owner Party ID

- Default GL Account for Posting
- Replenishment Level

## What's on the screen?

TO DO



# 07.2 Roles

## Definition: What is it ?

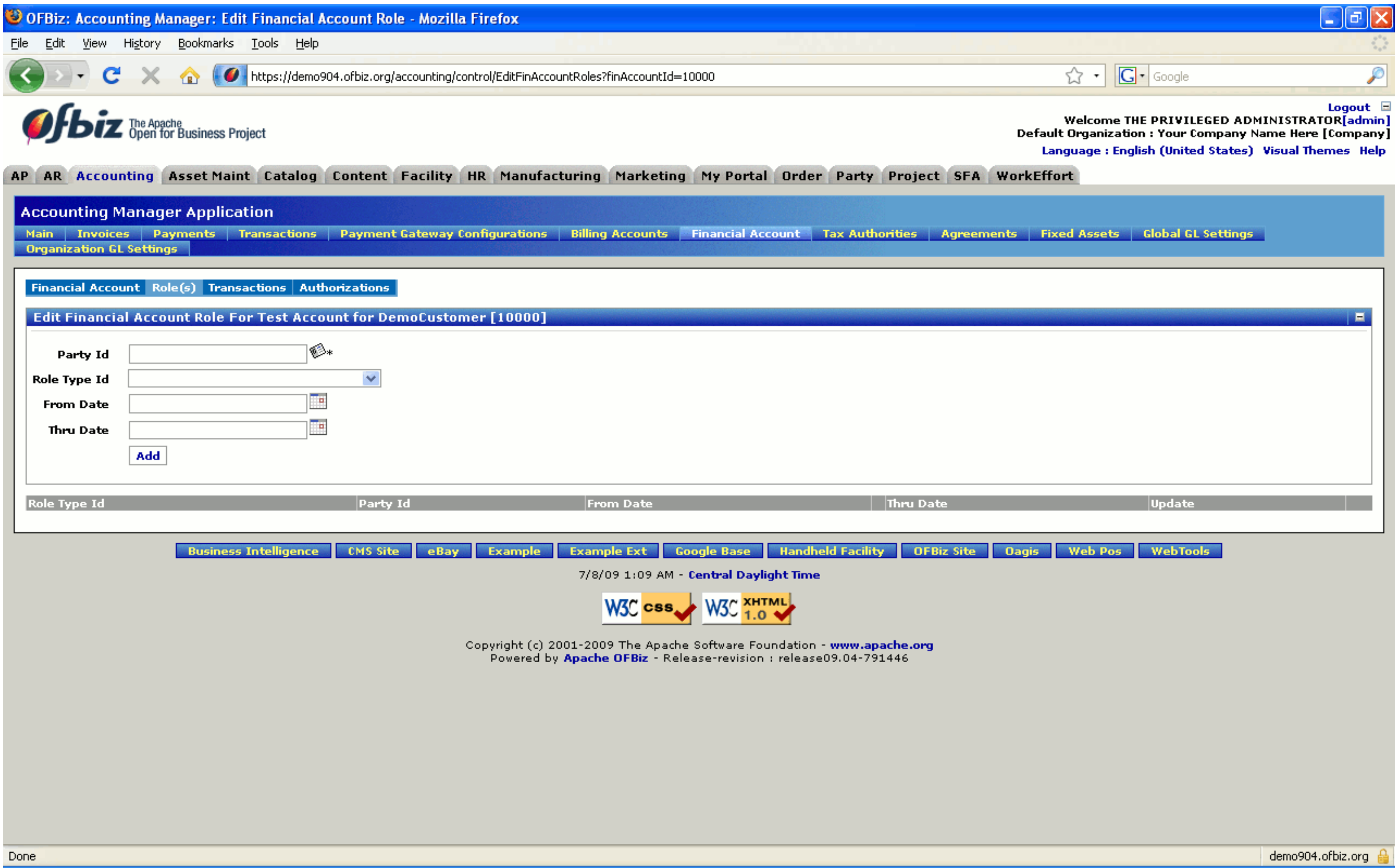
The Financial Account Roles sub menu screen allows you specify a party and link them to a role for a particular financial account.

## What is it used for?

It can be used to add party roles eg 'Approver' or 'Administrator' for credit limits or updates to the account. If an account belongs to a company then you may want to add a person as a 'Contact' for dealing with the account.
The roles can also be time bound. This means that you can specify a start and end date for the party role.

## What's on the screen?

TO DO




## How do I add a Party Role to a Financial Account?

Example: To a add a party role

1. Select the 'Roles' sub menu for the Financial Account

2. Fill in the Party Id field by using the field lookup tool or by directly entering the party id (eg flexadmin)
3. Select the role from the drop down list for the Role Type Id field (eg admnistrator)
4. Enter the From Date field
5. Enter if the Thru Date field (optional)
6. Press the 'Add' button

## 07.3 Transactions

### Definition: What is it?

A transaction is an entry that is shown on the financial account. Transactions can be one of the following types:

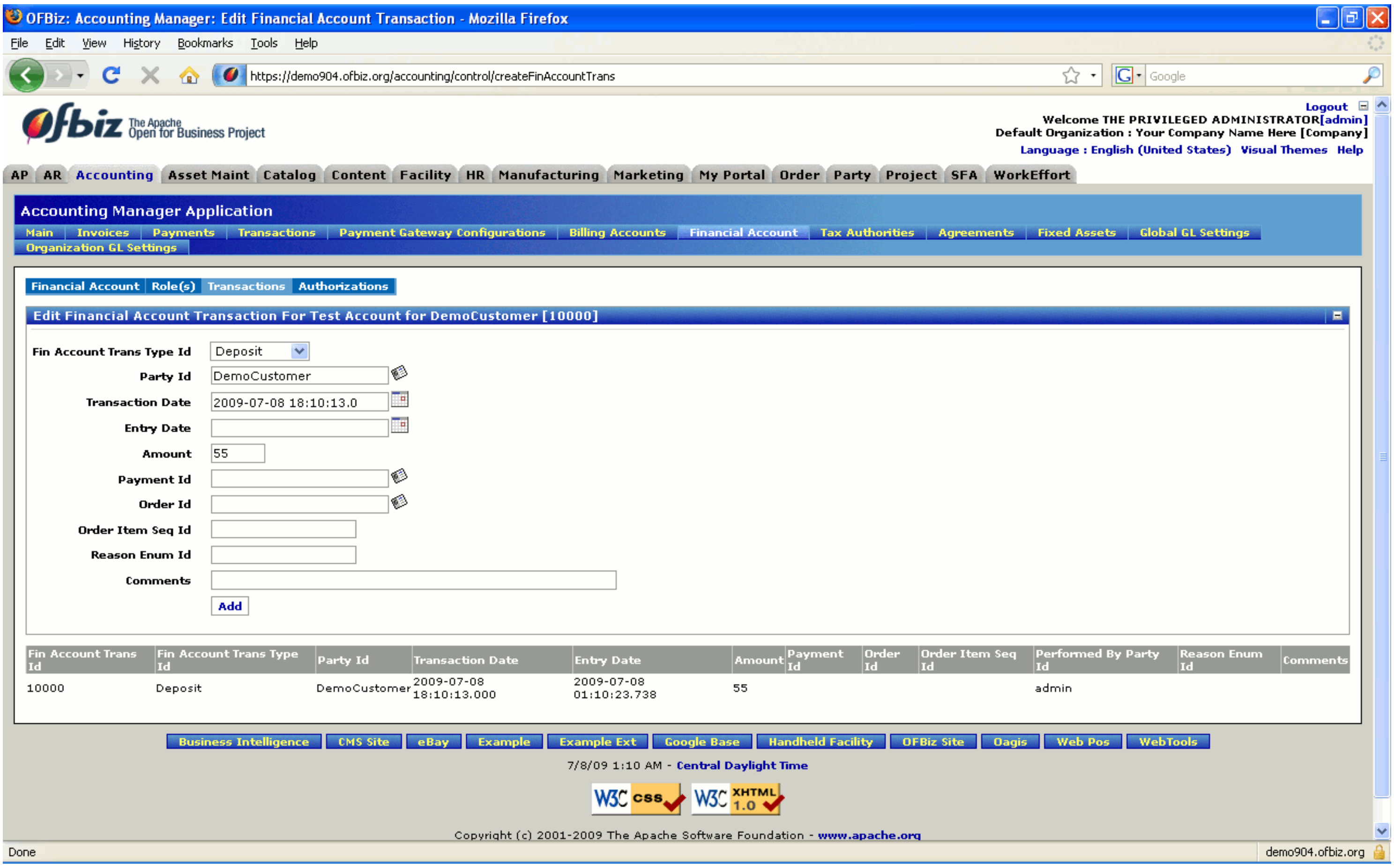
- Deposits
- Withdrawals
- Adjustments

### What is it used for?

Transactions are used to show entries and the financial history of the financial account. Similar to a bank account or credit card statement the transaction will show details of what was spent or paid into the account.

## What's on the screen?

TO DO



## How do I add transactions to a financial account?

This Financial Account Transactions sub menu screen allows you to add transactions to the financial account. During the financial account creation process you would either leave the transactions blank as nothing has yet been processed on the account or if it is being used as a statement (eg bank or customer) then you may want to bring in an opening balance. An example of how to bring in an opening balance is shown below:

1. Navigate to the the Financial Account Transactions sub menu
2. Select 'Adjustment' in the Fin Account Trans Type Id field
3. Leave the 'Party Id' field blank
4. Fill in the 'Transaction Date' field (NOTE TO CHECK: Does it need to be the same date or later than the opening date of the Financial Account???)

5. Fill in the 'Entry Date' field (NOTE TO CHECK: Need to check exactly what this is - is it the date the transaction is entered or is it the date the transaction is processed???)
6. Fill in the 'Amount' field with the transaction amount (Eg. In our case this is the opening balance such as 353.88 - dont think we need the $ sign)
7. Leave the 'Payment Id' field blank
8. Leave the 'Order Id' field blank
9. Leave the 'Order Item Seq Id' field blank
10. Leave the 'Reason Enum Id' field blank (NOTE TO CHECK: This could be useful in identifying transactions to a greater level of detail....)
11. Fill in the 'Comments' field (Eg: Opening Balance from XYZ Statement)
12. Press the 'Add' button and the transaction will be displayed at the bottom of the screen

NOTE: When you now view the Financial Account detail the 'Actual Balance' and 'Available Balance' fields will show the entered opening balance (eg 353.88)

### Other ways to add transactions to a financial account?

- By selecting financial account as a payment method for a customer
- By selecting financial account as a refund method for a customer
- Manually entering a transaction via webtools menu (not sure if this is a good way!)

## 07.4 Authorizations

### Definition: What is it?

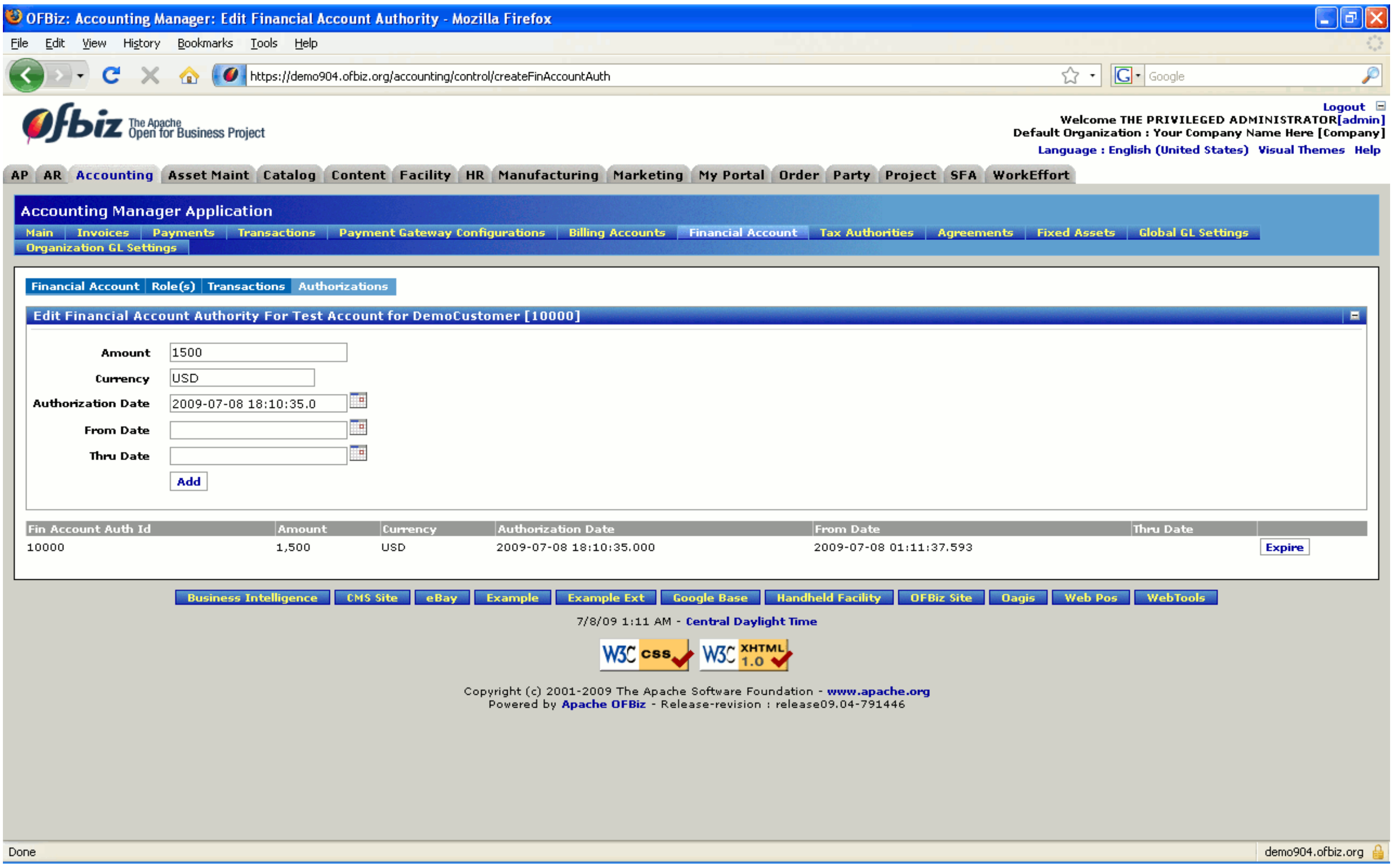
An authorization is a temporary transaction showing a commitment to take money from a financial account. It is like a 'transaction in progress' where there can be delay between when you buy something and the time it actually appears on your statement.
Authorizations can be time limit specific meaning that they can be controlled by entering a start and end date so that they are only valid for a certain length of time. They can also be expired. When an authorization is expired it removes the commitment from the financial account. The history of expired authorizations are shown on the financial account.
NOTE TO CHECK: What happens if an authorization makes the available balance go negative but actual balance is still positive as transaction is not yet fully processed....???

### What is it used for?

NOTE:This could be very useful in ensuring that customers are not overcommitted and keeping within their approved credit limits.

## What's on the screen?

TO DO




## How do I enter an authorization?

Example: To enter an authorisation

1. Enter an amount in the 'Amount' field (Eg 1000)
2. Leave the 'Currency' field blank as the default currency will be used
3. Enter a date in the 'Authorisation Date' field
4. Leave the 'From Date' field blank
5. Leave the 'Thru Date' field blank
6. Press the 'Add' button

NOTE: When you now view the Financial Account detail the 'Actual Balance' and 'Available Balance' fields will be different.

### How do I update an authorization?

An authorization cannot be updated. It can only be expired. If you have made a mistake and need to change an authorization then it needs to expired and then re-created correctly.
NOTE: You probably can do the update using Webtools and Entity Data Maintenance........

### How do I expire / remove an authorization?

Authorizations are not deleted they are instead expired. This means that the history of the authorizations will remain on the account as an audit trail.
Example: To expire an authorisation

1. Select the 'Authorizations' tab for the Financial Account
2. Any authorizations will be displayed at the bottom of the screen
3. If the authorization is still current the 'Thru Date' field will be blank (NOTE TO CHECK: May not always be true as you can specify a future date for it to expire......!!!)
4. Select the 'Expire' button next to the authorisation to be expired
5. The authorization is removed from the financial account and the screen is redisplayed with the 'Thru Date' field completed

# 08 Tax Authorities

## Definition: What is it?

A tax authority is legal body usually the state (country) that imposes a financial levy on business transactions.

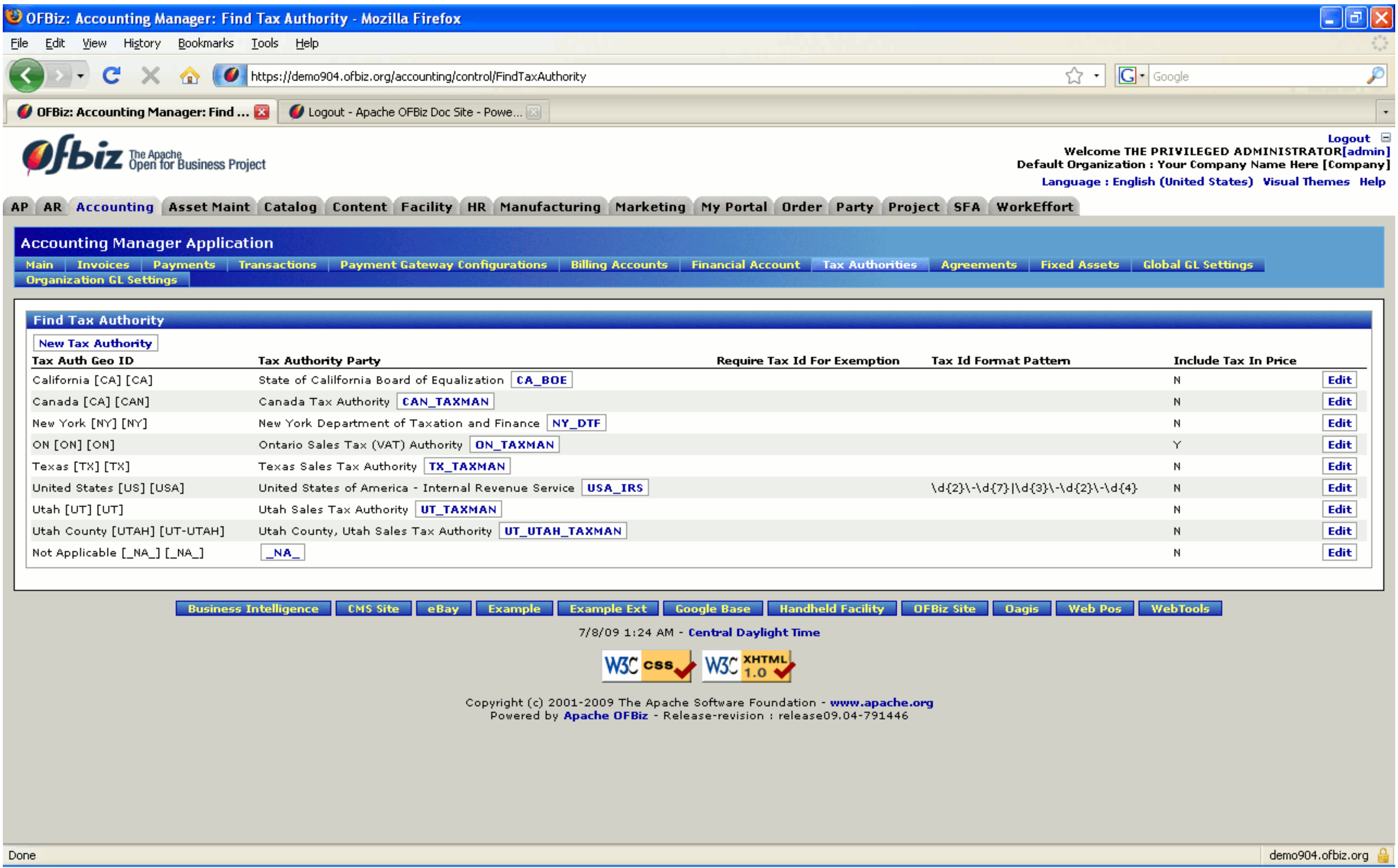
## What is it used for?

In OFBiz tax authorities are used to calculate where business or related taxes are due.
Tax setup is very important as it links into the calculated price that you can charge your customers and also flows through into any related legal documents that are generated (eg Sales Order, Sales Invoice, Purchase Order etc).
Each country or region will have specific rules regarding what should or should not be taxed. There will also be very strict regulations on how taxable transactions should be recorded and tracked in the general ledger or chart of accounts.
Tax authority setup allows configuration of the following :

- Income tax
- Value Added Tax (VAT) / Goods and Services Tax (GST)
- Import / Export tax /Custom and Excise Duty
- State, City or County taxes

## What's on the screen?

TO DO : Add a screen shot?




## How do I add a new tax authority?

IMPORTANT: You will need to create a party in Party Manager for the tax authority before you can add a new tax authority in the accounting / tax authorities screen.
Steps to create the party to be used for the tax authority are as follows:

- Create New Party Group
- Fill in basic details (eg name, address etc)
- Once the party record is created then add the role of 'Tax Authority' to the party

Only when the tax authority party record is created can you continue.
Example :To add a new tax authority

1. Press the 'New Tax Authority' button
2. The Edit Tax Authority screen is displayed
3. Select or enter the code for the country, state or region that is applicable for the 'Geo' field
4. Select or enter the party id of the Tax Authority party that has been created in Party Manager
5. Leave the 'Require Tax Id for Exemption' field at its default of 'Y' (NOTE TO CHECK: Am unsure of what this does....Does it not calculate tax if a Tax Id or VAT number for a customer is specified? Need to understand what functionality this is linked to)
6. Leave 'Tax Id Format Pattern' blank (NOTE TO CHECK: I think this specifies the format of the tax id so that it can be somehow validated)
7. Fill in the 'Include Tax in the price' - the default is 'N'. (NOTE: If prices need to include tax such as GST or VAT in the price then change this to 'Y')
8. Press the 'Update' button

NOTE: The above process creates the basic tax authority detail but there are further details that can be added via the other tax authority sub menus. There are six sub menus which make up the tax authority detail. These are as follows:

- Tax Authority (which is the default Edit Tax Authority screen)
- Categories
- Assocs (abbreviation for associations ?)
- GL Accounts
- Product Rates
- Parties

## How do I update a tax authority?

Example: To update an existing tax authority

1. Select the 'Edit' button next to the tax authority that you wish to update
2. The 'Edit Tax Authority' screen is displayed
3. Update the details of the tax authority as required including any submenus
4. Press the 'Update' button

## How do I delete / remove a tax authority?

Tax authorities cannot be deleted via the Tax Authority screens. If they need to be removed then it can be done via the Webtools and Entity Data maintenance.
NOTE: Be very careful removing tax authorities records unless you are completely certain that they have not been already used for transaction calculations.

Children Hide Children | View in hierarchy

08.1 Tax Authority (OFBiz End-User Documentation)
08.2 Categories (OFBiz End-User Documentation)
08.3 Assocs (OFBiz End-User Documentation)
08.4 GL Accounts (OFBiz End-User Documentation)
08.5 Product Rates (OFBiz End-User Documentation)
08.6 Parties (OFBiz End-User Documentation)

## 08.1 Tax Authority

### Definition: What is it?

The 'Edit Tax Authority' sub menu is the first of six sub menus used in the creation or update of a Tax Authority. On the creation or update of a Tax Authority it is the default screen that is displayed.

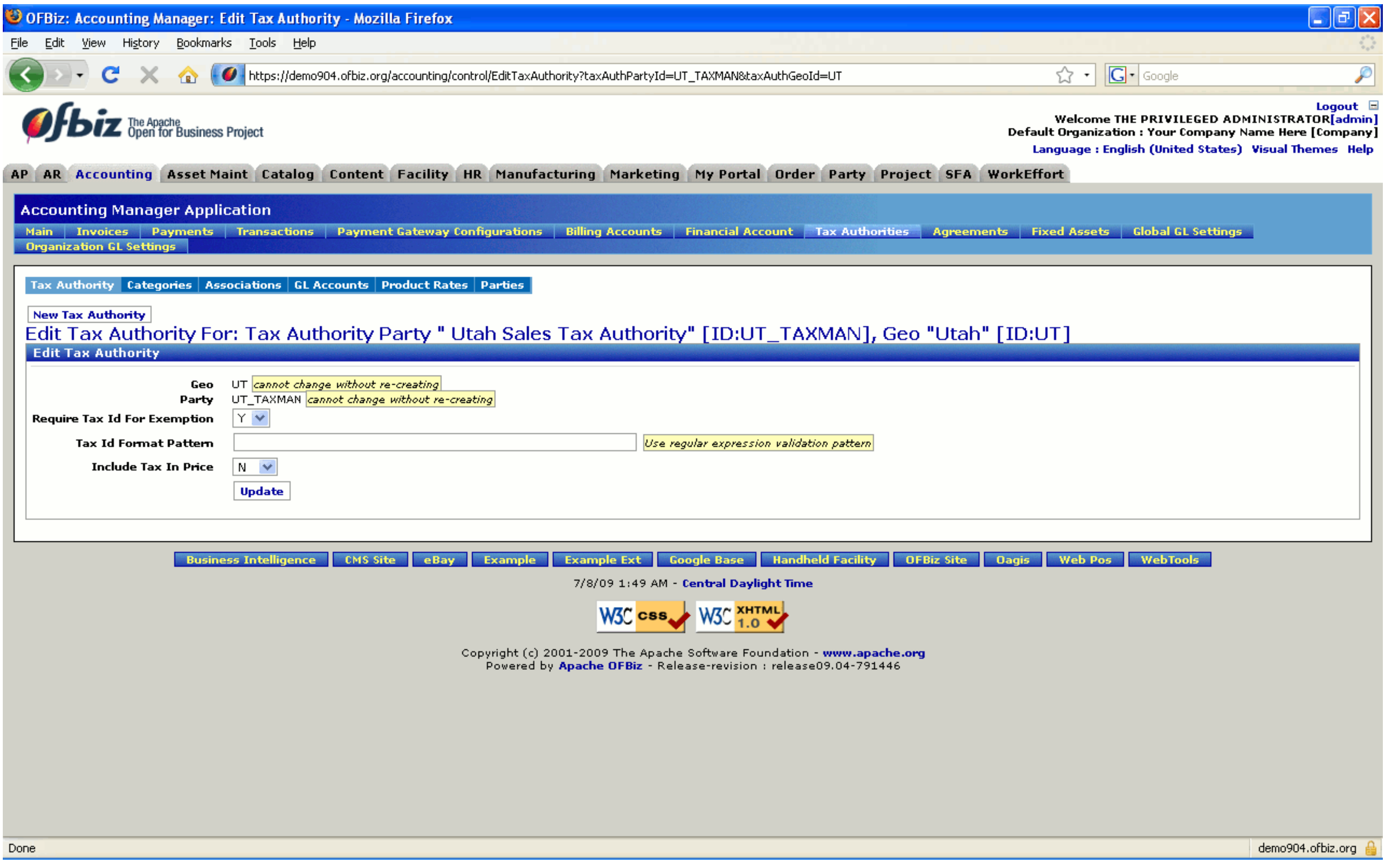
### What is it used for?

It can be used for updating the basic details of a Tax Authority such as:

- Changing whether a tax id or code is required for an exemption
- Modifying the tax id or code format
- Updating where or not to include the tax calculation as part of the product price

## What's on the screen?

TO DO



## How do I create a new Tax Authority?

IMPORTANT: You will need to create a party in Party Manager for the tax authority before you can add a new tax authority in the accounting / tax authorities screen.
Steps to create the party to be used for the tax authority are as follows:

- Create New Party Group
- Fill in basic details (eg name, address etc)
- Once the party record is created then add the role of 'Tax Authority' to the party

Only when the tax authority party record is created can you continue.
Example :To add a new tax authority

1. Press the 'New Tax Authority' button

2. The Edit Tax Authority screen is displayed
3. Select or enter the code for the country, state or region that is applicable for the 'Geo' field
4. Select or enter the party id of the Tax Authority party that has been created in Party Manager
5. Leave the 'Require Tax Id for Exemption' field at its default of 'Y' (NOTE TO CHECK: Am unsure of what this does....Does it not calculate tax if a Tax Id or VAT number for a customer is specified? Need to understand what functionality this is linked to)
6. Leave 'Tax Id Format Pattern' blank (NOTE TO CHECK: I think this specifies the format of the tax id so that it can be somehow validated)
7. Fill in the 'Include Tax in the price' - the default is 'N'. (NOTE: If prices need to include tax such as GST or VAT in the price then change this to 'Y')
8. Press the 'Update' button

## 08.2 Categories

### Definition: What is it ?

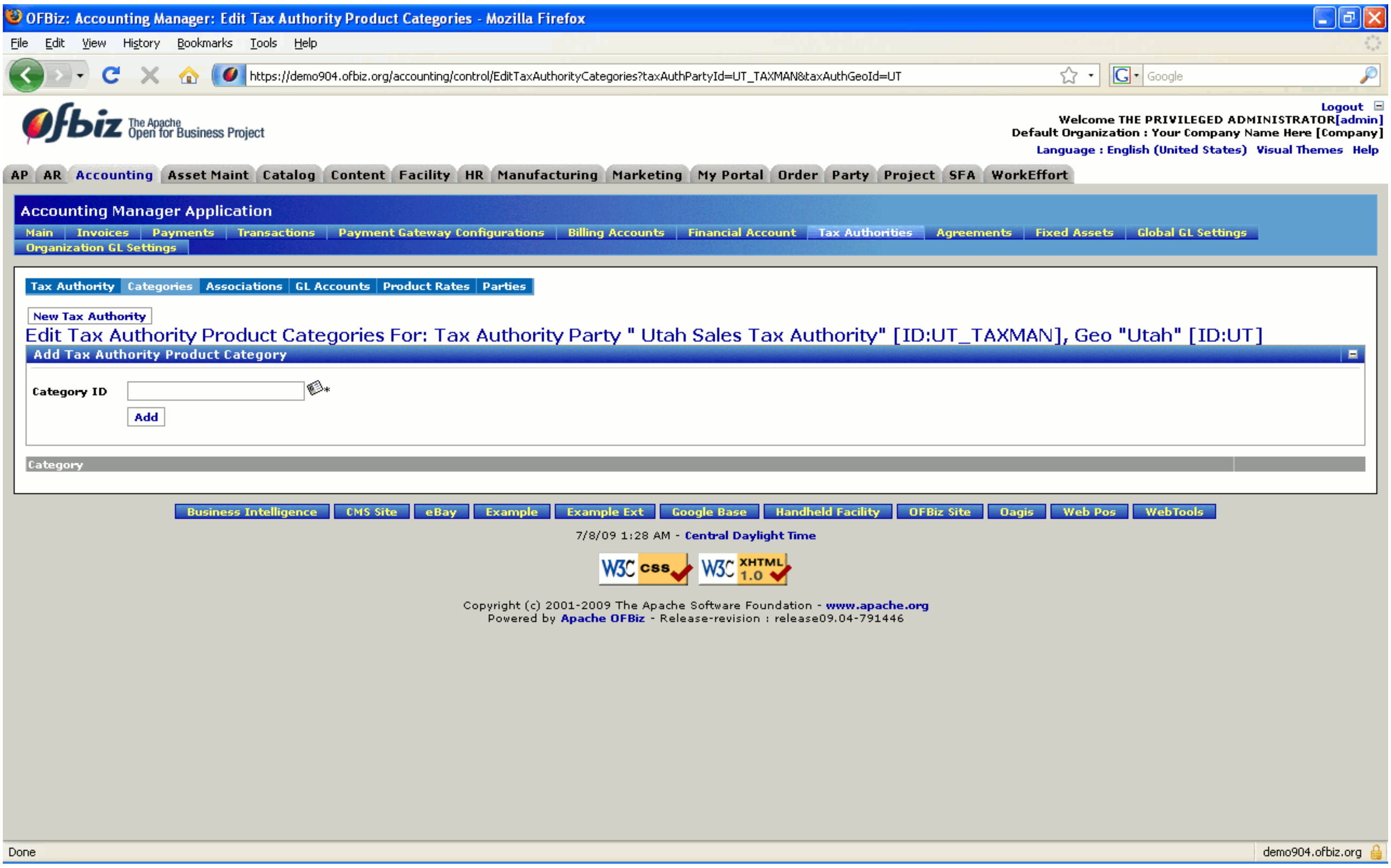
The Tax Authority Categories sub menu screen allows you link a tax authority to a specific product category.
NOTE TO CHECK: This means that the tax authority checks will be made against the specified category only. What happens if it is left blank...?

### What is it used for?

It can be used to add product categories to a tax authority. This means that all products in this category will be taxed at the rate specified for the tax authority.
An example of this could be separating products into categories for export to different countries. A separate tax authority will be associated with each category so that the specific tax rate for each of them will be applied.

## What's on the screen?

TO DO




## How do I add a new Tax Authority / Category mapping?

Example: To add a new Tax Authority / Category mapping

1. Enter or Lookup the 'Category Id' to be mapped
2. Press the 'Add' button
3. The new mapping will be displayed at the bottom of the screen

NOTE TO CHECK: Is there anywhere else this mapping can be added....???

### How do I update a Tax Authority / Category mapping?

A Tax Authority / Category mapping cannot be updated. If it needs to be changed then the entry must be deleted and then re-entered.

### How do I remove a Tax Authority / Category mapping?

Example: To remove a Tax Authority / Category mapping?

1. Locate the entry that needs to be removed
2. Press the 'Delete' button next to the entry

## 08.3 Assocs

### Definition: What is it ?

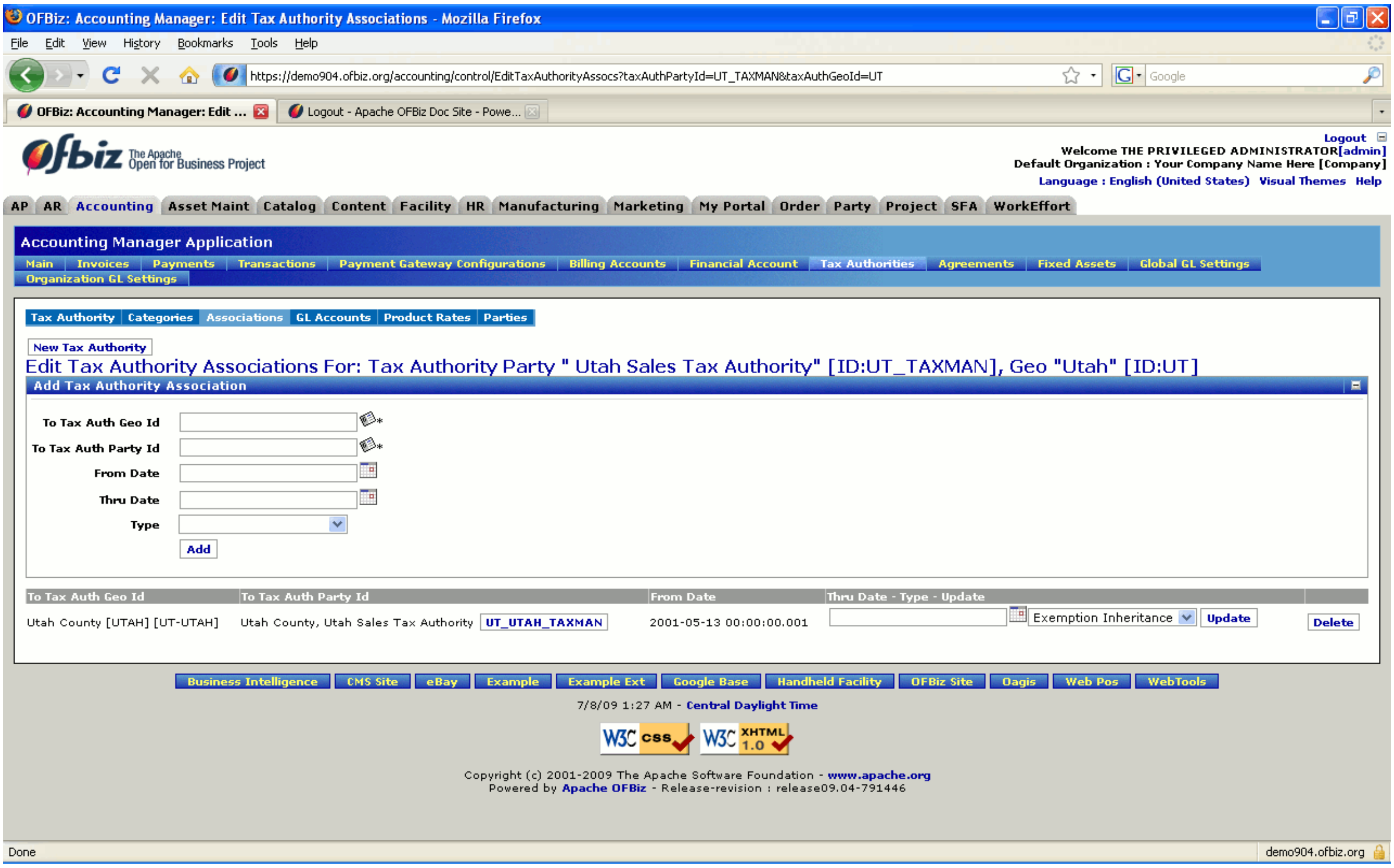
An association is a way of specifying how tax authorities can be linked to each other.

### What is it used for?

It can be used in the situation where the tax structure is hierarchical (eg city tax, plus county tax plus state tax).
NOTE: Not sure why this is any different from having separate tax authorities and not associating them. They can still all post the to same GL account....... Maybe it could be good for EU where each country tax authority is associated to the other (internal to EU + external to EU???)

# What's on the screen?

To do




# How do I add a new association for a Tax Authority?

# How do I update an association for a Tax Authority?

# How do I remove an association for a Tax Authority?

## 08.4 GL Accounts

### Definition: What is it ?

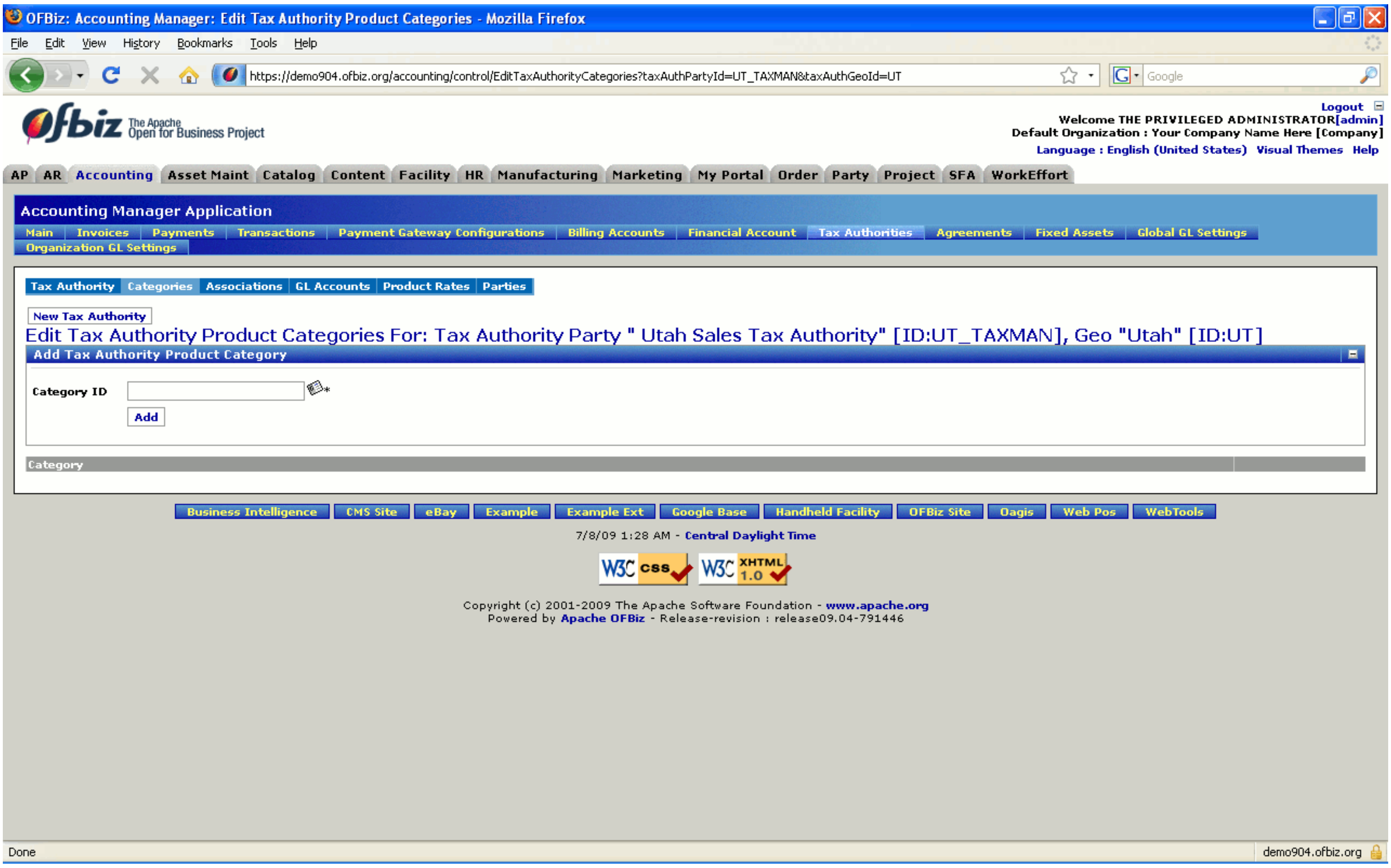
The GL Accounts sub menu screen allows you specify which general ledger account any tax calculated for this tax authority will be posted. This is done at at organisation level so the minimum requirement is that 'Company' is setup.

### What is it used for?

It is used to consolidate taxes for a specific tax authority into one general ledger account. It can be very useful if you need to track taxes for several tax authorities (eg different states or countries).

### What's on the screen?

To do



## How do I add a new general ledger account for a Tax Authority?

Example: To add a new general ledger account for a Tax Authority

1. Enter or use the lookup to select the 'Organisation Party Id' (NOTE: Normally this would be 'Company')
2. Enter or use the lookup to select the 'GL Account'
3. Press the 'Add' button

NOTE: The GL account used must have already been created in the Global GL Settings and linked to the chart of accounts for 'Company'
NOTE TO CHECK: Can there be only one entry here....???? Might be able to do several based on different organisations but same tax authority?

## How do I update a general ledger account for a Tax Authority?

The general ledger account can be updated by simply adding a new account to replace the existing entry.
Example: To update a general ledger account for a Tax Authority

1. Enter or use the lookup to select the 'Organisation Party Id' (NOTE: Normally this would be 'Company')
2. Enter or use the lookup to select the updated 'GL Account'
3. Press the 'Add' button
4. The existing entry will be replaced by the updated GL Account

NOTE: Be careful when updating a general ledger account because some transactions may have already been posted to the existing account.

## How do I delete a general ledger account for a Tax Authority?

Example: To delete a general ledger account for a Tax Authority

1. Locate the entry required
2. Press the 'Delete' button next to the entry that needs to be deleted
3. The entry is removed

# 08.5 Product Rates

## Definition: What is it?

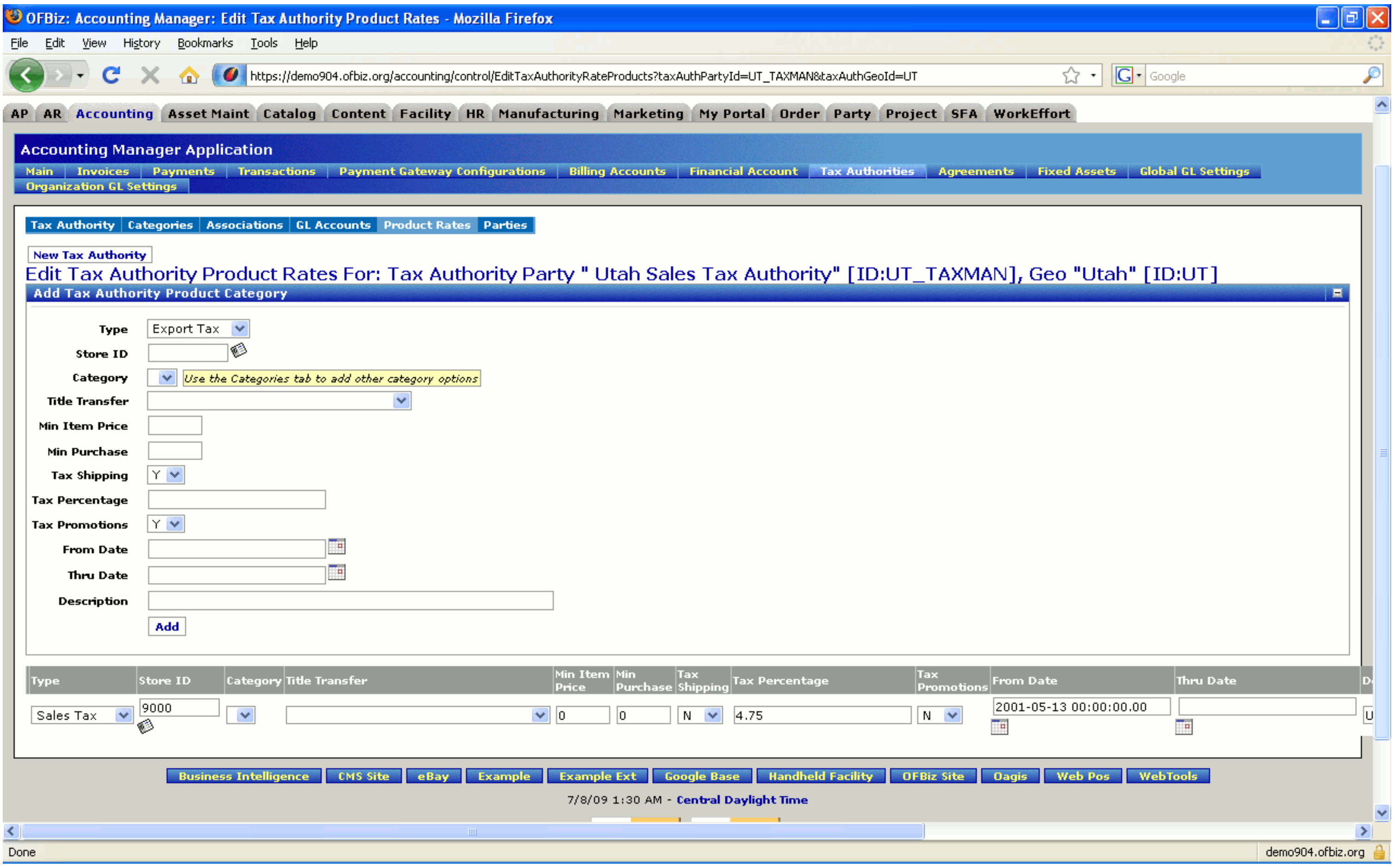
To do

## What is it used for?

To do

## What's on the screen?

To do



## How do I....?

# 08.6 Parties

## Definition: What is it?

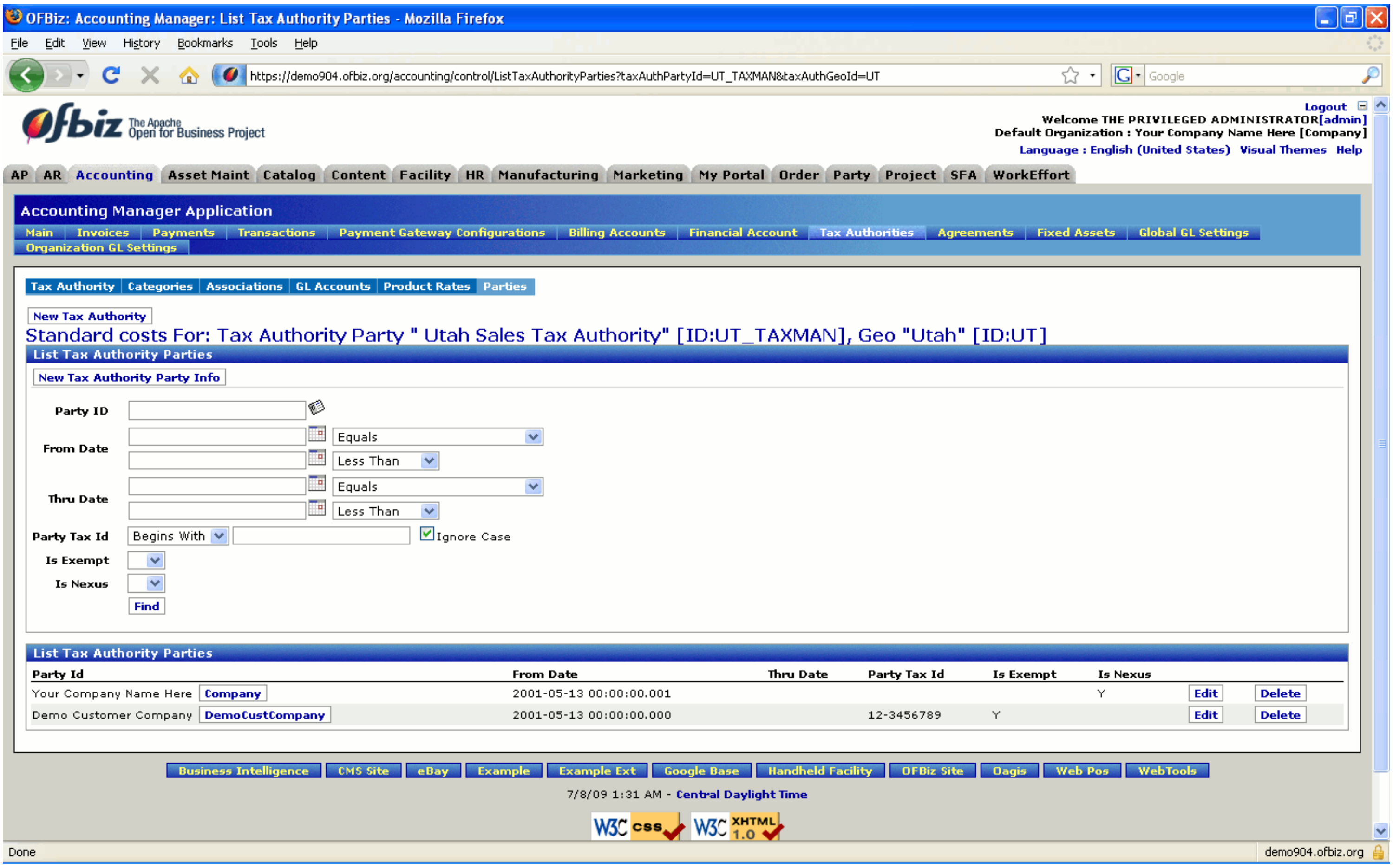
To do

## What is it used for?

To do

## What's on the screen?

To do



**How do I....?**

# 09 Agreements

## Definition: What is it?

An agreement is a way of recording a business arrangements or contract that your business makes with other companies or individuals. Common examples include Payment Terms (where you allow a customer up to 30 days to pay you) or Prompt Payment Discounts (where you offer a reduction on the amount owing if your customer pays you before a certain date).

## What is it used for?

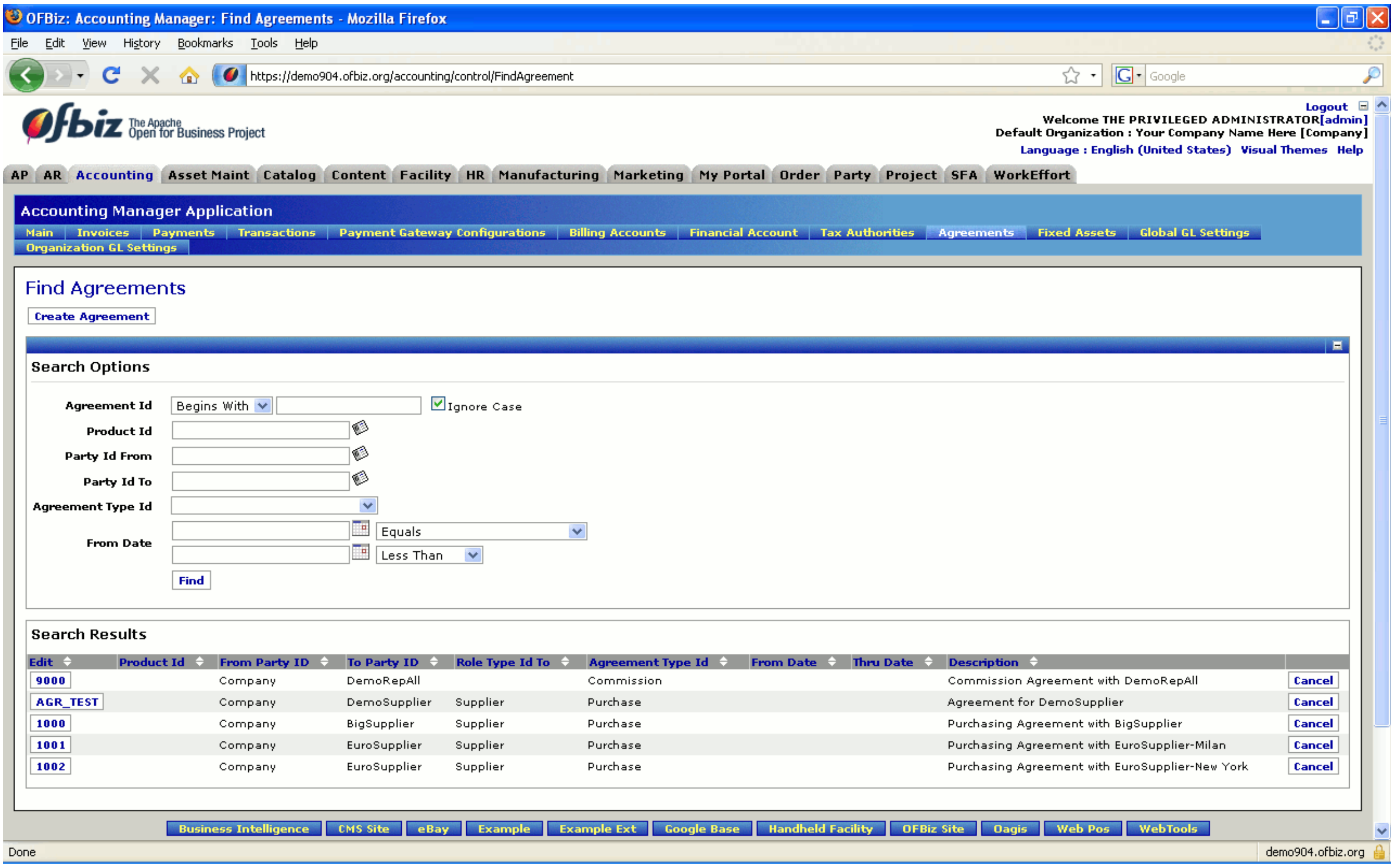
It can be used for the following:

- Defining Payment Terms for Customers or Suppliers
- Defining Sales Commissions
- Setting up Prompt Payment Discounts
- Setting up Price Lists (NOTE TO DO: Need to investigate how this logic overlaps with PRICE RULES in Catalog Manager)
- Defining Late Fee Penalties
- Defining preferred freight carriers or specific codes to be used

TO ADD MORE INFO HERE

## What's on the screen?

TO DO:



Children    Hide Children | View in hierarchy

09.1 Agreement (OFBiz End-User Documentation)

09.2 Agreement Terms (OFBiz End-User Documentation)

09.3 Agreement Items (OFBiz End-User Documentation)

09.4 Agreement Work Effort Appls (OFBiz End-User Documentation)

09.5 Agreement Roles (OFBiz End-User Documentation)

# 09.1 Agreement

## Definition: What is it?

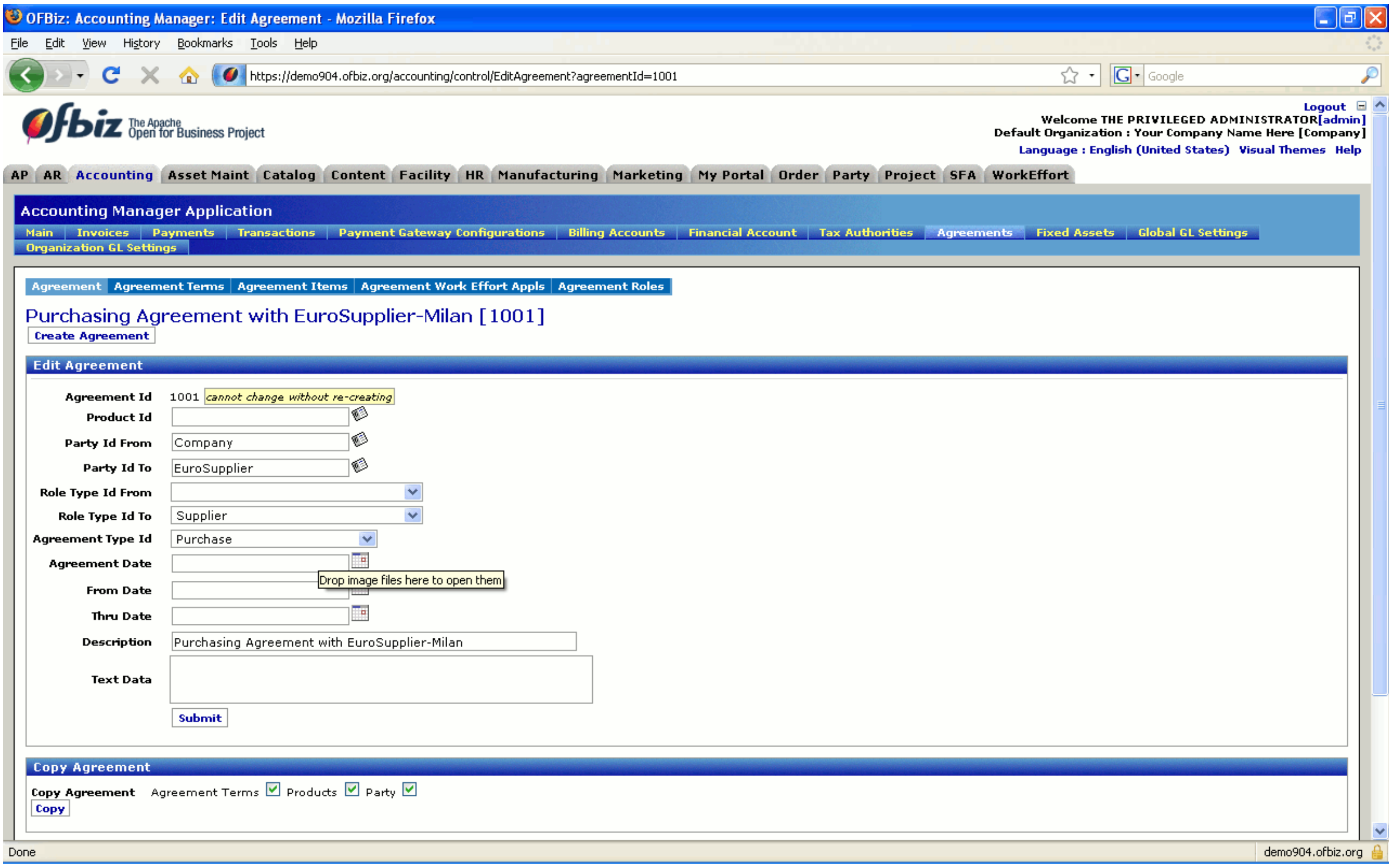
To do

## What is it used for?

To do

## What's on the screen?

To do




## How do I...?

# 10 Fixed Assets

## Definition: What is it?

Assets are items of value that are owned by the business. They are shown as Balance Sheet accounts. There are different type of assets - fixed, current, intangible. Examples of assets include furniture. computer equipment, bank accounts and goodwill.
Fixed Assets are assets that are generally not going to be converted to cash within a year so examples would be plant equipment or vehicles.
Fixed Assets are depreciated which means that a portion of the cost of the asset is written off over time. Depreciation is usually done annually but can be done more frequently.
Depreciation is also listed as part of the expenses on the Profit and Loss or Income Statement.
NOTE: Each country or region will have their own depreciation methods. Some of the more common ones are Straight Line, Diminishing Value. OFBiz demo data includes depreciation methods for Straight Line and Double Declining Balance.

## What is it used for?

TO DO:

## What's on the screen?

TO DO:

## Children (12)

Hide Children | View in Hierarchy

10.1 Fixed Asset
10.2 Children
10.3 Products
10.4 Calendar
10.5 Standard Costs
10.6 Identifications
10.7 Registrations
10.8 Meter Readings
10.9 Maintenances
10.10 Assignments
10.11 Depreciation
10.12 Geolocation

# 11 Global GL Settings

## Definition: What is this?

TO DO: add simple explanation

## What is it used for?

The Global GL Settings tab is where a limited global or 'master' accounting configuration can be done.
These include:

- Reviewing the chart of account structure or hierarchy (Navigate Accounts)
- Adding new accounts
- Updating an existing account (eg. change the description, change the type of account, change parent account or hierarchy)
- Linking an account from the master chart to 'Company' or any other of your company departments, sub departments or business units.
- Creating new component costs
- Setting defaults accounts for different types of payments
- Setting default accounts for invoices line items (Note : This includes all types eg commission, purchase, return, sales, etc)

NOTE: Some of the configuration specified here can be over-ridden using the General Ledger tab.

## What's on the screen?

TO DO:

Children Hide Children | View in hierarchy

11.1 Chart of Accounts (OFBiz End-User Documentation)
11.2 Edit Custom Time Periods (OFBiz End-User Documentation)
11.3 Costs (OFBiz End-User Documentation)
11.4 Payment Method Type (OFBiz End-User Documentation)
11.5 Invoice Item Type (OFBiz End-User Documentation)
11.6 Rates (OFBiz End-User Documentation)

## 11.1 Chart of Accounts

### Definition: What is it?

If the demo data has been loaded then the default screen displays a list of the general ledger accounts that form the Global Chart of Accounts template. All general ledger accounts must exist in the global template before it can be assigned to the be used at the organisation level (eg Company).

### What is it used for?

It is used to view or edit the details of the general ledger accounts in the global template. There are also options to print or export the details.

### What's on the screen?

### How do I...?

Children Hide Children | View in hierarchy
11.1.1 Navigate Accounts (OFBiz End-User Documentation)
11.1.2 Assign GL Account (OFBiz End-User Documentation)

## 11.1.1 Navigate Accounts

### Definition: What is it?

This screen is split into two areas one for navigating the general ledger accounts in the global template and the other for adding or editing the details of an account.

## What is it used for?

It can be used as follows:

- To locate a particular account
- To view the chart of account structure or hierarchy
- To update the details of an existing account
- To add a new account to the chart of accounts template

When adding or creating an account it is important to understand the uses of the fields used in the chart of accounts hierarchy. The following table tries to define these. (NOTE: A lot are still under investigation and being tested)

| Field Name | Description / Uses |
|---|---|
| GL Account Id | A unique identifier used to identify the account. If using the demo data template then keep new accounts using the same structure |
| GL Account Type Id | TO CHECK: This appears to be a way of translating a business transaction into an accounting transaction. Need to investigate why there is duplication between this and the GL Account Class Id (eg Current Liability, Current Asset, etc).<br>In 'Organisation GL Settings / Setup / GL Account Type Defaults' it is the GL Account Type Id that is used to specify which GL account that that type of transaction will post to (eg Accounts Payable, Accounts Receivable etc). When a payment is created, then based on the type of payment made eg 'Customer Deposit' then it will translate back to a GL Account Type Id which in turn will translate to an actual GL account.<br>That could mean that the transactions in a particular GL account that get automatically posted would have the same GL Account Type Id as the GL account itself....??? |
| GL Account Class Id | TO CHECK: This appears to be a classification system and hierarchy for reporting purposes. The list contains details at multiple levels (eg Income ie the parent but also Cash Income and Non Cash Income) Need to check if this is already used to produce any of the existing reports |
| GL Resource Type Id | TO CHECK: Unsure of how this is used. Appears to be a way of specifying what type of account it is (eg Services, labour, Finished Goods etc) - Need to do more investigation and testing |
| GL Xbrl Class Id | TO CHECK: Is this just the Accounting Standards to be used eg US GAAP or IAS ?.... |
| Parent GL Account Id | The GL Account Id of an account that is the parent (or next level up in the chart hierarchy) |

| | |
|---|---|
| Account Code | TO CHECK: This is the same as the GL Account Code. Need to investigate why....??? |
| Account Name | The name or description of the account (eg SALES INCOME) |
| Description | A further or long description of the account or the details that it will contain |
| Product Id | TO CHECK: Is this for specifying that only details from a specific product can be posted to this account? To be investigated.... |
| Posted Balance | TO CHECK: For the Global Template this is zero. Is there a situation where this is not zero....???? |

### What's on the screen?

#### How do I....

# 12 Organization GL Settings

## Definition: What is it?

The Organization GL settings sub menu allows the user to create configuration settings to be especially associated with parties that have the role type 'Internal Organization'. These configuration involves settings such as invoice numbering or sequencing, fiscal year start date and the default refund payment method.

## What is it used for?

TO DO: add in paragraph here

## What's on the screen?

The default screen shows a list of Party Groups that have the role of 'Internal Organization' associated with them. If you have installed the demo data then the default company 'Company' as well as departments such as 'ACCOUNTING', 'SALES', 'DEV', 'MARKETING' and 'TESTING' will be displayed.
For each of these entries you will have the ability to modify their individual configuration (using 'Setup') or viewing accounting transactions and reports (using 'Accounting').

Children   Hide Children | View in hierarchy

- 12.1 Setup (OFBiz End-User Documentation)
- 12.2 Accounting (OFBiz End-User Documentation)

# 12.1 Setup

## Definition: What is it?

The setup link allows access to the main configuration setup for accounting. The default screen is 'Accounting Preferences'

## What is it used for?

See details for Accounting Preferences

## What's on the screen?

See details for Accounting Preferences
Children   Hide Children | View in hierarchy

- 12.1.1 Accounting Preferences (OFBiz End-User Documentation)
- 12.1.2 Chart of Accounts (OFBiz End-User Documentation)
- 12.1.3 Journals (OFBiz End-User Documentation)
- 12.1.4 GL Account Defaults (OFBiz End-User Documentation)
- 12.1.5 Time Period (OFBiz End-User Documentation)
- 12.1.6 Foreign Exchange Rates (OFBiz End-User Documentation)

### 12.1.1 Accounting Preferences

#### Definition: What is it?

Accounting Preferences are a set of configuration details that are related to a party. To appear on this screen the party must be setup with the role of 'Internal Organisation'. This means that you can add the internal organisation role to a party and they will be added to this screen and then can be configured.
The master default party is 'Company' but preferences can also be setup for internal departments. The demo data shows some examples of this (eg Marketing, Accounting, Sales, Development etc). Unless overridden then then all other parties appearing on this screen will take their default setup from 'Company'
NOTE: The majority of the configuration information displayed in Accounting Preferences are taken from the Enumeration entity.

#### What is it used for?

It is used for setting specifying information related to the accounting setup for a specific organisation or parties that exist within an organisation such as business units, cost centres, departments ,subsidiaries etc.
Information that can be setup include the following:

- The start date of the Time Periods and Fiscal or Accounting Year (eg 1st April, 1st January, 1st June etc)
- Tax Return Form (NOTE: Need to check how important this is and where it is used.......possibly some kind of reporting???)
- The method to be used for calculating Cost of Goods Sold (COGS)
- Base Currency - eg USD, GBP, EUR etc (NOTE: May have main company in USD but a subsidiary in EUR etc.....???)
- Invoice prefix, numbering and sequencing (eg you may want each business unit / subsidiary to have its own invoice numbering or sequence etc)
- Quote prefix, number and sequencing
- Method to be used for refunds (eg cheque, direct bank credit, voucher credit etc...)
- Specify which journal will be used to store error transactions

NOTE: Key things that are usually need to be amended include the base currency for the company, fiscal year information and invoice numbering prefix or sequencing
NOTE TO CHECK: Sales Order numbering is controlled in Store setup - is there any other cross over where configuration info exists in other modules.....????

## What's on the screen?

TO DO

## How do I create or setup a new Accounting Preference?

IMPORTANT NOTE: A party must be setup with the role of 'Internal Organisation' before it will appear on the Accounting Preference screen so that it can be setup. Once this has been done then

Example : To create a new Accounting Preference

1. Select the 'Setup' button next to the party to be setup
2. The Accounting Preferences screen is displayed. (IMPORTANT: The first time this screen is displayed all of the fields will be modifiable. Once this has been saved only certain fields will be modifiable!!)
3. The default entries will be based on (or inherited from) 'Company'
4. Enter any changes that are required (eg Invoice Prefix, Error Journal name - as you may want error transactions from separate departments to be handled differently...)
5. Press the 'Add' button

NOTE TO CHECK: If invoices have already been generated then you may not be able to change the 'Last Invoice Number' field of any new Accounting Preference......????

## How do I update an Accounting Preference?

Example: To update an Accounting Preference

1. Select the 'Setup' button next to the party to be setup
2. The Accounting Preferences screen is displayed but only certain fields will be modifiable
3. Enter any changes required
4. Press the 'Update' button

NOTE: If you need to change any of the fields that are not modifiable then it can be done via the Entity Data Maintenance on Webtools menu using the PartyAcctgPreference entity. You will need to be careful in editing an existing preference especially if the configuration already been used for transactions.

### How to I delete an Accounting Preference?

There is currently no delete option via the user interface but an Accounting Preference can be removed by deleting the role of 'Internal Organisation' from the party record.
NOTE TO CHECK: Need to investigate the impact of using an accounting preference then removing it. What happens to the transactions in process etc......???

## 12.1.2 Chart of Accounts

### Definition: What is it?

OFBiz comes with a master template for a very comprehensive chart of accounts. This can be found in 'Global GL Defaults' under the 'Accounting' tab.
A couple of points to note

- you do not need to use all the accounts defined in this master template (but it may be simpler to look for the accounts that you can use or rename)
- you can create your own additional accounts if you dont want to use the ones in the master template

The chart of accounts for the default organisation (Company) is built up by selecting the accounts that you want to use from the global chart of accounts master template. This means that if you want to create a new account then you need to create it first in the Global Chart of Accounts and then link (or assign) it to the chart of accounts for Company.
IMPORTANT NOTE: You need to be careful if you do decide to create your own accounts that they contain all the details required and that they are linked into the relevant configuation for the setup of the GL defaults. This means that if you change an account (eg Inventory) to one of your own - you need to check the GL defaults setup and replace any reference to the Inventory account to the one you have created.

### What is it used for?

This Chart of Accounts screen is used to define the list of accounts (or chart) that will be actively used by the company.For example the Global chart of accounts may contain 100 different accounts but only 20 need to be used for your specific business. This means the you need only to create assignments to the accounts that you actively want to use.
The Chart of Accounts is a mixture of business needs (ie being able to track the information you need for your business) and tax requirements (ie legal or government requirements necessary for operating a business).  The type of Chart that you setup will be dependent of your business type.

## What's on the screen?

TO DO

## How do I create a Chart of Accounts?

As mentioned above the chart of accounts for the default organisation (Company) is built up by selecting the accounts that you want to use from the global chart of accounts master template. This means that if you want to create a new account then you need to create it first in the Global Chart of Accounts and then link (or assign) it to the chart of accounts for Company. By creating an assignment to an account it is then added to the Chart of Accounts.
Example: To add an account to the Chart of Accounts

1. Select the account Gl Account Id that you need from the drop down box
2. Press the 'Create Assignment' button
3. The account is added to the Chart of Account

## How do I update a Chart of Accounts?

Updating the Chart of Accounts will involve either creating a new assignment or removing an existing one. A new assignment is created using the instructions above. The added complication may be that the account that you need does not exist in the Global Chart of Accounts. As mentioned above it will need to be created and then linked.
See the instructions below to remove an existing account assignment.
NOTE: If a completely new account is required that does not already exist as part of the Global Chart of Accounts template then it will need to be created as part of the Global template first before it can be used as an assignment in the Organisation Chart of Accounts.

## How do I delete a Chart of Accounts?

Accounts are not deleted from the Chart of Accounts - they are simply no longer selected to be used.
It is important that you do not remove accounts that are active and have already been used for transactions. Even if the net balance of the account is zero then from an audit perspective then you should not be removing accounts.
You should only be looking to remove accounts that have not been used. To un-link or un-assign accounts from the default company then use the Entity Data Maintenance from the Webtools menu. Look for the entity 'GlAccountOrganization' and delete the record to remove the link.

### How do I update the details for an account in the Chart of Accounts?

Details of the accounts that make up the Chart of Accounts can be accessed from this screen. NOTE: There is a bug here related to the 'Posted Balance' because the GL account link takes the user back to the 'Global GL Settings' where all posted balances are zero. The posted balance for the account is stored in the entity 'GlAccountOrganization' but this is not the detail that is displayed on the screen. The screen details are taken from the 'GlAccount' entity and this always seems to have a posted balance field which is zero.
Example: To view the details of an account

1. Click on the 'GL Account Id' of the account required
2. The 'Edit GL Account' screen is displayed showing the details of the account selected (NOTE:This screen is also accessible via 'Global GL Settings / Chart of Account / Navigate Accounts '
3. Amend the fields required (NOTE: The GL Account Id and Posted Balance fields cannot be amended)
4. Press the 'Update' button

## 12.1.3 Journals

### Definition: What is it?

A journal is a detailed accounting transaction that is recorded (or posted) to the General Ledger. It is made up of a debit and a credit component. (IMPORTANT NOTE TO CHECK: Is this screen really about Journals or is it about Suspense Accounts.....??????)
NOTE: By default in OFBIZ a journal called 'ERROR_JOURNAL' is created as part of the demo data installation. This 'ERROR_JOURNAL' is referenced in the Accounting Preferences setup for Company.

### What is it used for?

The 'ERROR_JOURNAL' is used to store details of any transaction that fails and cannot be posted to a general ledger account.
Transactions falling into error can be as the result of incomplete setup or an invalid transaction (eg a transaction that should never occur).
TO CHECK: Other uses for journals???

### What's on the screen?

TO DO: Include a screen shot??

### How do I create a journal?

Example: To create a journal

1. Enter a journal name in the Gl Journal Name field (eg MY_JOURNAL)
2. Press the 'Submit' button
3. The journal is created and will appear in the journal list at the bottom of the screen (Note that the Journal ID is automatically generated)

### How do I update a journal?

Example: To update a journal

1. Select the journal to be updated from the list of journals at the bottom of the screen
2. The journal details will be displayed on the screen
3. Update the Gl Journal Name (as this is currently the only field that can be updated)
4. Press the 'Submit' button
5. The updated journal will appear in the journal list at the bottom of the screen

### How do I delete a journal?

Be careful if you need to remove an existing journal as it may have transactions associated with it. (NOTE TO CHECK: What happens to the transactions in a journal if the journal is deleted? Also can a journal be deleted if it contains transactions.....)
Example: To delete / remove a journal

1. Press the 'Remove' button next to the journal that you want to delete
2. The journal is deleted and the screen is redisplayed

## 12.1.4 GL Account Defaults

### Definition: What is it?

The GL Account Defaults screens are are method to setup rules that are used to translate business transactions into accounting transactions. It currently is made up of 12 sub menus that can be used to map various transaction type codes to a specific general ledger account. These are as follows:

- GL Account Type defaults
- Product GL Accounts
- Product Category GL Accounts
- FinAccount Type / GL Account (for Financial Accounts)
- Sales Invoice (NOTE: The tax mappings are not used here. Tax setup is done via Tax Authorities)
- Purchase Invoice (NOTE: The tax mappings are not used here. Tax setup is done via Tax Authorities)

- Payment Type / GL Account Type Id
- Payment Method Id / GL Account Id
- Variance Reason GL Accounts
- Credit Card Type GL Accounts
- Tax Authority GL Accounts
- Party GL Accounts

## What is it used for?

Accounting transactions are made up of a Debit Entry and a Credit Entry. The GL Account defaults screens help map which accounts are to be used to generate a each part of the transaction. This means that certain mappings will be used to generate the Debit (or DR) entry part of the transaction and others used to generate the Credit (or CR) entry part of the transaction. Some examples will be given for each of the GL Account defaults to show what transactions are affected by the mappings.
NOTE: Many of the accounting transactions are generated 'automatically' (or in the background) using the the accounting services SECAS / EECAS. (to check....)

## What's on the screen?

TO DO

Children Hide Children | View in hierarchy

12.1.4.1 GL Account Type Defaults (OFBiz End-User Documentation)
12.1.4.10 Credit Card Type GL Account (OFBiz End-User Documentation)
12.1.4.11 Tax Authority GL Accounts (OFBiz End-User Documentation)
12.1.4.12 Party GL Accounts (OFBiz End-User Documentation)
12.1.4.2 Product GL Accounts (OFBiz End-User Documentation)
12.1.4.3 Product Category GL Account (OFBiz End-User Documentation)
12.1.4.4 FinAccount Type - GL Account (OFBiz End-User Documentation)
12.1.4.5 Sales Invoice (OFBiz End-User Documentation)
12.1.4.6 Purchase Invoice (OFBiz End-User Documentation)
12.1.4.7 Payment Type - GL Account Type Id (OFBiz End-User Documentation)
12.1.4.8 Payment Method Id - Gl Account Id (OFBiz End-User Documentation)
12.1.4.9 Variance Reason GL Accounts (OFBiz End-User Documentation)

### 12.1.4.1 GL Account Type Defaults

**Definition: What is it?**

The GL Account Type is used to specify the default account that certain transactions (eg Accounts Payable, Accounts Receivable, etc) are posted to. An accounting transaction (or journal entry) is made up of two parts - a Debit Entry and a Credit Entry that balance each other. The GL Account Type is used to translate one side of the journal entry.

GL Account Types are stored in Entity GLAccountType which can be viewed via Entity Data Maintenance in the Webtools menu. There are currently 57 different GL Account Types that are part of the OFBiz demo data but only 19 of these are setup as mappings. These are as follows:

| GL Account Type | General Ledger Account | Notes / Comments |
|---|---|---|
| Accounts Payable | 210000 ACCOUNTS PAYABLE | |
| Accounts Receivable | 120000 ACCOUNTS RECEIVABLE | |
| Cost of Goods Sold | 500000 COST OF GOODS SOLD | |
| Commission Payables | 221100 ACCRUED COMMISSIONS DUE | |
| Customer Credits | 213000 CUSTOMER CREDITS | Used for Refunds ???? |
| Customer Deposits | 213300 SPECIAL ORDER DEPOSITS | Used for Financial Accounts....???? |
| Interest Income Receivables | 121800 ACCOUNTS RECEIVABLE TRADE - INTEREST RECEIVABLE | |
| Inventory | 140000 INVENTORY | |
| Payable from Inventory Transferred In | 215000 PAYABLE FOR INVENTORY TRANSFERRED IN | |
| Receivables from Inventory Transferred Out | 125000 RECEIVABLE FROM INVENTORY TRANSFERRED OUT | |
| Inventory Item Value Adjustment | 515000 WRITE DOWNS BELOW COST | |
| Operating Expense | 600000 EXPENSE | |
| Prepaid Expenses | 150000 PREPAID EXPENSES, DEPOSITS, OTHER CURRENT ASSETS | |

| | | |
|---|---|---|
| Raw Materials Inventory | 141000 RAW MATERIALS INVENTORY | |
| Retained Earnings | 336000 RETAINED EARNINGS | Used when when you close a financial period - even monthly ones! |
| Sales | 400000 SALES | |
| Tax | 900000 INCOME TAX | Mmmmm....??? |
| Uninvoiced Shipment Receipts | 214000 UNINVOICED ITEM RECEIPTS | Used on Purchase Order transactions |
| Work in Progress Inventory | 142000 WORK IN PROGRESS INVENTORY | |

NOTE: Maybe change this to a table with current mappings and notes / comments

### What is it used for?

How the GL Account Type is used is best shown by an example.
A very simple description of an online Sales Order Process could be as follows:

1. Customer Orders a Product (and Creates a Sales Order)
2. Customer Pays for Product (via Credit Card, Internet Banking etc)
3. Vendor confirms Payment and Dispatches the Product to the Customer

Let's focus on the first part step of 3 in more detail.

- The vendor has checked their bank statement and seen that the customer has paid
- In OFBiz Order Manager they will then look up the relevant Sales Order and then click the 'Receive Payment' button to log the payment in the system

- The 'Receive Payment' button is a trigger for 'automatic' an accounting transaction
- The transaction type that is triggered is called 'Incoming Payment'

| Transaction Type | Triggered By | Accounting Entries Generated | Comments |
|---|---|---|---|
| Incoming Payment | Receive Payment | DR 112000 Undeposited Funds<br>CR 120000 Accounts Receivable | If a customer pays before the goods are shipped (as in the normal e-commerce process) then this should not be booked to Accounts Receivable but a customer prepayment or deposit account |

The CR (or Credit) entry for the transaction is created by the GL Acccount Type mapping for 'Accounts Receivable' (which by using the demo data default will go the 120000 Accounts Receivable)
The DR (or Debit) entry for the transaction is created by a different GL Account default, the Payment Method Id / GL Account Id mapping (eg Cash is setup as 112000 Undeposited Receipts)

### What's on the screen?

TO DO

#### How do I create a new GL Account Type default mapping?

There are currently 57 different GL Account Types that come as part of the demo data with OFBiz. This should be enough to manage the vast majority of business transactions. These instructions show how to add a mapping using the default data.
Example: To add a GL Account Type mapping

1. Select the GL Account Type Id from the drop down list
2. Select the GL Account to map it to from the drop down list
3. Press the 'Save' button
4. The new GL Account Type mapping is displayed in the list at the bottom of the screen

NOTE: If none of the demo data GL Account Types are sufficient then new ones can be added using Entity Data Maintenance and the entity 'GLAccountType' in the Webtools menu.

#### How do I update a GL Account Type default mapping?

A GL Account Type mapping cannot be updated directly but needs to be removed then re-created. If you try to update an existing entry you will get an 'duplicate key' error message.
Example: To update a GL Account Type

1. Press the 'Remove' button next to the entry that you want to update
2. The entry is removed from the list of entries displayed
3. Select the GL Account Type Id from the drop down list
4. Select the updated GL Account to map it to from the drop down list
5. Press the 'Save' button
6. The new GL Account mapping is displayed in the list at the bottom of the screen

#### How do I delete a GL Account Type default mapping?

Example: To remove a GL Account Type mapping

1. Press the 'Remove' button next to the entry that you want to delete
2. The entry is removed from the list of entries displayed

### 12.1.4.2 Product GL Accounts

#### Definition: What is it?

The Product GL Account is used to specify the default account to be used for a specific Product' and 'Account Type' combination. This setup will translate to one side of the journal entry only.

NOTE: Duplicate functionality .... This setup for the Product GL Account can also be setup using the 'Accounts' sub menu for the Product in Catalog Manager.

NOTE TO CHECK: Confirm whether this defaults work like a hierarchy....eg Product GL Defaults will override General Account defaults.

#### What is it used for?

It is used for tracking product transactions at a more detailed level.

Examples could be as follows:

- Tracking Accounts Receivable by Product in the General Ledger
- Tracking Cost of Goods by product (or product variation) in the General Ledger
- Tracking Commissions paid by Product in the General Ledger

#### What's on the screen?

TO DO

#### How do I add a new Product / GL Account Type mapping?

By default there are no Product / GL Account Type mappings that are configured as part of the OFBiz demo data.

Example: To add a Product / GL Account Type mapping

1. Select the 'Account Type' from the drop down list (NOTE: In other screens this field is call the 'GL Account Type Id'.....)
2. Select the ' GL Account' to map it to from the drop down list
3. Enter or look up the Product Id to be used
4. Press the 'Add' button
5. The new mapping will be displayed in the list at the bottom of the screen

NOTE: This mapping can also be also be done via the 'Accounts' sub menu for the Product. Any mapping created here will be displayed under the Product 'Accounts' sub menu. Alternatively any mapping created in the Product 'Accounts' sub menu will also be displayed here.

#### How do I update a Product / GL Account Type mapping?

A Product / GL Account Type mapping can be updated by modifying the GL Account only. If the product needs to be updated then the mapping will need to be deleted and then re-entered using the new product.

Example: To update a Product / GL Account Type mapping

1. Locate the entry that needs to be updated in the list of Product / GL Account Type mappings
2. Modify the 'GL Account 'by using the drop down list next to the GL Account field
3. Press the 'Update' button
4. The updated mapping will be displayed

#### How do I delete a Product / GL Account Type mapping?

Example: To delete a Product / GL Account Type mapping

1. Locate the entry that needs to be deleted in the list of Product / GL Account Type mappings
2. Press the 'Remove' button next to the entry

NOTE: This can also be done via the 'Accounts' sub menu for the Product using the 'Delete Link' button.

### 12.1.4.3 Product Category GL Account

#### Definition: What is it?

The Product Category GL Account is used to specify the default account to be used for a specific 'Product Category' and 'Account Type' combination. This setup will translate to one side of the journal entry only.
NOTE TO CHECK: Confirm whether this defaults work like a hierarchy....eg Product Category GL Defaults will override General Account defaults.

#### What is it used for?

It is used for tracking product category transactions at a more detailed level.
Examples could be as follows:

- Tracking Accounts Receivable by Product Category in the General Ledger
- Tracking Cost of Goods by product category in the General Ledger
- Tracking Commissions paid by Product Category in the General Ledger

The demo data gives an idea of the use of product categories to classify or separate different products streams. If specific accounting or management reporting is required at this level then the General Ledger can be setup to provide this detail.

#### What's on the screen?

To do

#### How do I add a new Product Category / GL Account Type mapping?

By default there are no Product Category / GL Account Type mappings that are configured as part of the OFBiz demo data.
Example: To add a Product Category / GL Account Type mapping

1. Select the 'Account Type' from the drop down list (NOTE: In other screens this field is call the 'GL Account Type Id'.....)
2. Select the ' GL Account' to map it to from the drop down list
3. Enter or look up the Product Category Id to be used
4. Press the 'Add' button
5. The new mapping will be displayed in the list at the bottom of the screen

NOTE TO CHECK: Can this mapping be done from anywhere else? ...eg Catalog Manager ?

#### How do I update a Product Category / GL Account type mapping?

A Product Category / GL Account Type mapping can be updated by modifying the GL Account only. If the product category or the Account Type needs to be updated then the mapping will need to be deleted and then re-entered using the new product category or Account Type.
Example: To update a Product Category / GL Account Type mapping

1. Locate the entry that needs to be updated in the list of Product Category / GL Account Type mappings
2. Modify the 'GL Account 'by using the drop down list next to the GL Account field
3. Press the 'Update' button
4. The updated mapping will be displayed

#### How do I remove a Product Category / GL Account Type mapping?

Example: To delete a Product Category / GL Account Type mapping

1. Locate the entry that needs to be deleted in the list of Product Category / GL Account Type mappings
2. Press the 'Remove' button next to the entry

### 12.1.4.4 FinAccount Type - GL Account

#### Definition: What is it?

The FinAccount Type GL Account (Financial Account Type / GL Account Type) is used to specify the default account to be used for a specific type of Financial Account. This setup will translate to one side of the journal entry only.
NOTE: There is a limitation that only one account can be specified per Financial Account type. Currently there are 6 types of Financial Account (Bank, Deposit, Investment, Gift Certificate, Replenish, Service Credit) - so if you have more than one of these type of accounts that you need to track separately then there could be a problem.

## What is it used for?

This mapping is normally be triggered if something is paid or uses a Financial Account. Using the demo data this mapping is triggered when someone purchases a gift certificate, or pays money into a financial account.
NOTE TO ADD: Do a more detailed example with the General Ledger transactions showing where this mapping is used.

## What's on the screen?

TO DO

### How do I add a new Financial Account Type / GL Account mapping?

By default there are 4 Financial Account Type / GL Type mappings that are configured as part of the OFBiz demo data.
Example: To add a Financial Account Type / GL Account Type mapping

1. Select the 'FinAccount Type Id' from the drop down list
2. Select the ' GL Account' to map it to from the drop down list
3. Press the 'Add' button
4. The new mapping will be displayed in the list at the bottom of the screen

### How do I update a Financial Account Type / GL Account mapping?

A Financial Account Type / GL Account Type mapping can be updated by modifying the GL Account only. Unlike other screens in this area if the GL Account Type needs to be updated then it can be done by creating a new record with the correct GL Account type which will overwrite the existing record.
Example: To update a Financial Account Type / GL Account Type mapping

1. Locate the entry that needs to be updated in the list of Financial Account Type / GL Account Type mappings
2. Modify the 'GL Account 'by using the drop down list next to the GL Account field
3. Press the 'Update' button
4. The updated mapping will be displayed

NOTE TO CHECK: Investigate Financial Account menus to see if these details are shown as part of it......

### How do I remove a Financial Account Type / GL Account mapping?

Example: To delete a Financial Account Type / GL Account Type mapping

1. Locate the entry that needs to be deleted in the list of Financial Account Type / GL Account Type mappings
2. Press the 'Remove' button next to the entry

### 12.1.4.5 Sales Invoice

**Definition: What is it?**

The Sales Invoice sub menu is used to specify the default account to be used for the individual line items that appear on a Sales Invoice. The items are identified by a line description which can be mapped to a specific general ledger account. Sales invoices can be made up of a variety of items as well as the product that is being sold (eg discounts, promotions, work effort or labour costs etc). The majority of businesses will want to track these type of items separately in the general ledger and this screen will allow this type of setup.

This setup will translate to one side of the journal entry only.

**IMPORTANT:** This screen is one of the screens where the default entries that are displayed here are entered via the Global GL Settings under the sub menu 'Invoice Item Type'. This screen allows users to override the global settings for the Sales Invoice item type. An example of why this could be necessary could be that a company many want to isolate the sales reporting of a specific department or business unit separately (eg subledgers etc) but still have the option of a 'catch all' global general ledger account.

By default OFBiz has 19 entries setup that come as part of the demo data setup. This gives a good example of how the various Sales Invoice items can be split across the general ledger accounts.

| Sales Invoice Item | Default GL Account Id | Override GL Account | Active GL Description |
|---|---|---|---|
| Invoice Adjustment | 410000 | | DISCOUNTS ON SALES |
| Invoice Item Adjustment | 410000 | | DISCOUNTS ON SALES |
| Invoice Additional Feature | 409000 | | MISCELLANEOUS SALES |
| Invoice Discount | 410000 | | DISCOUNTS ON SALES |
| Invoice Digital Good Item | 401000 | | GENERAL SALES |
| Invoice Finished/Digital Good Item | 401000 | | GENERAL SALES |
| Invoice Finished Good Item | 401000 | | GENERAL SALES |
| Invoice Interest Charge | 810000 | | INTEREST INCOME ON FINANCE CHARGES OR CUSTOMER ACCOUNTS |
| Invoice Miscellaneous Charges | 409000 | | MISCELLANEOUS SALES |
| Invoice Product-Feature Item | 401000 | | GENERAL SALES |
| Invoice Product Item | 401000 | | GENERAL SALES |
| Invoice Promotion | 410000 | | DISCOUNTS ON SALES |
| Invoice Sales Tax | | | |
| Invoice Shipping and Handling | 409000 | | MISCELLANEOUS SALES |

| | | |
|---|---|---|
| Invoice Service Product Item | 401000 | GENERAL SALES |
| Invoice Surcharge | 409000 | MISCELLANEOUS SALES |
| Invoice Time-Entry Item | 401000 | GENERAL SALES |
| Invoice Warranty | 409000 | MISCELLANEOUS SALES |
| Invoice Work-Effort Item | 401000 | GENERAL SALES |

NOTE: If an override account is added it will appear in the Override GL Account column on the screen.
NOTE TO CHECK: The only mapping that seems a bit out of place here is Sales Tax. It is blank because Sales Tax is setup using Tax Authorities so dont know why you would want to override the Sales Tax account to a Sales Revenue Account..ie. one of the limited 7....?????? Doesnt make sense - need to do some investigation.
TO DO: Add a link to the Global GL Account settings..... Also need to highlight that in the Global Settings it uses the ENUM description to select the item and there are duplicate descriptions between the Sales Invoice and the Purchase Invoice. Not too much of a problem here but it does cause problems in Agreements when setting up things like Commissions based on line items as you cant tell the difference between the description of a Sales Invoice item called 'Invoice Adjustment' and a Purchase Invoice item called 'Invoice Adjustment' ..... except by trial and error

## What is it used for?

A key mapping used is linked directly to the Product Type (eg Invoice Digital Good Item, Invoice Finished Good Item, Invoice Finished/Digital Good Item....). This controls where the sales revenue received from the sale of the product is stored in the general ledger.
Only a limited number of general ledger accounts that are available to be mapped. Currently this is 7 and limited to the accounts that have been assigned to the organisation from the Global Chart of Accounts that have a 'GL Account Class Id' = 'Revenue' (NOTE: You will see that Discounts on Sales is not available to be selected because it's GL Account Class Id = 'Cost of Goods Sold Expense'. It appears as a default because it is setup in the Global GL settings that doesnt seem to have any limitations of the account......TO CHECK)
How the Sales Invoice mappings are used is best shown by an example.
A very simple description of an online Sales Order Process could be as follows:

1. Customer Orders a Product (and Creates a Sales Order)
2. Customer Pays for Product (via Credit Card, Internet Banking etc)
3. Vendor confirms Payment and Dispatches the Product to the Customer

Let's focus on the second part step of 3 in more detail.

- The vendor has verified that the customer payment has been received
- In OFBiz Order Manager they will then look up the relevant Sales Order and then click the 'Quick Ship Entire Order' button to log the dispatch of the order in the system

- The 'Quick Ship Entire Order' button is a trigger for 'automatic' an accounting transaction
- The transaction type that is triggered is called 'Sales Invoice'

| Transaction Type | Triggered By | Accounting Entries Generated | Comments |
|---|---|---|---|
| Sales Invoice | Pack Shipment Quick Ship Entire Order | DR 120000 Accounts Receivable DR 410000 Discounts on Sales DR 400000 Sales CR 400000 Sales CR 22????? Sales Tax Collected | DR Sales is used for item promotions where product cost is simply reversed. Only order promotions are coded to Discounts<br>The Sales Tax account will be dependent on your sales tax setup. The demo data posts to tax accounts by US state. |

One of the CR (or Credit) entries for the Sales Invoice transaction is created using the Sales mapping defined here in the  Sales Invoice (and the other is created another GL Account default for 'Tax Authority GL Accounts')
All of the the DR (or Debit) entries for the Sales Invoice transaction (except for Accounts Receivable which is comes from the GL Account Type defaults) are created using the mappings defined here in the Sales Invoice

## What's on the screen?

To DO

### How do I add a Sales Invoice override mapping?

By default there are no Sales Invoice override mappings that are configured as part of the OFBiz demo data.
Example: To add a Sales Invoice override mapping

1. Select the 'Invoice Item Type' from the drop down list
2. Select the ' Override Revenue GL Account Id' to map it to from the drop down list
3. Press the 'Save' button
4. The new mapping will be displayed in the 'Override GL Account' column in the list at the bottom of the screen

### How do I update a Sales Invoice override mapping?

An existing Sales Invoice override mapping cannot be updated but needs to be removed and a new mapping added. If you try to add an override to an item that already has an override you will get a duplicate record error message.

### How do I remove a Sales Invoice override mapping?

NOTE: Only the override mapping can be deleted. The default mapping record cannot be deleted here (even though the Remove button is displayed next to it!)
Example: To remove a Sales Invoice override mapping?

1. Locate the entry that needs the override deleted in the list of Sales Invoice override mappings
2. Press the 'Remove' button next to the entry
3. The override mapping will be removed from the 'Override GL Account' column of the entry

## 12.1.4.6 Purchase Invoice

### Definition: What is it?

The Purchase Invoice sub menu is used to specify the default account to be used for the individual line items that appear on a Purchase Invoice. The items are identified by a line description which can be mapped to a specific general ledger account. Purchase invoices can be made up of a variety of items as well as the product that is being bought (eg discounts, promotions, work effort or labour costs etc). The majority of businesses will want to track these type of items separately in the general ledger and this screen will allow this type of setup.

This setup will translate to one side of the journal entry only.

**IMPORTANT:** This screen is one of the screens where the default entries that are displayed here are entered via the Global GL Settings under the sub menu 'Invoice Item Type'. This screen allows users to override the global settings for the Purchase Invoice item type. An example of why this could be necessary could be that a company many want to isolate the sales reporting of a specific department or business unit separately (eg subledgers etc) but still have the option of a 'catch all' global general ledger account.

TO DO: Add a link to the Global GL Account settings..... Also need to highlight that in the Global Settings it uses the ENUM description to select the item and there are duplicate descriptions between the Sales Invoice and the Purchase Invoice. Not too much of a problem here but it does cause problems in Agreements when setting up things like Commissions based on line items as you cant tell the difference between the description of a Sales Invoice item called 'Invoice Adjustment' and a Purchase Invoice item called 'Invoice Adjustment' ..... except by trial and error

### What is it used for?

**VERY IMPORTANT NOTE:** Need to do more investigation but the it looks like these Purchase Invoice mappings dont work when used as part of the Purchase Order to Purchase Invoice Process. (Have been doing some tests to try and get it to post to a different account than 'Uninvoiced Shipment Receipts' and 'Inventory' but hasnt worked so far.) We need to be able to specify things such as Sales Tax, Freight and any Purchase Order adjustments

These override mappings do work if there is no Purchase Order just a Purchase Invoice as shown in the simple process below.

How the Purchase Invoice mappings are used is best shown by an example.

A very simple description of a Purchase Invoice Process could be as follows:

1. You have ordered something from a supplier (eg indirect purchasing such as stationery etc via phone)

2. The Supplier ships the products to you (NOTE: as they are not stored in the Warehouse but in your offices - so dont need an Inventory Receive.....????)
3. You receive the product and an invoice from the Supplier (Purchase Invoice)
4. You enter the Purchase Invoice pay the Supplier the amount invoiced

Let’s focus on step of 4 in more detail.

- You have received the product from the supplier with an invoice
- In OFBiz you enter the Purchase Invoice using 'Create New' in the 'Invoices' menu of Accounting Manager
- Using the 'Items' sub menu you can create individual items on the Purchase Invoice (eg Paper, Pens, Sales Tax etc and they dont need to have a Product Id associated with them)
- When you add a new invoice item to the Purchase Invoice it is the 'Invoice Item Type' that is affected by the Purchase Invoice override mappings

- The Purchase Invoice can then be moved to various statuses (Approved, Received, Ready or Cancelled)
- When the status is moved to 'Ready' this is a trigger for an 'automatic' accounting transaction type
- The transaction type generated is called 'Purchase Invoice' and it uses the Purchase Invoice override mappings

| **Transaction Type** | **Triggered By** | **Accounting Entries Generated** | **Comments** |
|---|---|---|---|
| Purchase Invoice | Purchase Invoice Status moved to 'Ready' | DR 516100 Purchase Order Adjustments<br>CR 210000 Accounts Payable | NOTE: The Sales Tax entry was not created even though there was an invoice item and it was mapped to PO adjustments....... a bug?????? |

## What's on the screen?

To do

### How do I add a new Purchase Invoice override mapping?

By default there are no Purchase Invoice override mappings that are configured as part of the OFBiz demo data.
Example: To add a Purchase Invoice override mapping

1. Select the 'Invoice Purchase Item Type' from the drop down list
2. Select the ' Invoice Override Expense GL Account Id' to map it to from the drop down list
3. Press the 'Save' button
4. The new mapping will be displayed in the 'Invoice Override Expense GL Account' column in the list at the bottom of the screen

### How do I update a Purchase Invoice override mapping?

An existing Purchase Invoice override mapping cannot be updated but needs to be removed and a new mapping added. If you try to add an override to an item that already has an override you will get a duplicate record error message.

### How do I remove a Purchase Invoice override mapping?

NOTE: Only the override mapping can be deleted. The default mapping record cannot be deleted here (even though the Remove button is displayed next to it!)
Example: To remove a Purchase Invoice override mapping?

1. Locate the entry that needs the override deleted in the list of Purchase Invoice override mappings
2. Press the 'Remove' button next to the entry
3. The override mapping will be removed from the 'Invoice Override Expense GL Account' column of the entry

## 12.1.4.7 Payment Type - GL Account Type Id

### Definition: What is it?

The Payment Type GL Account Type Id is used to translate (or map) the different payment types to a specific GL Account Type Id. The GL Account Type Id is then used via the GL Account Type Id defaults to translate to one side of a journal entry.
NOTE: This GL Account default is used to link to another one of the GL Account defaults

### What is it used for?

A Payment Type is just a way to categorize transactions. Examples of Payment Types could be as follows:

- Commission Payments
- Customer Payments
- Vendor (or Supplier) Payments
- Customer Refunds
- Customer Prepayments or Deposits

These payment types can then be mapped to the required account type in the Chart of Account. Examples of these type of mappings could be as follows:

- Customer Payments are mapped to Account Receivable
- Vendor (or Supplier) Payment are mapped to Account Payable
- Customer Refunds are mapped to Customer Credits

### What's on the screen?

To do

### How do I add a Payment Type / GL Account Type Id mapping?

There are currently 13 different Payment Type / GL Account Types mappings that come as part of the demo data with OFBiz and should cover a good variety of payment related transactions.
Example: To add a Payment Type / GL Account Type Id mapping

1. Select the 'Payment Type Id' from the drop down list
2. Select the 'GL Account Type Id' to map it to from the drop down list
3. Press the 'Save' button
4. The new Payment Type / GL Account Type mapping is displayed in the list at the bottom of the screen

### How do I update a Payment Type / GL Account Type Id mapping?

A Payment Type / GL Account Type mapping cannot be updated directly but needs to be removed then re-created. If you try to update an existing entry you will get an 'duplicate key' error message.
Example: To update a Payment Type / GL Account Type mapping

1. Press the 'Remove' button next to the entry that you want to update
2. The entry is removed from the list of entries displayed
3. Select the 'Payment Type Id' from the drop down list
4. Select the updated 'GL Account Type Id' to map it to from the drop down list
5. Press the 'Save' button
6. The new Payment Type / GL Account Type mapping is displayed in the list at the bottom of the screen

### How do I remove a Payment Type / GL Account Type Id mapping?

Example: To remove a Payment Type / GL Account Type mapping

1. Press the 'Remove' button next to the entry that you want to delete
2. The entry is removed from the list of entries displayed

## 12.1.4.8 Payment Method Id - Gl Account Id

### Definition: What is it?

The Payment Method GL Account Type Id is used to map the different payment methods (eg Cash, Cheque etc) to a specific GL Account Type Id. This will translate to one side of a GL entry only.

### What is it used for?

A Payment Method is just a way to define the ways in which payments can be made. Each payment method can be linked to a different account in the general ledger. A main GL account used would be the one that represents the Company bank account. In the demo data mappings Electronic

Funds Transfer, Company Account, Financial Account are all linked to the Company bank account GL account.
OFBiz demo data defines 15 different payment methods as follows:

- Cash
- Certified Cheque
- Company Account
- Company Cheque
- Electronic Funds Transfer (NOTE TO CHECK: Problem with definition or terminology - is this a Direct Debit.... ?? A direct debit is controlled by the payee and an automatic payment via bank account is controlled by the payer)
- Billing Account
- Cash on Delivery (COD)
- eBay
- Offline Payment (NOTE: Is this ambiguous - since COD is an offline payment...)
- PayPal
- WorldPay
- Financial Account
- Gift Certificate
- Money Order
- Personal Cheque

NOTE: A point to note is that these payment methods dont include Credit Cards....(which I think is on purpose...). The majority of these payment methods are linked to 'Undeposited Receipts' but an additional accounting transaction may be needed once the funds have cleared and are available in the Company bank account.

## What's on the screen?

To do

### How do I add a new Payment Method Id / GL Account Id mapping?

Example: To add a Payment Method Type / GL Account Type Id mapping

1. Select the 'Payment Method Type' from the drop down list
2. Select the 'GL Account Id' to map it to from the drop down list
3. Press the 'Save' button
4. The new Payment Method Type / GL Account Type mapping is displayed in the list at the bottom of the screen

### How do I update a Payment Method Id / GL Account Id mapping?

A Payment Method Type / GL Account Type mapping cannot be updated directly but needs to be removed then re-created. If you try to update an existing entry you will get an 'duplicate key' error message.
Example: To update a Payment Method Type / GL Account Type mapping

1. Press the 'Remove' button next to the entry that you want to update

2. The entry is removed from the list of entries displayed
3. Select the 'Payment Method Type' from the drop down list
4. Select the updated 'GL Account Type' to map it to from the drop down list
5. Press the 'Save' button
6. The new Payment Method Type / GL Account Type mapping is displayed in the list at the bottom of the screen

#### How do I remove a Payment Method Id / Gl Account Id mapping?

Example: To remove a Payment Method Type / GL Account Type mapping

1. Press the 'Remove' button next to the entry that you want to delete
2. The entry is removed from the list of entries displayed

### 12.1.4.9 Variance Reason GL Accounts

#### Definition: What is it?

The Variance Reason / GL Account default is used for mapping any stock differences to a particular general ledger account. If there are variances in the number of products that are in stock then this affects the value of inventory in the general ledger. By using this GL default you can offset any differences in stock to the relevant general ledger account.

#### What is it used for?

The number of products (or items) in stock can vary. These differences can be caused by numerous reasons. Some of these could be as follows:

- Products have been damaged
- Products were lost or stolen
- Products were found
- Under or over supply of a Product from a Supplier (eg. You have ordered 10 and 11 are delivered....)
- Free samples or giveaways to potential clients

NOTE: These mappings are used in Catalog Manager when a manual inventory adjustment is done through the Inventory Item screens.

#### What's on the screen?

To do

#### How do I add a new Variance Reason / GL Account mapping?

There are 6 mappings that come as part of the OFBiz demo data.
Example: To add a Variance Reason / GL Account Type Id mapping

1. Select the 'Variance Reason Id' from the drop down list
2. Select the 'GL Account Type Id' to map it to from the drop down list

3. Press the 'Add' button
4. The new Variance Reason / GL Account Type mapping is displayed in the list at the bottom of the screen

### How do I update a Variance Reason / GL Account mapping?

Example: To update a Variance Reason Type / GL Account Type mapping

1. Select the 'Variance Reason Id' from the drop down list
2. Select the updated 'GL Account Type Id' to map it to from the drop down list
3. Press the 'Add' button
4. The updated Variance Reason / GL Account Type mapping is displayed in the list at the bottom of the screen

### How do I remove a Variance Reason / GL Account mapping?

Example: To remove a Variance Reason / GL Account Type mapping

1. Press the 'Remove' button next to the entry that you want to delete
2. The entry is removed from the list of entries displayed

## 12.1.4.10 Credit Card Type GL Account

### Definition: What is it?

The Credit Card Type / GL Account default is used to map different types of credit card to different general ledger accounts.
NOTE: This setup will affect one side of a journal entry only.

### What's it used for?

This type of mapping is useful if you need to track the amounts to be collected from different credit card agents. The OFBiz demo data comes with some setup here (NOTE: The demo entries appear to be duplicated...has something changed in ENUM for defining each credit card type.....?????)
Examples are as follows:

- American Express
- Visa
- Mastercard
- Diners Club

### What's on the screen?

To do

### How do I add a Credit Card Type GL Account mapping?

There are 10 mappings that come as part of the OFBiz demo data but they do appear to be duplicated for some reason. (NOTE: Find out why......)
Example: To add a Credit Card Type / GL Account Id mapping

1. Select the 'Card Type' from the drop down list
2. Select the 'GL Account Id' to map it to from the drop down list
3. Press the 'Add' button
4. The new Credit Card / GL Account Id mapping is displayed in the list at the bottom of the screen

### How do I update a Credit Card Type GL Account mapping?

Example: To update a Credit Card Type / GL Account mapping

1. Select the 'Card Type' from the drop down list
2. Select the updated 'GL Account Id' to map it to from the drop down list
3. Press the 'Add' button
4. The updated Credit Card Type / GL Account mapping is displayed in the list at the bottom of the screen

NOTE: Used 'Visa' as an example to update and the 'CCT_VISA' was updated but the 'Visa' one wasnt....!!! Is this related to the duplication???

### How do I remove a Credit Card Type GL Account mapping?

Example: To remove a Credit Card Type / GL Account mapping

1. Press the 'Remove' button next to the entry that you want to delete
2. The entry is removed from the list of entries displayed

## 12.1.4.11 Tax Authority GL Accounts

### Definition: What is it?

The Tax Authority / GL Account default is used to map different tax authorities to different general ledger accounts. This setup will affect one side of a journal entry only.
NOTE: A tax authority is legal body usually the state (country) that imposes a financial levy on business transactions.

### What is it used for?

Normal business rules require you will to keep track amounts collected or paid to different tax authorities separately. This mapping ensures that money collected or paid to various tax authorities (eg through Sales Orders, Purchase Orders etc) can be separated into specific accounts.
The OFBiz demo data comes with 9 entries to show an example of how this can be setup using the some of the US states as separate tax authorities.

### What's on the screen?

To do

#### How do I add a Tax Authority / GL Account mapping?

Unlike the other GL Account defaults you cannot add a Tax Authority / GL mapping through these screens. It needs to be done via the 'GL Accounts' sub menu under the 'Tax Authorities' menu. The method of how to add a mapping using the 'Tax Authorities' is shown below.
Example: To add a Tax Authority / GL Account mapping

1. From the Accounting Manager / Tax Authorities Menu press the 'Edit' button next to the Tax Authority required
2. Select the sub menu 'GL Accounts'
3. Enter or Lookup the party for the 'Organisation Party Id' field (NOTE: Use 'Company' as default)
4. Enter or Look the GL Account to be mapped to
5. Press the 'Add' button
6. The mapping will be displayed at the bottom of the screen.
7. Return to the Tax Authority / GL Account default and this new mapping will be shown in the list

#### How do I update a Tax Authority / GL Account mapping?

Only the GL Account Id linked to the mapping can be updated.
Example: To update a Tax Authority / GL Account mapping

1. Locate the Tax Authority / GL Account entry that needs to be updated
2. Select the new 'GL Account Id' from the drop down list next to the entry
3. Press the 'Update' button next to the entry

#### How do I remove a Tax Authority / GL Account mapping?

Example: To remove a Tax Authority / GL Account mapping

1. Locate the Tax Authority / GL Account entry that needs to be removed
2. Press the 'Delete' button next to the entry

## 12.1.4.12 Party GL Accounts

### Definition: What is it?

The Party / GL Account mapping allows the translation of different account types (eg Accounts Receivable, Accounts Payable etc) for a party to be mapped to a separate general ledger account. The party role (eg Bill To Customer) is also used to define the mapping even further.
NOTE: OFBiz demo data setup comes with no entries here.

## What is it used for?

It is used as a way of implementing subledger functionality in OFBiz. Subledger functionality is where a higher level account can be split into lower levels. In this case these lower levels can be by party.
An example could be that a business may want to use the general ledger to track the Accounts Receivable (AR) by customer so the chart of account would be setup something like as follows:
120000 Accounts Receivable

- 120010 Accounts Receivable - Customer A
- 120020 Accounts Receiviable - Customer B
- 120030 Accounts Receivalbe - Customer C

This has the main AR account is at the top of the hierarchy and 3 sub accounts below it. Entries for Customers A, B and C would be setup with a role of 'Bill From Customer' as this is a role associated with the customer when the Sales Invoice is generated. When a transaction matching the criteria is processed in the system then these mappings will control where it is posted to. In the case of Customer A any AR transactions with role 'Bill To Customer' are posted to '120010' instead of the standard '120000'.

## What's on the screen?

To do

### How do I add a new Party / GL Account mapping?

Example: To add a new Party / GL Account mapping?

1. Enter or Lookup the party for the 'Party Id' field
2. Select the 'Role Type Id' from the drop down list (NOTE: Be careful that you select the correct role for the transactions you want to track......)
3. Select the 'GL Account Type Id' from the drop down list
4. Select the 'GL Account Id' from the drop down list
5. Press the 'Add' button
6. The new entry will be displayed at the bottom of the screen

### How do I update a Party / GL Account mapping?

Only the GL Account Id linked to the mapping can be updated.
Example: To update a Party / GL Account mapping

1. Locate the Party / GL Account entry that needs to be updated
2. Select the new 'GL Account Id' from the drop down list next to the entry
3. Press the 'Update' button next to the entry

#### How do I remove a Party / GL Account mapping?

Example: To remove a Party / GL Account mapping

1. Locate the Party / GL Account entry that needs to be removed
2. Press the 'Delete' button next to the entry

## 12.1.5 Time Period

### Definition: What is it?

Time periods are a defined period of time (usually a month, quarter or year) that is used to group business transactions. It is a key part of any general accounting setup.
TO CHECK: The minimum setup required for OFBiz is a financial year (eg 1st April - 31st March) as one of the validation checks of accounting transactions is to verify that a time period has been setup for the transaction to be posted to.

### What is it used for?

Time periods can be used for the definition of :

- Company Financial Year
- Fiscal / Tax Periods (weeks, months, quarters)
- VAT / GST Periods
- Sales Periods

### What's on the screen?

The screen is divided into 3 main areas. The first two show lists of the open and closed time periods. The area at the bottom allows you to define and enter a new time period.
TO DO: Add a screenshot

#### How do I add a new time period?

Example: To add a new financial year that runs from 1st April 2008 to 31st March 2009

1. Using the area at the bottom of the screen labelled 'New'
2. Leave the Parent Period Id field blank (NOTE: The financial year will be the parent of other time periods eg fiscal months or GST / VAT periods)

3. Select 'Fiscal Year' from the Period Type Id drop down box
4. Enter '13' in the Period Num field (NOTE: You can use any number that does not conflict with the other time periods you want to use. We plan to define 12 fiscal or tax months so will use 13 for the year)
5. Enter 'FY 2008-2009' in the Period Name field (NOTE: You can use any name you want but make sure it makes sense. This example is an abbreviation for Fiscal Year 2008-2009)
6. Select '1st April 2008' using the calendar lookup in the From Date field and press OK
7. Select '1st April 2009' using the calendar lookup in the Thru Date field and press OK (NOTE: Even though we want our financial year to end on 31st March 2009 the test is used is based on less than not an equal to)
8. Leave the Is Closed field at its default of 'No'
9. Press the 'Create' button

The new time period will now be displayed in the list of open time periods.
Example: To add a new fiscal month or VAT / GST period that runs from 1st April 2008 to 30th April 2008

1. Using the area at the bottom of the screen labelled 'New'
2. Select the previously created financial year 'FY 2008-2009' in the Parent Period Id field
3. Select 'Fiscal Month' from the Period Type Id drop down box
4. Enter '1' in the Period Num field (NOTE: This is the first of 12 periods that we want to define.)
5. Enter 'FM April 2008' in the Period Name field (NOTE: You can use any name you want but make sure it makes sense. This example is an abbreviation for Fiscal Month April 2008)
6. Select '1st April 2008' using the calendar lookup in the From Date field and press OK
7. Select '1st May 2008' using the calendar lookup in the Thru Date field and press OK (NOTE: Even though we want our fiscal month to end on 30th April 2008 the test is used is based on less than not an equal to)
8. Leave the Is Closed field at its default of 'No'
9. Press the 'Create' button

The new time period will now be displayed in the list of open time periods.

## How do I update a time period?

NOTE: Time periods cannot be updated via the current time periods screen. If you need to amend time period details then it can be done via Entity Data Maintenance in the Webtools menu.

## How do I close a time period?

To close a time period select the 'Close' button next to the time period. The time period will be removed from the current open time periods area and re-displayed in the closed time periods section of the screen.
NOTE: Closing a time period is a trigger for an automatic accounting transaction as follows:

| Transaction Type | Triggered By | Accounting Entries Generated | Comments |
|---|---|---|---|
| Period Closing | Close Time Period | DR ?????????? (based on the GL account type mapping for Profit Loss) | NOTE: Both sides of this accounting transaction uses the same GL account type default mapping. |

| | |
|---|---|
| CR 336000 Retained Earnings | The account mapping for 'Profit Loss' is not setup as part of the demo data so this transaction will not automatically post to the general ledger but will instead be put in the ERROR_JOURNAL as an unposted transaction.<br>The transaction value is zero for both sides of journal...Even if it does have a value do we want to move it from P&L to Equity during the financial year? Normally this is done once at the end of the financial year???? |

TO CHECK: What happens if you have a transaction that needs to be posted to a closed time period...??

### Other ways to create and update time periods

Time periods can be created, updated or deleted by using the Webtools menu using the following steps:

1. Select the Webtools menu at the bottom of the screen
2. Select Entity Data Maintenance from the Entity Engine Tools section
3. Select the 'All' buttom next to the 'CustomTimePeriod' entity
4. All the entries for that entity will be displayed
5. Select the option you require to:

- 'Create CustomTimePeriod' from the top of the screen

- 'View' (then Edit) or
- Delete

## 12.1.6 Foreign Exchange Rates

### Definition: What is it?

Foreign exchange rates used to convert one currency to another.

### What is it used for?

Usually a business will want to work in one main currency (eg GBP) but will allow transactions in other currencies (eg EUR, USD). These other currencies will need to be converted to the main currency at some point in order to generate financial reports (eg Balance Sheet or P&L) and (most importantly!) to adhere to tax authority regulations.

OFBiz currently allows you to input up to 3 different rates for same currency conversion by using the 'Purpose' field. With this you can specify whether the conversion is to be used internally, externally or leave the field blank.
NOTE: Need to investigate some potential open points and options about this because

- The current screen doesnt allow you to specify when the exchange rate begins - the default is the current date
- Adding a new exchange rate for the same currency automatically expires the previous one
- A transaction that occurs on a specific day could use the specific rate but you may not know or input that rate until the following day
- If you hold an bank account in a currency that is not your main currency then that account needs to be re-valued at the end of each month using the Inland Revenue Department (IRD) specified conversion rate (as is required in NZ)
- All transactions (eg Income) to the General Ledger in a foreign currency also need to use the IRD rate. The rate is not known until after the end of the month required for re-valuation - so may need some form of currency re-valuation process.???

- Would we ever have the case where you would want to put in an end date for a currency conversion but no new one? (eg like changeover to Euro when all other european currencies were no longer supported?)

## What's on the screen?

TO DO : Add a screen shot

### How do I add a new foreign exchange rate?

Example: To add a new rate for US dollars (USD) to Euro (EUR)

1. Select 'USD' in the 'From Currency' the drop down list. (NOTE: if you have set your default currency in the general properties file then this will default to your main default currency)
2. Select 'EUR' in the 'To Currency' drop down list.
3. The 'Purpose' field can be left blank or you can select 'Internal Conversion' or 'External Conversion' from the drop down list
4. Enter the exchange rate in the 'Rate' field (eg 0.72883)
5. Click the 'Update Foreign Currency Rates' button

The new foreign exchange rate will be displayed.
NOTE: The start date and time of the new rate will be the current date and time.

### How do I update an existing foreign exchange rate?

NOTE: Existing foreign exchange rates do not get updated - instead the existing rate is expired and a new one created. However you can currently create 3 different foreign exchange conversions by using the 'Purpose' field to distinguish them.
Use the same steps as adding a new foreign exchange rate.

### How do I delete / expire a foreign exchange rate?

NOTE: Existing foreign exchange rates cannot be deleted via the current exchange rates screen. Currently rates can be expired by adding a new exchange rate for the same currency conversion and purpose.
Use the same steps as adding a new foreign exchange rate.

# 12.2 Accounting

## Definition: What is it?

The default screen displayed is the Summary.

## What is it used for?

See details for Summary

## What's on the screen?

See details for Summary.

Children Hide Children | View in hierarchy

- 12.2.1 Summary (OFBiz End-User Documentation)
- 12.2.2 Account Reconciliation (OFBiz End-User Documentation)
- 12.2.3 Account Reconciliations (OFBiz End-User Documentation)
- 12.2.4 Accounting Transactions (OFBiz End-User Documentation)
- 12.2.5 Accounting Transaction Entries (OFBiz End-User Documentation)
- 12.2.6 Reports (OFBiz End-User Documentation)
- 12.2.7 Checks (OFBiz End-User Documentation)

## 12.2.1 Summary

Added by Sharan Foga, last edited by Sharan Foga on May 17, 2009 (view change)

## Definition: What is it?

The Accounts Summary screen contains several quick links to key reports to view specific accounts information. It also contains a link to any transactions that have failed to be post as well as options to quickly create accounting transactions.

## What is it used for?

It is used to access key reports such as:

- Trial Balance
- Income Statement (also called the Profit and Loss Statement or Statement of Financial Performance)
- Balance Sheet (also called the Statement of Financial Position)

It also allows access to a list of 'Un-posted transactions' that have failed to be processed into the Chart of Accounts. Usually unposted transactions indicate that there is some error in the general ledger setup which can range from a mapping problem to a financial or fiscal period not being setup.

There are two other options that allows the quick creation of accounting transactions - Sales and Payment. NOTE: That these type of transactions can be created without the need to link to any specific Sales Order or Payment which means that they can be used to make adjustments or corrections to allow accounts to be reconciled.

## What's on the screen?

TO DO

# 12.2.2 Account Reconciliation

## Definition: What is it?

Account Reconciliation is a tool that is used to flag that an accounting transaction has been verified as correct and that the balance of the general ledger account should be increased or reduced by that amount. Normally a reconciliation would consist of many individual transactions and each one would be marked as verified as part of the process.

Account Reconciliation is done by account which means that each general ledger account that has at least one transaction will need to be reviewed and then reconciled.

Currently in OFBiz an Account Reconciliation can be created even if the accounting transaction has already been posted to the general ledger.

**VERY IMPORTANT NOTE**: There appear to be a couple of possible bugs here as follows:

1. if the transaction is posted before the account reconciliation takes place then the accounting transaction keeps re-appearing in the account reconciliation screen. This means that you can create multiple account

reconciliations for the same entry....which shouldnt be the case..... Do you need to switch off the automatic posting to the GL if the transaction hasnt been reconciled?????

2. when you create a new account reconciliation for the same account it doesnt take into account any previous reconciled balance (this means that you dont have an ongoing current balance for an account as at a particular date. You could use the Income Statement restricted by date criteria but then would have to sift through all the transactions to see which ones were part of your reconciled balance...)

## What is it used for?

All businesses will need to reconcile and validate the entries in their chart of accounts for tax or fiscal purposes. Account Reconciliation is used to verify the balances of each account as at a certain date. Usually a fiscal year is broken down into smaller periods (eg month, quarter etc) and a business would normally want to ensure that their accounts are validated and reconciled from one month to the next. This is extremely important for processing things such as VAT or GST.

Example: A company receives a bank statement detailing all the transactions for the month. Assume that the bank statement reflects all the sales and payments that have been processed in OFBiz.

- Using the Account Reconciliation you will select 111100 General Checking Account (as this account should mirror exactly your bank statement)
- Using the bank statement as the master you will mark (or select the check box) next to the screen transactions that match
- All the transactions selected will be summed (or totalled) and the balance of that calculation will be stored as the 'Reconciled Balance'
- The Reconciled Balance should match the closing balance of your bank statement

NOTE: It may be that additional transactions that are not processed in OFBiz (or have not yet been processed) are shown on your bank statement but not on the screen. This means that your reconciled balance will not match until you create accounting transactions to reflect the missing ones.

NOTE: A new reconciliation on the same general ledger account does not take into account the previous reconciled balance (which will become a problem when you receive your next statement and have an opening balance that you can enter into the system or reconcile)

## What's on the screen?

To do

### How do I create an Account Reconciliation?

NOTE TO CHECK: Does it behave differently if the accounting transaction has not yet been posted....???

Example: To create an Account Reconciliation

1. Select the 'GL Account Id' for the general ledger account you want to reconcile from the drop down box
2. Press the 'Search' button

3. If any transactions exist for the account the list will be displayed (NOTE: This display doesnt show if the transaction was a debit or a credit - which could be a problem when reconciling as dont know whether it went in to the account or came out.....????)
4. Select the individual transactions to reconcile using the check boxes
5. Press the 'Create Account Reconciliation' button

### How do I update an Account Reconciliation?

An Account Reconciliation can be updated using the 'Account Reconciliations' sub menu. Only the following fields can be updated:

- GL Reconciliation Name
- Description
- Reconciled Date

This means that no adjustments can be made for the reconciled balance itself or adding or removing transactions from the initially selected reconciled transactions.

### How do I delete an Account Reconciliation

An Account Reconciliation cannot be currently deleted through the user interface. (NOTE: Not sure if this is recommended but it probably could be removed using Webtools / Entity Data maintenance but you would need to be very careful)

## 12.2.3 Account Reconciliations

### Definition: What is it?

The Account Reconciliations sub menu is used to locate Account Reconciliations that have been previously created on a general ledger account. The screen allows the user to specify date selection options to restrict the search.

### What is it used for?

The Account Reconciliations sub menu is used as follows:

- To locate existing reconciliations
- To update existing reconciliations
- To display reconciled balances for specific general ledger accounts

## What's on the screen?

To Do

### How do I update an existing Account Reconciliation?

NOTE: Only the GL Reconciliation Name, Description and Reconciled Date fields can be updated via the screen.

Example: To update an existing Account Reconciliation

1. Select the 'GL Account Id' for the account required from the drop down box
2. Enter the 'From Date' and 'Thru Date'  (NOTE: The from and to date fields can be left blank if required)
3. Press the 'Search' button
4. If an account reconciliation exists - it will be displayed showing the user that created the reconciliation, the date and the reconciled balance
5. Click on the GL Reconciliation Id for the entry that you want to view
6. The details will be displayed (includes the list of transactions that made up the reconciliation at the bottom of the screen)
7. Enter the updated GL Reconciliation Name, Description or Reconciled Date
8. Press the 'Update' button

NOTE: Need to investigate how to add or remove a transaction from an existing reconciliation. Currently can see how this can be done without going into the Webtools / Entity Data Maintenance.

# 12.2.5 Accounting Transaction Entries

## Definition: What is it?

The Accounting Transactions Entries screen shows details of all accounting transactions that have been generated. Note that this includes transactions that are unposted as well as posted. The 'Is Posted' flag will be set to 'N' for an unposted entry.

The default listing is 'By Account' which means that each account heading will be displayed and any transactions linked to that account will be listed below it. The transaction detail will include the transaction date, whether it is a debit or a credit as well as the transaction amount.

The listing can be changed to be view 'By Date' and the details will then be listed by Transaction Date.

## What is it used for?

There are several different ways this 'accounting transaction listing' can be used. Essentially it is used to find accounting transactions and includes different selection criteria for the user to locate transactions. Account transactions can be located by the some of the following:

- by General Ledger account (where all transactions on a specific GL account can be displayed)
- by Transaction Type (eg Period Closing, Accounts Receivable, Inventory, Incoming Payment, Purchase Invoice)
- by Fiscal GL Id (eg Budget, Actual, Planned)
- by whether it is posted or not
- by specific Party
- by Invoice Number
- by Payment Number
- by Work Effort
- by Product

NOTE: There is an option to select the 'ERROR_JOURNAL' but this may be for transactions that originally failed but then were corrected. Unless you remove the 'ERROR_JOURNAL' from the transaction header it will post with the transactions with the 'ERROR_JOURNAL' still specified as the Gl Journal. Possible suggestion - Could we automatically clear the Gl Journal field if a transaction verifies as OK......???

### What's on the screen?

To do

## 12.2.6 Reports

### Definition: What is it?

The default display is the Trial Balance

### What is it used for?

See details for Trial Balance

### What's on the screen?

See details for Trial Balance

### Children (5)

Hide Children | View in Hierarchy

12.2.6.1 Trial Balance
12.2.6.2 Income Statement
12.2.6.3 Balance Sheet

12.2.6.4 Comparative Balance Sheet
12.2.6.5 Transaction Totals

## 12.2.6.1 Trial Balance

### Definition: What is it?

A Trial Balance is a list of the general ledger accounts showing the debits in one column and the credits in another. The main objective of a trial balance is to ensure that the total credits and total debits balance (eg. total debits = total credits). It also validates that the double entry accounting is working correctly.

The Trial Balance report is an interactive report. This means that it takes all the values from the General Ledger at the current point in time.

NOTE TO INVESTIGATE: The Interactive Trial Balance report could be a potential problem as it is not static. Often businesses need to produce reports as at a specific date in the past (eg as at your last tax period or VAT period). How would OFBiz handle this.....???

### What is it used for?

To do

### What's on the screen?

To do

### How do I ....?

## 12.2.6.2 Income Statement

### Definition: What is it?

This 'Income Statement' is also called the 'Profit and Loss Statement' or 'P&L'. It is the total income minus the total expenses for the business.

### What is it used for?

To do

### What's on the screen?

To do

### How do I....?

### 12.2.6.3 Balance Sheet

#### Definition: What is it?

This is like a financial snapshot of your business at a certain point in time. It lists your assets, liabilities and the difference between the two which is the net worth (or equity) of the business. The balance sheet is also called the 'Statement of Financial Position'

#### What is it used for?

To Do

#### What's on the screen?

To Do

#### How do I.....?

### 12.2.6.5 Transaction Totals

#### Definition: What is it?

The Transactions Totals screen by default gives a listing of all the accounts that have values linked to them. It shows the debits on one side and credits on the other. The display itself is split giving separate posted and unposted account totals

#### What is it used for?

To do

#### What's on the screen?

To do

#### How do I....?

## 12.2.7 Checks

### Definition: What is it?

The default display is for 'Checks to Print'

## What is it used for?

See details for Checks to Print

## What's on the screen?

See details for Checks to Print

## Children (2)

Hide Children | View in Hierarchy
12.2.7.1 Checks to Print
12.2.7.2 Mark Checks Sent

## 12.2.7.1 Checks to Print

### Definition: What is it?

By default the Checks to Print screen will display a list of checks that have been generated by 'Company'. Any outgoing payment transaction that has a payment method specified as 'Company Check' will generate an entry here.

NOTE TO CHECK: Are cheques generated from anywhere else..or any other payment methods...???

### What is it used for?

It is used to either view the details of the checks to printed or to print the check itself.

### What's on the screen?

To do

### How do I create a Check to Print ?

To create a check to print an outgoing payment must be created that used the payment method type 'Company Check'

Example: To create a Check to Print

1. Select the Payments sub menu from Accounting Manager
2. Press the 'Create New Payment' button
3. Enter the type of outgoing payment (eg Vendor Payment, Customer Refund etc)
4. Enter the payment amount
5. Enter the party id
6. Change the Payment Method Type field from its default to 'Company Check'

7. Press the 'Create' button
8. Press the 'Update' button on the following screen
9. Return to the 'Checks to Print' sub menu (Accounting / General Ledger / Accounting / Checks / Checks to Print)
10. The newly created payment will be displayed in the list of checks to print

### How do I update a check to print?

If an outgoing payment status has not been changed to 'Sent' then the check details can be updated and the check reprinted. Once the check status is 'Sent' it will be removed from the 'Checks to Print' list although the payment details can still be accessed and updated via the Payments menu.

Example: To update the details of a check to print

1. Click on the 'Payment Id' of the entry to be amended
2. The Payments Overview screen will be displayed
3. Select the 'Header' sub menu and all the payment details will be displayed
4. Update the details required (eg payment amount etc)
5. Press the 'Update' button (NOTE: If required the check can be reprinted immediately using the 'Print as check' button on this screen)
6. Return to the 'Checks to Print' sub menu (Accounting / General Ledger / Accounting / Checks / Checks to Print)
7. The updated details of the check to print will be displayed

### How do I remove a check to print?

There is no 'Delete' option on this screen so to remove an entry from the Checks to Print list you will need to amend the Payment Method Type Id for the payment. Changing it to something other than 'Company Check' will remove it from the Checks to Print listing.

### How do I print a check?

Example: To print a check

1. Select the check to print using the check box corresponding to the entry required
2. Press the 'Print' button
3. The check will be printed

NOTE: A check can be printed more than once and a printed check will not be automatically removed from the list of checks to print. Checks can also be printed via a button in the Payments screen (TO DO : Add a link)

## 12.2.7.2 Mark Checks Sent

### Definition: What is it?

By default this screen displays the list of checks that have not had their status changed to 'Sent'.   A Reference Number can be attached to each check.

## What is it used for?

An example of how it can be used and simple check process is shown as follows:

1. Outgoing payments are created using Payment Method 'Company Check' or 'Personal Check'
2. Each week a list the list of outgoing checks are printed
3. Each check is sent in the post to the payee
4. Using this screen each check is flagged as sent

## What's on the screen?

To do

## How do I ....?

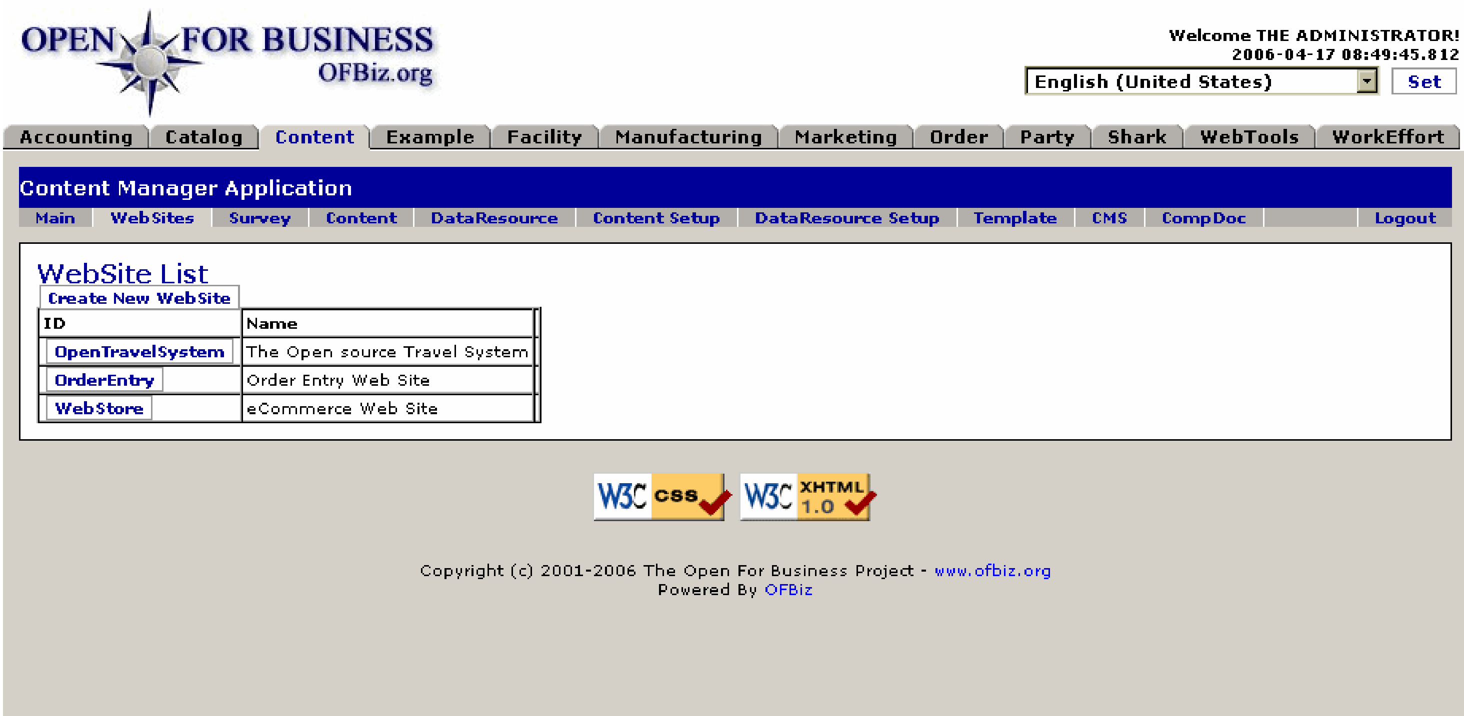
# Chapter 10: Content Manager

## .1 Main

The Main tab defaults to the Web Sites tab.

## .2 Web Sites

### .2.1 FindWebSite




The Main tab and the opening screen in Content Manager is the WebSites tab. Select one by clicking the ID.

### .2.3 Table of existing WebSites

A column for the WebSite ID and another column with the corresponding name are given. Click the ID to be taken to the following Edit WebSite screen.

## .2.4 WebSite tab

### .2.4.1 EditWebSite


Edit (or Create a new) website from this screen; you enter the WebSite ID only for the creation of a new WebSite.

### .2.4.2 link buttons

[Create New WebSite] [Edit Product Store] [Update] [Web Site] [Parties]

### .2.4.3 Web Site ID

This cannot be changed without re-creating the WebSite. You will enter this ID at an empty field only when creating a new website at the [Create New WebSite] link.

### .2.4.4 Site Name

This should be short and unique to identify the Site as a label.

### .2.4.5 Product Store ID (drop-down box)

Choose from the drop-down list.

A click on [Edit Product Store] takes you to Catalog Manager > Stores tab > Store sub-tab where you will work within the Catalog manager to make changes to the associated Product Store. See the Catalog Manager for more information.

### .2.4.6 Allow Product Store Change (Y/N)

Once the WebSite is established, will it be acceptable for the same WebSite to serve a different Product Store?

### .2.4.7 Http Host

The web URL for the Host server.

### .2.4.8 Http Port

The server Port location for the WebSite.

### .2.4.9 Https Host

The Web URL for secure processes.

### .2.4.10 Https Port

The secure Port on the server.

### .2.4.11 Enable Https (Y/N)

If the system is prepared to handle SSL processes for secure transactions, set this to Y.

### .2.4.12 Standard Content Prefix

That portion of the web address set forth in front of all file selections made by the user. This gets him to the Index point, the main page of presentation.

### .2.4.13 Secure Content Prefix

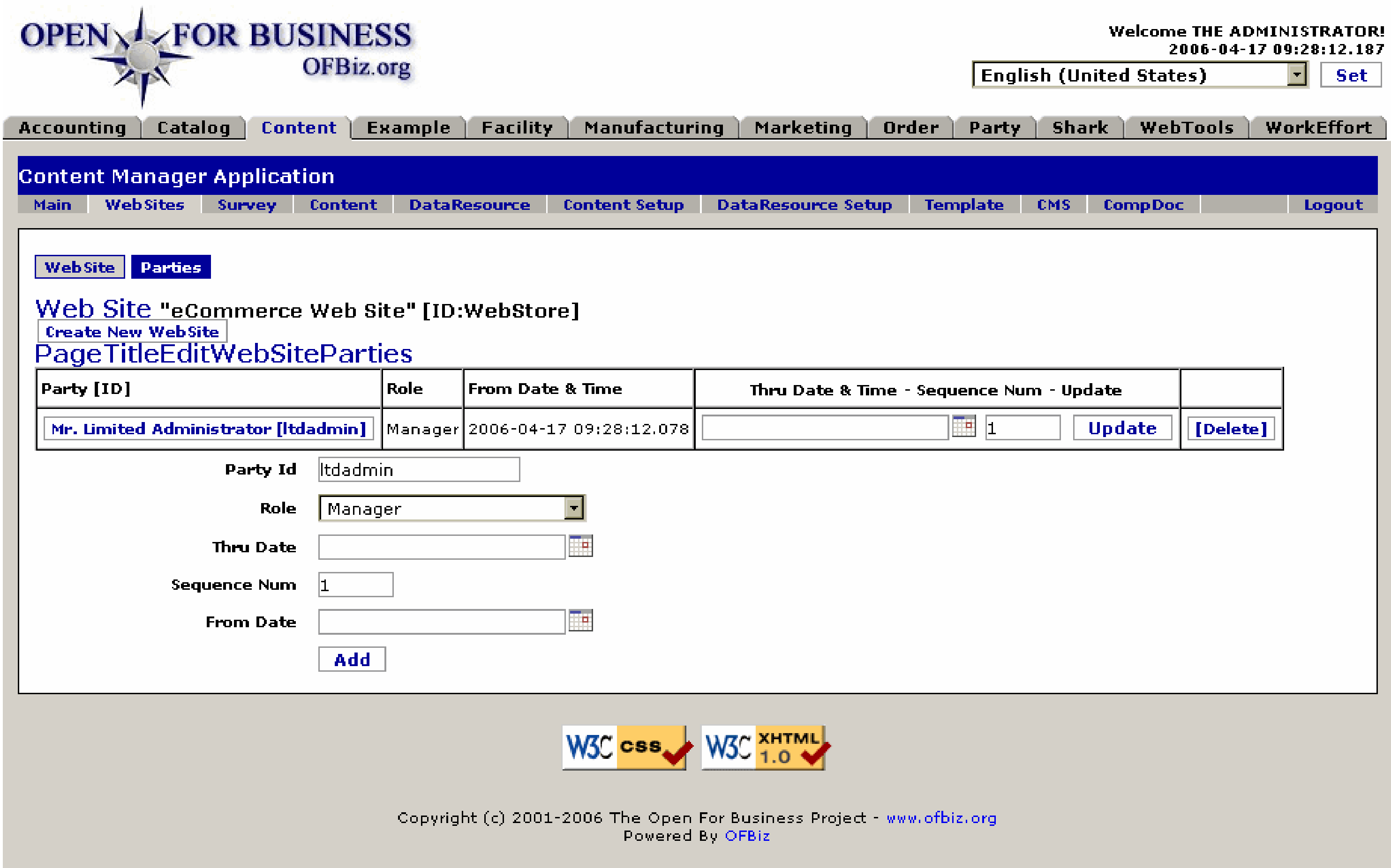
That portion of the Secure web address set forth in front of all file selections made by the user. This gets him to the Index point, the main page of presentation for security clearance.

### .2.4.14 Cookie Domain

Where the cookies are kept.

## .2.5 Parties

### .2.5.1 EditWebSiteParties




Party access to WebSite content is administered from this screen.

### .2.5.2 link buttons

[Create New Web Site] [Update] [Delete] [Add] [WebSite] [Parties]

### .2.5.3 Table of parties

Table of existing parties associated with the WebSite.

### .2.5.3.1 Party (ID)

Click on the Party ID to edit or view details about the Party at the Party Manager.

### .2.5.3.2 Role

Defines the relationship of this Party to the WebSite.

### .2.5.3.3 From Date and Time

When the assignment was established or made effective.

### .2.5.3.4 Thru Date and Time (popup calendar)

Should only exist if the assignment is scheduled to expire.

### .2.5.3.5 Sequence Num

If a sequencing system is in place, this is the assigned number.

## .2.5.4 Tool to add party

### .2.5.4.1 Party ID

Enter the Party ID. This must already exist at the Party Manager.

### .2.5.4.2 Role (drop-down box)

Select the Role to be performed by this Party for the WebSite. If one party has multiple roles, add the Party again with the additional role. Role type must already be assigned for the Party under the Roles tab of the Party Manager.

### .2.5.4.3 Thru Date (popup calendar)

If the Role assignment is to expire at some established point, enter that date here. Otherwise, leave blank.

### .2.5.4.4 Sequence Num

If there is a sequencing system in place, enter the Sequence Number here. Optional.

## .2.5.4.5 From Date (popup calendar)

Defaults to Now without needing to enter it here. If the assignment is to begin at a later date, or if you are documenting an earlier assignment, enter that date here.

# .2.6 Create New Web Site

## .2.6.1 EditWebSite-new

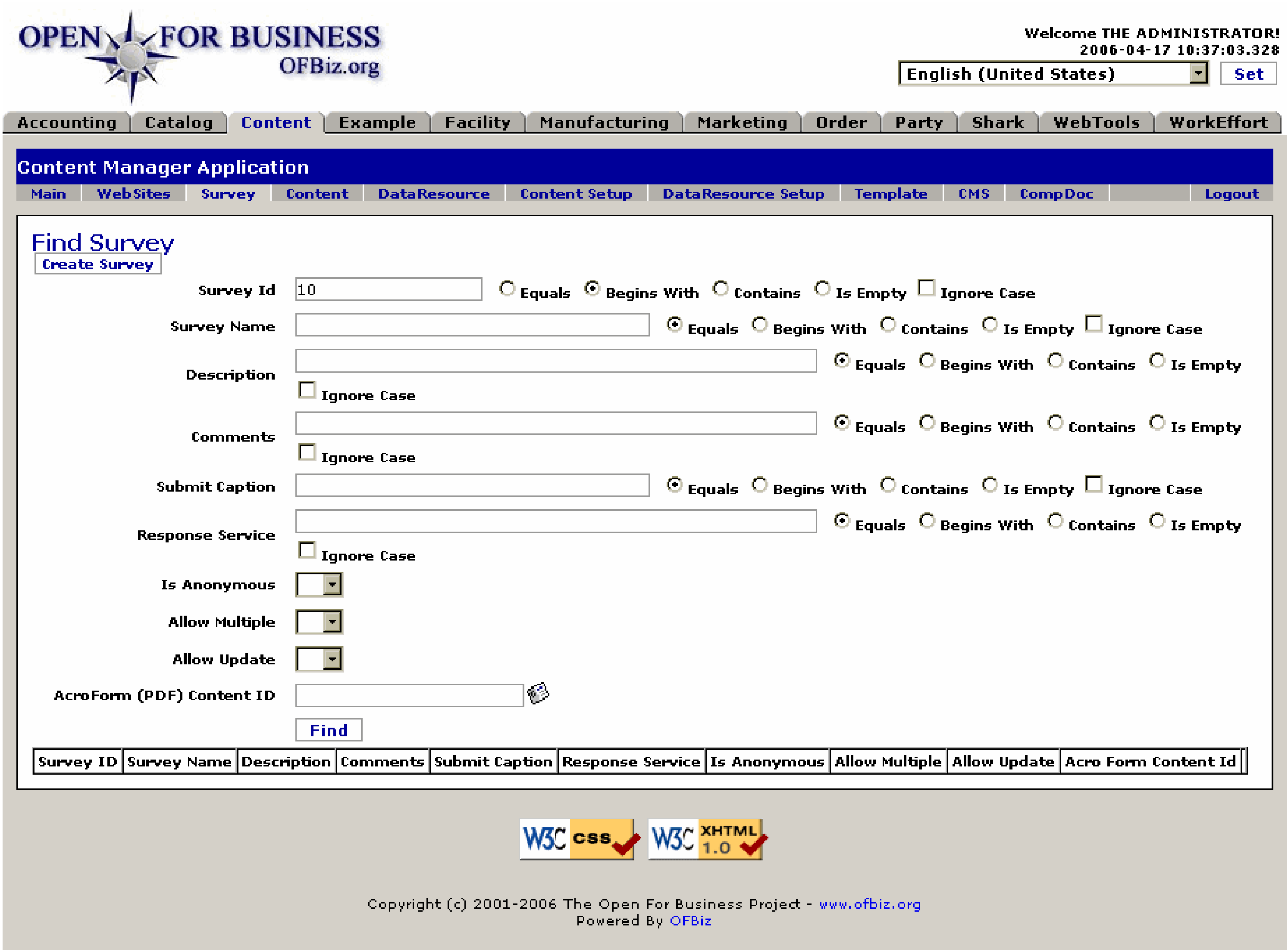

Details of this screen are the same as above except that you assign a new Web Site ID.

## .2.6.2 link buttons

[Update]

## .3 Surveys

### .3.1 FindSurvey




The Survey tab opens this search screen. Enter the ID if you know it; else use this search tool.

### .3.2 link buttons

[Create Survey] [Find] [Previous] [Next]

## .3.3 Search tool

### .3.3.1 Survey ID

This is the number that pulls the Survey details together. If you have this number, enter it. If entered correctly, this will be the only Survey appearing in the Table, below.

Logic parameters for this search field include: Equals, Begins With, Contains, and Is Empty. Ignore Case would be checked if you do not want UPPER or lower case to be a factor in the search.

### .3.3.2 Survey Name

What the Survey is known as.

Logic parameters for this search field include: Equals, Begins With, Contains, and Is Empty. Ignore Case would be checked if you do not want UPPER or lower case to be a factor in the search.

### .3.3.3 Description

Yes, you may search for all or part of the Description field.

Logic parameters for this search field include: Equals, Begins With, Contains, and Is Empty. Ignore Case would be checked if you do not want UPPER or lower case to be a factor in the search.

### .3.3.4 Comments

You may search based upon contents of the Comments field.

Logic parameters for this search field include:

Equals, Begins With, Contains, and Is Empty. Ignore Case would be checked if you do not want UPPER or lower case to be a factor in the search.

### .3.3.5 Submit Caption

If you can remember a portion or all of the caption that accompanies the submittal, use it here.

Logic parameters for this search field include: Equals, Begins With, Contains, and Is Empty. Ignore Case would be checked if you do not want UPPER or lower case to be a factor in the search.

### .3.3.6 Response Service

You could ask for a search return of all Surveys assigned to a particular Response Service. Enter all or part of their identification here.

Logic parameters for this search field include: Equals, Begins With, Contains, and Is Empty.

Ignore Case would be checked if you do not want UPPER or lower case to be a factor in the search.

### .3.3.7 Is Anonymous (Y/N)

If you only want to bring up the Surveys that are anonymous, choose the Y from this drop-down box.

### .3.3.8 Allow Multiple (Y/N)

If you only want to bring up the Surveys that allow multiple entries, choose the Y from this drop-down box.

### .3.3.9 Allow Update (Y/N)

If you only want to bring up the Surveys that allow user updates, choose the Y from this drop-down box.

### .3.3.10 Acro Form (PDF) Content ID (popup search box)

If you recall the Content ID for the Acro Form, you can search on this as well. Use the popup search tool to locate the Acro Form (PDF) Content ID.

## .3.4 Table of Surveys Found

### .3.4.1 FindSurvey-found

### .3.4.2 link buttons

[Create Survey] [Find] [Survey] [Multi-Resps] [Questions] [Find Response] [Response Summary]

### .3.4.3 Survey ID

You may click on this Survey ID number to open an Edit screen with this survey.

### .3.4.4 Survey Name

The name by which you call the Survey among yourselves.

### .3.4.5 Description

While labeled 'Description,' this is actually a descriptive title that will appear when the Survey is presented to the customer.

### .3.4.6 Comments

Useful information to accompany the Survey.

### .3.4.7 Submit Caption

The caption which will accompany the submittal by the respondent.

### .3.4.8 Response Service

Which external organization is doing the analysis of the returned surveys, if any.

### .3.4.9 Is Anonymous (Y/N)

Will the participant's responses be reported anonymously or with attribution?

### .3.4.10 Allow Multiple

Will the respondents be allowed to participate more than once?

### .3.4.11 Allow Update

Will the respondents be able to update their answers later?

### .3.4.12 Acro Form Content ID

When an Acro Form is generated, what is the assigned Content ID.

## .3.5 Create New Survey

### .3.5.1 EditSurvey-new


Begin the creation of a new Survey with this screen. To create questions, add options, etc., use the Edit screen tabs.

### .3.5.2 link buttons

[Update]

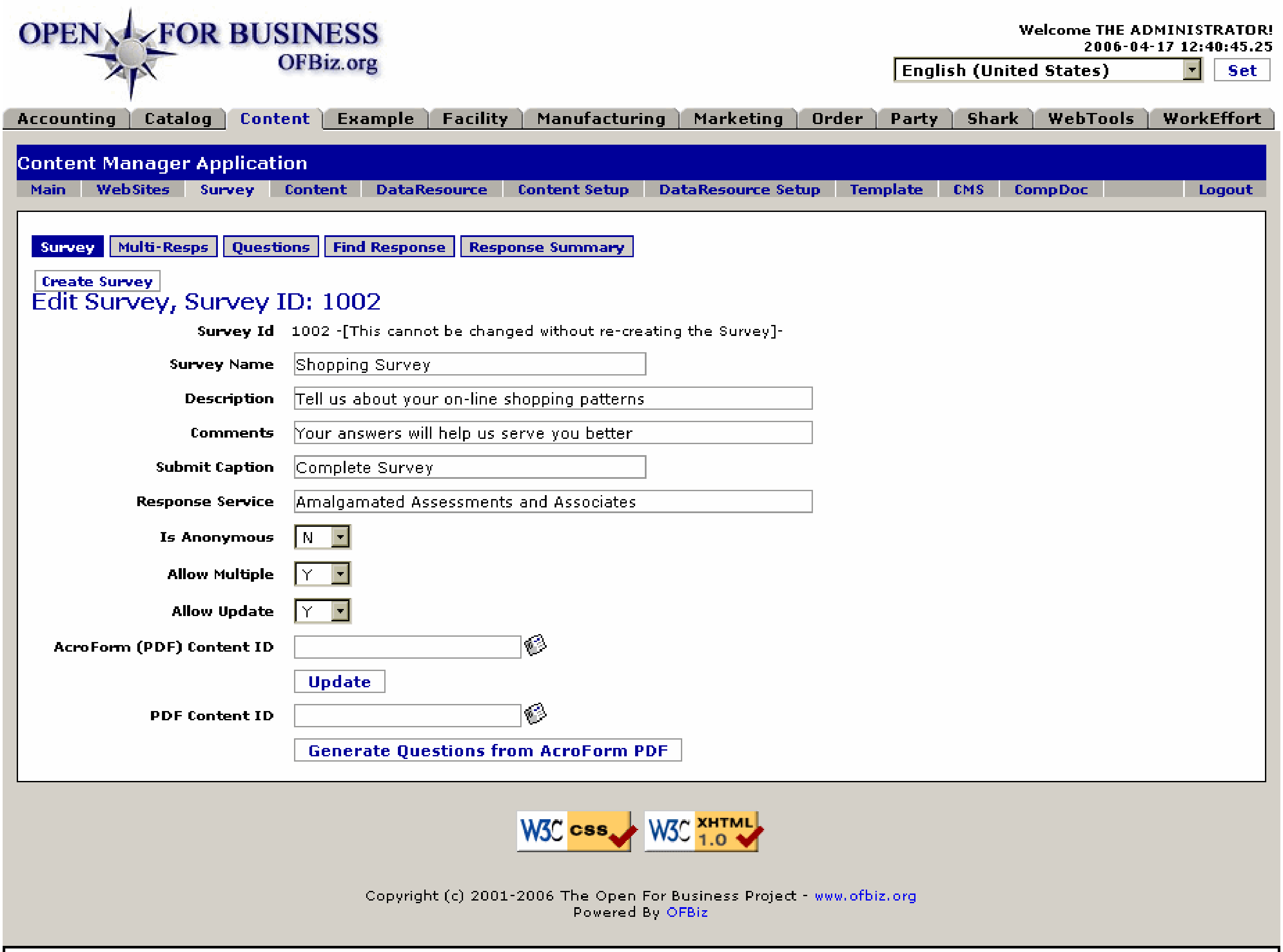
### .3.5.3 Discussion

See the items under Edit Survey, below, for a discussion of the fields. This screen is the same as the Edit screen except there is no Survey ID number because it has not yet been created. The Edit screen also presents tabs for performing additional functions with the established Surveys.

## .3.6 Edit Survey

### .3.6.1 Survey tab

#### .3.6.1.1 EditSurvey




Management of top-level survey details is performed here; content is edited under the Questions tab.

#### .3.6.1.2 link buttons

[Create Survey] [Update] [Survey] [Multi-Resps] [Questions] [Find Response] [Response Summary]

### .3.6.1.3 Survey ID #

This cannot be changed without re-creating the Survey.

### .3.6.1.4 Survey Name

Your internal working name for the Survey; it might not be shown to the Respondant.

### .3.6.1.5 Description

While labeled 'Description,' this is actually a descriptive title that will appear when the Survey is presented to the customer.

### .3.6.1.6 Comments

Your comments to the potential Respondant. Help them understand why they are asked to participate, perhaps give them a benefit; needs to be upbeat and encouraging.

### .3.6.1.7 Submit Caption

The caption which will appear near the button for them to submit their response.

### .3.6.1.8 Response Service

Which company or service (if any) will be evaluating the responses to this survey.

### .3.6.1.9 Is Anonymous (Y/N)

Will the participant's responses be reported anonymously or with attribution?

### .3.6.1.10 Allow Multiple (Y/N)

Will the respondents be allowed to participate more than once?

### .3.6.1.11 Allow Update (Y/N)

Will the respondents be able to update their answers later?

### .3.6.1.12 Acro Form Content ID

Content ID assigned to the Acro Form content.

## .3.6.2 Multi-Resps tab

### .3.6.2.1 EditSurveyMultiResps


A tool to provide analysis of multiple responses to this survey. Assign titles and groups here or edit as needed.

### .3.6.2.2 link buttons

[Create Survey] [Create] [Update] [Survey] [Multi-Resps] [Questions] [Find Response] [Response Summary]

## .3.6.2.3 Discussion

This is where you set up provisions for handling responses to questions that could have a variety of responses over multiple conditions. For example, in this instance, the answers are to reflect the respondent's feelings over three time periods: the last week, the last month and the last year.

First you create a group and give it a name. Each Group is given an ID. Then, within the Group, you assign Columns - each with its own Title and Sequence Number.

The purpose for all of this is to sort out the responses into usable columns of identifiable data.

## .3.6.2.4 Edit Survey Multi-Response Group

### .3.6.2.4.1 Survey Multi Resp Id

The assigned Group number for this Group.

### .3.6.2.4.2 Multi Resp Title

This is where you can change the name of this Group.

### .3.6.2.4.3 Table of response columns

#### .3.6.2.4.3.1 Survey Multi Resp Id

The ID for this Group.

#### .3.6.2.4.3.2 Survey Multi Resp Col Id

The ID for the Column which you are editing in this row.

#### .3.6.2.4.3.3 Column Title

Assign or edit the Column Title in this window.

#### .3.6.2.4.3.4 Sequence Number

Assign the Sequence here by number.

#### .3.6.2.4.3.5 Update

Click on the [Update] link to save any changes you make.

#### .3.6.2.4.4 Add Survey Multi-Resp Column

##### .3.6.2.4.4.1 Column Title

Give the Column a title here.

##### .3.6.2.4.4.2 Sequence Num

Designate the Sequence Number here.

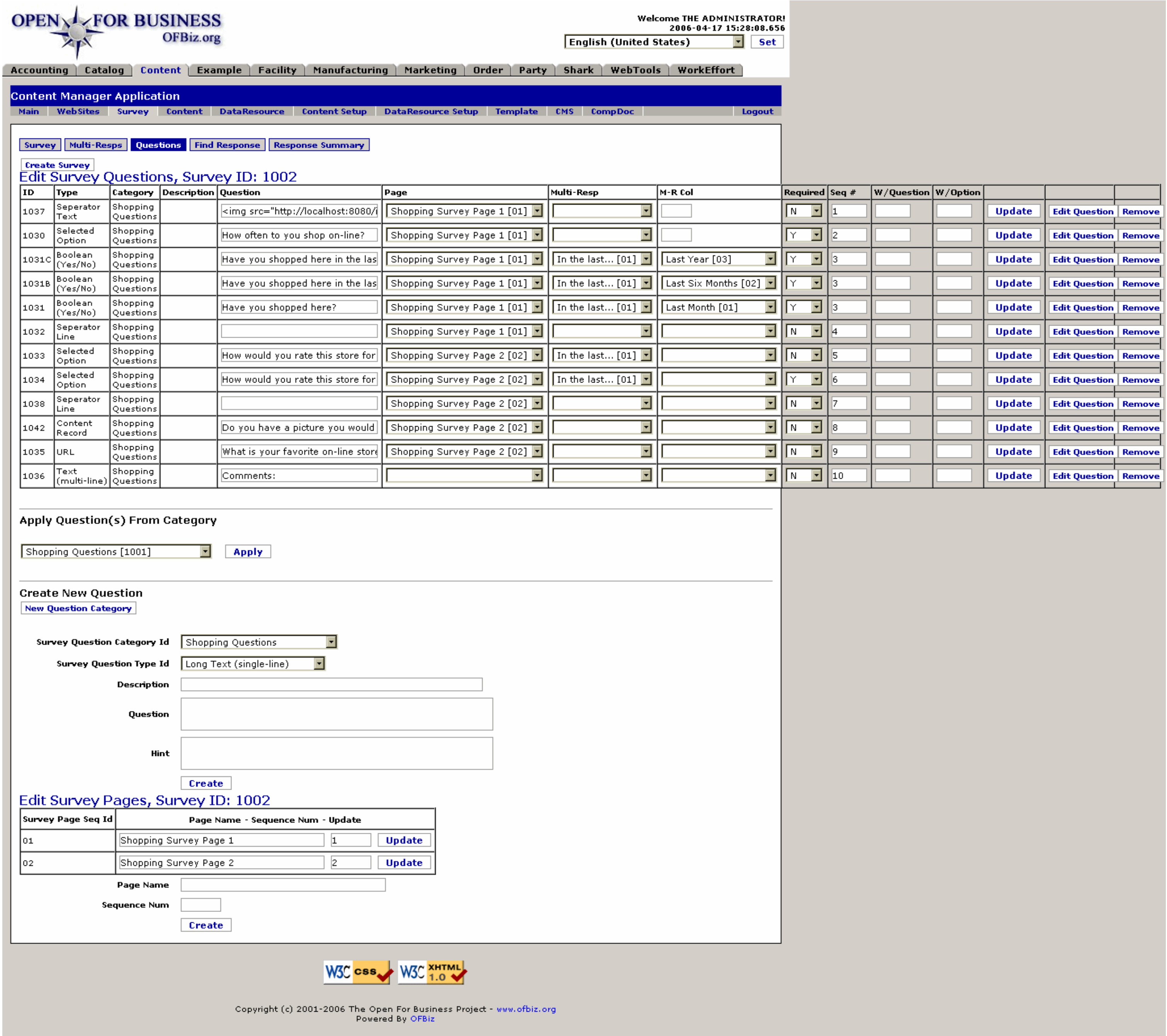
### .3.6.2.5 Add Survey Multi-Response Group

#### .3.6.2.5.1 Multi Resp Title

Create a Title for the new Multi-Response Group here. A Survey Multi Response ID will be automatically generated to associate with this Title when you click on the [Create] link.

# .3.6.3 Questions tab

## .3.6.3.1 EditSurveyQuestions




This screen presents an overview of all of the components of the Survey. New questions are created with the tools and applied from Categories.

## .3.6.3.2 link buttons

[Create Survey] [Update] [Edit Question] [Remove] [Apply] [New Question Category] [Create] [Survey] [Multi-Resps]

[Questions] [Find Response] [Response Summary]

# .3.6.3.3 Edit Survey Questions, Survey ID:

## .3.6.3.3.1 Table of existing Survey Questions

### .3.6.3.3.1.1 ID

As each question is created, a number is automatically assigned to the question; this is that number.

### .3.6.3.3.1.2 Type

As originally assigned, the Type ID is probably one of the following:

- Content Record
- Boolean
- (Yes/No)
- Credit Card Number
- Gift Card Number
- Date String (mm/dd/yyyy)
- Email Address
- Numeric (Currency)
- Numeric (Float)
- Numeric (Long)
- Selected Option
- Password
- Seperator Line
- Seperator Text
- Short Text (single-line)
- Long Text (single-line)
- Text
- (multi-line)
- URL

### .3.6.3.3.1.3 Category

From the various types of questions, this is the one selected originally from the drop-down list, including:

- Gift Card Purchase Questions
- Shopping Questions
- Poll Questions

#### .3.6.3.3.1.4 Description

This appears to be different from the Description described under the earlier Edit Survey screen. It is specific to the Question, not the Survey, and is optional.

#### .3.6.3.3.1.5 Question

You may edit this field within the table. This is the content for this item (Sequence Item) in the Survey. It might contain a link address to the graphic as shown under Sequence Item 1, or appear blank as with the seperator lines. When an actual question, these are the words that will be asked of the respondent.

#### .3.6.3.3.1.6 Page (drop-down box)

The page of the Survey; this can be changed at this field using the drop-down box.

#### .3.6.3.3.1.7 Multi-Resp (drop-down box)

Which Multi-Response item is invoked with this question? Select or change from the drop-down box.

#### .3.6.3.3.1.8 M-R Col

Which column will the Multi-Response answer be found under? This can be assigned or re-assigned with the

drop-down box when needed.

#### .3.6.3.3.1.9 Required (Y/N)

To be an acceptable response, does the Respondent need to answer this Question? You may change this choice using the Y/N drop-down box.

#### .3.6.3.3.1.10 Seq #

The structure of the Survey is controlled by these Sequence numbers.

#### .3.6.3.3.1.11 W/Question

Numbered questions are listed or added here.

#### .3.6.3.3.1.12 W/Option

Numbered options are listed or entered here.

#### .3.6.3.3.1.13 link button columns

[Update] is to confirm and save the changes you may have made in this row.

[Edit Question] brings up the question from the selected row into the section of the screen as shown below; here you can edited as needed.

[Remove] will eliminate the question completely.

## .3.6.3.3.2 Apply Questions(s) From Category

### .3.6.3.3.2.1 surveyQuestionCategoryId

Apply Question From Category - **Shopping Questions [1001]**

| ID | Description | Type | Question | Page | Multi-Resp | M-R Col | Required | Seq # |
|---|---|---|---|---|---|---|---|---|
| 1030 | | Selected Option | How often to you shop on-line? | | | | N | |
| 1031 | | Boolean (Yes/No) | Have you shopped here? | | | | N | |
| 1032 | | Seperator Line | | | | | N | |
| 1033 | | Selected Option | How would you rate this store for products? | | | | N | |
| 1034 | | Selected Option | How would you rate this store for on-line functionality? | | | | N | |
| 1035 | | URL | What is your favorite on-line store? (Enter Valid URL) | | | | N | |
| 1036 | | Text (multi-line) | Comments: | | | | N | |
| 1037 | | Seperator Text | | | | | N | |
| 1038 | | Seperator Line | | | | | N | |
| 1042 | | Content Record | Do you have a picture you would like to attach? | | | | N | |
| 1031B | | Boolean (Yes/No) | Have you shopped here in the last six months? | | | | N | |
| 1031C | | Boolean (Yes/No) | Have you shopped here in the last year? | | | | N | |

**Apply Question(s) From Category**

Shopping Questions [1001] [Apply]

Use the drop-down box to identify the desired Set of questions within a category, click [Apply], and this new table appears between the drop-down box and the original table. Click [Apply] within this added table and the selected Question is added to the Survey Questions.

### .3.6.3.3.2.2 link buttons

[Apply]

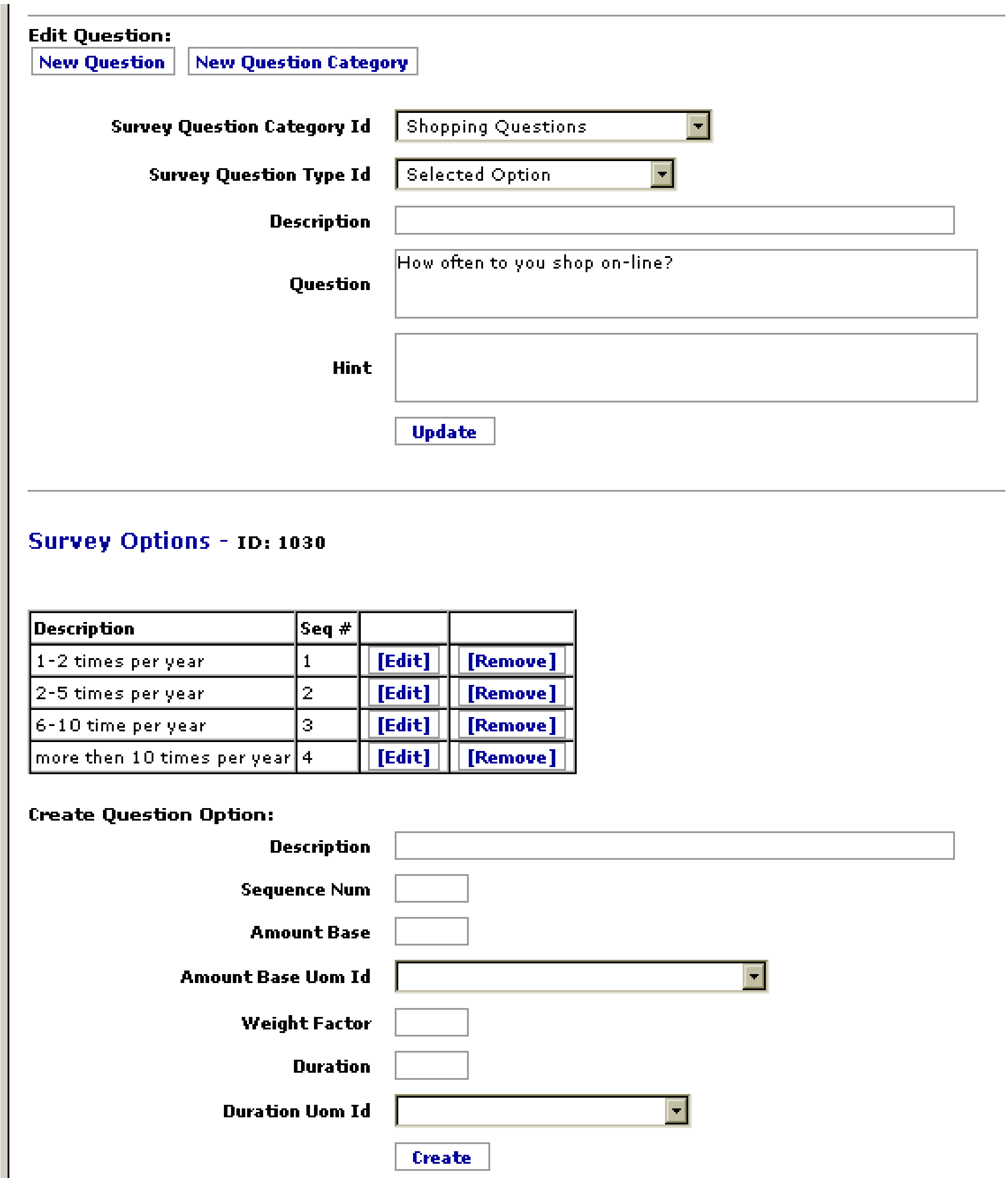
### .3.6.3.3.2.3 Apply Questions(s) From Category - Discussion

When you select a category of questions from the drop-down box, the preceding section is added to the Survey Questions screen. As you click on [Apply] to any of the questions from this category, it will then appear in the Table of Survey Questions, above, for further editing.

You may either make changes in the columns for Required, Seq #, W/Question, or W/Option before you Apply or after the Question has been added to the Survey.

## .3.6.3.3.3 Edit/ Create Question, Create Category tools

### .3.6.3.3.3.1 Edit Question




When you Edit an existing survey Question, additional details of the Question and more options appear.

### .3.6.3.3.3.1.1 EditSurveyQuestions-edit

### .3.6.3.3.3.1.2 Survey Question Category ID (drop-down box)

When you click on [Update], which of the categories in the drop-down box do you want the question to appear under? Choices typically include:

- Gift Card Purchase Questions
- Shopping Questions
- Poll Questions

### .3.6.3.3.3.1.3 Survey Question Type ID (drop-down box)

As originally assigned, the Type ID is probably from one of the following:

- Content Record
- Boolean (Yes/No)
- Credit Card Number
- Gift Card Number
- Date String (mm/dd/yyyy)
- Email Address
- Numeric (Currency)
- Numeric (Float)
- Numeric (Long)
- Selected Option
- Password
- Seperator Line
- Seperator Text
- Short Text (single-line)
- Long Text
- (single-line)
- Text (multi-line)
- URL

### .3.6.3.3.3.1.4 Description

Optional. This might appear to the Respondent.

### .3.6.3.3.3.1.5 Question

Note how we have edited the original question from 'How often <u> to</u> you shop on-line?' to read 'How often DO you shop on-line?'.

#### .3.6.3.3.3.1.6 Hint

If the Question is difficult or requires the customer to remember something from your product advertisements, you can suggest a Hint here to help them remember.

### .3.6.3.3.3.2 Survey Options

#### .3.6.3.3.3.2.1 Table of existing options

Exact column titles depend upon options created in the next sub-section, 'Edit/Create Question Options'.

Existing Options can be Edited or Removed. When Edit is selected, the details of the Option appear in the following subsection.

To create a new Question Option, complete only the needed lines of the subsection Edit/Create Question Options, then press [Create]; the new Option will appear in this Table.

#### .3.6.3.3.3.2.2 Edit/Create Question Options

Available Question Option items include:

- Description
- Sequence Num
- Amount Base
- Amount Base Uom ID (drop-down box)
- Weight Factor
- Duration
- Duration Uom ID (drop-down box)

### .3.6.3.3.3.3 Create New Question

#### .3.6.3.3.3.3.1 EditSurveyQuestions-new

Apply Question From Category - **Shopping Questions [1001]**

| ID | Description | Type | Question | Page | Multi-Resp | M-R Col | Required | Seq # |
|---|---|---|---|---|---|---|---|---|
| 1030 | | Selected Option | How often to you shop on-line? | | | | N | |
| 1031 | | Boolean (Yes/No) | Have you shopped here? | | | | N | |
| 1032 | | Seperator Line | | | | | N | |
| 1033 | | Selected Option | How would you rate this store for products? | | | | N | |
| 1034 | | Selected Option | How would you rate this store for on-line functionality? | | | | N | |
| 1035 | | URL | What is your favorite on-line store? (Enter Valid URL) | | | | N | |
| 1036 | | Text (multi-line) | Comments: | | | | N | |
| 1037 | | Seperator Text | OPEN FOR BUSINESS OFBiz.org | | | | N | |
| 1038 | | Seperator Line | | | | | N | |
| 1042 | | Content Record | Do you have a picture you would like to attach? | | | | N | |
| 1031B | | Boolean (Yes/No) | Have you shopped here in the last six months? | | | | N | |
| 1031C | | Boolean (Yes/No) | Have you shopped here in the last year? | | | | N | |

**Apply Question(s) From Category**

Shopping Questions [1001] **Apply**

Use the drop-down box to identify the desired Set of questions within a category, click [Apply], and this new table appears between the drop-down box and the original table. Click [Apply] within this added table and the selected Question is added to the Survey Questions.

#### .3.6.3.3.3.3.2 Survey Question Category ID

Select the appropriate Category from the drop-down box.

#### .3.6.3.3.3.3.3 Survey Question Type ID (drop-down box)

As originally assigned, the Type ID is probably from one of the following:

- Content Record
- Boolean (Y/N)
- Credit Card Number
- Gift Card Number
- Date String (mm/dd/yyyy)
- Email
- Address

- Numeric (Currency)
- Numeric (Float)
- Numeric (Long)
- Selected Option
- Password
- Seperator Line
- Seperator Text
- Short Text (single-line)
- Long Text (single-line)
- Text (multi-line)
- URL

### .3.6.3.3.3.4 Description

Optional. Enter a short descriptive label if needed.

### .3.6.3.3.3.5 Question

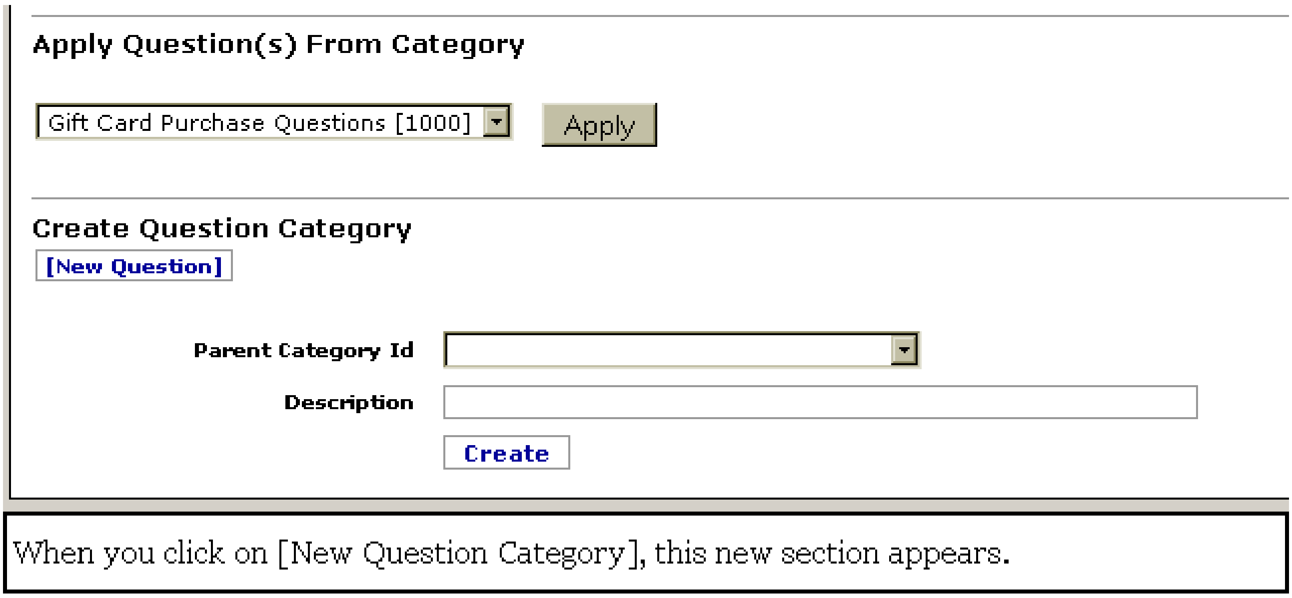
This is the Question you seek to have answered by the Respondent.

### .3.6.3.3.3.6 Hint

If the question requires the Respondent to think, analyze, compare, or remember something, perhaps a hint here will help generate more answers.

## .3.6.3.3.4 Create Question Category

### .3.6.3.3.4.1 EditSurveyQuestions-cat



.3.6.3.3.3.4.2 Parent Category ID (drop-down box)

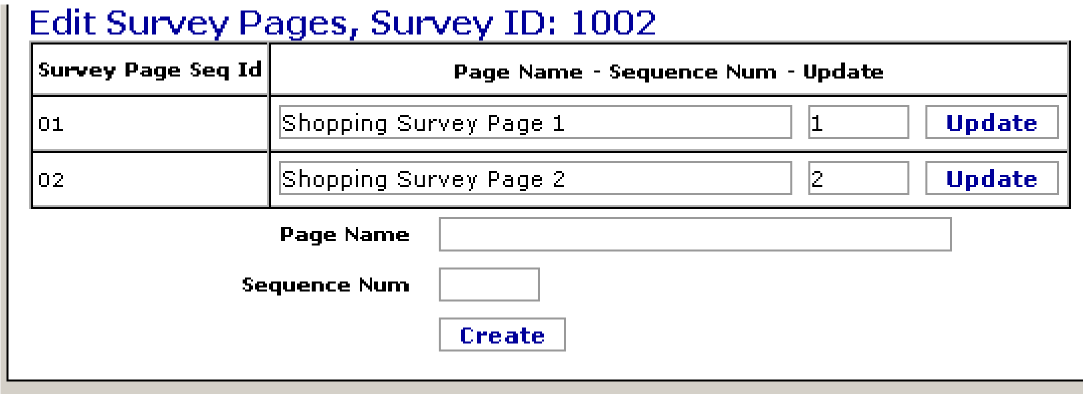
If this new Question Category is a subset of another, existing Parent Category, select it here from the drop-down box.

.3.6.3.3.3.4.3 Description

Describe the new Category.

## .3.6.3.4 Edit Survey Pages, Survey ID:

### .3.6.3.4.1 EditSurveyPages




The final part of the Edit screen focuses on Survey Pages.

### .3.6.3.4.2 link buttons

[Update] [Create]

### .3.6.3.4.3 Table of Survey Pages

#### .3.6.3.4.3.1 Survey Page Seq Id

The Sequence ID for this Survey Page.

#### .3.6.3.4.3.2 Page Name

You can edit the Page Name and its number in the working window; click [Update] to save changes.

#### .3.6.3.4.3.3 Sequence Num

Reposition the pages by changing the sequence number here; click [Update] to save your changes.

### .3.6.3.4.4 Tool to create new Survey Page

#### .3.6.3.4.4.1 Page Name

Enter an assigned Name for the new page here.

#### .3.6.3.4.4.2 Sequence Num

Enter a sequence number here, then press [Create] to create the new page.

### .3.6.4 Find Response tab

#### .3.6.4.1 FindSurveyResponse


Survey responses for the selected Survey are shown here. When too many in the table, use the search tool to find fewer.

### .3.6.4.2 link buttons

[Create Survey] [Create Survey Response] [Lookup] [Build Survey Response From PDF] [Survey] [Multi-Resps] [Questions] [Find Response] [Response Summary]

### .3.6.4.3 Search tool

#### .3.6.4.3.1 Survey Response ID

This is the number for the specific Response you are seeking. If you know the ID, enter it here and this will be the only return found in the table, below.

Select the Radio button which best describes your entry for this term from among these: Equals; Begins With; Contains; or Is Empty. If UPPER or lower Case is not critical, check the Ignore Case box.

#### .3.6.4.3.2 Survey ID

Which Survey was the response to? Just entering this ID will reduce search results to just those responses from that Survey.

Select the Radio button which best describes your entry for this term from among these:

Equals; Begins With; Contains; or Is Empty. If UPPER or lower Case is not critical, check the Ignore Case box.

#### .3.6.4.3.3 Party ID

Which Party created the response? Enter the ID and only responses by this Party will be returned.

Select the Radio button which best describes your entry for this term from among these: Equals; Begins With; Contains; or Is Empty. If UPPER or lower Case is not critical, check the Ignore Case box.

#### .3.6.4.3.4 Response Date (popup calendars)

When was the Survey Response created? If as part of an order, this would be the same as the original Order Date.

Use the popup calendars together with the Radio buttons to establish the date. If you know the exact date, use just the top calendar and select the Equals button. Otherwise, use a combination of the two calendars and the related buttons from these offered: Same Day; Greater Than; From Day Start; Greater Than; Less Than; Up To Day; Up Thru Day; or Is Empty.

#### .3.6.4.3.5 Last Modified Date

If this Response has been edited before, you can search on that date.

Use the popup calendars together with the Radio buttons to establish the date. If you know the exact date, use just the top calendar and select the Equals button. Otherwise, use a combination of the two calendars and the related buttons from these offered: Same Day; Greater Than; From Day Start; Greater Than; Less Than; Up To Day; Up Thru Day; or Is Empty.

#### .3.6.4.3.6 Reference ID

If reference is made to another item, you could search on that here.

Select the Radio button which best describes your entry for this term from among these: Equals; Begins With; Contains; or Is Empty. If UPPER or lower Case is not critical, check the Ignore Case box.

#### .3.6.4.3.7 General Feedback

If the content of any General Feedback is known, enter that here.

Select the Radio button which best describes your entry for this term from among these: Equals; Begins With; Contains; or Is Empty. If UPPER or lower Case is not critical, check the Ignore Case box.

#### .3.6.4.3.8 Order ID

Enter the Order ID here, if known.

Select the Radio button which best describes your entry for this term from among these: Equals; Begins With; Contains; or Is Empty. If UPPER or lower Case is not critical, check the Ignore Case box.

#### .3.6.4.3.9 Order Item Seq ID

If the Response was related to a specific Order Item, enter the Sequence ID here.

Select the Radio button which best describes your entry for this term from among these: Equals; Begins With; Contains; or Is Empty. If UPPER or lower Case is not critical, check the Ignore Case box.

#### .3.6.4.3.10 Status ID

To reduce the Responses to just those associated with a Sales Order at a specific Status, such as Entered, Approved, Completed, etc., enter that Status ID here.

Select the Radio button which best describes your entry for this term from among these: Equals; Begins With; Contains; or Is Empty. If UPPER or lower Case is not critical, check the Ignore Case box.

### .3.6.4.4 Table of responses

#### .3.6.4.4.1 ID

Click on this number to view or edit the Response.

### .3.6.4.4.2 Survey ID

Which Survey was this a Response to?

### .3.6.4.4.3 Party ID

Which Party completed the Response?

### .3.6.4.4.4 Response Date

When was the Response created?

### .3.6.4.4.5 Last

When was the Response last changed or edited?

### .3.6.4.4.6 Reference ID

If reference is made to another document, what is that Reference ID?

### .3.6.4.4.7 General Feedback

What feedback, if any, was included?

### .3.6.4.4.8 Order ID

What order was being completed when this Response was made?

### .3.6.4.4.9 Order Item Seq ID

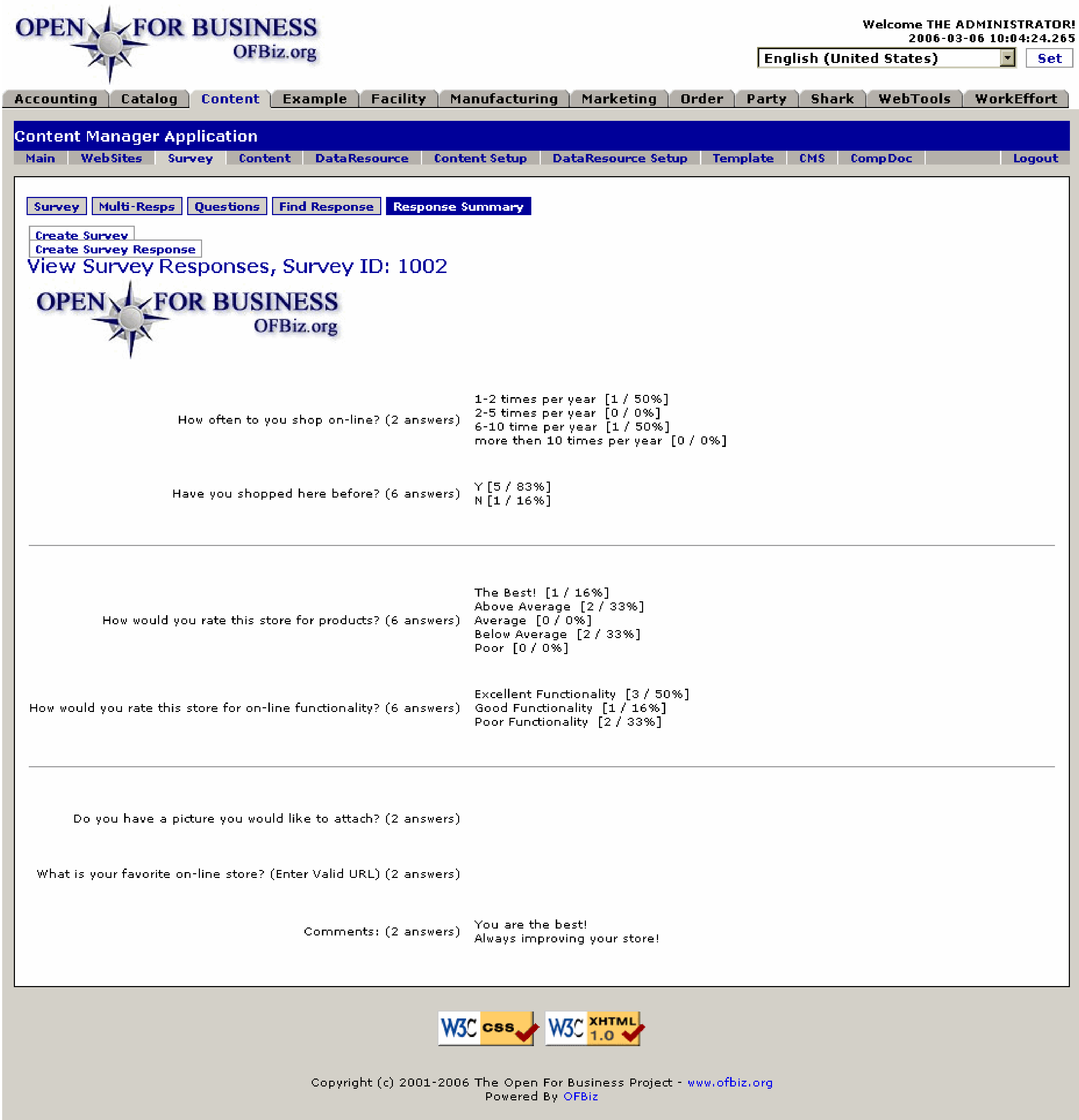
If the Response was related to a specific Order Item, what was that Sequence ID number?

### .3.6.4.4.10 Status ID

Status of the associated Sales Order.

## .3.6.5 Response Summary tab

### .3.6.5.1 ViewSurveyResponses




Review responses to the Survey Questions here; written comments appear at the bottom, beneath the statistical information.

## .3.6.5.2 link buttons

[Create Survey] [Create Survey Response] [Survey] [Multi-Resps] [Questions] [Find Response] [Response Summary]

## .3.6.5.3 List of responses to questions.

This Survey Response report was artificially contrived for demonstration purposes only. The actual Content will be entirely dependent upon:

1. Survey initially selected
2. specific questions in the Question ID at the time responses were generated, and
3. answers given by responders to those questions.

# .4 Content

## .4.1 Find

### .4.1.1 FindContent

OPEN FOR BUSINESS
OFBiz.org

Welcome THE ADMINISTRATOR!
2006-04-17 19:06:21.375
English (United States) | Set

Accounting | Catalog | Content | Example | Facility | Manufacturing | Marketing | Order | Party | Shark | WebTools | WorkEffort

## Content Manager Application

Main | WebSites | Survey | Content | DataResource | Content Setup | DataResource Setup | Template | CMS | CompDoc | Logout

Find | Content | Association | Role | Purpose | Attribute | Metadata

| | |
|---|---|
| Content Id | ◉ Equals ○ Begins With ○ Contains ○ Is Empty ☐ Ignore Case |
| Content Type Id | Document |
| Owner Content Id | ◉ Equals ○ Begins With ○ Contains ○ Is Empty ☐ Ignore Case |
| Instance Of Content Id | ◉ Equals ○ Begins With ○ Contains ○ Is Empty ☐ Ignore Case |
| Data Resource Id | |
| Template Data Resource Id | ◉ Equals ○ Begins With ○ Contains ○ Is Empty ☐ Ignore Case |
| Data Source Id | ◉ Equals ○ Begins With ○ Contains ○ Is Empty ☐ Ignore Case |
| Status Id | |
| Privilege Enum Id | ◉ Equals ○ Begins With ○ Contains ○ Is Empty ☐ Ignore Case |
| Service Name | ◉ Equals ○ Begins With ○ Contains ○ Is Empty ☐ Ignore Case |
| Content Name | ◉ Equals ○ Begins With ○ Contains ○ Is Empty ☐ Ignore Case |
| Description | ◉ Equals ○ Begins With ○ Contains ○ Is Empty ☐ Ignore Case |
| Locale String | |
| Mime Type Id | |
| Character Set Id | ◉ Equals ○ Begins With ○ Contains ○ Is Empty ☐ Ignore Case |
| Child Leaf Count | ◉ Equals ○ Greater Than ○ Greater Than Equals ○ Less Than ○ Less Than Equals |
| Child Branch Count | ◉ Equals ○ Greater Than ○ Greater Than Equals ○ Less Than ○ Less Than Equals |
| Created Date | ○ Equals ◉ Same Day ○ Greater Than From Day Start ○ Greater Than ○ Less Than ○ Up To Day ○ Up Thru Day ○ Is Empty |
| Created By User Login | |
| Last Modified Date | ○ Equals ◉ Same Day ○ Greater Than From Day Start ○ Greater Than ○ Less Than ○ Up To Day ○ Up Thru Day ○ Is Empty |
| Last Modified By User Login | |

Find

Create New

| Edit | Content Type Id | Owner Content Id | Instance Of Content Id | Data Resource Id | Template Data Resource Id | Data Source Id | Status Id | Privilege Enum Id | Service Name | Content Name |
|---|---|---|---|---|---|---|---|---|---|---|
| ECMC180002 | DOCUMENT | | | ECMC180002 | TPL_XML_MB | | | | | rocketfuture2 |
| FACT_1 | DOCUMENT | WebStoreFACTOID | | FACT_1 | | | BLOG_PUBLISHED | CNT_PRV_BRONZE | | Widget Users Live Longer |
| FACT_2 | DOCUMENT | WebStoreFACTOID | | FACT_2 | | | BLOG_PUBLISHED | CNT_PRV_BRONZE | | Widgets outselling Gizmos |
| FACT_3 | DOCUMENT | WebStoreFACTOID | | FACT_3 | | | BLOG_PUBLISHED | CNT_PRV_BRONZE | | Gizmos most popular |
| FACT_4 | DOCUMENT | WebStoreFACTOID | | FACT_4 | | | BLOG_PUBLISHED | CNT_PRV_BRONZE | | Widgets hold value |
| FACT_5 | DOCUMENT | WebStoreFACTOID | | FACT_5 | | | BLOG_PUBLISHED | CNT_PRV_BRONZE | | Gizmos are safe |
| RELATED_1 | DOCUMENT | ECMC180000 | | RELATED_1 | | | BLOG_PUBLISHED | CNT_PRV_BRONZE | | Re:How to operate the Rocket Launcher |

## .4.1.2 link buttons

[Find] [Create New] [Next] [Previous] [Find] [Content]

## .4.1.3 Search parameters

### .4.1.3.1 Discussion of choice buttons

Fields with radio buttons are marked in this document with an (R). Parameter radio buttons include:

- Equals
- Begins With
- Contains
- Is Empty
- Popup calendars are associated with some of these
- parameter radio buttons:
- Equals
- Same Day
- Greater Than From Day Start
- Greater Than
- Less Than
- Up To Day
- Up Thru Day
- Is Empty

If you mark the Check Box labeled Ignore Case , capitalization will be ignored in that parameter.

### .4.1.3.2 Content ID (R)

If you know part of the Content ID, enter it here and select the Radio Buttons 'Begins With' or 'Contains.' You might also want to check the 'Ignore Case' box.

For example, enter the letter 'A', click 'Begins With', then check 'Ignore Case,' click [Find] and your return would be ARTICLE_WRAP, api.schema.dhl, and ASK.

### .4.1.3.3 Content Type ID (drop-down box)

Leave blank unless you know the exact Content Type.

Content types might include:

- Document
- Annotation
- Content List
- Tree Root
- Graph Root
- Structure Node
- Structure Leaf
- Structure Definition (like DTD)
- Transformation Definition (like XSLT)
- Outline Node
- Page Node
- Sub Page Node
- Placeholder
- People
- Person
- Publish Point
- Department
- Topic

### .4.1.3.4 Owner Content ID (R)

If you have specified an Owner Content ID, search for it with this field.

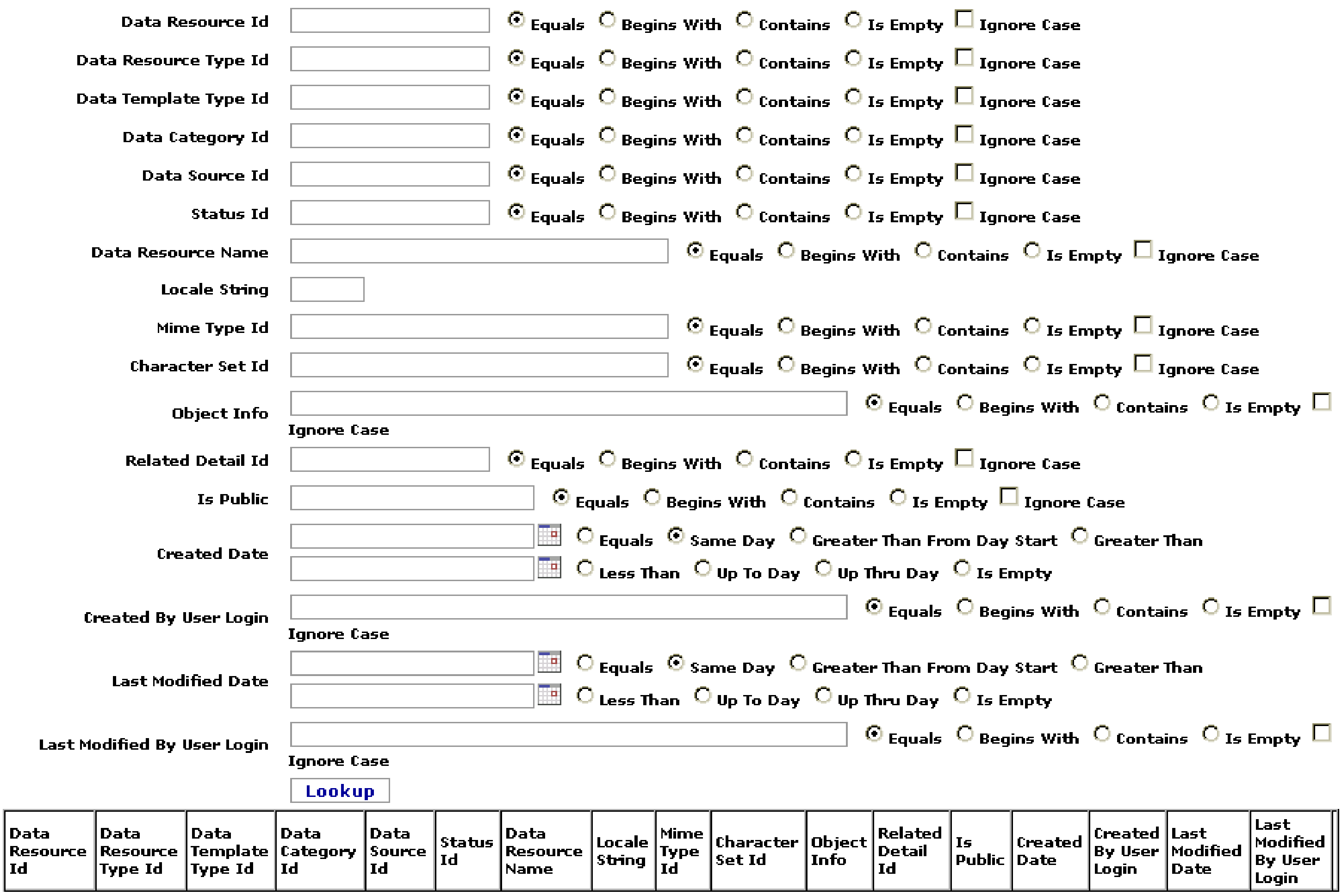
### .4.1.3.5 Instance Of Content ID (R)

Where the Content is being used.

### .4.1.3.6 Data Resource ID (popup screen)

Use the Popup screen to Content Manager > Lookup Data Resource to specify or you can just enter the exact Data Resource ID.

### .4.1.3.6.1 LookupDataRes-popup


Data Resource Id — Equals / Begins With / Contains / Is Empty / Ignore Case
Data Resource Type Id — Equals / Begins With / Contains / Is Empty / Ignore Case
Data Template Type Id — Equals / Begins With / Contains / Is Empty / Ignore Case
Data Category Id — Equals / Begins With / Contains / Is Empty / Ignore Case
Data Source Id — Equals / Begins With / Contains / Is Empty / Ignore Case
Status Id — Equals / Begins With / Contains / Is Empty / Ignore Case
Data Resource Name — Equals / Begins With / Contains / Is Empty / Ignore Case
Locale String
Mime Type Id — Equals / Begins With / Contains / Is Empty / Ignore Case
Character Set Id — Equals / Begins With / Contains / Is Empty / Ignore Case
Object Info — Equals / Begins With / Contains / Is Empty / Ignore Case
Related Detail Id — Equals / Begins With / Contains / Is Empty / Ignore Case
Is Public — Equals / Begins With / Contains / Is Empty / Ignore Case
Created Date — Equals / Same Day / Greater Than From Day Start / Greater Than / Less Than / Up To Day / Up Thru Day / Is Empty
Created By User Login — Equals / Begins With / Contains / Is Empty / Ignore Case
Last Modified Date — Equals / Same Day / Greater Than From Day Start / Greater Than / Less Than / Up To Day / Up Thru Day / Is Empty
Last Modified By User Login — Equals / Begins With / Contains / Is Empty / Ignore Case
Lookup

| Data Resource Id | Data Resource Type Id | Data Template Type Id | Data Category Id | Data Source Id | Status Id | Data Resource Name | Locale String | Mime Type Id | Character Set Id | Object Info | Related Detail Id | Is Public | Created Date | Created By User Login | Last Modified Date | Last Modified By User Login |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|

Basically the same screen you will find under the DataResource tab. See that for discussion.

## .4.1.3.7 Template Data Resource ID (R)

If you know all or part of the Template Data Resource ID, enter that and select the appropriate Radio button.

## .4.1.3.8 Data Source ID (R)

If you know all or part of the Data Source ID, enter that and select the appropriate Radio button.

## .4.1.3.9 Status ID (drop-down box)

Caution! If you select a status, but the Content you seek is recorded with a different status, the search will not return it. Specifically, if the item has NOT been marked as 'Not Applicable', entering that status here would preclude it from the search results.

This parameter might be used if there are several items of content with a similar ID and you are seeking to differentiate from among them by specifying a Status.

The named Status in the drop-down list might be slightly different from what shows in the results. For example, if you search for items with a 'Published' status, the returns could include content labeled 'BLOG_PUBLISHED.'

### .4.1.3.10 Privilege Enum ID (R)

If you know all or part of the Privilege Enum ID, enter that and select the appropriate Radio button.

### .4.1.3.11 Service Name (R)

If you know all or part of the Service Name, enter that and select the appropriate Radio button.

### .4.1.3.12 Content Name (R)

If you know all or part of the Content Name, enter that and select the appropriate Radio button.

### .4.1.3.13 Description (R)

If you know all or part of the Description, enter that and select the appropriate Radio button.

### .4.1.3.14 Locale String

Must be exact.

### .4.1.3.15 Mime Type ID (drop-down box)

Mime Type ID might include one of the following:

- Arbitrary Binary Data
- Postscript Application/Script
- ZIP Data
- Adobe Portable Document Format (PDF)
- Basic Audio
- MPEG Audio
- JPEG/JPG
- Image
- GIF Image
- TIFF Image

- PNF Image
- External Body Message
- HTTP Message
- HTTPS/S-HTTP Message
- News Message
- Partial Message
- RFC 822 Headered Message
- Mesh Model
- VRML Model
- Multiple Alternative Multipart
- Digest of Messages Multipart
- Encrypeted Multipart
- Form Data Multipart
- Mixed Type Multipart
- Related Multipart
- Signed
- Multipart
- Plain Text
- Enriched Text
- Rich Text
- RTF Rich Text
- Tab Separated Value Text
- CSS Text
- HTML Text
- SGML Text
- XML Text
- MPEG/MPG Video
- Quicktime Video

## .4.1.3.16 Character Set ID (R)

If you know all or part of the Character Set ID, enter that and select the appropriate Radio button.

## .4.1.3.17 Child Leaf Count

Contains two fields with associated Radio buttons: one for

- Equals
- Greater Than
- Greater Than Equals

The other Radio buttons for

- Less Than
- Less Than Equals
- Is Empty

### .4.1.3.18 Child Branch Count

Contains two fields with associated Radio buttons: one for

- Equals
- Greater Than
- Greater Than Equals

The other Radio buttons for

- Less Than
- Less Than Equals
- Is Empty

### .4.1.3.19 Created Date

Contains two popup calendars with associated Radio buttons: one for

- Equals
- Same Day
- Greater
- Than From Day Start
- Greater Than

The other calendar with Radio buttons for

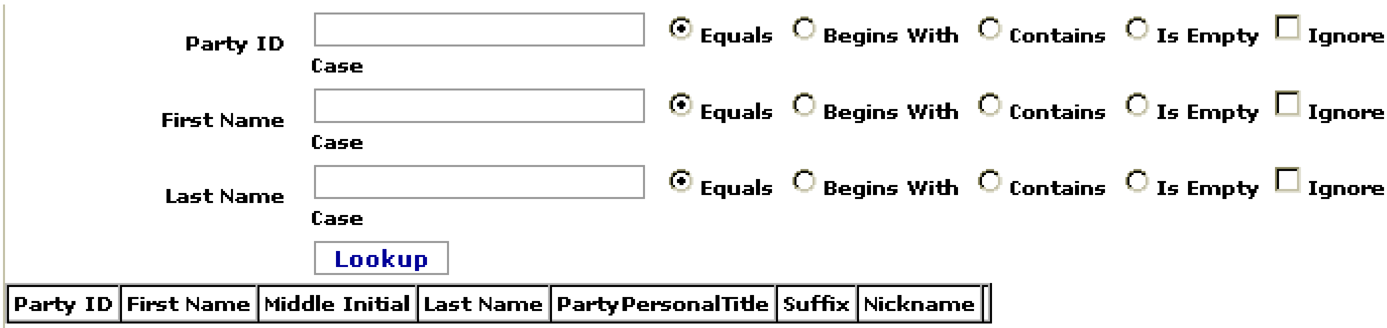
- Less Than
- Up To Day
- Up Thru Day
- Is Empty

### .4.1.3.20 Created By User Login (popup search tool)

Popup to Party Manager > Lookup Person screen.

If you enter part of the User ID, say just the first 3 numbers, it will return all Parties whose ID starts with those numbers.

### .4.1.3.20.1 LookupPerson-popup




Popup to search for Party ID by name or partial ID.

### .4.1.3.21 Last Modified Date

Contains two popup calendars with associated Radio buttons; bracket the expected date (select one earlier and one later), and it will return all Content modified between those dates. Of course, if you know the exact date, simply enter that one only and select Equals. The difficulty there is that the entered date includes time down to thousandths of a second. You are better off using buttons other than Equals.

### .4.1.3.22 Last Modified By User Login

Popup to Party Manager > Lookup Person screen. Same screen as used in the Created By User Login popup; see above.

## .4.1.4 Table of Found Content

### .4.1.4.1 Discussion of Content Table

Following a successful search, only those items matching the parameters of your search will be displayed in this table. For example, if you knew that the content begins with STD..., enter STD in the search engine ID field and select the Radio Button 'Begins With'. The table would then display all IDs beginning with STD, in this case showing only STDWRAP001.

Only 20 items are displayed on the screen; click on [Next] in the lower LH corner of the screen to see the next 20 items.

Click on the ID under the Edit column to begin working with the selected Content.

### .4.1.4.2 Edit

Takes you to the Content Manager > Content screen, populated with existing data for this item.

### .4.1.4.3 Content Type ID

The term describing what type of Content this is. Content types might include:

- Document
- Annotation
- Content List
- Tree Root
- Graph Root
- Structure Node
- Structure Leaf
- Structure
- Definition (like DTD)
- Transformation Definition (like XSLT)
- Outline Node
- Page
- Node
- Sub Page Node
- Placeholder
- People
- Person
- Publish Point
- Department
- Topic

### .4.1.4.4 Owner Content ID

Which major (or larger) Content this item is part of.

### .4.1.4.5 Instance Of Content ID

Where this might be found.

### .4.1.4.6 Data Resource ID

Where this item exists as a Data Resource, what ID is it assigned there.

### .4.1.4.7 Template Data Resource ID

If based upon or part of a Template, what is that Data Resource ID.

### .4.1.4.8 Data Source ID

What is the source of the Data used in this Content.

### .4.1.4.9 Status ID

From creation through approval and publication, what is the current Status of this Content.

### .4.1.4.10 Privilege Enum ID

If assigned a Privilege Enum, here is that identity.

### .4.1.4.11 Service Name

Name for a particular Service that the Content may be associated with.

### .4.1.4.12 Content Name

The working name by which the Content is called within your company environment.

### .4.1.4.13 Description

What is this Content, what is it for, what does it do?

### .4.1.4.14 Locale String

Where the Content can be found on a server, a network or a storage device.

### .4.1.4.15 Mime Type ID

Mime Type ID might include one of the following:

- Arbitrary Binary Data
- Postscript Application/Script
- ZIP Data
- Adobe Portable Document Format (PDF)
- Basic Audio
- MPEG Audio

- JPEG/JPG
- Image
- GIF Image
- TIFF Image
- PNF Image
- External Body Message
- HTTP Message
- HTTPS/S-HTTP Message
- News Message
- Partial Message
- RFC 822 Headered Message
- Mesh Model
- VRML Model
- Multiple Alternative Multipart
- Digest of Messages Multipart
- Encrypeted Multipart
- Form Data Multipart
- Mixed Type Multipart
- Related Multipart
- Signed
- Multipart
- Plain Text
- Enriched Text
- Rich Text
- RTF Rich Text
- Tab Separated Value Text
- CSS Text
- HTML Text
- SGML Text
- XML Text
- MPEG/MPG Video
- Quicktime Video

## .4.1.4.16 Character Set ID

If there is a Character Set, the ID may be given here.

## .4.1.4.17 Child Leaf Count

How many Child Leaf items stem from this Content.

#### .4.1.4.18 Child Branch Count

How many Child Branch items stem from this Content.

#### .4.1.4.19 Created Date

When the Content was created or entered into the system.

#### .4.1.4.20 Created By User Login

Who created this Content or entered it into the system.

#### .4.1.4.21 Last Modified Date

When was this Content last modified.

#### .4.1.4.22 Last Modified By User Login

Who last modified this Content.

### .4.1.5 Create New

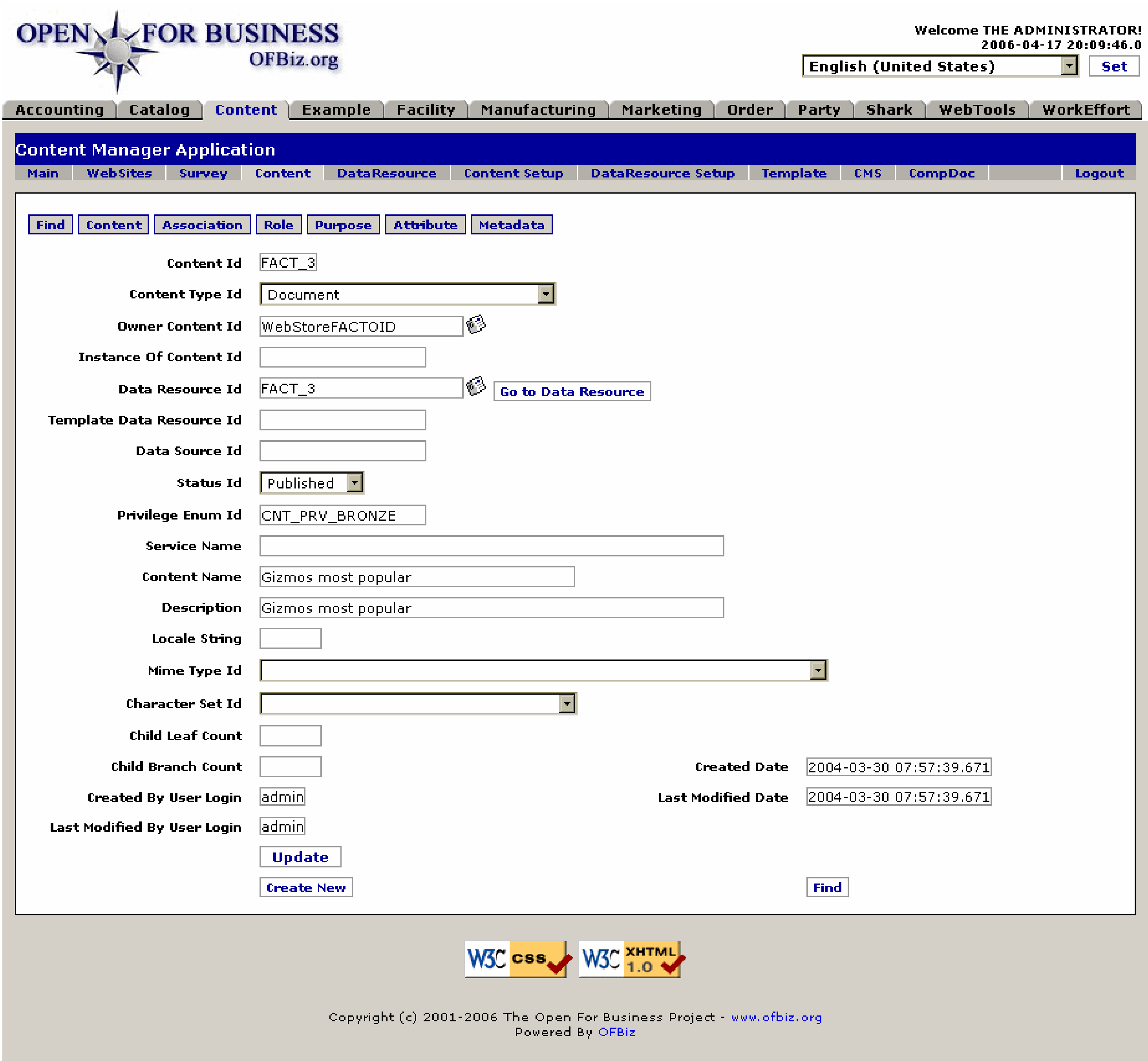
For the [Create New] link, see Content > Content > Create New.

## .4.2 Content

### .4.2.1 Update

Update content as selected from the Find screen.

## .4.2.1.1 EditContent




Selected Content is edited at this screen.

## .4.2.1.3 Presentation varies

The appearance of these screens is highly dependent upon the items selected; you may have different presentations than what are discussed here.

### .4.2.1.4 Content ID

This will be populated for the selected Content ID; it cannot be changed without creating a new Content with a different ID.

### .4.2.1.5 Content Type ID (drop-down box)

Content types might include:

- —
- Document
- Template or Form
- Annotation
- Content
- List
- Tree Root
- Graph Root
- Structure Node
- Structure Leaf
- Structure Definition (like
- DTD)
- Transformation Definition (like XSLT)
- Outline Node
- Page Node
- Sub Page
- Node
- Place Holder
- People
- Person
- Publish Point
- Department
- Topic
- Composite
- Document Template
- Composite Document Instance

### .4.2.1.6 Owner Content ID (popup screen)

Popup with the same functions and table as Content Manager > Lookup (Find) Content screen as discussed under Find, above.

### .4.2.1.7 Data Resource ID (popup screen)

Popup to Content Manager > Lookup Data Resource screen.

#### .4.2.1.7.1 LookupDataRes-popup

| | | |
|---|---|---|
| Data Resource Id | | Equals ◉ Begins With ○ Contains ○ Is Empty ○ |
| Data Resource Type Id | | Equals ◉ Begins With ○ Contains ○ Is Empty ○ |
| Data Template Type Id | | Equals ◉ Begins With ○ Contains ○ Is Empty ○ |
| Data Category Id | | Equals ◉ Begins With ○ Contains ○ Is Empty ○ |
| Data Source Id | | Equals ◉ Begins With ○ Contains ○ Is Empty ○ |
| Status Id | | Equals ◉ Begins With ○ Contains ○ Is Empty ○ |
| Data Resource Name | | Equals ◉ Begins With ○ Contains ○ Is Empty ○ |
| Locale String | | |
| Mime Type Id | | Equals ◉ Begins With ○ Contains ○ Is Empty ○ |
| Character Set Id | | Equals ◉ Begins With ○ Contains ○ Is Empty ○ |
| Object Info | | Equals ◉ Begins With ○ Contains ○ Is Empty ○ |
| Created Date | | Equals ○ Same Day ◉ Greater Than From Day Start ○ Greater Than ○ Less Than ○ Up To Day ○ Up Thru Day ○ Is Empty ○ |
| Created By User Login | | Equals ◉ Begins With ○ Contains ○ Is Empty ○ |
| Last Modified Date | | Equals ○ Same Day ◉ Greater Than From Day Start ○ Greater Than ○ Less Than ○ Up To Day ○ Up Thru Day ○ Is Empty ○ |
| Last Modified By User Login | | Equals ◉ Begins With ○ Contains ○ Is Empty ○ |

Lookup

| | Data Resource Type Id | Data Template Type Id | Data Category Id | Data Source Id | Status Id | Data Resource Name | Locale String | Mime Type Id | Character Set Id | Object Info |
|---|---|---|---|---|---|---|---|---|---|---|
| STDWRAP001 | ELECTRONIC_TEXT | FTL | | | | Standard SubContent Wrapper | | text/html | | |
| WRAP_STD_LOOP | ELECTRONIC_TEXT | FTL | | | | Loop Wrap | | text/html | | |
| AFIBC_LOGO | IMAGE_OBJECT | NONE | | | | SFIBC Logo | | | | sfibc_logo.png |
| AGEP_LOGO | IMAGE_OBJECT | NONE | | | | AGEP Logo | | | | agep_logo.png |
| AGINC_LOGO | IMAGE_OBJECT | NONE | | | | AGINC Logo | | | | aginc_logo.png |
| ARTICLE_WRAP | OFBIZ_FILE | FTL | | | | | | | | /hot-deploy/blog/webapp/blog |
| LEFTBAR | CONTEXT_FILE | FTL | | | | Left Bar | | | | /leftbar.ftl |
| RIGHTBAR | ELECTRONIC_TEXT | FTL | | | | Right Bar | | | | RIGHT BAR |
| RP_MEDAL | IMAGE_OBJECT | NONE | | | | Project Reliance Medallion Logo | | | | pr_medal.png |
| TMPLT_IMG_CENTER | ELECTRONIC_TEXT | FTL | | | | Image Centered | | text/html | | |
| TEMPLATE_IMAGE_LEFT | ELECTRONIC_TEXT | FTL | | | | Image Left | | text/html | | |
| TEMPLATE_TEXT_ONLY | ELECTRONIC_TEXT | FTL | | | | Template Text | | text/html | | |
| VIEW_WRAP | OFBIZ_FILE | FTL | | | | | | | | /hot-deploy/blog/webapp/blog |
| WRAP_ARTICLE | ELECTRONIC_TEXT | FTL | | | | | | | | |

### .4.2.1.8 Instance Of Content ID

Where the Content is used.

### .4.2.1.9 Template Data Resource ID

If based upon or part of a Template, what is that Data Resource ID.

### .4.2.1.10 Data Source ID

What was the original source of the Data.

### .4.2.1.11 Status ID (drop-down box)

What is the current Status of this Content? Choices generally include the following:

- —
- Draft
- Published
- Submitted
- Rejected

### .4.2.1.12 Privilege Enum ID

The Privilege Enumerator.

### .4.2.1.13 Service Name

If associated with a Service, it is named here.

### .4.2.1.14 Content Name

What this Content is called within the company.

### .4.2.1.15 Description

What the Content actually does or is for.

## .4.2.1.16 Locale String

The path to where the Content actually resides (in electronic format) within a network or on a server.

## .4.2.1.17 Mime Type ID (drop-down box)

Mime Type ID might include one of the following:

- application/msword - Microsoft Word
- application/octet-stream - Arbitrary Binary Data
- application/pdf - Adobe Portable Document Format (PDF)
- application/postscript - Postscript Application/Script
- application/vnd.oasis.opendocument.text -
- OpenOfficeDocument Text
- application/vnd.ofbiz.survey - Survey
- application/vnd.ofbiz.survey.response -
- Survey Response
- application/zip - ZIP Data
- audio/basic - Basic Audio
- audio/mpeg - MPEG Audio
- image/gif - GIF Image
- image/jpeg - JPEG/JPG Image
- image/png - PNG Image
- image/tiff -
- TIFF Image
- message/external body - External Body Message
- message/http - HTTP Message
- message/news - News Message
- message/partial - Partial Message
- message/rfc822 - RFC 822
- Headered Message
- message/s-http - HTTPS/S-HTTP Message
- model/mesh - Mesh Model
- model/vrml - VRML Model
- multipart/alternative - Multiple Alternative Multipart
- multipart/digest - Digest of
- Messages Multipart
- multipart/encrypted - Encrypeted Multipart
- multipart/form - Form Data Multipart
- multipart/mixed - Mixed Type Multipart
- multipart/related - Related Multipart
- multipart/signed - Signed
- Multipart

- text/css - CSS Text
- text/enriched - Enriched Text
- text/html - HTML Text
- text/plain -
- Plain Text
- text/rich - Rich Text
- text/rtf - RTF Rich Text
- text/sgml - SGML Text
- text/tab-separated-values - Tab Separated Value Text
- text/xml - XML Text
- video/mpeg - MPEG/MPG
- Video
- video/quicktime - Quicktime Video

## .4.2.1.18 Character Set ID (drop-down box)

If Content is associated with a Character Set, identify it here. Character Set ID might be one of the following:

- ISO-8859-1 English
- ISO-8859-2 ?
- ISO-8859-3 ?
- ISO-8859-4 ?
- ISO-8859-5 ?
- ISO-8859-6 Latin/Arabic
- ISO-8859-7 ?
- ISO-8859-8 Lating/Hebrew
- ISO-8859-9 ?
- ISO-8859-10
- ?
- US-ASCII as defined in ANSI X3.4-1986
- Unicode 8 bit
- Unicode 16 bit

## .4.2.1.19 Child Leaf Count

The number of Child Leaf items coming from this Content.

## .4.2.1.20 Child Branch Count

The number of Child Branch items coming from this Content.

### .4.2.1.21 Created by User Login

Which Party created or entered the Content ID into the system.

### .4.2.1.22 Created Date

When the Content was created or entered into the system.

### .4.2.1.23 Last Modified by User Login

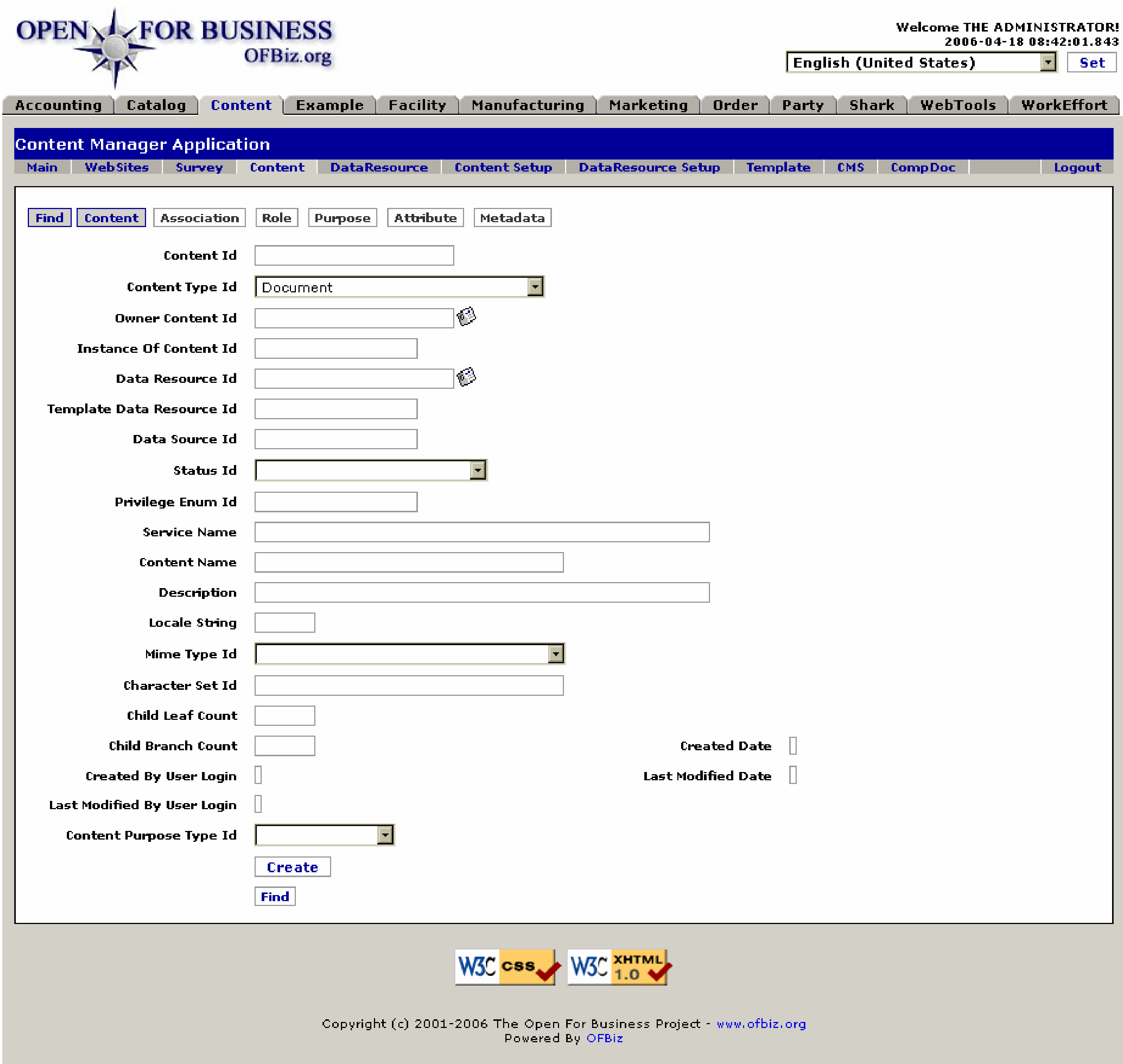
Which Party last changed the Content.

### .4.2.1.24 Last Modified Date

When the Content was last changed.

### .4.2.2 Create new Content item

#### .4.2.2.1 AddContent-new




This screen has the same fields as Edit Content, discussed above. The only difference is the link to [Create] rather than [Update].

#### .4.2.2.2 link buttons

[Create] [Find] [Find] [Content]

#### .4.2.2.3 Discussion

The fields for Create New are the same as Edit Content, so the explanation of the fields will not be repeated here.

See 'Update' above for the matching fields.

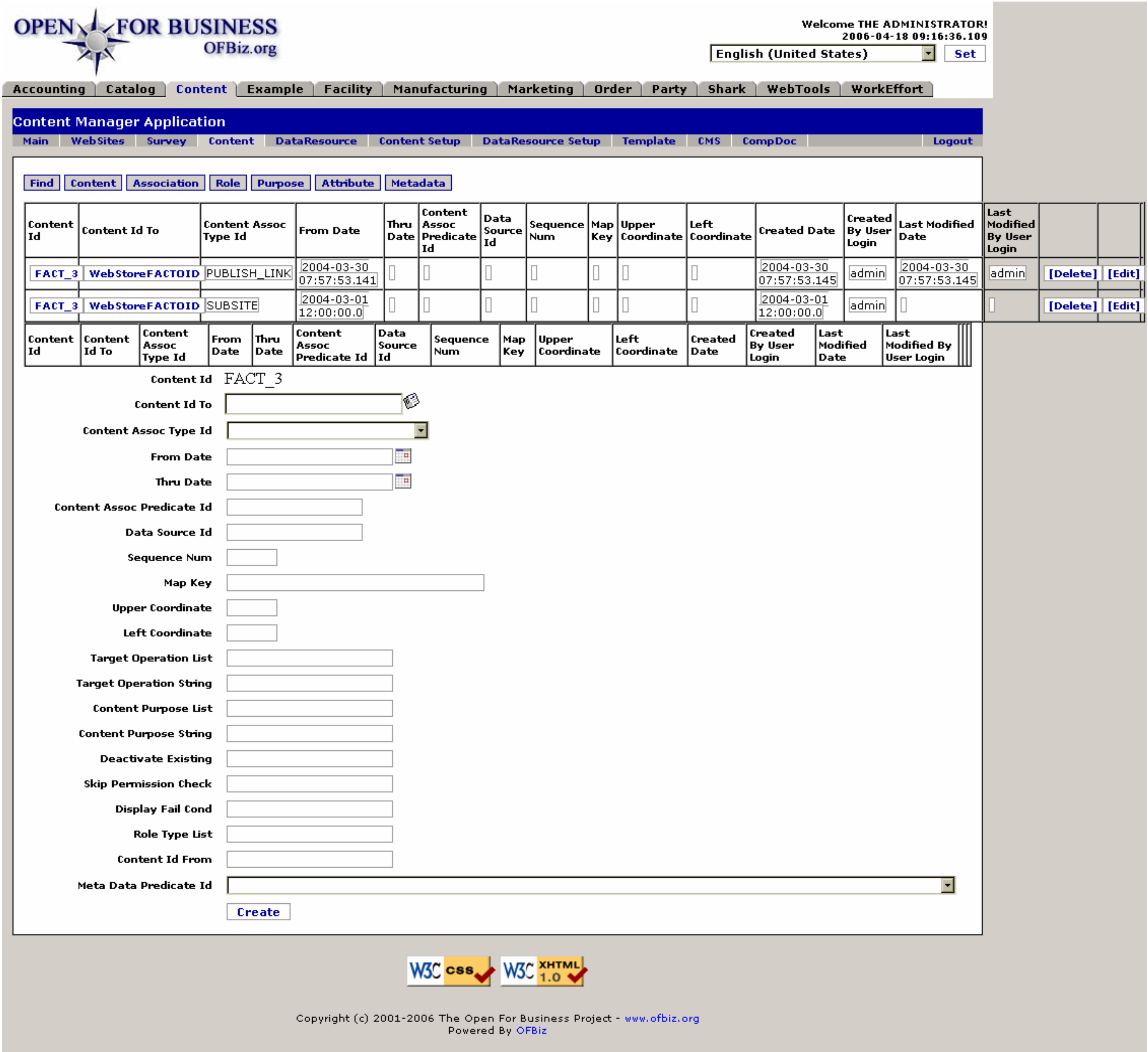
## .4.3 Association

### .4.3.1 Discussion

Associations are relative to the content previously selected.

In the two tables shown, the table at the top is for associations FROM THIS CONTENT TO another. The lower table shows associations TO THIS CONTENT FROM another.

## .4.3.2 EditContentAssoc




Existing Associations from and to other Content is shown. New Associations are established with the tool below.

## .4.3.3 link buttons

[Delete] [Edit] [Create] [Find] [Content] [Association] [Role] [Purpose] [Attribute] [Metadata]

## .4.3.4 From this Content TO:

This table contains details of the Content to which the selected content is related as a Child. Explanation of the fields has either been given above, or is explained under the tool to create a new relationship, below.

## .4.3.5 To this Content FROM:

This table contains details of the Content to which the selected content is related as a Parent. Explanation of the fields has either been given above, or is explained under the tool to create a new relationship, below.

## .4.3.6 Tool to establish associations

### .4.3.6.1 Content ID

This is the selected Content; it cannot be changed.

### .4.3.6.2 Content ID To (popup screen)

Popup to Content Manager > Lookup (Find) Content screen.

Popup only appears the first time this Content is brought to the Associations screen. Once an association is established, only the established Content is shown.

### .4.3.6.3 Content Assoc Type ID (drop-down box)

Drop-down box only appears the first time this Content is brought to the Associations screen. Once an association is established, only the established Content Assoc Type ID is shown. Select from the among the following on the drop-down list:

- Template Member
- Document Structure Definition
- Transformation Definition
- List Entry
- Tree Child
- Graph Link
- Alternate Locale
- Response
- Sub Section
- Topic
- Description
- Subsite

- Department
- Related content
- Publish link
- Attribute
- Author
- Summary
- Composite Document Part
- Instance Of

## .4.3.6.4 From Date (popup calendar)

Popup calendar only appears the first time this Content is brought to the Associations screen. Once an association is established, only the established date is shown.

Defaults to Now. Enter a different date if documenting an earlier creation date or a later effectivity date.

## .4.3.6.5 Thru Date (popup calendar)

If this Content Association will expire at at future date and time, enter that here; otherwise leave blank.

## .4.3.6.6 Content Assoc Predicate ID

If a Predicate for this Content Association is known, enter that ID here.

## .4.3.6.7 Data Source ID

If there is a known or established source for the Data, enter its ID here.

## .4.3.6.8 Sequence Num

If there is a sequencing system in place, the Sequence Number goes here.

## .4.3.6.9 Map Key

Enter the Map Key for a graphic insertion here.

## .4.3.6.10 Upper Coordinate

For positioning an item on the screen or within a graphic, enter the Upper pixel Coordinate here.

### .4.3.6.11 Left Coordinate

For positioning an item on the screen or within a graphic, enter the Left pixel Coordinate here.

### .4.3.6.12 Target Operation List

If this Document Association is part of an Operation, the name of List which is the Target for the operation can go here.

### .4.3.6.13 Target Operation String

Address String where the Target Operation is kept.

### .4.3.6.14 Content Purpose List

List of the Purposes assigned to the Content.

### .4.3.6.15 Content Purpose String

The address String where the Content Purpose is located.

### .4.3.6.16 Deactivate Existing

Whether existing Associations need to be deactivated with the creation of this new Association.

### .4.3.6.17 Skip Permission Check

Whether the Permission Check routine should be skipped for the implementation of this new association.

### .4.3.6.18 Display Fail Cond

What message to display when a Fail Condition exists, resulting from the attempt to implement this new association.

### .4.3.6.19 Role Type List

Which Role Type List is referenced for this Content association.

## .4.3.6.20 Content Id From

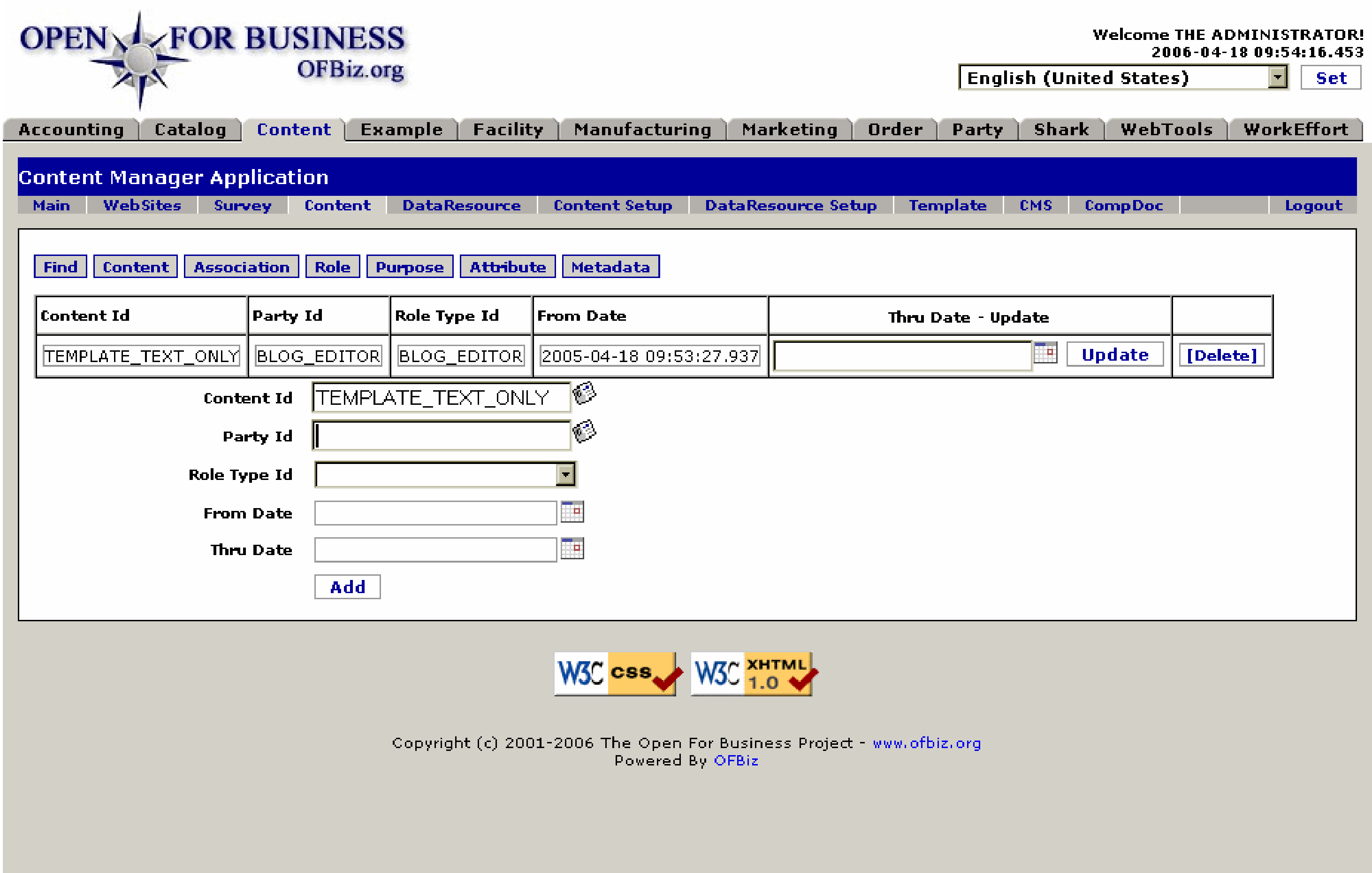
This Association is creating a new child. What this field does is confirm the Parent of the Content being associated.

## .4.3.6.21 Meta Data Predicate ID (drop-down list)

Select the appropriate Meta Data Predicate from the drop-down list.

# .4.4 Role

## .4.4.1 EditContentRole




Party Roles and their relationship with the Content are added or deleted here. Expiration date can be updated.

## .4.4.2 link buttons

[Update] [Delete] [Add] [Find] [Content] [Association] [Role] [Purpose] [Attribute] [Metadata]

## .4.4.3 Table

Table of established Content Roles.

### .4.4.3.1 Content ID

The assigned ID, sometimes matching the name, of this Content.

### .4.4.3.2 Party ID

The identification of the Party assigned a Role with this Content.

### .4.4.3.3 Role Type ID

The assigned Role of the Party in relation to this Content.

### .4.4.3.4 From Date

When the Role for the Party was assigned.

### .4.4.3.5 Thru Date (popup calendar)

When the Role for this Party will terminate, if ever. This termination date can be edited or assigned at any time within the table without recreating the Role assignment.

## .4.4.4 Tool

Tool to add Content Role.

### .4.4.4.1 Content ID (popup screen)

Popup to Content Manager > Lookup (Find) Content screen.

### .4.4.4.2 Party ID (popup screen)

Popup to Party Manager > Lookup (Find) Person screen.

### .4.4.4.3 Role Type ID (drop-down box)

Select the Role to be played by the assigned Party for this content.

### .4.4.4.4 From Date (calendar popup)

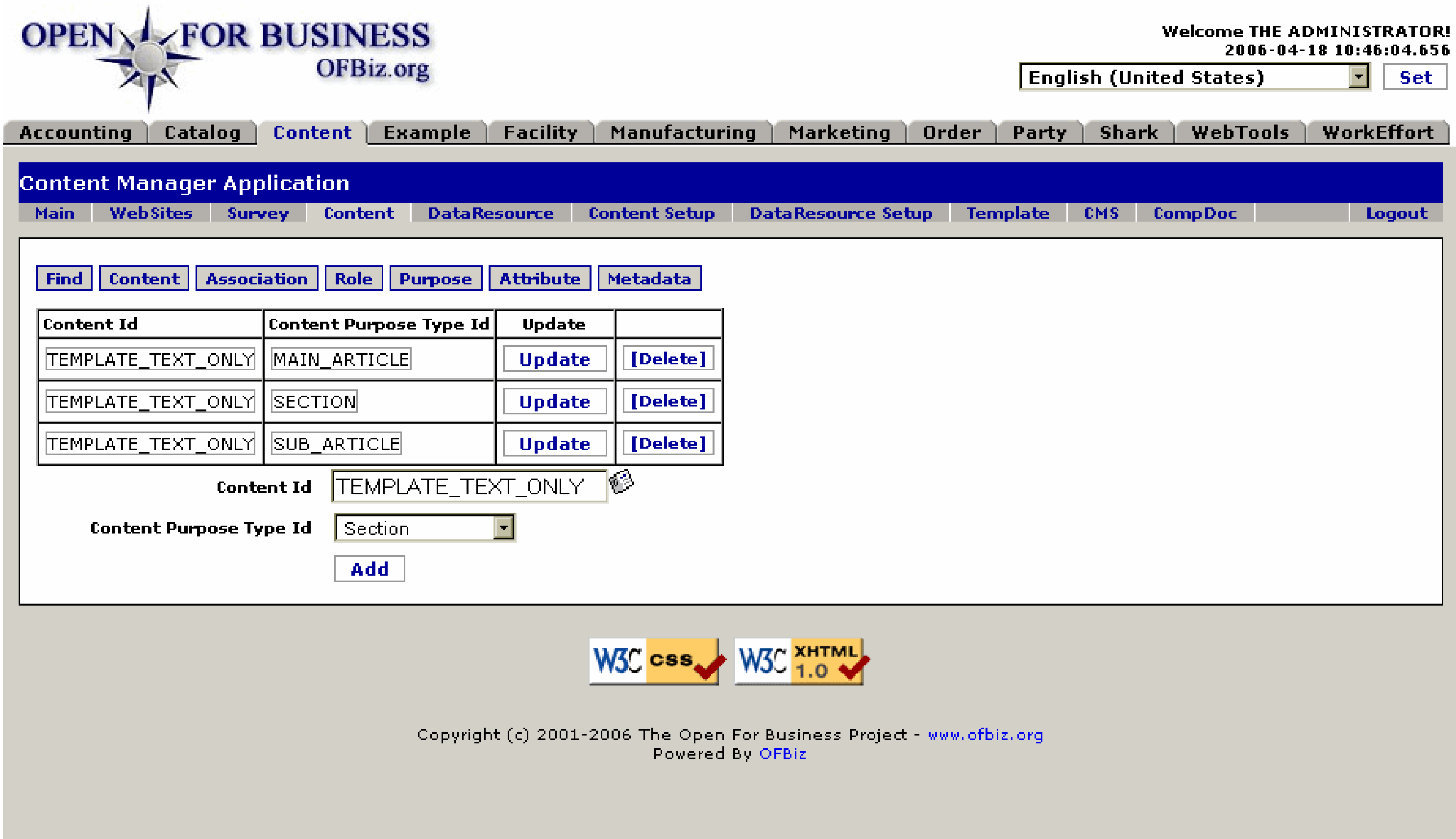
Defaults to Now. Can be an earlier date if this is an historical entry or a future date if the assignment will not be effective until later.

### .4.4.4.5 Thru Date (calendar popup)

Optional. Unless the assignment needs to end at a certain future time, leave blank. This can always be edited in later in the table.

## .4.5 Purpose

## .4.5.1 EditContentPurpose




Purpose for the Content is established, updated or deleted from here.

## .4.5.2 link buttons

[Update] [Delete] [Add] [Find] [Content] [Association] [Role] [Purpose] [Attribute] [Metadata]

## .4.5.3 Table

Table of existing Content Purpose Type IDs.

### .4.5.3.1 Content ID

The ID of the Content to which a purpose has been assigned.

### .4.5.3.2 Content Purpose Type ID

The ID of the assigned Content Purpose Type.

## .4.5.4 Tool for establishing Content Purpose

### .4.5.4.1 Content ID (popup screen)

Popup to Content Manager > Lookup (Find) Content screen.

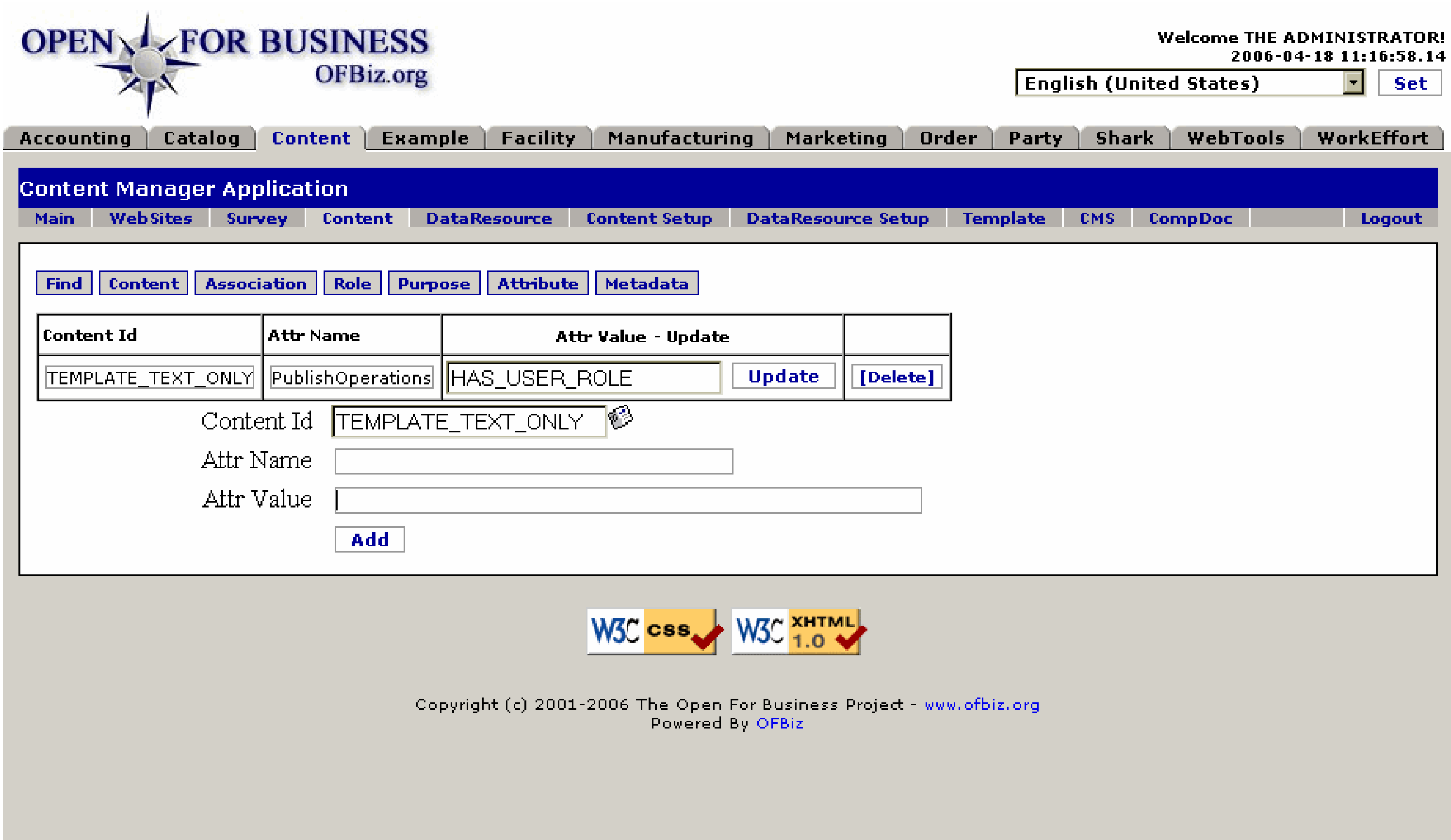
### .4.5.4.2 Content Purpose Type ID (drop-down box)

Types of Purposes might include:

- Article
- Message
- Feedback
- Comment
- Product Info
- Company Info
- Advertisement
- General Info
- Description
- Owner
- Response
- Not
- Applicable
- Section
- Topic
- Summary
- Main Content
- Sub Content
- User
- FAQ
- General Source

## .4.6 Attribute

### .4.6.1 EditContentAttribute




Attributes of the Content are assigned and updated here. Delete when no longer applicable.

### .4.6.2 link buttons

[Update] [Delete] [Add] [Find] [Content] [Association] [Role] [Purpose] [Attribute] [Metadata]

### .4.6.3 Table

Table of existing Attributes.

#### .4.6.3.1 Content ID

The Content which carries the attributes given here in this row of the table.

### .4.6.3.2 Attr Name

The assigned Name of the Attribute.

### .4.6.3.3 Attr Value

The assigned Value for the Attribute.

## .4.6.4 Tool

Tool to attach Attributes to Content ID.

### .4.6.4.1 Content ID (popup search tool)

Use the popup search tool to locate a different Content ID.

### .4.6.4.2 Attr Name

Enter a name for the Attribute being assigned.

### .4.6.4.3 Attr Value

Indicate the Value related with the assigned Attribute.

## .4.7 MetaData

### .4.7.1 EditContentMetaData

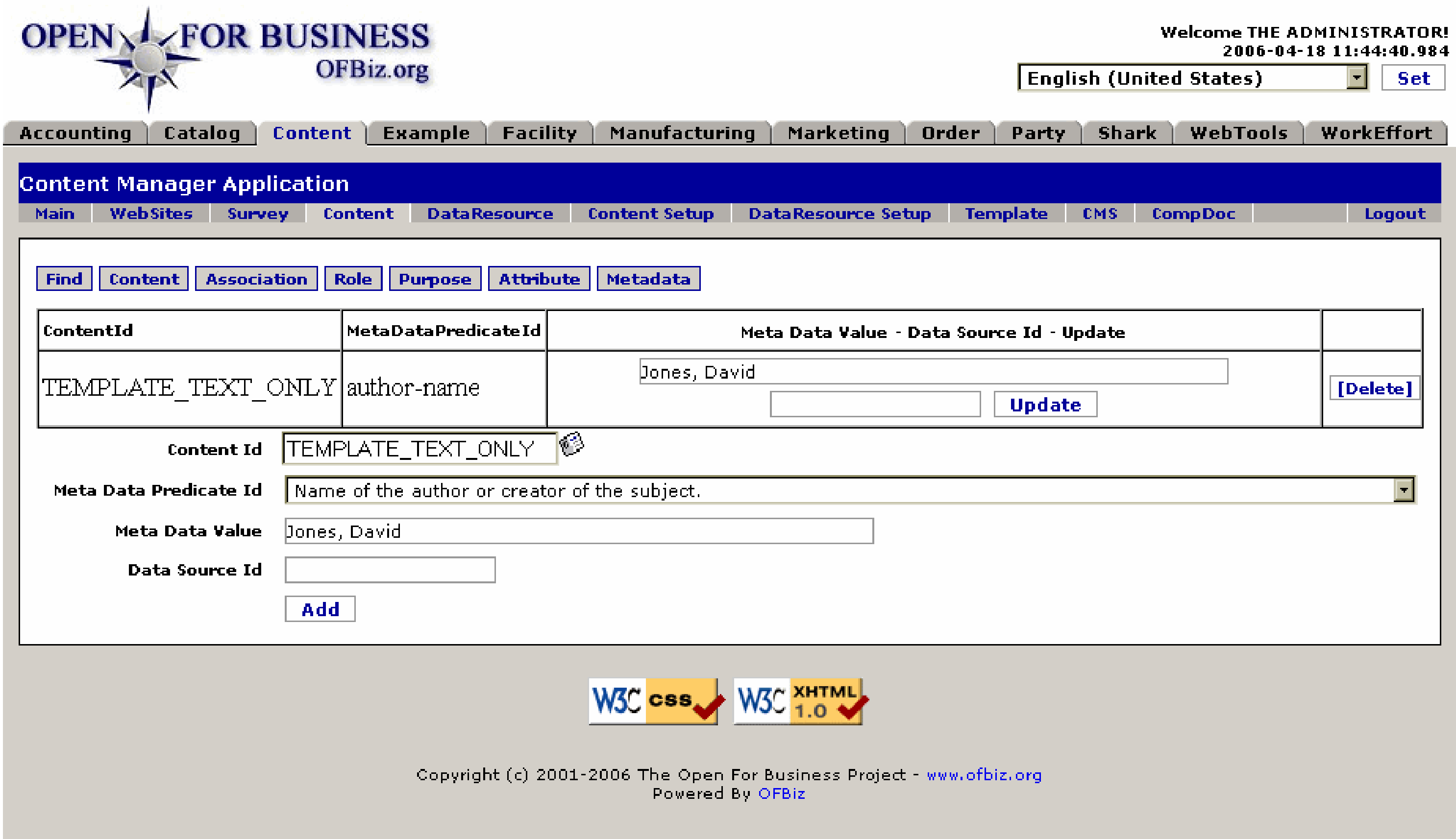



Table of existing MetaData and the tool to associate new MetaData.

### .4.7.2 link buttons

[Update] [Delete] [Add] [Find] [Content] [Association] [Role] [Purpose] [Attribute] [Metadata]

### .4.7.3 Table

Table of existing ContentMetaData.

#### .4.7.3.1 ContentID

You cannot click here to edit the Content. You can only change the Value or the Source ID within the row to the right of this ID.

### .4.7.3.2 MetaDataPredicate ID

This is the ID of the Predicate that is being considered in this row.

### .4.7.3.3 Meta Data Value

You may enter a value to update in this column.

### .4.7.3.4 Data Source ID

You may indicate the Data Source in this column by ID.

## .4.7.4 Tool

Tool to add ContentMetaData.

### .4.7.4.1 ContentID (popup search tool)

Use the search tool, if needed, to identify the Content ID.

### .4.7.4.2 MetaDataPredicate ID (drop-down box)

The MetaData Predicate is selected from the drop-down box.

### .4.7.4.3 Meta Data Value

Enter the value here.

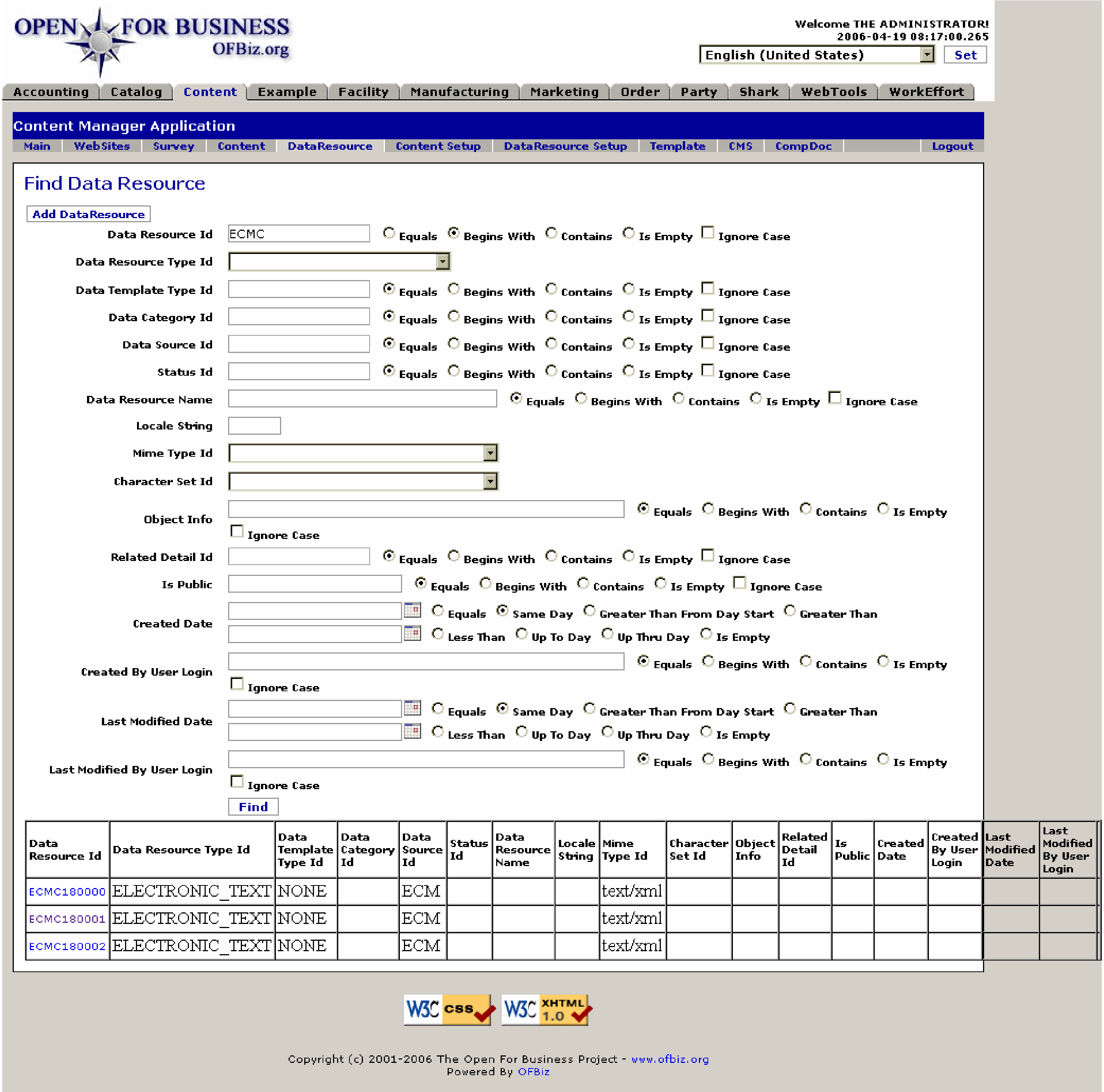
### .4.7.4.4 Data Source ID

Optional, but you may specify the Source of the Data here by its ID.

# .5 DataResource

## .5.1 Find

### .5.1.1 FindDataResource




Data Resource opens with this screen. Search results are given in the table beneath the search tool, above.

## .5.1.2 link buttons

[Find]

## .5.1.3 Search section

### .5.1.3.1 Data Resource ID

If you know the the exact ID, enter it and leave the radio button on Equals. Otherwise, if you know a part of it, select from one of the other radio buttons.

Has radio buttons for: Equals/ Begins With/ Contains/ Is Empty.

Also contains a checkbox; check this if you wish the search to disregard the case (UPPER CASE/lower case) of the titles or IDs.

### .5.1.3.2 Data Resource Type ID (drop-down box)

Select from the drop-down box. Choices might include:

- Local file
- File (rel to OFBIZ_HOME)
- File (rel to webapp root)
- Local Binary File
- Binary File (rel to OFBIZ_HOME)
- Binary File (rel to webapp root)
- Hyperlink
- URL Resource
- Short Text
- Long
- Text
- Image
- Other
- Survey
- Survey Response

### .5.1.3.3 Data Template Type ID

If this is your search criteria, enter what you know, then select from among the radio buttons for:

Equals/ Begins With/ Contains/ Is Empty.

Also contains a checkbox; check this if you wish the search to disregard the case (UPPER CASE/lower case) of the titles or IDs.

Choices might include:

- No Template

- FreeMarker
- Velocity
- WebMacro
- XSLT
- Screen widget

### .5.1.3.4 Data Category ID

Radio buttons for: Equals/ Begins With/ Contains/ Is Empty.

Also contains a checkbox; check this if you wish the search to disregard the case (UPPER CASE/lower case) of the titles or IDs.

### .5.1.3.5 Data Source ID

Radio buttons for: Equals/ Begins With/ Contains/ Is Empty.

Also contains a checkbox; check this if you wish the search to disregard the case (UPPER CASE/lower case) of the titles or IDs.

If there is an identifiable source for this Resource, you may specify it here.

### .5.1.3.6 Status ID

Radio buttons for: Equals/ Begins With/ Contains/ Is Empty.

Also contains a checkbox; check this if you wish the search to disregard the case (UPPER CASE/lower case) of the titles or IDs.

Choices might be one of the following:

- In Progress
- Initial Draft
- Revised Draft
- Final Draft
- Published
- Deactivated

### .5.1.3.7 Data Resource Name

Radio buttons for: Equals/ Begins With/ Contains/ Is Empty.

Also contains a checkbox; check this if you wish the search to disregard the case (UPPER CASE/lower case) of the titles or IDs.

This is what the Resource is known by to those who work with it. It may be the same as the Resource ID, but generally would be more casual and more descriptive.

## .5.1.3.8 Locale String

Where the electronic resource exists.

## .5.1.3.9 Mime Type ID (drop-down box)

Mime Type ID might include one of the following:

- Arbitrary Binary Data
- Postscript Application/Script
- ZIP Data
- Adobe Portable Document Format (PDF)
- Microsoft Word
- OpenOffice
- OpenDocument Text
- Survey
- Survey Response
- Basic Audio
- MPEG Audio
- JPEG/JPG
- Image
- GIF Image
- TIFF Image
- PNG Image
- External Body Message
- HTTP Message
- HTTPS/S-HTTP Message
- News Message
- Partial Message
- RFC 822 Headered Message
- Mesh Model
- VRML Model
- Multiple Alternative Multipart
- Digest of Messages Multipart
- Encrypeted Multipart
- Form Data Multipart
- Mixed Type Multipart
- Related Multipart
- Signed
- Multipart
- Plain Text
- Enriched Text
- Rich Text

- RTF Rich Text
- Tab Separated Value Text
- CSS Text
- HTML Text
- SGML Text
- XML Text
- MPEG/MPG Video
- QuickTime Video

## .5.1.3.10 Character Set ID (drop-down box)

Select from the drop-down box which of the ISO, ASCII or Unicode character sets is used.

## .5.1.3.11 Object Info

Radio buttons for: Equals/ Begins With/ Contains/ Is Empty.

Also contains a checkbox; check this if you wish the search to disregard the case (UPPER CASE/lower case) of the titles or IDs. Any other Information about the Object which may be usefully related to the sought-for Resource.

## .5.1.3.12 Created Date

Unless you know the exact date AND TIME when the Data Resource was created, it is best to search on a range of dates/times. Choose the first to be the earliest possible and the second to be the latest possible, then select the appropriate radio buttons.

Contains two popup calendars with associated radio buttons: one for

- Equals
- Same Day
- Greater Than From Day Start
- Greater Than

The other calendar with Radio

- buttons for
- Less Than
- Up To Day
- Up Thru Day
- Is Empty

### .5.1.3.13 Created By User Login

Radio buttons for: Equals/ Begins With/ Contains/ Is Empty.

Also contains a checkbox; check this if you wish the search to disregard the case (UPPER CASE/lower case) of the user logins.

### .5.1.3.14 Last Modified Date

Unless you know the exact date AND TIME when the Data Resource was last modified, it is best to search on a range of dates/times. Choose the first to be the earliest possible and the second to be the latest possible, then select the appropriate radio buttons. Contains two popup calendars with associated radio buttons: one for

- Equals
- Same Day
- Greater Than From Day Start< br> Greater Than

The other calendar with Radio buttons for

- Less Than
- Up To Day
- Up Thru Day
- Is Empty

### .5.1.3.15 Last Modified By User Login

Radio buttons for: Equals/ Begins With/ Contains/ Is Empty.

Also contains a checkbox; check this if you wish

the search to disregard the case (UPPER CASE/lower case) of the user logins.

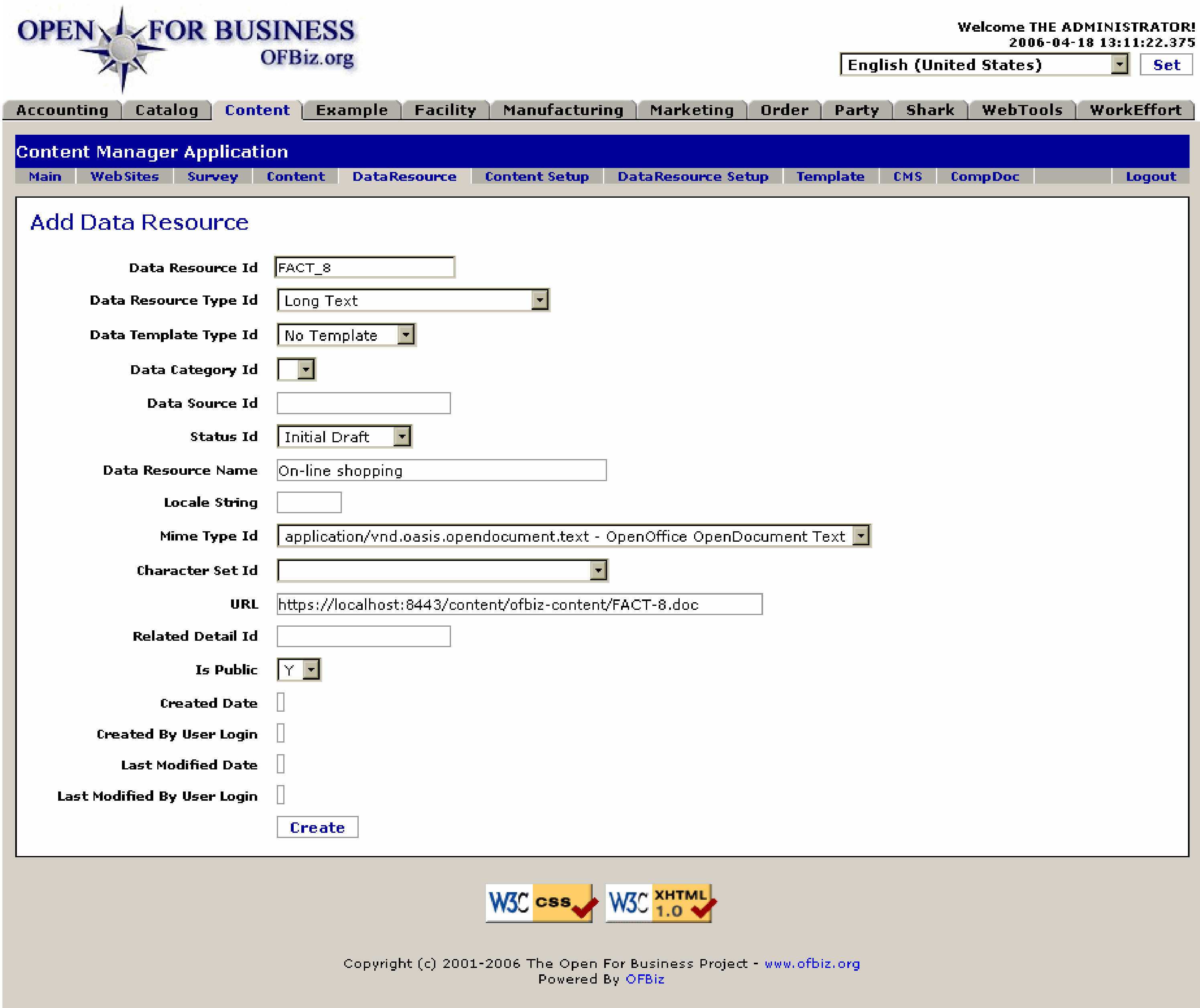
### .5.1.4 Table of Data Resources

Click on the ID in the left-hand column and you are taken to the Edit Data Resource screen.

Fields match those listed for the Search Engine, above. They are further discussed under various screens, below.

## .5.2 Add

### .5.2.1 AddDataResource




Once a new Data Resource has been created, Add that resource to OFBiz from this screen.

### .5.2.2 link buttons

[Create]

## .5.2.3 Data Resource ID

Enter an ID (identification term) that does not duplicate another Data Resource ID, that will make it easy to identify it by this name later, and preferably as one single word without spaces. Use the '_' character to connect parts together, such as 'ONE_WORD'.

This is not the Name of the resource; there is a separate Data Resource Name field below. However, this ID field is what will appear in drop-down boxes or from searches, so it is an important means of differentiating this Data Resource.

## .5.2.4 Data Resource Type ID (drop-down box)

Select from the drop-down box. Choices might include:

- Local file
- File (rel to OFBIZ_HOME)
- File (rel to webapp root)
- Local Binary File
- Binary File (rel to OFBIZ_HOME)
- Binary
- File (rel to webapp root) Hyperlink
- URL Resource
- Short Text
- Long Text
- Image
- Other
- Survey
- Survey Response

## .5.2.5 Data Template Type ID (drop-down box)

Select from the drop-down box. Choices might include:

- No Template
- FreeMarker
- Velocity
- WebMacro
- XSLT
- Screen widget

### .5.2.6 Data Category ID (drop-down box)

Select from the drop-down box, if Data Categories have been established and if one of them is applicable.

### .5.2.7 Data Source ID

If there is an identifiable source for this Resource, you may specify it here.

### .5.2.8 Status ID (drop-down box)

As with any iterative process, creation of a content item or a resource item will pass through several conditions before it is completely ready for use. Here is where you can indicate the Status of this item, using the drop-down box selections. Choices might be one of the following:

- In Progress
- Initial Draft
- Revised Draft
- Final Draft
- Published
- Deactivated

### .5.2.9 Data Resource Name

Create the descriptive Name here. There is no special format needed. This will be used to clarify the purpose,

content, and/or scope of the Data Resource.

### .5.2.10 Locale String

Where the electronic resource exists.

### .5.2.11 Mime Type ID (drop-down box)

Select from the numerous Mime Types on the drop-down box list. Mime Type ID might include one of the following:

- application/msword - Microsoft Word
- application/octet-stream - Arbitrary Binary Data
- application/PDF - Adobe Portable Document Format (PDF)
- application/postscript - Postscript Application/Script
- application/vnd.oasis.opendocument - OpenOffice OpenDocument Text

- application/vnd.ofbiz.survey -
- Survey
- application/vnd.ofbiz.survey.response - Survey Response
- application/zip - ZIP Data
- audio/basic - Basic Audio
- audio/mpeg - MPEG Audio
- image/gif - GIF Image
- image/jpeg - JPEG/JPG
- Image
- image/png - PNG Image
- image/tiff - TIFF Image
- message/external-body - External Body
- Message
- message/http - HTTP Message
- message/news - News Message
- message/partial - Partial
- Message
- message/rfc822 - RFC 822 Headered Message
- message/s-http - HTTPS/S-HTTP Message
- model/mesh - Mesh Model
- model/vrml - VRML Model
- multipart/alternative - Multiple Alternative Multipart
- multipart/digest - Digest of Messages Multipart
- multipart/encrypted - Encrypeted Multipart
- multipart/form-data - Form Data Multipart
- multipart/mixed - Mixed Type Multipart
- multipart/related - Related
- Multipart
- multipart/signed - Signed Multipart
- text/css - CSS Text
- text/enriched - Enriched Text
- text/html - HTML Text
- text/plain - Plain Text
- text/richtext - Rich Text
- text/rtf - RTF Rich Text
- text/sgml - SGML Text
- text/tab-separated-values - Tab Separated Value Text
- text/xml - XML Text
- video/mpeg - MPEG/MPG Video
- video/quicktime - Quicktime Video

## .5.2.12 Character Set ID (drop-down box)

Indicate which of the ISO, ASCII or Unicode character sets is used.

### .5.2.13 URL

The network address for the Resource.

### .5.2.14 Created Date

Date this Resource is 'created' or recorded here into the system. This will be automatically generated when you finish the Add process. The date and time will appear under this field when editing or working with the Resource at a later time.

### .5.2.15 Created by User Login

This will be the person logged in who created the Resource. Empty now, it will automatically populate when the added Resource is Created.

### .5.2.16 Last Modified Date

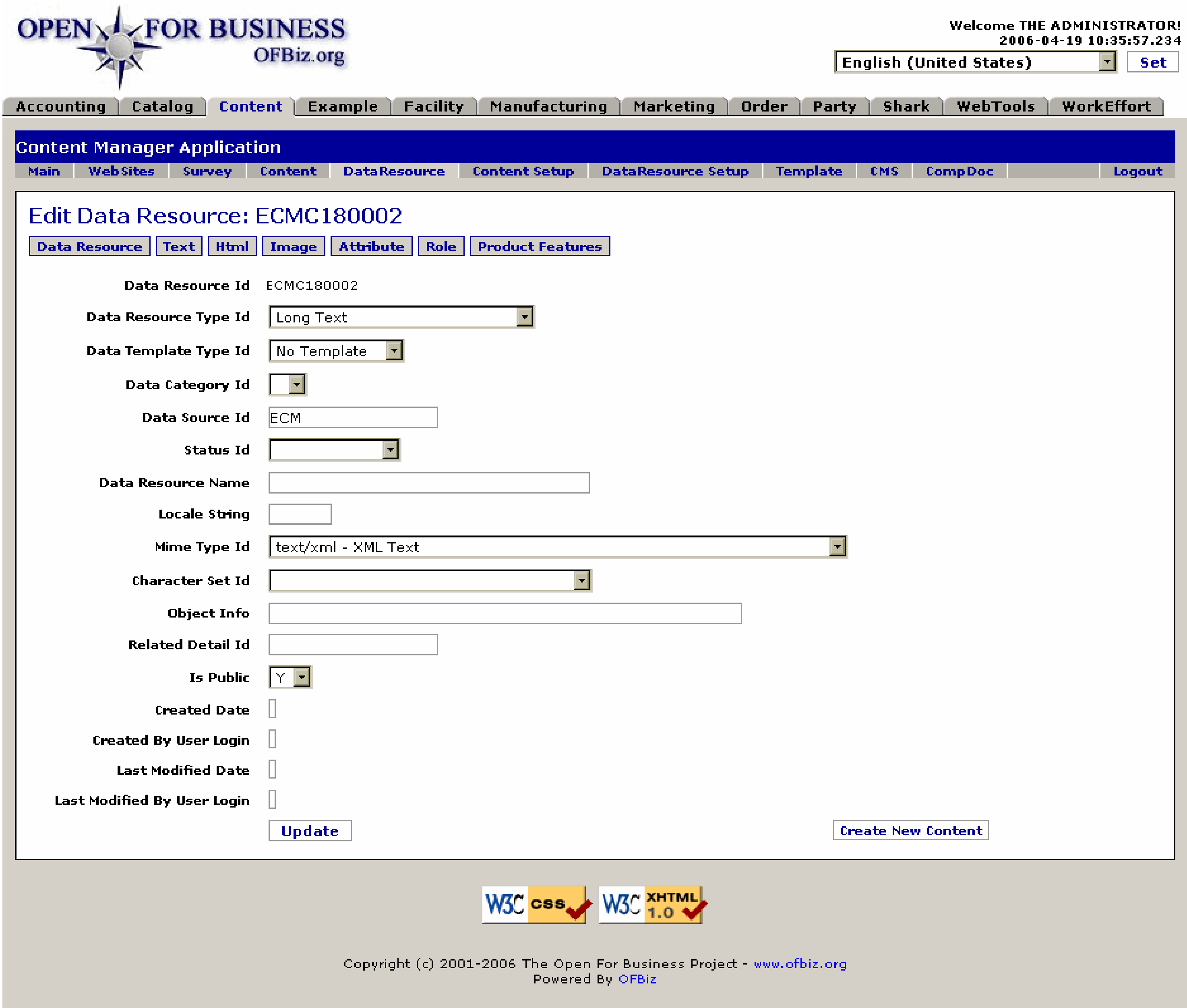
Whenever modified in the future, this field will show the date and time.

### .5.2.17 Last Modified by User Login

The Party making any changes to the Resource will be identified here.

## .5.3 DataResource tab

### .5.3.1 gotoDataResource




Upon selecting a specific DataResource, this editing screen is presented for viewing and updating the data.

### .5.3.2 link buttons

[Update] [Create New Content] [DataResource] [Text] [Html] [Image] [Attribute] [Role] [ProductFeatures]

### .5.3.3 Data Resource ID

Cannot be changed without creating a new Data Resource.

## .5.3.4 Data Resource Type ID (drop-down box)

The type of Data Resource might be one of the following:

- —
- Local File
- File (rel to OFBIZ HOME)
- File (rel to webapp root)
- Local Binary File
- Binary File (rel to OFBIZ_HOME)
- Binary File (rel to
- webapp root)
- Hyperlink
- URL Resource
- Short Text
- Long Text
- Image
- Other
- Survey
- Survey Response

## .5.3.5 Data Template Type ID (drop-down box)

The Data Template might be one of the following types:

- —
- No Template
- FreeMarker
- Velocity
- WebMacro
- XSLT
- Screen widget

## .5.3.6 Data Category ID (drop-down box)

The only Data Category IDs available will be ones you have created elsewhere.

## .5.3.7 Data Source ID

Original source of the Data Resource.

## .5.3.8 Status ID (drop-down box)

The following Status IDs might be provided:

- In Progress
- Initial Draft
- Revised Draft
- Final Draft
- Published
- Deactivated

## .5.3.9 Data Resource Name

How the resource is commonly referred to, the in-house name for this Data Resource.

## .5.3.10 Locale String

The electronic location of the Data Resource, on the server or the network.

## .5.3.11 Mime Type ID (drop-down box)

Mime Type ID might include one of the following:

- text/html - HTML Text (default)
- —
- application/octet-stream - Arbitrary Binary Data
- application/PDF - Adobe Portable Document Format (PDF)
- application/postscript - Postscript Application/Script
- application/zip - ZIP Data
- audio/basic - Basic Audio
- audio/mpeg - MPEG Audio
- image/gif - GIF Image
- image/jpeg - JPEG/JPG Image
- image/png -
- PNG Image
- image/tiff - TIFF Image

- message/external-body - External Body Message
- message/http -
- HTTP Message
- message/news - News Message
- message/partial - Partial Message
- message/rfc822
- RFC 822 Headered Message

- message/s-http - HTTPS/S-HTTP Message
- model/mesh - Mesh Model
- model/vrml - VRML Model
- multipart/alternative - Multiple Alternative Multipart
- multipart/digest - Digest
- of Messages Multipart
- multipart/encrypted - Encrypeted Multipart
- multipart/form-data - Form Data Multipart
- multipart/mixed - Mixed Type Multipart
- multipart/related - Related Multipart
- multipart/signed - Signed
- Multipart
- text/css - CSS Text
- text/enriched - Enriched Text
- text/html - HTML Text
- text/plain -
- Plain Text
- text/richtext - Rich Text
- text/rtf - RTF Rich Text
- text/sgml - SGML Text
- text/tab-separated-values - Tab Separated Value Text
- text/xml - XML Text
- video/mpeg - MPEG/MPG
- Video
- video/quicktime - Quicktime Video

## .5.3.12 Character Set ID (drop-down box)

One of the following kinds of Character Set might be specified:

- ISO-8859-1 English
- ISO-8859-2 ?
- ISO-8859-3 ?
- ISO-8859-4 ?
- ISO-8859-5 ?
- ISO-8859-6 Latin/Arabic

- ISO-8859-7 ?
- ISO-8859-8 Latin/Hebrew
- ISO-8859-9 ?
- ISO-8859-10 ?
- US-ASCII as defined in ANSI X3.4-1986
- Unicode 8 bit
- Unicode 16 bit

## .5.3.13 Object Info

Information about the object.

## .5.3.14 Related Detail ID

If other Details are related to this Data Resource and you can identify them by an ID, enter that here.

## .5.3.15 Is Public (Y/N)

If this Data Resource is not to be seen by the public, be sure to set this to N.

## .5.3.16 Created Date

Format: YYYY-MM-DD HH:MM:SS.sss. Should be populated after the Resource is created.

## .5.3.17 Created By User Login

The LoginID of the person logged in at the time of creation, or it can be assigned to whomever developed the Resource.

## .5.3.18 Last Modified Date

Format: YYYY-MM-DD HH:MM:SS.sss Should be changed automatically whenever the content is Updated.

## .5.3.19 Last Modified by User Login

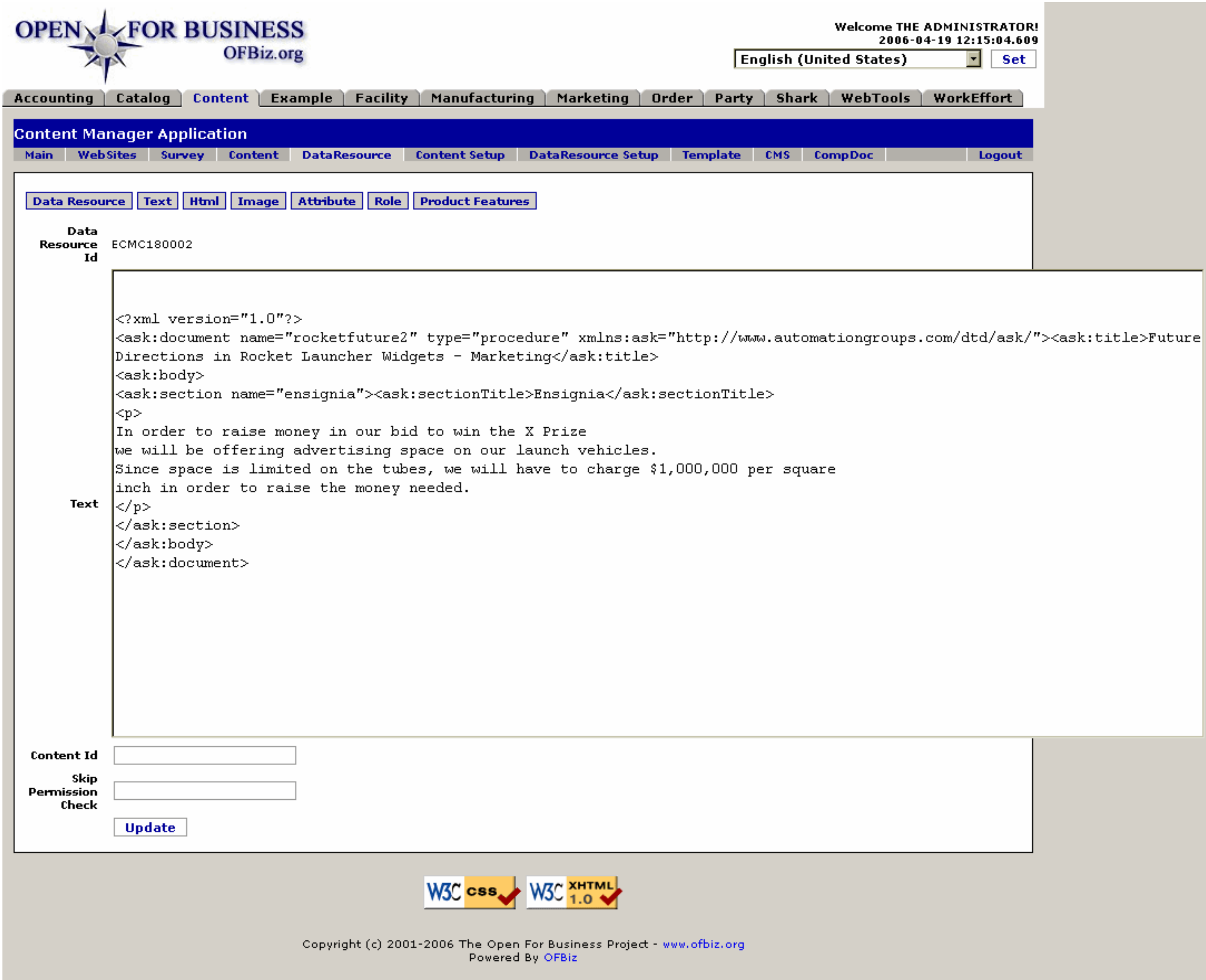
The Party under whose Login ID this Data Resource was last altered or edited.

### .5.3.20 Create New Content link

Takes you to the Content Manager > Content > Content > Create New Content screen, with the current Data Resource populated as the Data Resource ID.

## .5.4 Text tab

### .5.4.1 EditElectronicText




This is an active, limited Text Editor for the XML/HTML text available through OFBiz. View or Edit here.

### .5.4.2 link buttons

[Update] [DataResource] [Text] [Html] [Image] [Attribute] [Role] [ProductFeatures]

### .5.4.3 Data Resource ID

Cannot be changed without creating a new Data Resource.

### .5.4.4 Text Data

Scrolling box with actual text of code for the DataResource.

CAUTION: This is an editable box!!! Any changes made here will be reflected in the actual file. You may be prompted for the file name and location to save any changes when you select the [Update] button.

### .5.4.5 Content ID

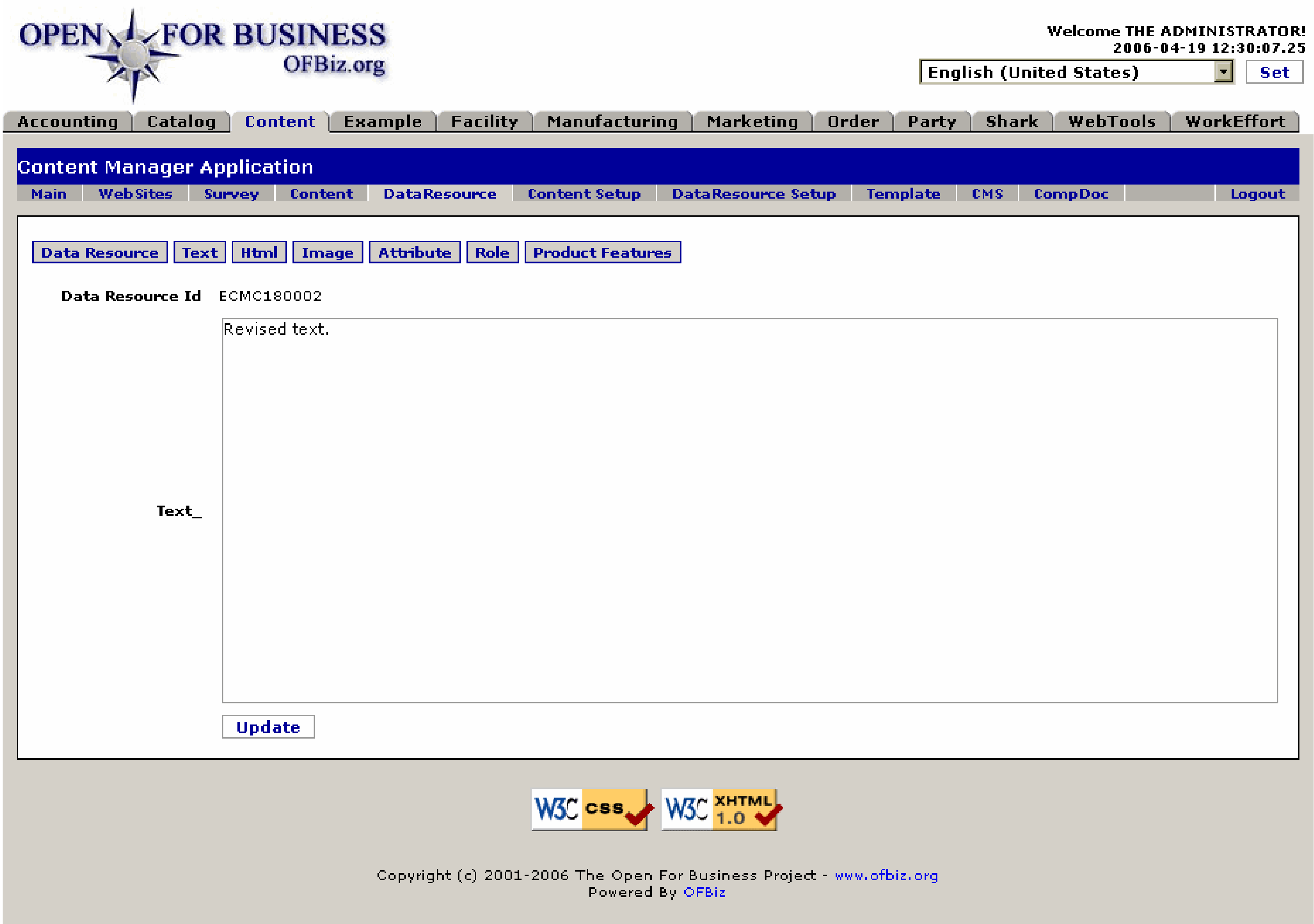
If this text has a separate Content ID, enter it here.

### .5.4.6 Skip Permission Check

Complete this as needed.

## .5.5 Html tab

### .5.5.1 EditHtmlText




This tab is probably being replaced by CompDoc.

### .5.5.2 link buttons

[Update] [DataResource] [Text] [Html] [Image] [Attribute] [Role] [ProductFeatures]

### .5.5.3 Data Resource ID

The Data Resource being viewed or edited. This ID cannot be changed.

## .5.5.4 Text_

CAUTION: This is an editable box!!! Any changes made here will be reflected in the actual file. You may be prompted for the file name and location to save any changes when you select the [Update] button.

## .5.6 Image tab

### .5.6.1 Discussion

You must have previously found/selected an Image_Object to use this function. If no image is viewed immediately, browse for the file path and name; press [Upload] to then view the image.

### .5.6.2 UploadImage


When you create an Image-type Data Resource, you are brought to this screen to find and upload the Image.

### .5.6.3 link buttons

[Update] [Browse] [DataResource] [Text] [Html] [Image] [Attribute] [Role] [ProductFeatures]

### .5.6.4 Data Resource ID

The selected Data Resource. This cannot be changed.

### .5.6.5 Data Resource Type ID (drop-down box)

Select the Resource Type ID from the drop-down box if this needs to be changed. Should be the same as when you created the Data Resource.

### .5.6.6 Image File Name

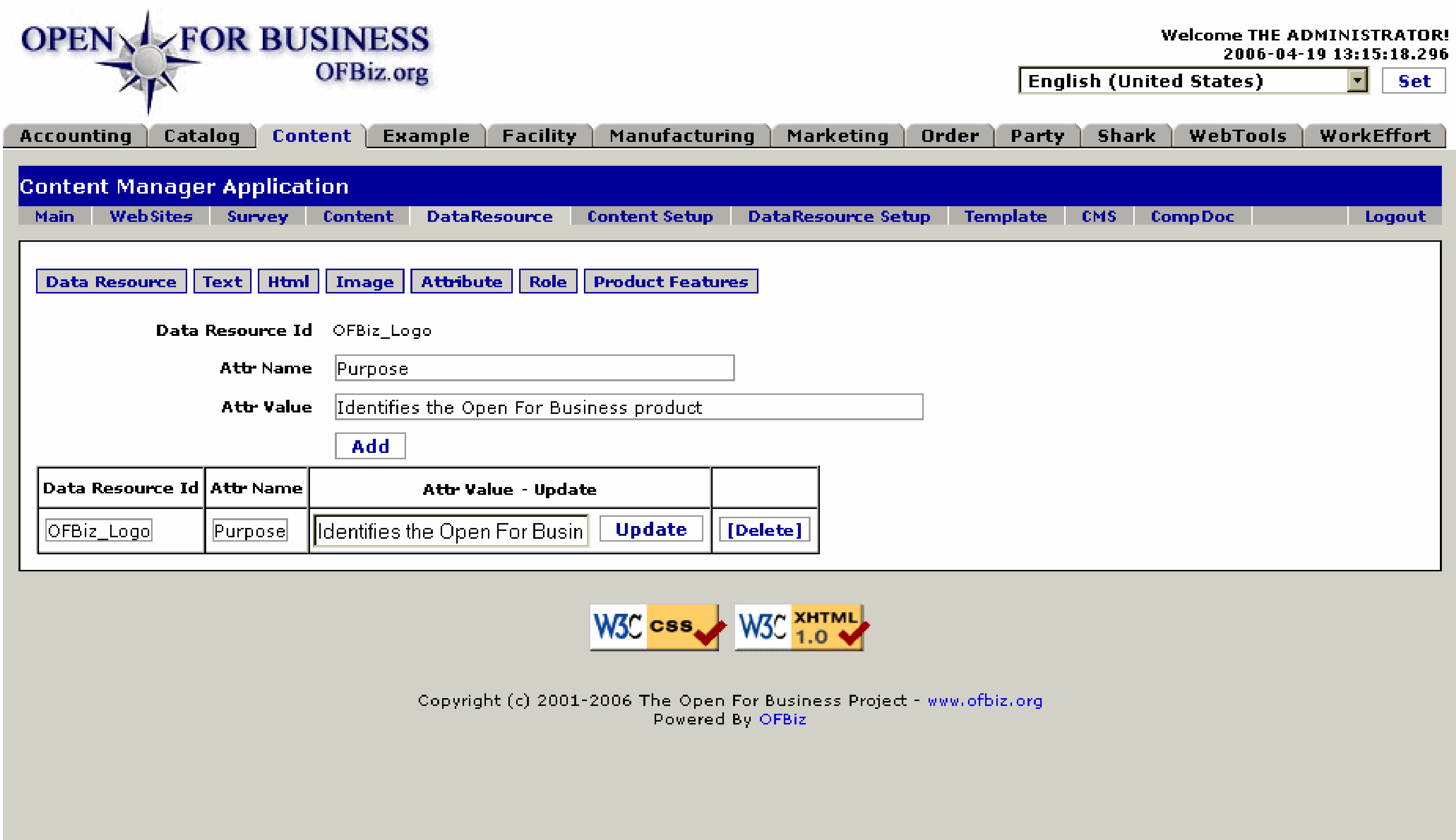
Assigned name of the Image File associated with this Data Resource; includes the extension (.jpg, .gif, etc.).

### .5.6.7 Image Data

This is the literal path to the resource image, usually populated through the Browse function. [Browse] will pull up a search tool to help you locate the file.

## .5.7 Attribute tab

### .5.7.1 EditDataResourceAttribute




Identify Attributes of a Data Resource; change Value as needed; or establish new Attributes and Values here.

### .5.7.2 link buttons

[Add] [Update] [Delete] [DataResource] [Text] [Html] [Image] [Attribute] [Role] [ProductFeatures]

### .5.7.3 Tool

Tool to associate additional attributes.

#### .5.7.3.1 Data Resource ID

How the Data Resource is identified.

### .5.7.3.2 Attr Name

An Attribute can be added here without specifying a value, but a Value cannot be added without an accompanying Name.

### .5.7.3.3 Attr Value

Give a qualifying word or phrase to describe the Attribute.

## .5.7.4 Table

Table of existing attributes.

### .5.7.4.1 Data Resource ID

The selected Data Resource identification.

### .5.7.4.2 Attr Name

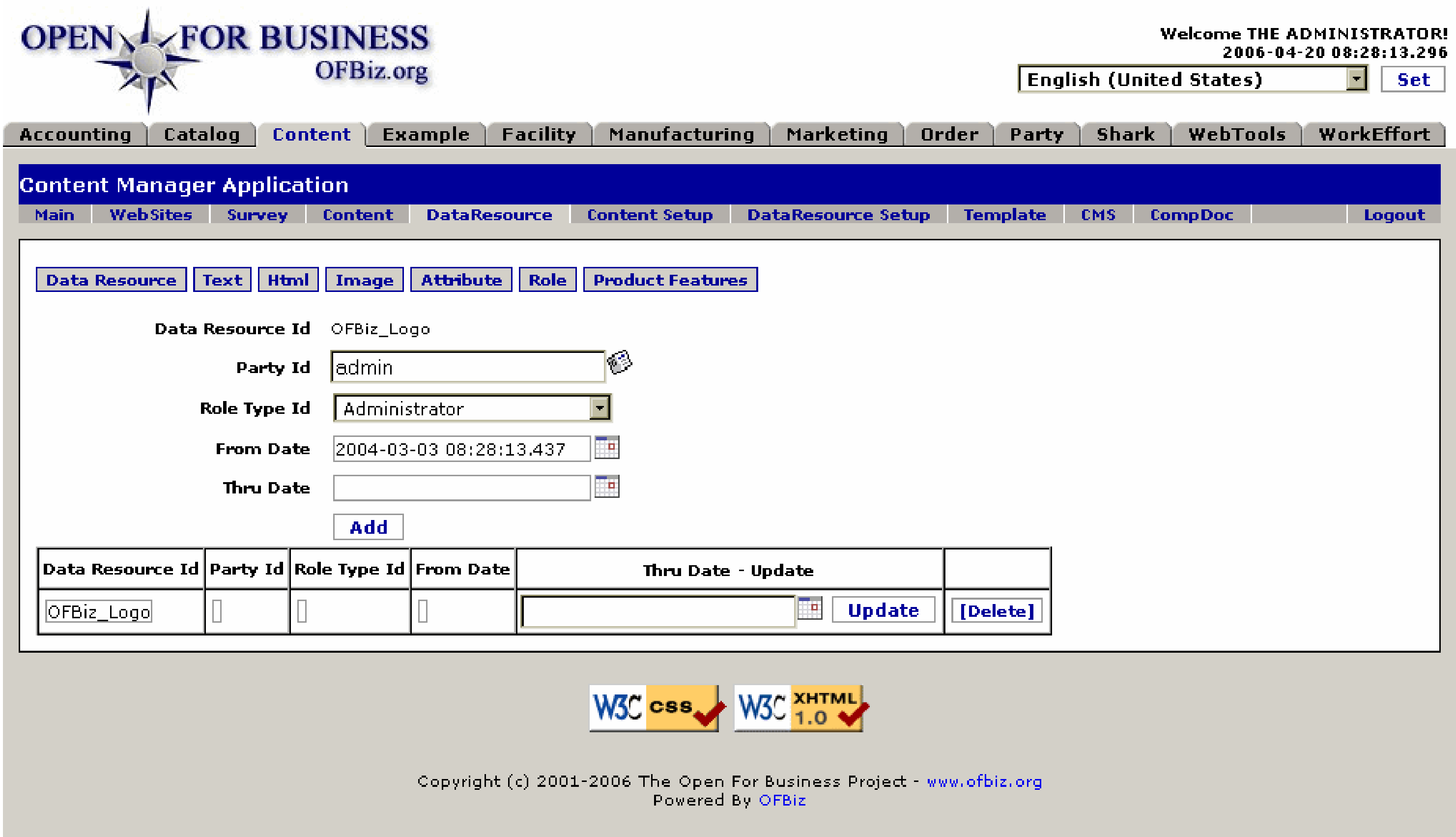
What the attribute is called. This cannot be changed within the table.

### .5.7.4.3 Attr Value

The Value of an existing Attribute can be modified here without having to create a new Attribute. Make the change, then click [Update].

## .5.8 Role tab

## .5.8.1 EditDataResourceRole




The Role of any party associated with the Data Resource is assigned here.

## .5.8.2 link buttons

[Add] [Update] [Delete] [DataResource] [Text] [Html] [Image] [Attribute] [Role] [ProductFeatures]

## .5.8.3 Tool

Tool to add roles.

### .5.8.3.1 Data Resource ID

The previously-selected Data Resource to which you are associating a Party and the Party's Role.

### .5.8.3.2 Party ID (popup screen)

Either enter the Party ID directly or use the popup screen to identify which Party you are associating with the Data Resource.

### .5.8.3.3 Role Type ID (drop-down box)

Identify which Role the Party is playing for the Data Resource by selecting that Role Type from the drop-down screen.

### .5.8.3.4 From Date (popup calendar)

Use the popup-calendar to state the date this association did or will begin. This is a MANDATORY field; it will NOT automatically populate when the Role is assigned.

### .5.8.3.5 Thru Date (popup calendar)

If the Role is to expire, enter that date here.

## .5.8.4 Table

Table of existing Roles. You can change the expiration date of the assignment or delete the Role assignment within this table.

### .5.8.4.1 Data Resource ID

Identifies which Data Resource is being reported in this line of the table.

### .5.8.4.2 Party ID

The Party associated in a Role with this Data Resource.

### .5.8.4.3 Role Type ID

Which Role was assigned to the Party for this Data Resource.

### .5.8.4.4 From Date

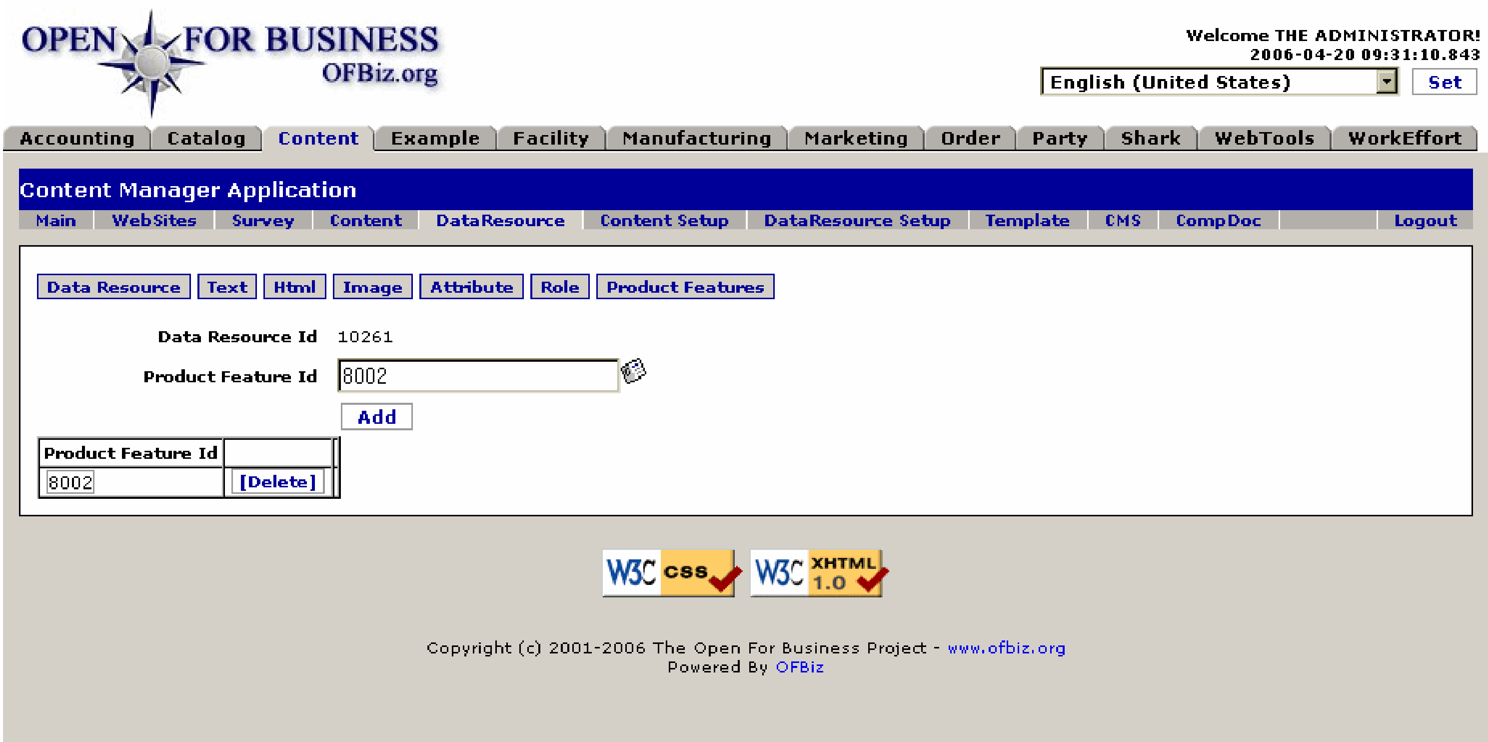
When the Role was assigned or made effective.

## .5.8.4.5 Thru Date (popup calendar)

If the Role for this Party and Data Resource is to expire, when that expiration will occur. This Date can be changed (updated) here within the table. Use the popup calendar and click on the [Update] link.

# .5.9 Product Features

## .5.9.1 EditDataResourceProductFeatures




Previously established Product Features are associated with the selected Data Resource at this screen.

## .5.9.2 link buttons

[Add] [Delete] [DataResource] [Text] [Html] [Image] [Attribute] [Role] [ProductFeatures]

## .5.9.3 Tool

Tool to add feature.

#### .5.9.3.1 Data Resource ID

Cannot change this here; select a different Data Resource at the Find Data Resource screen if you wish to work with a different one.

#### .5.9.3.2 Product Feature ID (popup screen)

Use the popup screen to identify the Product Feature to be associated with the Data Resource.

### .5.9.4 Table

Table of Product Features.

#### .5.9.4.1 Product Feature ID

Once assigned, the Product Feature is listed here in this table. Click the [Delete] button to remove.

# .6 Content Setup

## .6.1 Content Setup first screen

### .6.1.1 Discussion

When you click on the ContentSetup tab, this screen is the first to appear. Complete any changes you need to at this screen before selecting one of the sub-tabs. You may always return here by clicking on the primary Content Setup tab.

NOTES:

1. Any changes you make here will impact every instance of the changed Content Type!
2. This is the place to create new Content Types. Be sure to associate them with a Parent, if appropriate.

### .6.1.2 EditContentType

OPEN FOR BUSINESS OFBiz.org

Welcome THE ADMINISTRATOR!
2006-04-20 10:38:38.562
English (United States) Set

Accounting | Catalog | Content | Example | Facility | Manufacturing | Marketing | Order | Party | Shark | WebTools | WorkEffort

Content Manager Application

Main | WebSites | Survey | Content | DataResource | Content Setup | DataResource Setup | Template | CMS | CompDoc | Logout

PurposeOperation | Operation | AssocPredicate | TypeAttr | PurposeType | AssocType | Type | Permissions

| ContentTypeId | Parent Type Id | Has Table | Description | Update | |
|---|---|---|---|---|---|
| DOCUMENT | | N | Document | Update | [Delete] |
| TEMPLATE | | N | Template or Form | Update | [Delete] |
| ANNOTATION | | N | Annotation | Update | [Delete] |
| CONTENT_LIST | | N | Content List | Update | [Delete] |
| TREE_ROOT | | N | Tree Root | Update | [Delete] |
| GRAPH_ROOT | | N | Graph Root | Update | [Delete] |
| STRUCTURE_NODE | | N | Structure Node | Update | [Delete] |
| STRUCTURE_LEAF | | N | Structure Leaf | Update | [Delete] |
| STRUCTURE_DEF | | N | Structure Definition (like DTD) | Update | [Delete] |
| TXFORM_DEF | | N | Transformation Definition (like XSLT) | Update | [Delete] |
| OUTLINE_NODE | DOCUMENT | N | Outline Node | Update | [Delete] |
| PAGE_NODE | DOCUMENT | N | Page Node | Update | [Delete] |
| SUBPAGE_NODE | DOCUMENT | N | Sub Page Node | Update | [Delete] |
| PLACEHOLDER | | Y | Place Holder | Update | [Delete] |
| PEOPLE | PLACEHOLDER | Y | People | Update | [Delete] |
| PERSON | PLACEHOLDER | Y | Person | Update | [Delete] |
| WEB_SITE_PUB_PT | PLACEHOLDER | Y | Publish Point | Update | [Delete] |
| DEPARTMENT | PLACEHOLDER | Y | Department | Update | [Delete] |
| TOPIC | PLACEHOLDER | Y | Topic | Update | [Delete] |
| COMPDOC_TEMPLATE | | Y | Composite Document Template | Update | [Delete] |
| COMPDOC_INSTANCE | | Y | Composite Document Instance | Update | [Delete] |

Content Type Id

Parent Type Id

Has Table Y

Description

Add



Edit, delete or add new Content Types at this screen.

## .6.1.3 Table of Content Types

### .6.1.3.1 ContentTypeId

Which Content Type is viewed or to be edited in this line of the table.

### .6.1.3.2 Parent Type Id

If this Content Type is a child, the Parent Type Id is given here. If nothing given, then this is a Parent Type.

### .6.1.3.3 Has Table (Y/N)

If the ContentType has a table associated with it, this flag should be set to Y; otherwise set to N.

### .6.1.3.4 Description

Give a succinct description of the Content Type here.

### .6.1.3.5 Action buttons

If you make changes within the table, be sure to click on the [Update] button to make them effective. If you click on the [Delete] button, this Type will be removed.

## .6.1.4 Tool to create Content Types

### .6.1.4.1 Content Type ID

Enter the name by which it will be known. Convention suggests all caps, with an underscore '_' between each word.

### .6.1.4.2 Parent Type Id

If this is a Child, enter the parent's Type in here. Must be exact or the relationship will not be recognized.

### .6.1.4.3 Has Table (Y/N)

If there is a table to be associated with this Type ID, select Y from the toggle. This can always be changed in the table above later if needed.

### .6.1.4.4 Description

Enter a very brief, succinct, concise Description here.

## .6.2 PurposeOperation tab

### .6.2.1 EditContentPurposeOperation

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2006-04-20 13:30:23.552
English (United States) Set

Accounting | Catalog | Content | Example | Facility | Manufacturing | Marketing | Order | Party | Shark | WebTools | WorkEffort

Content Manager Application

Main | WebSites | Survey | Content | DataResource | Content Setup | DataResource Setup | Template | CMS | CompDoc | Logout

PurposeOperation | Operation | AssocPredicate | TypeAttr | PurposeType | AssocType | Type | Permissions

| Content Purpose Type Id | Content Operation Id | Role Type Id | Status Id | Privilege Enum Id | |
|---|---|---|---|---|---|
| ARTICLE | CONTENT_CREATE | BLOG_AUTHOR | BLOG_PUBLISHED | CNT_PRV_NA_ | [Delete] |
| ARTICLE | CONTENT_CREATE | BLOG_AUTHOR | _NA_ | CNT_PRV_NA_ | [Delete] |
| ARTICLE | CONTENT_CREATE | BLOG_EDITOR | _NA_ | CNT_PRV_NA_ | [Delete] |
| ARTICLE | CONTENT_PUBLISH | BLOG_EDITOR | _NA_ | CNT_PRV_NA_ | [Delete] |
| ARTICLE | CONTENT_PUBLISH | BLOG_PUBLISHER | BLOG_PUBLISHED | CNT_PRV_NA_ | [Delete] |
| ARTICLE | CONTENT_PUBLISH | OWNER | _NA_ | CNT_PRV_NA_ | [Delete] |
| ARTICLE | CONTENT_PUBLISH_SELF | BLOG_AUTHOR | BLOG_PUBLISHED | CNT_PRV_NA_ | [Delete] |
| ARTICLE | CONTENT_RESPOND | BLOG_USER | BLOG_PUBLISHED | CNT_PRV_NA_ | [Delete] |
| ARTICLE | CONTENT_UPDATE | BLOG_EDITOR | _NA_ | CNT_PRV_NA_ | [Delete] |
| ARTICLE | CONTENT_UPDATE | OWNER | BLOG_DRAFT | CNT_PRV_NA_ | [Delete] |
| ARTICLE | CONTENT_VIEW | BLOG_AUTHOR | BLOG_PUBLISHED | CNT_PRV_NA_ | [Delete] |
| ARTICLE | CONTENT_VIEW | BLOG_EDITOR | _NA_ | CNT_PRV_NA_ | [Delete] |
| _NA_ | CONTENT_VIEW | BLOG_ADMIN | _NA_ | CNT_PRV_NA_ | [Delete] |
| _NA_ | CONTENT_VIEW | BLOG_USER | BLOG_PUBLISHED | CNT_PRV_NA_ | [Delete] |
| ARTICLE | CONTENT_VIEW | OWNER | BLOG_DRAFT | CNT_PRV_NA_ | [Delete] |
| RESPONSE | CONTENT_CREATE | BLOG_EDITOR | _NA_ | CNT_PRV_NA_ | [Delete] |
| RESPONSE | CONTENT_PUBLISH | BLOG_PUBLISHER | BLOG_PUBLISHED | CNT_PRV_NA_ | [Delete] |
| RESPONSE | CONTENT_PUBLISH | BLOG_USER | BLOG_PUBLISHED | CNT_PRV_NA_ | [Delete] |
| RESPONSE | CONTENT_RESPOND | BLOG_USER | BLOG_PUBLISHED | CNT_PRV_NA_ | [Delete] |
| RESPONSE | CONTENT_UPDATE | BLOG_EDITOR | _NA_ | CNT_PRV_NA_ | [Delete] |
| _NA_ | _NA_ | BLOG_ADMIN | _NA_ | CNT_PRV_NA_ | [Delete] |
| USER | CONTENT_UPDATE | OWNER | _NA_ | CNT_PRV_NA_ | [Delete] |
| _NA_ | HAS_OWNER_ROLE | OWNER | _NA_ | CNT_PRV_NA_ | [Delete] |
| _NA_ | HAS_USER_ROLE | BLOG_USER | _NA_ | CNT_PRV_NA_ | [Delete] |
| _NA_ | HAS_AUTHOR_ROLE | BLOG_AUTHOR | _NA_ | CNT_PRV_NA_ | [Delete] |
| _NA_ | HAS_EDITOR_ROLE | BLOG_EDITOR | _NA_ | CNT_PRV_NA_ | [Delete] |
| _NA_ | HAS_ADMIN_ROLE | BLOG_ADMIN | _NA_ | CNT_PRV_NA_ | [Delete] |
| _NA_ | HAS_PUBLISHER_ROLE | BLOG_PUBLISHER | _NA_ | CNT_PRV_NA_ | [Delete] |
| ARTICLE | CONTENT_CREATE_SUB | OWNER | _NA_ | CNT_PRV_NA_ | [Delete] |
| _NA_ | CONTENT_PUBLISH | BLOG_PUBLISHER | _NA_ | CNT_PRV_NA_ | [Delete] |
| _NA_ | CONTENT_LINK_TO | OWNER | _NA_ | CNT_PRV_NA_ | [Delete] |
| _NA_ | CONTENT_LINK_FROM | OWNER | _NA_ | CNT_PRV_NA_ | [Delete] |
| _NA_ | CONTENT_LINK_TO | BLOG_ADMIN | _NA_ | CNT_PRV_NA_ | [Delete] |
| _NA_ | CONTENT_LINK_FROM | BLOG_ADMIN | _NA_ | CNT_PRV_NA_ | [Delete] |
| ARTICLE | CONTENT_LINK_TO | LOGGEDIN | _NA_ | CNT_PRV_NA_ | [Delete] |
| RESPONSE | CONTENT_LINK_TO | LOGGEDIN | _NA_ | CNT_PRV_NA_ | [Delete] |
| RESPONSE | CONTENT_LINK_FROM | LOGGEDIN | _NA_ | CNT_PRV_NA_ | [Delete] |
| RESPONSE | CONTENT_UPDATE | LOGGEDIN | _NA_ | _NA_ | [Delete] |
| RESPONSE | CONTENT_CREATE | LOGGEDIN | _NA_ | _NA_ | [Delete] |

Content Purpose Type Id

Content Operation Id

Role Type Id

Status Id

Privilege Enum Id

Add



Various combinations of Content Purpose, Content Operation, Role, Status and Privilege are created and presented here.

## .6.2.2 link buttons

[Delete] [Add] [PurposeOperation] [Operation] [AssocPredicate] [TypeAttr] [PurposeType] [AssocType] [Type] [Permissions]

## .6.2.3 Table

Table of existing Content Purpose Operations type IDs.

### .6.2.3.1 Content Purpose Type ID

For what purpose is this Content Resource specified? There might be none in particular (*NA*), or perhaps one of the following:

- Article
- Message
- Feedback
- Comment
- Product Info
- Company Info
- Advertisement
- General Info
- Description
- Owner
- Response
- Not Applicable
- Section
- Topic
- Summary
- Main Content
- Sub Content
- User
- FAQ
- General
- Source

### .6.2.3.2 Content Operation ID

Content Operation could include one of the following IDs:

- Content Admin
- Content Create
- Content Update

- Content Delete
- Content View
- Content Respond
- Content Publish
- Not Applicable
- Has User Role
- Has Author Role
- Has Editor Role
- Has Admin Role
- Has Publisher Role
- Create SubContent
- View Short Desc
- Child Create
- Child Update
- Child
- Delete
- Child View
- Content Link
- Content Link To
- Content Link From

#### .6.2.3.3 Role Type ID

Any of the standard Role Types (as used throughout OFBiz) could be found here.

#### .6.2.3.4 Status ID

If a particular Status should be associated with this Operation, that will be given here.

#### .6.2.3.5 Privilege Enum ID

If privileged access is needed for this Operation, that Privilege Enum will be specified here.

### .6.2.4 Tool

Tool to add new Content Purpose Operations.

#### .6.2.4.1 Content Purpose Type ID (drop-down box)

Content Purpose Types could be one of the following:

- Article
- Message
- Feedback
- Comment
- Product Info
- Company Info
- Advertisement
- General Info
- Description
- Owner
- Response
- Not Applicable
- Section
- Topic
- Summary
- Main Content
- Sub
- Content
- User
- FAQ
- General Source

## .6.2.4.2 Content Operation ID (drop-down box)

Content Operation could include one of the following IDs:

- Content Admin
- Content Create
- Content Update
- Content Delete
- Content View
- Content Respond
- Content Publish
- Not Applicable
- Has User Role
- Has Author Role
- Has Editor Role
- Has Admin Role
- Has Publisher Role
- Create SubContent
- View Short Desc
- Child Create
- Child Update
- Child

- Delete
- Child View
- Content Link
- Content Link To
- Content Link From

### .6.2.4.3 Role Type ID (drop-down box)

All of the standard Role Types (as used throughout OFBiz) should be available from the drop-down box.

### .6.2.4.4 Status ID

If a particular Status should be associated with this Operation, that will be entered here.

### .6.2.4.5 Privilege Enum ID

If privileged access is needed for this Operation, that Privilege Enum needs to be specified here.

## .6.3 Operation tab

### .6.3.1 EditContentOperation

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English (United States) Set

Accounting | Catalog | Content | Example | Facility | Manufacturing | Marketing | Order | Party | Shark | WebTools | WorkEffort

Content Manager Application

Main | WebSites | Survey | Content | DataResource | Content Setup | DataResource Setup | Template | CMS | CompDoc | Logout

PurposeOperation | Operation | AssocPredicate | TypeAttr | PurposeType | AssocType | Type | Permissions

| ContentOperationId | Description - Update | | |
|---|---|---|---|
| CONTENT_ADMIN | Content Admin | Update | [Delete] |
| CONTENT_CREATE | Content Create | Update | [Delete] |
| CONTENT_UPDATE | Content Update | Update | [Delete] |
| CONTENT_DELETE | Content Delete | Update | [Delete] |
| CONTENT_VIEW | Content View | Update | [Delete] |
| CONTENT_PUBLISH | Content Publish | Update | [Delete] |
| CONTENT_RESPOND | Content Respond | Update | [Delete] |
| CONTENT_PUBLISH_SELF | Content Publish | Update | [Delete] |
| _NA_ | Not Applicable | Update | [Delete] |
| HAS_OWNER_ROLE | Has User Role | Update | [Delete] |
| HAS_USER_ROLE | Has User Role | Update | [Delete] |
| HAS_AUTHOR_ROLE | Has Author Role | Update | [Delete] |
| HAS_EDITOR_ROLE | Has Editor Role | Update | [Delete] |
| HAS_ADMIN_ROLE | Has Admin Role | Update | [Delete] |
| HAS_PUBLISHER_ROLE | Has Publisher Role | Update | [Delete] |
| CONTENT_CREATE_SUB | Create SubContent | Update | [Delete] |
| CONTENT_VIEW_SHORT | View Short Desc | Update | [Delete] |
| CHILD_CREATE | Child Create | Update | [Delete] |
| CHILD_UPDATE | Child Update | Update | [Delete] |
| CHILD_DELETE | Child Delete | Update | [Delete] |
| CHILD_VIEW | Child View | Update | [Delete] |
| CONTENT_LINK | Content Link | Update | [Delete] |
| CONTENT_LINK_TO | Content Link To | Update | [Delete] |
| CONTENT_LINK_FROM | Content Link From | Update | [Delete] |

Content Operation Id

Description

Add



Edit the Description of a Content Operation in the table, or add a new Content Operation with the tool below.

## .6.3.2 link buttons

[Update] [Delete] [Add] [PurposeOperation] [Operation] [AssocPredicate] [TypeAttr] [PurposeType] [AssocType] [Type] [Permissions]

## .6.3.3 Table

Table of existing Content Operation IDs.

### .6.3.3.1 ContentOperationID

The name of the Content Operation, used as an ID.

### .6.3.3.2 Description

You can edit this description here. Click on [Update] when finished making changes.

## .6.3.4 Tool

Tool to add new Content Operation IDs.

### .6.3.4.1 ContentOperationID

You can create any type of Content Operation that might be desired for your needs. Name it here using the convention of all capital letters, joined by an underscore '_' bar.

### .6.3.4.2 Description

Describe in a few words what the Content Operation might consist of. Click on the [Add] button when completed.

## .6.4 Assoc Predicate tab

### .6.4.1 EditContentAssocPredicate


Add new Content Assoc Predicates or update the description of them at this screen.

### .6.4.2 link buttons

[Update] [Delete] [Add] [PurposeOperation] [Operation] [AssocPredicate] [TypeAttr] [PurposeType] [AssocType] [Type] [Permissions]

### .6.4.3 Table

Table of existing AssocPredicate IDs.

### .6.4.3.1 ContentAssocPredicateID

The Associated Predicate bridges between operation and content. Named Predicates are listed in this column.

(Remember that a Predicate is the action or relationship part of a statement.)

### .6.4.3.2 Description

The Description helps to explain how the Predicate can be used. You can edit this description here. Click [Update] when finished.

## .6.4.4 Tool

Tool to add new AssocPredicate IDs.

### .6.4.4.1 ContentAssocPredicateID

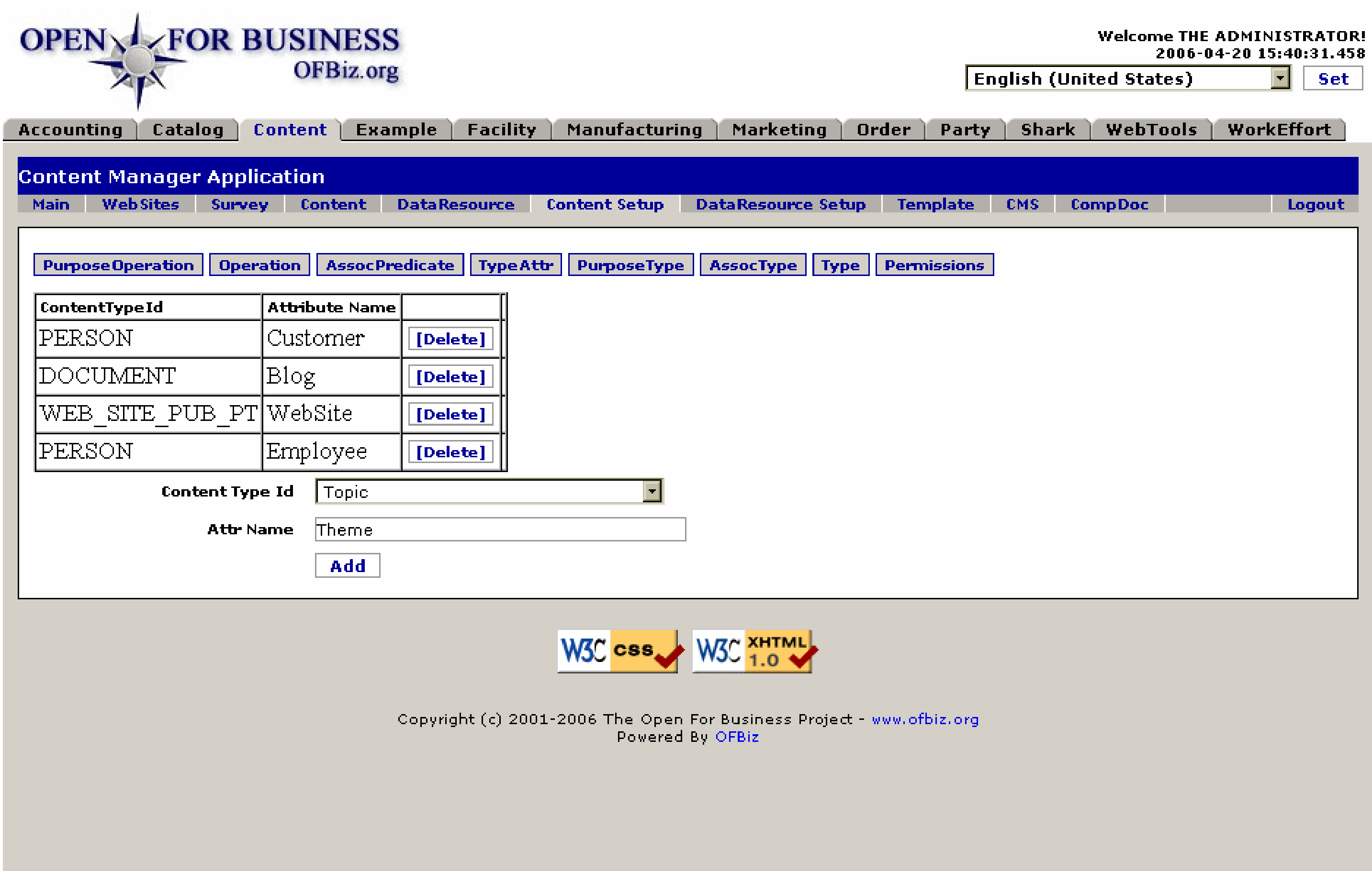
Enter a verb, an action phrase, or a relationship word here. By custom, this will be all lower case letters, no capitalization.

### .6.4.4.2 Description

Describe what the Predicate will be used to perform in an operation, using a complete sentence.

# .6.5 Type Attribute tab

## .6.5.1 EditContentTypeAttr




Create or delete Attributes for Content Types at this screen.

## .6.5.2 link buttons

[Delete] [Add] [PurposeOperation] [Operation] [AssocPredicate] [TypeAttr] [PurposeType] [AssocType] [Type] [Permissions]

## .6.5.3 Table

Table of existing Attributes.

### .6.5.3.1 ContentTypeID

This will be one of the established types of ContentTypes. It was chosen from the drop-down box, in the tool below.

See that for a list of possible choices.

### .6.5.3.2 Attribute Name

The Name you have assigned to the Attribute will be here. This cannot be changed. If the ContentType/Attribute combination is not valid, remove it here using the [Delete] button.

## .6.5.4 Tool

Tool to add new Attributes.

### .6.5.4.1 ContentTypeID (drop-down box)

Select from the drop-down box. Content Types might include:

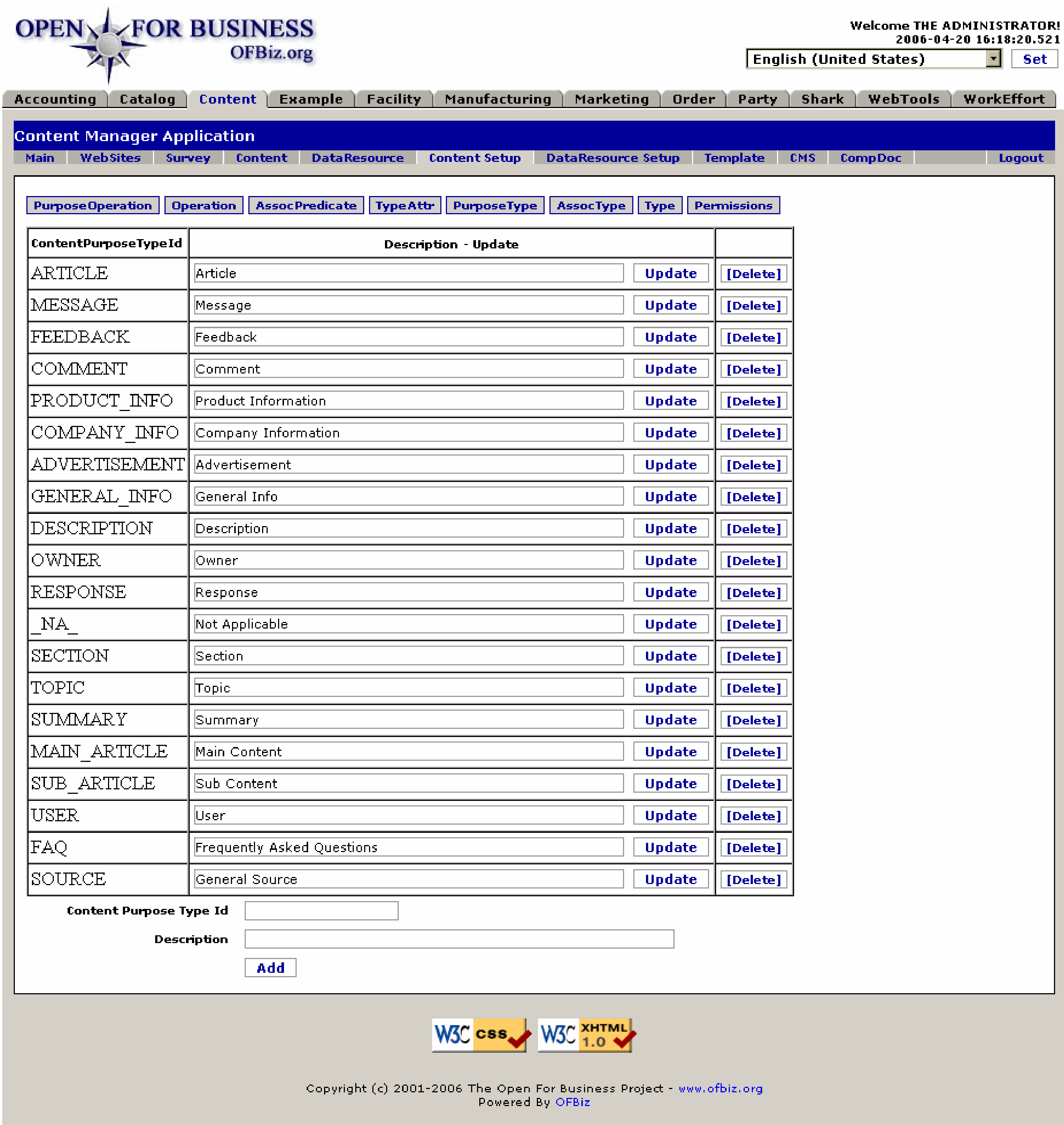
- Document
- Template or Form
- Annotation
- Content List
- Tree Root
- Graph Root
- Structure Node
- Structure Leaf
- Structure Definition (like DTD)
- Transformation Definition (like XSLT)
- Outline Node
- Page Node
- Sub Page Node
- Placeholder
- People
- Person
- Publish Point
- Department
- Topic
- Composite Document Instance
- Composite Document Template

### .6.5.4.2 Attr Name

You assign the name that you need to create an Attribute from this Content Type.

## .6.6 Purpose Type tab

### .6.6.1 EditContentPurposeType




Edit the Description of existing Content Purpose Types or create new ones at this screen.

## .6.6.2 link buttons

[Update] [Delete] [Add] [PurposeOperation] [Operation] [AssocPredicate] [TypeAttr] [PurposeType] [AssocType] [Type] [Permissions]

## .6.6.3 Table

Table of existing Purpose Type IDs.

### .6.6.3.1 ContentPurposeType ID

The name of the Content Purpose Type. This cannot be changed; if no longer valid, delete on its line.

### .6.6.3.2 Description

Describes the Content Purpose Type. If you make changes here, click the [Update] button when finished.

## .6.6.4 Tool

Tool to add new PurposeType IDs.

### .6.6.4.1 ContentPurposeType ID

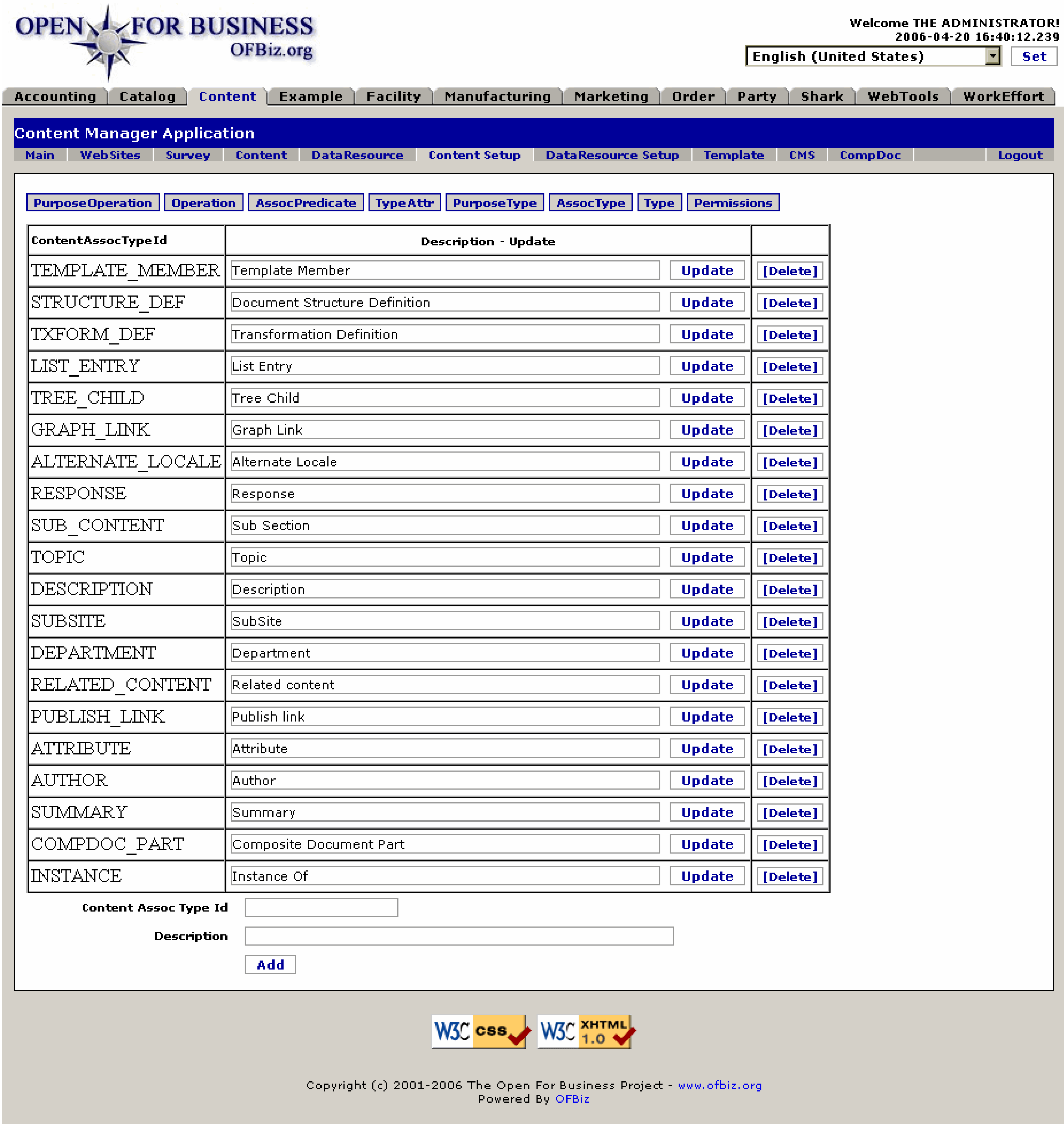
Create your needed Content Purpose Types here. Convention specifies that you use UPPER CASE letters with an underscore '_' between the words.

### .6.6.4.2 Description

Describes or clarifies the Content Purpose Type. Click on the [Add] button when ready to create the Purpose Type.

## .6.7 Assoc Type ID tab

### .6.7.1 EditContentAssocType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2006-04-20 16:40:12.239
English (United States) Set

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Content Manager Application

Main | WebSites | Survey | Content | DataResource | Content Setup | DataResource Setup | Template | CMS | CompDoc | Logout

PurposeOperation | Operation | AssocPredicate | TypeAttr | PurposeType | AssocType | Type | Permissions

| ContentAssocTypeId | Description - Update | | |
|---|---|---|---|
| TEMPLATE_MEMBER | Template Member | Update | [Delete] |
| STRUCTURE_DEF | Document Structure Definition | Update | [Delete] |
| TXFORM_DEF | Transformation Definition | Update | [Delete] |
| LIST_ENTRY | List Entry | Update | [Delete] |
| TREE_CHILD | Tree Child | Update | [Delete] |
| GRAPH_LINK | Graph Link | Update | [Delete] |
| ALTERNATE_LOCALE | Alternate Locale | Update | [Delete] |
| RESPONSE | Response | Update | [Delete] |
| SUB_CONTENT | Sub Section | Update | [Delete] |
| TOPIC | Topic | Update | [Delete] |
| DESCRIPTION | Description | Update | [Delete] |
| SUBSITE | SubSite | Update | [Delete] |
| DEPARTMENT | Department | Update | [Delete] |
| RELATED_CONTENT | Related content | Update | [Delete] |
| PUBLISH_LINK | Publish link | Update | [Delete] |
| ATTRIBUTE | Attribute | Update | [Delete] |
| AUTHOR | Author | Update | [Delete] |
| SUMMARY | Summary | Update | [Delete] |
| COMPDOC_PART | Composite Document Part | Update | [Delete] |
| INSTANCE | Instance Of | Update | [Delete] |

Content Assoc Type Id

Description

Add

W3C CSS W3C XHTML 1.0



Description of the Content Association Type can be updated; invalid types can be deleted; or new types can be added.

### .6.7.2 link buttons

[Update] [Delete] [Add] [PurposeOperation] [Operation] [AssocPredicate] [TypeAttr] [PurposeType] [AssocType] [Type] [Permissions]

### .6.7.3 Table

Table of existing Association IDs.

#### .6.7.3.1 ContentAssocTypeID

The name or title of the ContentAssocType.

#### .6.7.3.2 Description

The Description can be edited here in the table. Click the [Update] button when finished.

### .6.7.4 Tool

Tool to add new Association IDs.

#### .6.7.4.1 ContentAssocTypeID

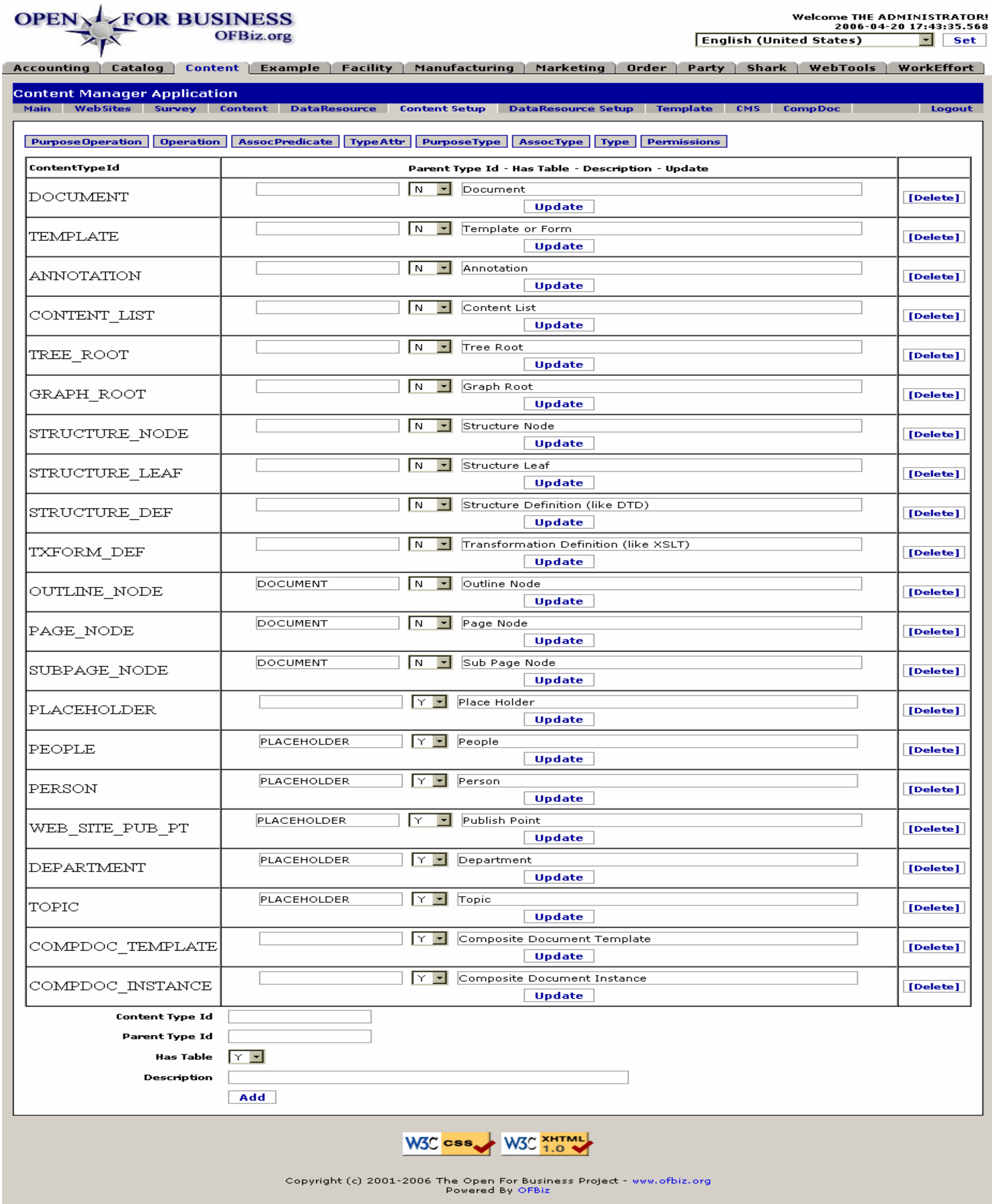
You can enter any ID that you would care to use. Convention is to use ALL CAPITAL letters with an underscore '_' between letters.

#### .6.7.4.2 Description

Describe the Content Association type here in a few words. Then click on the [Add] button when finished.

## .6.8 Type tab

### .6.8.1 EditContentType




Content Type is created, updated or deleted at this screen.

### .6.8.2 link buttons

[Update] [Delete] [Add] [PurposeOperation] [Operation] [AssocPredicate] [TypeAttr] [PurposeType] [AssocType] [Type] [Permissions]

### .6.8.3 Table

Table of existing types.

#### .6.8.3.1 Content Type ID

The name given to the Content Type.

#### .6.8.3.2 Parent Type ID

If the Content Type has a Parent Content Type, specify that here. This must be entered exactly for the relationship to be established. This field can be edited here in the table; click on [Update] when finished.

#### .6.8.3.3 Has Table (Y/N)

If a table is associated with this Content Type, set the flag to Y; if not, set to N. This can be changed within the table.

#### .6.8.3.4 Description

The Description of the Content Type can be edited here within the table; click on [Update] when completed.

### .6.8.4 Tool

Tool to add new types.

#### .6.8.4.1 Content Type ID

When you create a new Content Type, specify a unique ID for it in this field. Convention calls for ALL CAPITAL letters, with an underscore '_' between words.

### .6.8.4.2 Parent Type ID

The Parent Type ID must already exist, if used, but a Parent need not be entered.

### .6.8.4.3 Has Table (Y/N)

If a table is to be associated with this Content Type, set this flag to Y; otherwise leave it at N.

### .6.8.4.4 Description

Describe the Content Type in this field. Click on the [Add] button when ready.

## .6.9 Permissions tab

### .6.9.1 UserPermissions

Under development.

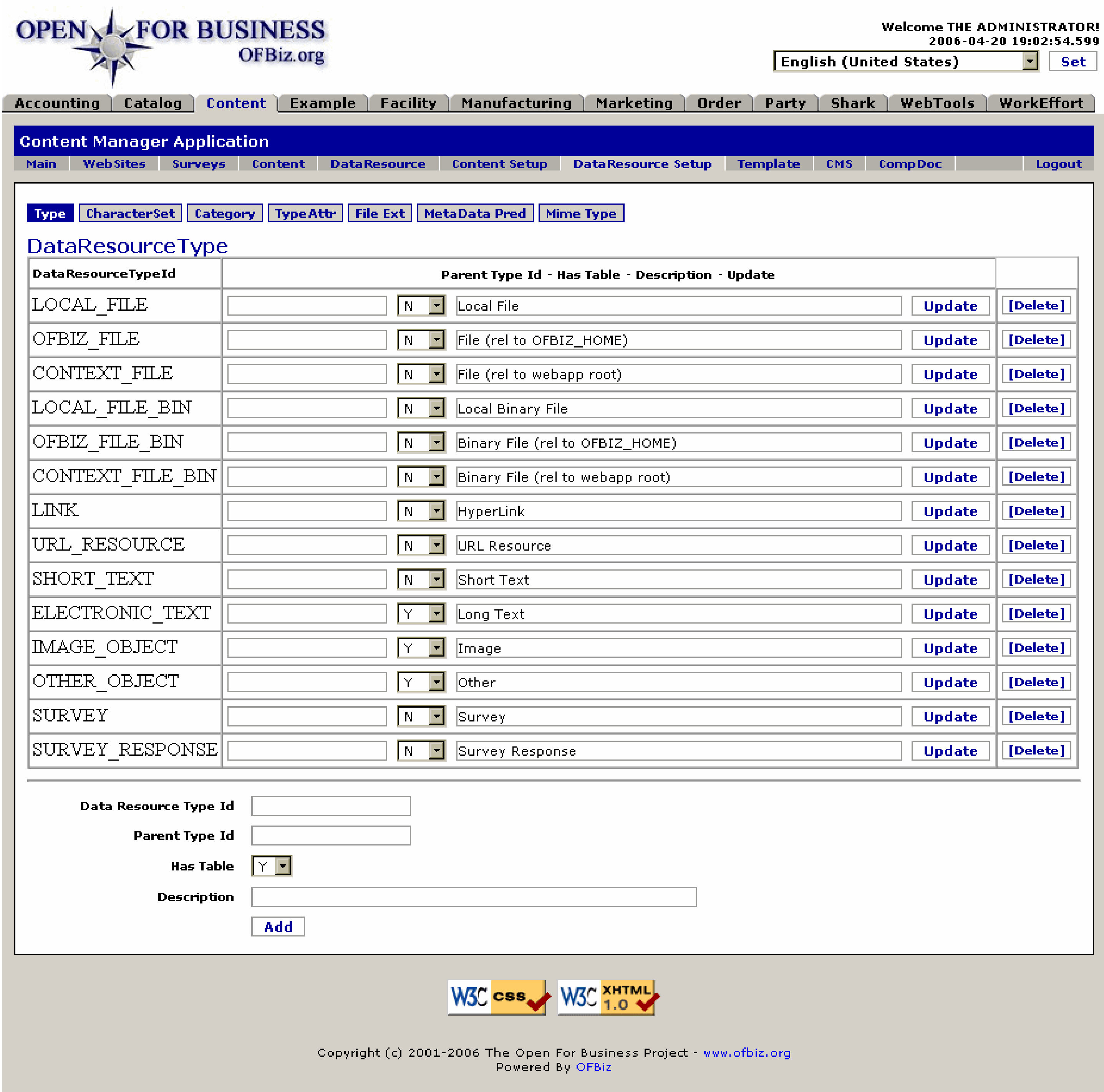
### .6.9.2 link buttons

[Delete] [Add] [PurposeOperation] [Operation] [AssocPredicate] [TypeAttr] [PurposeType] [AssocType] [Type] [Permissions]

## .7 Data Resource Setup

### .7.1 Data Resource Type

#### .7.1.1 EditDataResourceType




Edit an existing Data Resource Type or add a new Type at this screen.

### .7.1.2 link buttons

[Update] [Delete] [Add] [Type] [CharacterSet] [Category] [TypeAttr] [File Ext] [MetaData Pred] [Mime Type]

### .7.1.3 Table

Table of existing Data Resource Types.

#### .7.1.3.1 DataResourceTypeID

The DR Type described on this line of the table.

#### .7.1.3.2 Parent Type ID

If this Data Resource Type is the child of another Type, the Parent Type will be given in this field. This field can be edited; click on [Update] in this row when any change has been made.

#### .7.1.3.3 Has Table (Y/N)

When a Table is associated with this Data Resource Type, this flag should be set to Y; otherwise keep it set to N.

#### .7.1.3.4 Description

Here you have the purpose or intention for this Data Resource Type described. This may also be changed here within the table; click on [Update] when finished.

### .7.1.4 Tool

Tool to add new Associations.

#### .7.1.4.1 Data ResourceTypeID

You create the Data Resource Type by naming it here. In fact, this is the only field you need to complete before clicking on [Add]. Each of the other fields can be completed within the table.

Convention calls for the ID to contain ALL CAPITAL letters, with words connected by an underscore '_'.

### .7.1.4.2 Parent Type ID

If there is a Parent Data Resource Type, you can specify it here. This must be entered correctly for the relationship to be made.

### .7.1.4.3 Has Table (Y/N)

If there is a Table associated with this Data Resource Type, set the flag to Y; if not, set it to N.

### .7.1.4.4 Description

The Description should be concise, yet give enough information so that users will understand the function or purpose of the Data Resource Type.

## .7.2 Character Set tab

### .7.2.1 EditCharacterSet


Edit an existing Character Set description within the table, or add another Character Set with the tool, below.

### .7.2.2 link buttons

[Update] [Delete] [Add] [Type] [CharacterSet] [Category] [TypeAttr] [File Ext] [MetaData Pred] [Mime Type]

## .7.2.3 Table

Table of existing Data Resource Character Sets.

### .7.2.3.1 CharacterSetID

Locate the Character Set in this column.

### .7.2.3.2 Description

The Description column contains further information about the Character Set. The contents of this Column may be edited within the table; click on [Update] when changes are complete within the row

## .7.2.4 Tool

Tool to add new Character Set IDs.

### .7.2.4.1 CharacterSetID

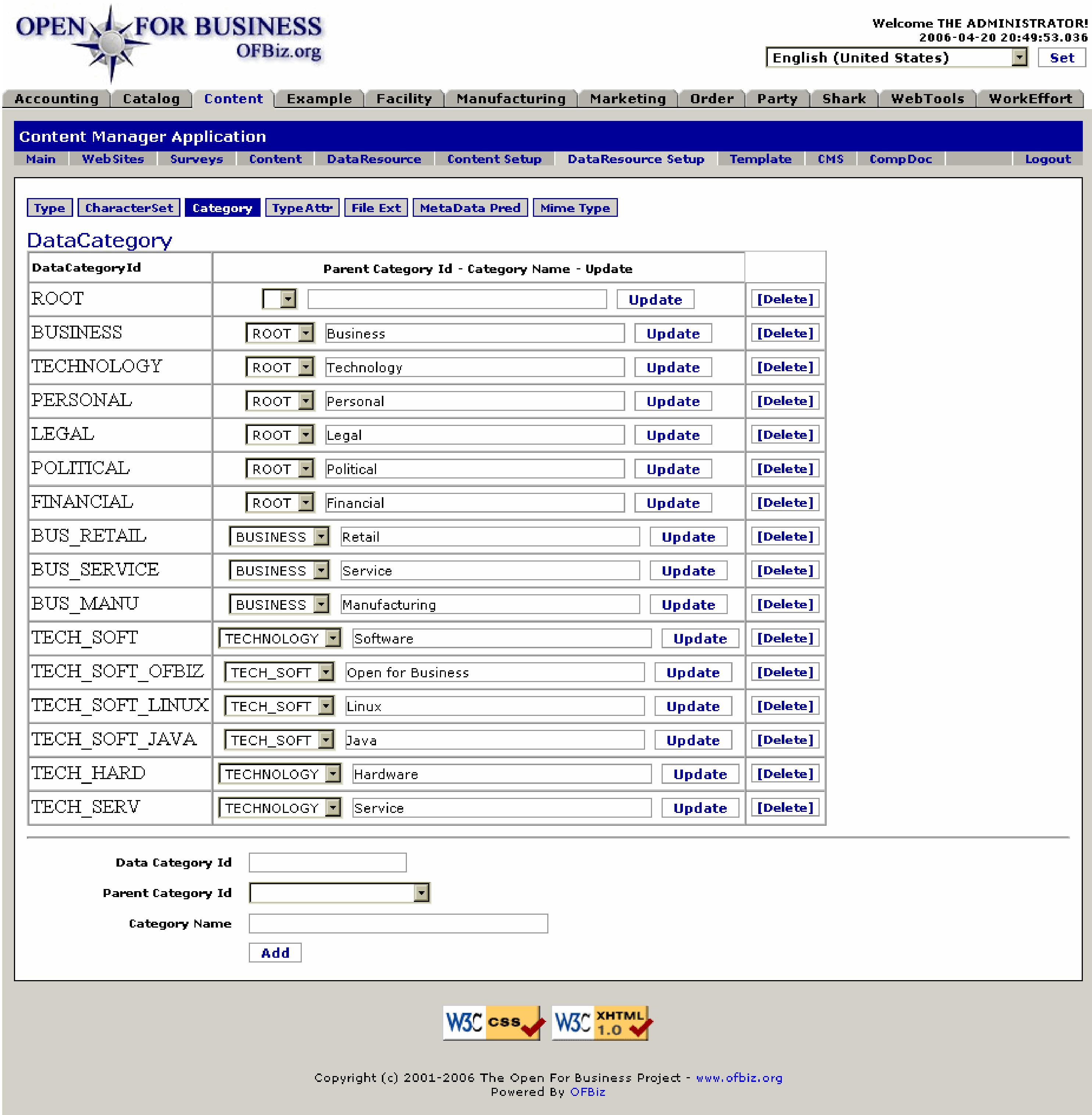
Create a new Character Set ID in this field. Convention calls for UPPER CASE letters and numbers, with hyphens as needed.

### .7.2.4.2 Description

Enter a concise description of the Character Set here.

## .7.3 DataCategory tab

### .7.3.1 EditDataCategory




Update the Data Category ID Parent Category or name, and add a new or delete an old Data Category ID at this screen.

## .7.3.2 link buttons

[Update] [Delete] [Add] [Type] [CharacterSet] [Category] [TypeAttr] [File Ext] [MetaData Pred] [Mime Type]

## .7.3.3 Table

Table of existing Data Category IDs.

### .7.3.3.1 DataCharacterID

The identity of the Data Character. This field cannot be modified.

### .7.3.3.2 Parent Category ID (drop-down box)

Previously established categories are listed in the drop-down box; select the correct Parent from that listed.

### .7.3.3.3 Category Name

Edit or change the Category Name here within the table; click on [Update] link when finished.

## .7.3.4 Tool

Tool to add new Data Category IDs.

### .7.3.4.1 DataCategory ID

Create the new Data Category ID here.

### .7.3.4.2 Parent Category ID (drop-down box)

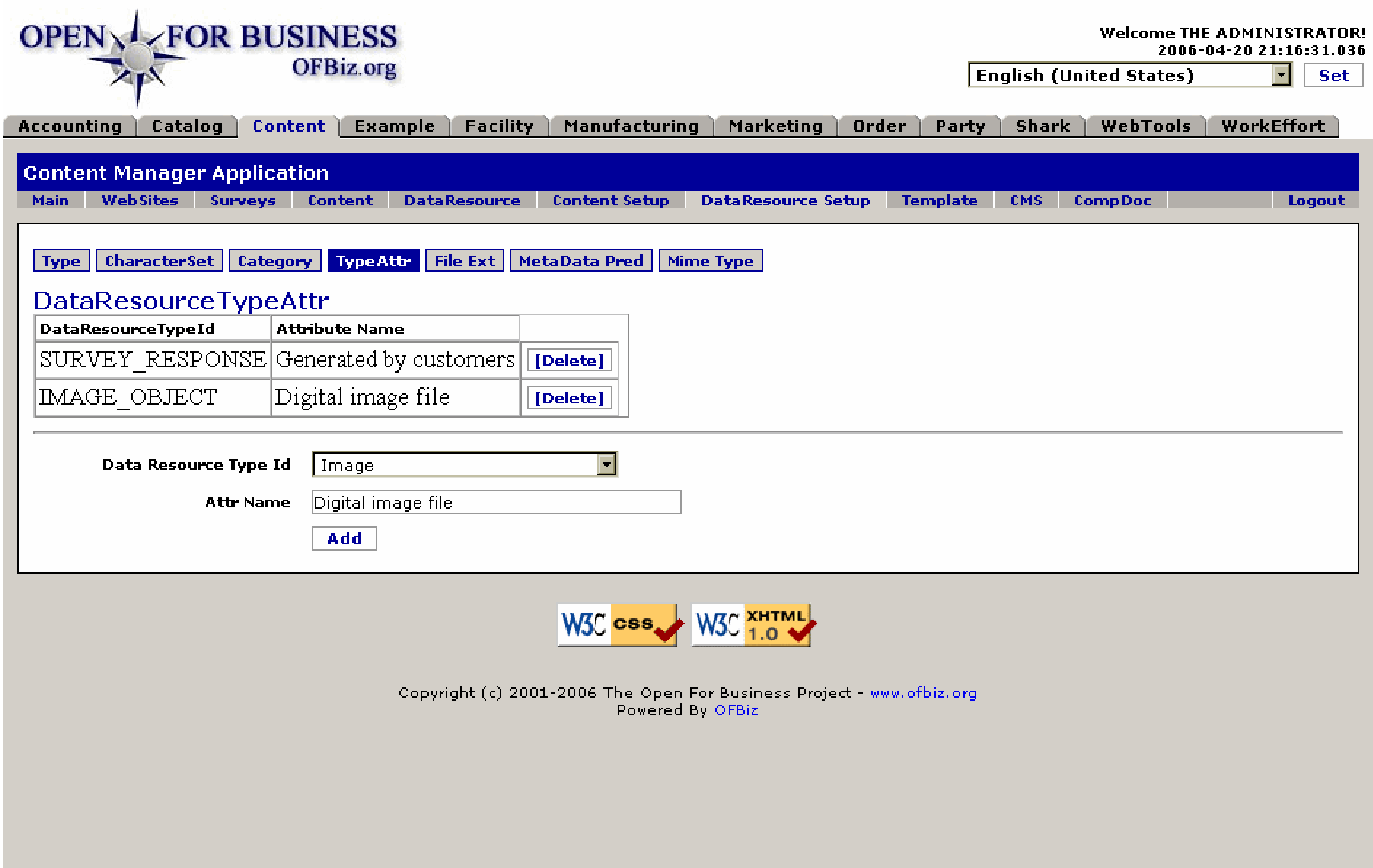
All of the existing Category IDs are listed on the drop-down box. If the new Category ID is a child of another, select its parent from here.

### .7.3.4.3 Category Name

Give a simple Name to describe this Data Category here. When you have entered all of the fields, click on the [Add] button.

## .7.4 TypeAttr tab

### .7.4.1 EditDataResourceTypeAttr




View, delete, or create a new Attribute for a Data Resource type at this screen.

### .7.4.2 link buttons

[Delete] [Add] [Type] [CharacterSet] [Category] [TypeAttr] [File Ext] [MetaData Pred] [Mime Type]

### .7.4.3 Table

Table of existing DataResourceType Attributes.

#### .7.4.3.1 Data Resource TypeID

The DR Type ID is listed in this column.

### .7.4.3.2 Attribute Name

The name given to the DR Type.

## .7.4.4 Tool

Tool to add new Data Resource Type Attributes.

### .7.4.4.1 Data Resource TypeID (drop-down box)

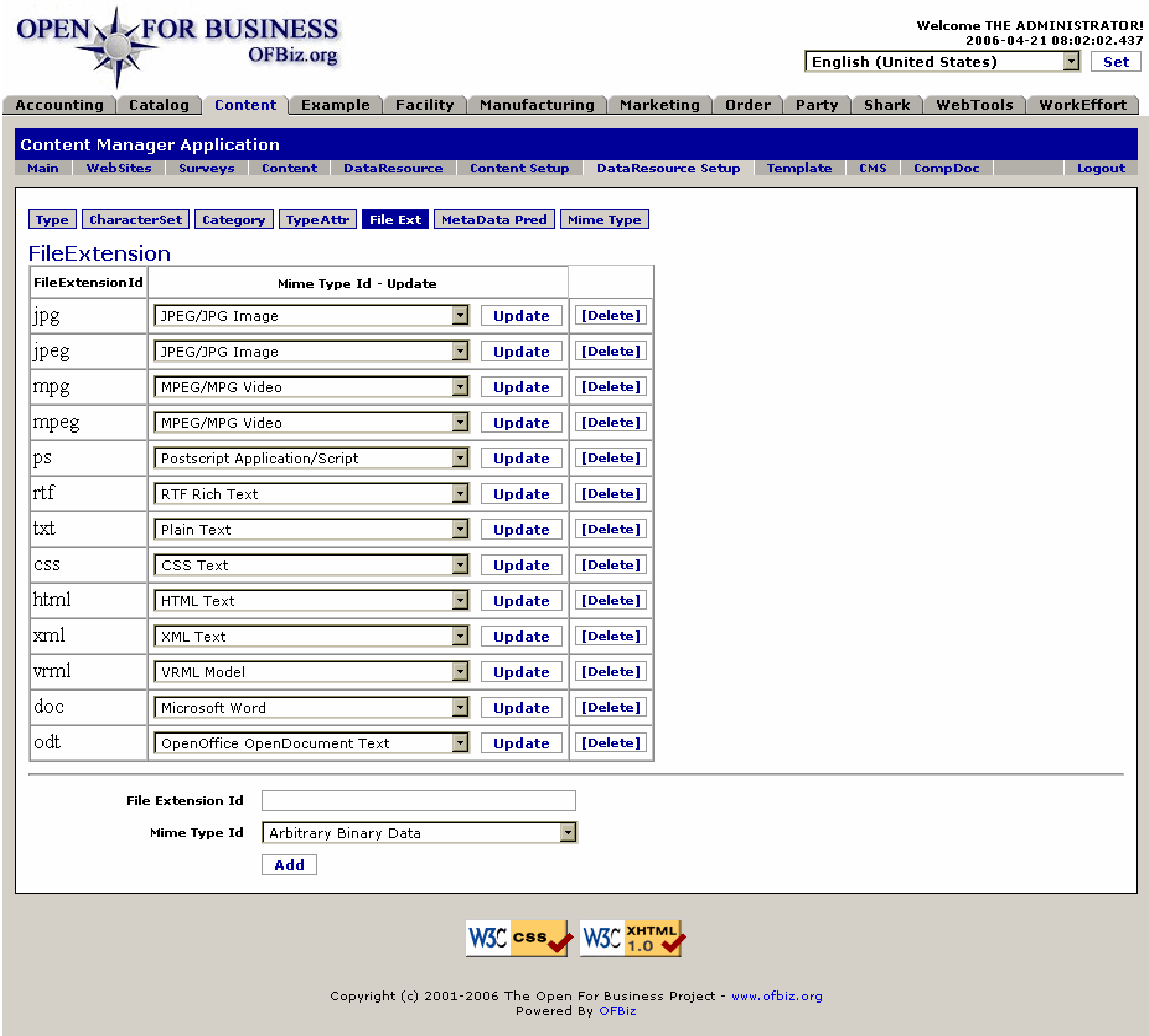
Select a DR Type from the drop-down box.

### .7.4.4.2 Attribute Name

Assign an Attribute to the DR Type in this field, then click on the [Add] button.

## .7.5 FileExtension tab

### .7.5.1 EditFileExtension




File extension IDs (which identify the type of file) are updated, deleted, or added at this screen.

### .7.5.2 link buttons

[Update] [Delete] [Add] [Type] [CharacterSet] [Category] [TypeAttr] [File Ext] [MetaData Pred] [Mime Type]

## .7.5.3 Table

Table of existing FileExtension IDs.

### .7.5.3.1 FileExtension ID

These are the final 2, 3 or 4 characters in the file name which identify the type of file.

### .7.5.3.2 Mime Type ID (drop-down box)

You can re-assign the existing File Extension ID to another Mime Type by selecting it from the drop-down box. If there needs to be changes to the Mime Type, go to the Mime Type tab to make changes there first, then return here.

## .7.5.4 Tool

Tool to add new FileExtension IDs.

### .7.5.4.1 File Extension ID

Begin the addition of another File Extension ID by placing the characters in this field.

### .7.5.4.2 Mime Type ID (drop-down box)

When adding a new File Extension ID, you probably will need to add the Mime Type to the list under the Mime Type tab. After that has been done, return here, select the new Mime Type from the drop down box, then click on [Add].

## .7.6 MetaDataPredicate tab

### .7.6.1 EditMetaDataPredicate


Delete, update the Description of, or add a new MetaDate Predicate at this screen.

### .7.6.2 link buttons

[Update] [Delete] [Add] [Type] [CharacterSet] [Category] [TypeAttr] [File Ext] [MetaData Pred] [Mime Type]

### .7.6.3 Table

Table of existing MetaDataPredicate IDs.

### .7.6.3.1 MetaDataPredicateID

These are the Meta Data Predicates that you might want to use with a Data item.

### .7.6.3.2 Description

You can edit the Description of the Predicate here. Click on [Update] to complete the changes.

## .7.6.4 Tool

Tool to add new MetaDataPredicate IDs.

### .7.6.4.1 MetaDataPredicateID

Assign your own Meta Data Predicate ID from this field. Convention calls for all lower case letters, with the words connected by hyphens.

### .7.6.4.2 Description

Describe your new Meta Data Predicate in this field. Click [Add] when finished.

## .7.7 Mime Type

### .7.7.1 EditMimeType

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Welcome THE ADMINISTRATOR!
2006-04-21 09:38:15.281
English (United States) Set

Accounting | Catalog | Content | Example | Facility | Manufacturing | Marketing | Order | Party | Shark | WebTools | WorkEffort

Content Manager Application

Main | WebSites | Surveys | Content | DataResource | Content Setup | DataResource Setup | Template | CMS | CompDoc | Logout

Type | CharacterSet | Category | TypeAttr | File Ext | MetaData Pred | Mime Type

## MimeType

| MimeTypeId | Description - Update | | |
|---|---|---|---|
| application/octet-stream | Arbitrary Binary Data | Update | [Delete] |
| application/postscript | Postscript Application/Script | Update | [Delete] |
| application/zip | ZIP Data | Update | [Delete] |
| application/pdf | Adobe Portable Document Format (PDF) | Update | [Delete] |
| application/msword | Microsoft Word | Update | [Delete] |
| application/vnd.oasis.opendocument.text | OpenOffice OpenDocument Text | Update | [Delete] |
| application/vnd.ofbiz.survey | Survey | Update | [Delete] |
| application/vnd.ofbiz.survey.response | Survey Response | Update | [Delete] |
| audio/basic | Basic Audio | Update | [Delete] |
| audio/mpeg | MPEG Audio | Update | [Delete] |
| image/jpeg | JPEG/JPG Image | Update | [Delete] |
| image/gif | GIF Image | Update | [Delete] |
| image/tiff | TIFF Image | Update | [Delete] |
| image/png | PNG Image | Update | [Delete] |
| message/external-body | External Body Message | Update | [Delete] |
| message/http | HTTP Message | Update | [Delete] |
| message/s-http | HTTPS/S-HTTP Message | Update | [Delete] |
| message/news | News Message | Update | [Delete] |
| message/partial | Partial Message | Update | [Delete] |
| message/rfc822 | RFC 822 Headered Message | Update | [Delete] |
| model/mesh | Mesh Model | Update | [Delete] |
| model/vrml | VRML Model | Update | [Delete] |
| multipart/alternative | Mutliple Alternative Multipart | Update | [Delete] |
| multipart/digest | Digest of Messages Multipart | Update | [Delete] |
| multipart/encrypted | Encrypted Multipart | Update | [Delete] |
| multipart/form-data | Form Data Multipart | Update | [Delete] |
| multipart/mixed | Mixed Type Multipart | Update | [Delete] |
| multipart/related | Related Multipart | Update | [Delete] |
| multipart/signed | Signed Multipart | Update | [Delete] |
| text/plain | Plain Text | Update | [Delete] |
| text/enriched | Enriched Text | Update | [Delete] |
| text/richtext | Rich Text | Update | [Delete] |
| text/rtf | RTF Rich Text | Update | [Delete] |
| text/tab-separated-values | Tab Separated Value Text | Update | [Delete] |
| text/css | CSS Text | Update | [Delete] |
| text/html | HTML Text | Update | [Delete] |
| text/sgml | SGML Text | Update | [Delete] |
| text/xml | XML Text | Update | [Delete] |
| video/mpeg | MPEG/MPG Video | Update | [Delete] |
| video/quicktime | Quicktime Video | Update | [Delete] |

Mime Type Id

Description

Add

W3C CSS W3C XHTML 1.0



Mime Types and their Descriptions are updated, added or deleted from this screen.

### .7.7.2 link buttons

[Update] [Delete] [Add] [Type] [CharacterSet] [Category] [TypeAttr] [File Ext] [MetaData Pred] [Mime Type]

### .7.7.3 Table

Table of existing Mime Type IDs.

#### .7.7.3.1 MimeTypeID

Each Mime Type ID has a class (application, image, text, etc.) and a unique name (basic, jpeg, rtf, etc.). Together they comprise the Mime Type ID.

#### .7.7.3.2 Description

This field completes the Mime Type ID with a description of where or how it is used. These are also associated with the File Extensions; see that tab, above.

### .7.7.4 Tool

Tool to add new MetaDataPredicate IDs.

#### .7.7.4.1 MimeTypeID

Enter the new Mime Type ID here. Convention calls for lower case letters with a forward slash ( / ) between the class and the name.

#### .7.7.4.2 Description

Use a few concise words to describe how the Mime Type is used. When ready, click on the [Add] button.

# .8 Template

## .8.1 List

### .8.1.1 ListLayout


If you have created templates, they are presented in the table at this screen.

### .8.1.2 link buttons

[Delete] [Create New] [List] [Find] [Layout]

### .8.1.3 View

Click on the ID to view the file under the Layout sub-tab.

### .8.1.4 Content Name

The name assigned to this content.

### .8.1.5 Description

Tells a little more about the Content.

### .8.1.6 Template File

The electronic address to the template associated with this Content.

## .8.2 Find

### .8.2.1 FindLayout

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Welcome THE ADMINISTRATOR!
2006-04-24 10:13:06.312
English (United States) | Set

Accounting | Catalog | Content | Example | Facility | Manufacturing | Marketing | Order | Party | Shark | WebTools | WorkEffort

Content Manager Application

Main | WebSites | Surveys | Content | DataResource | Content Setup | DataResource Setup | Template | CMS | CompDoc | Logout

List | Find | Layout

## ContentDataResourceView

Content Id: ( ) Equals ( ) Begins With ( ) Contains ( ) Is Empty [ ] Ignore Case

Content Name: ( ) Equals ( ) Begins With ( ) Contains ( ) Is Empty [ ] Ignore Case

Description: ( ) Equals ( ) Begins With ( ) Contains ( ) Is Empty [ ] Ignore Case

Created By User Login:

Created Date: ( ) Equals ( ) Same Day ( ) Greater Than From Day Start ( ) Greater Than ( ) Less Than ( ) Up To Day ( ) Up Thru Day ( ) Is Empty

Last Modified By User Login:

Last Modified Date: ( ) Equals ( ) Same Day ( ) Greater Than From Day Start ( ) Greater Than ( ) Less Than ( ) Up To Day ( ) Up Thru Day ( ) Is Empty

Find

Create New

| Edit | Clip | Content Name | Description | Template File | |
|---|---|---|---|---|---|
| LEFTBAR | LEFTBAR | Left Bar | Left Bar | /leftbar.ftl | [Delete] |
| TMPLT_IMG_CENTER | TMPLT_IMG_CENTER | Image Centered | Image centered above text | | [Delete] |
| TEMPLATE_IMAGE_LEFT | TEMPLATE_IMAGE_LEFT | Image Left | Image with text flowing around | | [Delete] |
| TEMPLATE_TEXT_ONLY | TEMPLATE_TEXT_ONLY | Template Text | Template Text Only | | [Delete] |
| VIEW_WRAP | VIEW_WRAP | View Wrap | | /hot-deploy/blog/webapp/blog/ViewWrap.ftl | [Delete] |
| WRAP_ARTICLE | WRAP_ARTICLE | | | | [Delete] |
| WRAP_STD_001 | WRAP_STD_001 | Standard SubContent Wrapper | Standard SubContent Wrapper | | [Delete] |
| WRAP_STD_LOOP | WRAP_STD_LOOP | Loop Wrap | | | [Delete] |
| WRAP_VIEW | WRAP_VIEW | | | | [Delete] |
| ARTICLE_WRAP | ARTICLE_WRAP | | | /hot-deploy/blog/webapp/blog/ArticleWrap.ftl | [Delete] |



Use the search tool (above) and the table (below) to locate an existing Content Data Resource to view.

## .8.2.2 link buttons

[Find] [Create New] [Delete] [List] [Find] [Layout]

## .8.2.3 Search fields

### .8.2.3.1 Content ID

If you know the assigned Content ID, enter it directly. For search on a partial ID, use the Radio buttons: Equals / Begins With / Contains / Is Empty

Use the check box Ignore Case to disregard UPPER / lower case distinctions.

### .8.2.3.2 Content Name

If you know the assigned Content Name, enter it directly. For search on a partial ID, use the Radio buttons:

Equals / Begins With / Contains / Is Empty.

Use the check box Ignore Case to disregard UPPER / lower case distinctions.

### .8.2.3.3 Description

If you know part or all of the Description, enter what you know. For search on a partial Description, use the Radio buttons: Equals / Begins With / Contains / Is Empty.

Use the check box Ignore Case to disregard UPPER / lower case distinctions.

### .8.2.3.4 Created By User Login (popup screen)

Enter the UserLogin of the party that created the Content, or use the popup search tool to locate their UserLogin.

### .8.2.3.5 Created Date

Contains two popup calendars with associated Radio buttons: one for

- Equals
- Same Day
- Greater Than From Day Start

- Greater Than

The other calendar with Radio buttons for

- Less
- Than
- Up To Day
- Up Thru Day
- Is Empty

### .8.2.3.6 Last Modified by User Login (popup screen)

If you know who last modified the Content, you can search on this parameter.

### .8.2.3.7 Last Modified Date

Contains two popup calendars with associated Radio buttons: one for

- Equals
- Same Day
- Greater Than From Day Start
- Greater Than

The other calendar with Radio buttons for

- Less
- Than
- Up To Day
- Up Thru Day
- Is Empty

## .8.2.4 Table of existing Templates

Click on the ID under Edit or Clip to be taken with that ID to the Layout - Content Data Resource View screen.

### .8.2.4.1 Edit

If you click on the ID here, you are taken to the Layout screen for this ID. Path is:

https://localhost:8443/content/control/EditLayout?contentId=LEFTBAR&drDataResourceId=LEFTBAR

## .8.2.4.2 Clip

If you click on this ID, you are returned to this Table with only this line item showing. Click the ID in the Edit column to go to the Layout screen.

Path for this link is: https://localhost:8443/content/control/clipFindLayout?contentId=LEFTBAR&drDataResourceId=LEFTBAR&viewSize=10&viewIndex=0&entityName=ContentDataResourceView

## .8.2.4.3 Content Name

Name given to the Content.

## .8.2.4.4 Description

Purpose or function for the Content.

## .8.2.4.5 Template File

Filename and path to the Content.

# .8.3 Layout

## .8.3.1 EditLayout


View the Template Layout from this screen. Follow the link buttons for further editing opportunities.

## .8.3.2 link buttons

[Clone Layout] [Find] [New] [Edit] [List] [Find] [Layout]

## .8.3.3 Content ID

How the Content is known in the system.

## .8.3.4 Content Type

What type of content? Document, Template, PlaceHolder, etc.

### .8.3.5 Parent Content

If this is a Child Content Item, which is its parent.

### .8.3.6 Map Key

If a Map Key is assigned, it will be given here.

### .8.3.7 Data Resource ID

ID of the related Data Resource is given here.

### .8.3.8 Content Name

What the Content is called.

### .8.3.9 Description

What is the purpose or function of the Content.

### .8.3.10 DrData Resource Type ID

The Data Resource Type ID for the Data Resource.

### .8.3.11 DrMime Type ID

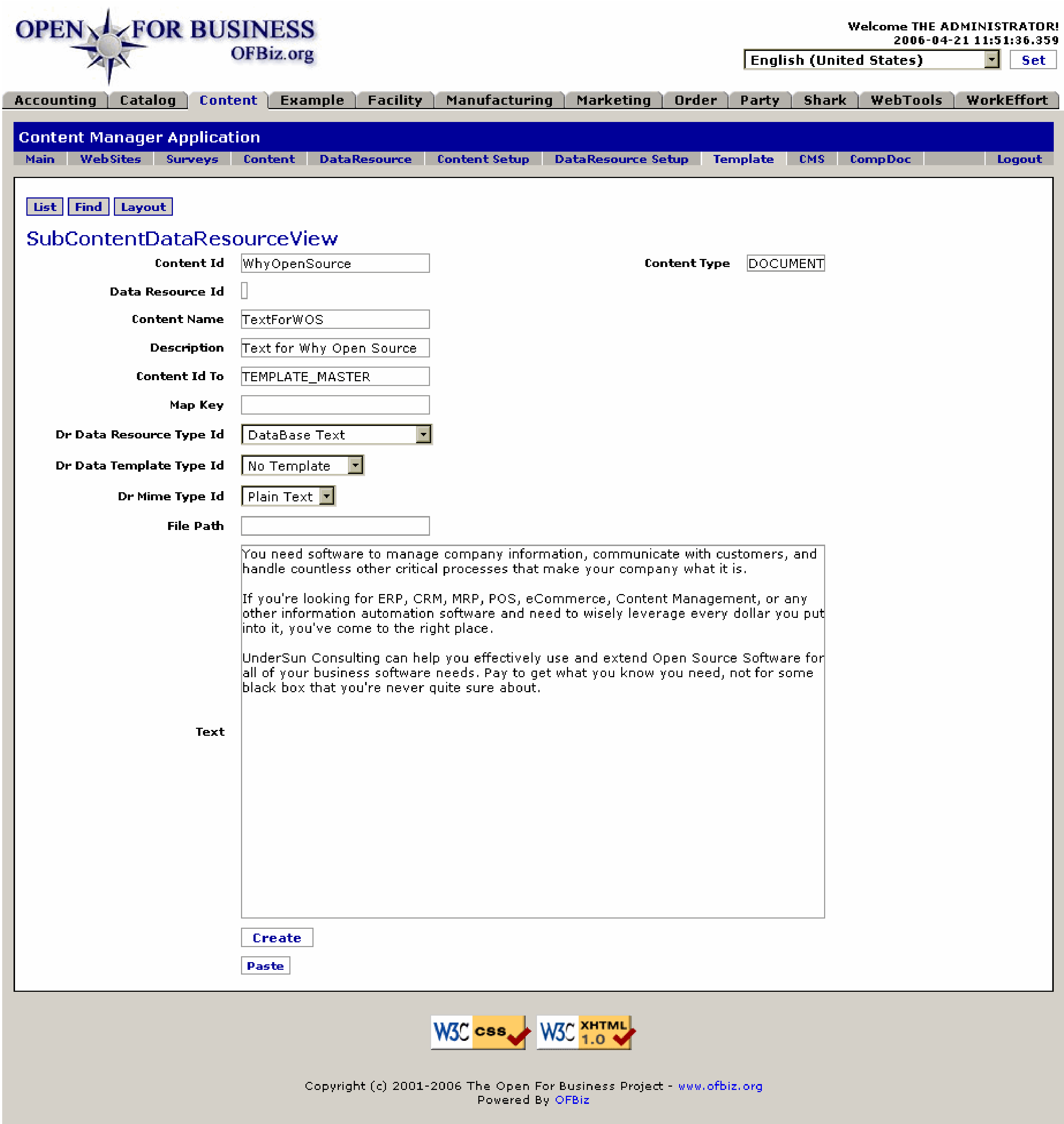
The Mime Type ID of the Data Resource.

### .8.3.12 File Path

The path to the location of the file.

## .8.4 Create New resource

### .8.4.1 EditLayoutSubContent




Create new Data Resource SubContent at this screen.

## .8.4.2 link buttons

[Create] [Paste] [List] [Find] [Layout]

## .8.4.3 Content ID

Enter the Content ID you wish to use here. This will be the Identity by which it is known within the system.

## .8.4.4 Content Type

What Type of Content this is, a Document, a Template, etc.

## .8.4.5 Data Resource ID

If this is also identified as a Data Resource, that ID could be here.

## .8.4.6 Content Name

The Name is how this Content will be known.

## .8.4.7 Description

Describe what this Content is for or what it is to do.

## .8.4.8 Content ID To

What is the ID of the Content this is related to or associated with.

## .8.4.9 Map Key

If there is a Map Key assigned, give that here.

## .8.4.10 Dr Data Resource Type ID (drop-down box)

Select the Data Resource Type from the drop-down box.

## .8.4.11 Dr Data Template Type ID (drop-down box)

Select the Data Template Type from the drop-down box.

## .8.4.12 Dr Mime Type ID (drop-down box)

Select the Mime Type from the drop-down box.

## .8.4.13 File Path

Speciy the file name and path to where this Content can be found.

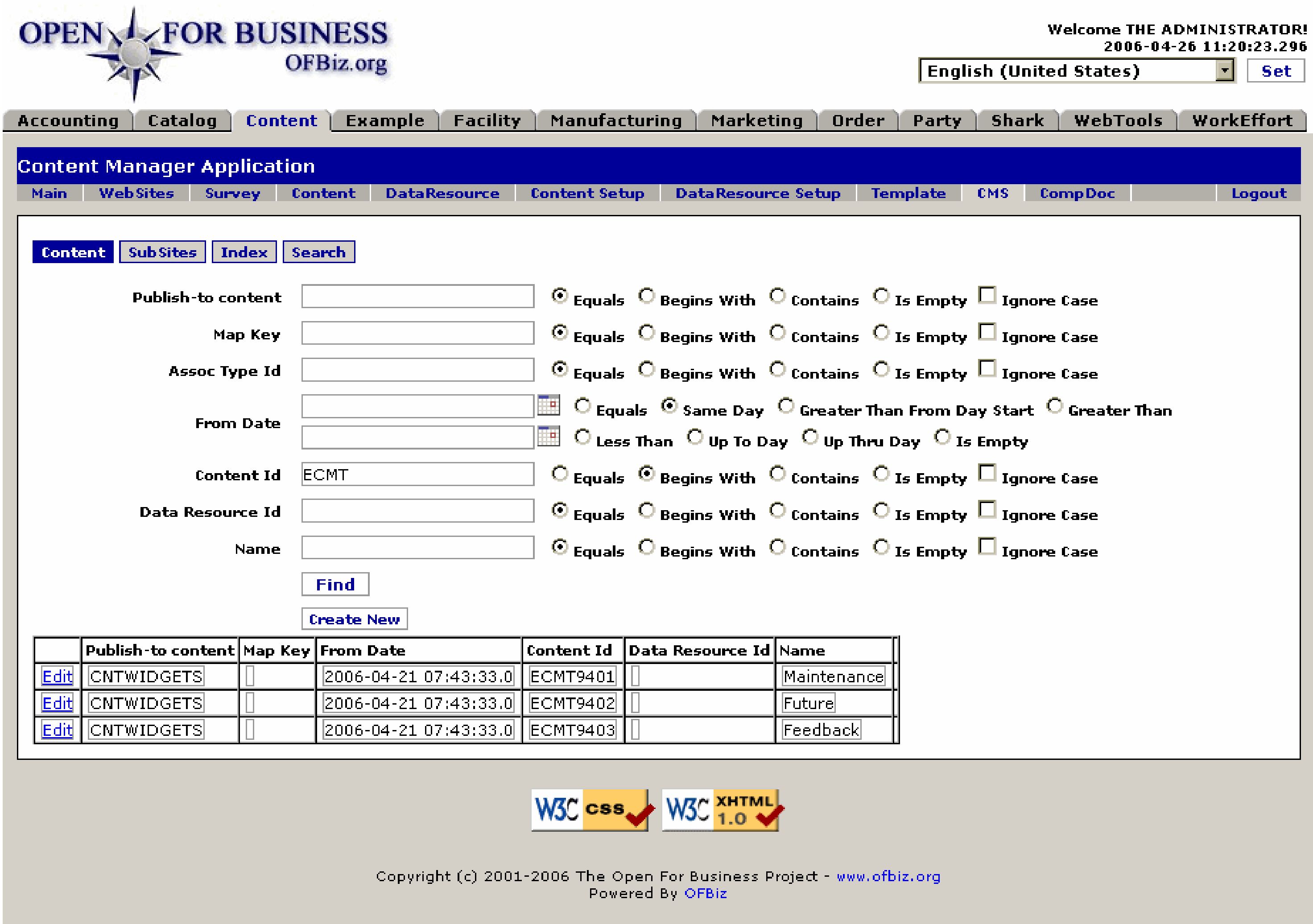
## .8.4.14 Text

Create the Text for this Content here in the box.

# .9 CMS (Content Management System)

## .9.1 Find Content

### .9.1.1 CMSContentFind




Find Content from known parameters with the tool, above, then selecting from the table beneath.

### .9.1.2 link buttons

[Find] [Create New] [Next] [Previous] [Content] [SubSites] [Index] [Search]

# .9.1.3 Search Tool

## .9.1.3.1 Publish-to Content

Partial Publish-to Content is adequate. Pair up this with a corresponding Radio Button: Equals / Begins With / Contains / Is Empty.

Unless search is Case Sensitive to UPPER/lower case, check the Ignore Case box.

## .9.1.3.2 Map Key

Partial Map Key is adequate. Pair up this with a corresponding Radio Button: Equals / Begins With / Contains / Is Empty .

Unless search is Case Sensitive to UPPER/lower case, check the Ignore Case box.

## .9.1.3.3 Assoc Type ID

Partial ID is adequate. Pair up this with a corresponding Radio Button: Equals / Begins With / Contains / Is Empty .

Unless search is Case Sensitive to UPPER/lower case, check the Ignore Case box.

## .9.1.3.4 From Date

Contains two popup calendars with associated radio buttons: one for

- Equals
- Same Day
- Greater
- Than From Day Start
- Greater Than

The other calendar with Radio buttons for

- Less Than
- Up To Day
- Up Thru Day
- Is Empty

### .9.1.3.5 Content ID

Partial Content ID is adequate. Pair up this with a corresponding Radio Button: Equals / Begins With / Contains / Is Empty .

Unless search is Case Sensitive to UPPER/lower case, check the Ignore Case box.

### .9.1.3.6 Data Resource ID

Partial ID is adequate. Pair up this with a corresponding Radio Button: Equals / Begins With / Contains / Is Empty .

Unless search is Case Sensitive to UPPER/lower case, check the Ignore Case box.

### .9.1.3.7 Name

Partial Name is adequate. Pair up this with a corresponding Radio Button: Equals / Begins With / Contains / Is Empty .

Unless search is Case Sensitive to UPPER/lower case, check the Ignore Case box.

## .9.1.4 Table

### .9.1.4.1 Edit

Click on the [Edit] link associated with the item to see complete details and to update the item.

### .9.1.4.2 Publish-to Content

Which Content is this to be published to.

### .9.1.4.3 Map Key

If there is a map key, that will be given here.

### .9.1.4.4 From Date

When the content became effective.

### .9.1.4.5 Content ID

The assigned identification.

### .9.1.4.6 Data Resource ID

The ID for this Content under the Data Resource umbrella or the Data Resource to which it is assigned.

### .9.1.4.7 Name

The Name by which the Content is known.

### .9.1.5 Create New

#### .9.1.5.1 EditAddContent

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2006-04-26 11:59:37.015
English (United States) | Set

Accounting | Catalog | Content | Example | Facility | Manufacturing | Marketing | Order | Party | Shark | WebTools | WorkEffort

Content Manager Application

Main | WebSites | Survey | Content | DataResource | Content Setup | DataResource Setup | Template | CMS | CompDoc | Logout

Content | SubSites | Index | Search

Goto Find

## ContentAssoc

Content Id To: TEMPLATE_MASTER

MapKey:

ContentAssocTypeId: SUB_CONTENT

ContentAssocPredicateId:

FromDate: 2006-04-21 12:12:02.75

ThruDate:

## Content

Content Id: WhyOpenSource

Template Data Resource Id:

Content Type Id: Document

Owner Content Id:

Title: TextForWOS

Description: Text for Why Open Source

Mime Type Id: text/plain - Plain Text

Character Set Id:

Locale:

Status Id:

Privilege Enum Id:

## DataResource

Data Resource Id: 10000 | Go to Data Resource

Data Resource Type Id: Long Text

File Path:

Data Template Type Id: No Template

Mime Type Id: text/plain - Plain Text

Character Set Id:

Locale:

Data Source:

Data Category:

## Text

Text:

You need software to manage company information, communicate with customers, and handle countless other critical processes that make your company what it is.

If you're looking for ERP, CRM, MRP, POS, eCommerce, Content Management, or any other information automation software and need to wisely leverage every dollar you put into it, you've come to the right place.

UnderSun Consulting can help you effectively use and extend Open Source Software for all of your business software needs. Pay to get what you know you need, not for some black box that you're never quite sure about.

## Image

Image Data: Browse...

Data Created By User: admin

Data Create Date: 2006-04-21 12:12:02.359

Data Modified By User: admin

Data Modified Date: 2006-04-21 12:12:02.359

Upload

You need software to manage company information, communicate with customers, and handle countless other critical processes that make your company what it is. If you're looking for ERP, CRM, MRP, POS, eCommerce, Content Management, or any other information automation software and need to wisely leverage every dollar you put into it, you've come to the right place. UnderSun Consulting can help you effectively use and extend Open Source Software for all of your business software needs. Pay to get what you know you need, not for some black box that you're never quite sure about.



Either Edit existing Content, or create new Content at this screen.

### .9.1.5.2 link buttons

[Goto Find] [Go to Data Resource] [Browse] [Upload] [Content] [Subsites] [Index] [Search]

### .9.1.5.3 ContentAssoc

#### .9.1.5.3.1 Content ID to

This identifies the Parent content.

#### .9.1.5.3.2 MapKey

If there is a Map Key, it may be entered here.

#### .9.1.5.3.3 ContentAssocTypeId

If there is an assigned Content Associate Type, the ID is entered here.

#### .9.1.5.3.4 ContentAssoc PredicateID (drop-down box)

Use the drop-down box to select a Content Associate Predicate, if there is any.

#### .9.1.5.3.5 FromDate (popup calendar)

The Date from which this Content Association became effective. You may use the popup calendar to enter this.

#### .9.1.5.3.6 Thru Date (popup calendar)

If the Content Association is to expire, enter that date here using the popup calendar.

### .9.1.5.4 Content

#### .9.1.5.4.1 Content ID

This cannot be changed without creating new content to replace it.

#### .9.1.5.4.2 Template Data Resource ID (popup search tool)

Enter if known, or select from the popup search box.

#### .9.1.5.4.3 Content Type ID (drop-down box)

Drop-down box presents the existing Types from which to select. Content types might include:

- Document
- Template or Form
- Annotation
- Content List
- Tree Root
- Graph Root
- Structure Node
- Structure Leaf
- Structure Definition (like DTD)
- Transformation Definition
- (like XSLT)
- Outline Node
- Page Node
- Sub Page Node
- Placeholder
- People
- Person
- Publish Point
- Department
- Topic
- Composite Document Template
- Composite Document Instance

### .9.1.5.4.4 Owner Content ID (popup search tool)

Popup search engine to locate the Content of which this content is a part.

### .9.1.5.4.5 Title

Title given to the Content. This can be edited here.

### .9.1.5.4.6 Description

Describe the Content so that it can be differentiated from other, similar Content.

### .9.1.5.4.7 Mime Type ID (drop-down box)

Select from the numerous Mime Types on the drop-down box list. Mime Type ID might include one of the following:

- application/msword - Microsoft Word
- application/octet-stream - Arbitrary Binary Data
- application/PDF - Adobe Portable Document Format (PDF)
- application/postscript - Postscript
- Application/Script
- application/vnd.oasis.opendocument - OpenOffice OpenDocument Text

- application/vnd.ofbiz.survey - Survey
- application/vnd.ofbiz.survey.response - Survey Response
- application/zip - ZIP Data
- audio/basic - Basic Audio
- audio/mpeg - MPEG Audio
- image/gif - GIF
- Image
- image/jpeg - JPEG/JPG Image
- image/png - PNG Image
- image/tiff - TIFF Image
- message/external-body - External Body Message
- message/http - HTTP Message
- message/news -
- News Message
- message/partial - Partial Message
- message/rfc822 - RFC 822 Headered Message
- message/s-http - HTTPS/S-HTTP Message
- model/mesh - Mesh Model
- model/vrml - VRML
- Model
- multipart/alternative - Multiple Alternative Multipart
- multipart/digest - Digest of Messages
- Multipart
- multipart/encrypted - Encrypeted Multipart
- multipart/form-data - Form Data Multipart
- multipart/mixed - Mixed Type Multipart
- multipart/related - Related Multipart
- multipart/signed - Signed
- Multipart
- text/css - CSS Text
- text/enriched - Enriched Text
- text/html - HTML Text
- text/plain -
- Plain Text
- text/richtext - Rich Text
- text/rtf - RTF Rich Text
- text/sgml - SGML Text
- text/tab-separated-values - Tab Separated Value Text
- text/xml - XML Text
- video/mpeg - MPEG/MPG
- Video
- video/quicktime - Quicktime Video

#### .9.1.5.4.8 Character Set ID (drop-down box)

If Content is associated with a Character Set, identify it here. Character Set ID might be one of the following:

- ISO-8859-1 English
- ISO-8859-2 ?
- ISO-8859-3 ?
- ISO-8859-4 ?
- ISO-8859-5 ?
- ISO-8859-6 Latin/Arabic
- ISO-8859-7 ?
- ISO-8859-8 Latin/Hebrew
- ISO-8859-9 ?
- ISO-8859-10 ?
- US-ASCII as defined in ANSI X3.4-1986
- Unicode 8 bit
- Unicode 16 bit

#### .9.1.5.4.9 Locale

You may specify a Locale for the Content in this field.

This field is positioned for to the right side of the screen; you may need to scroll to the right before you can see it.

#### .9.1.5.4.10 Status ID (drop-down box)

Indicates the progress of the Content from conception through completion or rejection. Use the drop-down box to select from:

- Submitted
- Draft
- Published
- Rejected

#### .9.1.5.4.11 Privilege Enum ID (drop-down box)

If Privilege Enumerators have been established, they may be selected from the drop-down box.

### .9.1.5.5 Data Resource

#### .9.1.5.5.1 DataResource ID

If not known, use the popup search tool to locate.

After populated, if further enhancement or editing is desired, click on the [Go to Data Resource] link and you are taken to the

Content > Data Resource > Data Resource sub tab for the selected Data Resource ID.

### .9.1.5.5.2 Data Resource Type Id

Choose from the types listed in the drop-down box.

### .9.1.5.5.3 File Path

The electronic path through folders and sub-folders to specify where the Data Resource is located.

### .9.1.5.5.4 Data Template Type ID (drop-down box)

Select the Data Template Type from the drop-down box list of IDs:

- —
- No Template
- FreeMarker
- Velocity
- WebMacro
- XSLT
- Screen widget

### .9.1.5.5.5 Mime Type ID (drop-down box)

Select from the numerous Mime Types on the drop-down box list. Mime Type ID might include one of the following:

- application/msword - Microsoft Word
- application/octet-stream - Arbitrary Binary Data
- application/PDF - Adobe Portable Document Format (PDF)
- application/postscript - Postscript
- Application/Script
- application/vnd.oasis.opendocument - OpenOffice OpenDocument Text
- application/vnd.ofbiz.survey - Survey
- application/vnd.ofbiz.survey.response - Survey Response
- application/zip - ZIP Data
- audio/basic - Basic Audio
- audio/mpeg - MPEG Audio
- image/gif - GIF
- Image
- image/jpeg - JPEG/JPG Image
- image/png - PNG Image
- image/tiff - TIFF Image
- message/external-body - External Body Message
- message/http - HTTP Message
- message/news -

- News Message
- message/partial - Partial Message
- message/rfc822 - RFC 822 Headered Message
- message/s-http - HTTPS/S-HTTP Message
- model/mesh - Mesh Model
- model/vrml - VRML
- Model
- multipart/alternative - Multiple Alternative Multipart
- multipart/digest - Digest of Messages
- Multipart
- multipart/encrypted - Encrypeted Multipart
- multipart/form-data - Form Data Multipart
- multipart/mixed - Mixed Type Multipart
- multipart/related - Related Multipart
- multipart/signed - Signed
- Multipart
- text/css - CSS Text
- text/enriched - Enriched Text
- text/html - HTML Text
- text/plain -
- Plain Text
- text/richtext - Rich Text
- text/rtf - RTF Rich Text
- text/sgml - SGML Text
- text/tab-separated-values - Tab Separated Value Text
- text/xml - XML Text
- video/mpeg - MPEG/MPG
- Video
- video/quicktime - Quicktime Video

### .9.1.5.5.6 Character Set ID (drop-down box)

If the Data Resource is associated with a Character Set, identify it here. Character Set ID might be one of the following:

- ISO-8859-1 English
- ISO-8859-2 ?
- ISO-8859-3 ?
- ISO-8859-4 ?
- ISO-8859-5 ?
- ISO-8859-6 Latin/Arabic
- ISO-8859-7 ?
- ISO-8859-8 Latin/Hebrew
- ISO-8859-9
- ?

- ISO-8859-10 ?
- US-ASCII as defined in ANSI X3.4-1986
- Unicode 8 bit
- Unicode 16 bit

#### .9.1.5.5.7 Locale

If a Locale is known for this Data Resource, you can enter that here.

#### .9.1.5.5.8 Data Source

If a Source for the Data in this Data Resource is known, that can be entered here.

#### .9.1.5.5.9 Data Category

If a Data Category has been established for the Data Resource, that can be specified here.

### .9.1.5.6 Text

## .9.1.5.6.1 Text content

Take care here to make changes consistent with the text type: either Plain Text or with HTML/XML coding.

### .9.1.5.7 Image

#### .9.1.5.7.1 Image Data

Use the [Browse] link to locate and select Images from files.

### .9.1.5.8 Data Created By User

Reporting field only; cannot be edited.

### .9.1.5.9 Data Create Date

Reporting field only; cannot be edited.

### .9.1.5.10 Data Modified By User

Reporting field only; cannot be edited.

### .9.1.5.11 Data Modified Date

Reporting field only; cannot be edited.

### .9.1.5.12 Content Displayed

At the bottom of the screen, if there is any content, selected content will be displayed as rendered.

## .9.2 SubSite Working Tool

### .9.2.1 CMSSites


The SubSites brings up this working Table with direct links to existing sub-forums.

## .9.2.2 link buttons

[Moderate] [User Roles] [Add Child Forum] [Remove Site] [Add Top Level Forum] [Content] [Subsites] [Index] [Search]

## .9.2.3 Link to'Moderate' the site

Takes you to a working screen for managing the selected site.

## .9.2.4 Assign 'User Roles' link

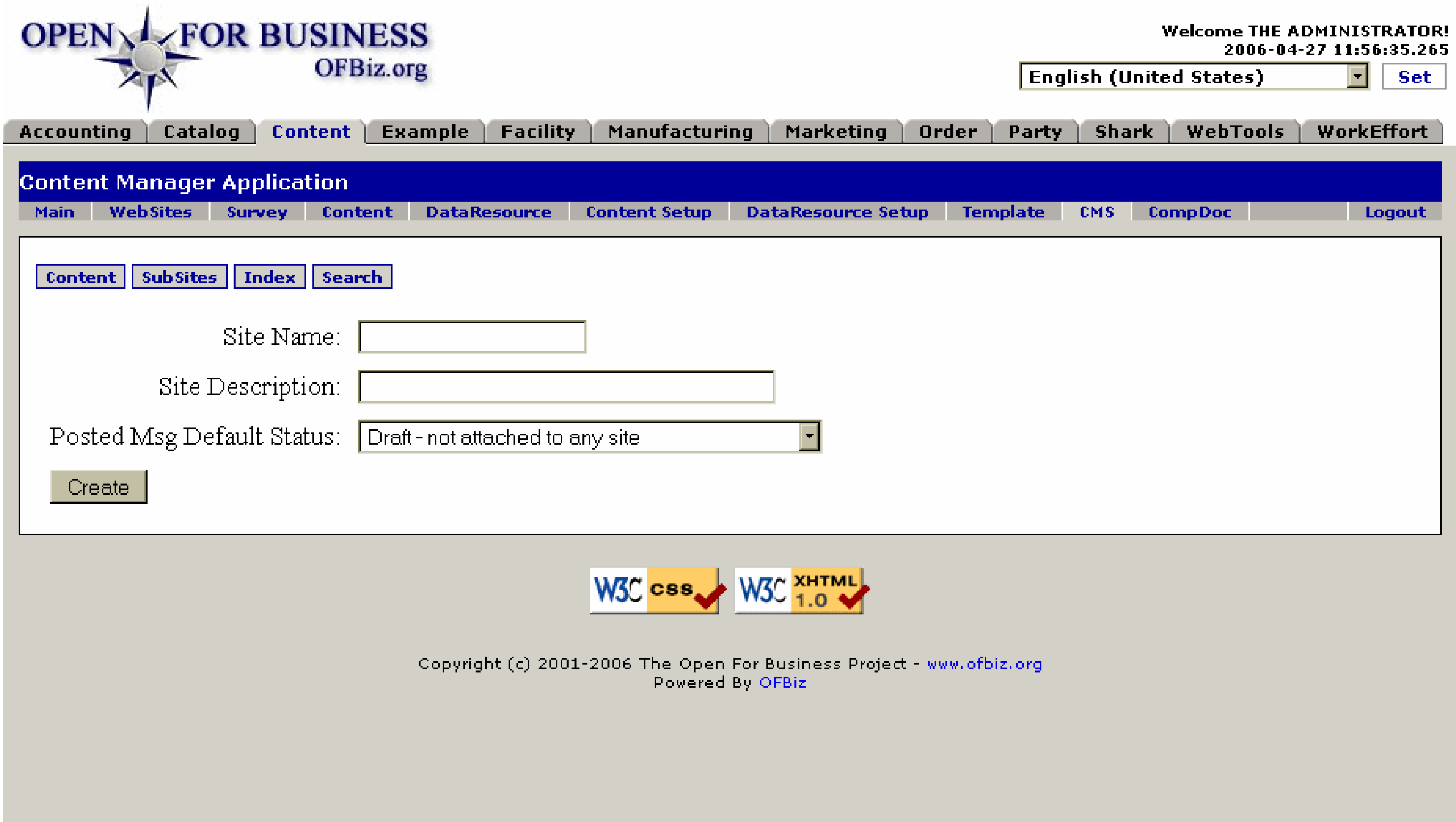
Takes you to a working screen to monitor and regulate the Roles of different Party members.

## .9.2.5 'Add Child Forum' link

Note: the link to [Add Top Level Forum] takes you to the same screen, but thereyou will be creating a Forum at the same level as your current Parent.

The Parent's name is given in the box near the top center of the screen, in the picture this is WebStoreFORUM.

## .9.2.5.1 addSubSite




Create a subordinate WebSite or discussion area.

## .9.2.5.2 link buttons

[Create] [Content] [SubSites] [Index] [Search]

## .9.2.5.3 Site Name

Give the Site a distinctive name in this field.

## .9.2.5.4 Site Description

Give a brief Description of this Site here.

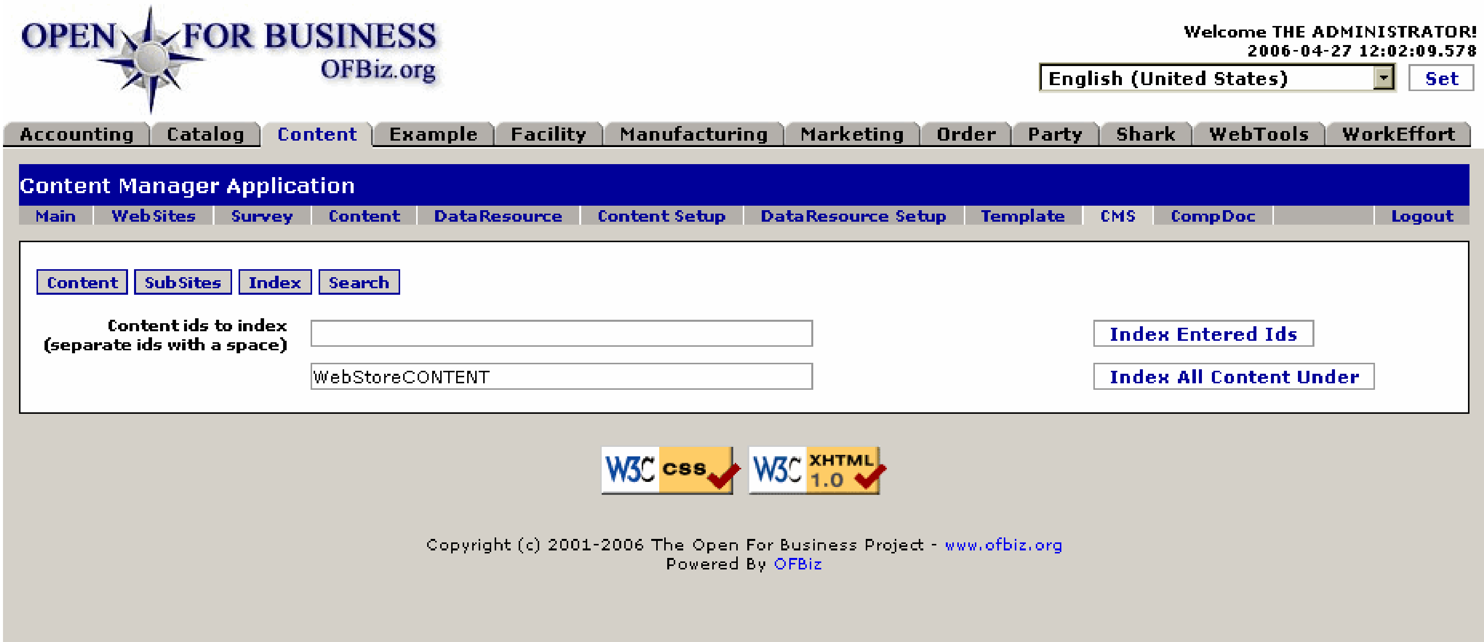
## .9.2.5.5 Posted Msg Default Status (drop-down box)

Drop-down box. Posted status could include:

- Draft - not attached to any site
- Submitted - but must be approved
- Publish immediately

## .9.3 Index by Content ID

### .9.3.1 AdminIndex




After selecting the Content IDs to index, choose the appropriate button to begin the indexing process.

### .9.3.2 link buttons

[Index Entered IDs] [Index All Content Under] [Content] [SubSites] [Index] [Search]

### .9.3.3 How to use the index

First, determine whether you want to index several different Content IDs at the same time or only one.

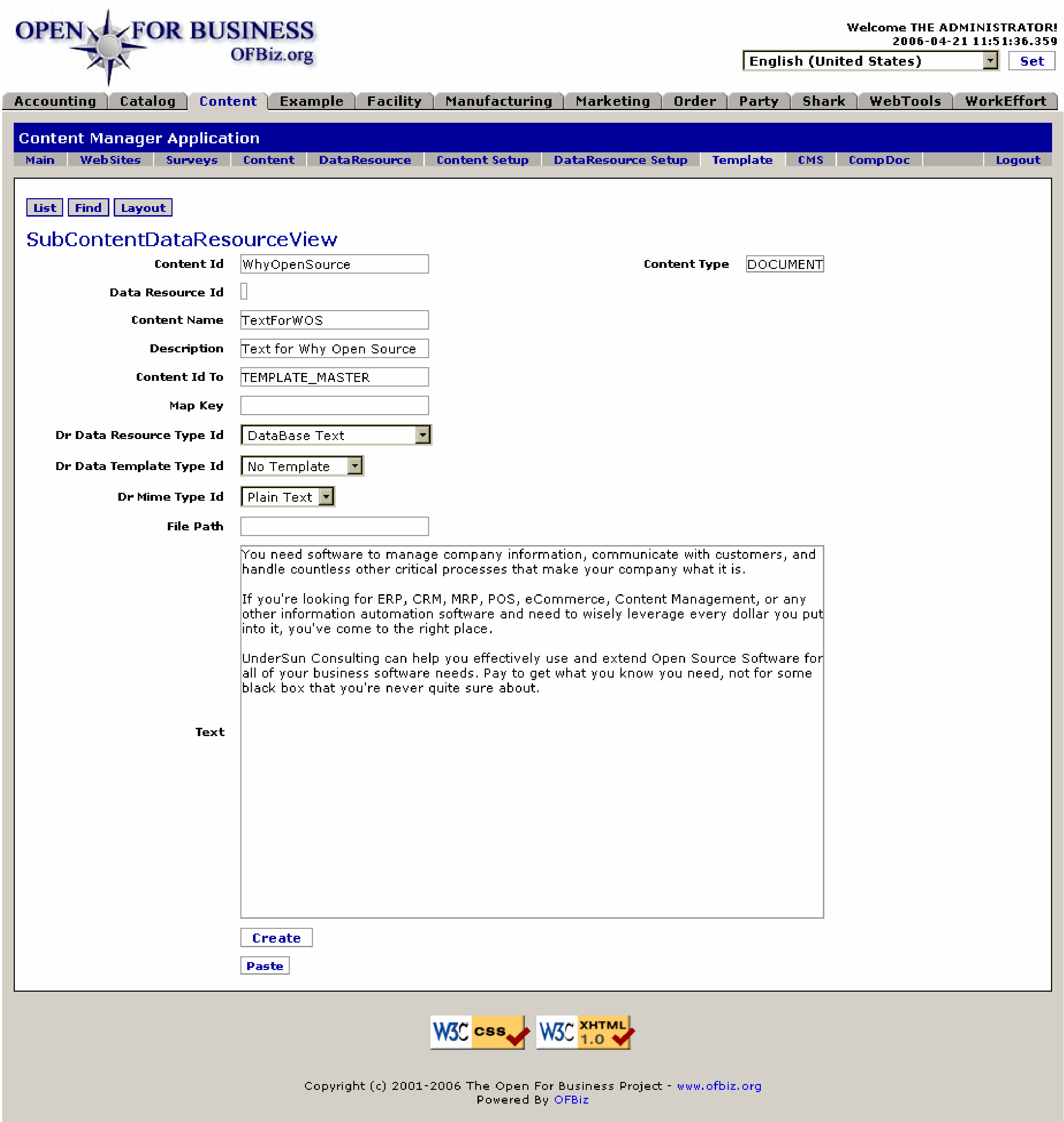
If several, enter the IDs in the top field box, separated by spaces. Then press the [Index Entered Ids] button.

If only one Content ID is being indexed, enter the ID in the lower field box, then press the [Index All Content Under] button.

After indexing is complete, messages will appear in the same screen informing of (1) any processing errors encountered, and (2) how many entities were indexed.

## .9.4 Search / Query

### .9.4.1 AdminSearch




Create new Data Resource SubContent at this screen.

## .9.4.2 link buttons

[Query] [Edit] [Delete] [Content] [SubSites] [Index] [Search]

## .9.4.3 Search tool

### .9.4.3.1 Enter query parameters

These would be Boolean query parameters that you would impose upon the search.

### .9.4.3.2 Select category (drop-down box)

Use the drop-down box to identify which Category of content you wish to bring up.

### .9.4.3.3 Features

This represents other parameters which depend upon your content. In this case, there are radio buttons which indicate whether you wish the query to return from a match of All or of Any from the selected features. The features, in turn, have a drop-down box with an option for - Any - or choices from among the features.

## .9.4.4 Table

### .9.4.4.1 Edit Content

Click on the [Edit] button associated with your selected Content to be taken to the edit screen. Not shown in the empty table above, the left-hand column will have these [Edit] links.

### .9.4.4.2 Content ID

This is the Id assigned to the Content.

### .9.4.4.3 Data Resource Id

If a Data Resource, this is the assigned ID for that DR.

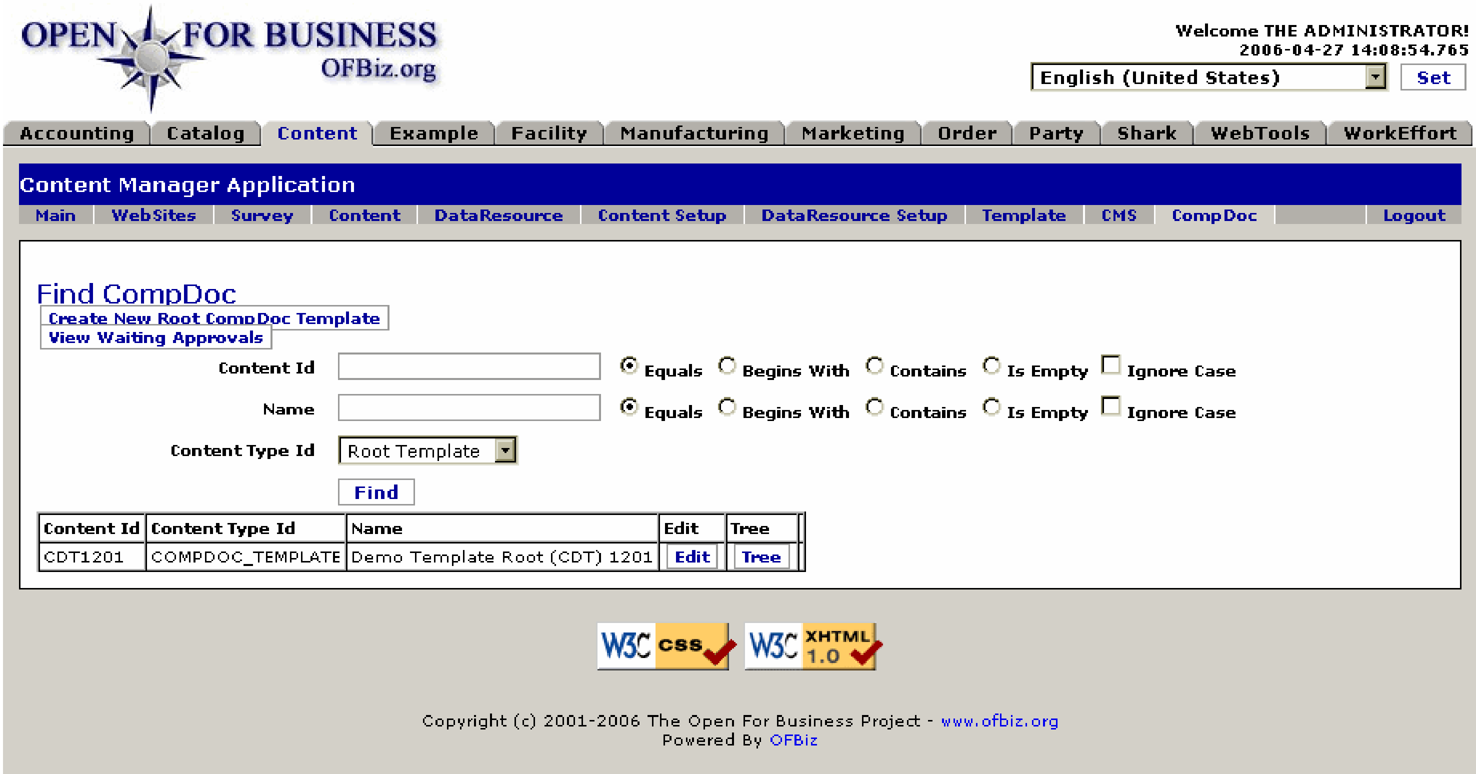
### .9.4.4.4 Name

If there is a Name assigned to the Content or Data Resource, it will be given here.

# .10 CompDoc

## .10.1 Search tool

### .10.1.1 FindCompDoc




Opening screen for the CompDoc tab shows the search tool with an empty table; here we show results on Root Template search.

### .10.1.2 link buttons

[Create New Root CompDoc Template] [View Waiting Approvals] [Find] [Edit] [Tree] [Next] [Previous]

### .10.1.3 Content ID

The assigned identification number for the Content. Enter all or as much as you can and select the appropriate radio button: Equals / Begins With / Contains / Is Empty. If unsure whether UPPER or lower case, check the box for Ignore Case.

### .10.1.4 Name

If the Content has a Name as well as, or instead of, the Content ID. Partial Name is OK; select the appropriate radio button: Equals / Begins With / Contains / Is Empty. If unsure whether UPPER or lower case, check the box for Ignore Case.

### .10.1.5 Content Type ID (drop-down box)

To search on a particular Content Type, or to limit the search to that type, choose from the drop-down box.

## .10.2 Table of found documents

### .10.2.1 Content ID

The identification assigned to this Content.

### .10.2.2 Content Type ID

Which Type of Content is this?

### .10.2.3 Name

The Name of the Content ID, if one was assigned.

### .10.2.4 Edit link column

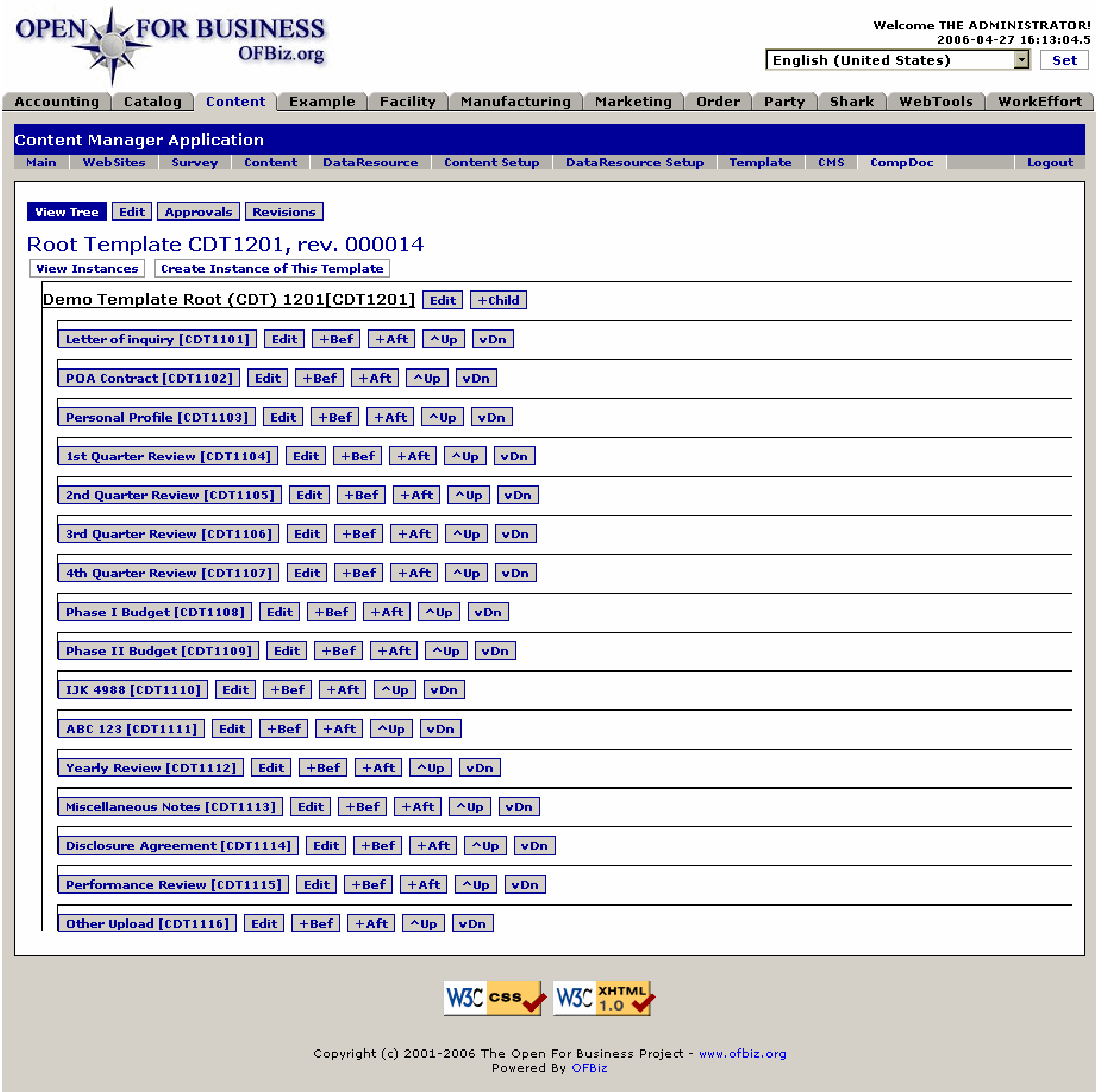
Click on the [Edit] link in the row of the Content you wish to edit.

### .10.2.5 Tree link column

If the Content has either Parent or Child content, the tree will be presented as shown in the screen capture, below.

## .10.3 Content Tree

### .10.3.1 ViewCompDocTemplateTree




Every Child subordinate to the selected item is listed with links as shown.

### .10.3.2 link buttons

[Edit] [+Child] [Edit] [+Bef] [+Aft] [^Up] [vDn] [View Instances] [Create Instance of This Template] [View Tree] [Edit] [Approvals] [Revisions]

### .10.3.3 Discussion

This is a very busy, complex screen. We will not demonstrate each of the links; experiment with them yourself to learn what they do. There is enough seed data with OFBiz to make this possible.

Up arrow [^Up] and down arrow [vDn] will relocate the associated Content respectively up or down the tree one position for each 'click.'

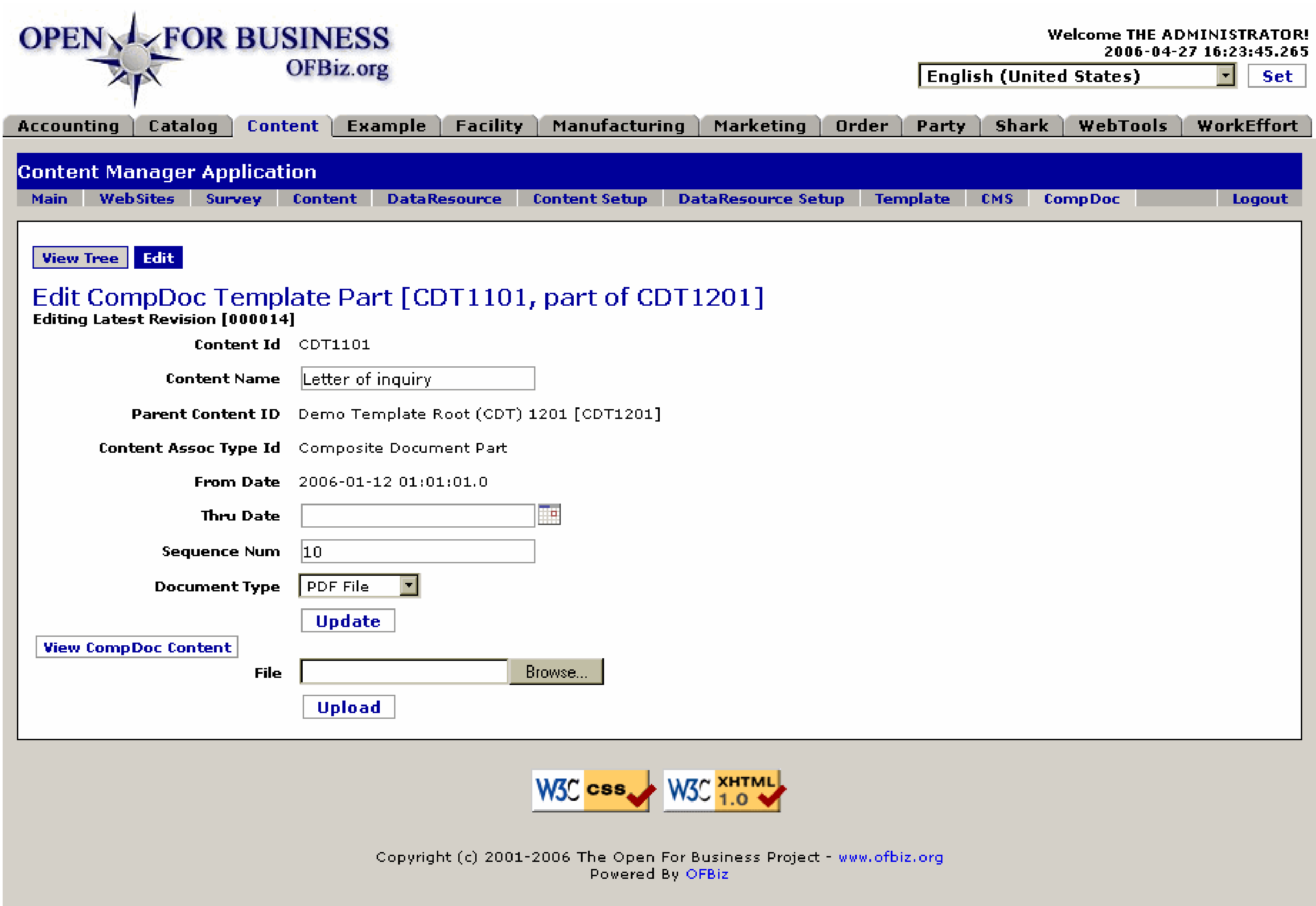
[+Bef] and [+Aft] will open an 'Add' screen for you to create new instances of content respectively Before or After the associated Content.

## .10.4 Edit Content

### .10.4.1 Edit Content

You will not be editing the text or core of the Content, rather you will be dealing with the infrastructure items, as shown below.

## .10.4.2 EditChildCompDoc




Edit the Child documents at this screen after clicking on the Name/ContentID link.

## .10.4.3 link buttons

[Update] [Browse] [Upload] [View CompDoc Content] [View Tree] [Edit]

## .10.4.4 Editing Latest Revision

States the number of the Revision you are working on here. Cannot be changed.

## .10.4.5 Content ID

The ID of the specific Content which you are editing here. Cannot be changed from this screen.

### .10.4.6 Content Name

You may edit the Name of the Content in this field.

### .10.4.7 Parent Content ID

The Parent of this content. Cannot be edited or changed in this screen.

### .10.4.8 Content Assoc Type Id

The originally assigned Content Association Type; cannot be changed or edited from this screen.

### .10.4.9 From Date

When the Content was created or made effective. Cannot be changed or edited at this screen.

### .10.4.10 Thru Date (popup calendar)

If the Content needs to expire at some point, use the popup calendar to specify (or change) that date.

### .10.4.11 Sequence Num

If a sequencing system is in place, indicate the Sequence for this Content in this field.

### .10.4.12 Document Type (drop-down box)

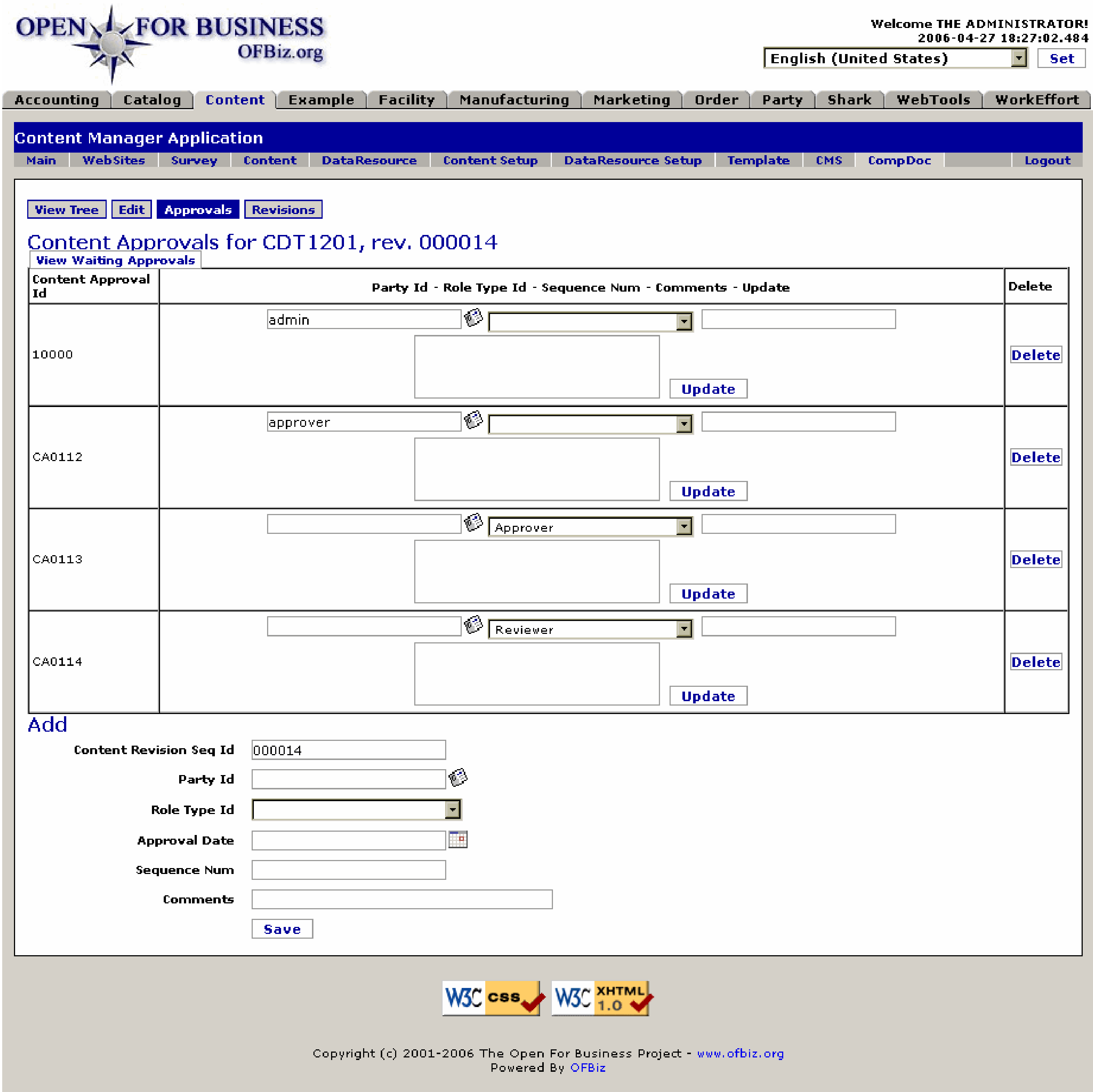
Select the Type of document from the drop-down box if you wish to change this element here.

### .10.4.13 File (browse button)

Use the Browse button to locate the file for upload, if desired.

## .10.5 Approvals tab

### .10.5.1 ListContentApproval




From this screen you can enter and monitor the Approvals for each of the Content items.

## .10.5.2 link buttons

[View Waiting Approvals] [Update] [Save] [Delete] [View Tree] [Edit] [Approvals] [Revisions]

## .10.5.3 Table of Content Approvals

### .10.5.3.1 Content Approval Id

Assigned when the Content Approval was created; cannot be changed or edited.

### .10.5.3.2 Party ID (popup search tool)

This is the Party responsible for this particular Content Approval. It can be changed here as needed; you may use the popup search tool to identify another Party Id.

### .10.5.3.3 Role Type ID (drop-down box)

Select the appropriate Role Type for the Party responsible for approving this Content.

### .10.5.3.4 Sequence Num

Enter the number which specifies the Sequence for this Content.

### .10.5.3.5 Comments

The Approving Party can enter any comments to reflect his decision before clicking the [Update] link.

### .10.5.3.6 Delete button

When approriate, click the [Delete] link to delete the Content item.

## .10.5.4 Tool to Add Content Approvals

### .10.5.4.1 Content Revision Seq Id

What Revision level is this Content on?

### .10.5.4.2 Party ID (popup search tool)

Use the search tool to identify the responsible Party.

### .10.5.4.3 Role Type ID (drop-down box)

Specify the Role Type from the drop-down box.

### .10.5.4.4 Approval Date (popup calendar)

Use the calendar to enter the Date (and Time) of Approval.

### .10.5.4.5 Sequence Num

State the Sequence Number for this Content.

### .10.5.4.6 Comments

Enter any comments you wish here.

## .10.6 Revisions tab

### .10.6.1 ListContentRevisions


As the Content proceeds thru Revisions, this List of Revision Sequences is maintained.

### .10.6.2 link buttons

[Edit] [Items] [Create] [Tree] [View Tree] [Edit] [Approvals] [Revisions]

### .10.6.3 Table of Content Revisions

#### .10.6.3.1 Content Id

The identity assigned to the Content. Notice how all the items in the table have the same Content.

#### .10.6.3.2 Content Revision Seq Id

Each Revision carries its own Id, showing when it was performed in the sequence of revisions.

### .10.6.3.3 Committed By Party ID

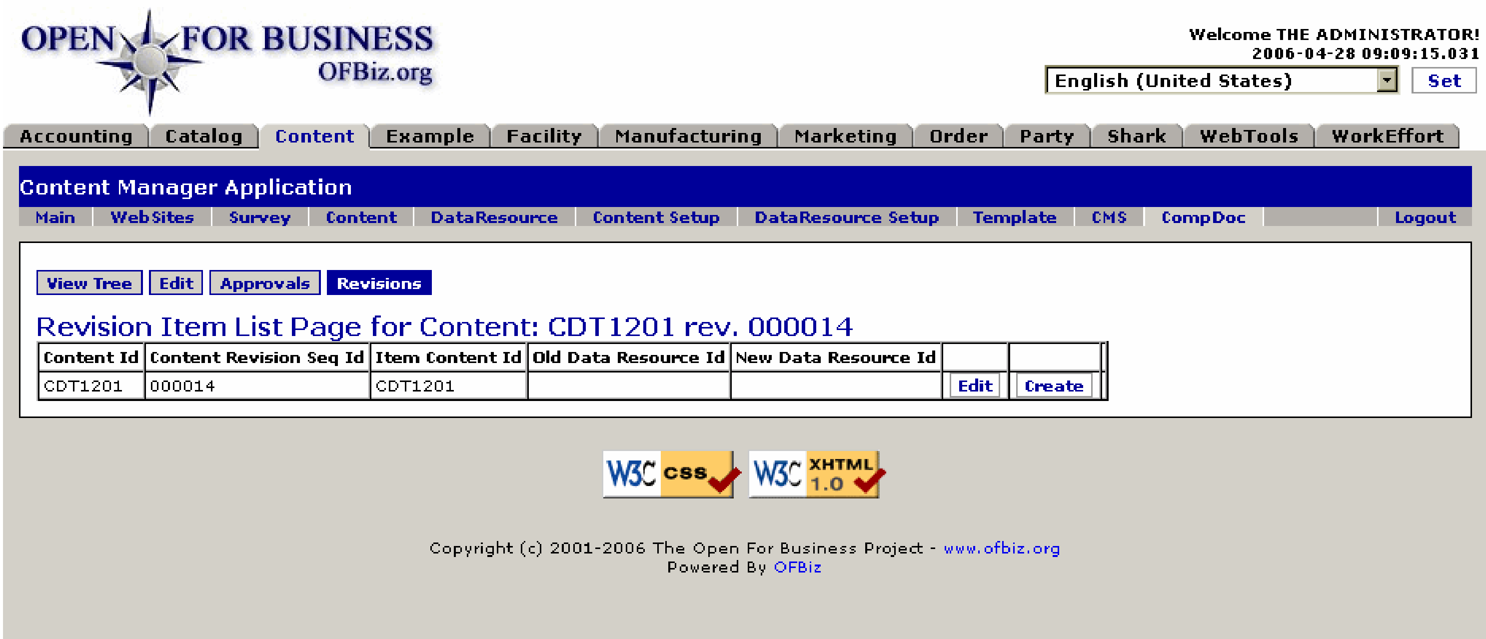
When the Revision is committed by sign-off, the Party giving final approval will be indicated here.

### .10.6.3.4 Comments

Comments on the Revision are included in this cell.

### .10.6.3.5 Edit Revision

#### .10.6.3.5.1 EditContentRevision




When the [Items] link is clicked, this screen appears.

#### .10.6.3.5.2 link buttons

[Save] [View Tree] [Edit] [Approvals] [Revisions]

#### .10.6.3.5.3 Content ID (popup search tool)

Populated with the Content ID selected to Edit from the Table of Revisions. You may use the popup search tool

to change to another Content, if you wish.

### .10.6.3.5.4 Content Revision Seq Id

As a Content goes through iterations or revisions, each Revision is assigned a Sequence ID. This number is given here.

### .10.6.3.5.5 Committed By Party ID

The Party making the changes with this Revision is stated here.

### .10.6.3.5.6 Comments

Any remarks that should accompany this Revision can be entered here.

## .10.6.3.6 Items link

### .10.6.3.6.1 ListContentRevisionItem


When the [Items] link is clicked, this screen appears.

### .10.6.3.6.2 link buttons

[Edit] [Create] [View Tree] [Edit] [Approvals] [Revisions]

### .10.6.3.6.3 Discussion of the Table

Revision Item List Page presents a table with columns for each of the following headings:

Content Id gives the ID of the selected Content.

Content Revision Seq Id shows the Revision for this Content.

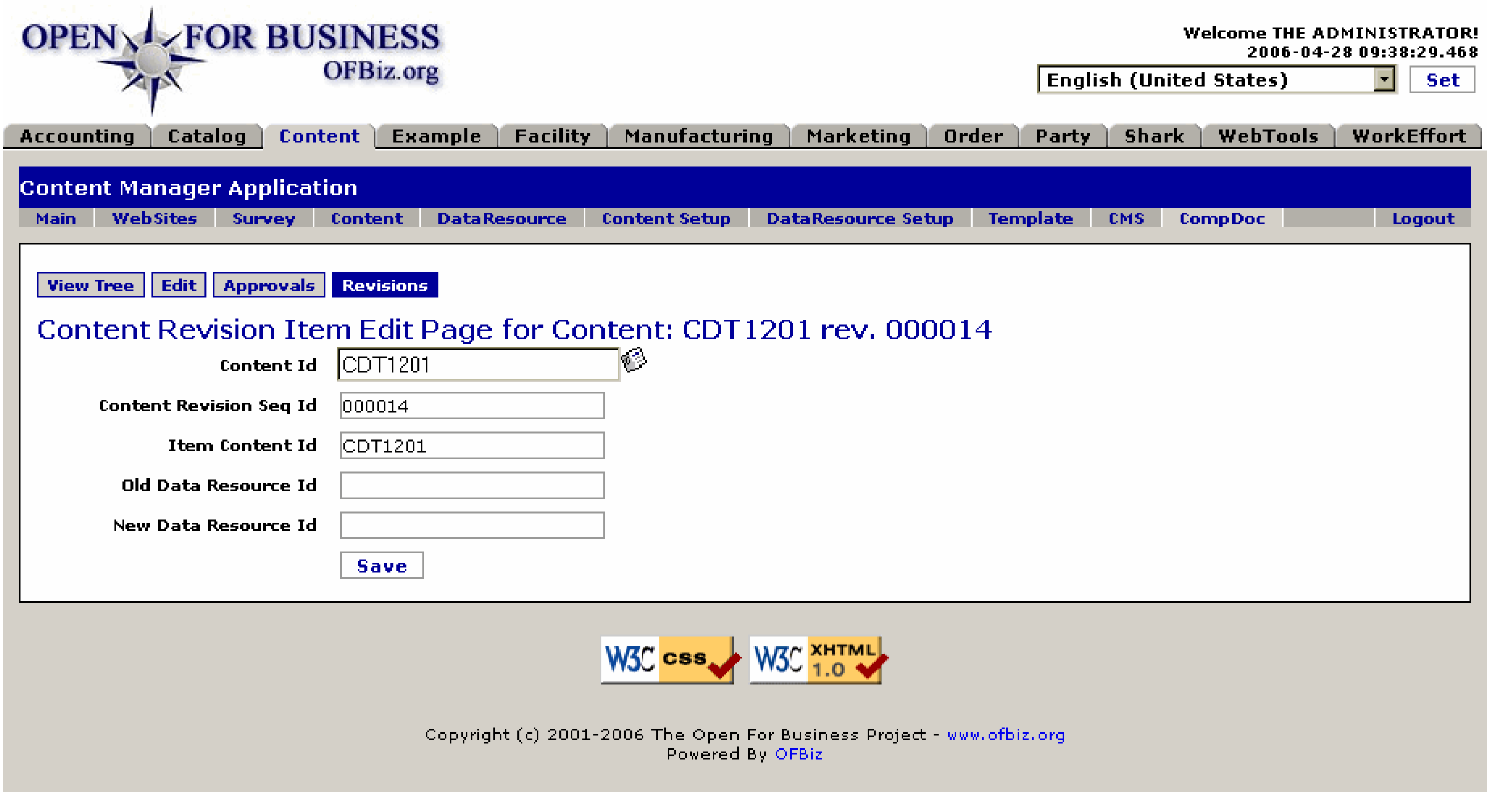
Item Content Id is the Item's identification.

Old Data Resource Id would be any earlier ID of a Data Resource.

New Data Resource Id names the updated ID for the DR.

## .10.6.3.6.4 Edit Revision Item

### .10.6.3.6.4.1 EditContentRevisionItem




Edit the Revision Item at this screen.

### .10.6.3.6.4.2 link buttons

[Save] [View Tree] [Edit] [Approvals] [Revisions]

### .10.6.3.6.4.3 Discussion of the Table

Content Revision Item Edit Page presents an update tool with the Revision Items populated and changes possible under the same headings as found in the Table, above. Click on [Save] to update with any changes.

# .11 OFBiz Content Management How to

Thanks Jacopo Cappellato for the original document creation on OFBiz CMS, contents in this document are referred from it.


- Basic Concepts: DataResource and Content records
  - Data Resource
    - Data Resource of type SHORT_TEXT
    - Data Resource of type ELECTRONIC_TEXT
    - Embedding FTL markup in the text
  - Content
    - The Sub-Content Pattern
    - Content and decorator templates
  - Using the <content/> element in a screen definition.
- How to setup a content driven website: WebSites, publish points and default pages
  - Initial setup
    - web.xml file
    - controller.xml file
  - Defining the web site publish points
  - Adding a new page
  - Defining the default page
  - URI format to access Content information
    - <BASE URL>/<CMS>/<CONTENT ID OF THE SCREEN>


## .11.1 Basic Concepts: DataResource and Content records

Let's suppose that we want to define content (that we will include in a screen) for the text "This is the text that will appear on screen.".

### .11.1.1 Data Resource

First of all we have to define a DataResource representing this text. The most common options we have are the following: SHORT_TEXT, ELECTRONIC_TEXT, URL_RESOURCE.

#### .11.1.1.1 Data Resource of type SHORT_TEXT

```
<DataResource dataResourceId="DS_01" dataResourceTypeId="SHORT_TEXT" objectInfo="This is the text that will appear on screen."/>
```

This is the simplest version and is useful when you have to store short texts.

### .11.1.1.2 Data Resource of type ELECTRONIC_TEXT

```
<DataResource dataResourceId="DS_01" dataResourceTypeId="ELECTRONIC_TEXT"/>
<ElectronicText dataResourceId="DS_01">
    <textData><![CDATA[
        This is the text that will appear on screen.
    ]]></textData>
</ElectronicText>
```

This is similar to the SHORT_TEXT version, but gives you greater flexibility because you can store long texts in the textData field.

### .11.1.1.3 Embedding FTL markup in the text

The tree above DataResource records works well when the content is a simple text or a markup language (html, xml etc...) that just needs to be rendered as is. If you want to embed FTL markup (directives etc...) that needs to be processed before the rendering you can achieve this using the dataTemplateTypeId attribute:

```
<DataResource dataResourceId="DS_01" dataResourceTypeId="ELECTRONIC_TEXT"
dataTemplateTypeId="FTL"/>
```

in this way all the Freemarker instructions in the text will be executed before rendering the screen.

## .11.1.2 Content

Now we have to create a Content record that is associated to the DataResource. No matter what type of data resource you have choosen, the Content record is the same:

```
<Content contentId="CN_01" contentTypeId="DOCUMENT" contentName="Content 01"
dataResourceId="DS_01"/>
```

Note that the contentTypeId is "DOCUMENT": all pages and sections of pages should be this type.

### .11.1.2.1 The Sub-Content Pattern

This is a pattern used find and render sub-content of a Content record by specifying two things:
contentId - the parent contentId to find sub-content of
mapKey - the value of the mapKey field in the ContentAssoc between the parent- and sub-content

to look up by
The ContentAssoc.contentTypeId should be SUB_CONTENT.
There can be multiple ContentAssoc records between the parent- and sub-content because of the fromDate field that is part of the primary key. To find the one we want we follow the standard pattern of sorting by -fromDate (newest first) and make sure the current date is greater than the fromDate and that either the thruDate is null or the current date is less than or equal to the thruDate.
We will see the Sub-Content Pattern in action below in two scenarios:
to decorate the various sections of a screen DECORATOR template (see section "Content and decorator templates")
to provide a clean way to reference content in URL for web content sites (see section "Defining the publish point")

### .11.1.2.2 Content and decorator templates

If you want to embed the content of a DataResource in an existing template (to decorate/fill a region of it) you can use the decoratorContentId attribute:

```
<Content contentId="CN_01" contentTypeId="DOCUMENT" contentName="Content 01"
dataResourceId="DS_01" decoratorContentId="CN_DEC"/>
```

where "CN_DEC" is the contentId of a Content record that looks like:

```
<DataResource dataResourceId="DS_DEC" dataResourceTypeId="ELECTRONIC_TEXT"
dataTemplateTypeId="FTL"/>

<ElectronicText dataResourceId="DS_DEC">

    <textData><![CDATA[

        <!DOCTYPE html PUBLIC "-//W3C//DTD XHTML 1.0 Transitional//EN"
"http://www.w3.org/TR/xhtml1/DTD/xhtml1-transitional.dtd">

        <html xmlns="http://www.w3.org/1999/xhtml">

          <head>

            Main Decorator

          </head>

          <body>

            ${decoratedContent}

          </body>

        </html>

    ]]></textData>

</ElectronicText>
```

```
<Content contentId="CN_DEC" contentTypeId="DECORATOR" contentName="Decorator"
dataResourceId="DS_DEC"/>
```

When using this decorator, the DataResource text defined by DS_01 will be inserted in place of the ${decoratedContent} variable.

You can also define more placeholders/regions in the decorator template:

```
<DataResource dataResourceId="DS_DEC" dataResourceTypeId="ELECTRONIC_TEXT"
dataTemplateTypeId="FTL"/>

<ElectronicText dataResourceId="DS_DEC">

    <textData><![CDATA[

        <!DOCTYPE html PUBLIC "-//W3C//DTD XHTML 1.0 Transitional//EN"
"http://www.w3.org/TR/xhtml1/DTD/xhtml1-transitional.dtd">

        <html xmlns="http://www.w3.org/1999/xhtml">

          <head>

            Main Decorator

          </head>

          <body>

            ${(thisContent.subcontent.header)?if_exists}

            <hr/>

            ${decoratedContent}

          </body>

        </html>

    ]]></textData>

</ElectronicText>

<Content contentId="CN_DEC" contentTypeId="DECORATOR" contentName="Decorator"
dataResourceId="DS_DEC"/>


<DataResource dataResourceId="DS_DEC_HEADER" dataResourceTypeId="SHORT_TEXT"
objectInfo="This is the text for the decorator header."/>

<Content contentId="CN_DEC_HEADER" contentTypeId="DOCUMENT" contentName="Decorator Header"
dataResourceId="DS_DEC_HEADER"/>

<ContentAssoc contentId="CN_DEC" contentIdTo="CN_DEC_HEADER"
contentAssocTypeId="SUB_CONTENT" mapKey="header" fromDate="2001-01-01 00:00:00"/>
```

In this decorator we have placed a new placeholder for the header section, using a variable named "header" that is referenced using the syntax

${(thisContent.subcontent.header)?if_exists}

Then we have defined a new DataResource/Content pair to set the content for the header ("This is the text for the decorator header."). The association is done using the ContentAssoc entity (see the last line in the code block): the mapKey attribute is where you set the name of the variable used in the decorator template. Here are a few hints to consider when you are preparing the content for a decorator template:
you can always get a reference to the Content for the Decorator (and associated resources) using following variable

${thisContent}

you can always get a reference to the Content for the decorated (current) screen (and associated resources) using following variable

${decoratedContent}

both ${thisContent} and ${decoratedContent} are references to objects of type ContentMapFacade: this is a special class that implements the Map interface and can be used to quickly get Content related resources

;
for example:

${decoratedContent.subcontent.sub1}:

above code renders the content record associated to the main one with the mapKey "sub1"
when you define a hook for a region, it is usually a good idea to use a syntax like this:

${(decoratedContent.subcontent.footer)?default((thisContent.subcontent.footer)?if_exists
)}

In this way, when the decorated screen is rendered, if a "footer" record is associated to the decorated screen, then it is used that footer before defaulting to the default one (if available) associated to the decorator Content

## .11.1.3 Using the <content/> element in a screen definition.

You can easily include the content directly inside the <widgets> section of the screen definition with the following directive:

<content content-id="CNT_EXAMPLE"/>

## .11.2 How to setup a content driven website: WebSites, publish points and default pages

Here are some tips to quickly setup a website whose content can be managed using the OFBiz built-in features of the Content management framework.

### .11.2.1 Initial setup

#### .11.2.1.1 web.xml file

Make sure that, in the web.xml file you have an entry to set in the session the webSiteId of your site:

```
<context-param>
    <param-name>webSiteId</param-name>
    <param-value>CmsExampleSite</param-value>
    <description>A unique ID used to look up the WebSite entity to get information about content, catalogs, etc.</description>
</context-param>
```

#### .11.2.1.2 controller.xml file

Add to the controller.xml file the following (or similar) entries:

```
<default-request request-uri="cms"/>
<request-map uri="main">
    <security https="false" auth="false"/>
    <response name="success" type="request" value="cms"/>
</request-map>
<request-map uri="cms">
    <security https="false" auth="false"/>
    <event type="java" path="org.ofbiz.content.cms.CmsEvents" invoke="cms"/>
    <response name="success" type="none"/>
    <response name="error" type="view" value="error"/>
```

</request-map>

With the above setup, by default all the incoming requests will be dispatched to the CmsEvents event; this event will use the data in the Content data model to generate the content of the page and will return it back to the browser. In this way it will be possible to add new pages just editing the data in the Content data model and without editing the controller.xml file.

### .11.2.2 Defining the web site publish points

Next step is to define at least one publish point for the web site.  A Web Site Publish Point is a special Content record that is not associated to a DataResource and its contentTypeId is WEB_SITE_PUB_PT: this is a Placeholder ContentType that is not meant to be rendered, but rather used to organize other content associated with it.  The Web Site Publish Point Content entry is associated to the WebSite thru the WebSiteContent entity, using a webSiteContentTypeId equal to "PUBLISH_POINT".
Here is an example of this data setup:

```
<Content contentId="CMSS_PPOINT" contentTypeId="WEB_SITE_PUB_PT" contentName="CMS Site Publish Point" description=""/>

<WebSiteContent webSiteId="CmsExampleSite" contentId="CMSS_PPOINT" webSiteContentTypeId="PUBLISH_POINT" fromDate="2010-01-01 00:00:00"/>
```

### .11.2.3 Adding a new page

Defining a new content driven page is as simple as defining a new Content/DataResource pair (as described in the above sections) of type DOCUMENT and then associating it to one of the web site publish points; the association, done thru the ContentAssoc entity (of type SUB_CONTENT) can be direct or indirect (i.e. the content record is a child of one of descendants of the publish point). For some examples of this setup see the section "URI formats to access Content information" below.

### .11.2.4 Defining the default page

This is an optional step.  You can define a default content driven page for the web site, that is used when no page (content) is specified in the URI. The Content/DataResource pair for the page is the same of a standard page (the content page needs also to be associated, directly or indirectly, to a publish point) and the association to the WebSite as the default page is done with an entry like the following one:

```
<WebSiteContent webSiteId="CmsExampleSite" contentId="EXAMPLE_CONTENT" webSiteContentTypeId="DEFAULT_PAGE" fromDate="2001-01-01 00:00:00"/>
```

The page defined by the EXAMPLE_CONTENT content will be used as the default page for the web site.

### .11.2.5 URI format to access Content information

According to the way the CMS site has been setup, you will be able to use the following URI format to visit the Content managed screens. In the following examples we will adopt these values:
<BASE URL>: This is the base url of the application; we will assume "https://localhost:8443/cmssite"
<CMS>: This is the entry point for all the CMS managed content (as defined in the controller.xml file); we will assume "cms"
<CONTENT ID OF THE SCREEN>: This is the contentId of a content record of type DOCUMENT that is associated to a DataResource containing the information to be rendered to the browser; we will assume the value EXAMPLE_CONTENT

#### .11.2.5.1 <BASE URL>/<CMS>/<CONTENT ID OF THE SCREEN>

Example:https://localhost:8443/cmssite/cms/EXAMPLE_CONTENT
This will only work if the Content record with id EXAMPLE_CONTENT is a node of a tree having a web site publish point as its root. The EXAMPLE_CONTENT content can be directly associated to the publish point:

```
<ContentAssoc contentId="CMSS_PPOINT" contentIdTo="EXAMPLE_CONTENT"
contentAssocTypeId="SUB_CONTENT" fromDate="2010-01-01 00:00:00"/>
```

or indirectly associated to it:

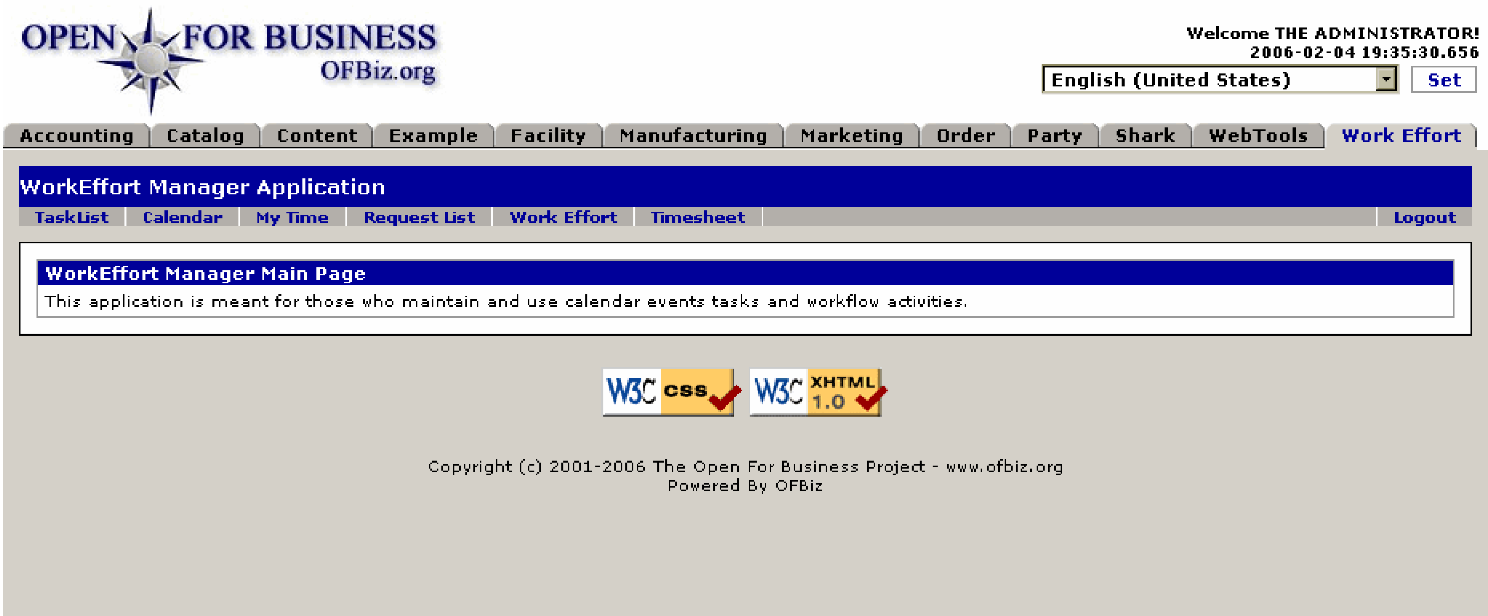
```
<ContentAssoc contentId="CMSS_PPOINT" contentIdTo="ANOTHER_CONTENT"
contentAssocTypeId="SUB_CONTENT" fromDate="2010-01-01 00:00:00"/>
```

```
<ContentAssoc contentId="ANOTHER_CONTENT" contentIdTo="EXAMPLE_CONTENT"
contentAssocTypeId="SUB_CONTENT" fromDate="2010-01-01 00:00:00"/>
```

# Chapter 11: WorkEffort Manager

## .1 TaskList

### .1.1 main




The Main Page in the Work Effort Manager quickly defers to the TaskList.

### .1.2 Discussion

The Main screen above is usually displaced by the my tasks screen shown below. Current tasks listed are for the one who has logged into the application.

## .1.3 mytasks


All current Tasks for the logged-in Party are displayed here at "My Current TaskList." Click the TaskName or number to edit.

## .1.4 link buttons

[New Task] [Accept Assignment ... ]

## .1.5 Assigned Tasks

Tasks assigned to you by others will appear here on your list. You might have the option to delegate the task to others or to decline the task; use the Edit Task button to bring up that screen. Space is provided to annotate reasons for actions or to leave notes for yourself as work progresses.

### .1.5.1 Start Date/Time

When the Task is scheduled to begin.

### .1.5.2 Priority

Assigned priority from 9 (low) to 1 (highest).

### .1.5.3 Status

Either click on this Task Name or the ID number in the Edit column to be taken to the Work Effort tab > Summary screen.

### .1.5.4 TaskName

Either click on this Task Name or the ID number to be taken to the Work Effort tab > Summary screen.

### .1.5.5 Edit >> Task Detail

Either click on this ID number or the Task Name to be taken to the Work Effort tab > Summary screen.

## .1.6 Workflow activities assigned to user

### .1.6.1 Start Date / Time

If given, when the work began or is scheduled to begin.

### .1.6.2 Priority

What Priority or level of importance has been assigned to this Activity.

### .1.6.3 Activity Status

The status of the Workflow Activity as far as the system is concerned.

### .1.6.4 Status

Your status in working through the Activity from your perspective.

### .1.6.5 Role ID

What is your assigne Role in this Activity.

### .1.6.6 Activity Name

The name of the Activity which includes the current assignment.

### .1.6.7 Edit

Under the 'Workflow activities assigned to user' section, click on this to view or edit the Assignment; takes you to the Work Effort tab.

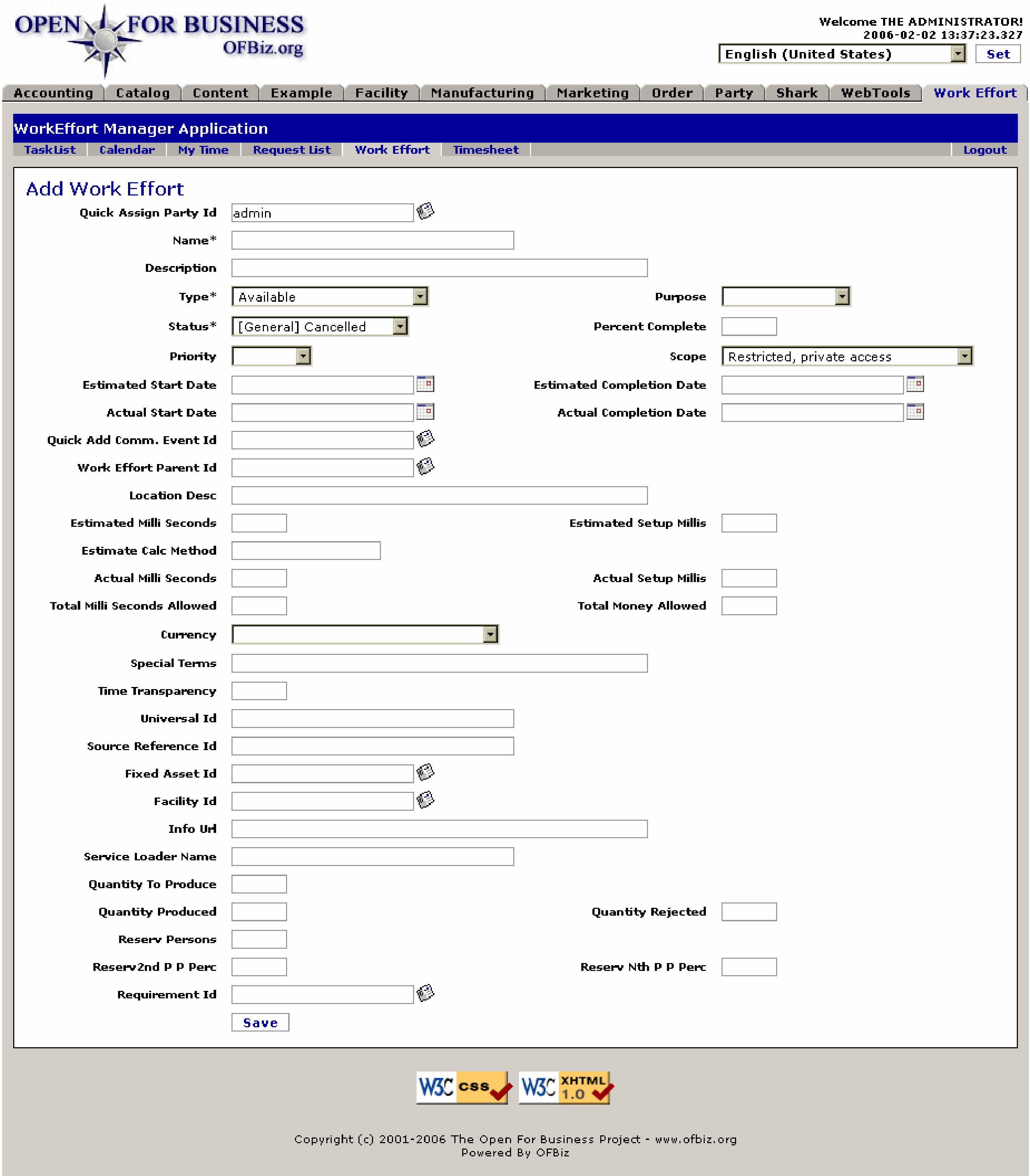
Under the 'Workflow activities assigned to User Role' section, click on this to accept the assignment.

## .1.7 Workflow activities assigned to User Role

The column headings are the same as under 'Workflow activities assigned to user', above. The difference is between the User and the Role.

## .1.8 Task Detail - New Task

### .1.8.1 EditWorkEffort-newTask



OPEN FOR BUSINESS OFBiz.org

Welcome THE ADMINISTRATOR!
2006-02-02 13:37:23.327

English (United States) | Set

Accounting | Catalog | Content | Example | Facility | Manufacturing | Marketing | Order | Party | Shark | WebTools | Work Effort

WorkEffort Manager Application

TaskList | Calendar | My Time | Request List | Work Effort | Timesheet | Logout

## Add Work Effort

| | | | |
|---|---|---|---|
| Quick Assign Party Id | admin | | |
| Name* | | | |
| Description | | | |
| Type* | Available | Purpose | |
| Status* | [General] Cancelled | Percent Complete | |
| Priority | | Scope | Restricted, private access |
| Estimated Start Date | | Estimated Completion Date | |
| Actual Start Date | | Actual Completion Date | |
| Quick Add Comm. Event Id | | | |
| Work Effort Parent Id | | | |
| Location Desc | | | |
| Estimated Milli Seconds | | Estimated Setup Millis | |
| Estimate Calc Method | | | |
| Actual Milli Seconds | | Actual Setup Millis | |
| Total Milli Seconds Allowed | | Total Money Allowed | |
| Currency | | | |
| Special Terms | | | |
| Time Transparency | | | |
| Universal Id | | | |
| Source Reference Id | | | |
| Fixed Asset Id | | | |
| Facility Id | | | |
| Info Url | | | |
| Service Loader Name | | | |
| Quantity To Produce | | | |
| Quantity Produced | | Quantity Rejected | |
| Reserv Persons | | | |
| Reserv2nd P P Perc | | Reserv Nth P P Perc | |
| Requirement Id | | | |

Save

W3C css | W3C XHTML 1.0



New Tasks are created in a screen identical to the Edit Task screen. This is a generic screen, found under the Work Effort tab.

### .1.8.2 link buttons

[Save]

### .1.8.3 Discussion

Each of the fields is discussed below under the Work Effort tab.

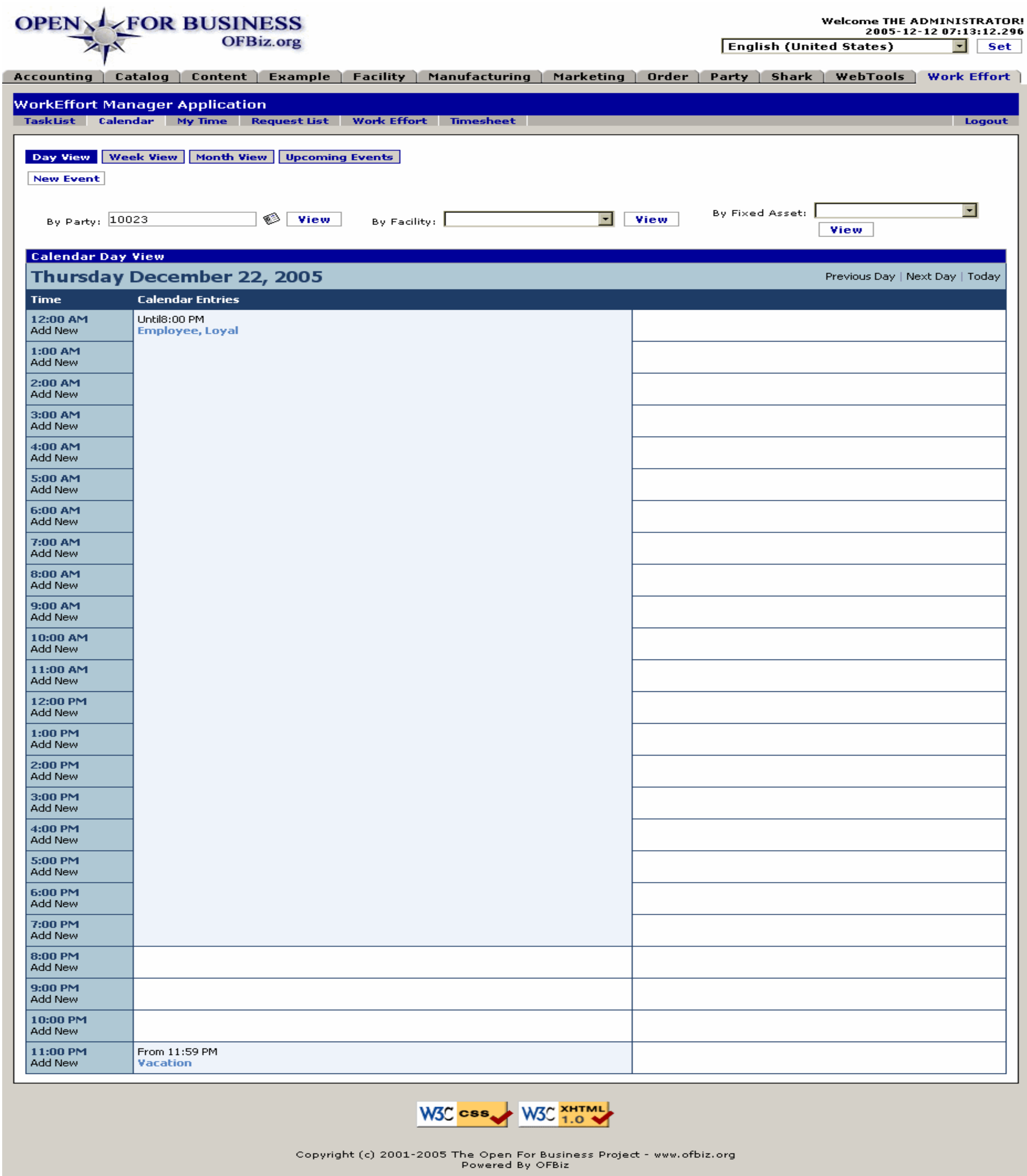
# .2 Calendar

## .2.1 Discussion

Click upon highlighted events within any calendar to be taken to the Calendar Event Details edit screen.

Use the selection tools By Party, By Facility and By Fixed Asset to change to a calendar associated with the Party, Facility or Fixed Asset you wish to see. Subsequent 'View' changes will remain with the same Party, Facility or Asset you have then selected.

## .2.2 day




View of the Day when Mr. Loyal Employee will be leaving for vacation. Work Event to 8:00pm; Vacation Event from midnight.

## .2.3 link buttons

[New Event] [View] [Add New] [Previous Day] [Next Day] [Today] [Day View] [Week View] [Month View] [Upcoming Events]

## .2.4 Day view

### .2.4.1 Time

Expressed in hourly blocks for the entire day, every hour from midnight through 11:00pm. Click on the [Add New] link within each hour segment to add an event to that period.

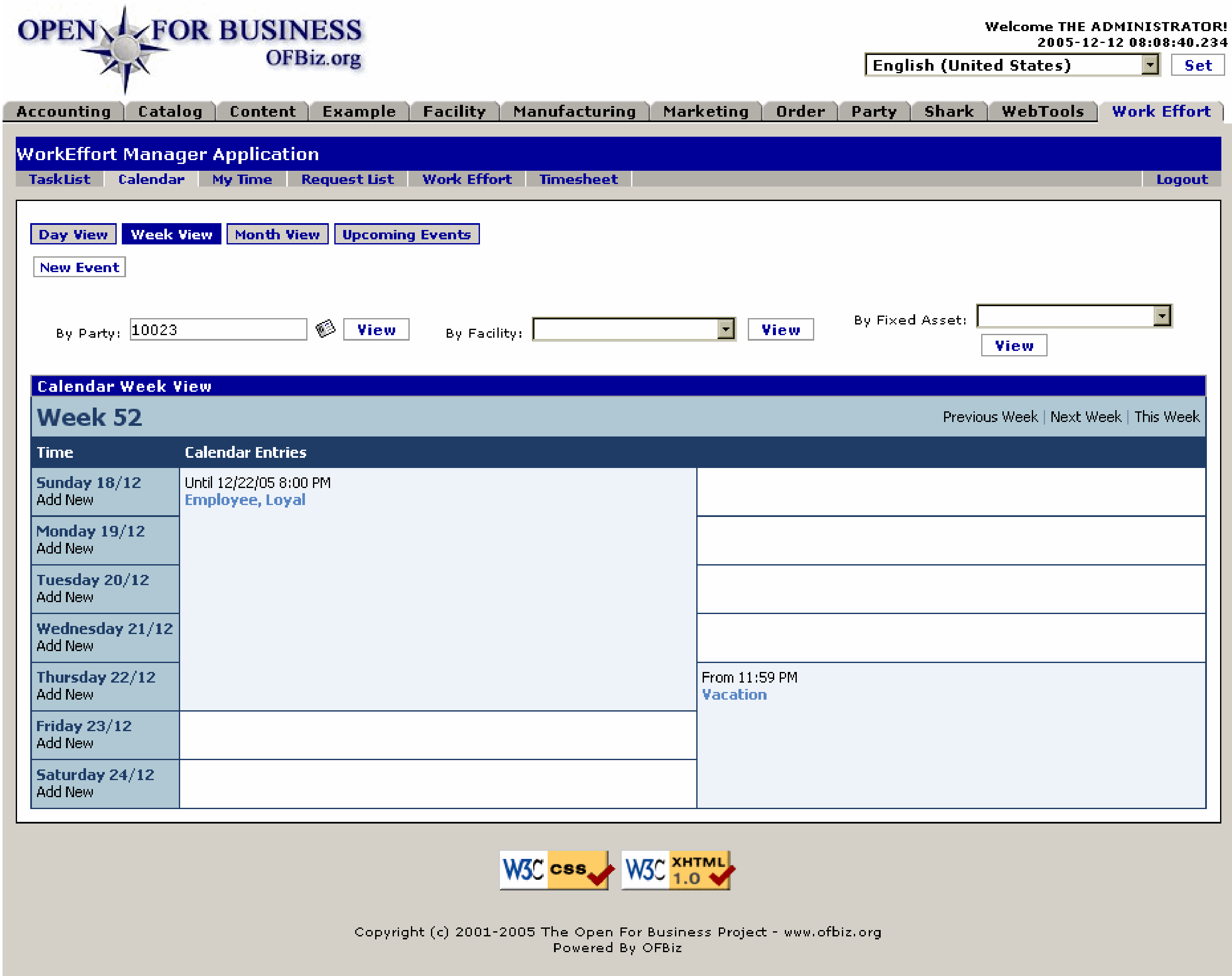
### .2.4.2 Calendar Entries

In the left-hand calendar entries column appears the scheduled start time and the name of the entry. Click on the name to see details or to edit the entry.

The right-hand column fills out when there are two or more entries for the same time period. Three or more columns may appear as needed.

## .2.5 Week view

### .2.5.1 week




View of the calendar Week for an individual.

### .2.5.2 link buttons

[Add New] [Previous Week] [Next Week] [This Week] [New Event] [View] [Day View] [Week View] [Month View] [Upcoming Events]

### .2.5.3 Time

One block is given for each of the seven days. Click on the [Add New] link within each hour segment to add an event to that period.

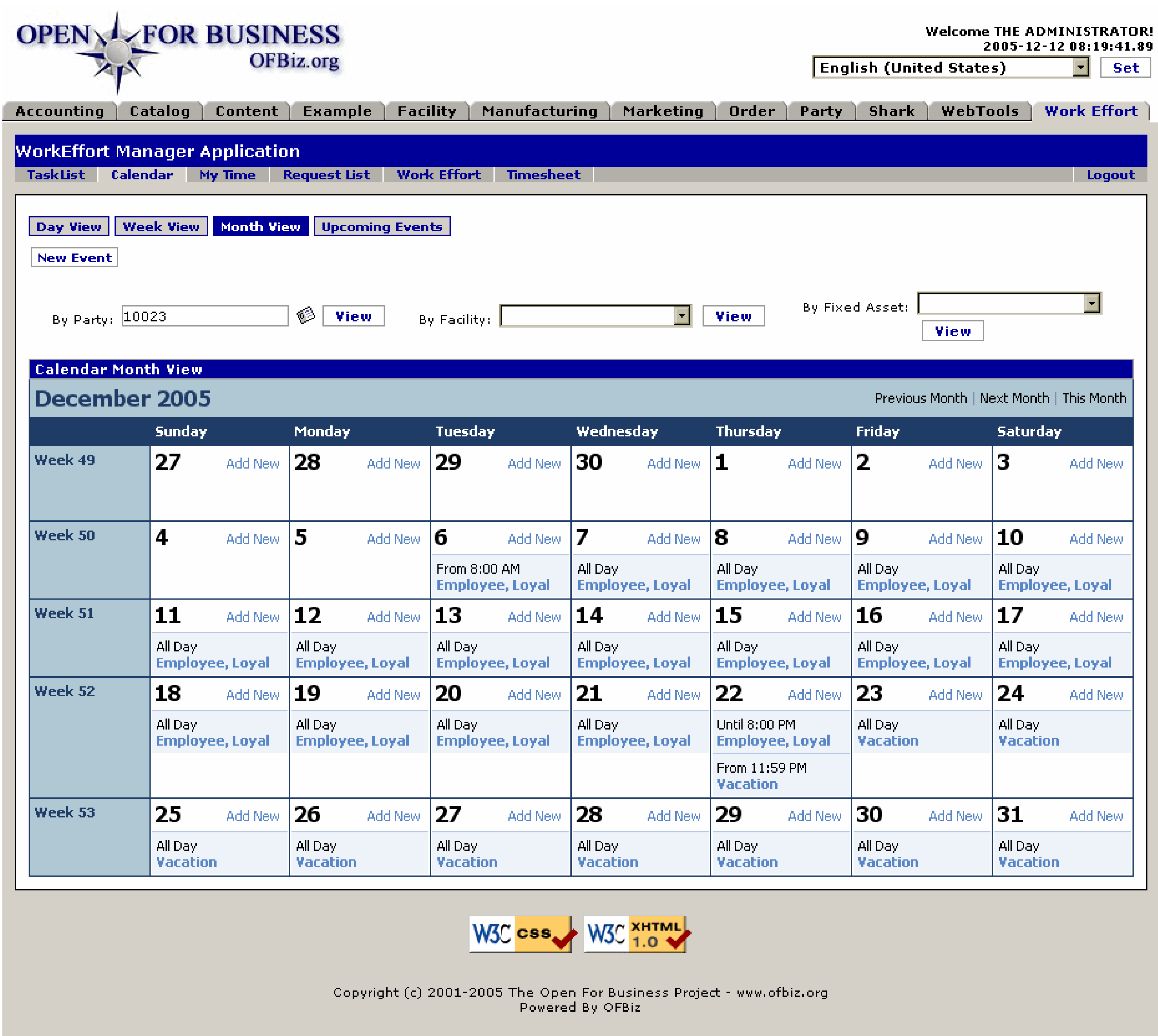
### .2.5.4 Calendar Entries

The name of the event and the time are given. Click on the name to view or edit under the Work Effort tab. Multiple events for the day are shown in additional columns, as needed.

## .2.6 Month view

Note that weeks are numbered from the beginning of the year. Click on [Add New] to enter another event within any day.

## .2.6.1 month




Space for busy days will expand as needed to accommodate more events.

## .2.6.2 link buttons

[New Event] [View] [Add New] [Previous Month] [Next Month] [This Month] [Day View] [Week View] [Month View] [Upcoming Events]

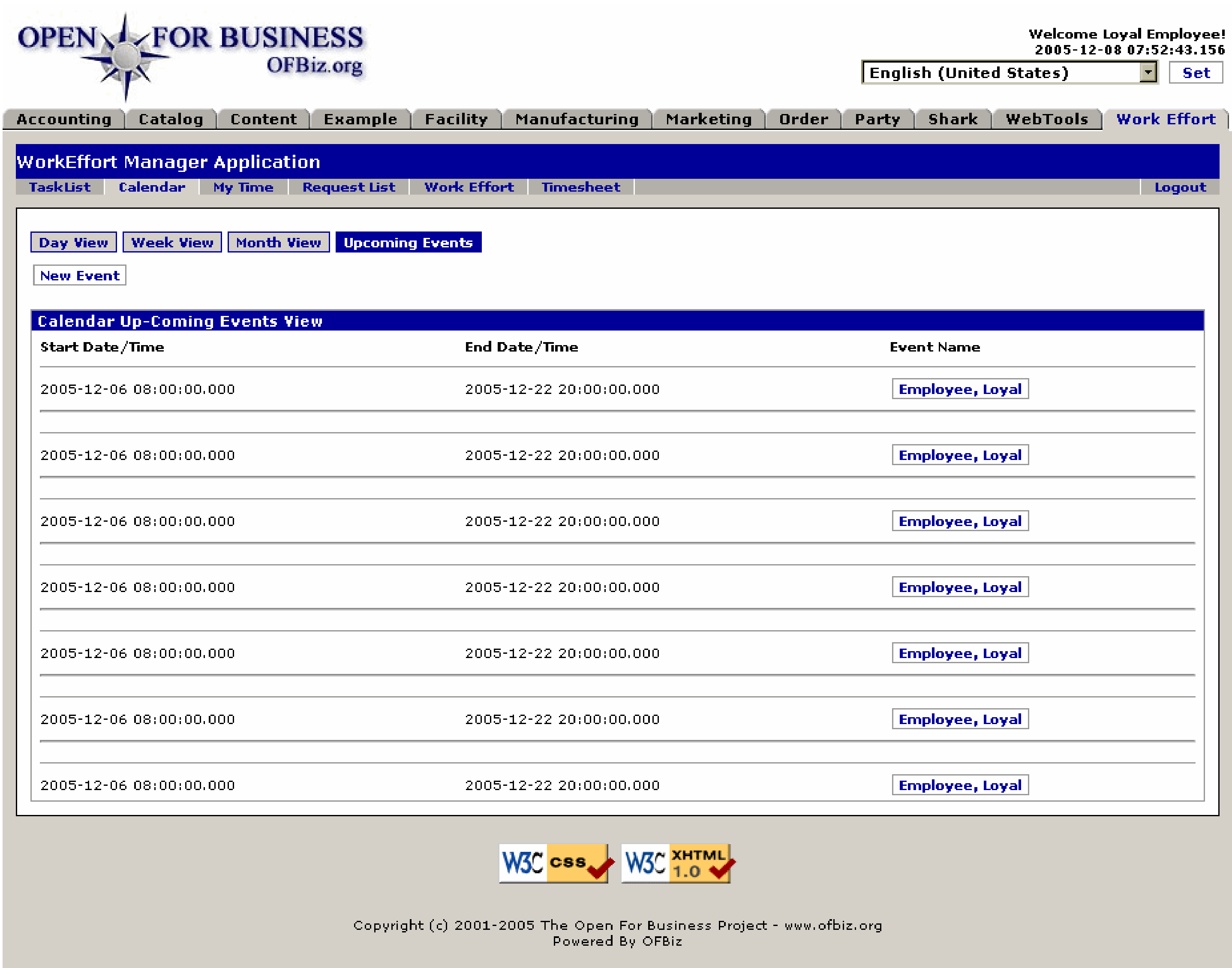
### .2.6.3 Discussion

Click on the name of any event to View or Edit that event. Click on [Add New] within any day block to add another Event to that Day. This will go into the Calendar for the logged-in Party by default.

## .2.7 Upcoming Events view

Events scheduled for the current day and into the future are listed. Click on the Event Name to be taken to the Calendar Event Details screen.

### .2.7.1 upcoming




When one event crosses multiple days, each day is shown as a separate Event, although not labeled by day here.

### .2.7.2 link buttons

[New Event] [View] [Day View] [Week View] [Month View] [Upcoming Events]

### .2.7.3 Start Date/Time

When the entire event (not just the day's segment) did or will become active.

### .2.7.4 End Date/Time

When the Event will be completed.

### .2.7.5 Event Name

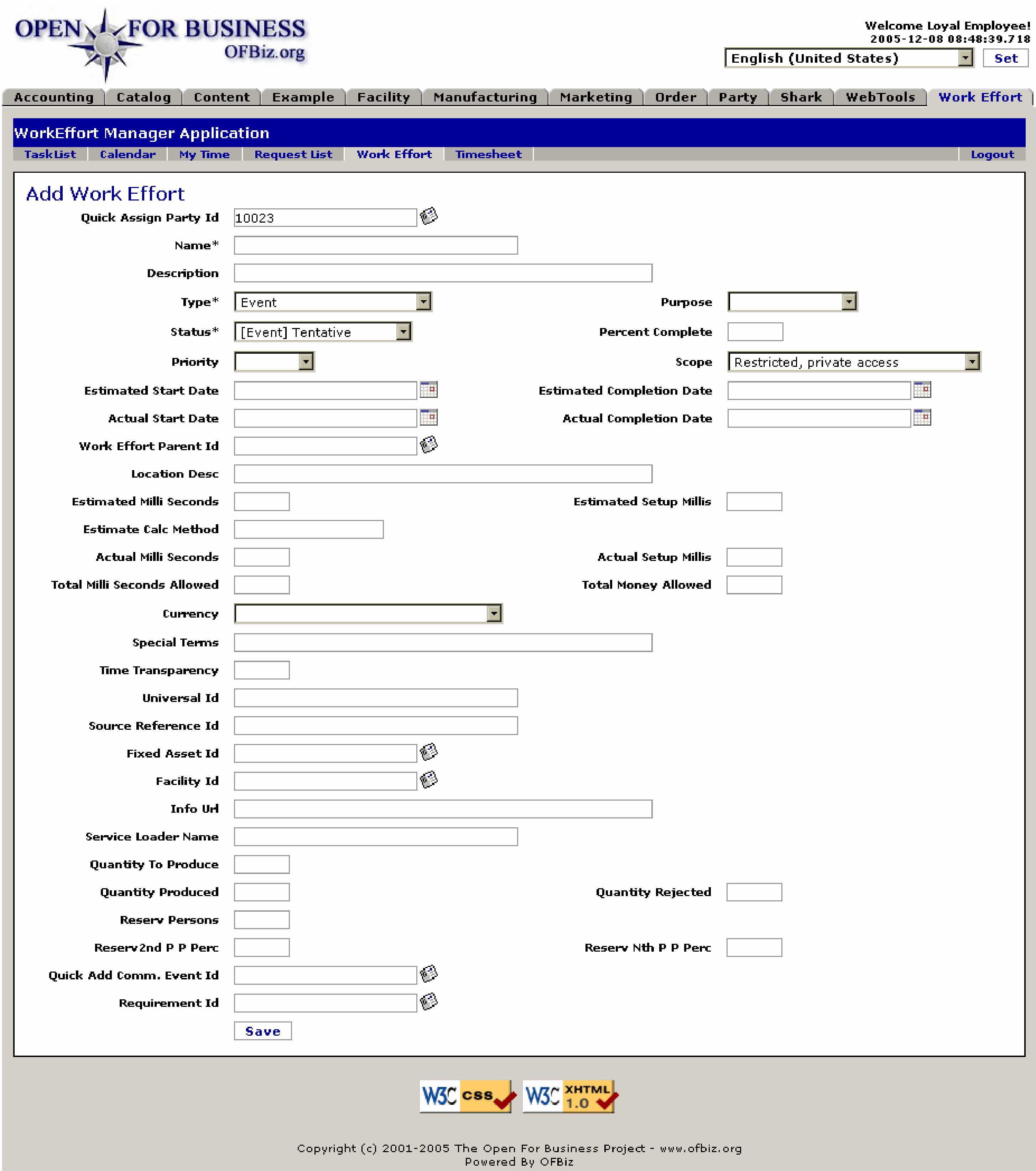
Click on this name to view or edit the event under the Work Effort tab.

## .2.8 Create New Event

### .2.8.1 Create New Event

Screen is similar to the Calendar Event Details screen but is not yet populated; see Event, following.

## .2.8.2 event-new




New Event takes you to this EditWorkEffort screen under the WorkEffort tab. See that section discussed below.

### .2.8.3 link buttons

[Save]

### .2.8.4 Discussion

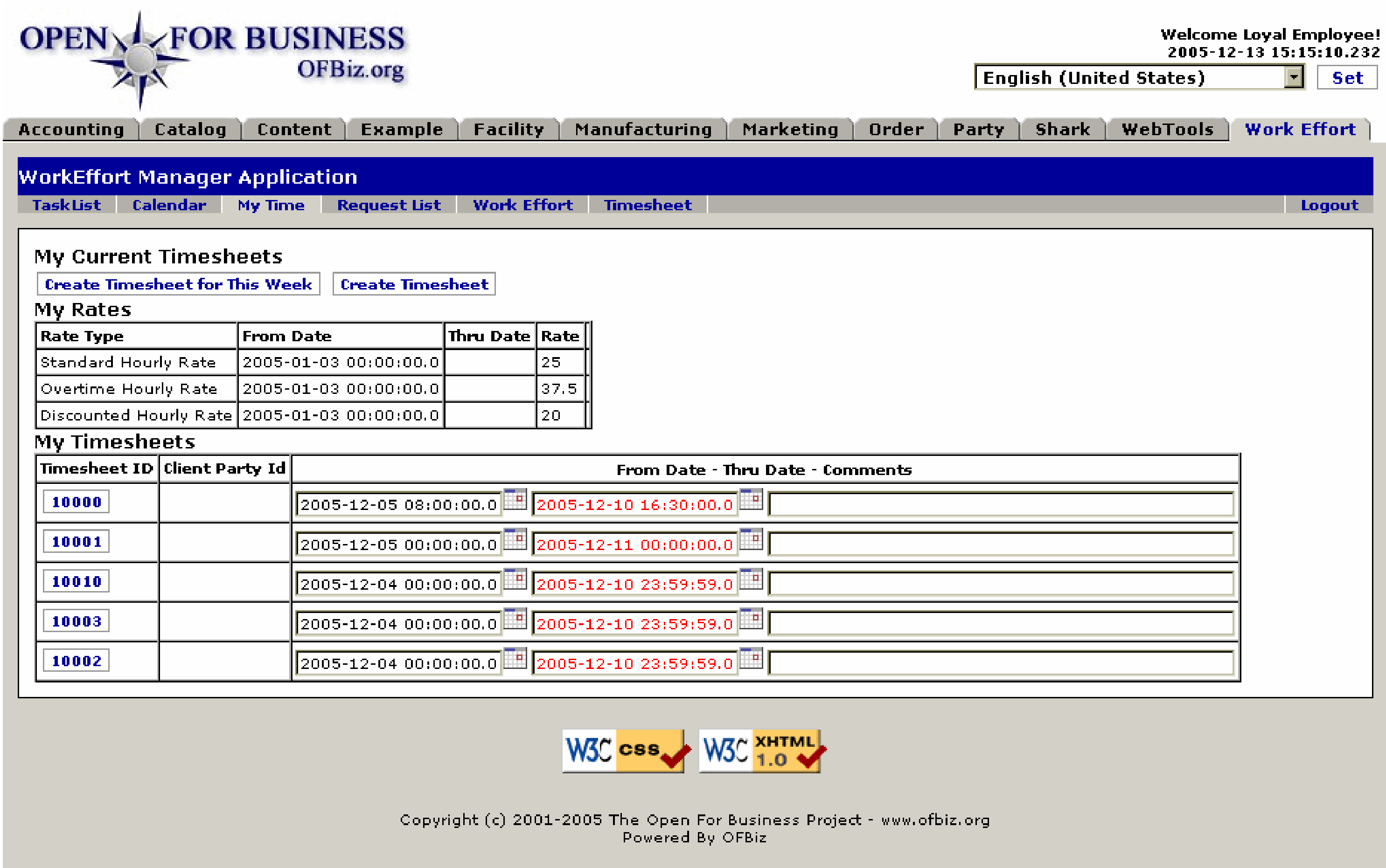
Please look under the Work Effort tab for a discussion of this screen. The same screen is used for creating Work Effort items and Calendar Events, or to edit existing ones. The only difference is in the upper left-hand corner label.

## .2.9 Event Details

When you click on an Event Name, you are taken to the Work Effort tab where you can see the details and work with that event. Please read further under the Work Effort tab.

# .3 My Time

## .3.1 MyTimesheets




Once identified by their User Login, Employees have quick access to their timesheets at this screen.

## .3.2 link buttons

[Create Timesheet for This Week] [Create Timesheet ] [Quick Time Entry] [Timesheet Entries]

## .3.3 My Current Timesheets

### .3.3.1 Link to Create Timesheet for This Week

Just click on this link once to have a new timesheet created for the current week. It will appear in the table at the bottom of this screen.

## .3.3.2 Link to Create Timesheet

### .3.3.2.1 EditTimesheet


To create a timesheet for another employee, another client, and/or another time period, use this screen.

### .3.3.2.2 Discussion

This action is performed under the Timesheet tab; please see that, below, for further details.

## .3.3.3 Timesheet Entries link

Use the Timesheet ID in the table below to quickly link to that Timesheet.

## .3.4 My Rates

Rates are set under the Party Manager > Find Party tab > Rates sub-tab. They are applied to Work Effort under the Work Effort > Rates tab. They are displayed here for information purposes only.

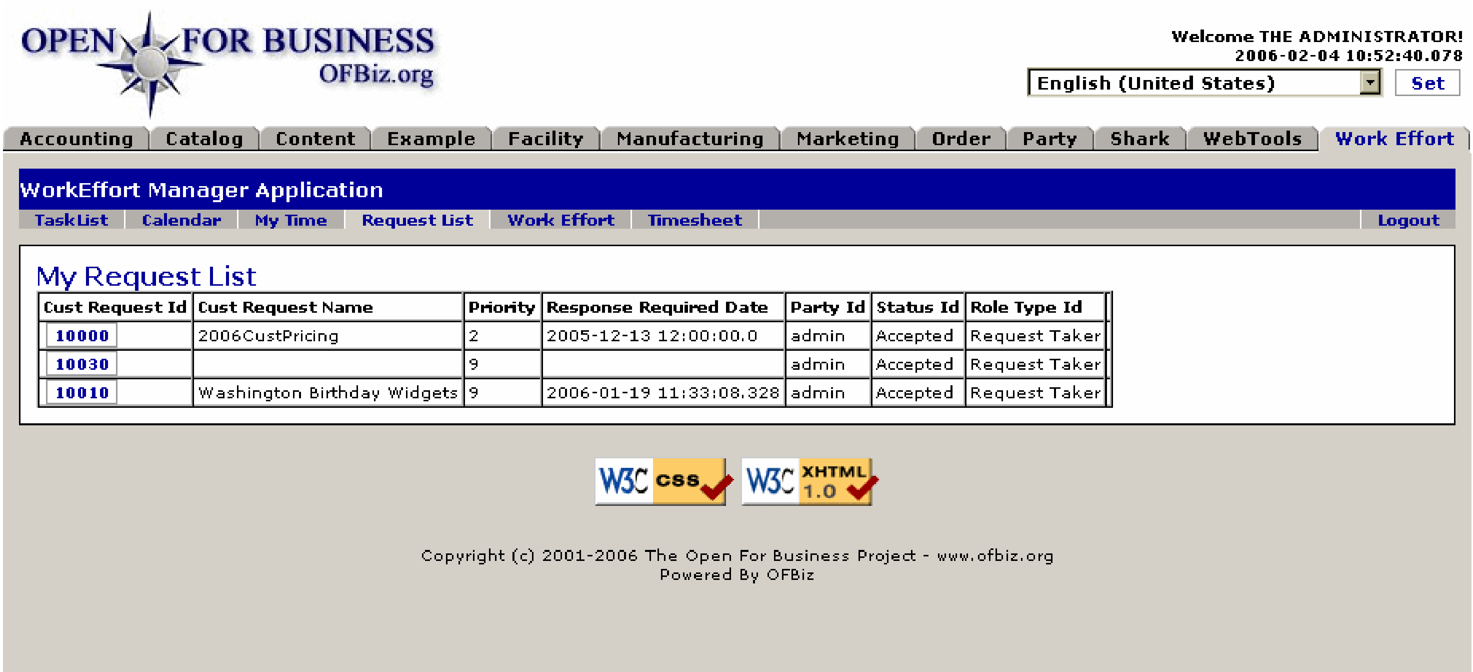
## .3.5 Table of My Timesheets

An employee may have many different Timesheets, reflecting different projects, tasks, or assignments. All current and future timesheets are listed here. Click on the Timesheet ID to edit that timesheet under the Timesheet tab.

# .4 Request List

To work with or edit a selected Request, click on the number associated with the Request under the Cust Request ID column.

## .4.1 requestlist




Current or active Requests are listed at this screen. To return to this screen, select another tab then re-select Requests.

## .4.2 link buttons

- none - except the Cust Request ID number

## .4.3 Cust Request ID

Click on the number in this column to be taken to the Edit screen for that Request. This will take you back to the Order Manager > Requests tab.

## .4.4 Cust Request Name

The name you or the Requestor assigned to the request.

## .4.5 Priority

1 - 9, 1 is highest.

## .4.6 Response Required Date

When the Requester submitted his request, he most likely asked for your response by a certain date and time. You may have negotiated a different time with him, but the determined date is what needs to be here. This is your deadline for completion of the Request.

## .4.7 Party ID

Generally, viewing this list, this would be the User ID of the person or party currently logged in. This is their list, the requests to which they are a party.

## .4.8 Status ID

As the Request is received, submitted, reviewed, accepted, completed, or has some other action taken, the Status will be changed to reflect the current condition of the process. Choices could include the following:

- —
- Accept
- Request (Accepted)
- Reject Request (Rejected)
- Review Request (Reviewed)
- Cancel Request
- (Cancelled)

## .4.9 Role Type ID

Roles are assigned to assure accountability in the process. Roles could be one of the following:

- WorkEffortRequestingParty
- Order Agent
- Request Taker
- Request Manager

## .4.10 Discussion

All of the editing of Requests is now done under the Order Manager > Requests tab. Clicking on the Request ID will take you back there.

# .5 Work Effort

## .5.1 Find Work Effort

### .5.1.1 FindWorkEffort

# Find Work Effort

Create Work Effort

WorkEffort Id — Equals / Begins With / Contains / Is Empty / Ignore Case

Work Effort Type Id

Status

Last Status Update — Equals / Same Day / Greater Than From Day Start / Greater Than / Less Than / Up To Day / Up Thru Day / Is Empty

Work Effort Purpose Type Id

Work Effort Parent Id

Scope Enum Id

Priority — Equals / Greater Than / Greater Than Equals / Less Than / Less Than Equals

Percent Complete — Equals / Greater Than / Greater Than Equals / Less Than / Less Than Equals

Work Effort Name — Equals / Begins With / Contains / Is Empty / Ignore Case

Description — Equals / Begins With / Contains / Is Empty / Ignore Case

Location Desc — Equals / Begins With / Contains / Is Empty / Ignore Case

Estimated Start Date — Equals / Same Day / Greater Than From Day Start / Greater Than / Less Than / Up To Day / Up Thru Day / Is Empty

Estimated Completion Date — Equals / Same Day / Greater Than From Day Start / Greater Than / Less Than / Up To Day / Up Thru Day / Is Empty

Actual Start Date — Equals / Same Day / Greater Than From Day Start / Greater Than / Less Than / Up To Day / Up Thru Day / Is Empty

Actual Completion Date — Equals / Same Day / Greater Than From Day Start / Greater Than / Less Than / Up To Day / Up Thru Day / Is Empty

Estimated Milli Seconds — Equals / Greater Than / Greater Than Equals / Less Than / Less Than Equals

Estimated Setup Millis — Equals / Greater Than / Greater Than Equals / Less Than / Less Than Equals

Estimate Calc Method — Equals / Begins With / Contains / Is Empty / Ignore Case

Actual Milli Seconds — Equals / Greater Than / Greater Than Equals / Less Than / Less Than Equals

Actual Setup Millis — Equals / Greater Than / Greater Than Equals / Less Than / Less Than Equals

Total Milli Seconds Allowed — Equals / Greater Than / Greater Than Equals / Less Than / Less Than Equals

Total Money Allowed — Equals / Greater Than / Greater Than Equals / Less Than / Less Than Equals

Currency

Special Terms — Equals / Begins With / Contains / Is Empty / Ignore Case

Time Transparency — Equals / Greater Than / Greater Than Equals / Less Than / Less Than Equals

Universal Id — Equals / Begins With / Contains / Is Empty / Ignore Case

Source Reference Id — Equals / Begins With / Contains / Is Empty / Ignore Case

Fixed Asset Id

Facility Id

Info Url — Equals / Begins With / Contains / Is Empty

## .5.1.2 link buttons

[Create Work Effort] [Find]

## .5.1.3 Discussion

Use the search methods discussed under other Managers with Open For Business. You may search under almost any criteria as shown here. Use the radio buttons to set ranges or to require precision with the parameters.

While the search terms mirror the full Work Effort screen terms which are discussed more completely under the Create or Edit Work Effort section, below, there are some search criteria not included in the Create/Edit screen.

Therefore, you will see some duplication but not all of these fields are found in the Edit screen.

## .5.1.4 Search fields

### .5.1.4.1 WorkEffort Id

If you know what it is, enter it here with the 'Equals' radio button selected. That will be all you need to enter.

If you know just a few characters, enter those and select the 'Begins With' or 'Contains' button. As such a search could return many hits, also identify some other known data, such as the approximate dates, to reduce the number of returns.

### .5.1.4.2 Work Effort Type Id (drop-down box)

What Type of a Work Effort is this? Select from one of the following:

- Available
- Event
- Fixed
- Asset Usage (rental)
- Production Run Header
- Production Run Task
- Program
- Project
- Project Phase
- Routing
- Routing Task
- Task
- Workflow Activity
- Workflow Process

CAUTION: If you happen to select a type different from what your sought-for Work Effort actually is, you will not be able to find it. Best to leave this field blank unless you are sure!

## .5.1.4.3 Status (drop-down box)

If you are sure what the last reported Status of the Work Effort was, you may select it from the drop-down box.

Choices might include:

- [General] Cancelled
- [General] Declined
- [General] Delegated
- [General] Needs Action
- [General] Sent
- [Task] Accepted
- [Task] Completed
- [Event] Confirmed
- [Event] Tentative

## .5.1.4.4 Last Status Update (popup calendars)

Here you have the tools to bracket the time frame within which you remember that Status of this Work Effort was last changed.

1. Choose the earliest possible date this could have been using the upper popup calendar.
2. Since you probably are not absolutely sure on the time to the second, use the radio buttons to select either Same Day (which means to disregard the time element), Greater Than From Day Start (which means it was at least a day later than selected), or Greater Than (which means it could have been anytime after the date AND TIME you have entered.
3. Choose the latest possible date and time the Status could have updated, using the lower of the two popup calendars.
4. Select a matching radio button.

If you enter nothing except this date range for your search and then press the [Find] link, you will not have a useful return. Enter at least one other item of search data, such as Status, before running the Find.

## .5.1.4.5 Work Effort Purpose Type Id (drop-down box)

What was the Purpose for the Work Effort? Select from these choices on the drop-down box:

- Assembling
- Deployment
- Development

- Email
- Maintenance
- Manufacturing
- Meeting
- Phase
- Phone Call
- Production Run
- Project
- Research
- Sub-contracting
- Support

## .5.1.4.6 Work Effort Parent Id (popup search tool)

If this Work Effort is the Child of another, identify its Parent here.

## .5.1.4.7 Scope Enum Id (drop-down box)

Some of the Enums listed are:

- General, public access
- Restricted, private access
- Very restricted, confidential access

## .5.1.4.8 Priority

If you know the assigned Priority, you may enter it into the top box and select the Equals radio button. Alternatively bracket the priority with the lowest possible number in the top box and the highest possible in the lower box, then match those numbers with the appropriate radio buttons.

## .5.1.4.9 Percent Complete

If you know the Percent Complete, you may enter it into the top box and select the Equals radio button.

Alternatively, bracket the Percent Complete with the lowest possible percentage in the top box and the highest possible in the lower box, then match those numbers with the appropriate radio buttons.

## .5.1.4.10 Work Effort Name

If you know the EXACT Work Effort Name, enter it with the Equals radio button selected.

If you know only part of the Name, enter what you know with either the Begins With or the Contains button selected, as appropriate.

If you are sure that there is no name assigned, you could leave the box blank but check the Is Empty radio button.

If not sure whether the name included UPPER or lower case letters, check the Ignore Case box.

### .5.1.4.11 Description

If you know the EXACT Description, enter it with the Equals radio button selected.

If you know only part of the Description, enter what you know with either the Begins With or the Contains button selected, as appropriate.

If you are sure that there is no Description assigned, you could leave the box blank but check the Is Empty radio button.

If not sure whether the Description included UPPER or lower case letters, check the Ignore Case box.

### .5.1.4.12 Location Desc

If you know the EXACT Location Description, enter it with the Equals radio button selected.

If you know only part of the Location Description, enter what you know with either the Begins With or the Contains button selected, as appropriate.

If you are sure that there is no Location Description assigned, you could leave the box blank but check the Is Empty radio button.

If not sure whether the Location Description included UPPER or lower case letters, check the Ignore Case box.

### .5.1.4.13 Estimated Start Date (popup calendars)

Here you have the tools to bracket the time frame within which you remember for the Estimated Start Date.

1. Choose the earliest possible date this could have been using the upper popup calendar.
2. Since you probably are not absolutely sure on the time to the second, use the radio buttons to select either Same Day (which means to disregard the time element), Greater Than From Day Start (which means it was at least a day later than selected), or Greater Than (which means it could have been anytime after the date AND TIME you have entered.
3. Choose the latest possible date and time the Estimated Start Date might have been set for, using the lower of the two popup calendars
4. Select a matching radio button.

   If you enter nothing except this date range for your search and then press the [Find] link, you will not have a useful return. Enter at least one other item of search data, such as Status, before running the Find.

### .5.1.4.14 Estimated Completion Date (popup calendars)

Here you have the tools to bracket the time frame within which you remember Estimated Completion Date was set for.

1. Choose the earliest possible date this could have been using the upper popup calendar.
2. Since you probably are not absolutely sure on the time to the second, use the radio buttons to select either Same Day (which means to disregard the time element), Greater Than From Day Start (which means it was at least a day later than selected), or Greater Than (which means it could have been anytime after the date AND TIME you have entered.
3. Choose the latest possible date and time the Estimated Completion Date could have been, using the lower of the two popup calendars.
4. Select a matching radio button.
   If you enter nothing except this date range for your search and then press the [Find] link, you will not have a useful return. Enter at least one other item of search data, such as Status, before running the Find.

### .5.1.4.15 Actual Start Date (popup calendars)

Here you have the tools to bracket the time frame within which you remember the Work Effort actually started.

1. Choose the earliest possible date this could have been using the upper popup calendar.
2. Since you probably are not absolutely sure on the time to the second, use the radio buttons to select either Same Day (which means to disregard the time element), Greater Than From Day Start (which means it was at least a day later than selected), or Greater Than (which means it could have been anytime after the date AND TIME you have entered.
3. Choose the latest possible date and time the Actual Start Date could have been, using the lower of the two popup calendars.
4. Select a matching radio button.

If you enter nothing except this date range for your search and then press the [Find] link, you will not have a useful return. Enter at least one other item of search data, such as Status, before running the Find.

### .5.1.4.16 Actual Completion Date (popup calendars)

Here you have the tools to bracket the time frame within which you remember for the Actual Completion Date.

1. Choose the earliest possible date this could have been using the upper popup calendar.
2. Since you probably are not absolutely sure on the time to the second, use the radio buttons to select either Same Day (which means to disregard the time element), Greater Than From Day Start (which means it was at least a day later than selected), or Greater Than (which means it could have been anytime after the date AND TIME you have entered.
3. Choose the latest possible date and time the Actual Completion Date was, using the lower of the two popup calendars.

4. Select a matching radio button.

If you enter nothing except this date range for your search and then press the [Find] link, you will not have a useful return. Enter at least one other item of search data, such as Status, before running the Find.

## .5.1.4.17 Estimated Milli Seconds

If you know the Estimated Milli Seconds, you may enter it into the top box and select the Equals radio button.

Alternatively, bracket the Estimated Milli Seconds with the lowest possible number in the top box and the highest possible in the lower box, then match those numbers with the appropriate radio buttons.

## .5.1.4.18 Estimated Setup Millis

If you know the Estimated Setup Millis, you may enter it into the top box and select the Equals radio button.

Alternatively, bracket the Estimated Setup Millis with the lowest possible number in the top box and the highest possible in the lower box, then match those numbers with the appropriate radio buttons.

## .5.1.4.19 Estimate Calc Method

If you know the EXACT Estimate Calc Method, enter it with the Equals radio button selected.

If you know only part of the Estimate Calc Method, enter what you know with either the Begins With or the Contains button selected, as appropriate.

If you are sure that there is no Estimate Calc Method assigned, you could leave the box blank but check the Is Empty radio button.

If not sure whether the Estimate Calc Method included UPPER or lower case letters, check the Ignore Case box.

## .5.1.4.20 Actual Milli Seconds

If you know the Actual Milli Seconds, you may enter it into the top box and select the Equals radio button.

Alternatively, bracket the Actual Milli Seconds with the lowest possible number in the top box and the highest possible in the lower box, then match those numbers with the appropriate radio buttons.

## .5.1.4.21 Actual Setup Millis

If you know the Actual Setup Millis, you may enter it into the top box and select the Equals radio button.

Alternatively, bracket the Actual Setup Millis with the lowest possible number in the top box and the highest possible in the lower box, then match those numbers with the appropriate radio buttons.

## .5.1.4.22 Total Milli Seconds Allowed

If you know the Total Milli Seconds Allowed, you may enter it into the top box and select the Equals radio button.

Alternatively, bracket the Total Milli Seconds Allowed with the lowest possible number in the top box and the highest possible in the lower box, then match those numbers with the appropriate radio buttons.

## .5.1.4.23 Total Money Allowed

If you know the Total Money Allowed, you may enter it into the top box and select the Equals radio button.

Alternatively, bracket the Total Money Allowed with the lowest possible number in the top box and the highest possible in the lower box, then match those numbers with the appropriate radio buttons.

## .5.1.4.24 Currency

Select the National Currency used in this Work Effort.

## .5.1.4.25 Special Terms

If you know the EXACT Special Terms, enter them with the Equals radio button selected.

If you know only part of the Special Terms, enter what you know with either the Begins With or the Contains button selected, as appropriate.

If you are sure that there are no Special Terms assigned, you could leave the box blank but check the Is Empty radio button.

If not sure whether the Special Terms included UPPER or lower case letters, check the Ignore Case box.

## .5.1.4.26 Time Transparency

If you know the Time Transparency factor, you may enter it into the top box and select the Equals radio button.

Alternatively, bracket the Time Transparency factor with the lowest possible number in the top box and the highest possible in the lower box, then match those numbers with the appropriate radio buttons.

## .5.1.4.27 Universal Id

If you know the EXACT Universal Id, enter it with the Equals radio button selected.

If you know only part of the Universal Id, enter what you know with either the Begins With or the Contains button selected, as appropriate.

If you are sure that there is no Universal Id assigned, you could leave the box blank but check the Is Empty radio button.

If not sure whether the Universal Id included UPPER or lower case letters, check the Ignore Case box.

## .5.1.4.28 Source Reference Id

If you know the EXACT Source Reference Id, enter it with the Equals radio button selected.

If you know only part of the Source Reference Id, enter what you know with either the Begins With or the Contains button selected, as appropriate.

If you are sure that there is no Source Reference Id assigned, you could leave the box blank but check the Is Empty radio button.

If not sure whether the Source Reference Id included UPPER or lower case letters, check the Ignore Case box.

## .5.1.4.29 Fixed Asset Id (popup search tool)

Use the popup search tool to select the Fixed Asset Id, if known.

## .5.1.4.30 Facility Id

Use the popup search tool to select the Facility Id, if known.

## .5.1.4.31 Info Url

If you know the EXACT Info Url, enter it with the Equals radio button selected.

If you know only part of the Info Url, enter what you know with either the Begins With or the Contains button selected, as appropriate.

If you are sure that there is no Info Url assigned, you could leave the box blank but check the Is Empty radio button.

If not sure whether the Info Url included UPPER or lower case letters, check the Ignore Case box.

## .5.1.4.32 Service Loader Name

If you know the EXACT Service Loader Name, enter it with the Equals radio button selected.

If you know only part of the Service Loader Name, enter what you know with either the Begins With or the Contains button selected, as appropriate.

If you are sure that there is no Service Loader Name assigned, you could leave the box blank but check the Is Empty radio button.

If not sure whether the Service Loader Name included UPPER or lower case letters, check the Ignore Case box.

### .5.1.4.33 Quantity To Produce

If you know the Quantity To Produce, you may enter it into the top box and select the Equals radio button.

Alternatively, bracket the Quantity To Produce with the lowest possible number in the top box and the highest possible in the lower box, then match those numbers with the appropriate radio buttons.

### .5.1.4.34 Quantity Produced

If you know the Quantity Producef, you may enter it into the top box and select the Equals radio button.

Alternatively, bracket the Quantity Produced with the lowest possible number in the top box and the highest possible in the lower box, then match those numbers with the appropriate radio buttons.

### .5.1.4.35 Quantity Rejected

If you know the Quantity Rejected, you may enter it into the top box and select the Equals radio button.

Alternatively, bracket the Quantity Rejected with the lowest possible number in the top box and the highest possible in the lower box, then match those numbers with the appropriate radio buttons.

### .5.1.4.36 Reserv Persons

If you know the number of Reserv Persons, you may enter it into the top box and select the Equals radio button.

Alternatively, bracket the number of Reserv Persons with the lowest possible number in the top box and the highest possible in the lower box, then match those numbers with the appropriate radio buttons.

### .5.1.4.37 Reserv2nd P P Perc

If you know the amount of Reserv2nd P P Perc, you may enter it into the top box and select the Equals radio button. Alternatively, bracket the amount of Reserv2nd P P Perc with the lowest possible number in the top box and the highest possible in the lower box, then match those numbers with the appropriate radio buttons.

### .5.1.4.38 Reserv Nth P P Perc

If you know the amount of Reserv Nth P P Perc, you may enter it into the top box and select the Equals radio button. Alternatively, bracket the amount of Reserv Nth P P Perc with the lowest possible number in the top box and the highest possible in the lower box, then match those numbers with the appropriate radio buttons.

### .5.1.4.39 Revision Number

If you know the Revision Number, you may enter it into the top box and select the Equals radio button.

Alternatively, bracket the Revision Number with the lowest possible number in the top box and the highest possible in the lower box, then match those numbers with the appropriate radio buttons.

### .5.1.4.40 Created Date (popup calendars)

Here you have the tools to bracket the time frame within which you remember that this Work Effort was actually Created.

1. Choose the earliest possible date this could have been using the upper popup calendar.
2. Since you probably are not absolutely sure on the time to the second, use the radio buttons to select either Same Day (which means to disregard the time element), Greater Than From Day Start (which means it was at least a day later than selected), or Greater Than (which means it could have been anytime after the date AND TIME you have entered.
3. Choose the latest possible date and time the Work Effort could have been Created, using the lower of the two popup calendars.
4. Select a matching radio button.

If you enter nothing except this date range for your search and then press the [Find] link, you will not have a useful return. Enter at least one other item of search data, such as Status, before running the Find.

### .5.1.4.41 Created By User Login

If you know the EXACT User Login, enter it with the Equals radio button selected.

If you know only part of the User Login, enter what you know with either the Begins With or the Contains button selected, as appropriate.

As there is always a User Login for the Creation of a Work Effort, you would not want to select the Is Empty radio button.

If not sure whether the User Login included UPPER or lower case letters, check the Ignore Case box.

### .5.1.4.42 Last Modified Date (popup calendars)

Here you have the tools to bracket the time frame within which you remember that this Work Effort was last Updated.

1. Choose the earliest possible date this could have been using the upper popup calendar.
2. Since you probably are not absolutely sure on the time to the second, use the radio buttons to select either Same Day (which means to disregard the time element), Greater Than From Day Start (which means it was at

least a day later than selected), or Greater Than (which means it could have been anytime after the date AND TIME you have entered.

3. Choose the latest possible date and time this Work Effort could have Updated, using the lower of the two popup calendars.
4. Select a matching radio button.

If you enter nothing except this date range for your search and then press the [Find] link, you will not have a useful return. Enter at least one other item of search data, such as Status, before running the Find.

### .5.1.4.43 Last Modified By User Login

If you know the EXACT User Login, enter it with the Equals radio button selected.

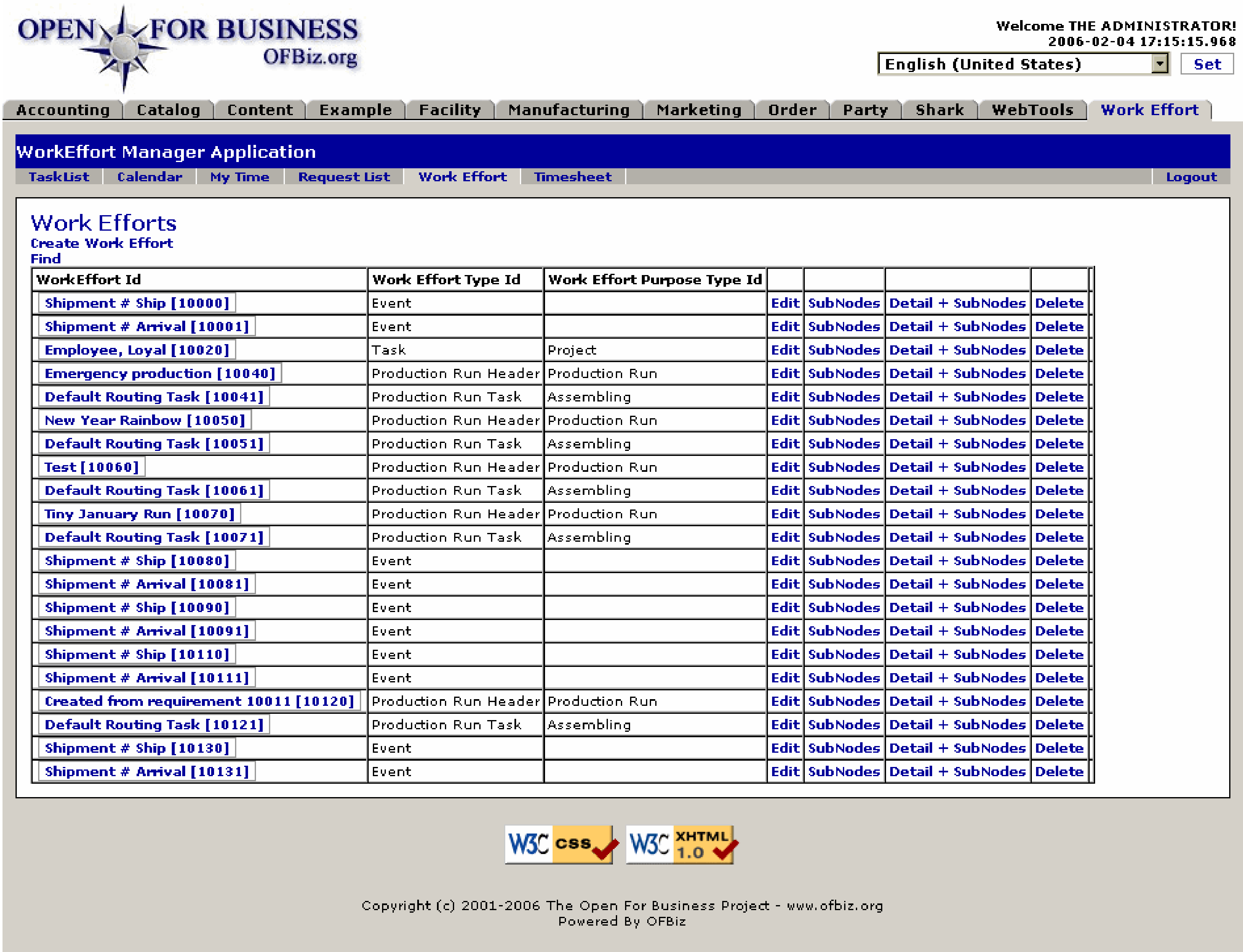
If you know only part of the User Login, enter what you know with either the Begins With or the Contains button selected, as appropriate.

If you are sure that there is no Modification, you could leave the box blank but check the Is Empty radio button.

If not sure whether the User Login included UPPER or lower case letters, check the Ignore Case box.

## .5.2 Work Effort - found

### .5.2.1 ListWorkEfforts



OPEN FOR BUSINESS OFBiz.org

Welcome THE ADMINISTRATOR!
2006-02-04 17:15:15.968
English (United States) Set

Accounting | Catalog | Content | Example | Facility | Manufacturing | Marketing | Order | Party | Shark | WebTools | Work Effort

WorkEffort Manager Application

TaskList | Calendar | My Time | Request List | Work Effort | Timesheet | Logout

Work Efforts
Create Work Effort
Find

| WorkEffort Id | Work Effort Type Id | Work Effort Purpose Type Id | | | | |
|---|---|---|---|---|---|---|
| Shipment # Ship [10000] | Event | | Edit | SubNodes | Detail + SubNodes | Delete |
| Shipment # Arrival [10001] | Event | | Edit | SubNodes | Detail + SubNodes | Delete |
| Employee, Loyal [10020] | Task | Project | Edit | SubNodes | Detail + SubNodes | Delete |
| Emergency production [10040] | Production Run Header | Production Run | Edit | SubNodes | Detail + SubNodes | Delete |
| Default Routing Task [10041] | Production Run Task | Assembling | Edit | SubNodes | Detail + SubNodes | Delete |
| New Year Rainbow [10050] | Production Run Header | Production Run | Edit | SubNodes | Detail + SubNodes | Delete |
| Default Routing Task [10051] | Production Run Task | Assembling | Edit | SubNodes | Detail + SubNodes | Delete |
| Test [10060] | Production Run Header | Production Run | Edit | SubNodes | Detail + SubNodes | Delete |
| Default Routing Task [10061] | Production Run Task | Assembling | Edit | SubNodes | Detail + SubNodes | Delete |
| Tiny January Run [10070] | Production Run Header | Production Run | Edit | SubNodes | Detail + SubNodes | Delete |
| Default Routing Task [10071] | Production Run Task | Assembling | Edit | SubNodes | Detail + SubNodes | Delete |
| Shipment # Ship [10080] | Event | | Edit | SubNodes | Detail + SubNodes | Delete |
| Shipment # Arrival [10081] | Event | | Edit | SubNodes | Detail + SubNodes | Delete |
| Shipment # Ship [10090] | Event | | Edit | SubNodes | Detail + SubNodes | Delete |
| Shipment # Arrival [10091] | Event | | Edit | SubNodes | Detail + SubNodes | Delete |
| Shipment # Ship [10110] | Event | | Edit | SubNodes | Detail + SubNodes | Delete |
| Shipment # Arrival [10111] | Event | | Edit | SubNodes | Detail + SubNodes | Delete |
| Created from requirement 10011 [10120] | Production Run Header | Production Run | Edit | SubNodes | Detail + SubNodes | Delete |
| Default Routing Task [10121] | Production Run Task | Assembling | Edit | SubNodes | Detail + SubNodes | Delete |
| Shipment # Ship [10130] | Event | | Edit | SubNodes | Detail + SubNodes | Delete |
| Shipment # Arrival [10131] | Event | | Edit | SubNodes | Detail + SubNodes | Delete |

W3C CSS W3C XHTML 1.0

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These are Work Efforts found that were created by Admin. Note the variety of Types.

### .5.2.2 link buttons

[Find] [Create Work Effort] [Edit] [SubNodes] [Detail + SubNodes] [Delete]

## .5.2.3 Table of existing Work Effort

### .5.2.3.1 Work Effort ID

Click on this to bring up the Edit Work Effort screen for this Effort.

### .5.2.3.2 Work Effort Type ID

This could be a Routing Task, an Event, a Production Run Header, etc. It is helpful to describe the type of Event.

### .5.2.3.3 Work Effort Purpose Type ID

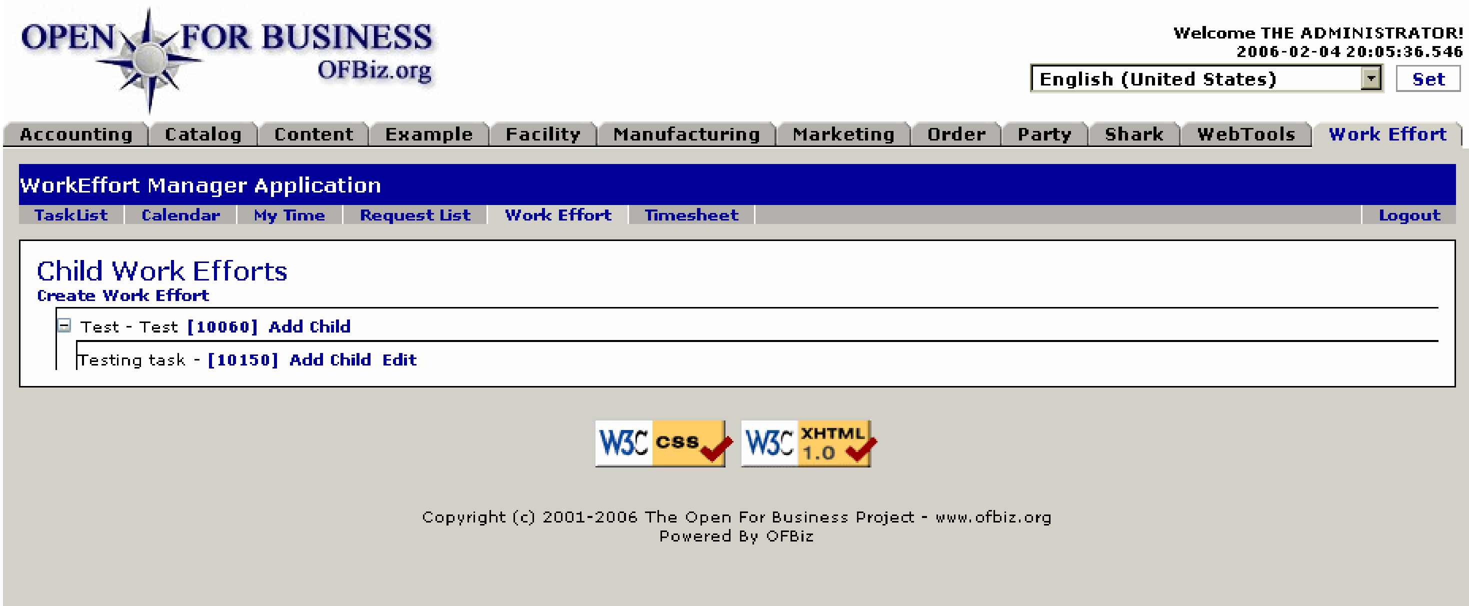
What is the purpose of this work effort?

### .5.2.3.4 Edit

Whether you click on the [Edit] link associated with the Work Effort or on the Work Effort ID in the first column, you will be taken to the Work Effort > Work Effort screen for working with this item.

## .5.2.4 SubNodes Link

### .5.2.4.1 ChildWorkEfforts



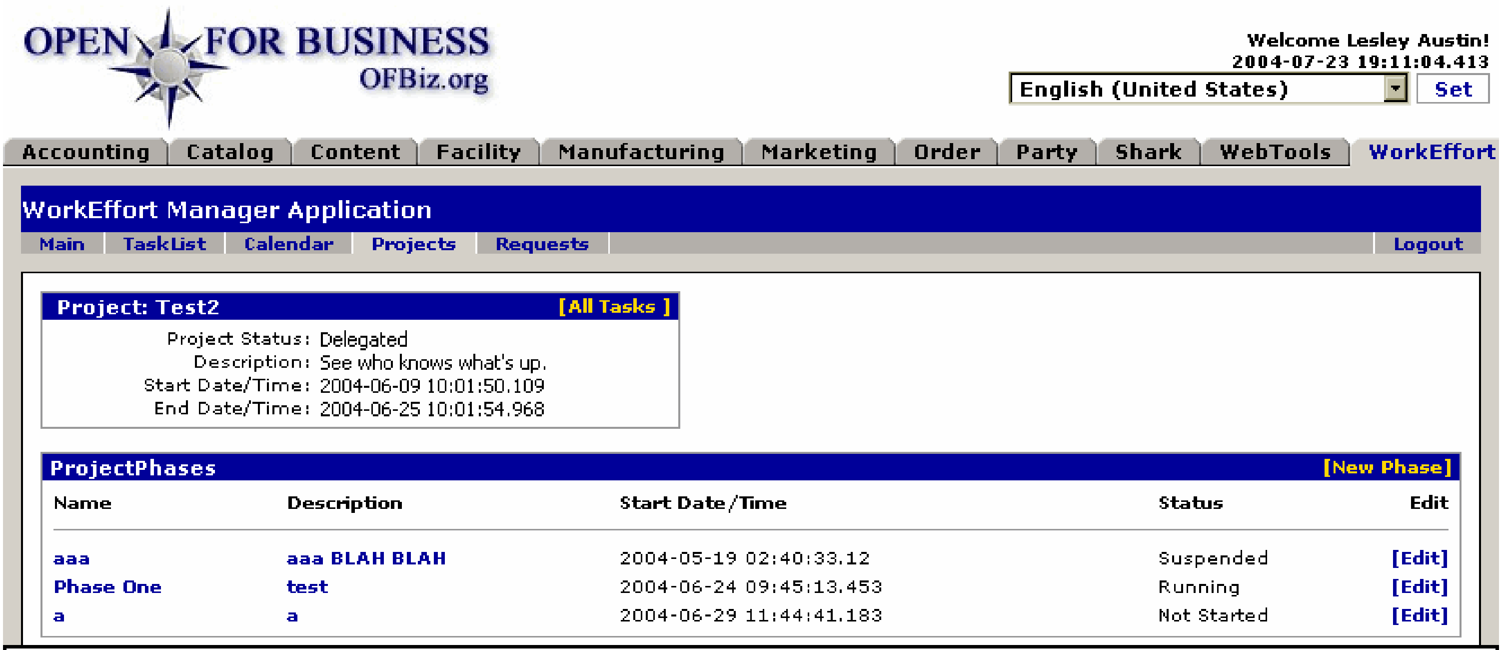

A click on the SubNodes will bring up this view of the subordinate tasks.

### .5.2.4.2 link buttons

[Create Work Effort] [Add Child] [Edit]

## .5.2.5 Detail + SubNodes link

### .5.2.5.1 phaselist



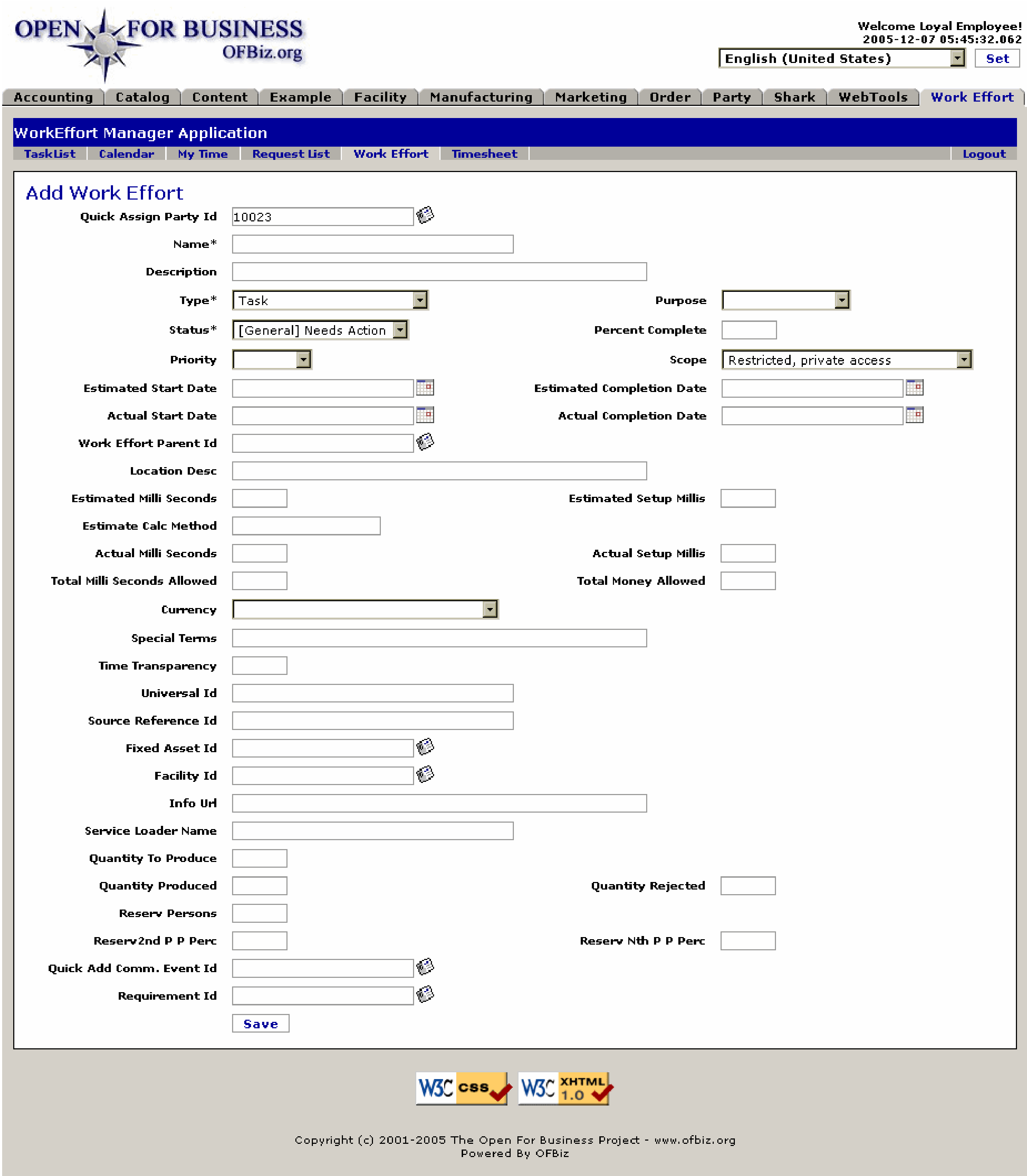

Scheduled Phases for the selected Project are displayed here.

### .5.2.5.2 Not Currently Available

The presentation for this link has been changed significantly. When the 'Details + SubNodes' screen again becomes available, an up-to-date graphic will be given here.

## .5.3 Add or Create Work Effort

### .5.3.1 EditWorkEffort




New tasks are created in a screen identical to the Edit Task screen. This is a generic screen.

### .5.3.2 link buttons

[Save]

### .5.3.3 Quick Assign Party ID (popup search tool)

Populates with the Party ID of the one logged in when creating a new Work Effort. Use the popup search tool to select a different PartyID.

### .5.3.4 Name *

Each Work Effort needs a descriptive name. This is a Required * field.

### .5.3.5 Description

Beyond naming the Work Effort, the description provides more details to distinguish from other, similar Work Efforts.

### .5.3.6 Type * (drop-down box)

What Type of a Work Effort is this? Required field. Select from one of the following:

- Available
- Event
- Fixed Asset Usage (rental)
- Production Run Header
- Production Run Task
- Program
- Project
- Project Phase
- Routing
- Routing Task
- Task
- Workflow Activity
- Workflow Process

### .5.3.7 Purpose (drop-down box)

What is the purpose for the Work Effort? Leave blank or select from the drop-down box one of the following:

- Assembling
- Deployment
- Development
- Email
- Maintenance
- Manufacturing
- Meeting
- Phase
- Phone Call
- Production Run
- Project
- Research
- Sub-contracting
- Support

## .5.3.8 Status (drop-down box)

Initial status will be one of the following, selected from the drop-down box:

- (General) Cancelled
- (General) Decline
- (General) Delegated
- (General) Needs Action
- (General) Sent
- (Task) Accepted
- (Task) Completed
- (Event) Confirmed
- (Event) Tentative

## .5.3.9 Percent Complete

How much of the effort has already been accomplished at the time of this documentation update? Enter the amount of work accomplished as a percent of the total expected for completion.

## .5.3.10 Priority (drop-down box)

Enter 1 through 9, with 1 the highest.

## .5.3.11 Scope (drop-down box)

Refers to access to the Work Effort and its documentation. Choices from the drop-down box currently include:

- General, public access.
- Restricted, private access.
- Very restricted, confidential access.

## .5.3.12 Estimated Start Date (popup calendar)

Use the popup calendar or enter the day and time when you expect the Work Effort described to begin.

## .5.3.13 Estimated Completion Date (popup calendar)

Use the popup calendar or enter the day and time when you expect the Work Effort described to finish.

## .5.3.14 Actual Start Date (popup calendar)

Use the popup calendar or enter the day and time when you actually began the Work Effort described.

## .5.3.15 Actual Completion Date (popup calendar)

Use the popup calendar or enter the day and time when you actually finished the Work Effort described.

## .5.3.16 Quick Add Comm. Event ID (popup search tool)

Associate communications that may have been instrumental in starting or processing this Work Effort.

## .5.3.17 Work Effort Parent ID (popup search tool)

If this Work Effort is a child of another Work Effort, enter that here or use the popup search tool to indentify the Parent.

## .5.3.18 Location Desc

Describe the Location where the Work Effort will be accomplished, if necessary.

## .5.3.19 Estimated Milli Seconds

How long will it take to accomplish this work effort? This is more appropriate to manufacturing tasks. Figure how many seconds the process will take, then multiply that by 1000 and enter the number here.

### .5.3.20 Estimated Setup Millis

How long will it take to setup the equipment and materiel for this work effort? This is more appropriate to manufacturing tasks. Figure how many seconds the setup will take, then multiply that by 1000 and enter the number here.

### .5.3.21 Estimate Calc Method

What method was used to Calculate this Estimate?

### .5.3.22 Actual Milli Seconds

If the work has already been accomplished, how long did it take to accomplish this work effort? This is more appropriate to manufacturing tasks. Take how many seconds the process actually required, then multiply that by 1000 and enter the number here.

### .5.3.23 Actual Setup Millis

If the work has already been accomplished, how long did it take to accomplish the setup? This is more appropriate to manufacturing tasks. Take how many seconds the setup actually required, then multiply that by 1000 and enter the number here.

### .5.3.24 Total Milli Seconds Allowed

Besides the setup time and the actual accomplishment time, you may need to allow for getting into position, taking breaks, inspecting the work, etc. Add that time to the estimated setup time and the estimated accomplishment time in seconds, multiply by 1000 and enter the milliseconds here for the total.

### .5.3.25 Total Money Allowed

What amount of currency is budgeted for the entire work effort?

### .5.3.26 Currency (drop-down box)

Which currency forms the basis of this work effort? Select from the drop-down box.

### .5.3.27 Special Terms

Limitations, expectations, anything out of the ordinary which affects the performance of this Work Effort should be identified here.

### .5.3.28 Time Transparency

TBD.

### .5.3.29 Universal ID

TBD.

### .5.3.30 Source Reference ID

If this Work Effort were driven by some other document other than what has already been specified, identify it here.

### .5.3.31 Fixed Asset ID (popup search tool)

Locate a Fixed Asset to be assigned to this Work Effort from the popup search tool.

### .5.3.32 Facility ID (popup search tool)

Identify and specify the Facility using the popup search tool.

### .5.3.33 Info URL

Web-based data sources related to this Work Effort can be identified here.

### .5.3.34 Service Loader Name

TBD.

### .5.3.35 Quantity To Produce

If this is a production-driven Work Effort, specify the quantity here.

## .5.3.36 Quantity Produced

Upon completion, how many were produced.

## .5.3.37 Quantity Rejected

Of those produced under this Work Effort, how many had to be rejected?

## .5.3.38 Reserv Persons

TBD.

## .5.3.39 Reserv2nd P P Perc

TBD.

## .5.3.40 Reserv Nth P P Perc

TBD.

## .5.3.41 Requirement ID (popup search tool)

If not already populated, whatever Requirement may have driven this Work Effort can be associated with it here.

## .5.4 Edit Work Effort

## .5.4.1 Summary

### .5.4.1.1 WorkEffortSummary


Summarizes the essential details of the selected Work Effort. The only link besides the sub-tabs is the Party ID.

### .5.4.1.2 link buttons

[Summary] [Work Effort] [Children] [Parties] [Rates] [Communications] [Shopping Lists] [Requests] [Requirements] [Quotes] [Orders] [Time Entries]

### .5.4.1.3 Work Effort section

This could report information on the following topics:

- Name:
- Type:
- Purpose:
- Status:
- Percent Complete:
- Priority:
- Estimated Start Date:
- Estimated Completion Date:

### .5.4.1.4 Party Assignments section

This could report on the following topics:

- Party ID:
- Role:
- Status:
- Expectation:

### .5.4.1.5 Communication Events section

All related Communication Events are listed including their Event ID and Name.

### .5.4.1.6 Shopping Lists

Any related Shopping Lists for the Party or Party Group are listed here. This could include a list of parts or supplies needed from a vendor or from storage to perform a certain assembly process. Don't let the name 'Shopping List' limit what you can do with this useful link.

### .5.4.1.7 Quotes

Quotations prepared to support this Work Effort could be listed here.

### .5.4.1.8 Orders

If this Work Effort is to support a Sales Order received or if a Purchase Order was made to support the Work Effort, the Order ID with details would be given here.

## .5.4.2 Work Effort

### .5.4.2.1 editWorkEffort

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OFBiz.org

Welcome THE ADMINISTRATOR!
2006-02-06 08:46:02.718

English (United States) | Set

Accounting | Catalog | Content | Example | Facility | Manufacturing | Marketing | Order | Party | Shark | WebTools | Work Effort

WorkEffort Manager Application

TaskList | Calendar | My Time | Request List | Work Effort | Timesheet | Logout

Summary | Work Effort | Children | Parties | Rates | Communications | Shopping Lists | Requests | Requirements | Quotes | Orders | Time Entries

## WorkEffortId: 10160
## Edit Work Effort

Create Work Effort

| | | | |
|---|---|---|---|
| WorkEffort Id | 10160 -[cannot change without re-creating]- | | |
| Name* | March Newsletter | | |
| Description | Develop content, edit and publish the BLOG NewsLetter for March | | |
| Type* | Task | Purpose | Support |
| Status* | [Task] Accepted | Percent Complete | |
| Priority | 2 | Scope | General, public access |
| Estimated Start Date | 2006-02-01 07:47:50.984 | Estimated Completion Date | 2006-02-28 07:47:50.984 |
| Actual Start Date | 2006-02-02 08:44:25.515 | Actual Completion Date | |
| Quick Add Comm. Event Id | | | |
| Work Effort Parent Id | | | |
| Location Desc | Worksite = Carla Consultant Studios | | |
| Estimated Milli Seconds | | Estimated Setup Millis | |
| Estimate Calc Method | | | |
| Actual Milli Seconds | | Actual Setup Millis | |
| Total Milli Seconds Allowed | | Total Money Allowed | 5,000 |
| Currency | [USD] - American Dollar | | |
| Special Terms | 160 hours @ $25/hour | | |
| Time Transparency | | | |
| Universal Id | | | |
| Source Reference Id | | | |
| Fixed Asset Id | | | |
| Facility Id | | | |
| Info Url | | | |
| Service Loader Name | | | |
| Quantity To Produce | | | |
| Quantity Produced | | Quantity Rejected | |
| Reserv Persons | | | |
| Reserv2nd P P Perc | | Reserv Nth P P Perc | |
| Revision Number | 5 | | |

Save

W3C CSS | W3C XHTML 1.0



Work Effort has been accepted and the actual Start Date entered here in Rev. 5.

### .5.4.2.2 link buttons

[Save] [Create Work Effort] [Summary] [Work Effort] [Children] [Parties] [Rates] [Communications] [Shopping Lists] [Requests] [Requirements] [Quotes] [Orders] [Time Entries]

### .5.4.2.3 Discussion

1. The following fields are * Required and must be completed:

- Name
- Type
- Status#

1. The fields here were all discussed above under Add or Create Work Effort EXCEPT for those fields given below.
2. Be sure to click on the [Save] link after making any changes you want to keep.
3. Changes made under the other tabs will be reflected in this screen when you return here. You should generally make your changes under those tabs and use this screen primarily to review all the information in one place.

### .5.4.2.4 Work Effort ID

This is ID of the item that you are editing. It cannot be changed here. If you wish to work on another Work Effort ID, return to the Find Work Effort screen.

### .5.4.2.5 Revision Number

With each change submitted to this Work Effort, the Revision Number will increment. Located as the last item on the screen, this replaces the Requirement ID field found there with the Create Work Effort screen.

# .5.4.3 Children

## .5.4.3.1 ChildWorkEfforts-2


View Child relationships and link to [Add Child] or [Edit] as needed.

## .5.4.3.2 link buttons

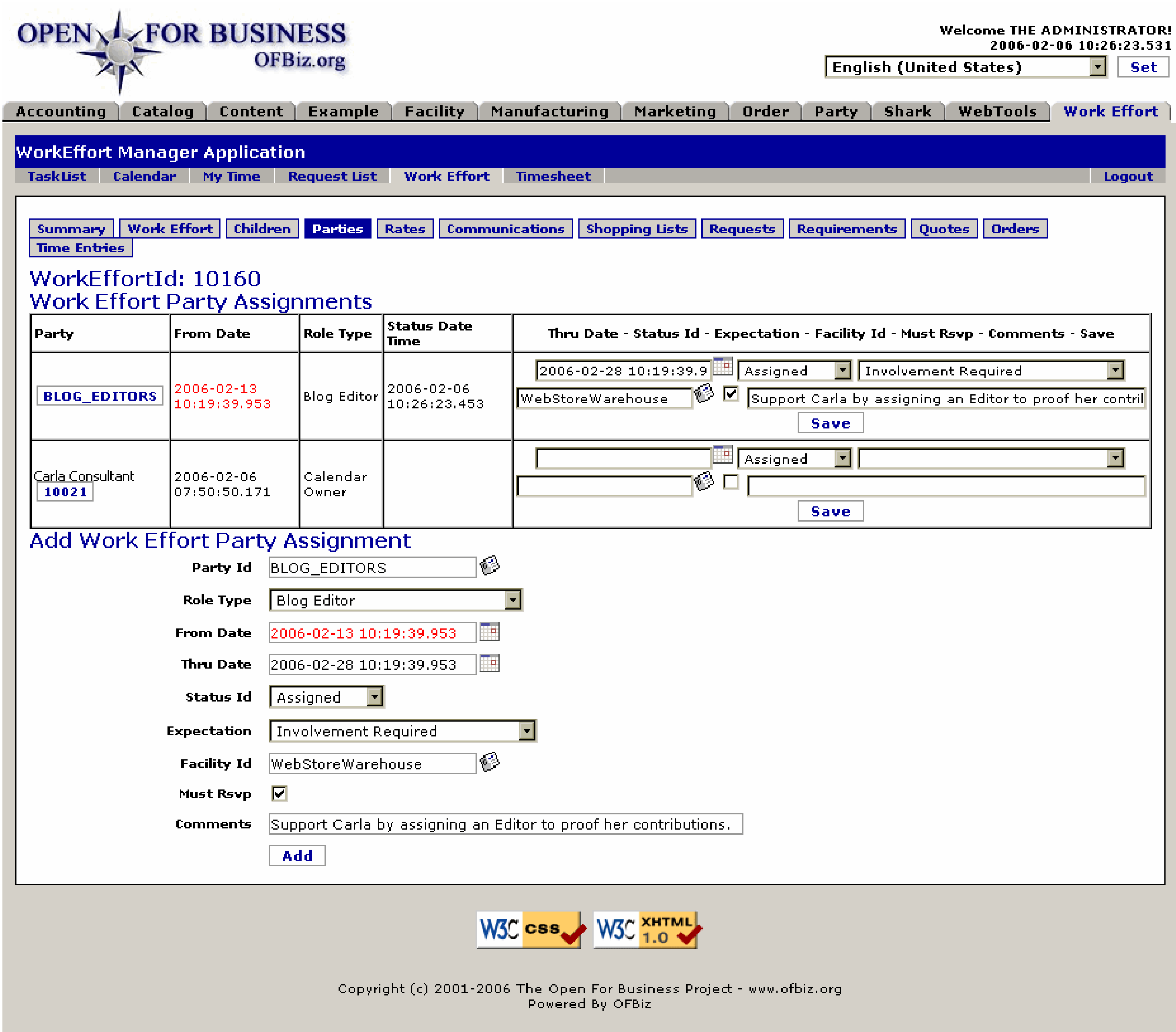
[Add Child] [Create Work Effort] [Summary] [Work Effort] [Children] [Parties] [Rates] [Communications] [Shopping Lists] [Requests] [Requirements] [Quotes] [Orders] [Time Entries]

## .5.4.3.3 Discussion

Displays the top (selected) event, then shows chilren down as many generations as exist.

# .5.4.4 Parties

## .5.4.4.1 ListWorkEffortPartyAssigns




All Parties assigned to the Work Effort are listed; update in table or add others with the tool.

## .5.4.4.2 link buttons

[Save] [Add] [Summary] [Work Effort] [Children] [Parties] [Rates] [Communications] [Shopping Lists] [Requests] [Requirements] [Quotes] [Orders] [Time Entries]

### .5.4.4.3 Table of Work Effort Party Assignments

#### .5.4.4.3.1 Party

Click on the Party ID to view or edit details under the Party Manager.

#### .5.4.4.3.2 From Date (and time)

When the Party was assigned to this Work Effort.

#### .5.4.4.3.3 Role Type

What type of role this Party has with this Work Effort.

#### .5.4.4.3.4 Status Date Time

When the Status is changed, that is reflected in these fields.

#### .5.4.4.3.5 Thru Date (popup calendar)

If the assignment is supposed to expire, the date should be given here. Enter here if needed.

#### .5.4.4.3.6 Status ID (drop-down box)

Status options include:

- —
- Assigned
- Offered
- Unassigned

#### .5.4.4.3.7 Expectation (drop-down box)

When a Party assignment is made against a Work Effort ID, there is a level of expectation from that Party by the one making the assignment. The choices available from the drop-down box could include the following:

- For Your Information
- Immediate Response Requested

- Involvement Requested
- Involvement
- Required

## .5.4.4.3.8 Facility ID (popup search tool)

Select the affected Facility from the popup search tool.

## .5.4.4.3.9 Must RSVP (check box)

If a reply from the requested Party is required, this box will be checked.

## .5.4.4.3.10 Comments

Any other information needed can be found here.

## .5.4.4.4 Tool to Add Work Effort Party Assignment

## .5.4.4.4.1 Party ID (popup tool)

Select a Party ID from the popup search tool.

## .5.4.4.4.2 Role Type (drop-down box)

What type of role does this Party have with this Work Effort? Select from the drop-down box.

## .5.4.4.4.3 From Date (popup calendar)

When the Party is assigned a role in the Work Effort. Defaults to Now. Use the popup calendar to insert a different date.

## .5.4.4.4.4 Thru Date (popup calendar)

When the assignment will cease or terminate. Do not enter a date unless you wish the assignment to expire at a particular time and date unless this is a historical entry and you are recording the concluding time.

### .5.4.4.4.5 Status ID (drop-down box)

Status options include:

- —
- Assigned
- Offered
- Unassigned

### .5.4.4.4.6 Expectation (drop-down box)

When a Party assignment is made against a Work Effort ID, there is a level of expectation from that Party by the one making the assignment. The choices available from the drop-down box could include the following:

- For Your Information
- Immediate Response Requested
- Involvement Requested
- Involvement
- Required

### .5.4.4.4.7 Facility ID (popup search tool)

Select the affected Facility from the popup search tool.

### .5.4.4.4.8 Must RSVP (check box)

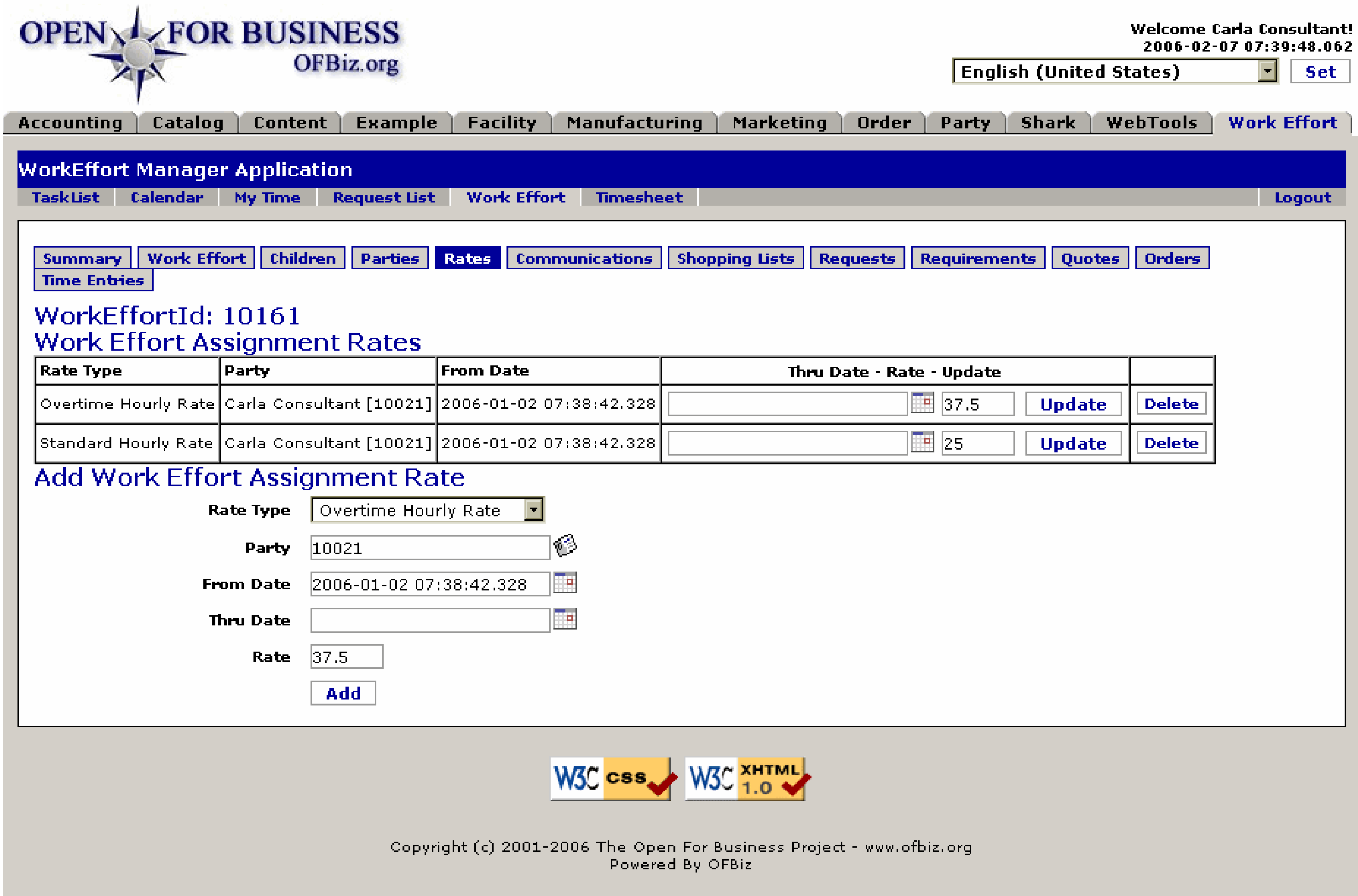
If a reply from the requested Party is required, this box should be checked.

### .5.4.4.4.9 Comments

Any other information needed can be added here.

## .5.4.5 Rates

### .5.4.5.1 EditWorkEffortAssignmentRates




Rates associated with the Work Effort are listed in the table; add others with the tool. May differ from rates under Party manager.

### .5.4.5.2 link buttons

[Update] [Delete] [Add] [Summary] [Work Effort] [Children] [Parties] [Rates] [Communications] [Shopping Lists] [Requests] [Requirements] [Quotes] [Orders] [Time Entries]

### .5.4.5.3 Table of Work Effort Assignment Rates

#### .5.4.5.3.1 Rate Type

Rate types could include the following:

- Discounted Hourly Rate
- Overtime Hourly Rate
- Standard Hourly Rate

#### .5.4.5.3.2 Party (and Party ID)

The Party whose rates are being applied to this Work Effort.

#### .5.4.5.3.3 From Date

The Date and Time from which this rate is effective for this Party on this Work Effort.

#### .5.4.5.3.4 Thru Date (popup calendar)

The Date and time (which can be modified here within the table) after which this Rate assignment is no longer valid.

#### .5.4.5.3.5 Rate

The amount in currency which represents the Rate for this Party on this Work Effort during the established time period. This amount can be changed within the Table; [Update] to make any changes effective.

### .5.4.5.4 Tool to Add Work Effort Assignment Rate

#### .5.4.5.4.1 Rate Type (drop-down box)

Rate types could include the following:

- Discounted Hourly Rate
- Overtime Hourly Rate
- Standard Hourly Rate

### .5.4.5.4.2 Party (popup search tool)

Use the popup search to identify the Party being assigned the Rate for this Work Effort.

### .5.4.5.4.3 From Date (popup calendar)

Defaults to Now. Enter a different date using the popup calendar. This is the date at which the rate will be effective for this Party on this Work Effort only.

### .5.4.5.4.4 Thru Date (popup calendar)

The Date and time (which can be modified later within the table) after which this Rate assignment is no longer valid.

### .5.4.5.4.5 Rate

Enter the amount (including decimals but without currency symbols) which will be the Rate for this Rate Type on this Work Effort by this Party. Currency type is set in the basic Edit Work Effort screen.

## .5.4.6 Communications

### .5.4.6.1 ListWorkEffortCommEvents

OPEN FOR BUSINESS OFBiz.org

Welcome Carla Consultant!
2006-02-07 07:57:44.531
English (United States) Set

Accounting | Catalog | Content | Example | Facility | Manufacturing | Marketing | Order | Party | Shark | WebTools | Work Effort

WorkEffort Manager Application

TaskList | Calendar | My Time | Request List | Work Effort | Timesheet | Logout

Summary | Work Effort | Children | Parties | Rates | Communications | Shopping Lists | Requests | Requirements | Quotes | Orders | Time Entries

## WorkEffortId: 10160

## Work Effort Communication Events

| Communication Event Id | Status Id | Contact Mech Type Id | Description - Update | |
|---|---|---|---|---|
| 10050 | Entered | Email Address | Report of current progress on March N Update | Delete |

## Add Work Effort Communication Event

Enter existing CommunicationEvent Id below

**Communication Event Id** 10050

OR add new CommunicationEvent data below to create new entity (leave CommunicationEvent Id empty)

**Description** Report of current progress on March Newsletter content.

**Communication Event Type Id** Letter

**Party From** 10021

**Party To** admin

**Status**

**Contact Mech Type Id** Email Address

**From Contact Mech**

**To Contact Mech**

**Role Type Id From** Contractor

**Role Type Id To** Administrator

**Contact List Id**

**Start Date**

**Finish Date/Time**

**Subject** Progress Report on March Newsletter

**Content Mime Type Id** application/msword

**Content** Have made good progress in developing the March Newsletter around the theme of 'Almost Spring.' Drafts will be submitted to the Editors on Friday, February 10, by noon.

**Note** Sent from MS Word through email.

Add



This screen both reports previous communications and provides Communication tools.

### .5.4.6.2 link buttons

[Update] [Delete] [Add] [Summary] [Work Effort] [Children] [Parties] [Rates] [Communications] [Shopping Lists] [Requests] [Requirements] [Quotes] [Orders] [Time Entries]

### .5.4.6.3 Table of Work Effort Communication Events

#### .5.4.6.3.1 Communication Event ID

Click on the ID to view or edit the Communication under the Party Manager > Comm tab > CommEvent sub tab.

#### .5.4.6.3.2 Status ID

Current status of the Communication Event. Go to the Party Manager > Comm Tab with this Communication to change the Status.

#### .5.4.6.3.3 Contact Mech Type ID

What method of communication was use.

#### .5.4.6.3.4 Description

What the Communication is about. This can be changed here in the table; [Update] when the change is made.

### .5.4.6.4 Tool to Add Work Effort Communication Event

#### .5.4.6.4.1 Communication Event ID (popup search tool)

Either enter the ID of an existing Communication Event here (use the popup search tool to find it), or create a new Communication in the fields following this one.

#### .5.4.6.4.2 Description

Describe the Communication as it relates to the Work Effort.

NOTE: Do NOT enter a Communication Event ID in the field above if you are using this screen to create a new Communication Event.

## .5.4.6.4.3 Communication Event Type ID (drop-down box)

Types of Communication Events could include:

- Comment/Note
- Email
- Face-To-Face
- Fax
- Letter
- Phone
- Web Site

## .5.4.6.4.4 Party From (popup search tool)

The originating Party. If this is a reply, it will be the Party making the Reply. Use the popup search tool to identify the Party, or enter the ID directly.

## .5.4.6.4.5 Party To (popup search tool)

The Party to whom the communication is being sent. Use the popup search tool to identify the Party, or enter the ID directly.

## .5.4.6.4.6 Status (drop-down box)

What stage in the communications cycle is this Comm Event at? For example, 'COM_ENTERED' would indicate that it has been started but not yet acknowledged, answered, or acted upon.

## .5.4.6.4.7 Contact Mech Type ID (drop-down box)

What contact mechanism will be used? Note that any Contact Mechanism can only be used if it is already established for the Party. Select from among the following:

- Electronic Address
- Email Address
- Internet Domain Name
- Internet IP Address
- Phone Number
- Postal Address
- Web
- URL/Address

### .5.4.6.4.8 From Contact Mech

This would be the phone number, email address, or whatever the selected Mechanism might be for the sending Party.

### .5.4.6.4.9 To Contact Mech

This would be the phone number, email address, or whatever the selected Mechanism might be for the receiving Party.

### .5.4.6.4.10 Role Type Id From (drop-down box)

What was the Role of the Party originating the Communication? Select from among the potential roles shown in the drop-down box.

### .5.4.6.4.11 Role Type Id To (drop-down box)

What was the Role of the Party receiving the Communication? Select from among the potential roles shown in the drop-down box.

### .5.4.6.4.12 Contact List Id (popup search tool)

If there is a related Contact List to which the Communication is being dispatched, identify it here from the popup search tool.

### .5.4.6.4.13 Start Date (popup calendar)

Defaults to Now.

### .5.4.6.4.14 Finish Date/Time (popup calendar)

Probably the date and time after which the terms of the Communication would no longer be effective.

### .5.4.6.4.15 Subject

What the Communication is about.

## .5.4.6.4.16 Mime Type Id (drop-down box)

What type of format is used in the Communication? Mime Types selected from the drop-down box could include one of the following:

- application - msword, pdf, zip, etc.
- audio - basic, mpeg, etc.
- image - gif, jpeg, tiff, etc.
- message - http, news, s-http, etc.
- model -
- mesh, vrml, etc.
- multipart - digest, encrypted, signed, etc.
- text - html, rtf,
- tab-separated-values, etc.
- video - mpeg, quicktime, etc.

## .5.4.6.4.17 Content

What the Communication is trying to say or convey. This is the heart of the Communication.

## .5.4.6.4.18 Note

Information about the Communication Event, NOT the actual content of the Communication.

# .5.4.7 Shopping Lists

## .5.4.7.1 ListWorkEffortShopLists


Shopping Lists associated with a Work Effort are listed here.

## .5.4.7.2 link buttons

[Delete] [Add] [Summary] [Work Effort] [Children] [Parties] [Rates] [Communications] [Shopping Lists] [Requests] [Requirements] [Quotes] [Orders] [Time Entries]

## .5.4.7.3 Table of Work Effort Shopping Lists

## .5.4.7.3.1 Shopping List ID

Click on this to edit the Shopping List under the Party Manager.

## .5.4.7.3.2 Type

What Type of shopping list this is: 'Wish List,' 'Frequent Purchases,' etc.

### .5.4.7.3.3 ListName

What the List is called.

### .5.4.7.3.4 Description

Tells you more about the List.

### .5.4.7.3.5 Party

Name of the Party that 'Owns' the List.

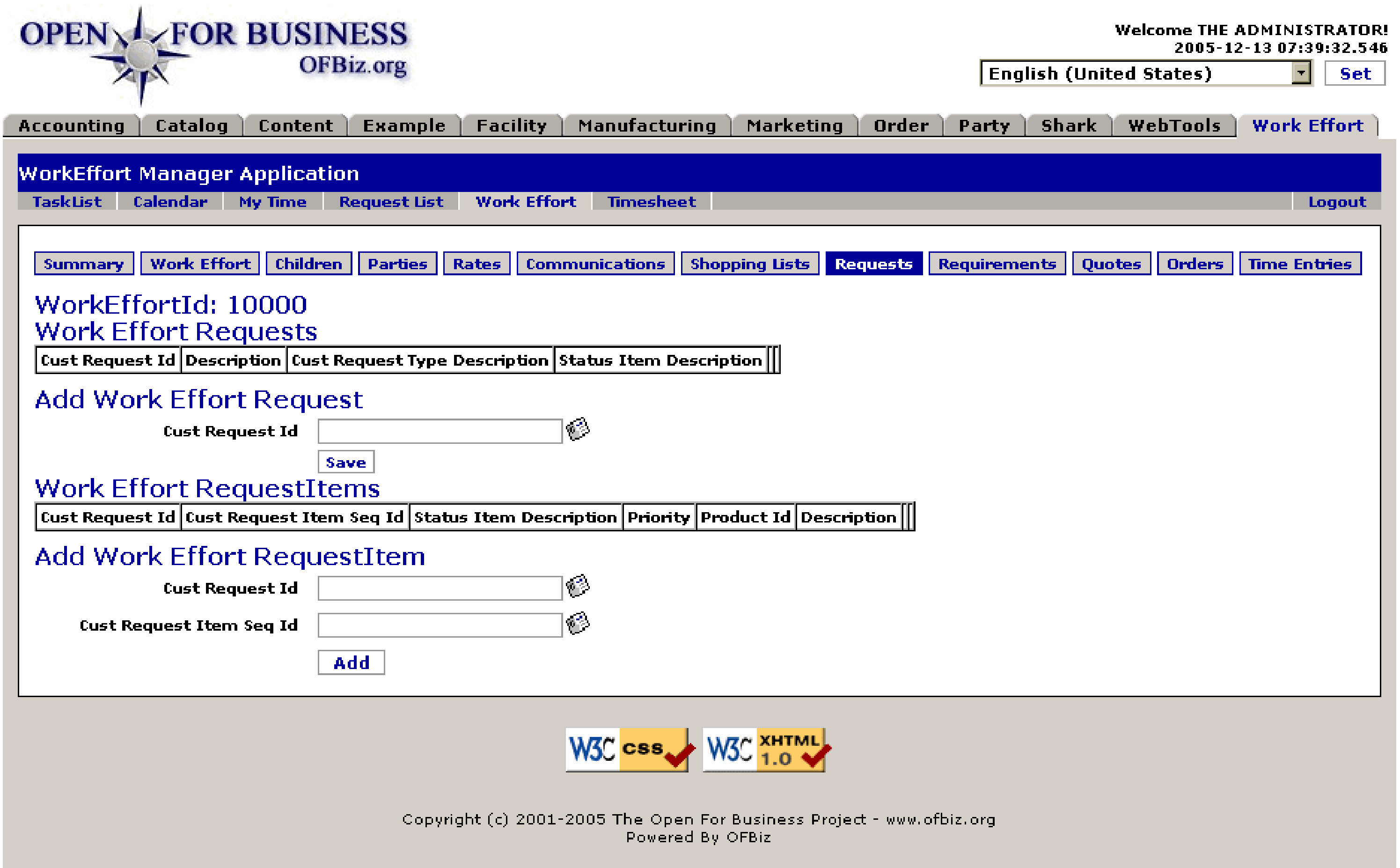
### .5.4.7.4 Tool to Add Work Effort Shopping List

### .5.4.7.4.1 Shopping List ID (popup search tool)

Enter the ID of the list and press [Add]. Use the popup search tool to locate the ID.

## .5.4.8 Requests

### .5.4.8.1 ListWorkEffortRequests




Requests related to the current Work Effort are listed or can be added here.

### .5.4.8.2 link buttons

[Save] [Delete] [Add] [Summary] [Work Effort] [Children] [Parties] [Rates] [Communications] [Shopping Lists] [Requests] [Requirements] [Quotes] [Orders] [Time Entries]

### .5.4.8.3 Table of Work Effort Requests

#### .5.4.8.3.1 Cust Request ID

Number assigned when the Customer Request was entered into the system. Click on this number to view or edit.

### .5.4.8.3.2 Description

The descriptive title of the Request.

### .5.4.8.3.3 Cust Request Type Description

What Type of Request this is.

### .5.4.8.3.4 Status Item Description

What is the Status of this Request? Entered, Approved, Processed, etc.

### .5.4.8.4 Tool to Add Work Effort Request

### .5.4.8.4.1 Cust Request ID (popup search tool)

Enter the Customer Request ID number then press [Save] to add it to the Work Effort.

### .5.4.8.5 Table of Work Effort Request Items

### .5.4.8.5.1 Cust Request ID

Number assigned when the Customer Request was entered into the system. Click on this number to view or edit.

### .5.4.8.5.2 Cust Request Item Seq ID

Within the Customer Request, there is likely a list of items needing attention. This Seq ID specifies which Item is being added to the Work Effort.

### .5.4.8.5.3 Status Item Description

What is the Status of this Item in processing the Request?

### .5.4.8.5.4 Priority

WHere does this effort rate in relation to other efforts? The Priority helps to allocate resources based upon relative importance.

### .5.4.8.5.5 Product ID

Which Product is the subject of this Request Item? The Product ID is given here.

### .5.4.8.5.6 Description

Which Product is the subject of this Request Item? The Product Description is given here.

### .5.4.8.6 Tool to Add Work Effort Request Item

### .5.4.8.6.1 Cust Request ID (popup search tool)

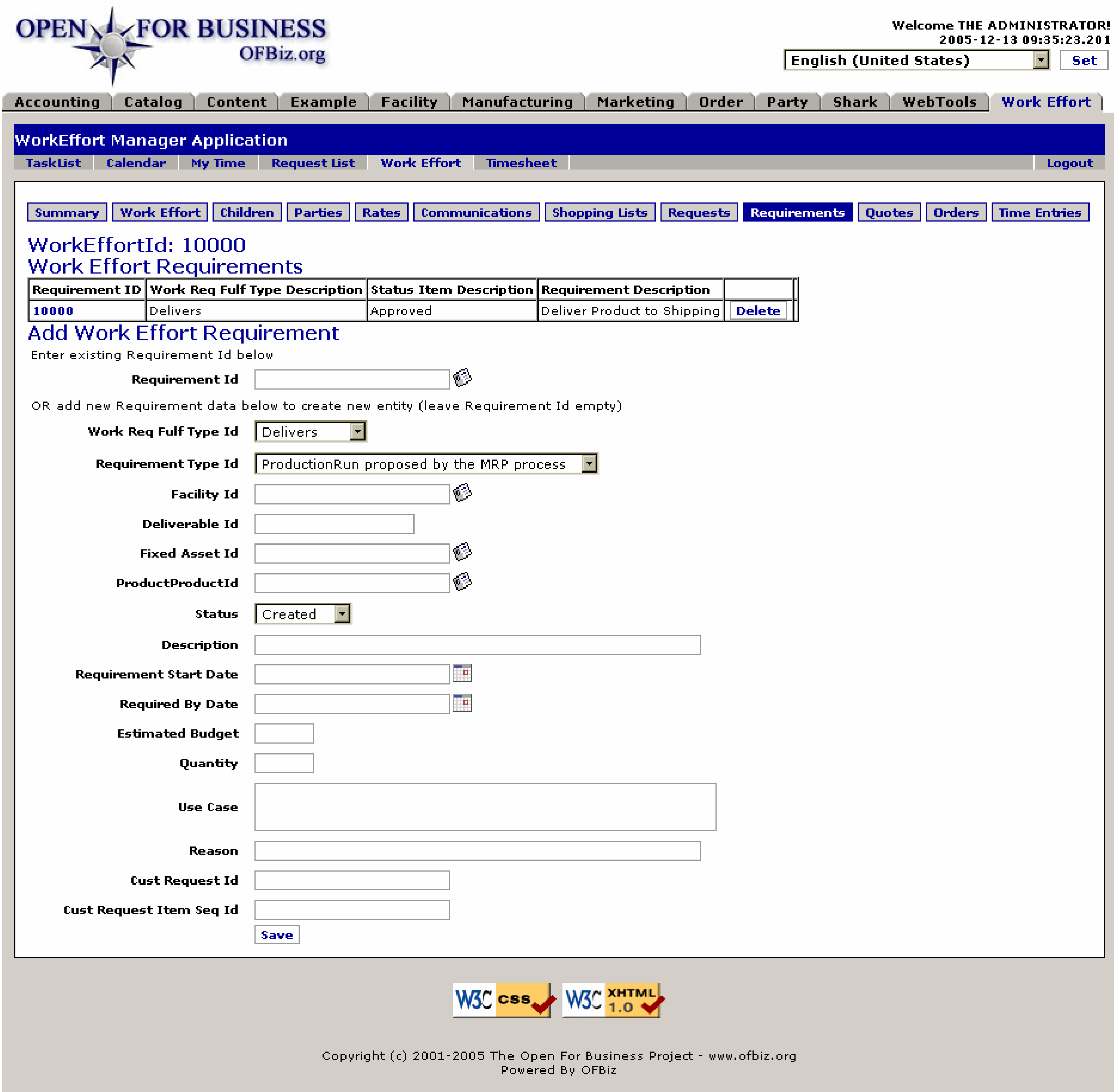
Specify the Request you wish to add to the Work Effort; use the popup search tool to identify the Request.

### .5.4.8.6.2 Cust Request Item Seq ID

Specify the Request Item Sequence item you wish to add to the Work Effort; use the popup search tool to identify the Item.

## .5.4.9 Requirements

### .5.4.9.1 ListWorkEffortRequirements




Work Effort Requirements are listed in the table and added with the tool shown here or under Order Manager - Requirements.

### .5.4.9.2 link buttons

[Save] [Delete] [Summary] [Work Effort] [Children] [Parties] [Rates] [Communications] [Shopping Lists] [Requests] [Requirements] [Quotes] [Orders] [Time Entries]

### .5.4.9.3 Table of Work Effort Requirements

#### .5.4.9.3.1 Requirement ID

Click on this number to view or edit the Requirement.

#### .5.4.9.3.2 Work Req Fulf Type Description

Fulfillment of this Requirement will accomplish one of the following purposes:

- Delivers
- Deploys
- Fixes
- Implements
- Tests

#### .5.4.9.3.3 Status Item Description

Describes the Status towards accomplishing this Requirement.

#### .5.4.9.3.4 Requirement Description

Describes what the Requirement is or does.

### .5.4.9.4 Tool to Add Work Effort Requirements

#### .5.4.9.4.1 Requirement ID (popup search tool)

Use the popup search tool to identify an existing Requirement to being into this Work Effort, then click on [Save] at the bottom of the screen.

### .5.4.9.4.2 Discussion

Except for Work Req Fulf Type ID, the remaining fields are each discussed under the Order Manager > Requirements tab. Please see that documentation for details.

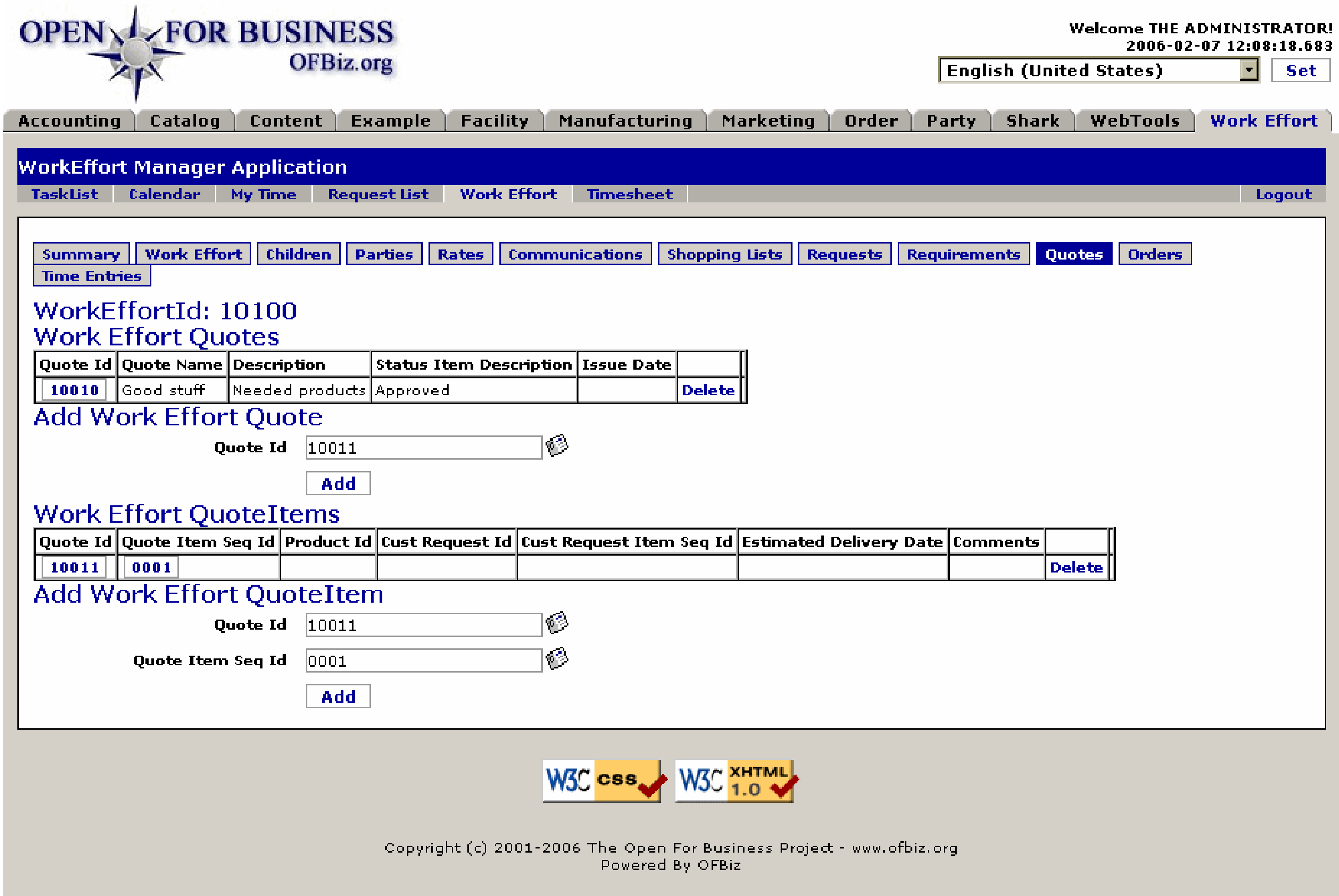
Work Req Fulf Type Description (drop-down box)

Fulfillment of this Requirement will accomplish one of the following purposes:

- Delivers
- Deploys
- Fixes
- Implements
- Tests

# .5.4.10 Quotes

## .5.4.10.1 ListWorkEffortQuotes




Quotes and Quote Items associated with the Work Effort are displayed and added from this screen.

## .5.4.10.2 link buttons

[Delete] [Add] [Summary] [Work Effort] [Children] [Parties] [Rates] [Communications] [Shopping Lists] [Requests] [Requirements] [Quotes] [Orders] [Time Entries]

### .5.4.10.3 Table of Work Effort Quotes

#### .5.4.10.3.1 Quote ID

The number assigned to identify this Quote at the time of its creation. Click on the ID to view or edit details.

#### .5.4.10.3.2 Quote Name

What the Quote is called.

#### .5.4.10.3.3 Description

Descriptive words about the quotation to differentiate it from other, similar quotes.

#### .5.4.10.3.4 Status Item Description

Actually the Status of this Quote throught the processes.

#### .5.4.10.3.5 Issue Date

The date when the Quote was issued.

### .5.4.10.4 Tool to Add Work Effort Quote

#### .5.4.10.4.1 Quote ID (popup search tool)

Enter the Quote ID then click on [Add] to include an existing Quote with this Work Effort.

### .5.4.10.5 Table of Work Effort Quote Items

#### .5.4.10.5.1 Quote ID

Click on this ID number to view or edit the Quote.

### .5.4.10.5.2 Quote Item Seq ID

Which Sequence Item within the Quotation has been added to this Work Effort.

### .5.4.10.5.3 Product ID

Which Product is listed in the Quotation Item.

### .5.4.10.5.4 Cust Request ID

Any associated Customer Request is given here.

### .5.4.10.5.5 Cust Request Item Seq Id

The related Customer Request Item Sequence ID number is given here.

### .5.4.10.5.6 Estimated Delivery Date

Any date provided for the estimated delivery is given here.

### .5.4.10.5.7 Comments

Comments included with the Quote Item is given here.

### .5.4.10.6 Tool to Add Work Effort Quote Items

### .5.4.10.6.1 Quote ID (popup search tool)

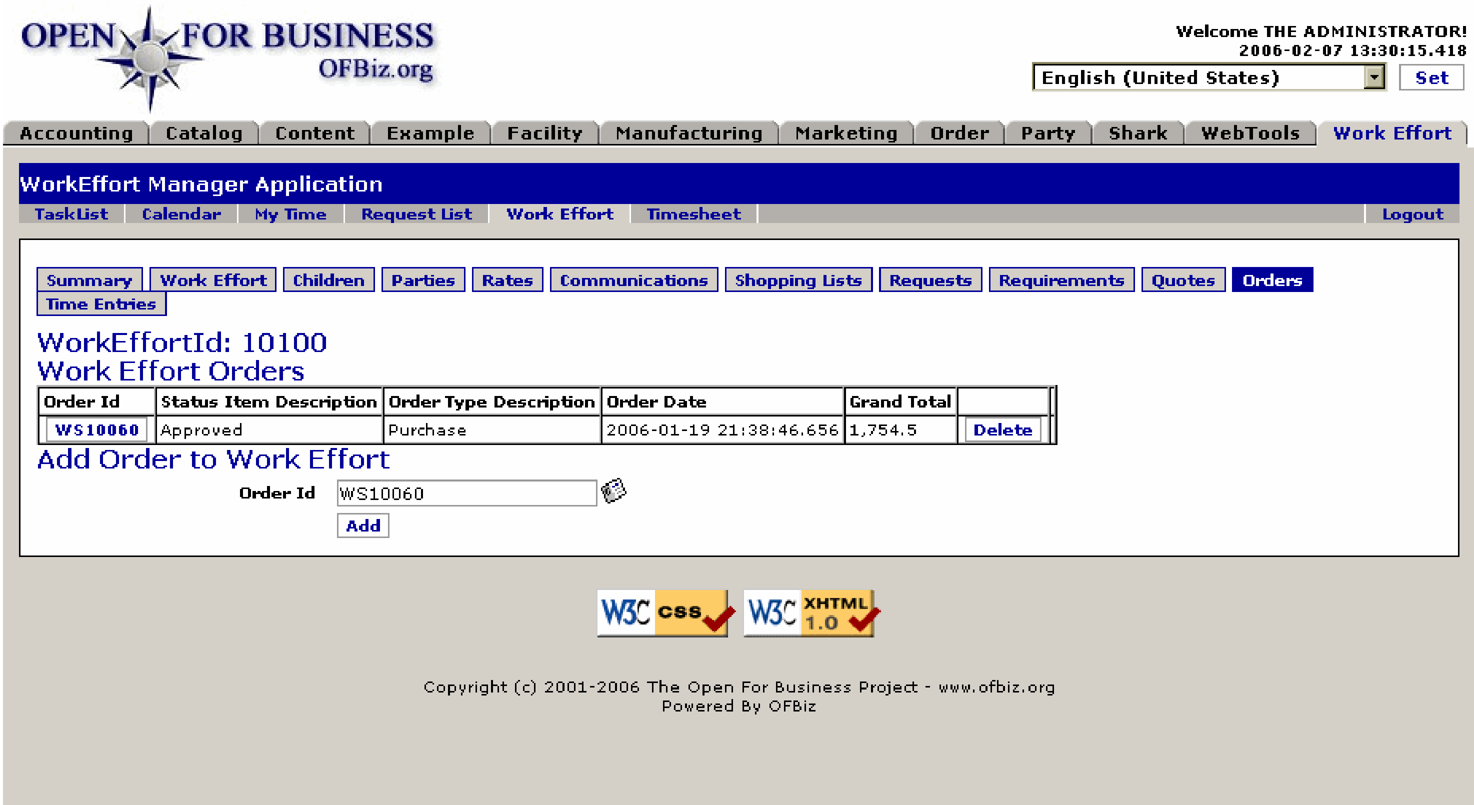
Before you can specify a Quote Item, you must first find the Quote. Enter that here, than proceed to the Quote Item Sequence ID field next.

### .5.4.10.6.2 Quote Item Seq ID (popup search tool)

Enter the Sequence ID (use the popup search tool if needed), then click on [Add].

# .5.4.11 Orders

## .5.4.11.1 ListWorkEffortOrderHeaders




Any Order associated with the Work Effort can be listed here. Use the tool to associate other Orders.

## .5.4.11.2 link buttons

[Delete] [Add] [Summary] [Work Effort] [Children] [Parties] [Rates] [Communications] [Shopping Lists] [Requests] [Requirements] [Quotes] [Orders] [Time Entries]

## .5.4.11.3 Table of Work Effort Orders

### .5.4.11.3.1 Order ID

Click on the Order ID number to view or edit the Order under the Order Manager.

### .5.4.11.3.2 Status Item Description

The current Status of the order.

### .5.4.11.3.3 Order Type Description

Is this a Sales Order or a Purchase Order?

### .5.4.11.3.4 Order Date

When the Order was placed.

### .5.4.11.3.5 Grand Total

The total value of the Order.

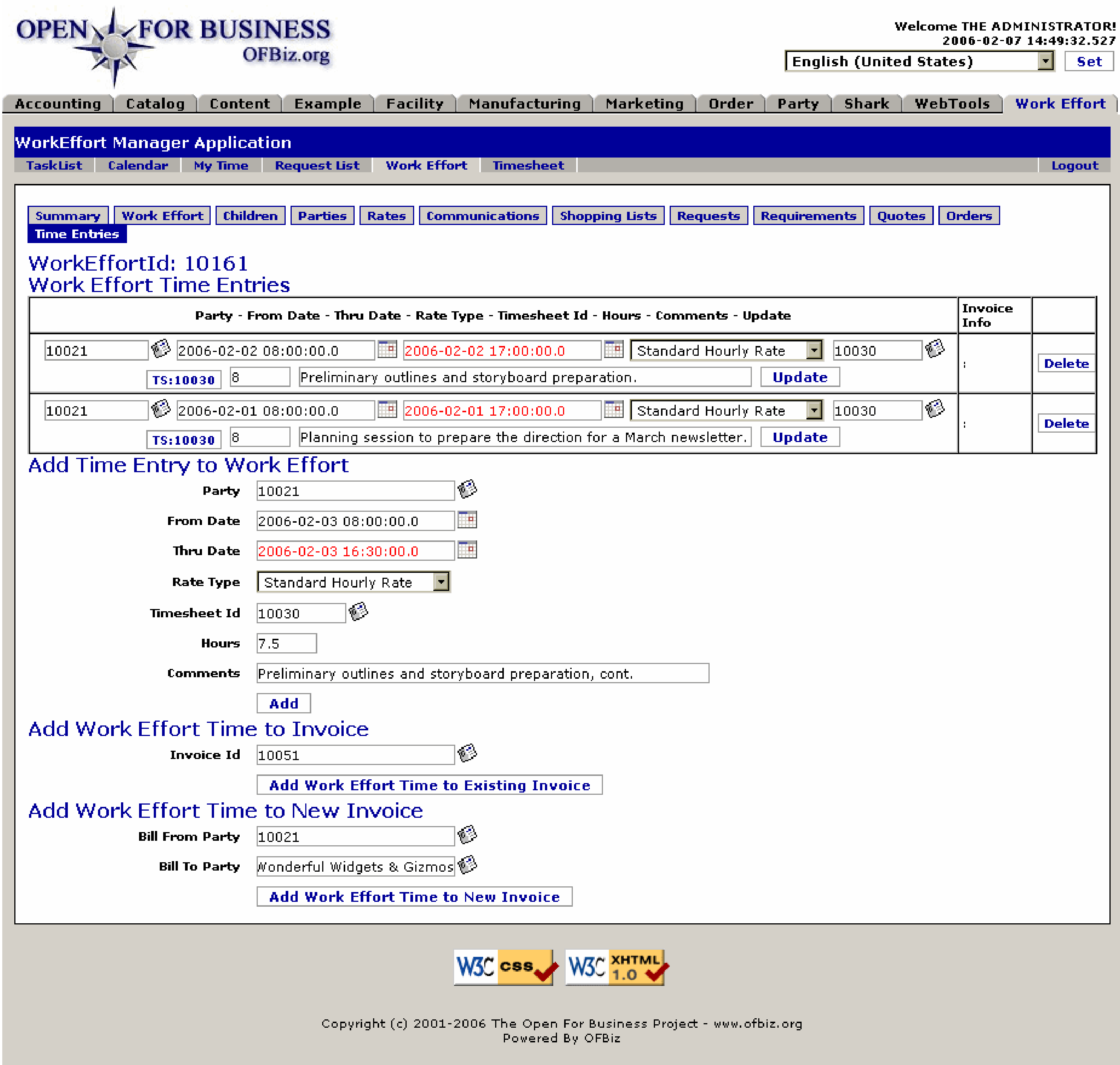
### .5.4.11.4 Tool to Add Order to Work Effort

### .5.4.11.4.1 Order ID (popup search tool)

Specify the Order ID number, then click [Add].

## .5.4.12 Time Entries

### .5.4.12.1 EditWorkEffortTimeEntries




Review previous Timesheet Entries and make new Entries against the selected Work Effort at this powerful screen.

### .5.4.12.2 link buttons

[Update] [Delete] [Add] [Add Work Effort Time to Existing Invoice] [Add Work Effort Time to New Invoice] [Summary] [Work Effort] [Children] [Parties] [Rates] [Communications] [Shopping Lists] [Requests] [Requirements] [Quotes] [Orders] [Time Entries]

### .5.4.12.3 Table of Time Entries

#### .5.4.12.3.1 Party (popup search tool)

See the same field below, under Add Time Entry to Work Effort, for a discussion about this field.

#### .5.4.12.3.2 From Date (popup calendar)

See the same field below, under Add Time Entry to Work Effort, for a discussion about this field.

#### .5.4.12.3.3 Thru Date (popup calendar)

See the same field below, under Add Time Entry to Work Effort, for a discussion about this field.

#### .5.4.12.3.4 Rate Type (drop-down box)

See the same field below, under Add Time Entry to Work Effort, for a discussion about this field.

#### .5.4.12.3.5 Timesheet ID (popup search tool)

See the same field below, under Add Time Entry to Work Effort, for a discussion about this field.

#### .5.4.12.3.6 Hours

See the same field below, under Add Time Entry to Work Effort, for a discussion about this field.

#### .5.4.12.3.7 Comments

See the same field below, under Add Time Entry to Work Effort, for a discussion about this field.

## .5.4.12.4 Tool to Add Time Entry to Work Effort

### .5.4.12.4.1 Party (popup search tool)

Enter the Party ID here; use the popup search tool if needed.

### .5.4.12.4.2 From Date (popup calendar)

Enter the Date AND TIME the work effort was actually begun. You will probably need to modify the time entry, keeping it in the format 12:34:56.0, generally in a 24-hour clock style.

### .5.4.12.4.3 Thru Date (popup calendar)

Enter the Date AND TIME the work effort was actually FINISHED. You will probably need to modify the time entry, keeping it in the format 12:34:56.0, generally in a 24-hour clock style.

### .5.4.12.4.4 Rate Type (drop-down list)

Choose from Standard, Discounted, and Overtime hourly rates.

### .5.4.12.4.5 Timesheet ID (popup search tool)

This was created under the Timesheet Tab > Create Timesheet screen. Enter the number here or find with the popup search tool.

### .5.4.12.4.6 Hours

Hours represent more than just the difference between the starting time and the finishing time. The worker might have multiple time sheets, doing some of the work on this one, then spending time on another. She might have had to stop work for a while to take care of a personal matter. Enter only the chargeable time here. Double billing is not acceptable.

### .5.4.12.4.7 Comments

Any information needed to help Timekeeping staff or management to clearly understand the entry should be added here.

### .5.4.12.5 Tool to Add Work Effort Time to Invoice

#### .5.4.12.5.1 Invoice ID (popup search tool)

Enter the Invoice ID number (use the popup search tool if needed), then click the link [Add Work Effort Time to Existing Invoice].

### .5.4.12.6 Tool to Add Work Effort Time to New Invoice

#### .5.4.12.6.1 Bill From Party (popup search tool)

Enter the ID of the Party doing the billing. In most instances, this would be your Company or one of its subsidiaries. If work was performed by a contracted employee, this could be that employee billing your company. Then click on the link [Add Work Effort Time to New Invoice].

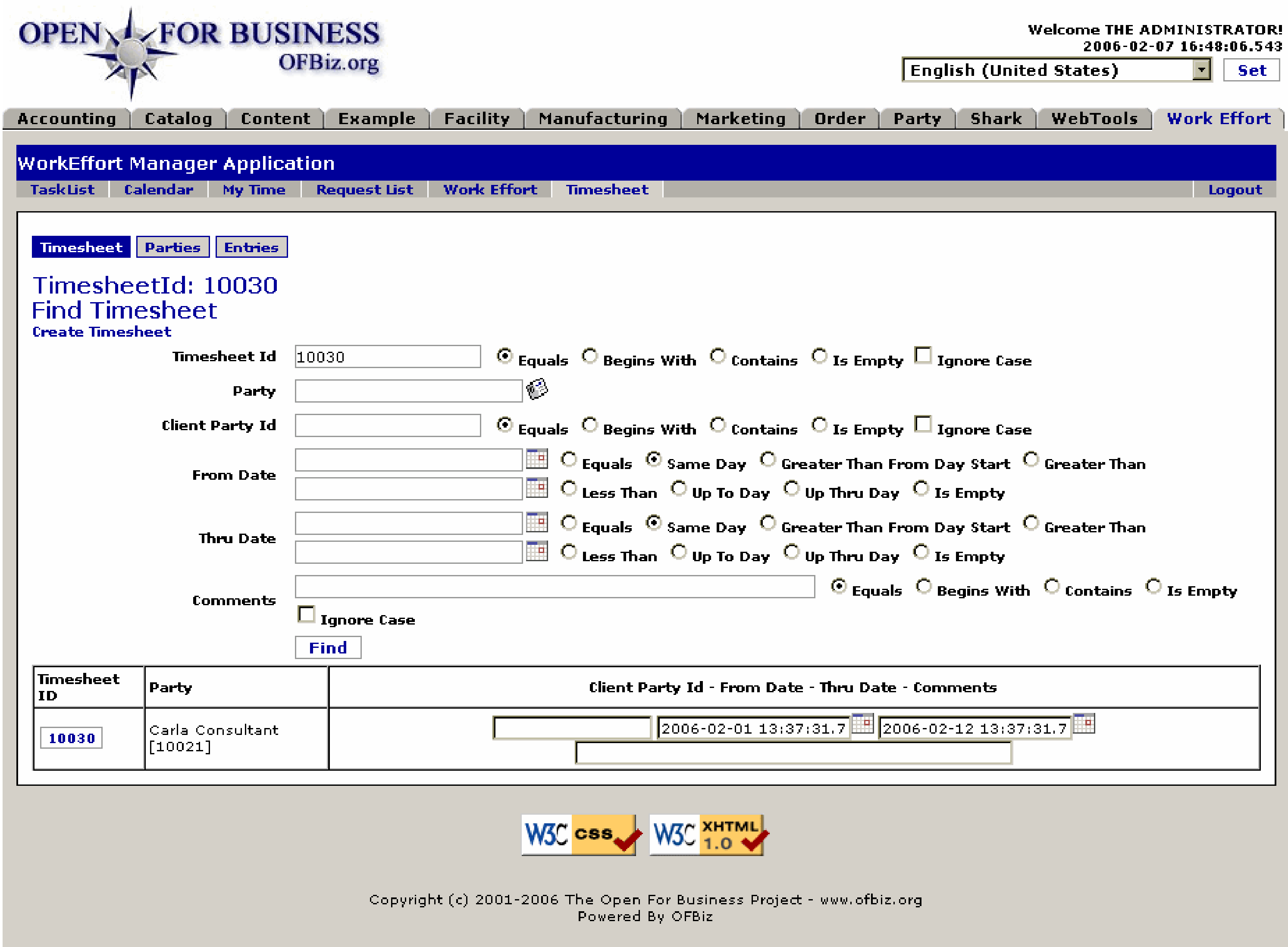
#### .5.4.12.6.2 Bill To Party (popup search tool)

This is the Party that will receive the Invoice. Enter the ID or use the popup search tool. Then click on the link [Add Work Effort Time to New Invoice].

# .6 Time Sheet

## .6.1 Find Timesheet

### .6.1.1 FindTimesheet




Enter parameters at the top; found Timesheets will be presented in the table.

### .6.1.2 link buttons

[Create Timesheet] [Find] [Timesheet] [Party] [Entries]

## .6.1.3 Timesheet ID

What you are looking for. If you know this number, enter here, select the Equals radio button, and the Find button will bring it up. You may enter a partial number combined with the appropriate radio buttons for a search.

## .6.1.4 Party (popup search tool)

To search for all the Timesheets current for a particular Party, enter the Party ID here with the Equals radio button selected. If not sure of the Party ID, use the popup search tool.

## .6.1.5 Client Party ID

If the TimeSheet you seek relates to work for a Contractor, or a project has been assigned to the employee related to a Work Order from another Party, enter that Client ID here.

## .6.1.6 From Date (popup calendars)

If you know the exact starting date for the TimeSheet, enter it here. For example, if the Party has multiple TimeSheets, but you only want the one starting today, enter that date.

If you are searching for a timesheet within a range of dates, enter the oldest likely date in the top calendar and select a radio button other than Equals; then in the lower From calendar, select a radio other than Is Empty. Mirror that action with the Thru Date calendars.

## .6.1.7 Thru Date (popup calendars)

If you know the ending date for the TimeSheet you seek, enter that in the top calendar and use radio button Equals.

Use the procedure discussed with From Date to bracket the date.

## .6.1.8 Comments

If you know what may have been written in the Comments section, search on that using the appropriate radio button.

## .6.1.9 Table of found timesheets

### .6.1.9.1 Timesheet ID

Click on this number to View or Edit the timesheet.

### .6.1.9.2 Party ID

The Party assigned this Timesheet.

### .6.1.9.3 Client Party ID

If the TimeSheet relates to work for a Contractor, or a project has been assigned to the employee related to a Work Order from another Party, this is their ID.

### .6.1.9.4 From Date

When the work begins.

### .6.1.9.5 Thru Date

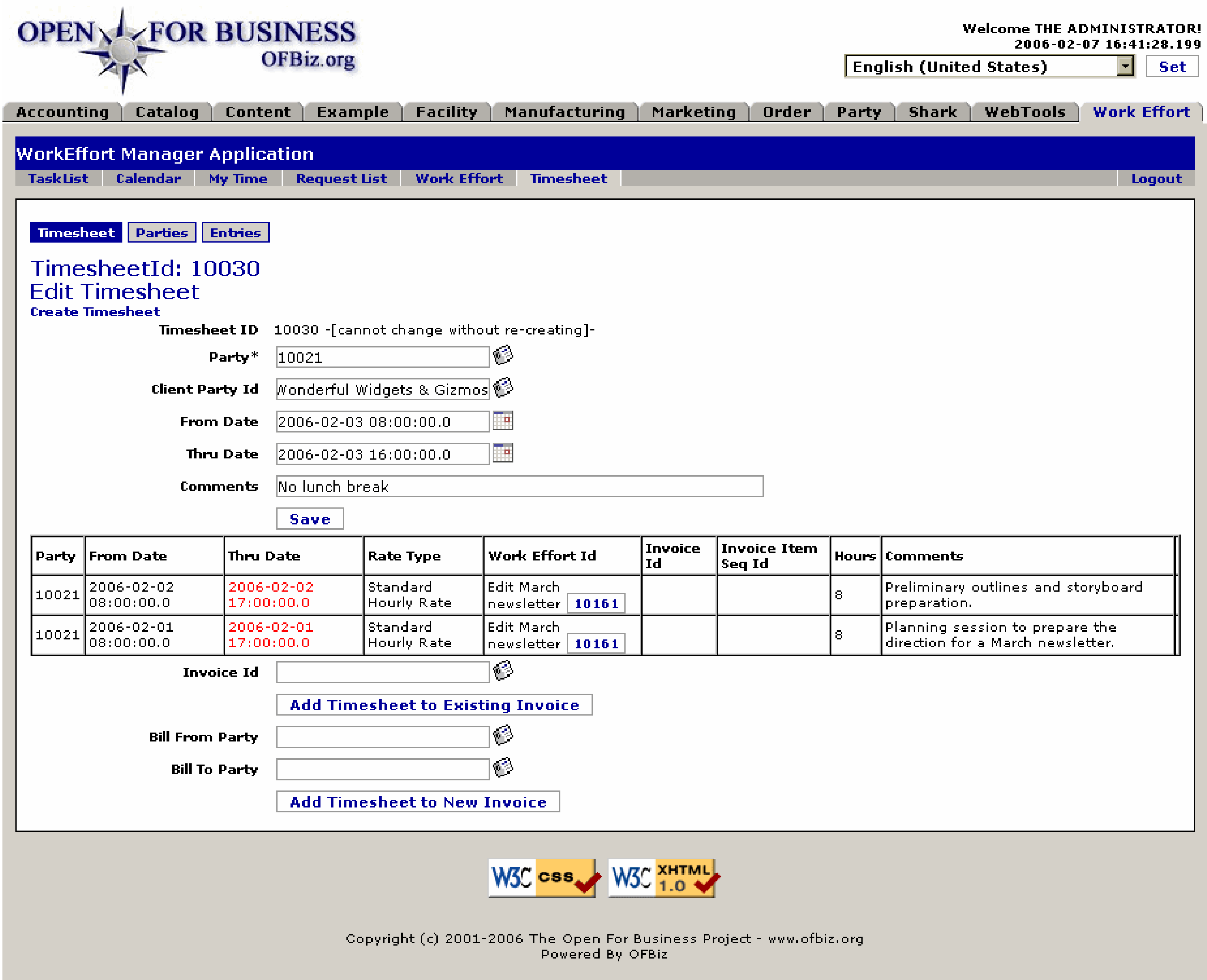
When the work ends.

### .6.1.9.6 Comments

Additional information pertinent to the timesheet might be found here.

## .6.2 Edit Timesheet

### .6.2.1 EditTimesheet-existing




Anything that needs to be done with a Timesheet can be done here or at the other two tabs which follow.

### .6.2.2 link buttons

[Create Timesheet] [Save] [Add Timesheet to Existing Invoice] [Add Timesheet to New Invoice] [Timesheet] [Parties] [Entries]

### .6.2.3 Timesheet ID

This is the one you are editing; it cannot be changed.

### .6.2.4 Party * (popup search tool)

The person whose time is or will be recorded on the Timesheet. This is a required field. Use the popup search tool if needed to locate the Party ID.

### .6.2.5 Client Party ID (popup search tool)

If the work is being performed under a contract to a customer, or if the project needs to be tracked back to a customer's purchase, this is where you tie the two together.

### .6.2.6 From Date (popup calendar)

The beginning of the period covered by this Timesheet. You will need to manually edit the elements, maintaining the YYYY-MM-DD HH:MM:SS.0 format whether or not you use the popup calendar.

### .6.2.7 Thru Date (popup calendar)

End of the period covered by this Timesheet. You will need to manually edit the elements, maintaining the YYYY-MM-DD HH:MM:SS.0 format whether or not you use the popup calendar.

### .6.2.8 Comments

Any additional information needed to process this timesheet. For example, is this an overtime period? Was there non-productive time covered by this period, i.e., a general office meeting or training?

### .6.2.9 Summary Timesheet table

#### .6.2.9.1 Party

The ID for the Party whose Timesheet we are looking at.

### .6.2.9.2 From Date

The beginning of the period covered by this Timesheet. To make changes in this field, use the Entries sub-tab.

### .6.2.9.3 Thru Date

The end of the period covered by this Timesheet. Note that if this is highlighted in color, the period has past. To make changes in this field, use the Entries sub-tab.

### .6.2.9.4 Rate Type

Standard, Discounted, or Overtime Hourly rates are indicated here. To make changes in this field, use the Entries sub-tab.

### .6.2.9.5 Work Effort ID

A Timesheet is typically generated off a Work Effort ID; this column identifies that. Click on the ID to view or edit the Work Effort.

### .6.2.9.6 Invoice ID

When the work is charged back to a customer, the Invoice ID is indicated here. See the tool below this table for assigning work to an Invoice.

### .6.2.9.7 Invoice Item Seq ID

Within the Invoice there may be several Items listed; this identifies which of those Items the time is being charged against.

### .6.2.9.8 Hours

How many hours are being charged against this time period for this Work Effort ID and Invoice ID. Use the Entries tab to enter time for this Timesheet.

### .6.2.9.9 Comments

Any additional information needed to process this timesheet. For example, is this an overtime period? Was there non-productive time covered by this period, i.e., a general office meeting or training?

### .6.2.10 Invoice ID (popup search tool)

Enter the ID for the customer's Invoice here, then click on the link [Add Timesheet to Existing Invoice]. Use the popup search tool to find the Invoice Id, if needed.

### .6.2.11 Bill From Party (popup search tool)

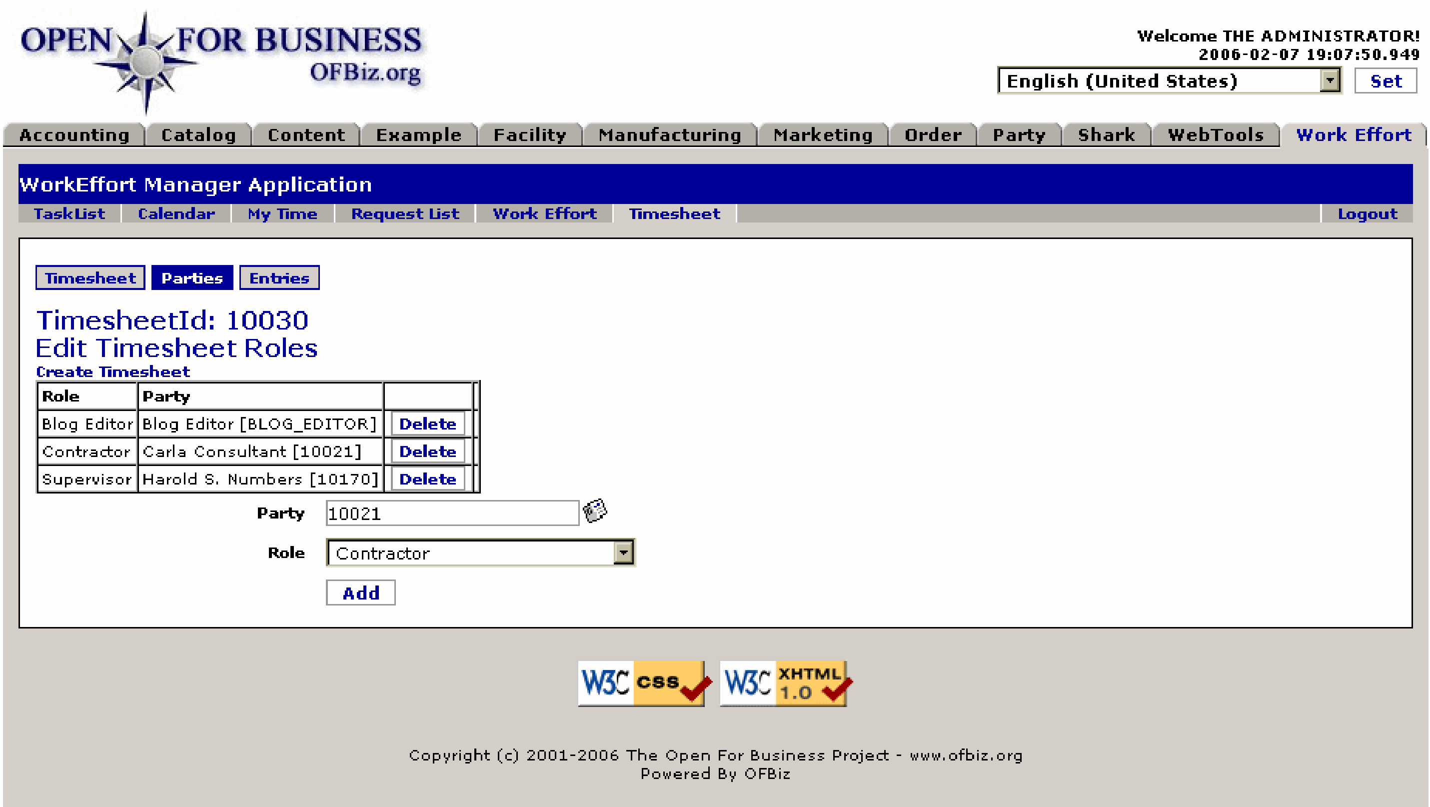
Your company may have several different entities; indicate which Party Group the customer is being charged from.Or, this may from a Contractor/Consultant working directly for you; this would be their Party Id here.

### .6.2.12 Bill To Party (popup search tool)

This would be the customer or the customer's agent who will be receiving the Invoice. Or, if being charged for time worked by a Consultant, this would be your Company name here. To create a new Invoice, click the link [Add Timesheet to New Invoice].

## .6.3 Parties

### .6.3.1 EditTimesheetRoles




What Role is the Timesheet Owner playing in this Timesheet? What other Parties are involved and what are their Roles?

### .6.3.2 link buttons

[Create Timesheet] [Add] [Delete] [Timesheet] [Parties] [Entries]

### .6.3.3 Table of existing Roles

#### .6.3.3.1 Role

The assigned Role for this Party.

#### .6.3.3.2 Party

A Party with a relationship to this Timesheet assigned to the Role.

## .6.3.4 Tool to assign Party and Role

### .6.3.4.1 Party (popup search tool)

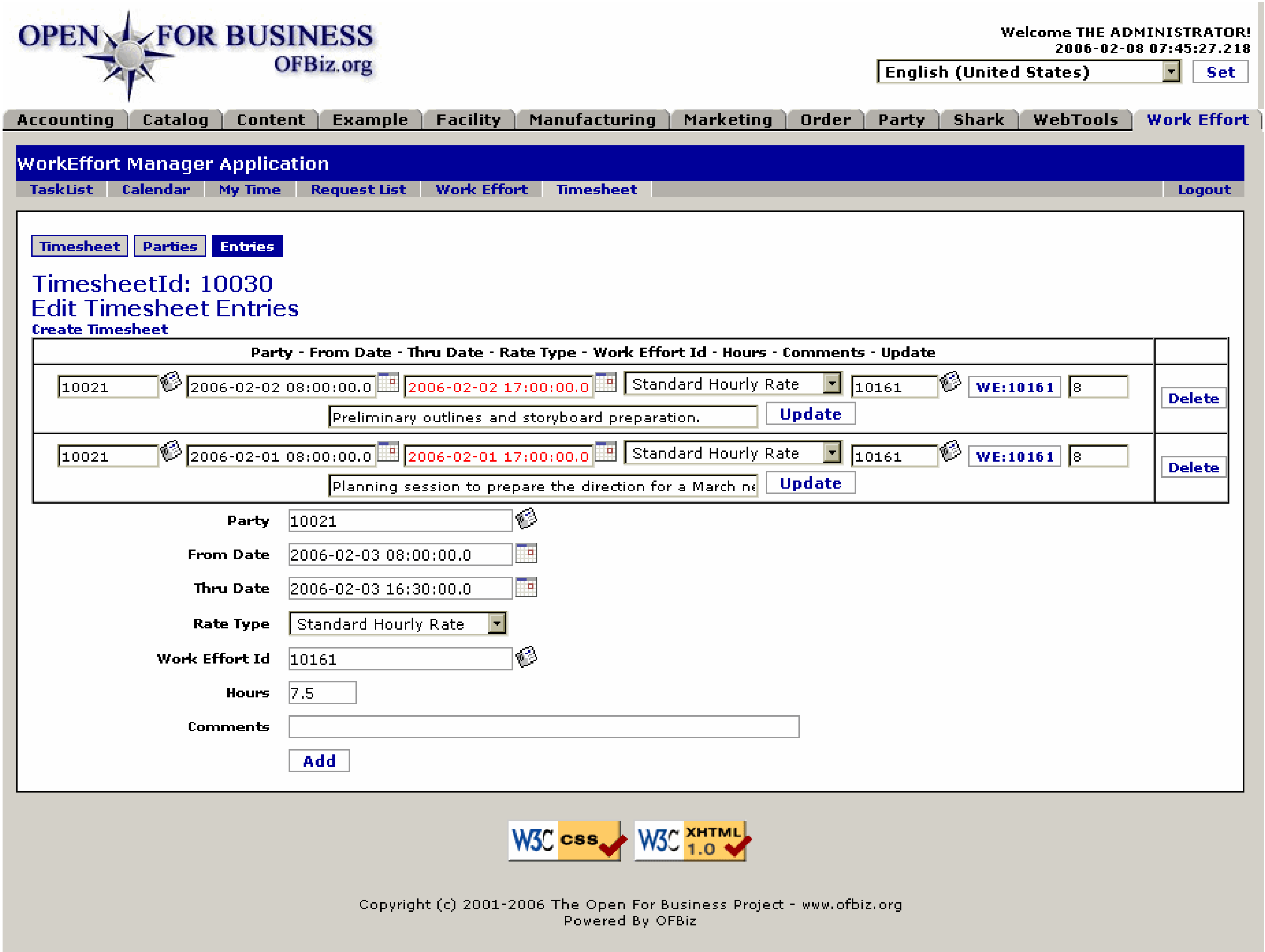
Enter the Party ID of the Party being added to this Timesheet.

### .6.3.4.2 Role (drop-down box)

Select the Role performed by this Party in relation to this Timesheet. Remember that no Role can be assigned which has not been established for this Party at the Party Manager > Roles tab.

## .6.4 Entries

### .6.4.1 createTimeSheetEntry




After an initial entry is made, you may return to add other entries with the time entry tool.

### .6.4.2 link buttons

[Create Time Sheet] [Update] [Delete] [Add] [Timesheet] [Parties] [Entries]

## .6.4.3 Table of Timesheet Entries

### .6.4.3.1 Party (popup search tool)

You can change the Party ID at this point if needed.

### .6.4.3.2 From Date (popup calendar)

If the starting day or time needs adjusting, do it here.

### .6.4.3.3 Thru Date (popup calendar)

If the ending date or time needs adjusting, do it here.

### .6.4.3.4 Rate Type (drop-down box)

Select from Standard, Overtime, or Discounted Hourly Rate.

### .6.4.3.5 Work Effort ID

Shows the Work Effort item which drives this Timesheet. Click on this link to edit or review the item.

### .6.4.3.6 Hours

Record the actual hours and tenths (such as 6.25 for 6 hours and 15 minutes).

### .6.4.3.7 Comments

Whatever additional information is needed to make the timesheet meaningful to those who will process it or review it.

## .6.4.4 Party (popup search tool)

The Party performing the effort which is being recorded on the Timesheet.

### .6.4.5 From Date (popup calendar)

Beginning date AND TIME of the work effort being recorded.

### .6.4.6 Thru Date (popup calendar)

Ending date AND TIME for the work effort being recorded here.

### .6.4.7 Rate Type

This would generally be either the Standard, Discounted or Overtime Hourly Rate.

### .6.4.8 Work Effort ID (popup search tool)

This would be the Work Effort item which drives this Timesheet.

### .6.4.9 Hours

Record the actual hours and tenths (such as 6.25 for 6 hours and 15 minutes).

### .6.4.10 Comments

Whatever additional information may be useful to those processing or reviewing this Timesheet.

# Chapter 12: Manufacturing Manager

## .1 Job Shop

### .1.1 Discussion - Production Runs and Tasks

A Production Run is composed of Production Run Tasks that are performed one after the other. When the last Production Run Task is completed, the Production Run can be closed.

A Production Run is done in a Facility; its start date is equal to the start date of the first of its Production Run Tasks; its end date equals the end date of the last of its Production Run Tasks.

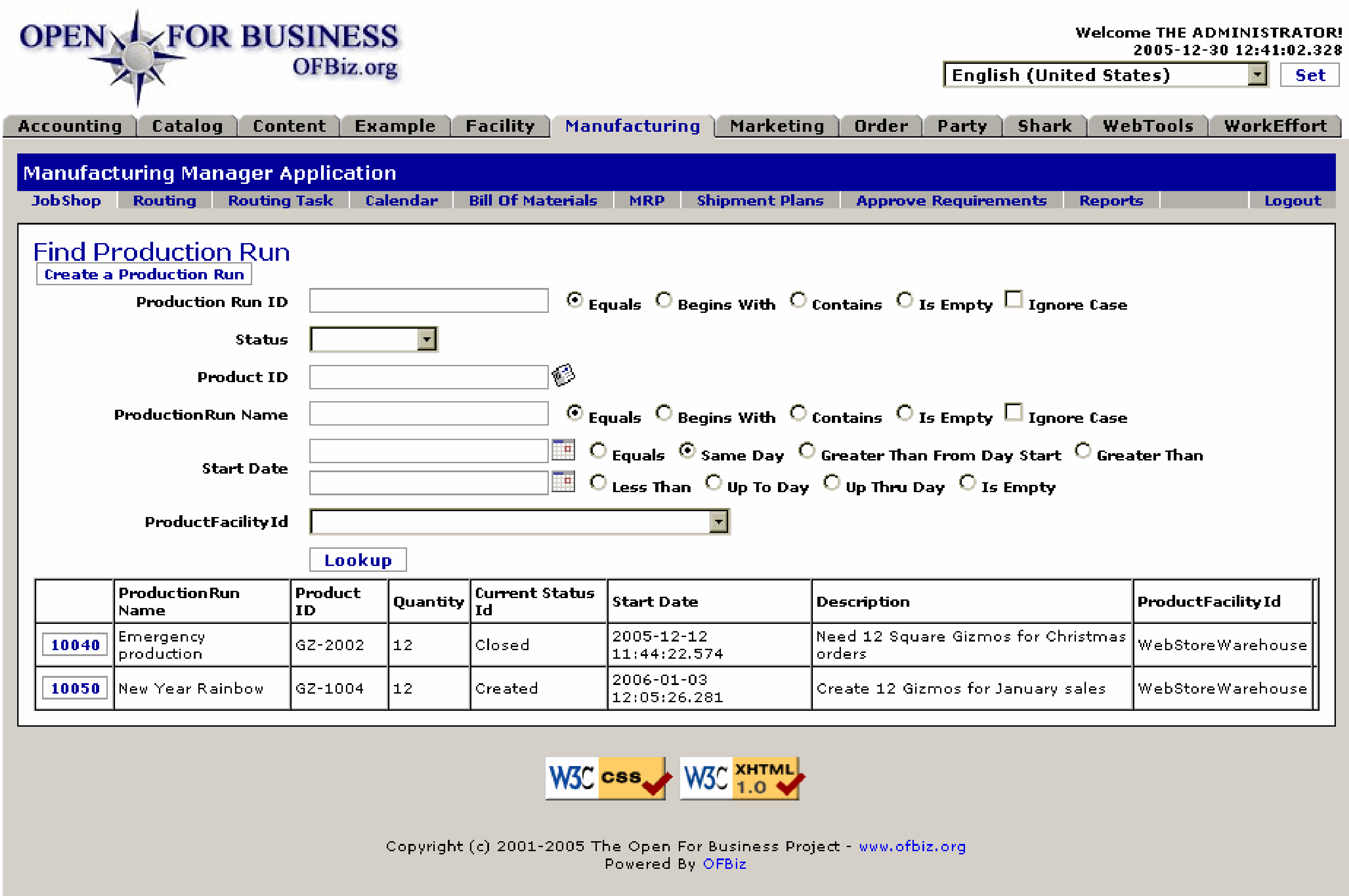
Each Production Run Task is performed in a fixed asset (also called a workcenter).

You can see all these events in the WorkEffort's calendar pages. Select a Facility and you will see all the Production Runs that will take place in that Facility. Select a Fixed Asset and you will see all the Production Run Tasks that will take place in the Fixed Asset.

For further discussion of Production Runs and the Manufacturing process, see under Shipment Plans, below.

## .1.2 Find Production Run

### .1.2.1 FindProductionRun




The first screen under the Manufacturing application. Find a production run or choose another tab.

### .1.2.2 link buttons

[Create a Production Run] [Lookup]

### .1.2.3 Search tool

#### .1.2.3.1 Production Run ID

Enter known parts of the ID, then select an appropriate radio button: Equals / Begins With / Contains / Is Empty.

Check the box to disregard the UPPER or lower Case of the entry.

## .1.2.3.2 Status (drop-down box)

By invoking a status parameter in the search, you will be excluding all Production Runs that are not of that status.

Therefore, this should not be used unless you are very sure of the status.

Possible Status from the drop-down box includes:

- Created
- Confirmed
- Running
- Completed
- Closed
- Cancelled

## .1.2.3.3 Product ID (popup search box)

Either enter the Product ID or use the search popup to specify which Product the Production Run was to include.

## .1.2.3.4 ProductionRun Name

Enter known parts of the name, then select an appropriate radio button: Equals / Begins With / Contains / Is Empty.

Check the Ignore Case box to prevent incorrect case entry from skewing the search.

## .1.2.3.5 Start Date (popup calendars)

### .1.2.3.5.1 (First date)

Enter a date with the popup calendar, then select an appropriate radio button: Equals / Same Day / Greater Than From Day Start / Greater Than.

### .1.2.3.5.2 (Second date)

Enter a date with the popup calendar, then select an appropriate radio button: Less Than / Up To Day / Up Thru Day / Is Empty.

### .1.2.3.6 Product Facility ID (drop-down box)

Use the drop-down box to identify which Facility is involved, if there is more than one facility which could be used for production runs.

## .1.2.4 Table Production Runs

### .1.2.4.1 (production run ID)

Click on the ID number to view or edit the Production Run.

### .1.2.4.2 ProductionRun Name

What the Production Run was named at the time it was created.

### .1.2.4.3 Product ID

Which Product is being produced in the Production Run.

### .1.2.4.4 Quantity

How many will be produced.

### .1.2.4.5 Current Status ID

Possible Status conditions might be:

- Created
- Confirmed
- Running
- Completed
- Closed
- Cancelled

### .1.2.4.6 Start Date

When the Production Run is scheduled to begin.

## .1.2.4.7 Description

What the Production Run is intended to accomplish.

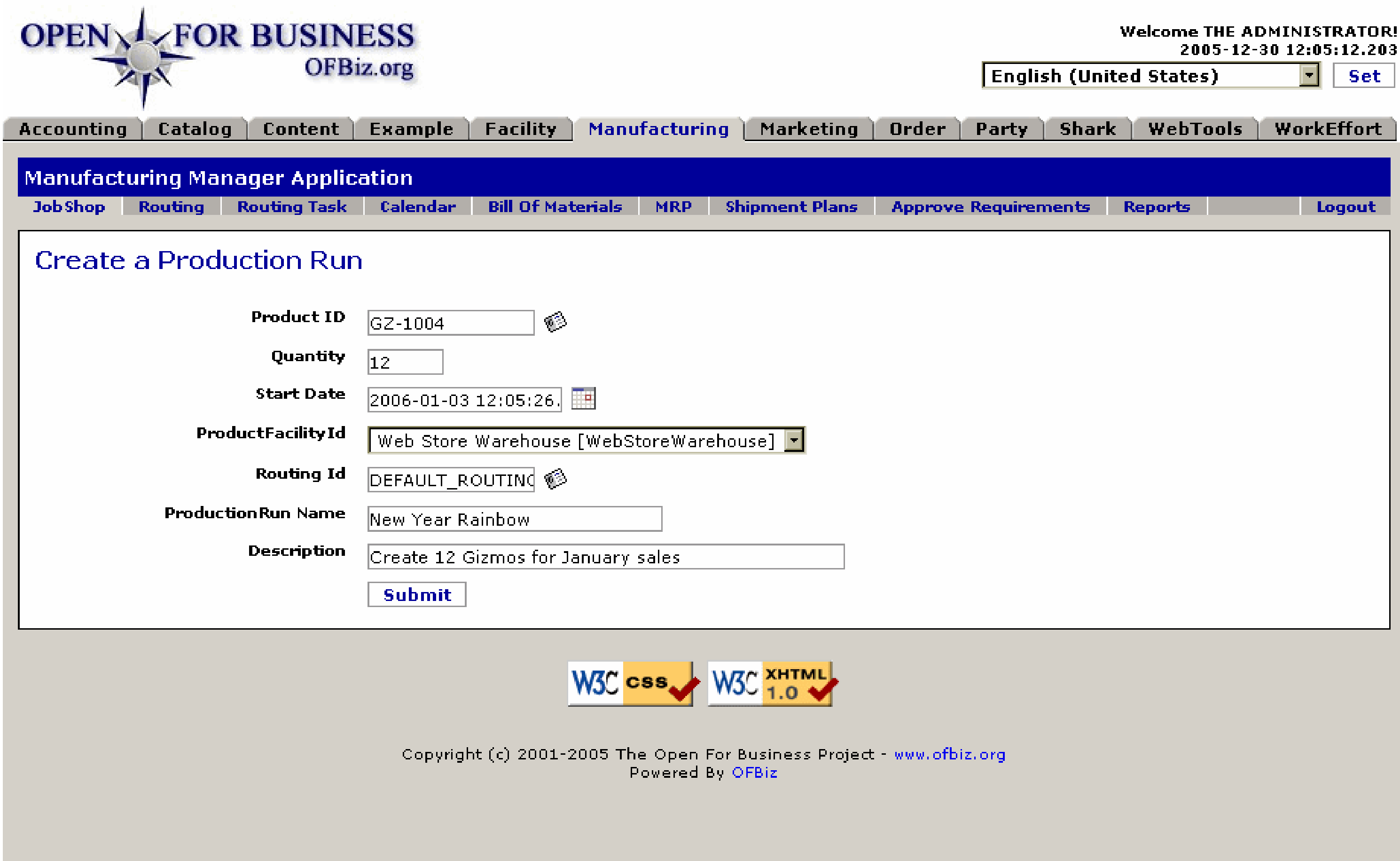
Manager Reference: Manufacturing

## .1.2.4.8 Product Facility ID

Which Facility will be performing the Production Run.

# .1.3 Create a Production Run

## .1.3.1 CreateProductionRun




Only these 7 items of information are needed to create a production run; add details in the next screen.

### .1.3.2 link buttons

[Submit]

### .1.3.3 Product ID (popup search box)

Enter the Product ID to be produced; use the popup search tool to identify the product, if needed.

### .1.3.4 Quantity

How many are to be produced.

### .1.3.5 Start Date (popup calendar)

When the Production Run is to begin.

### .1.3.6 Product Facility ID (drop-down box)

Which Facility will be performing the production? Use the drop-down box to identify.

Manager Reference: Manufacturing

### .1.3.7 Routing ID (popup search box)

The Routing ID to be followed with this Production Run. Use the popup search box to identify it.

### .1.3.8 ProductionRun Name

Give the Production Run a descriptive name to distinguish it from any other.

### .1.3.9 Description

Here you can elaborate on the Production Run Name and give more details about the purpose or reason for this Production Run.

## .1.4 Edit Production Run

### .1.4.1 ShowProductionRun


Make changes or additions to an existing Production Run from this screen. Confirm, Complete, Close or Cancel as needed.

### .1.4.2 link buttons

[Update] [Edit] [Delete] [Create a Production Run] [Edit Production Run] [Assocs] [Confirm] [Quick Complete] [Quick Close] [Cancel] [Add a Routing Task] [Add Product Component to Production Run]

## .1.4.3 Production Run details

### .1.4.3.1 Product ID

Cannot change without creating a new Production Run.

### .1.4.3.2 ProductFacility ID (drop-down box)

Where, or in which facility, will the production be accomplished.

### .1.4.3.3 Quantity

How many products are going to be produced.

### .1.4.3.4 Start Date (popup calendar)

Use popup calendar to change.

### .1.4.3.5 Calculated Completion Date

When the Production should be finished. This cannot be edited because it is calculated using information from many sources, using an algorithm to derive the estimation. It assumes starting exactly when the start date shows, so you must be accurate to the time entered under Start Date.

#### .1.4.3.5.1 Calculated Completion Date - a discussion

There is an algorithm that computes the time needed to complete the task, for every task in the production run, in the following way:

totalTaskTime = setupTime + taskTime * neededQuantity

where:

- setupTime and taskTime are set in the Routing Task definition
- neededQuantity is the quantity you enter when you create the production run.

Then, the total estimated time needed to complete the production run is the sum of all the totalTaskTimes of its tasks.

If the Estimated Completion Date is EQUAL to the start date it might be because you have not set the setupTime or taskTime.

About start and end dates: the above algorithm only computes the time needed to run tasks (and the whole production run as well); to set the estimated start/end dates there is another algorithm that, for every task:

- goes to the fixed asset to which the task is assigned
- takes the calendar assigned to the fixed asset
- based on the capacity of the calendar and on the start date, it computes an end date.

For example:

- I have a fixed asset, 'painting workcenter', associated with the standard calendar.
- The calendar states that the asset is available from 8:00 to 18:00 from Monday thru Friday.
- I have a production run with two tasks, 'paint' and 'test, both assigned to the 'painting workcenter'
- the start date is 17:00 Friday, December 16th.

Let's say that the first algorithm (based on qty, setup and task time) has determined that:

a) for the first task, 'paint', the time needed will be 2 hours

b) for the second task, 'test', the time needed will be 1 hour

The result is that:

A) paint task:

A1) Start date is 17:00 Friday, December 16.

A2) End date is 9:00 Monday, December 19.

B) test task:

B1) Start date is 9:00 Monday, December 19.

B2) End date is 10:00 Monday, December 19.

C) Entire production run:

C1) Start date i17:00 Friday, December 16.

C2) End date is 10:00 Monday, December (which is the estimated completion date you should see after you have created a production run if all the parameters exist).

When you change the start date (after you have created the production run) all the tasks' start/end dates are recomputed and this will change the estimated completion date of the production run as well.

### .1.4.3.6 Production Run Name

What this Production Run will be called. This field may be edited at this screen.

### .1.4.3.7 Description

General details or information about the Production Run. This field may be edited at this screen.

## .1.4.4 List Of ProductionRun RoutingTasks

### .1.4.4.1 Sequence Number

Sequencing will progress from the smallest through the largest number.

### .1.4.4.2 Routing Task Name

What the Routing Task is known as.

### .1.4.4.3 Fixed Asset

If a Fixed Asset is needed to accomplish the Routing Task, it is identified here.

### .1.4.4.4 Start Date (popup calendar)

When the work will begin.

### .1.4.4.5 Calculated Completion Date

When the work is calculated to be finished.

### .1.4.4.6 Estimated Setup Time

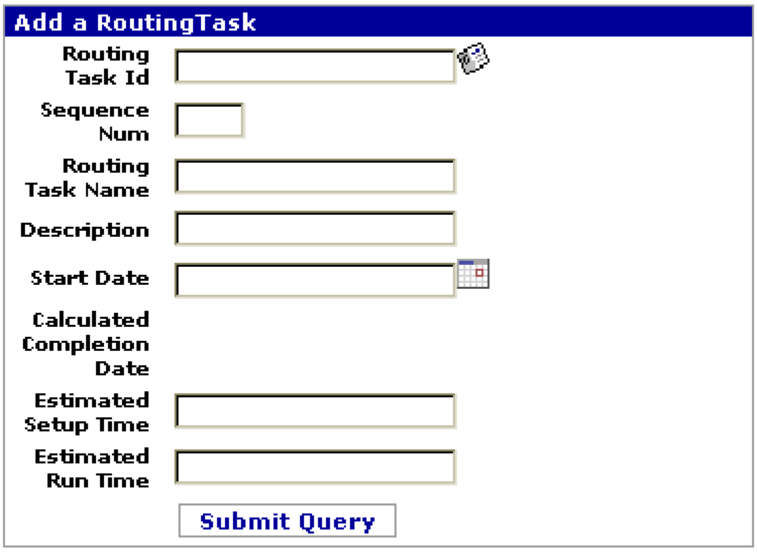
Expressed in milli-seconds, approximately how long it will take to setup material, equipment and personnel to accomplish this routing task for the production run.

### .1.4.4.7 Estimated Run Time

Expressed in milli-seconds.

### .1.4.4.8 Add a Routing Task

#### .1.4.4.8.1 EditProductionRun-AddRoutingTask




This working section pops into the screen above; complete it by pressing [Submit Query] and the new Task appears in the table.

#### .1.4.4.8.2 link buttons

[Submit Query]

#### .1.4.4.8.3 Routing Task ID (popup search box)

Use popup search box to specify which Routing Task is being added here.

#### .1.4.4.8.4 Sequence Num

Sequencing will progress from the smallest through the largest number.

#### .1.4.4.8.5 Routing Task Name

What the Routing Task is known as.

#### .1.4.4.8.6 Description

Describe the nature of work accomplished by this Routing Task.

#### .1.4.4.8.7 Start Date (popup calendar)

When the work will begin.

#### .1.4.4.8.8 Calculated Completion Date

When the system calculates the Routing Task will be complete. This field cannot be edited. If empty, that is because no data exists upon which the system can calculate the Completion Date.

#### .1.4.4.8.9 Estimated Setup Time

Expressed in milli-seconds, approximately how long it will take to setup material, equipment and personnel to accomplish this routing task for the production run.

#### .1.4.4.8.10 Estimated Run Time

Enter amount in milli-seconds.

## .1.4.5 List Of ProductionRun Components

### .1.4.5.1 Routing Task ID

Name and [ID] of the Routing Task. Use the [Edit] link at the end of the row to view or modify the Routing Task.

### .1.4.5.2 Product Name

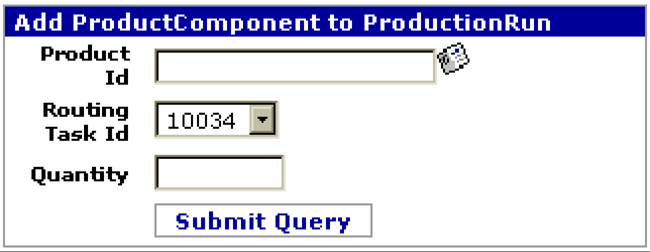
The Product being added to the Production Run Routing Task.

### .1.4.5.3 Quantity

How many.

### .1.4.5.4 Tool to Add ProductComponent to ProductionRun

#### .1.4.5.4.1 EditProductionRun-addProductComponent




Use popin to add Product Component.

#### .1.4.5.4.2 link buttons

[Submit Query]

#### .1.4.5.4.3 Product ID (popup search)

Select the ID using the popup search tool.

#### .1.4.5.4.4 Routing Task ID (drop-down box)

Select the Routing Task from the drop-down box.

#### .1.4.5.4.5 Quantity

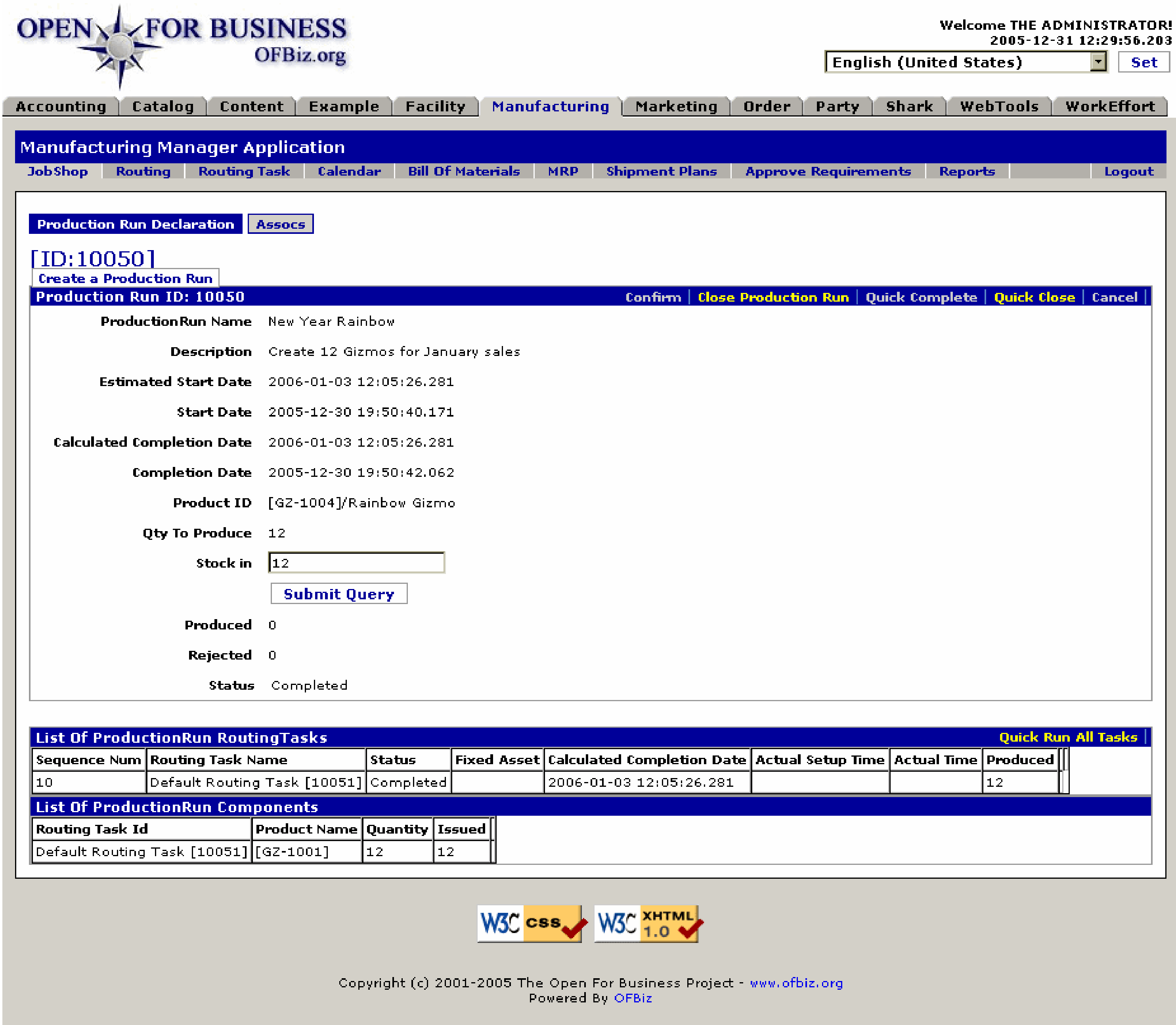
How many will be added.

## .1.5 Status Report

### .1.5.1 Discussion

When the Production Run has been completed, estimated items are changed to actual amounts. The screen changes as shown below.

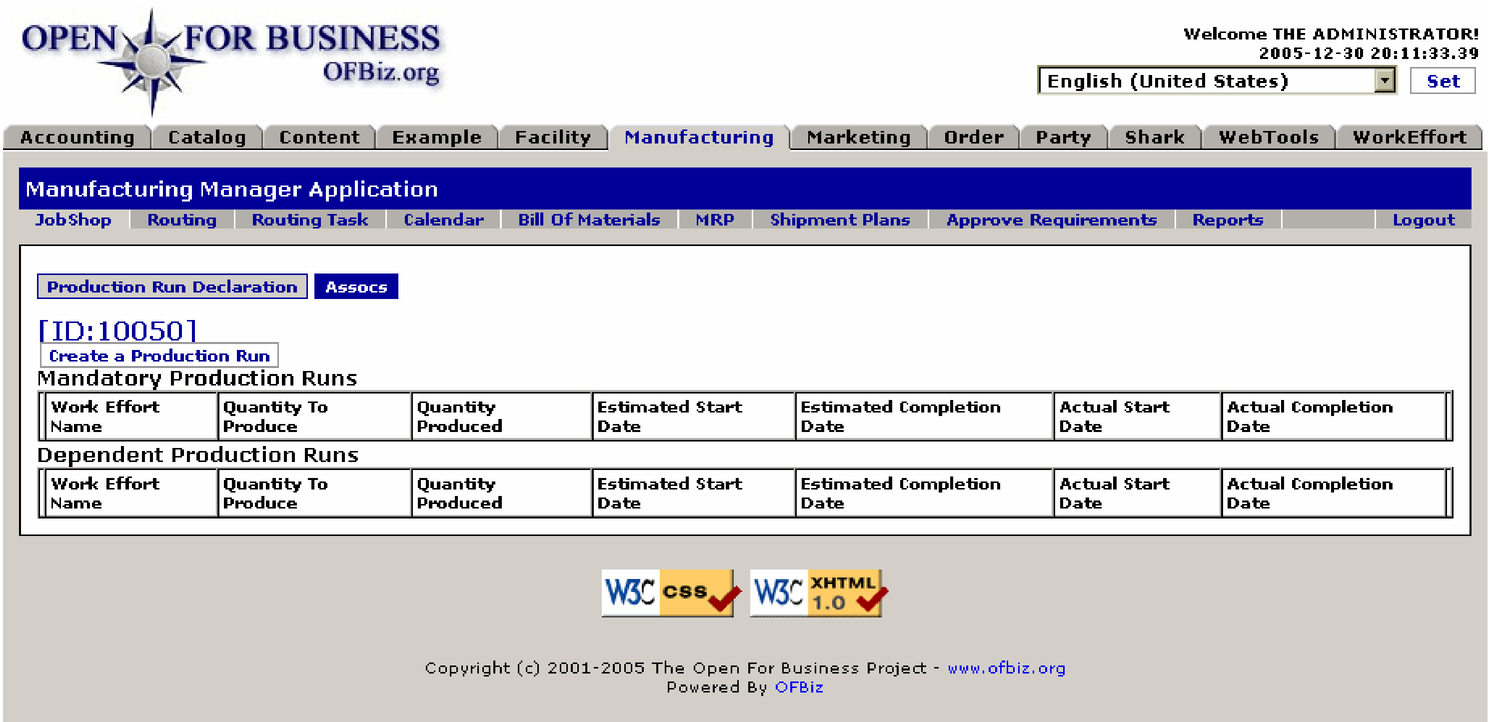
## .1.5.2 quickChangeProductionRunStatus




Report screen after the Production Run is completed.

## .1.6 Assocs

### .1.6.1 ProductionRunAssocs




When other Production Runs are associated with this one, either Mandatory or Dependent, they are reported here.

### .1.6.2 link buttons

[Create Production Run] [Production Run Declaration] [Assocs]

### .1.6.3 Mandatory Production Runs

#### .1.6.3.1 (Production Run ID)

Click on the ID number in this first column to edit or view the Mandatory Production Run.

#### .1.6.3.2 Work Effort Name

The name by which the Production Run is known.

### .1.6.3.3 Quantity to Produce

Total amount expected from this Production Run.

### .1.6.3.4 Quantity Produced

If the Production Run is completed, how many were actually produced.

### .1.6.3.5 Estimated Start Date

When the Production when is or was expected to begin.

### .1.6.3.6 Estimated Completion Date

When the Production Run is expected to be completed.

### .1.6.3.7 Actual Start Date

If the Production Run has been completed, when did it actually begin.

### .1.6.3.8 Actual Completion Date

If the Production Run is completed, when was it actually finished.

## .1.6.4 Dependent Production Runs

### .1.6.4.1 Discussion of the fields

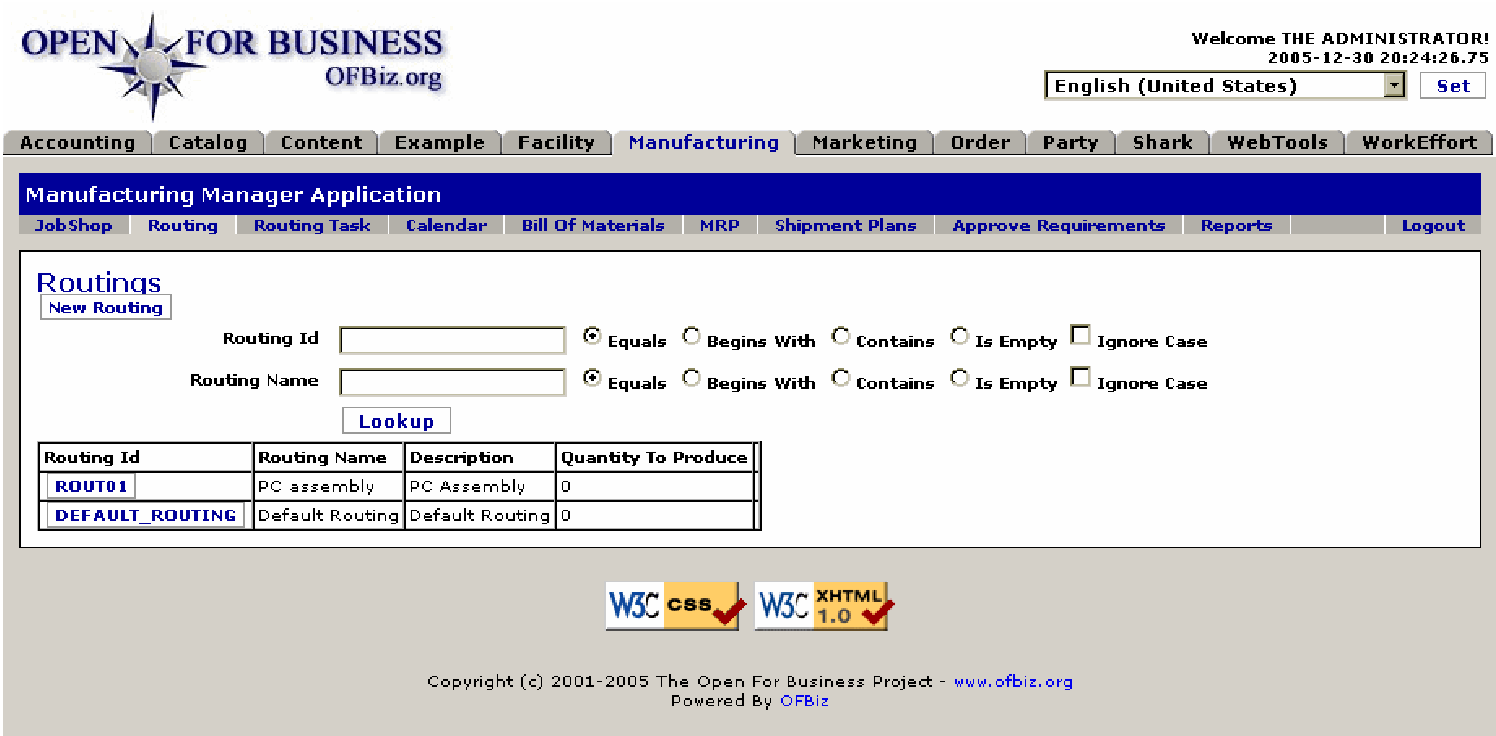
Each of the fields is identical with the Mandatory Production Run fields, discussed above.

# .2 Routing

## .2.1 Find a Routing

Click on the Work Effort ID to go to the Edit Routing screen; there you can see details or make changes to the Routing.

## .2.1.1 FindRouting




Search for an established Routing. Search tool results limit the returns in the table.

## .2.1.2 link buttons

[New Routing] [Lookup]

## .2.1.3 Search tool

### .2.1.3.1 Routing ID

Enter known data and select the applicable radio button:

- Equals
- Begins With
- Contains
- Is
- Empty

To have the search ignore the UPPER or lower case of the entry, check the box.

### .2.1.3.2 Routing Name

Enter known data and select the applicable radio button:

- Equals
- Begins With
- Contains
- Is
- Empty

To have the search ignore the UPPER or lower case of the entry, check the box.

## .2.1.4 Table of current Routings

### .2.1.4.1 Routing ID

Click on the Routing ID to be taken to an edit screen for viewing or editing the Routing.

### .2.1.4.2 Routing Name

The common name for this Routing.

### .2.1.4.3 Description

Brief description of what the Routing is supposed to accomplish.

### .2.1.4.4 Quantity To Produce

How many are expected to be produced with this Routing.

## .2.2 Create New Routing

### .2.2.1 EditRouting-New


A new Routing is initiated and named at this screen.

### .2.2.2 link buttons

[New Routing] [Submit]

### .2.2.3 Routing Name

What you choose to call the Routing. Should be concise yet clear.

### .2.2.4 Description

What the Routing is intended to accomplish. Keep it short.

### .2.2.5 Quantity To Produce

How many items will be produced.

# .2.3 Edit Routing

Same screen used to create a New Routing except that existing fields are populated and the processing tabs are shown.

## .2.3.1 EditRouting


You can change anything except the Routing ID.

## .2.3.2 link buttons

[New Routing] [Submit] [Edit Routing] [Edit Routing Product Link] [Edit Routing Task Assoc]

## .2.3.3 Routing Name

What you call this Routing.

## .2.3.4 Description

What the Routing is expected to do.

## .2.3.5 Quantity To Produce

How many will be produced.

# .2.4 Edit Routing Task Assoc

## .2.4.1 EditRoutingTaskAssoc


Routing Tasks are associated with the Routing from this screen. Existing associations can be deleted.

## .2.4.2 link buttons

[Add a existing Routing Task] [Copy a routingTask and Add it] [Delete] [Edit Routing] [Edit Routing Task Assoc] [Edit Routing Product Link]

## .2.4.3 Tool to add Routing Task

### .2.4.3.1 Routing Task ID (popup search box)

Identify the Task with the popup search tool.

### .2.4.3.2 Sequence Number

When the tasks need to be sequenced, indicate the appropriate Sequence Number here.

### .2.4.3.3 From Date (popup calendar)

This would be the creation date of the Task association with this Routing. Default is Now. Use the popup calendar to indicate a different date and time.

### .2.4.3.4 Thru Date (popup calendar)

This would be the expiration date of the Task association with this Routing, if any. Use the popup calendar to specify the date and time.

## .2.4.4 Table of associated tasks

The displayed Setup Time and Running Time are actually introduced under the Routing Task tab. Click on the Routing Task name to be taken into the Edit Routing Task window for that Task.

### .2.4.4.1 Routing Task Name

What the Routing Task is called.

### .2.4.4.2 Sequence Num

If tasks are sequenced, this is the number assigned to this task.

### .2.4.4.3 From Date

When this Task was associated with the Routing.

### .2.4.4.4 Thru Date

If the association of this Task with the Routing is to expire, this is the anticipated expiration date and time.

### .2.4.4.5 Estimated Setup Time

How long (in milliseconds) it is estimated to take to setup this Task.

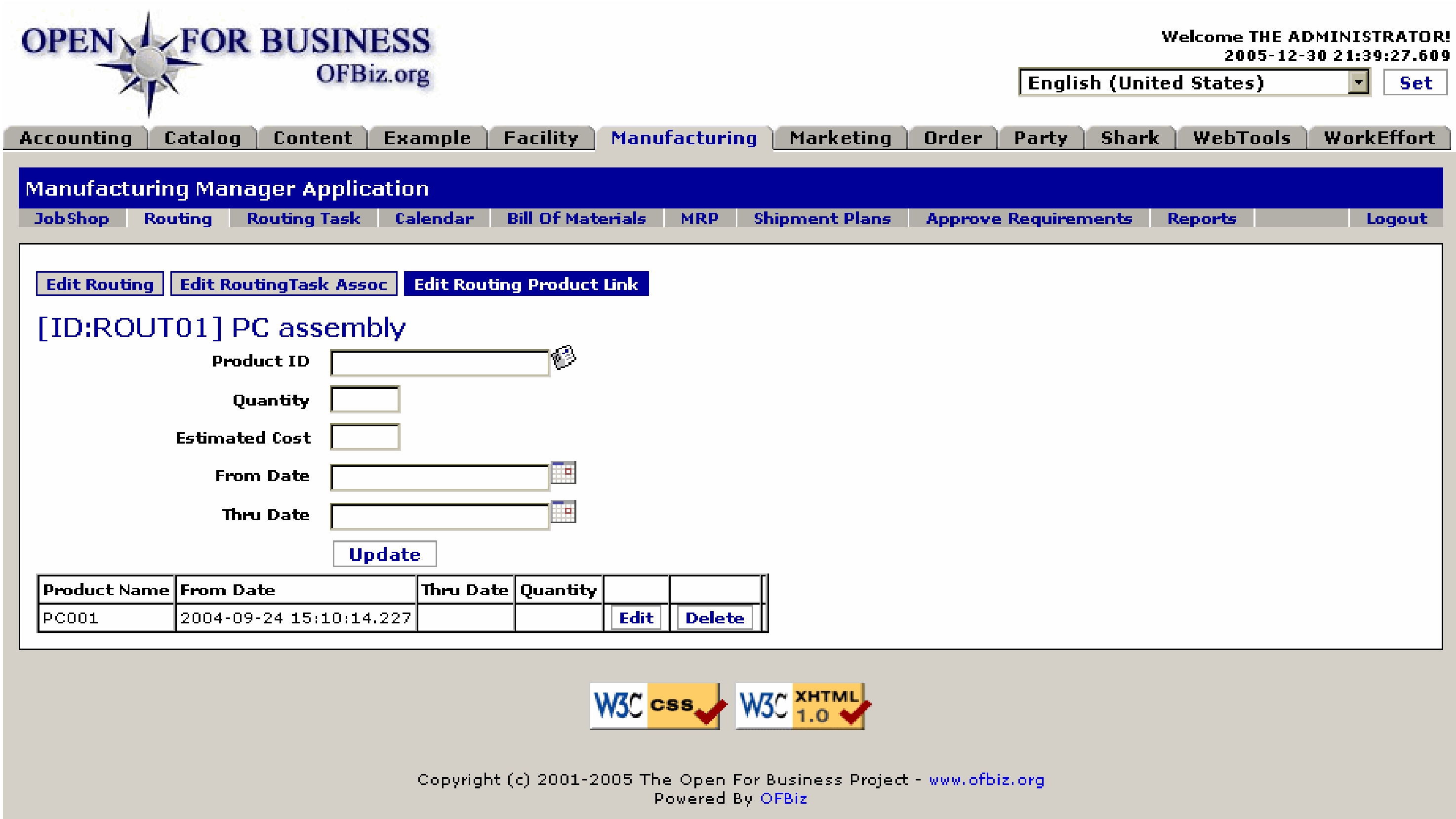
### .2.4.4.6 Estimated Run Time

Approximately how long the Task will take to accomplish, expressed in milliseconds.

## .2.5 Edit Routing Product Link

To edit an existing Routing Link, click on the item in the table. The editing fields will populate with data for you to edit.

### .2.5.1 EditRoutingProductLink




Associate the related Product ID with the Routing; indicate Quantity, Cost and schedule.

### .2.5.2 link buttons

[Update] [Edit] [Delete] [Edit Routing] [Edit Routing Task Assoc] [Edit Routing Product Link]

### .2.5.3 Tool to add product link

#### .2.5.3.1 Product ID (popup search box)

Use the popup search tool to specify the Product.

#### .2.5.3.2 Quantity

How many.

#### .2.5.3.3 Estimated Cost

How much in currency this process will cost.

#### .2.5.3.4 From Date (popup calendar)

When this association of Product to Routing is to begin; default is now.

#### .2.5.3.5 Thru Date (popup calendar)

When the association of the Product to the Routing is set to expire, if ever.

### .2.5.4 Table of current Links

#### .2.5.4.1 Product Name

What the Product is known as.

#### .2.5.4.2 From Date

When the association was made effective.

## .2.5.4.3 Thru Date (popup calendar)

When the association is expected to expire, if ever.

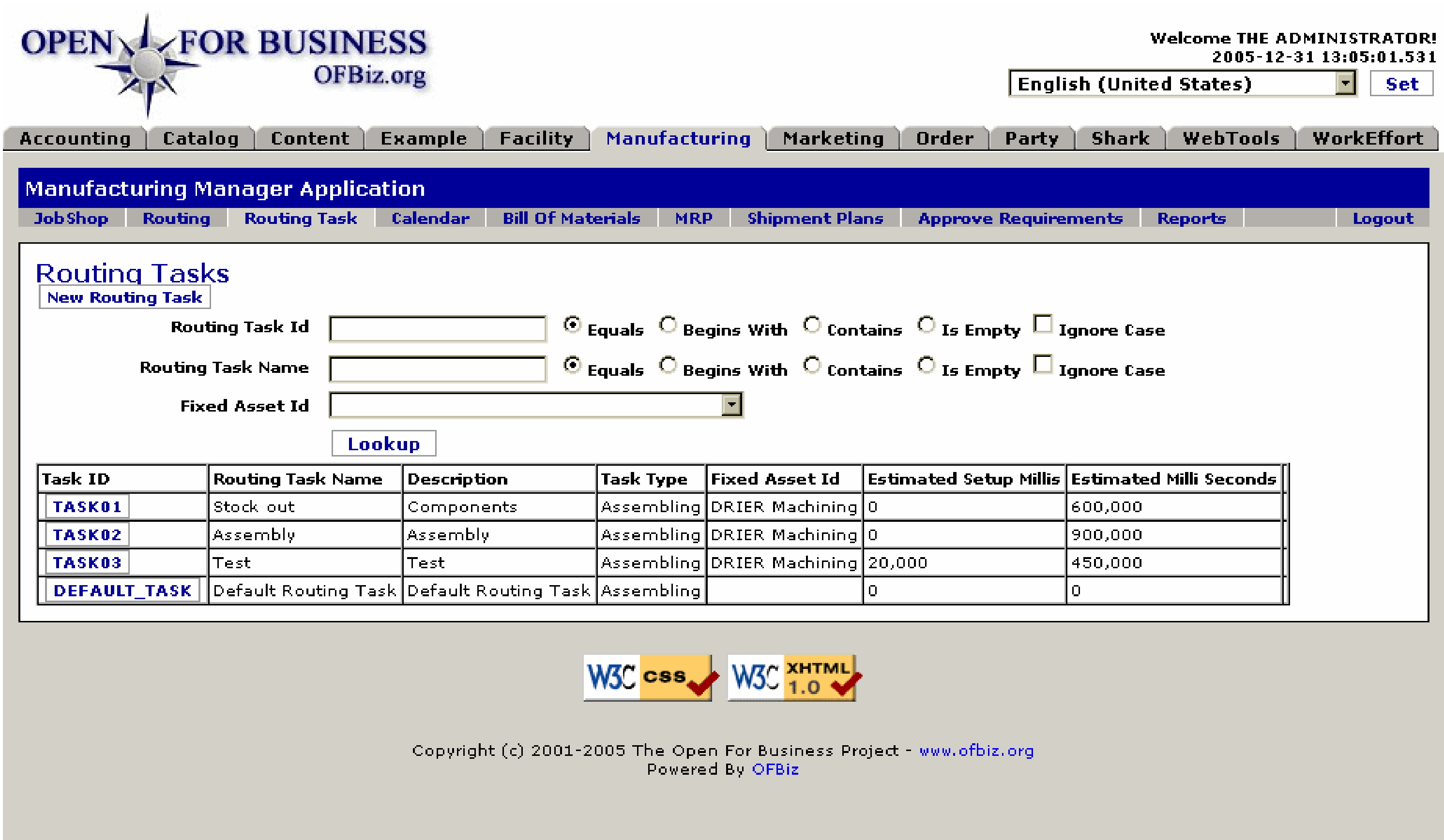
## .2.5.4.4 Quantity

How many.

# .3 Routing Task

## .3.1 Find Routing Task

### .3.1.1 FindRoutingTask




Identify existing Routing Tasks from this screen. Search results will reduce the number of Tasks displayed in the table.

## .3.1.2 link buttons

[New Routing Task] [Lookup]

## .3.1.3 Tool to find Routing Tasks

### .3.1.3.1 Routing Task ID

Enter known data, then select appropriate radio button: Equals; Begins With; Contains; Is Empty. Check the box to ignore UPPER or lower case restrictions.

### .3.1.3.2 Routing Task Name

Enter known data, full or partial, then select an appropriate radio button: Equals; Begins With; Contains; Is Empty.

Check the box to ignore UPPER or lower case restrictions.

### .3.1.3.3 Fixed Asset ID (drop-down box)

Generally used to identify facilities (shops, clean rooms), machines, etc., which need to be reserved or assigned for particular tasks. If the Routing Task depends upon one of these, this could be a useful search parameter.

## .3.1.4 Table of found Routing Tasks

This table first appears with all existing Routing Tasks presented, up to its display capacity; you can select from it by clicking on the Task ID to be taken to the Routing Task edit screen.

As criteria or parameters are entered into the search tool and the [Lookup] link engaged, only those Routing Tasks matching the entered criteria will appear in this table. If no results are returned, try entering less data; the search method is exclusionary and you might have been too restrictive in your entry.

### .3.1.4.1 Task ID

Click on the Task ID number to view or edit the Task.

### .3.1.4.2 Routing Task Name

Name by which the Routing Task is known.

### .3.1.4.3 Description

What the Routing Task involves.

### .3.1.4.4 Task Type

Assembling, manufacturing, or subcontracting are the default types listed; others could be added.

### .3.1.4.5 Fixed Asset ID

Any one of the Fixed Assets you have identified in the system could be here, especially if its use in this task needs to be scheduled through the Calendar.

### .3.1.4.6 Estimated Setup Millis

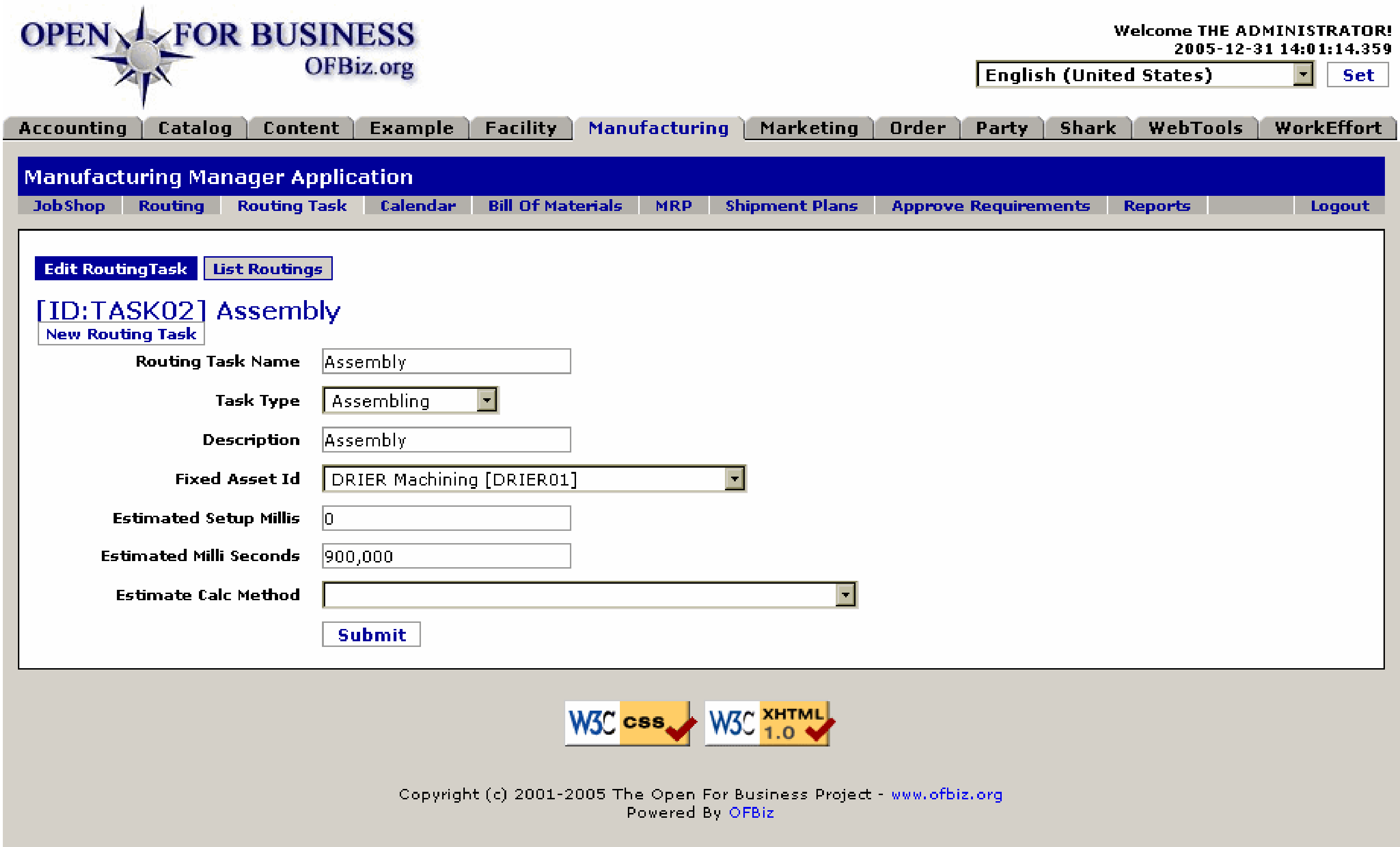
How long it will take (in milliseconds) to setup the equipment, material and personnel to prepare for the task.

### .3.1.4.7 Estimated Milli Seconds

How long the process requires for each unit of production, stated in milliseconds.

## .3.2 Edit Routing Task

### .3.2.1 EditRoutingTask




Edit an existing Routing Task from this screen.

### .3.2.2 link buttons

[New Routing Task] [Submit] [Edit Routing Task] [List Routings]

### .3.2.3 Routing Task Name

What the Routing Task is called. This name can be changed here in this field at this screen.

### .3.2.4 Task Type (drop-down box)

Select from the drop-down box. Initial types with OFBiz include the following:

- —
- Assembling
- Manufacturing
- Sub-contracting

## .3.2.5 Description

More information about what the Routing Task is or does.

## .3.2.6 Fixed Asset ID (drop-down box)

Select an existing Fixed Asset from the list on the drop-down box.

## .3.2.7 Estimated Setup Millis

Enter value in milli-seconds.

## .3.2.8 Estimated Milli Seconds

Task completion time in milli-seconds.

## .3.3 Manufacturing List Routing Task Routings

### .3.3.1 ListRoutingTaskRoutings


Locate, and then choose to view or edit an existing Routing from this screen.

### .3.3.2 link buttons

[Edit Routing] [Edit Routing Task] [List Routings]

### .3.3.3 Routing

Contains both the ID (in brackets) and the Name of the Routing. To edit, you must click on the [Edit] link in the RH column.

### .3.3.4 Sequence Num

When the processes are in a sequence, this is the assigned Sequence Number for this Routing.

### .3.3.5 From Date

When the Routing becomes active, or when it was created.

### .3.3.6 Thru Date

When the Routing or its association with the Task expires, if ever.

## .3.4 Edit Routing

Returns you to the Edit Routing sub-tab of the Routing Tab to edit the selected Routing.

# .4 Calendar

There are two options under the Calendar tab - Calendar and Week. The default opening sub-tab is Calendar as shown below. <p/> You have a list of current Calendars presented here. You can choose to [Edit] or [Delete] any of them, or you can select [New Calendar] to create a new one.

## .4.1 Calendar sub-tab

This is the default opening screen.

### .4.1.1 FindCalendar


Calendar tab opens with a list of existing Calendars from which to choose.

### .4.1.2 link buttons

[New calendar] [Edit] [Delete]

### .4.1.3 Calendar ID

What the Calendar is called, and how it is referenced by the system. To edit, you must click on the [Edit] link in the RH column.

### .4.1.4 Description

Describes the purpose and nature of the Calendar.

### .4.1.5 Calendar Week ID

Pre-defined in the Work Effort Manager.

### .4.1.6 Edit - Update Calendar

When you select an existing calendar to edit, you are taken to this screen.

## .4.1.6.1 Calendar

### .4.1.6.1.1 EditCalendar


Upon selecting a Calendar to Edit, this screen is presented. Note the tabs to work in other topics.

### .4.1.6.1.2 link buttons

[Update] [New Calendar] [Calendar] [Exception Day] [Exception Week] [Week]

### .4.1.6.1.3 Calendar ID

As it says, you cannot change without re-creating.

### .4.1.6.1.4 Description

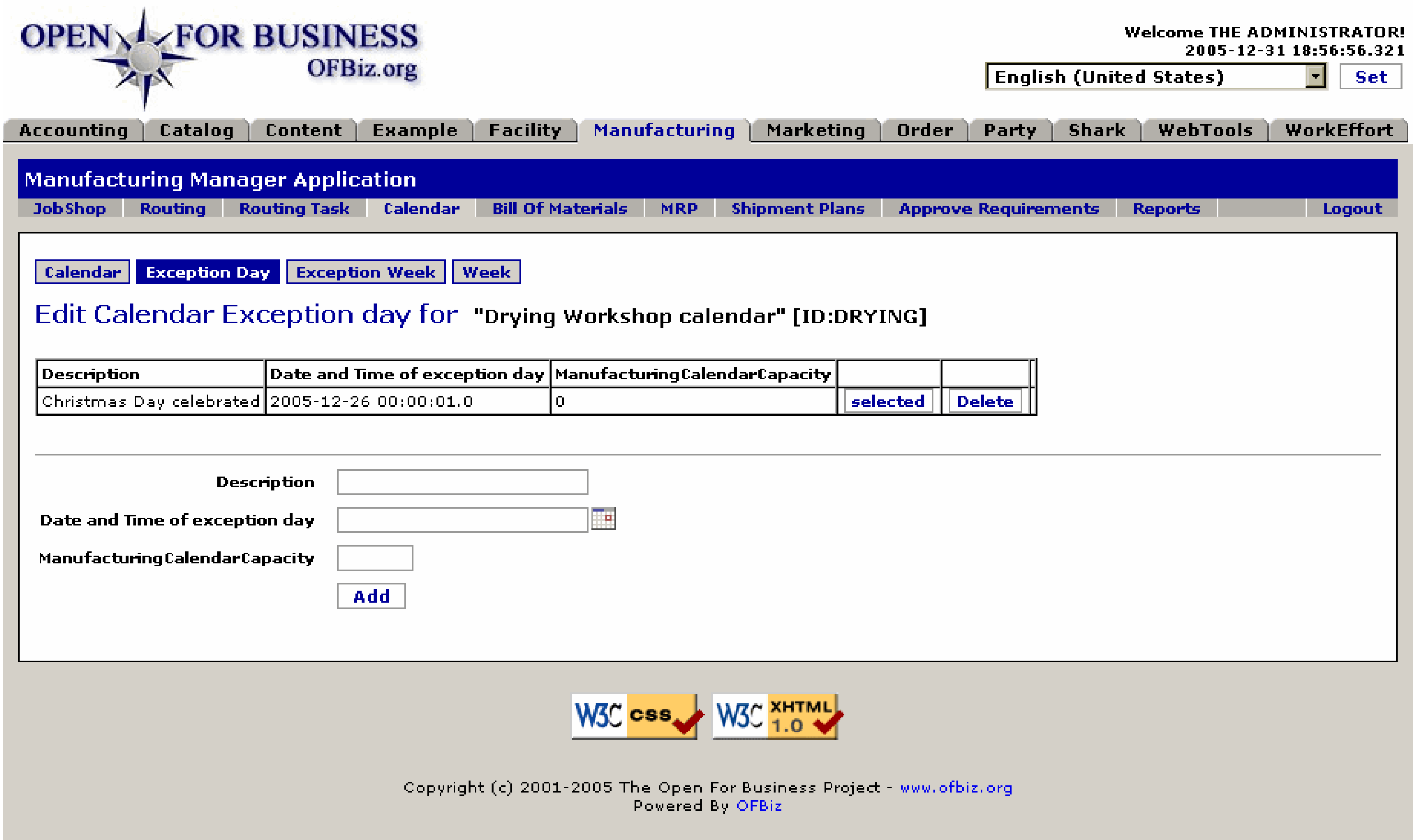
Describes the purpose or nature of this Calendar.

### .4.1.6.1.5 Calendar Week ID (drop-down box)

If you do not want to continue with the originally-assigned kind of Calendar Week, select another from the drop-down box. These are created and defined under the Week tab, discussed below.

## .4.1.6.2 Exception Day

### .4.1.6.2.1 EditCalendarExceptionDay




Special or Exception days (such as holidays) are listed and created here.

### .4.1.6.2.2 link buttons

[Selected] [Delete] [Add] [Calendar] [Exception Day] [Exception Week] [Week]

### .4.1.6.2.3 Table of existing exception days

#### .4.1.6.2.3.1 Description

Describe the day being labeled an Exception.

#### .4.1.6.2.3.2 Date and Time of exception day

What day and from what time the day becomes unavailable for scheduling.

### .4.1.6.2.3.3 Manufacturing Calendar Capacity

If the manufacturing continues through this day, what level of capacity will be provided. If none, indicated by '0'.

## .4.1.6.2.4 Tool for adding exception days

### .4.1.6.2.4.1 Description

Describe the day being labeled an Exception.

### .4.1.6.2.4.2 Date and Time (popup calendar)

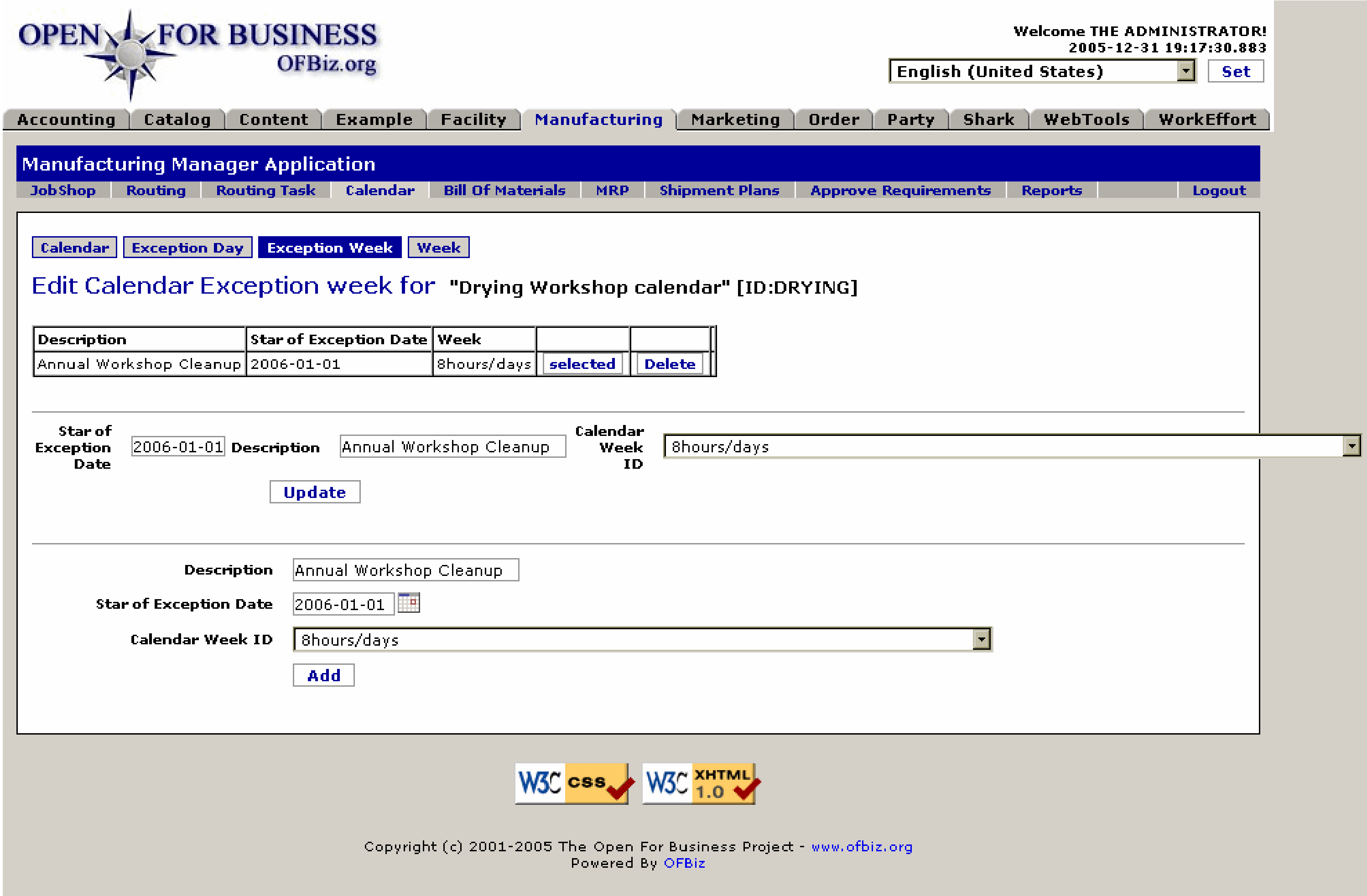
What day and from what time the day becomes unavailable for scheduling. Use the popup calendar. You might need to edit the Time portion to display midnight in the format 0:00:01.0 before the input is accepted.

### .4.1.6.2.4.3 Manufacturing Calendar Capacity

If the manufacturing continues through this day, what level of capacity will be provided. If none, indicated by '0'.

## .4.1.6.3 Exception Week

### .4.1.6.3.1 EditCalendarExceptionWeek




Exception weeks are listed and defined at this screen.

### .4.1.6.3.2 link buttons

[Selected] [Delete] [Update] [Add] [Calendar] [Exception Day] [Exception Week] [Week]

### .4.1.6.3.3 Table of existing Exception Weeks

#### .4.1.6.3.3.1 Description

What the Exception Week is about.

#### .4.1.6.3.3.2 Start of Exception Week

The date and time when the Exception Week begins.

#### .4.1.6.3.3.3 Week

What type of week.

### .4.1.6.3.4 Tool for adding an exception week

#### .4.1.6.3.4.1 Description

What the exception is about.

#### .4.1.6.3.4.2 Start of Exception Date (popup calendar)

You might need to completely remove all digits (including 0) for the Time component of the date before this date is accepted.

#### .4.1.6.3.4.3 Calendar Week ID (drop-down box)

Weeks are created and maintained under the Week tab, discussed below.

## .4.1.6.4 Week

Takes you to the Week tab, below.

## .4.1.7 New Calendar

Create a new calendar starting with this screen.

## .4.1.7.1 EditCalendar-new


Create a new Calendar from this screen.

## .4.1.7.2 link buttons

[Update] [New Calendar]

## .4.1.7.3 Calendar ID

What you want to call the Calendar.

## .4.1.7.4 Description

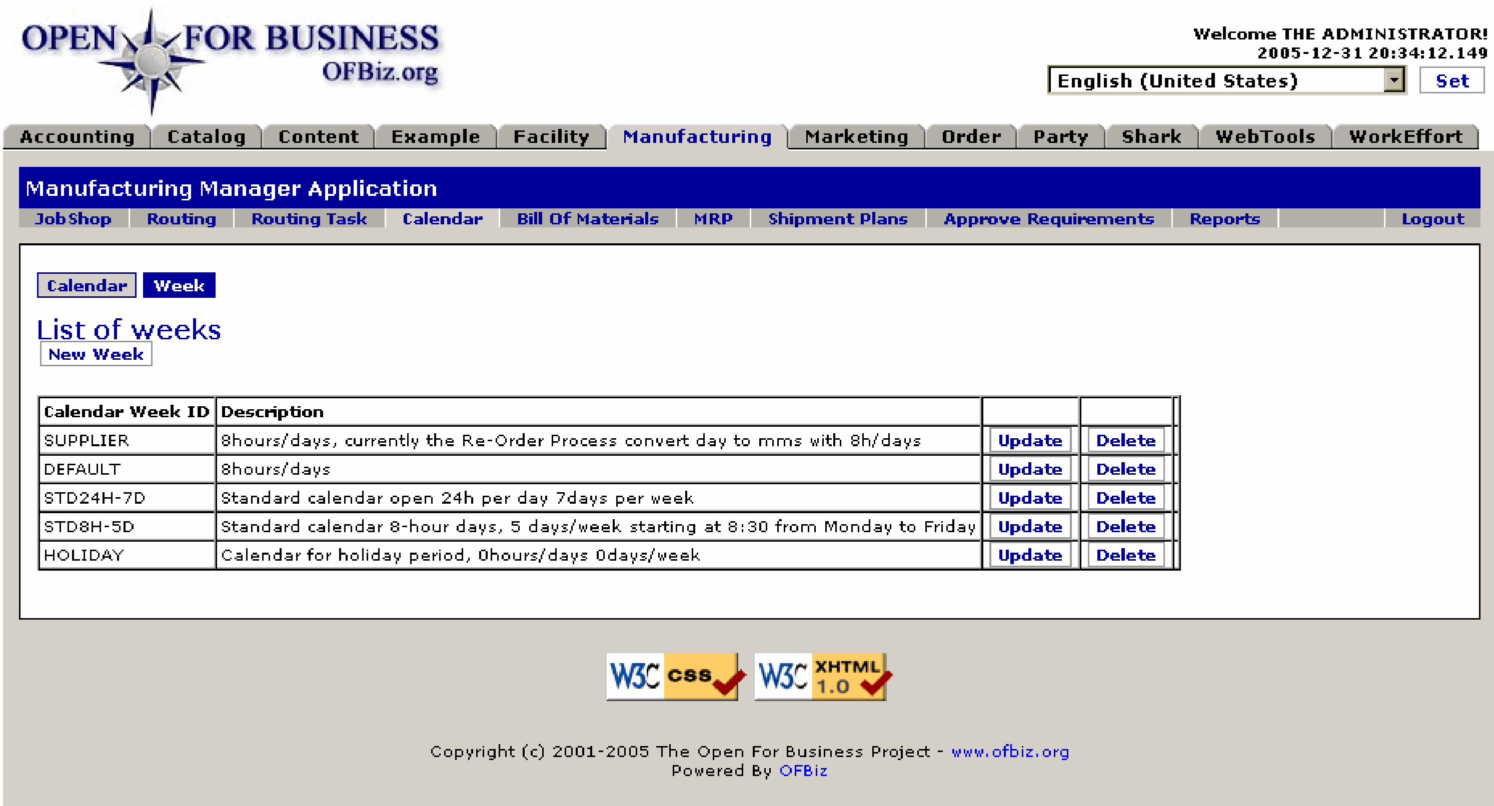
What the calendar is for or about.

## .4.1.7.5 Calendar Week ID (drop-down box)

Select from the drop-down box. These Calendar Week types are created and maintained under the Week tab, discussed below.

## .4.2 Week

### .4.2.1 ListCalendarWeek




Weeks are pre-defined for use in building calendars. This screen is where the definition starts.

### .4.2.2 link buttons

[New Week] [Update] [Delete]

### .4.2.3 Table of weeks

#### .4.2.3.1 Calendar Week ID

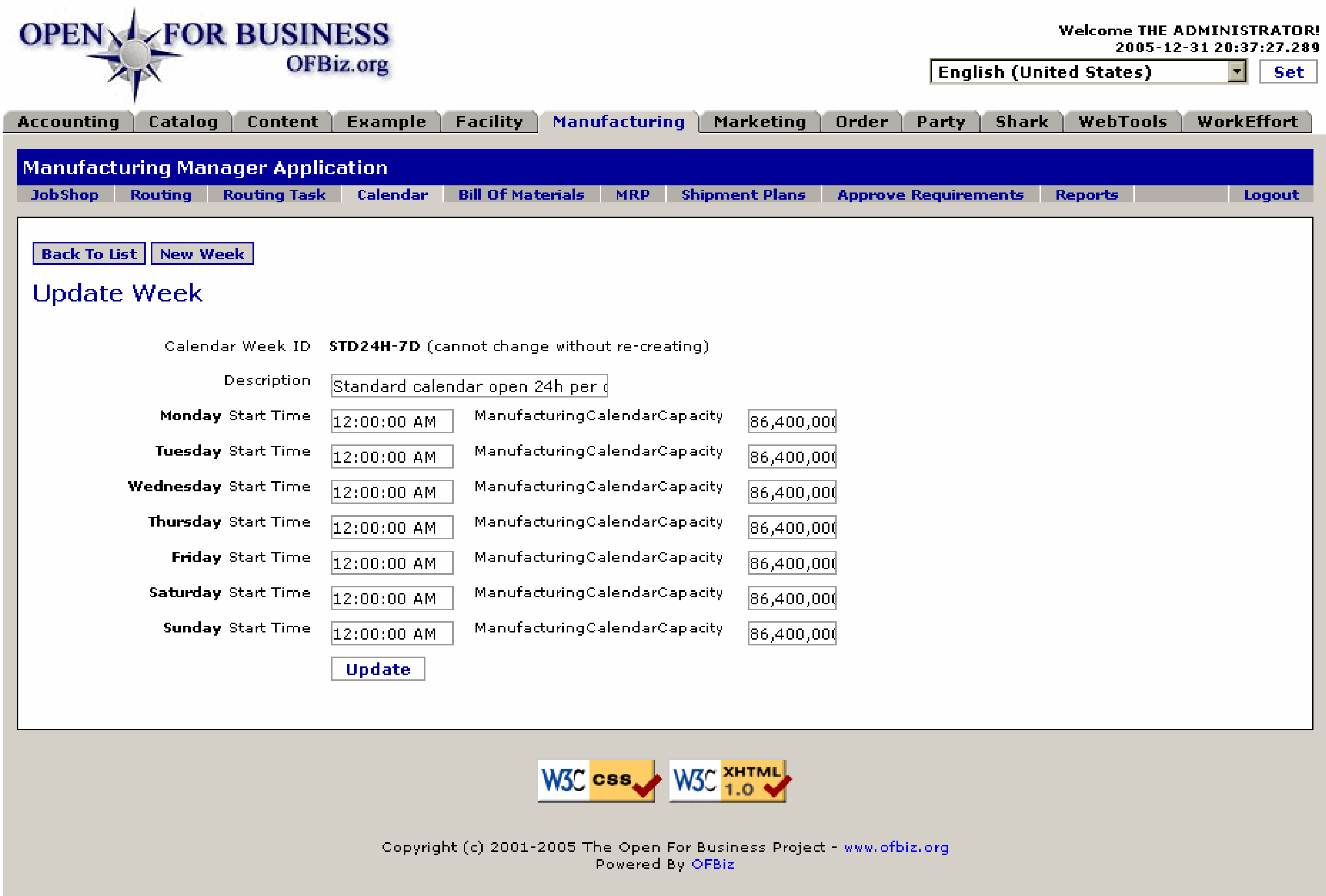
What the Week is called.

### .4.2.3.2 Description

what the week consists of in days and hours.

## .4.2.4 Update Week

### .4.2.4.1 EditCalendarWeek




Here you set the daily production start time and the daily manufacturing capacity in milliseconds.

### .4.2.4.2 link buttons

[Update] [Back To List] [New Week]

### .4.2.4.3 Calendar Week ID

Cannot change without recreating.

### .4.2.4.4 Description

Describes the days and hours comprising this specific Week.

### .4.2.4.5 Monday - Sunday Start Time

Enter the time in the 24-hour clock format (00:00:00.0). The update will enter the AM or PM designation.

### .4.2.4.6 Manufacturing Calendar Capacity

Enter the daily productivity in milliseconds: manpower X [productive daily hours] X 60 minutes X 60 seconds X 1000.

## .4.2.5 New Week

Create a new Calendar Week from this screen. <p/>NOTE: When entering the Start Time, use the format HH:MM:SS or an error message will be returned.

## .4.2.5.1 EditCalendarWeek-new


Screen for creating a new Calendar. Use the proper format for the Start Time.

## .4.2.5.2 link buttons

[Update] [Back To List] [New Week]

## .4.2.5.3 Calendar Week ID

Descriptive name to distinguish this calendar from all others.

## .4.2.5.4 Description

What days and hours are available under this calendar.

### .4.2.5.5 Monday - Sunday

#### .4.2.5.5.1 Start Time

Enter the start time in 24-hour clock time format (00:00:00.0). After you press [Update], the application will present the AM or PM designation.

#### .4.2.5.5.2 Manufacturing Calendar Capacity

Enter the daily productivity in milliseconds: manpower X [productive daily hours] X 60 minutes X 60 seconds X 1000.

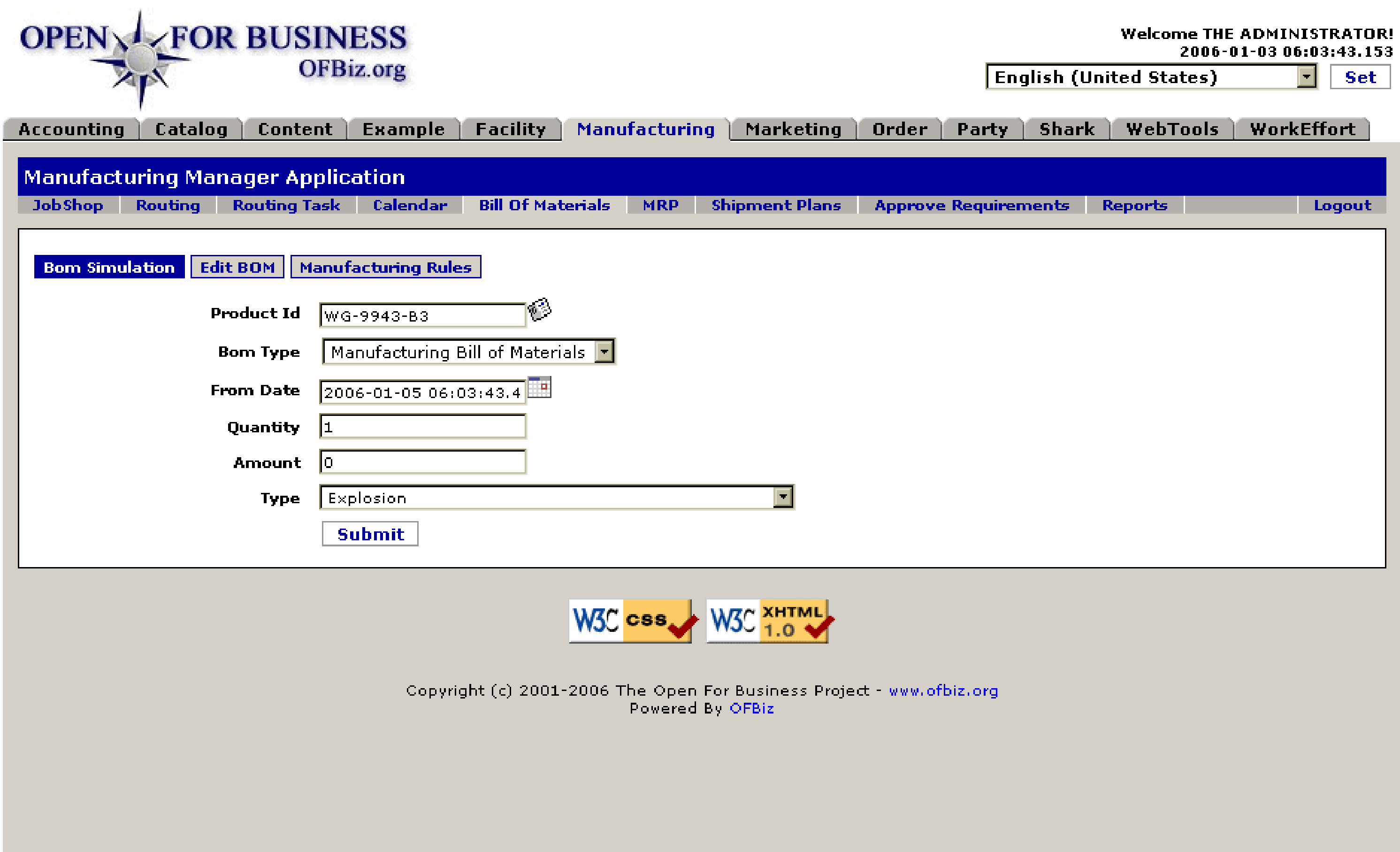
# .5 Bill of Materials

## .5.1 BOM Simulation

### .5.1.1 Find the Bill Of Materials

A Bill of Materials (BOM) is the listing of all the subassemblies, component parts, raw materials (including quantities), etc., that go into a parent item.

## .5.1.1.1 BomSimulation




Opening screen under the BOM tab; enter prarameters for your desired BOM simulation

## .5.1.1.2 link buttons

[Submit] [BOM Simulation] [Edit BOM] [Manufacturing Rules]

## .5.1.1.3 Product ID (popup search tool)

This determines which BOM you will be finding.

## .5.1.1.4 Bom Type (drop-down box)

Selections here might include:

Manufacturing Bill of Materials

### .5.1.1.5 From Date (popup calendar)

Enter the effective date.

### .5.1.1.6 Quantity

How many units.

### .5.1.1.7 Amount

How much cost.

### .5.1.1.8 Type (drop-down box)

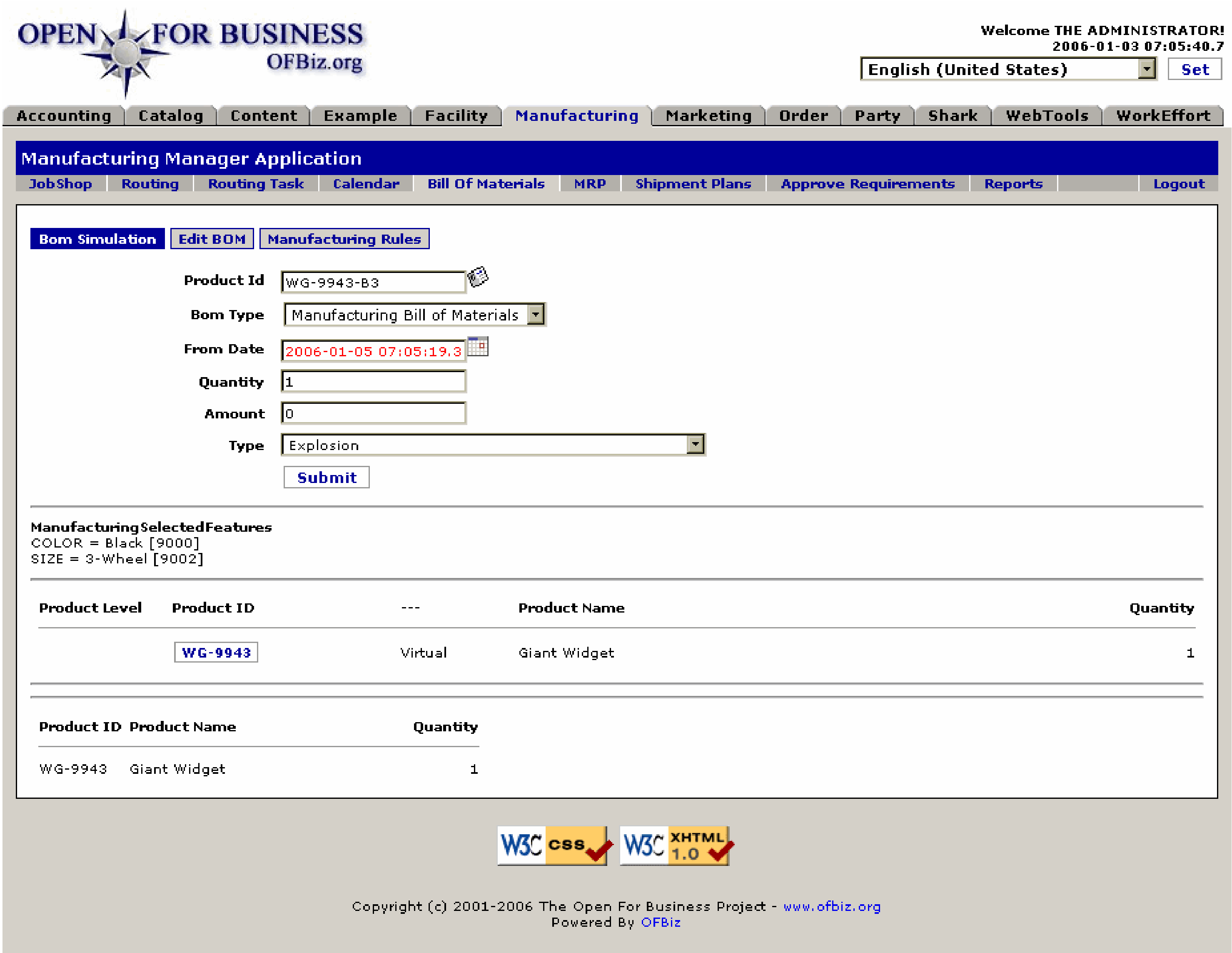
Typical types would include:

- Explosion
- Single Level Explosion
- Explosion (only for products
- needing manufacturing)
- Implosion

## .5.1.2 Bill of Materials Found

Click on the Part ID to be taken to the Edit BOM screen. Click on [Show Lookup Fields] to bring back the Find Bill Of Materials search tool.

### .5.1.2.1 runBomSimulation




Treated as a successful BOM Simulation, this screen returns with the basic Bill Of Materials.

### .5.1.2.2 link buttons

[Submit] [BOM Simulation] [Edit BOM] [Manufacturing Rules]

## .5.2 Edit BOM

A click on the Part ID or the Part Name in the table takes you to this Edit BOM screen with that Part in the Product ID window.

### .5.2.1 UpdateProductBom

OPEN FOR BUSINESS
OFBiz.org

Welcome THE ADMINISTRATOR!
2006-01-03 07:58:43.684

English (United States) | Set

Accounting | Catalog | Content | Example | Facility | Manufacturing | Marketing | Order | Party | Shark | WebTools | WorkEffort

## Manufacturing Manager Application

JobShop | Routing | Routing Task | Calendar | Bill Of Materials | MRP | Shipment Plans | Approve Requirements | Reports | Logout

**The Following Occurred:**

- **The action was performed successfully.**

Bom Simulation | Edit BOM | Manufacturing Rules

## Bill Of Materials Giant Widget B3[ID:WG-9943-B3]

Bill Of Materials

**Bom Type:** Engineering Bill of Materials **Product ID:** WG-9943-B3 Show BOM

**To Product Id:** Copy BOM

**Bom Type:** Engineering Bill of Materials

**Product ID:** WG-9943-B3

**Product ID To:**

**From Date:** (Will be set to now if empty)

**Thru Date:** 2006-01-06 07:58:05.294

**Sequence Num:** 001

**Reason:** Testing

**Instruction:** Disregard

**Quantity:** 1

**Scrap Factor %:** 50

**ManufacturingFormula:** Bom formula for linear components

**Routing Task:** DEFAULT_TA

Add

### Components of this Product

| Product ID | Product Name | From Date | Thru Date | Sequence Num | Quantity | Scrap Factor % | ManufacturingFormula | Routing Task | | |
|---|---|---|---|---|---|---|---|---|---|---|
| GZ-7000 | Massive Gizmo | 2006-01-03 07:58:43.059 | 2006-01-06 07:58:05.294 | 1 | 1 | 50 | 6002 | DEFAULT_TASK | Delete | Edit |

### This Product is a Component of

| Product ID | Product Name | From Date | Thru Date | Quantity | |
|---|---|---|---|---|---|

NOTE: Red date/time entries denote that the current time is before the From Date or after the Thru Date. If the From Date is red, association has not started yet; if Thru Date is red, association has expired (and should probably be deleted).

W3C CSS W3C XHTML 1.0



Relationship shown here is to demonstrate the function only and is not true to the components as shown.

## .5.2.2 link buttons

[Bill of Materials] [Edit] [Add] [Delete] [Show BOM] [Copy BOM] [BOM Simulation] [Edit BOM] [Manufacturing Rules]

## .5.2.3 Bill of Materials worksheet

### .5.2.3.1 Discussion of the Worksheet

This is where you are relating one product ID to another as a component of the other. The subordinate items become part of the Bill Of Materials of the master ID.

Other data regarding when and why this happening is also collected here.

A similar screen is shown when you choose to Edit one of the component parts.

### .5.2.3.2 BOM Type (drop down box)

Types might include:

- Manufacturing Bill of Materials
- Engineering Bill of Materials

### .5.2.3.3 Product ID (popup search tool)

Enter directly or use the popup search tool to identify the Product ID.

### .5.2.3.4 Product ID To (popup search tool)

Enter directly or use the popup search tool to identify the Product ID which the subject Product is related TO.

### .5.2.3.5 From Date (popup calendar)

Will be set to the present date and time if left blank.

### .5.2.3.6 Thru Date (popup calendar)

If the relationship is to expire, enter that date here.

### .5.2.3.7 Sequence Num

If a sequencing system is in place, enter the number for this item here.

### .5.2.3.8 Reason

Why the Bill of Materials is being generated.

### .5.2.3.9 Instruction

What additional steps or procedures need to be taken.

### .5.2.3.10 Quantity

How many.

### .5.2.3.11 Scrap Factor

If a part is consumed in the process, what is the scrap factor remaining, in per cent of original value.

### .5.2.3.12 Manufacturing Formula (drop-down box)

Use the drop-down box to select. Typical formulas might be: Bom formula for linear components

Example Bom formula (qty*k)

### .5.2.3.13 Routing Task (popup search tool)

If a Routing Task applies, select it from the popup search tool.

## .5.2.4 Components of this Product

### .5.2.4.1 Product ID

Click on the Product ID here to go to the BOM Editing page of its related Product.

### .5.2.4.2 Product Name

Click on the Product Name here to go to the BOM Editing page of its related Product.

### .5.2.4.3 From Date

The date from which the association was made or will be made effective.

### .5.2.4.4 Thru Date

The date after which the association will expire.

### .5.2.4.5 Sequence Num

If applicable, the sequencing number will be given here.

### .5.2.4.6 Quantity

How many.

### .5.2.4.7 Scrap Factor

The remaining value, in a percentage, following the process.

### .5.2.4.8 Manufacturing Formula

Typical formulas might be: Bom formula for linear components

Example Bom formula (qty*k)

### .5.2.4.9 Routing Task

If a Routing Task is related, it could be shown here.

## .5.2.5 This Product is a Component of:

### .5.2.5.1 Product ID

Click on the Product ID here to go to the BOM Editing page of its parent Product.

### .5.2.5.2 Product Name

Click on the Product Name here to go to the BOM Editing page of its parent Product.

### .5.2.5.3 From Date

When the product was associated its parent.

### .5.2.5.4 Thru Date

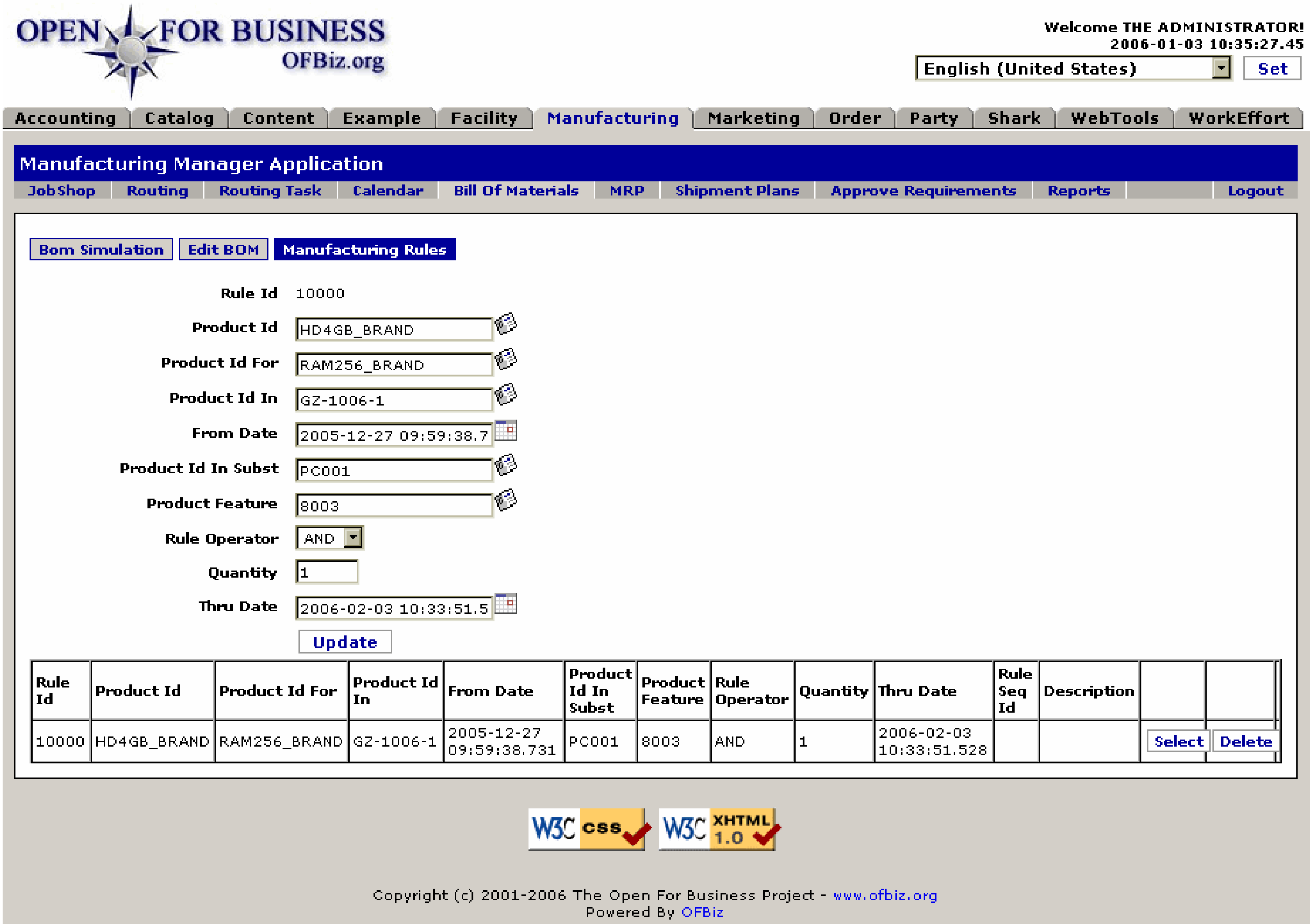
If the association will expire, this is the date.

### .5.2.5.5 Quantity

How many.

## .5.3 Manufacturing Rules

### .5.3.1 EditProductManufacturingRules




Find or select Manufacturing Rule for editing or deletion from this screen. (Fictitious example shown for illustration only.)

### .5.3.2 link buttons

[Select] [Delete] [Update] [BOM Simulation] [Edit BOM] [Manufacturing Rules]

## .5.3.3 Add or edit Manufacturing Rule

When the Rule ID field is empty, you are creating a new Rule at this screen. If the Rule ID is populated (you having selected an existing Rule), you will be updating or editing the Rule from this screen. The fields are the same, whether creating or updating them here.

### .5.3.3.1 Rule ID

This number is assigned by the system when the Rule is created.

### .5.3.3.2 Product ID (popup search tool)

Whether creating a new Rule or editing an existing one, you can select the Product ID using the popup search tool.

### .5.3.3.3 ProductID For (popup search)

Which product this Rule is For is selected at this field.

### .5.3.3.4 Product ID In (popup search)

If the Rule is about a product which is part of another, the Parent is given in this field.

### .5.3.3.5 From Date (popup calendar)

The Rule is effective from this Date. Use the popup calendar to declare or change the date.

### .5.3.3.6 ProductID In Subst (popup search tool)

The Product 'In Subst' is selected with the popup search tool here.

### .5.3.3.7 Product Feature (popup search tool)

Select the Feature with the popup search tool.

### .5.3.3.8 Rule Operator (drop-down box)

Select AND, OR or another choice from the drop-down box.

### .5.3.3.9 Quantity

How many.

### .5.3.3.10 Thru Date (popup calendar)

The conclusion of the applicability; the expiration date of this Rule.

## .5.3.4 Table of existing Manufacturing Rules

### .5.3.4.1 Rule ID

This number is assigned by the system when the Rule is created.

### .5.3.4.2 Product ID

Which Product this Rule applies to in the Manufacturing thereof.

### .5.3.4.3 Product ID For

Which product this Rule is For.

### .5.3.4.4 Product ID In

If the Rule is about a product which is part of another, the Parent is given in this field.

### .5.3.4.5 From Date

When the Rule was made effective.

### .5.3.4.6 Product ID In Subst

The Product 'In Subst' is identified here.

### .5.3.4.7 Product Feature

Which Feature is to be incorporated under this Rule.

### .5.3.4.8 Rule Operator

Logical Operator (AND, OR) or none if none apply.

### .5.3.4.9 Quantity

How many.

### .5.3.4.10 Thru Date (popup calendar)

If the Rule is to expire, this will be the date.

### .5.3.4.11 Rule Seq ID

If there is a sequencing system in place, here is the number for this Rule.

### .5.3.4.12 Description

The Rule could be described here.

# .6 MRP

## .6.1 Run MRP

### .6.1.1 RunMrp


Enter the MRP name, select the Product Facility, click [Submit], and this report is given.

### .6.1.2 link buttons

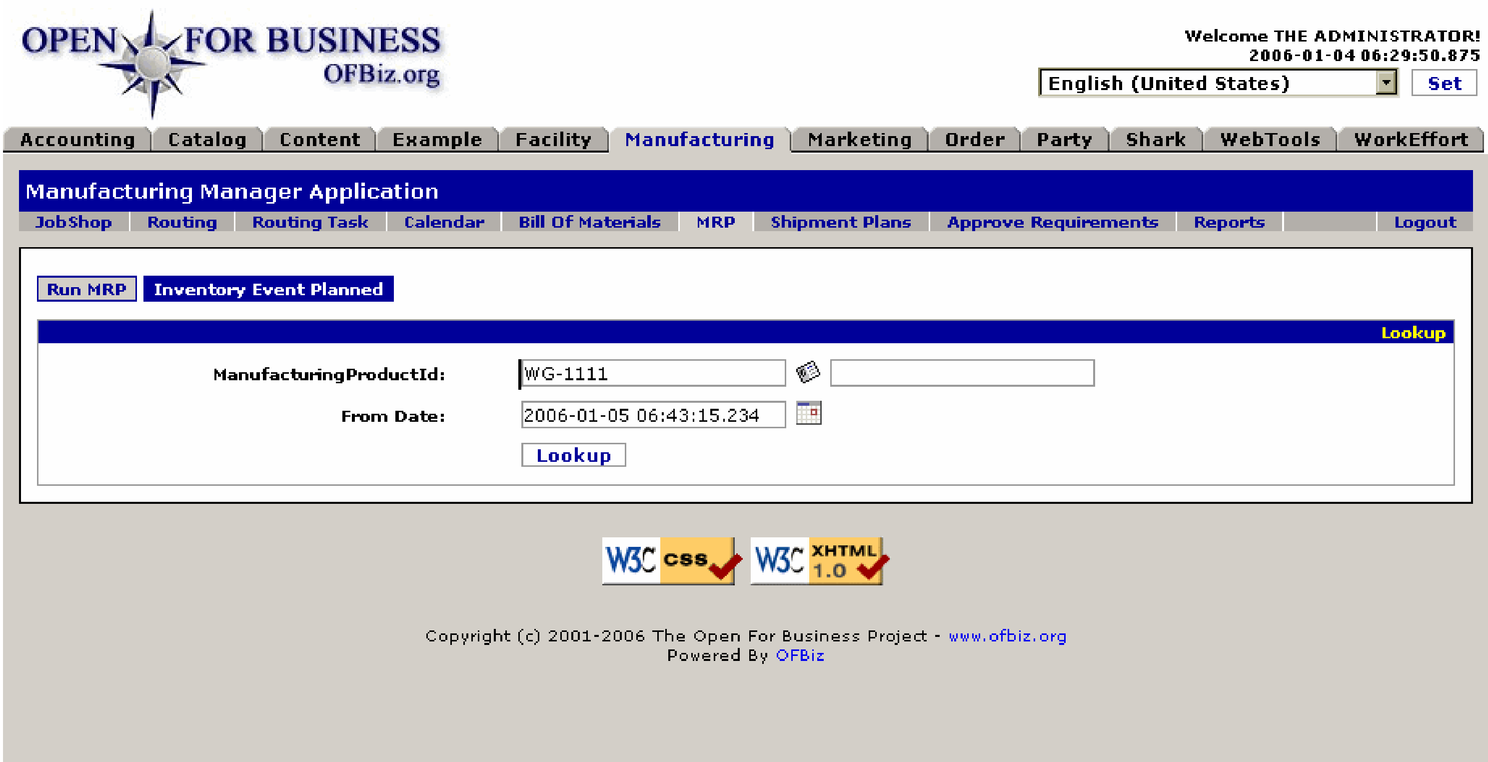
[Submit] [Run MRP] [Inventory Event Planned]

### .6.1.3 Product Facility

Using the drop-down box, select the facility for MRP.

## .6.2 Inventory Event Planned

### .6.2.1 FindInventoryEventPlan




Tool for finding the Inventory Event.

### .6.2.2 link buttons

[Lookup] [Run MRP] [Inventory Event Planned]

### .6.2.3 Manufacturing Product ID

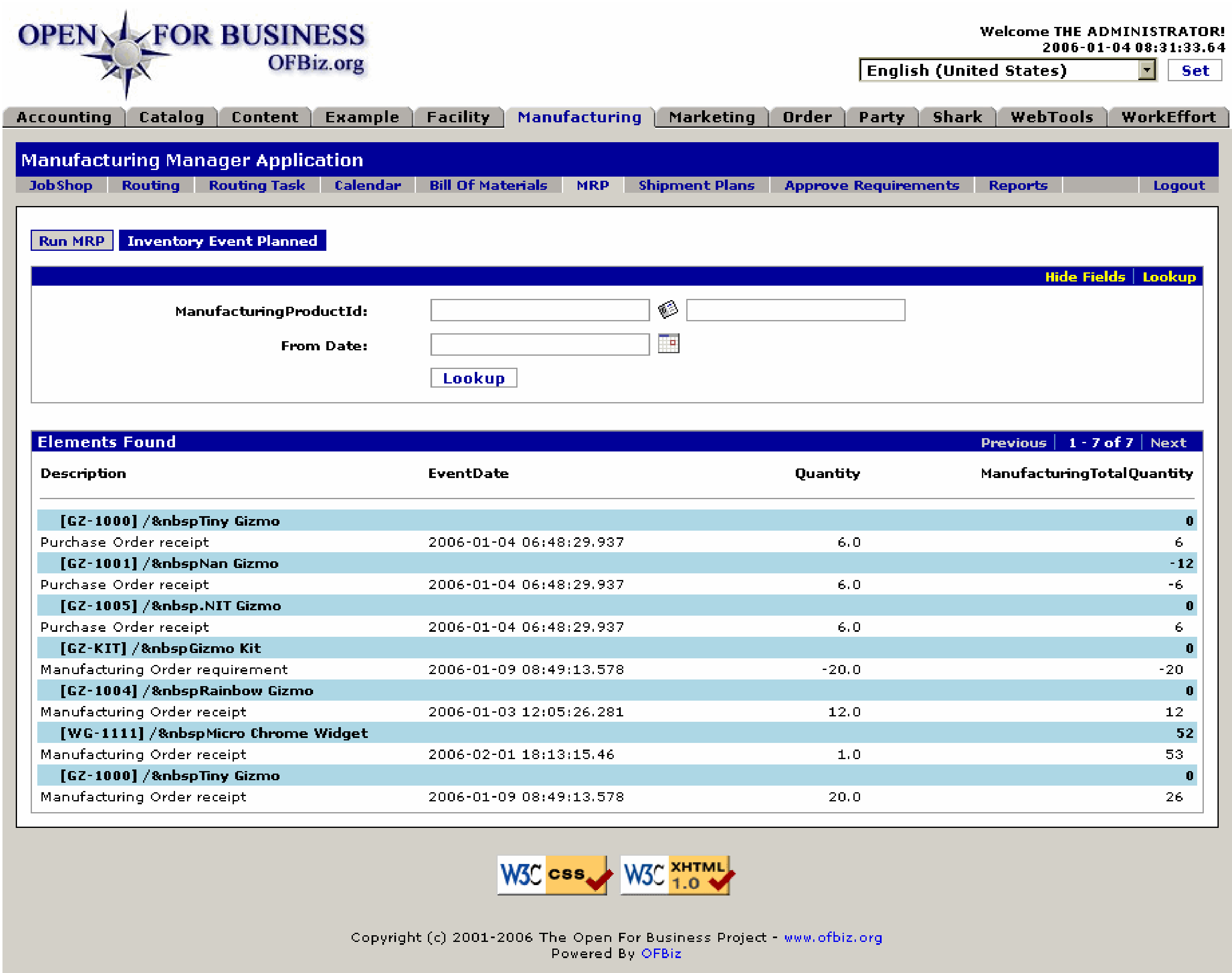
Use the popup search tool to assign the Product for inventory. When a ProductID is selected, the name will populate the RH box.

### .6.2.4 From Date (popup calendar)

This is a filter date. No IEP before this date will be displayed.

## .6.2.5 Inventory Found

### .6.2.5.1 FindInventoryEventPlan-found




All elements are found when searching on empty lookup fields.

### .6.2.5.2 link buttons

[Lookup] [Hide / Show Fields] [Run MRP] [Inventory Event Planned]

### .6.2.5.3 Lookup tool

Fields same as discussed above.

### .6.2.5.4 Table of Elements Found

#### .6.2.5.4.1 Description

Describes the Inventory Event.

#### .6.2.5.4.2 Event Date

When it happened or was scheduled to happen.

#### .6.2.5.4.3 Quantity

How many units of the product were involved.

#### .6.2.5.4.4 ManufacturingTotalQuantity

Balance of inventory following the event.

# .7 Shipment Plans

## .7.1 Correlation with other managers

### .7.1.1 What is a Shipment Plan?

Shipment plans are created like a normal shipment (thru the shipment screens in the Facility Manager), and they ARE normal shipments, but they exist only in the 'Scheduled' status.

In a shipment plan you usually put more than one order (but this is not mandatory). In fact Shipment Plans are used to group together orders for products that will be manufactured within the same end date.

For this reason, in a shipment plan you list Order Items, but you don't issue the products from the Warehouse to Shipping until you have produced them, either from vendors, through assembly or by the manufacturing process.

## .7.1.2 Shipments Process

### .7.1.2.1 Create the Shipment

Step 1 - In the Facility Manager: an empty shipment is created.

### .7.1.2.2 Assign items to the Shipment

Step 2 - In the Facility Manager: order items (also from different orders) are assigned to the shipment. These are all the products that we want to produce within a given period to meet the shipment's estimated ship date.

### .7.1.2.3 Status changed to Scheduled

Step 3 - Facility Manager: when the shipment plan is complete (i.e. all the products that we want to group together have been added) the shipment's status is changed to 'Scheduled'.

### .7.1.2.4 Scheduled Shipments displayed

Step 4 - Manufacturing manager: under the 'Shipment Plans' tab, all the scheduled shipments are shown. This is what is described in the Manufacturing Reference under Shipment Plans - Table.

### .7.1.2.5 Analyze needs for manufacturing

Step 5 - Manufacturing Manager: from the Shipment Plan > Detail page, you can generate a PDF report to help analyze the amount of materials (products) needed. From this you are better able to manufacture or assemble all the products in the shipment plan against the inventory levels of materials in the warehouse.

### .7.1.2.6 Resource adjustments

Step - 6 Manufacturing Manager: if there are not enough materials in the warehouse, the manufacturing process must be placed on hold. Through Purchase Orders (using the Order Manager) you should order any of the materials needed.

If material or components are not available, adjust the schedule to exclude the affected products from the shipment plan.

### .7.1.2.7 Create Production Runs

Step - 7 Manufacturing Manager: when you are sure that you have enough materials in your Warehouse to complete the manufacturing process, go to the JobShop screens and click on [Create all Production Runs]. All the production runs will be automatically created and they will have the same name SP_(shipmentPlanId) to make it easier to group them. At least one production run for each Shipment Plan item will be created.

### .7.1.2.8 Monitor from the Job Shop

Step - 8 Manufacturing Manager: monitor and control each Production Run in the JobShop screens as usual.

### .7.1.2.9 Manufactured products moved to Warehouse

Step-9 Manufacturing Manager: when a production run is completed, the finished (manufactured) products are put into the warehouse.

### .7.1.2.10 Completion

Step - 10 Manufacturing Manager: when all the production runs linked to the shipment plan are completed, the shipment plan is finished.

### .7.1.2.11 Release shipments

Step - 11 Facility Manager: in the shipment page, issue all products from the Warehouse as a normal shipment. Do this with confidence that all the products are in the warehouse, having been manufactured by the Production Runs.

# .7.2 Shipment Plans

## .7.2.1 WorkWithShipmentPlans


To edit or view the Shipment Plan, click on the [View] link.

## .7.2.2 link buttons

[View]

## .7.2.3 Shipment ID

Click on the [View] link to the right to view or update.

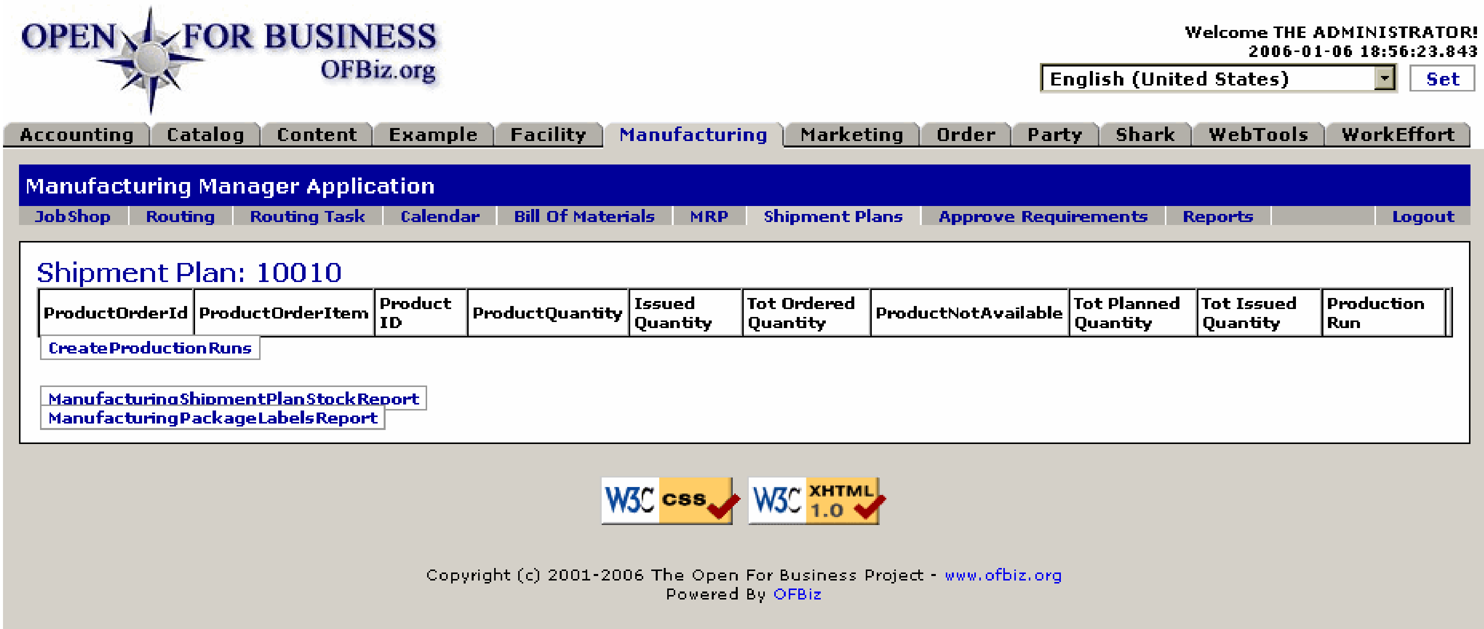
## .7.2.4 Status ID

Current status of this Shipment.

## .7.2.5 Estimated Ship Date

When the Shipment is expected to be sent.

# .7.3 Shipment Plan - View




If the Shipment involves a manufacturing step to be completed, details of that are given here.

## .7.3.1 WorkWithShipmentPlans-view

## .7.3.2 link buttons

[Create Production Runs] [ManufacturingShipmentPlanStockReport] [ManufacturingPackageLabelsReport]

## .7.3.3 ProductOrderID

The original Order number assigned to the order from the customer.

## .7.3.4 ProductOrderItem

Each of the different 'things' requested in an order is treated as an 'Item'; this column identifies which of the Items this Product Order is dealing with.

## .7.3.5 Product ID

The specific Product which needs to be assembled, produced, manufactured or obtained in order to complete this Shipment.

### .7.3.6 ProductQuantity

For this particular Production Run, how many are going to be produced.

### .7.3.7 Issued Quantity

Up to this moment, how many have already been issued, released from inventory, etc., to fulfill this Shipment.

### .7.3.8 Tot Ordered Quantity

Total number requested in this Order. This is how many needs to be accounted for to completely fulfill the Shipment.

### .7.3.9 Product Not Available

How many units are needed but not available.

### .7.3.10 Tot Planned Quantity

How many are planned in total to be produced with this Production Run.

### .7.3.11 Tot Issued Quantity

Total quantity actually issued with this Shipment for this Production Run.

### .7.3.12 Production Run

Click on this number to view or edit the Production Run associated with this Shipment.

## .8 Approve Requirements

### .8.1 Find existing Requirements

#### .8.1.1 ApproveRequirements


Use the search tool and the sought-for Requirement(s) will appear in the table of Requirements.

#### .8.1.2 link buttons

[Lookup] [Submit Button] [View]

## .8.1.3 Search tool

### .8.1.3.1 ManufacturingRequirement ID

Enter as much of the Requirement ID as you can recall, then select the appropriate radio button: Equals; Begins With; Contains; Is Empty.

### .8.1.3.2 Manufacturing Requirement Type ID (drop-down box)

Select from the drop-down box:

- Production Run proposed by the MRP process
- Purchase Order
- proposed by the MRP process
- Customer Requirement
- Internal Requirement
- Product
- Requirement
- Work Requirement

### .8.1.3.3 Product ID (popup search box)

Either enter the ID number or use the popup search box.

### .8.1.3.4 Description

Enter what portion of the Description you are sure of, then select an appropriate Radio Button. Check the box to disregard UPPER or lower case in the characters.

### .8.1.3.5 Manufacturing Requirement Start Date

Powerful search parameters to bring in both the 'greater than', and the 'less than' range of dates. Use combinations of the popup calendars and one of the following radio buttons to bracket or pinpoint the assumed Start Date for your search:

- Equals
- Same Day
- Greater Than From Day Start
- Greater Than
- ---------

- Less Than
- Up To Day
- Up Thru Day
- Is Empty

### .8.1.3.6 Manufacturing Requirement By Date

Powerful search parameters to bring in both the 'greater than', and the 'less than' range of dates. Use combinations of the popup calendars and one of the following radio buttons to bracket or pinpoint the assumed By Date for your search:

- Equals
- Same Day
- Greater Than From Day Start
- Greater Than
- ---------
- Less Than
- Up To Day
- Up Thru Day
- Is Empty

## .8.1.4 Table of existing requirements

### .8.1.4.1 Requirement ID

Click on the ID number in this column to view or edit the requirement.

### .8.1.4.2 Requirement Type ID

Will probably be one of the following:

- Production Run proposed by the MRP process
- Purchase
- Order proposed by the MRP process
- Customer Requirement
- Internal Requirement
- Product
- Requirement
- Work Requirement

### .8.1.4.3 Product ID

Which Product is subject of the Requirement.

### .8.1.4.4 Requirement Start Date

When the Requirement was generated.

### .8.1.4.5 Requirement By Date

The date by which the Requirement needs to be fulfilled.

### .8.1.4.6 Quantity

How many are Required.

### .8.1.4.7 Select

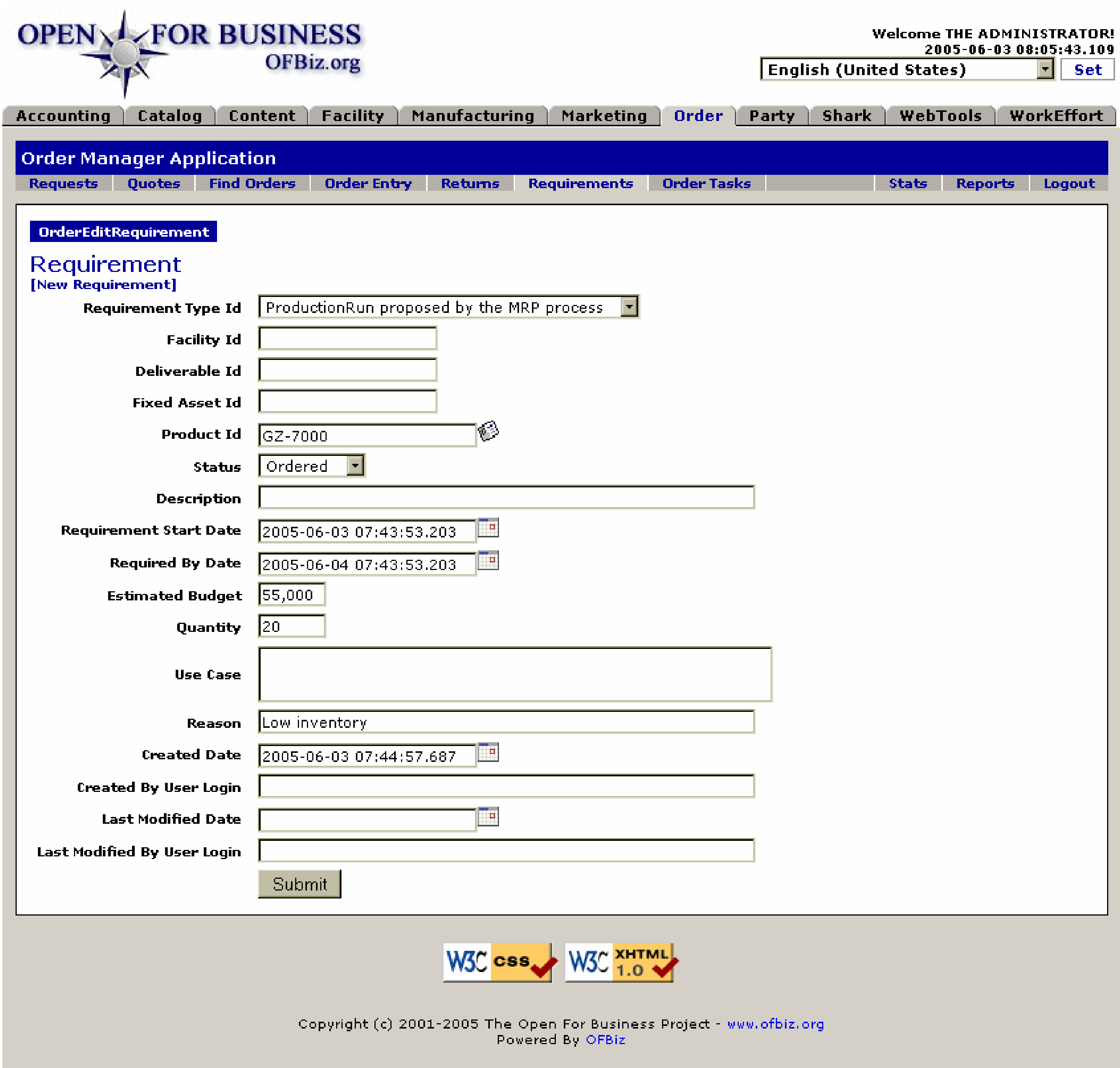
Click on [View] to view or edit the Requirement.

### .8.1.4.8 Submit Button link

Click on the [Submit Button] link to approve the Requirement.

## .8.2 Edit Requirement

### .8.2.1 EditRequirement




When a Requirement is selected for Editing, you are taken to the Order Manager - Requirements tab, here.

### .8.2.2 Discussion about Edit Requirements

When a Requirement is selected for Editing, you are taken to the Order Manager - Requirements tab. Perform the edit processing, including change of Status, there in the Order Manager.

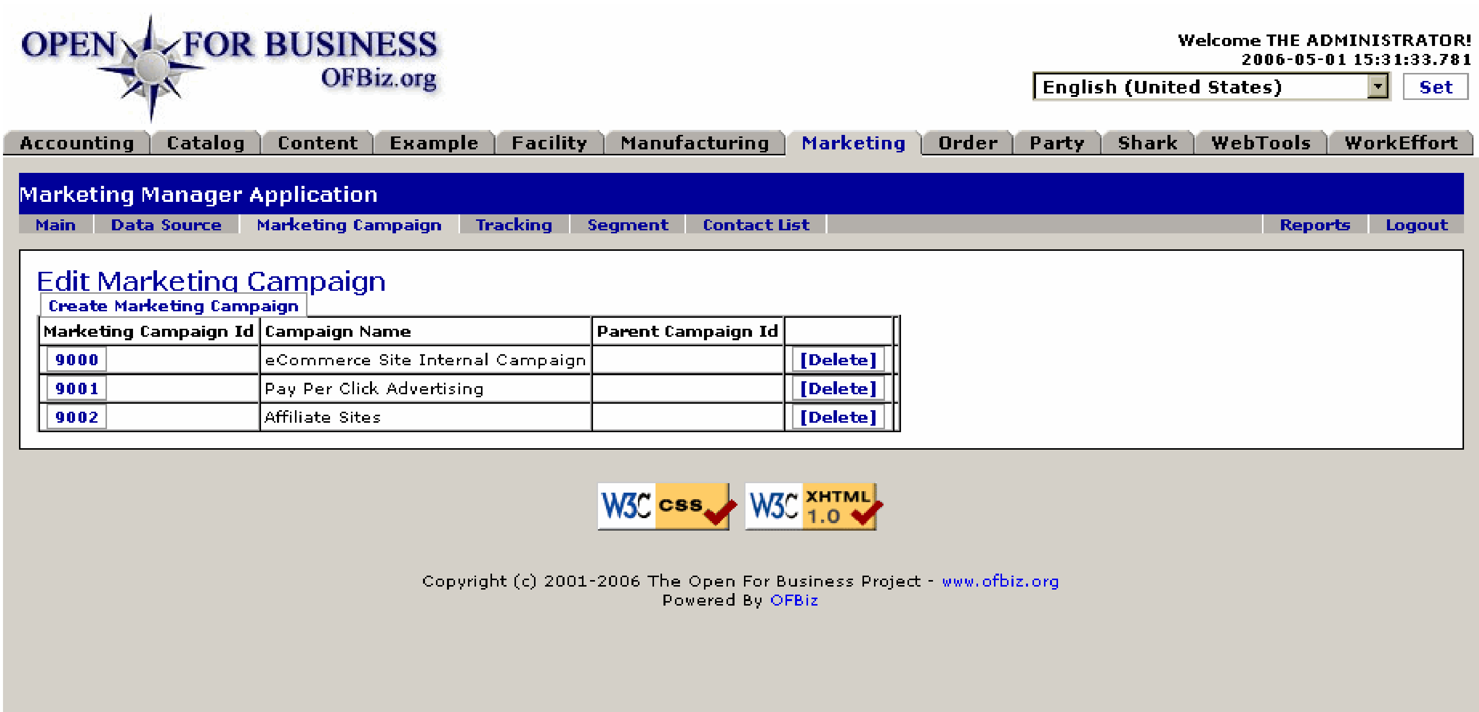
## .9 Reports

This section is under development.

# Chapter 13: Marketing Manager

## .1 Main

### .1.1 main




Identify an existing Marketing Campaign from this table. Click the ID number to edit.

### .1.2 Redirection

The Main tab is not used. Upon opening the Marketing Manager application, your first screen is under the Campaign tab with a table of existing Campaigns. Either select one of the campaigns to edit (by clicking on the Marketing Campaign ID), Create a new Marketing Campaign, or choose another tab.

## .2 Data Source

### .2.1 FindDataSource


Click on the Data Source ID to edit. This screen is a directory that appears when you select the Data Source tab.

### .2.2 link buttons

[Delete] [Create Data Source] [DataSource] [DataSource Type]

### .2.3 Table of existing Data Sources

#### .2.3.1 Data Source ID

Generally a one-word ID as used in calls. Click on this to edit the Data Source.

#### .2.3.2 Description

The purpose or application for the Data Source.

## .2.3.3 Data Source Type ID

New Types can be developed under the Data Source Type sub-tab.

## .2.4 Link to Create a Data Source

### .2.4.1 EditDataSource-new


Basically the same screen as EditDataSource, below, except that you will specify the ID to be used.

## .2.5 Edit Data Source

### .2.5.1 EditDataSource


Edit an existing Data Source at this screen.

### .2.5.2 link buttons

[Create Data Source] [Save] [Data Source] [Data Source Type]

### .2.5.3 Data Source ID

Cannot be changed. This is the identity used by the system when a Data Source is required.

### .2.5.4 Data Source Type ID (drop-down box)

You can instantly create a new Data Source Type after clicking on the Data Source sub-tab.

Types of Data Source initially included are:

- Administrative Data Entry

- Content and Data Resource Creation
- Contest Signup
- Mailing List Signup
- Purchased Data
- Website Data Entry

## .2.5.5 Description

In a few succinct words, describe the function or purpose of the Data Source here. This field can always be edited.

# .2.6 Edit Data Source Type

## .2.6.1 FindDataSourceType


Click on the [Create Data Source Type link to create a new Data Source Type.

## .2.6.2 link buttons

[Create Data Source Type] [Delete] [Edit] [Data Source] [Data Source Type]

## .2.6.3 Data Source Type ID

The name of the Data Source Type.

### .2.6.4 Description

What the Data Source Type is all about.

## .2.6.5 Create Data Source Type link

### .2.6.5.1 EditDataSourceType


Create your new Data Source Type at this screen. The name cannot be changed later, only the description.

### .2.6.5.2 link buttons

[Save] [Data Source] [Data Source Type]

### .2.6.5.3 Data Source Type ID

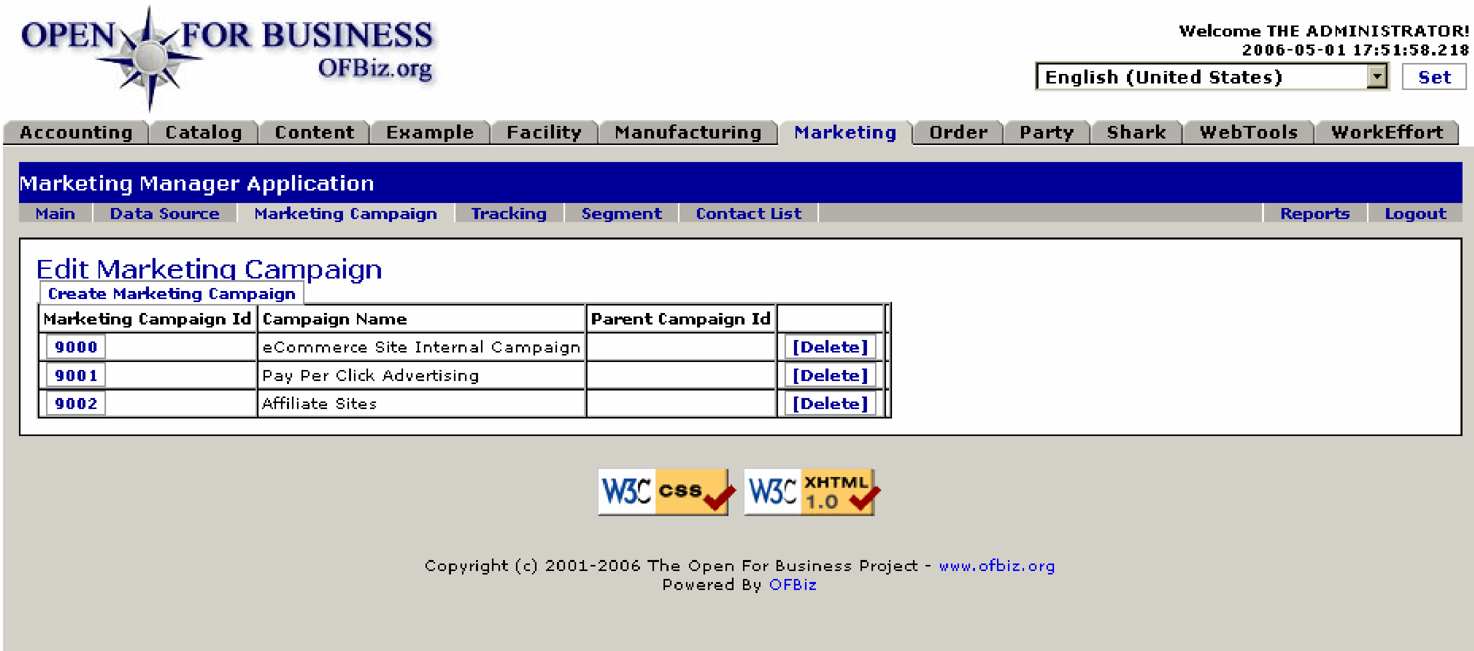
Give a descriptive name here, short and succinct.

### .2.6.5.4 Description

What is the purpose or function of this Data Source Type?

## .3 Marketing Campaign

### .3.1 FindMarketingCampaign




Existing Campaigns are shown here; click on the Marketing Campaign ID to edit.

### .3.2 link buttons

[Create Marketing Campaign] [Delete]

### .3.3 Table of existing campaigns

#### .3.3.1 Marketing Campaign ID

Click on the ID number to edit the campaign.

#### .3.3.2 Campaign Name

What you are calling the Campaign.

## .3.3.3 Parent Campaign ID

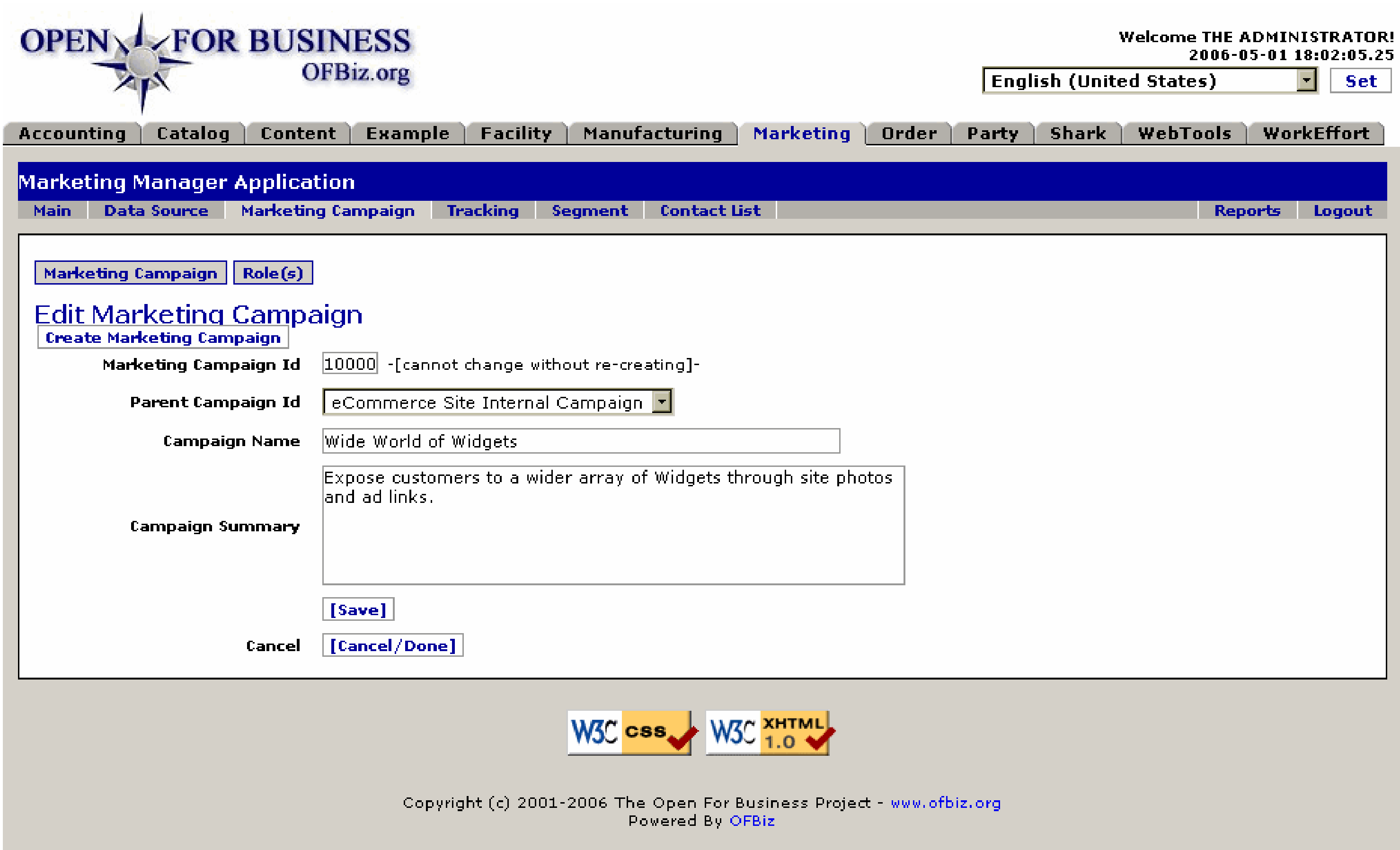
If this Campaign is a sub-set or child of another identified Campaign, here is the ID of the Parent.

## .3.4 Edit

Click on the Campaign ID or the [Edit] link to bring up the editing screen.

### .3.4.1 Existing Marketing Campaign

#### .3.4.1.1 EditMarketingCampaign




Return to an existing Campaign to edit it at this screen.

#### .3.4.1.2 link buttons

[Create Marketing Campaign] [Save] [Cancel / Done] [Campaign] [Roles]

### .3.4.1.3 Marketing Campaign ID

This is automatically generated; cannot be changed.

### .3.4.1.4 Parent Marketing Campaign (drop-down box)

All the existing Campaigns are listed on the drop-down box, making it easy to reassign this one campaign to another parent if you need to.

### .3.4.1.5 Campaign Name

The name by which you know this campaign.

### .3.4.1.6 Campaign Summary

Summarize the target, method and aims of the Campaign in this box.

## .3.4.2 New Marketing Campaign

### .3.4.2.1 EditMarketingCampaign-new


Create a new Campaign starting with the name and summary at this screen.

### .3.4.2.2 link buttons

[Save] [Cancel / Done]

### .3.4.2.3 Parent Campaign ID (drop-down box)

If there is a Parent campaign, select it from the drop-down box.

### .3.4.2.4 Campaign Name

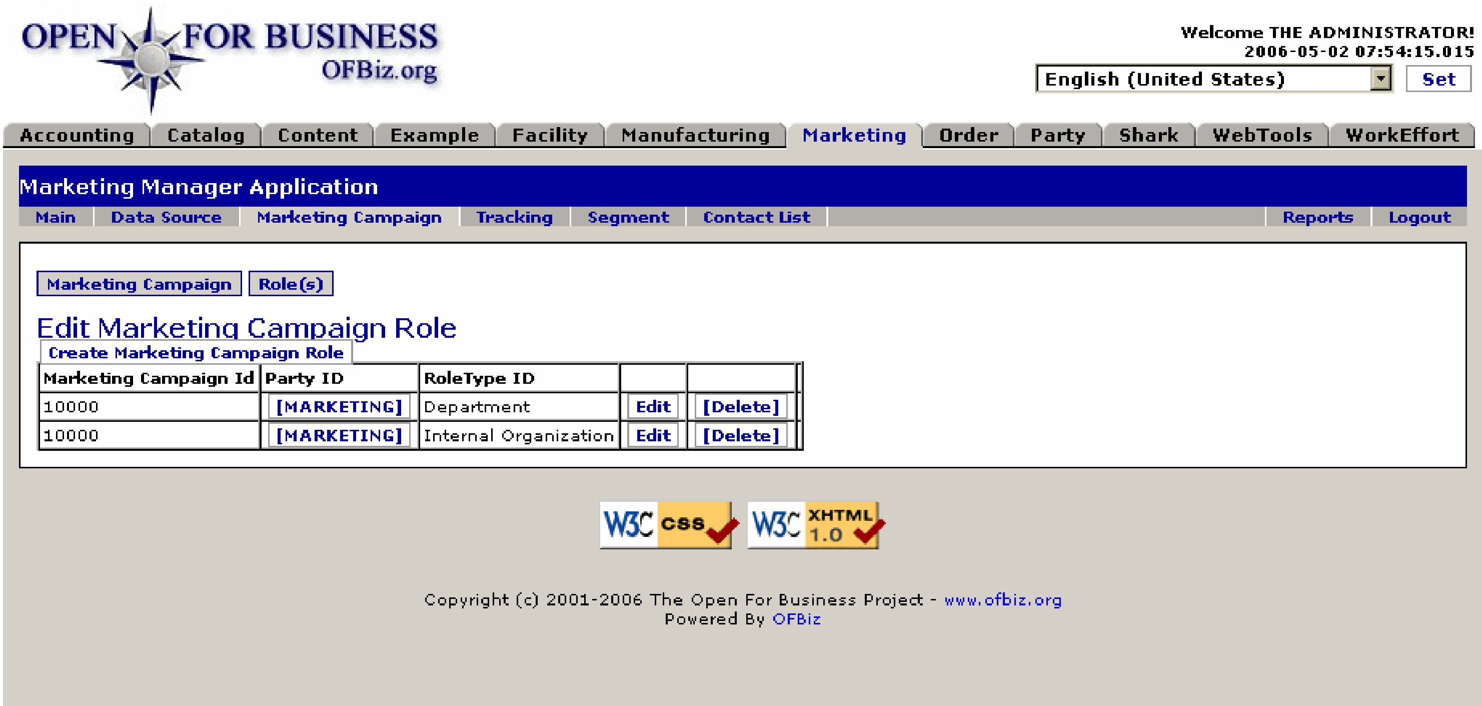
Give the Campaign a name which will differentiate it from other Campaigns.

## .3.4.2.5 Campaign Summary

Summarize the target, method and aims of the Campaign in this box.

## .3.5 Roles

### .3.5.1 FindMarketingCampaignRoles




Roles for the selected Campaign are listed here. Click [Edit] to change or Delete to remove.

### .3.5.2 link buttons

[Create Marketing Campaign Role] [Edit] [Delete] [Marketing Campaign] [Roles]

### .3.5.3 Table of existing roles

## .3.5.3.1 Marketing Campaign ID

The number assigned to identify the Marketing Campaign.

### .3.5.3.2 Party ID

Party assigned to a role in this Campaign.

### .3.5.3.3 Role Type

The Role played by the Party in this Campaign.

## .3.5.4 Tool to add Party in a Role

### .3.5.4.1 EditMarketingCampaignRoles


Add a Party in a Role to this Marketing Campaign. You come to the same screen to Edit the Role.

### .3.5.4.2 link buttons

[Create Marketing Campaign Role] [Save] [Cancel / Done] [Marketing Campaign] [Role(s)]

## .3.5.4.3 Marketing Campaign ID

The assigned number ID for the Marketing Campaign to which you are adding Role assignments.

## .3.5.4.4 Party ID (popup search tool)

Use the popup or enter the Party ID for each Party to be associated with this Campaign.

## .3.5.4.5 Role Type (drop-down box)

Use the drop-down box to select the appropriate Role for the Party to play with this Campaign.

# .4 Tracking

## .4.1 FindTrackingCode

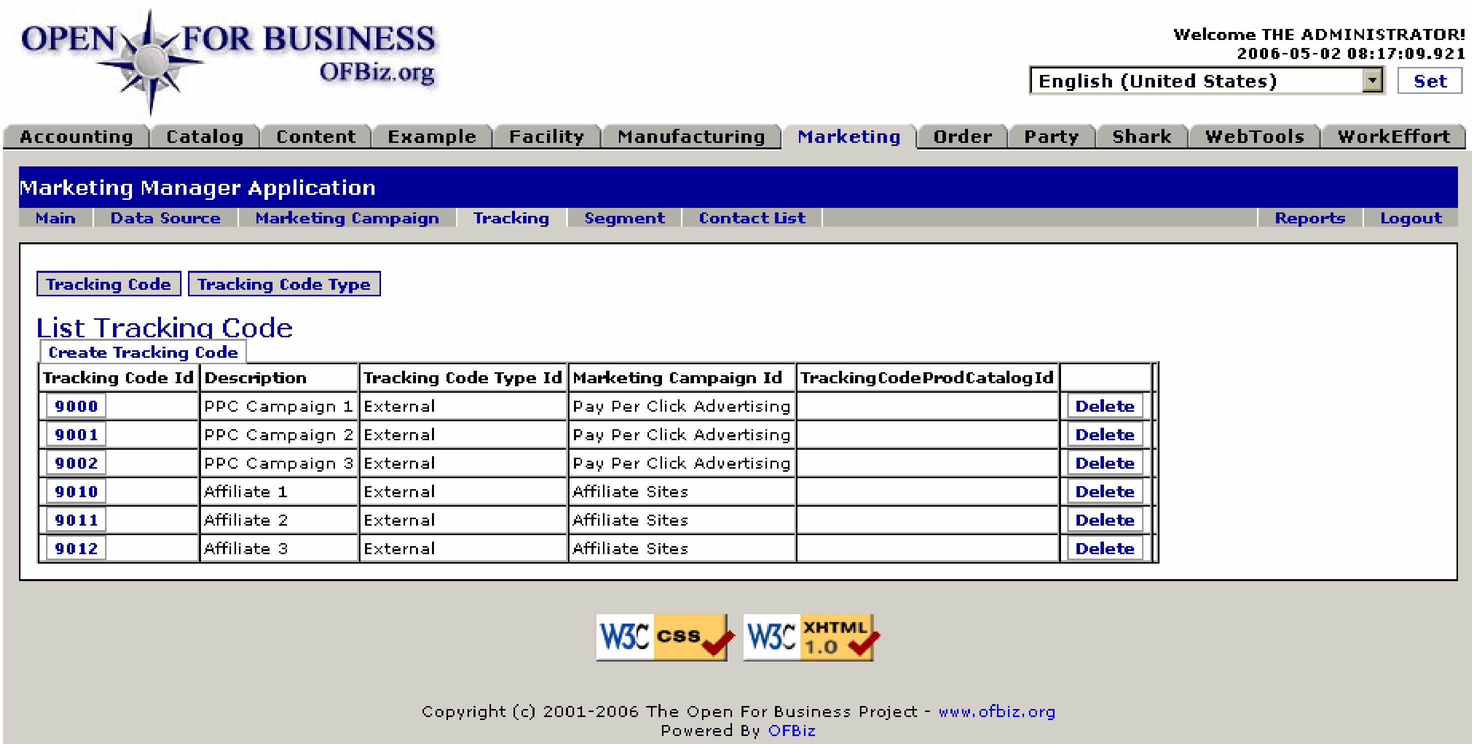



Table with all current Tracking Codes. Click on the Tracking Code ID to view or edit.

## .4.2 link buttons

[Create New TrackingCodeType] [Delete] [Tracking Code] [Tracking Code Type]

## .4.3 Tracking Codes List

### .4.3.1 ID

The ID assigned when the Tracking Code was created.

### .4.3.2 Type

This could be Internal, External, or Partner Managed.

### .4.3.3 Description

The explicit description of what this Code identifies.

### .4.3.4 Campaign

Which Marketing Campaign this Tracking Code is associated with.

## .4.4 Tracking Code Type

### .4.4.1 FindTrackingCodeType


Table of current Tracking Code Types. Click on the ID to edit.

### .4.4.2 link buttons

[Create Tracking Code Type] [Delete] [Tracking Code] [Tracking Code Type]

### .4.4.3 Tracking Code Type ID

Click on the ID (name) to edit.

### .4.4.4 Description

One or two words to describe the ID Type.

## .4.4.5 Edit or Create New Tracking Code Type

### .4.4.5.1 EditTrackingCodeType


When creating a new Type ID, you specify the ID; when editing, only the Description can be changed.

### .4.4.5.2 link buttons

[Create Tracking Code Type] [Save] [Tracking Code] [Tracking Code Type]

### .4.4.5.3 Tracking Code Type ID

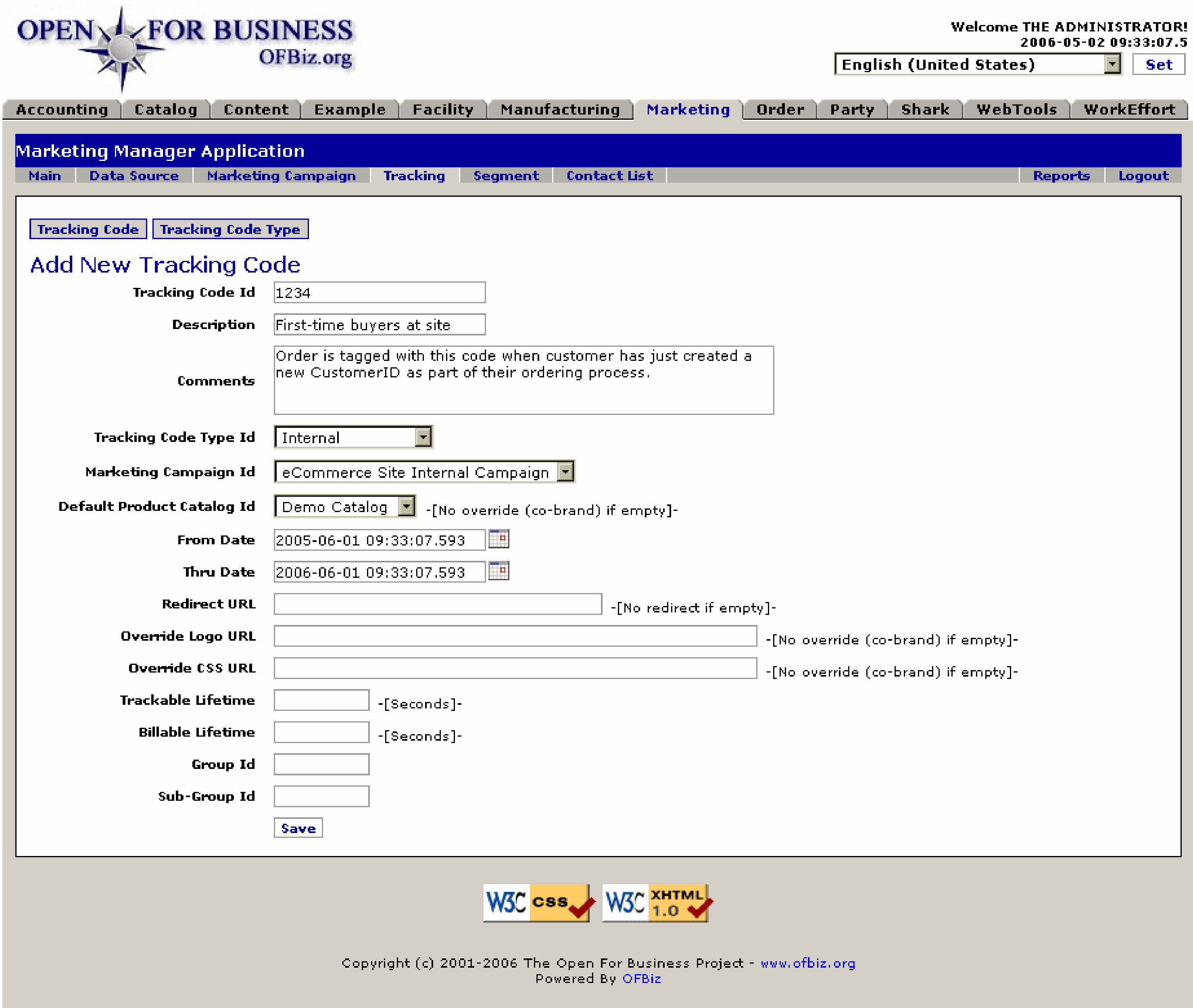
Tracking Code Type ID is created by you here when the Type is new; if editing, you cannot change this.

### .4.4.5.4 Description

What the Type is for or about.

## .4.5 New TrackingCode

### .4.5.1 EditTrackingCode-new




A new Tracking Code is begun here. Specify what you know at the time; editing will finish the task later.

### .4.5.2 link buttons

[Save] [Tracking Code] [Tracking Code Type]

### .4.5.3 TrackingCode ID

Whatever you enter here will be assigned as the TrackingCode ID.

If this same code is needed by the customer to qualify for a promotion, make it easy for them to use.

### .4.5.4 Description

The explicit description of what this Code identifies. One or two words is best.

### .4.5.5 Comments

Whatever details you need to pass on to others or to remind yourself can be recorded here. This will not be seen by the customers.

### .4.5.6 TrackingCode Type (drop-down box)

Select from one of these options:

- Internal
- External
- Partner Managed

### .4.5.7 Marketing Campaign ID (drop-down box)

Associate this Tracking Code with a Marketing Campaign by selecting it from the drop-down box.

The same Code could be used in more than one Marketing Campaign.

### .4.5.8 Default Product Catalog ID

(No override (co-brand) if empty) means that, if you wish to co-brand, you need to enter the default Catalog ID here.

### .4.5.9 From Date/Time (popup calendar)

Date/Time must be in format '2006-03-02 08:00:00.0'. This should be the time of effectivity for the Tracking Code, not just the time when this code is created.

In other words, if the Tracking Code is a metric for the performance of the Marketing Campaign, the Campaign itself has a beginning and an ending. The effectivity of the Tracking Code should properly reflect the corresponding time frame.

## .4.5.10 Thru Date/Time (popup calendar)

Date/Time must be in format '2006-06-05 23:59:59.9'. This will be the expiration date and time for the Tracking Code.

In other words, if an event is recorded with this Tracking Code after this time, it will be outside the period of performance and will not be measured in the results of the campaign.

## .4.5.11 Redirect URL

'(No redirect if empty)' means that if you wish to redirect your customer with this Tracking Code, you must enter the Redirect URL here.

## .4.5.12 Override Log URL

(No override (co-brand) if empty) means that, if you wish to co-brand, you need to enter the URL here.

## .4.5.13 Override CSS URL

(No override (co-brand) if empty) means that, if you wish to co-brand, you need to enter the URL here.

## .4.5.14 Trackable Lifetime

How many seconds of presence will you need to record.

## .4.5.15 Billable Lifetime

How many seconds of billable time is needed.

## .4.5.16 Group ID

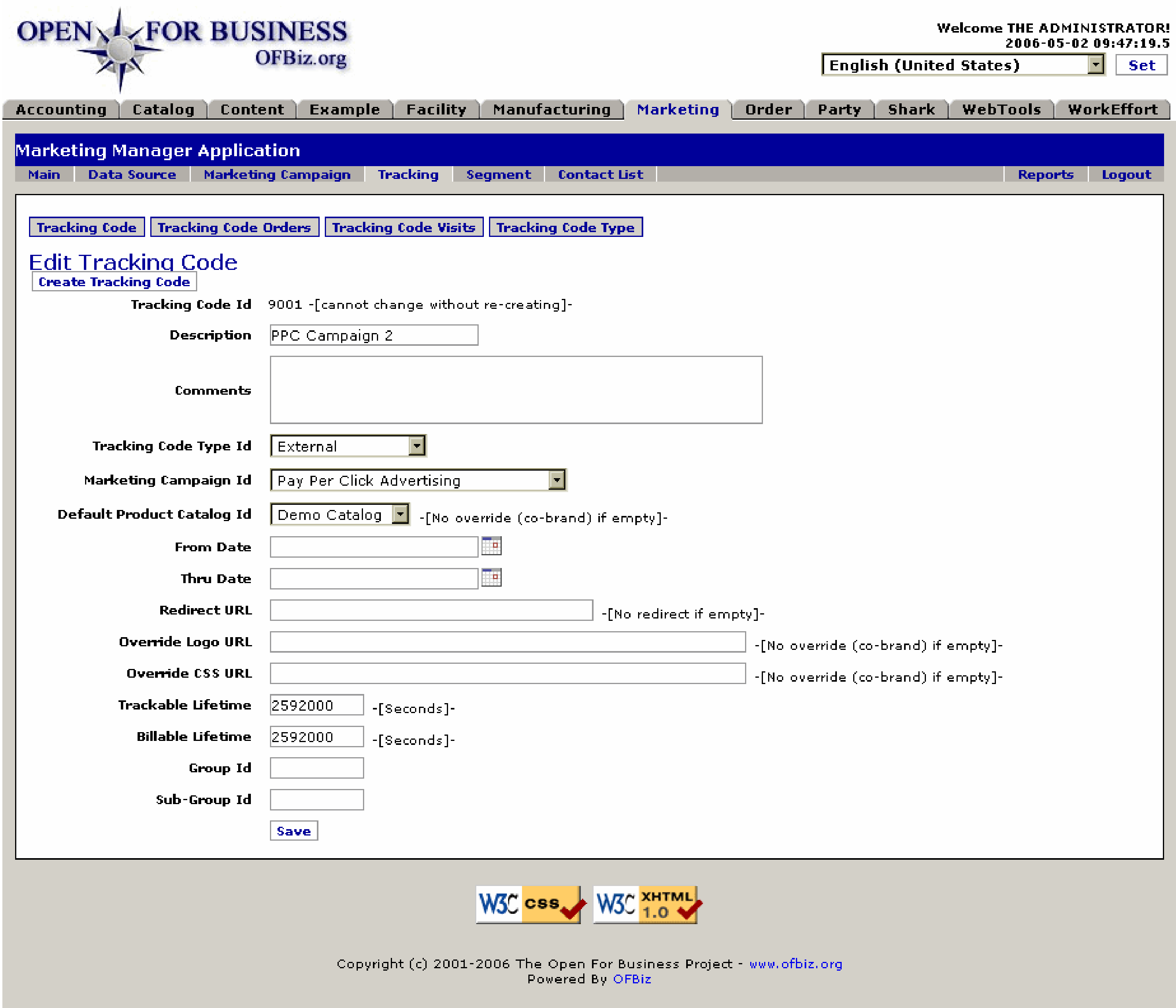
If there is an associated Group, enter its ID here.

## .4.5.17 Sub-Group ID

If there is an associated Sub-Group, enter its ID here.

## .4.6 Tracking Code

### .4.6.1 EditTrackingCode




When an existing Tracking Code is selected for view or edit, this screen provides the tools and presents the data.

### .4.6.2 link buttons

[Create Tracking Code] [Save] [Tracking Code] [Tracking Code Orders] [Tracking Code Visits] [Tracking Code Type ]

## .4.6.3 Discussion

Similar to New Tracking Code, discussed above, except the link buttons are here for [Tracking Code Orders] and [Tracking Code Visits] as well. The fields are the same as described above; please see the information you need there.

# .4.7 Tracking Code Orders

## .4.7.1 FindTrackingCodeOrders


When the Tracking Code is associated with the Order Process, all orders where it was used will be reported here.

## .4.7.2 link buttons

[View] [Tracking Code] [Tracking Code Orders] [Tracking Code Visits] [Tracking Code Type ]

## .4.7.3 Tracking Code ID

Click on the ID to view or edit.

## .4.7.4 Order ID

Click on the ID number to view the Order.

## .4.7.5 TrackingCode Type ID

Was this an Internal, External or Partner Managed Tracking Code Type.

## .4.7.6 Is Billable

Yes or No - do we owe somebody for referring this customer or this purchase to us?

# .4.8 Tracking Code Visits

## .4.8.1 FindTrackingCodeVisits


Table with all Visits that can be related to the selected Tracking Code; click the Visit ID to view details of the Visit.

## .4.8.2 link buttons

[View] [Tracking Code] [Tracking Code Orders] [Tracking Code Visits] [Tracking Code Type ]

## .4.8.3 Visit ID

The system assigns a Visit ID to every access of the ecommerce server. Click on this ID number to learn about the Party whose visit created the event.

### .4.8.4 Source ID

What directed or provided the path for the Visit by this Party to this specific page in your Catalog?

### .4.8.5 From Date

This gives you the Time that the Visit began. You can determine how long the visit lasted by viewing the Visit ID.

## .4.9 Tracking Code Type

Previously discussed, above.

# .5 Segment

## .5.1 Find

### .5.1.1 FindSegmentGroup


Identify an existing Segment Group from this table. Click the ID number to edit or view.

### .5.1.2 link buttons

[Create New Segment Group] [Delete]

### .5.1.3 Segment Group ID

Click on this to edit.

### .5.1.4 Segment Group Type ID

Which type of segment is this one a part of.

### .5.1.5 Description

Defines this Group over all others.

### .5.1.6 Product Store ID

Which of your Stores is this Segment associated with.

# .5.2 Segment

## .5.2.1 viewSegmentGroup


View or edit the Segment Group here. You cannot change the Segment Group ID, but anything else can be modified.

## .5.2.2 link buttons

[Create New Segment Group] [Save] [Segment] [Classification] [Geo] [Role]

## .5.2.3 Segment Group ID

Assigned when the Segment Group was created. This cannot be changed.

## .5.2.4 Segment Group Type ID (drop-down box)

For example, the Sales Segment, the Market Segment, the ecommerce segment, the Retail Outlet Segment, etc.

Whatever major Segment types have already been identified in the system will be listed in the drop-down box.

### .5.2.5 Catalog Product Store (popup search tool)

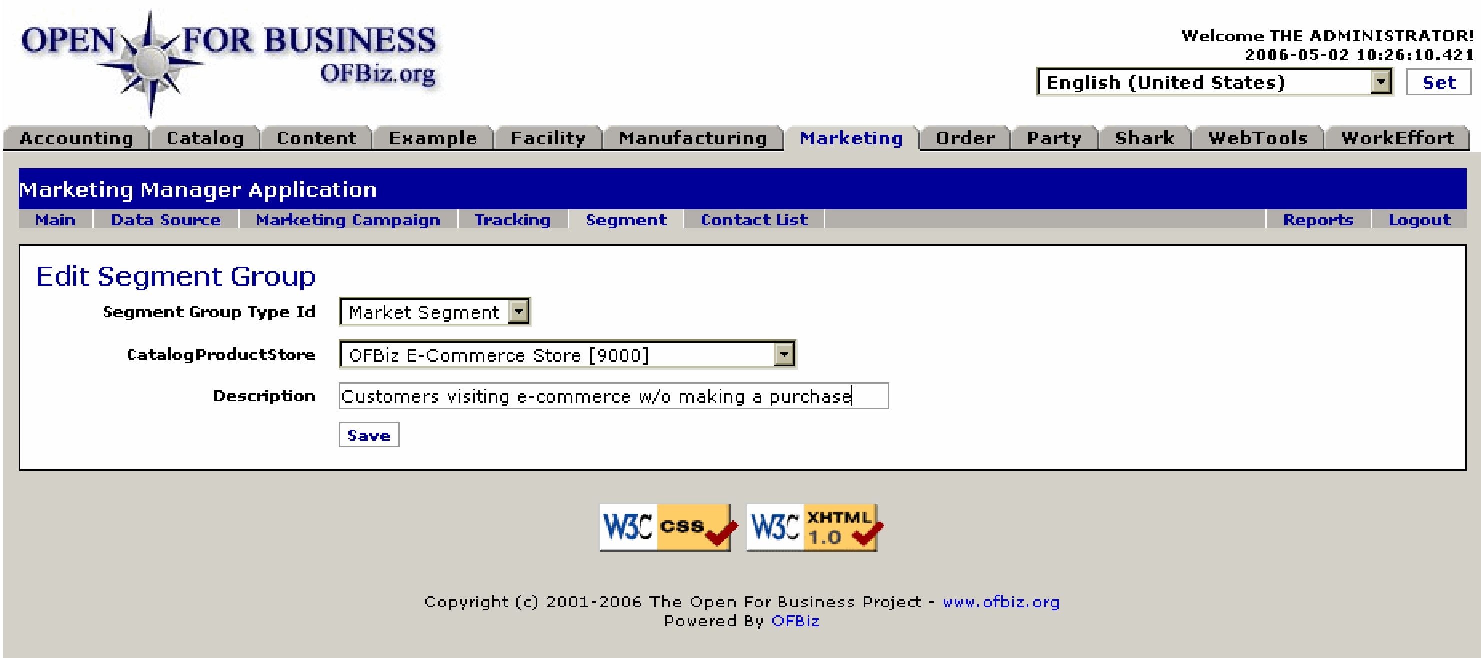
The Store associated with this Segment. Select from the drop-down box.

### .5.2.6 Description

How this Segment is differentiated from all others.

### .5.2.7 Create New Segment Group

#### .5.2.7.1 viewSegmentGroup-new




Creating a new Segment Group is simplified with drop-down boxes to help make the selections.

#### .5.2.7.2 link buttons

[Save]

#### .5.2.7.3 Segment Group Type ID (drop-down box)

Select from the drop-down box.

## .5.2.7.4 Product Store ID (drop-down box)

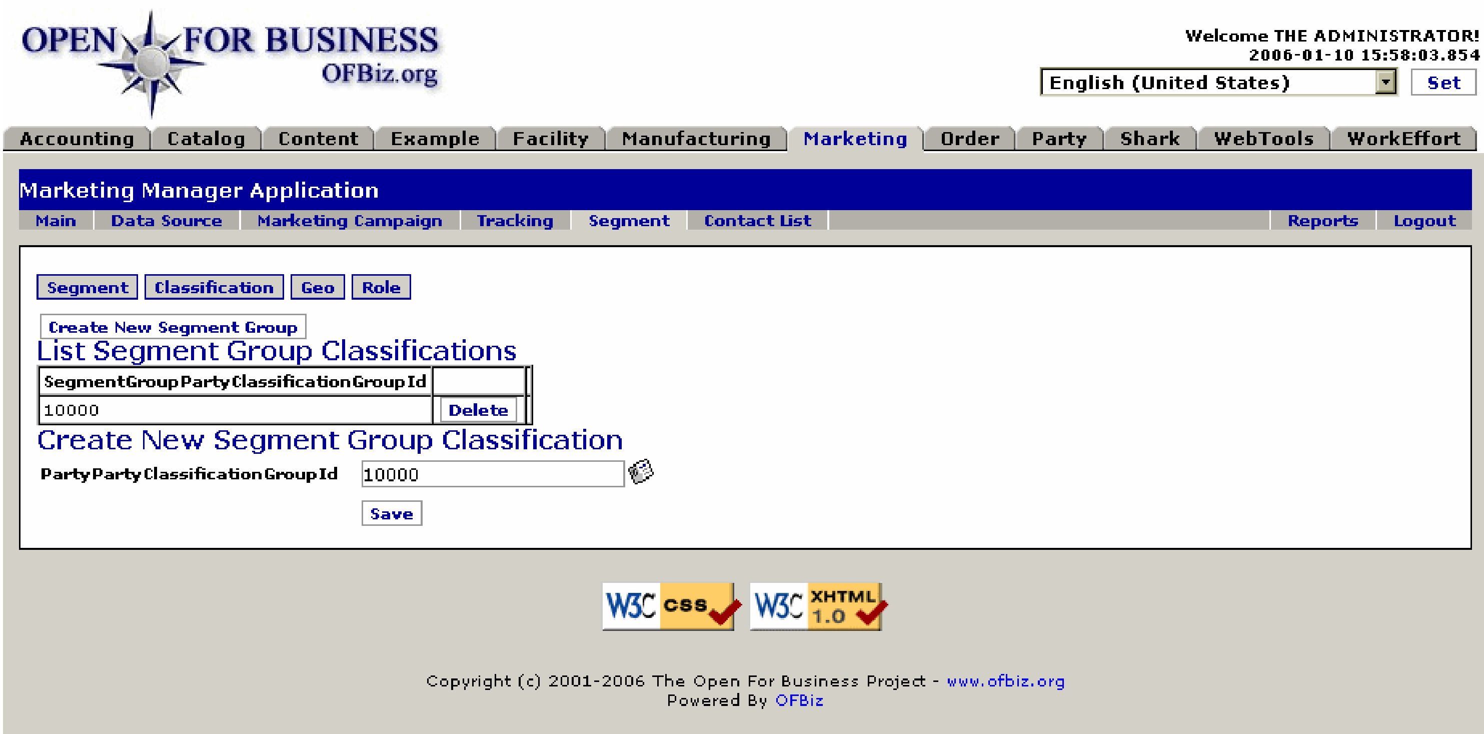
Select from the drop-down box.

## .5.2.7.5 Contact List Description

How this Segment Group is differentiated from all others.

# .5.3 Classification

## .5.3.1 listSegmentGroupClass




A Segment Group's association with an existing Classification is listed here. Classification Groups are created in the Party Mgr.

## .5.3.2 link buttons

[Create New Segment Group Classification] [Delete] [Save] [Find] [Segment] [Classification] [Geo] [Role]

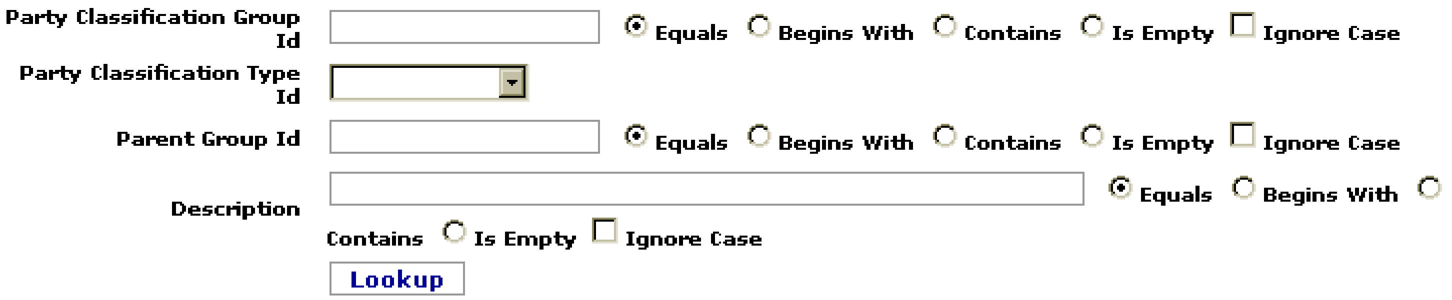
### .5.3.3 SegmentGroup PartyClassificationGroupId

The Classification Group to which this Segment has been assigned. In this example pictured here, '10000' equates to a Parent Group - 'Internet Marketing.'

### .5.3.4 PartyParty ClassificationGroupID (popup search tool)

Select an existing Party Classification Group from the popup search tool.

### .5.3.5 lookupPartyClassificationGroup




| | Party Classification Type Id | Parent Group Id | Description |
|---|---|---|---|
| 10000 | ORGANIZATION_CLASSIF | 10000 | Internet Marketing |
| 10002 | PERSON_CLASSIFICATIO | | Those Persons who are customers. |
| 10010 | PERSON_CLASSIFICATIO | 10002 | Those persons who are both Employees and Customers |
| 10001 | PERSON_CLASSIFICATIO | 10002 | Those persons who are customers but not employees. |

Use the popup to find an existing Party Classification Group; these are created in the Party manager.

## .5.4 Geo

### .5.4.1 listSegmentGroupGeo


Geographical areas assigned to an existing Segment Group are listed here.

### .5.4.2 link buttons

[Create New Segment Group] [Delete] [Save] [Segment] [Classification] [Geo] [Role]

### .5.4.3 Geo ID

This is the geographical area as selected from the lookup tool, below.

### .5.4.4 Edit Segment Group Geo

#### .5.4.4.1 CommonGeoID (popup search tool)

Use the popup to identify the Geographical Area within which the Segment is based.

## .5.4.4.2 Common Geo ID

Use the popup tool to locate the code for the geographical area, typically by country. Hint: just enter USA or your state or country name in the Geo ID field of the lookup tool and check 'Ignore Case;' it should work!

## .5.4.4.3 lookupGeo

Geo ID [ ] Equals Begins With Contains Is Empty Ignore Case

Geo Type ID [ ]

Name [ ] Equals Begins With Contains Is Empty Ignore Case

Code [ ] Equals Begins With Contains Is Empty Ignore Case

Secondary Code [ ] Equals Begins With Contains Is Empty Ignore Case

Abbreviation [ ] Equals Begins With Contains Is Empty Ignore Case

Lookup

| Geo ID | Geo Type ID | Name | Code | Secondary Code | Abbreviation |
|---|---|---|---|---|---|
| BR-AC | State | Acre | AC | | |
| AFG | Country | Afghanistan | AF | 004 | |
| IT-AG | Province | Agrigento | AG | | |
| AL | State | Alabama | AL | | |
| BR-AL | State | Alagoas | AL | | |
| AK | State | Alaska | AK | | |
| AKHI | Group | Alaska/Hawaii | AKHI | | |
| AHUST | Group | Alaska/Hawaii/Territories | AHUST | | |
| ALB | Country | Albania | AL | 008 | |
| AB | Province | Alberta | AB | | |
| IT-AL | Province | Alessandria | AL | | |
| DZA | Country | Algeria | DZ | 012 | |
| BR-AP | State | Amapá | AP | | |
| BR-AM | State | Amazonas | AM | | |
| AS | State | American Samoa | AS | | |
| ASM | Country | American Samoa | AS | 016 | |
| IT-AN | Province | Ancona | AN | | |
| AND | Country | Andorra | AD | 020 | |
| AGO | Country | Angola | AO | 024 | |
| AIA | Country | Anguilla | AI | 660 | |

1 - 20 of 463 Next

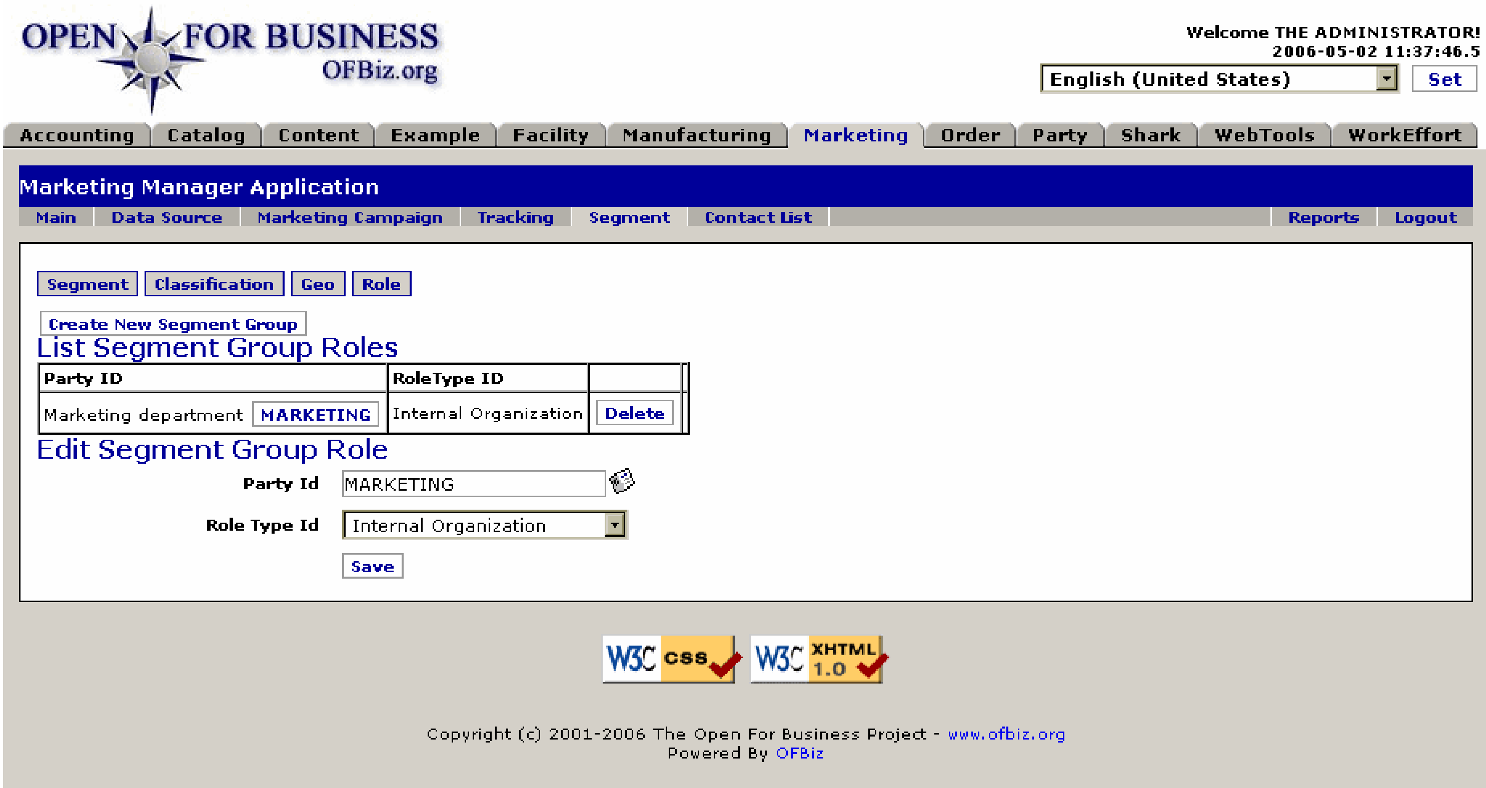
Lookup the Geographical boundaries of this Segment Group here.

### .5.4.4.4 link buttons

[Lookup]

## .5.5 Role

### .5.5.1 listSegmentGroupRole




Roles of a Party or Party Group for the Segment Group are listed, deleted and added here.

### .5.5.2 link buttons

[Create New Segment Group] [Delete] [Save] [Segment] [Classification] [Geo] [Role]

### .5.5.3 Party ID

Click on this to Edit the Party in the Party Manager.

### .5.5.4 Role Type ID

The assigned Role Type for this Party within the Group Segment.

### .5.5.5 Edit Segment Group Role

#### .5.5.5.1 Party ID

Enter if known or use the popup search tool.

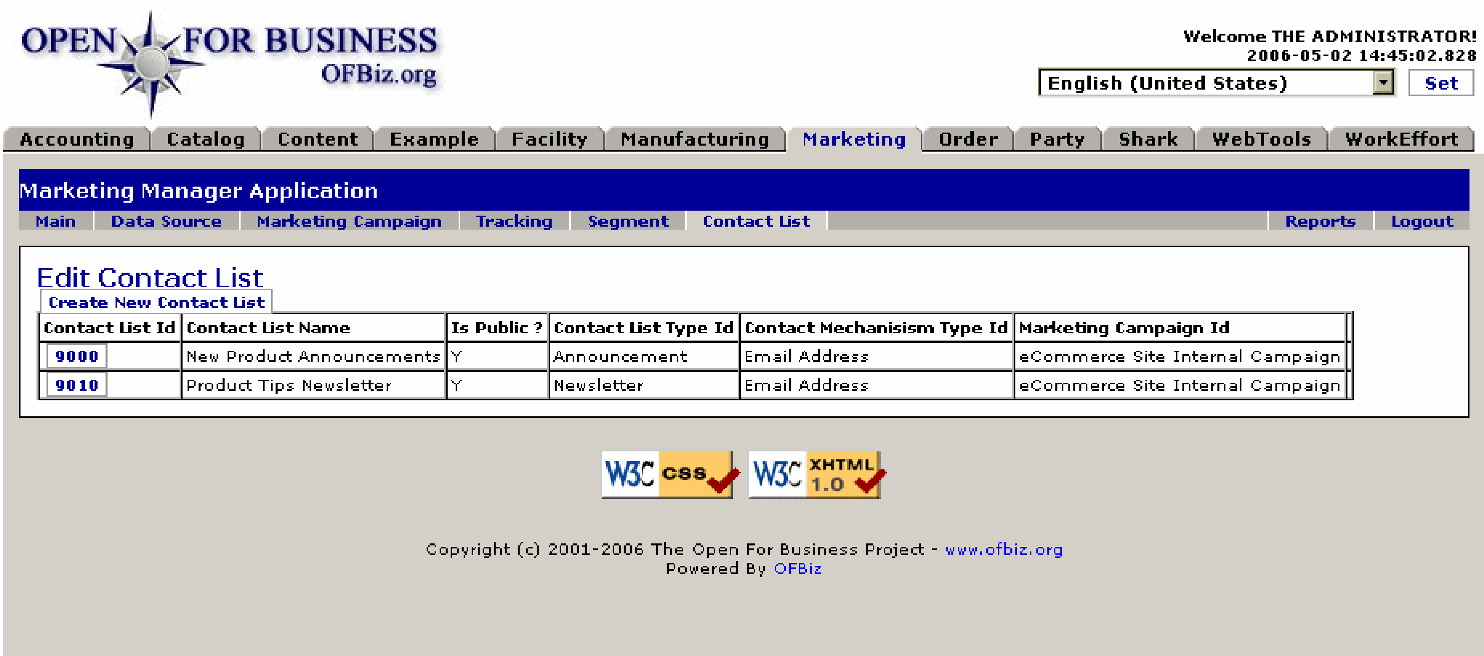
#### .5.5.5.2 Role Type ID (drop-down list)

Select from the drop-down list.

## .6 Contact List

### .6.1 Find Contact List

### .6.1.1 ListContactLists




When you first select the Contact List tab, this table of existing Contact Lists appears; click a Contact List ID to view or edit.

### .6.1.2 link buttons

[Create New Contact List]

### .6.1.3 Contact List ID

Click on this number to view or edit.

### .6.1.4 Contact List Name

The name by which you know the List.

### .6.1.5 Is Public?

Can the information be divulged to others?

### .6.1.6 Contact List Type ID

Whether this is for marketing, a newsletter, announcements, etc.

### .6.1.7 Contact Mech Type ID

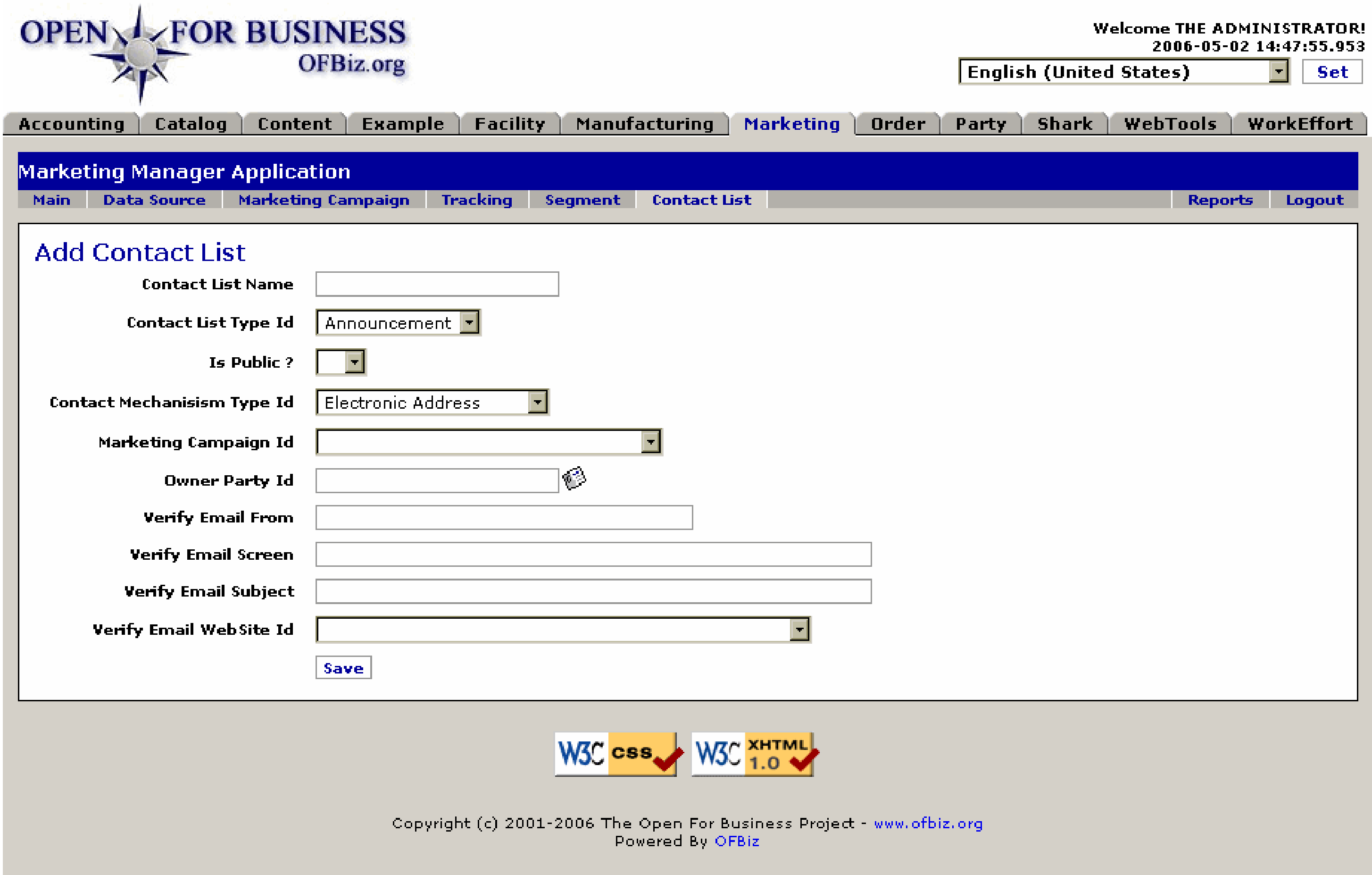
Do you reach them by email, phone, postal mail, etc.

### .6.1.8 Marketing Campaign ID

Which Marketing Campaign this list is associated with.

## .6.2 Add a new Contact List

### .6.2.1 EditContactList-new




Create a new Contact List from this screen. Enter what you know now; complete it later in the Edit screen.

### .6.2.2 link buttons

[Save]

### .6.2.3 Contact List Name

The name by which you know the List.

### .6.2.4 Contact List Type ID (drop-down box)

Is this an Announcement, a Marketing mailing, a Newsletter, or something else? Select from the drop-down box.

### .6.2.5 Is Public? (Y/N)

Can the information be divulged to others?

### .6.2.6 Contact Mechanism Type ID (drop-down box)

Which of the registered Contact Mechanisms for the Parties will be used to reach the recipient?

Select from the drop-down list which includes:

- Electronic Address
- Email Address
- Internet Domain Name
- Internet IP Address
- Phone Number
- Postal Address
- Web/URL Address

### .6.2.7 Marketing Campaign ID (drop-down list)

Which Marketing Campaign is this Contact List associated with? All of the existing Marketing Campaigns are given on the drop-down list.

### .6.2.8 Owner Party ID (popup search tool)

Enter the Party ID of the person, group or organization responsible for this Contact List. Use the popup search tool if needed.

### .6.2.9 Verify Email From

When the Communication is by email, what is the email address where you will receive a copy (BCC) of the communication to verify that the transmission was successful?

### .6.2.10 Verify Email Screen

When the Communication is by email, what is the electronic address of the screen where you will verify that the transmission was successful?

### .6.2.11 Verify Email Subject

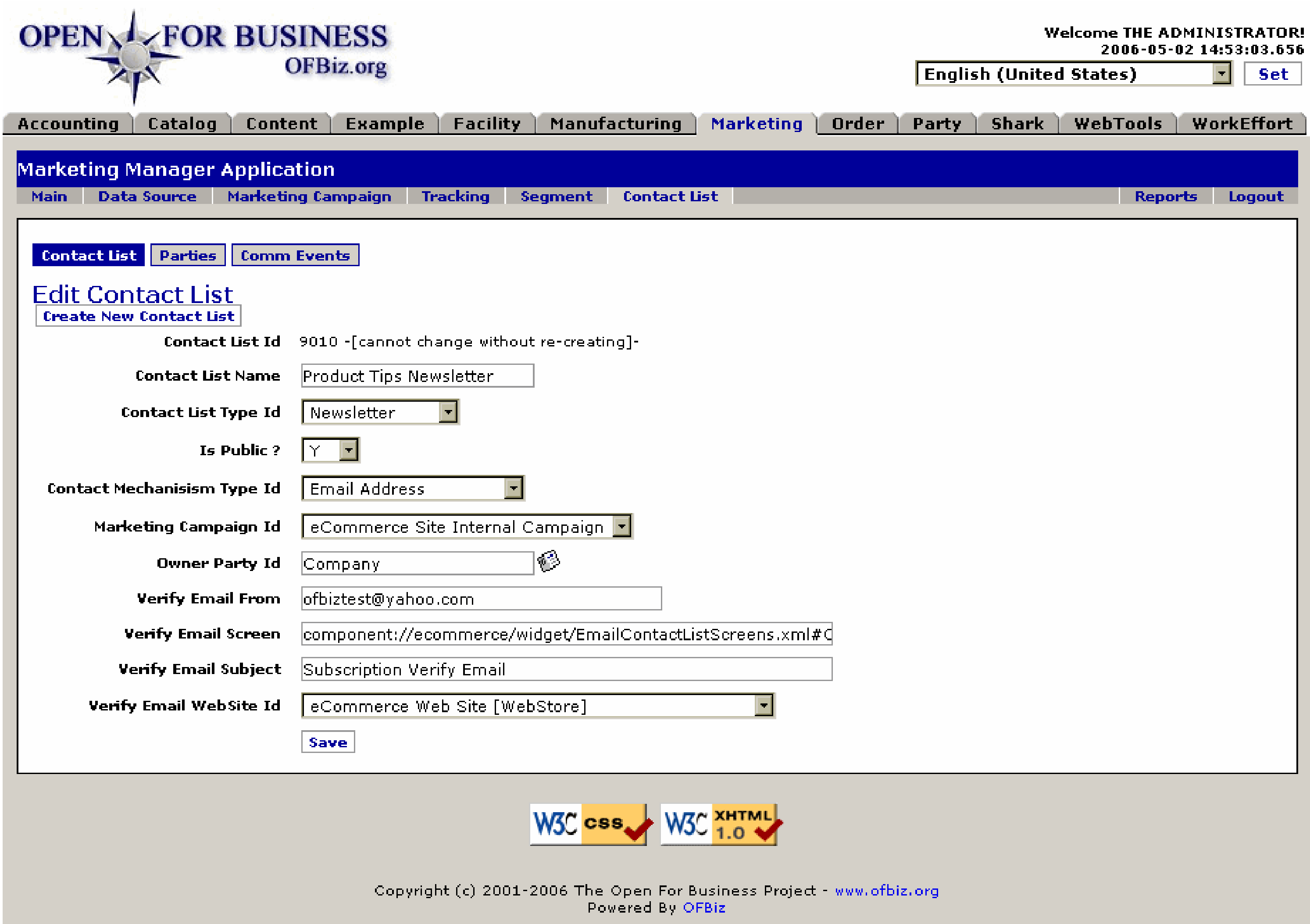
When the Communication is by email, what is the subject of the message used when you will verify that the transmission was successful?

### .6.2.12 Verify Email WebSite ID

When the Communication is by email, what is the Objective WebSite to which they will be directed?

## .6.3 Edit Contact List

### .6.3.1 EditContactList




Edit an existing Contact List from this screen. Follow the tabs for more options.

### .6.3.2 link buttons

[Save] [Create New Contact List] [Contact List] [Parties] [Comm Events]

### .6.3.3 Contact List ID

Cannot be changed.

### .6.3.4 Contact List Name

The name by which you know the List.

### .6.3.5 Contact List Type ID (drop-down box)

Is this an Announcement, a Marketing mailing, a Newsletter, or something else? Select from the drop-down box.

### .6.3.6 Is public? (Y/N)

Can the information be divulged to others?

### .6.3.7 Contact Mechanism Type ID (drop-down box)

Which of the registered Contact Mechanisms for the Parties will be used to reach the recipient?

Select from the drop-down list which includes:

- Electronic Address
- Email Address
- Internet Domain Name
- Internet IP Address
- Phone Number
- Postal Address
- Web/URL Address

### .6.3.8 Marketing Campaign ID (drop-down box)

Which Marketing Campaign is this Contact List associated with?

### .6.3.9 Owner Party ID (popup search tool)

Enter the Party ID of the person, group or organization responsible for this Contact List. Use the popup search tool if needed.

### .6.3.10 Verify Email From

When the Communication is by email, what is the email address where you will receive a copy (BCC) of the communication to verify that the transmission was successful?

### .6.3.11 Verify Email Screen

When the Communication is by email, what is the electronic address of the screen where you will verify that the transmission was successful?

### .6.3.12 Verify Email Subject

When the Communication is by email, what is the subject of the message used when you will verify that the transmission was successful?

### .6.3.13 Verify Email WebSite ID (drop-down box)

When the Communication is by email, what is the Objective WebSite to which they will be directed?

# .6.4 Parties

## .6.4.1 Find ContactList Party

### .6.4.1.1 FindContactListParties


Search for an existing Contact List Party from this screen. Specify the List, then enter Party parameters and choose radio buttons.

### .6.4.1.2 link buttons

[Create New Contact List Party] [Find] [Contact List] [Parties] [Comm Events]

### .6.4.1.3 Contact List ID

The number established by the system when the Contact List was created. This is all you really need to return the full list.

If you know the number, enter it. If the number was automatically populated from earlier activity, or once the correct number is in this field, click on [Find] and that Contact List will appear with a listing of all the included Parties.

To narrow your search to a specific member of the List, enter data relative to the party's addition to the list. Use the Radio Button search parameters of Equals, Begins With, Contains, or Is Empty to define your entry. Check the box Ignore Case to prevent an entry in UPPER CASE from being rejected as different from a record in lower case.

## .6.4.1.4 Party ID (popup search tool)

Enter the ID of the Party associated with the Contact List if you need to search on this parameter.

## .6.4.1.5 From Date and Thru Date (popup calendars)

Use the popup calendars to bracket the dates when the Contact List was created or scheduled to expire if you need to search on these parameters.

Both the From and the Thru dates each have two popup calendars with these search parameters: Equals, Same Day, Greater Than From Day Start, Greater Than, and the other side with Less Than, Up To Day, Up Thru Day and Is Empty. Use the Radio Buttons together with the 4 calendars to isolate the sought Party by determining when the Party was associated with the Communication Event (the 'From' calendars) or when the association was set to expire (the 'Thru' calendars).

## .6.4.1.6 Status (drop-down box)

Apply the Status of a Contact List Party if that would be useful in your search.

## .6.4.1.7 Preferred Contact Mechanism (popup list)

Use the popup list to enter the Contact Mechanism if that would be useful in your search.

NOTE: You must have already entered a Party ID which has previously-established Contact methods with the Party Manager.

## .6.4.2 List of Parties

### .6.4.2.1 ListContactListParties


Click the [Edit] link to view or edit the Contact List Party.

### .6.4.2.2 link buttons

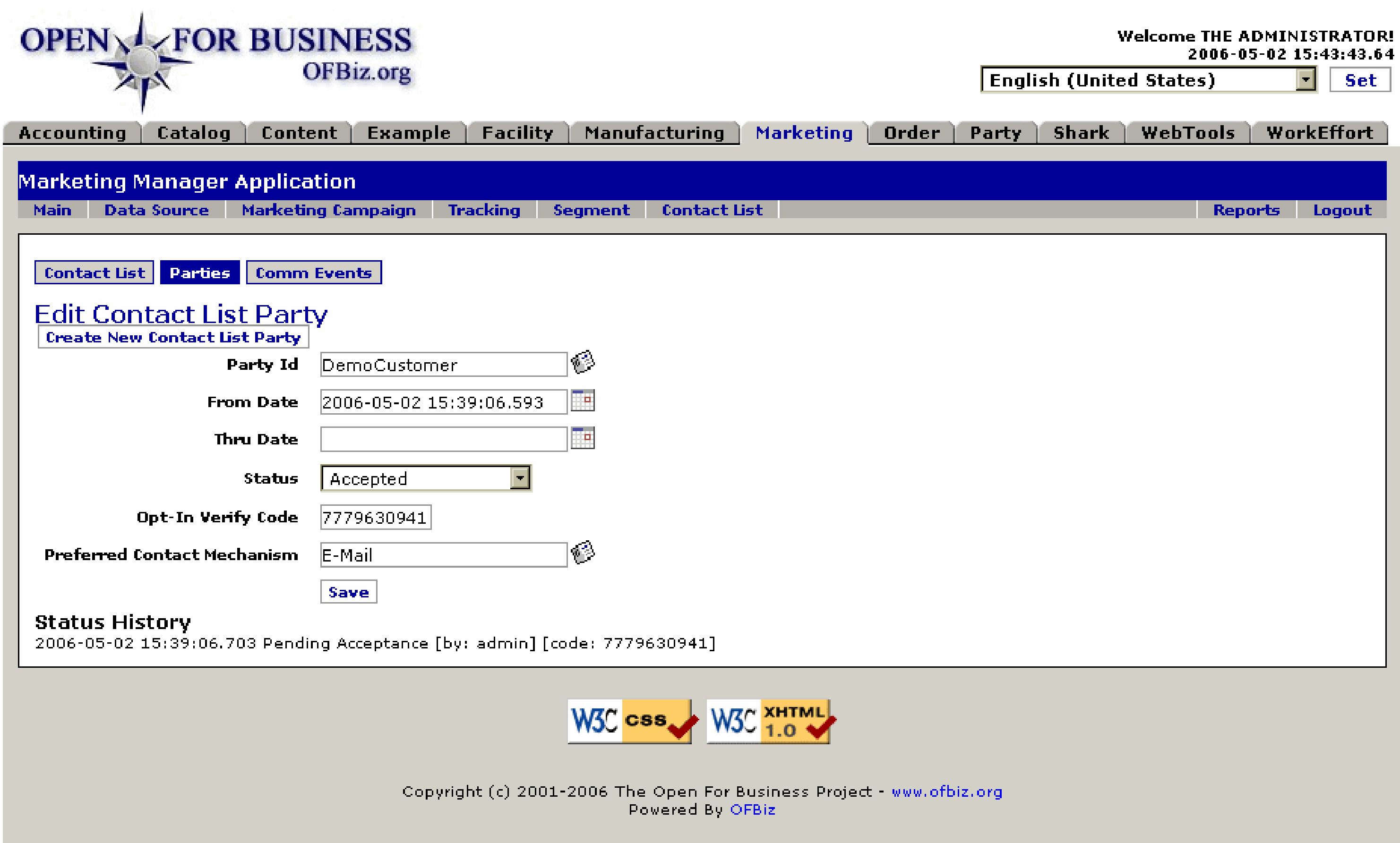
[Edit] [Create New Contact List Party] [Contact List] [Parties] [Comm Events]

### .6.4.2.3 Discussion

The table of established Parties as found when the previous search was performed. See the topics discussed below for an explanation of each of the fields. Click on [Edit] to view or change the details with any Contact List Party.

## .6.4.3 Edit Contact List Party

### .6.4.3.1 EditContactListParty




Edit or Create a new Contact List Party from this screen. The Opt-In Verify Code is mandatory for Acceptance Status change.

### .6.4.3.2 link buttons

[Create New Contact List Party] [Save] [Contact List] [Parties] [Comm Events]

### .6.4.3.3 Party ID (popup search tool)

The Party you wish to have associated with this Contact List. Use the popup search tool to find the Party ID, if needed.

### .6.4.3.4 From Date (popup calendar)

The date this party is associated with this Contact List. Use the popup calendar to assign any date other than Now.

### .6.4.3.5 Thru Date (popup calendar)

If the association of this Party with the Contact List is to expire, this is the date for that expiration.

### .6.4.3.6 Status (dropdown box)

Use the drop-down box to enter a status of the progress of this addition to the Contact List. For the Acceptance status to be allowed, the correct Opt-In code must be given in the next field.

### .6.4.3.7 Opt-In Verify Code

This code is usually required to ensure spamming does not take place.

### .6.4.3.8 Preferred Contact Mechanism

The popup search tool presents all the Contact Mechanisms on record in the Party Manager for this Party ID; select the one preferred for this Contact List.

### .6.4.3.9 Status History

Whenever there is a change in the Status for this Party, the change is reported in this section of the screen.

## .6.5 Comm Events

### .6.5.1 Find Comm Event

#### .6.5.1.1 FindContactListCommEvents


Find existing Comm Events with this tool. Enter just the Contact List ID to return all Events for that List.

#### .6.5.1.2 link buttons

[Create New Contact List Comm Event] [Find] [Contact List] [Party] [Comm Event]

#### .6.5.1.3 Contact List ID

The Table in the following screen will appear with all existing Comm Events associated with this Contact List if you will enter the Contact List ID number and press [Find].

### .6.5.1.4 Communication Event ID (popup search box)

This is what you are really looking for with the rest of the search fields. If you know it or use the popup search tool and enter it here, click [Find] and that Comm Event will appear as in the following table.

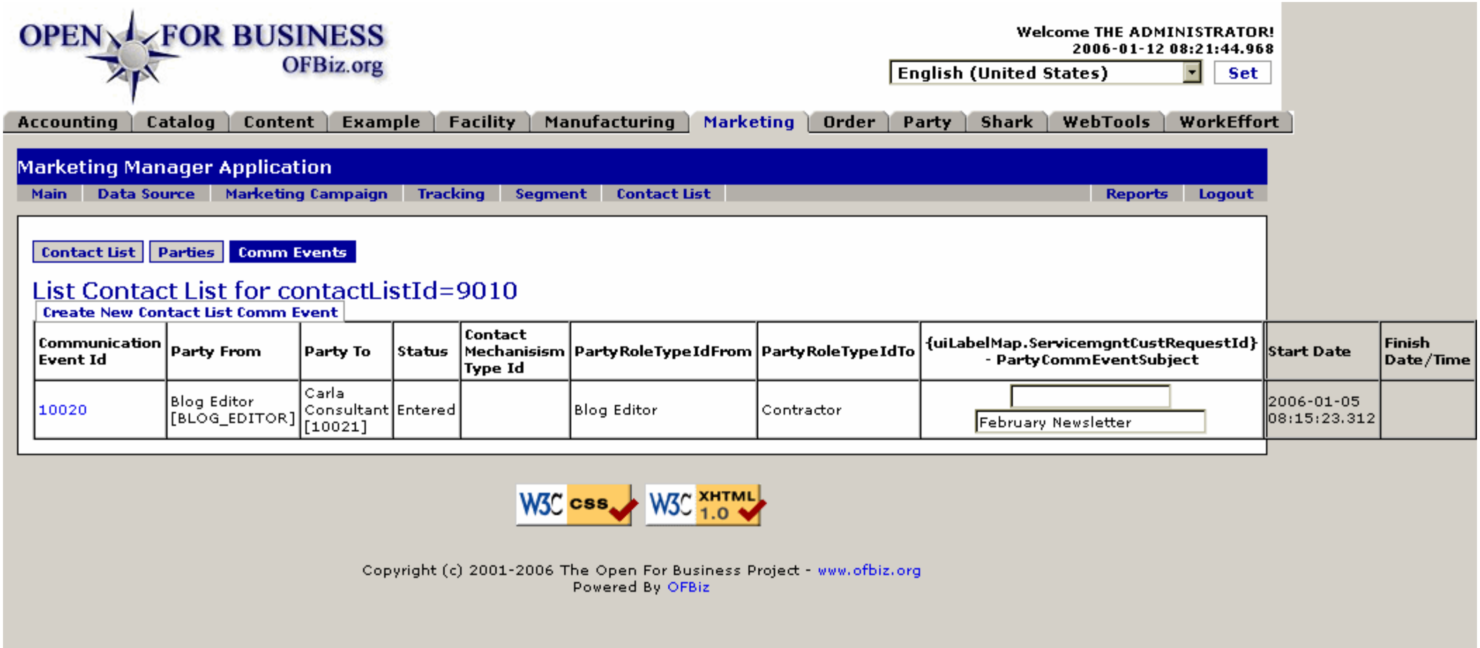
### .6.5.1.5 From and Thru Dates (popup calendars)

Use the popup calendars to bracket the dates when the Comm Event was created or scheduled to expire if you need to search on these parameters.

Both the From and the Thru dates each have two popup calendars with these search parameters: Equals, Same Day, Greater Than From Day Start, Greater Than, and the other side with Less Than, Up To Day, Up Thru Day and Is Empty. Use the Radio Buttons together with the 4 calendars to isolate the sought Event by determining when the Communication Event was created or scheduled (the 'From' calendars) or when the Event was set to expire (the 'Thru' calendars).

## .6.5.2 Contact List Comm Events

### .6.5.2.1 ListContactListCommEvents




An existing Communication Event when selected for the Contact List ID provides much useful information in this table.

### .6.5.2.2 link buttons

[Create New Contact List Comm Event] [Contact List] [Parties] [Comm Events]

### .6.5.2.3 Communication Event ID

Click on the ID number to view or edit.

### .6.5.2.4 Party From

The Party which generated the Comm Event.

### .6.5.2.5 Party To

The recipients of the Comm Event. This could be a Party Group which would include many individual Parties.

### .6.5.2.6 Status

Where is this Comm Event in the sequence of steps? Status might include:

- Entered
- Pending
- Read
- In Progress
- Complete
- Resolved
- Referred
- Cancelled

### .6.5.2.7 Contact Mechanism Type ID

Which method of communication was used in this event? This could be email, postal, telephone, fax, etc.

### .6.5.2.8 Party Role Type ID From

When the Party originated the Comm Event, what was their Role Type at the time? Was it Marketing acting as a Department, the person in charge of the WebSite acting as Blog Editor, etc.

### .6.5.2.9 Party Role Type ID To

When the Communication was transmited, what was the Role Type of the recipients at the time? Were they Customers, Employees, Supervisors, Blog Users, what?

### .6.5.2.10 {uiLabelMap.ServicemgntCustRequestId}

{uiLabelMap.ServicemgntCustRequestId} is not yet defined.

### .6.5.2.11 PartyCommEventSubject

The Subject of this Communication to the Party.

### .6.5.2.12 Start Date

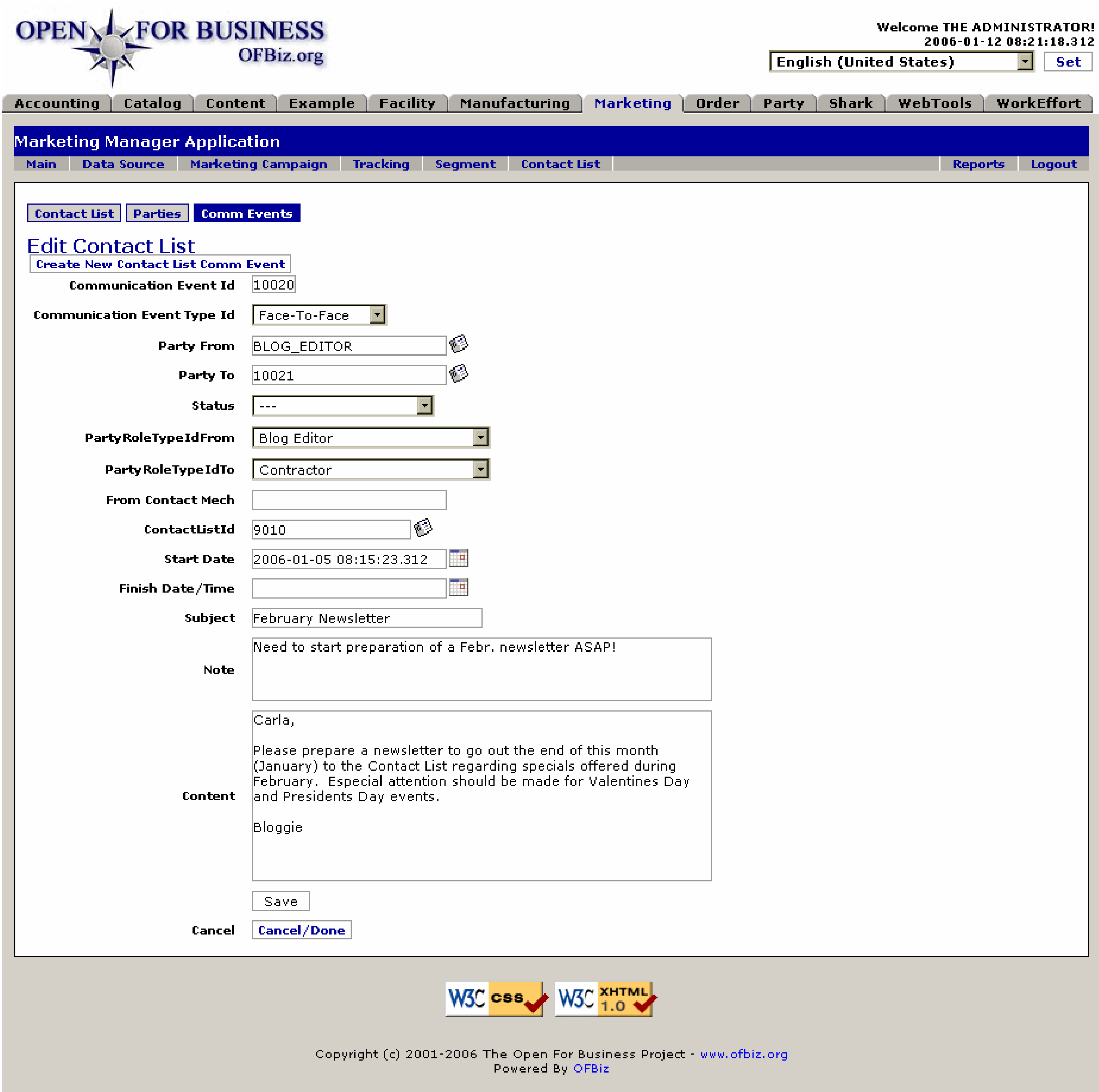
Either the date of origin for this Communication, or the beginning of a period of time during which something is effective, such as a Promotion Start Date.

### .6.5.2.13 Finish Date / Time

When does this Event end, conclude, become invalid or expire?

## .6.5.3 Create new or Edit Comm Event

### .6.5.3.1 EditContactListCommEvent




Edit or create a new Contact List Comm Event from this screen.

### .6.5.3.2 link buttons

[Create New Contact List Comm Event] [Save] [Cancel / Done] [Contact List] [Parties] [Comm Events]

### .6.5.3.3 Communication Event ID

This assigned ID does not appear when creating, only after it is generated when the new Event is saved. You cannot change this ID, and you cannot bring up another by entering that number here.

### .6.5.3.4 Communication Event Type ID (drop-down box)

What is the venue or format? Mail? Email? Phone? Select from the drop-down box.

### .6.5.3.5 Party From (popup search tool)

Who (which Party) originated or sponsored this Communication? Either enter the Party ID accurately or select from the popup search tool.

### .6.5.3.6 Party To (popup search tool)

Who (which Party) is the target recipient(s) of this Communication? Either enter the Party ID accurately or select from the popup search tool.

### .6.5.3.7 Status (drop-down box)

Where is this Comm Event in the sequence of steps? When creating a new Event, you would probably use Entered or Pending.

When Editing an Event later on, status might include:

- Entered
- Pending
- Read
- In Progress
- Complete
- Resolved
- Referred
- Cancelled

### .6.5.3.8 Party Role Type ID From

When the Party originated the Comm Event, what was their Role Type at the time? Was it Marketing acting as a Department, the person in charge of the WebSite acting as Blog Editor, etc.

### .6.5.3.9 Party Role Type ID To (drop-down box)

When the Communication was transmited, what was anticipated Role Type of the recipients at the time? Were they addressed as Customers, Employees, Supervisors, Blog Users, what?

### .6.5.3.10 Contact List ID (popup search tool)

If this has not populated automatically, and if you do not know what the List ID is, use the popup search tool to identify it.

### .6.5.3.11 Start Date (popup calendar)

Either the date of origin for this Communication, or the beginning of a period of time during which something is effective, such as a Promotion Start Date.

### .6.5.3.12 Finish Date / Time (popup calendar)

When does this Event end, conclude, become invalid or expire?

### .6.5.3.13 Subject

The Subject of this Communication to the Party. What is given in the Subject line of an Email message, for example.

### .6.5.3.14 Note

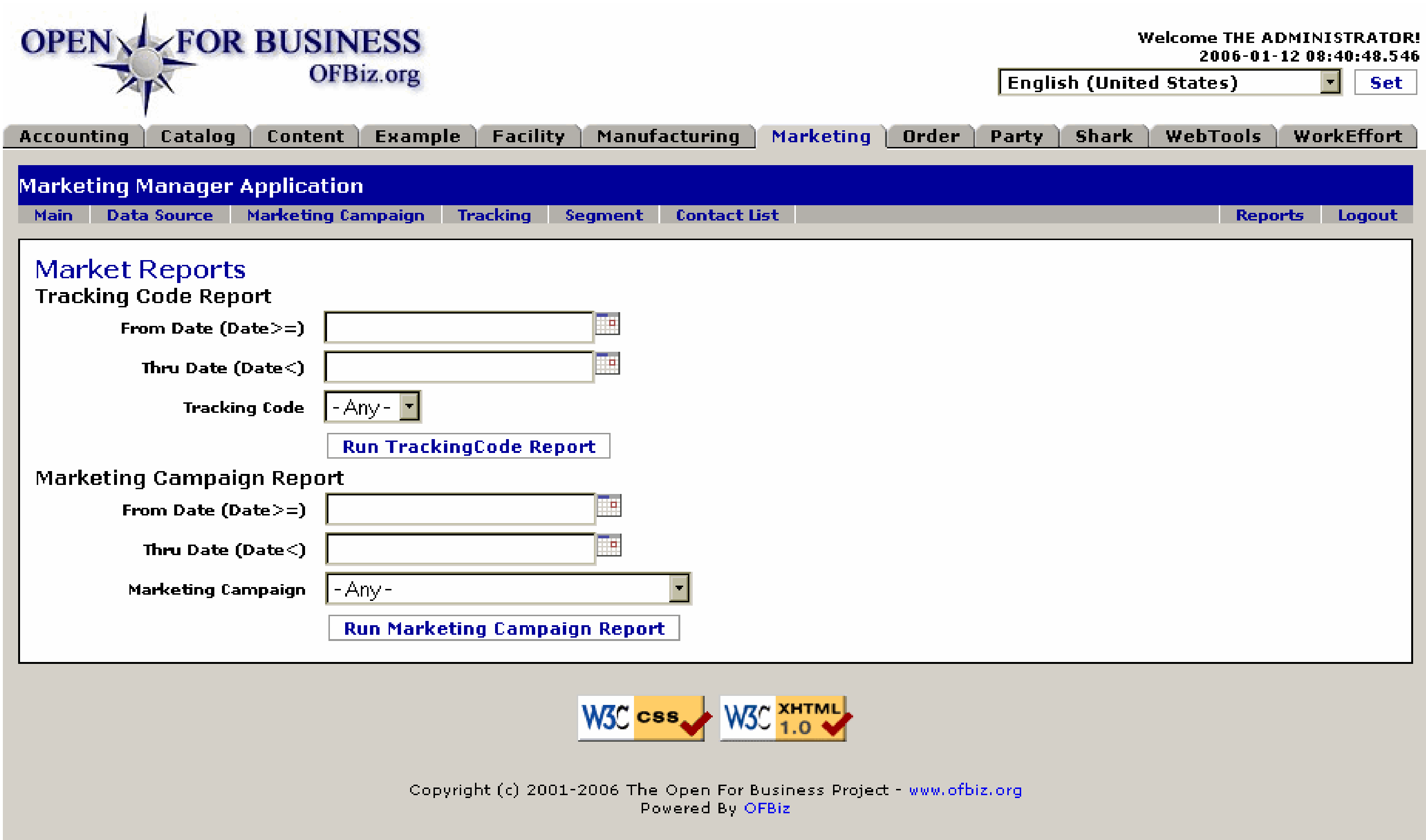
Information recorded for the originator and others but not intended for the recipients.

### .6.5.3.15 Content

What you want to say in the Communication.

# .7 Reports

## .7.1 Marketing Report




Set the criteria, then run either a Tracking Report or a Marketing Campaign Report from here.

## .7.2 link buttons

[Run TrackingCode Report] [Run Marketing Campaign Report]

## .7.3 Tracking Code Report

### .7.3.1 From Date (>=) (popup calendar)

Select the period of time to be covered in the report by specifying the earliest date you wish to have reported. All the activity following that date will be reported.

## .7.3.2 Thru Date (<=) (popup calendar)

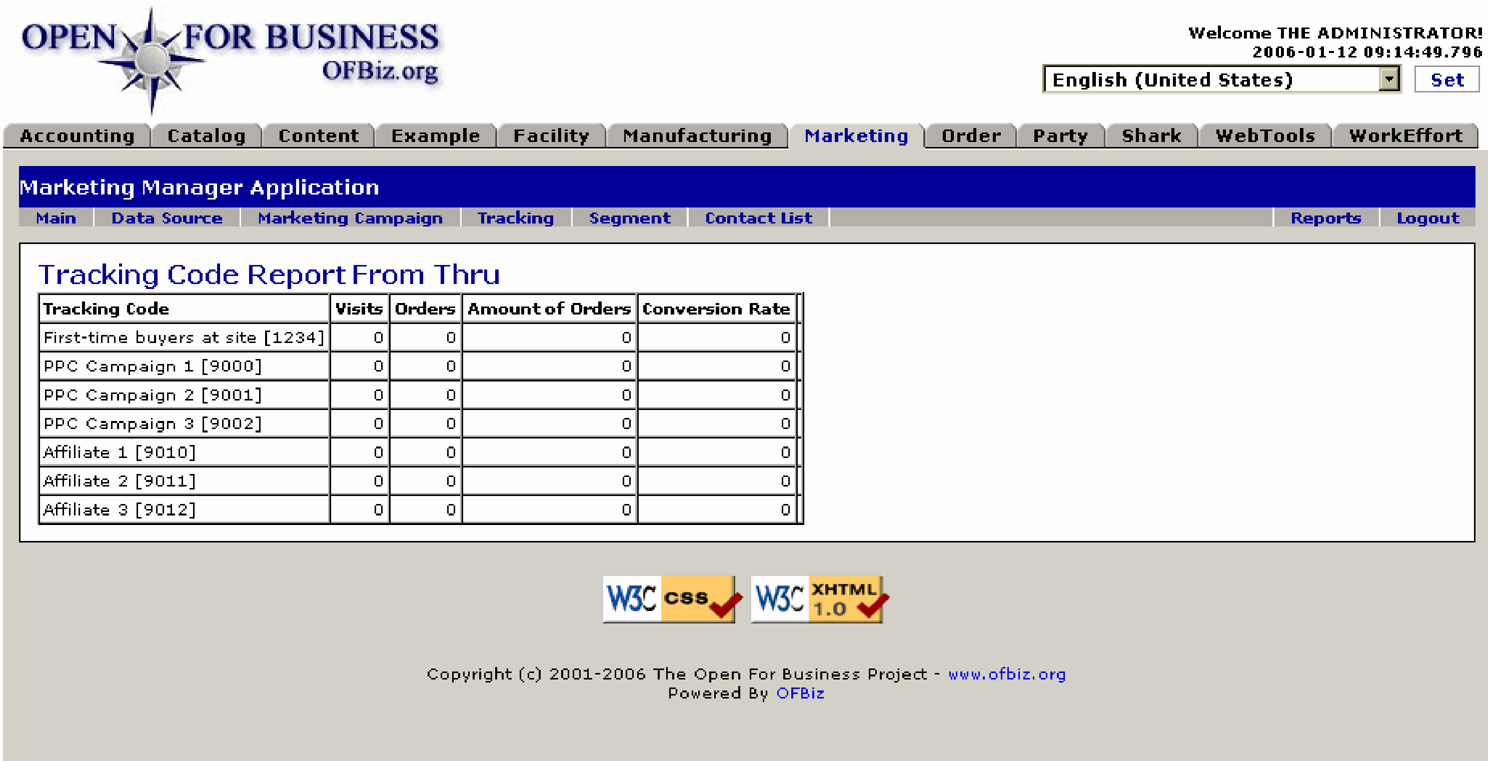
If you wish the period of reporting to be other than thru the present moment, specify a cut-off point with the popup calendar.

## .7.3.3 Tracking Code (drop-down box)

All existing Tracking Codes that could be reported are listed in the drop-down screen. If you wish the Report to focus on one particular Code, select it here. Else, all Tracking Codes will be reported if no date is specified.

## .7.3.4 Results of the run

### .7.3.4.1 TrackingCodeReport




| Tracking Code | Visits | Orders | Amount of Orders | Conversion Rate |
|---|---|---|---|---|
| First-time buyers at site [1234] | 0 | 0 | 0 | 0 |
| PPC Campaign 1 [9000] | 0 | 0 | 0 | 0 |
| PPC Campaign 2 [9001] | 0 | 0 | 0 | 0 |
| PPC Campaign 3 [9002] | 0 | 0 | 0 | 0 |
| Affiliate 1 [9010] | 0 | 0 | 0 | 0 |
| Affiliate 2 [9011] | 0 | 0 | 0 | 0 |
| Affiliate 3 [9012] | 0 | 0 | 0 | 0 |

To see all activity for all Tracking Codes, give no dates and select "Any" for the Code.

## .7.4 Marketing Code Report

### .7.4.1 From Date (>=) (popup calendar)

Select the period of time to be covered in the report by specifying the earliest date you wish to have reported. All the activity following that date will be reported.

### .7.4.2 Thru Date (>=) (popup calendar)

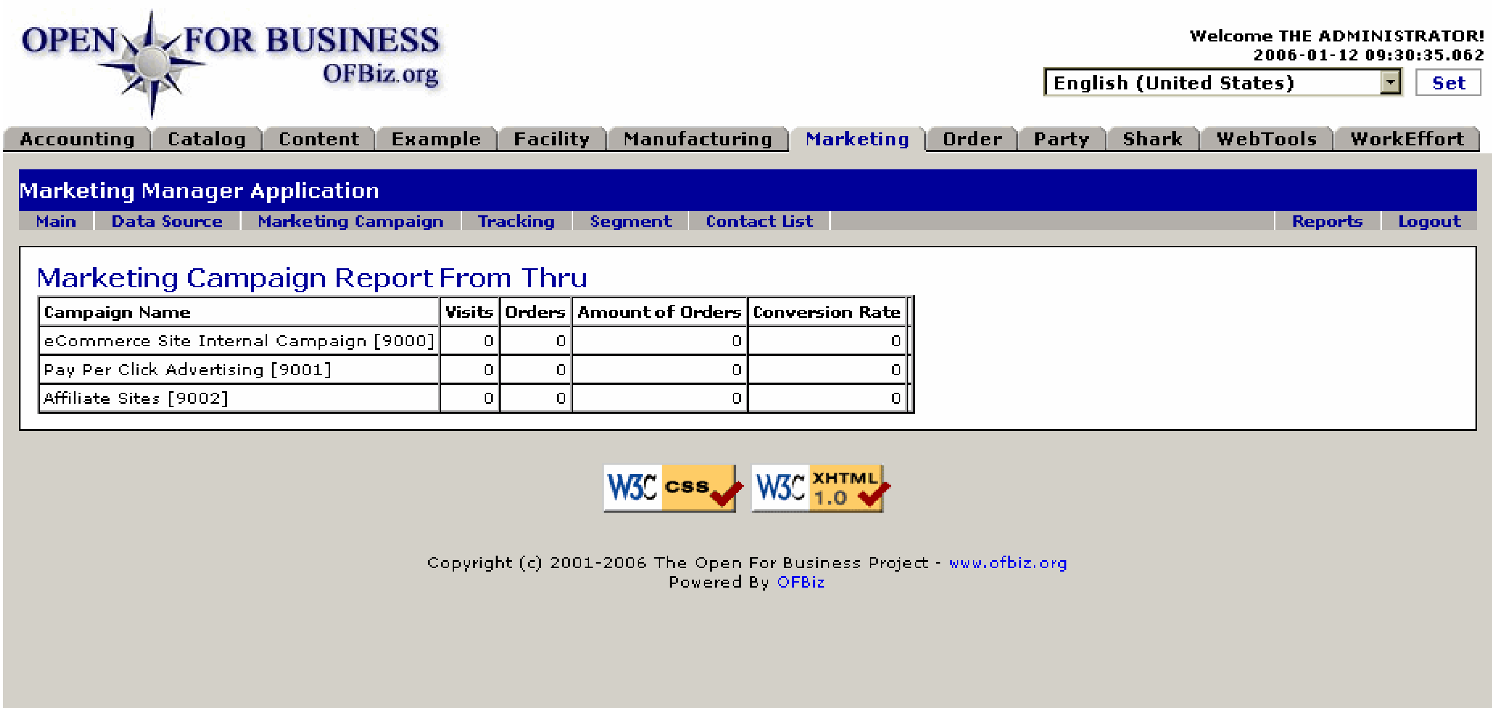
If you wish the period of reporting to be other than thru the present moment, specify a cut-off point with the popup calendar.

### .7.4.3 Marketing Campaign

All existing Marketing Campaigns that could be reported are listed in the drop-down screen. If you wish the Report to focus on one particular Campaign, select it here. Else, all Marketing Campaigns will be reported, but only if no dates are specified.

### .7.4.4 Results of the run

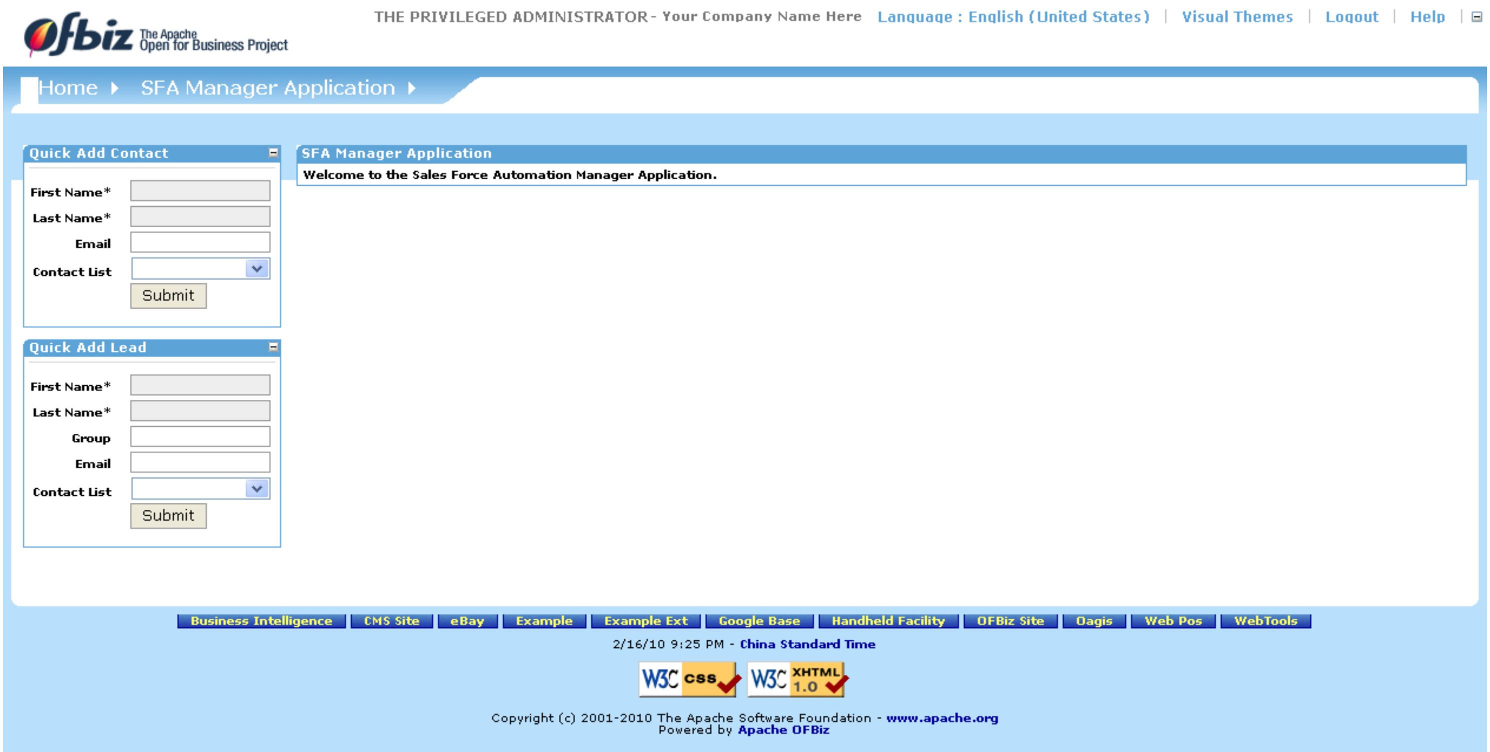
#### .7.4.4.1 MarketingCampaignReport




To see all activity for all Marketing Campaigns, give no dates and select "Any" from the drop-down box.

# Chapter 14: SFA Manager

## .1 Main




## .2 Accounts

## .3 Contacts

## .4 Leads

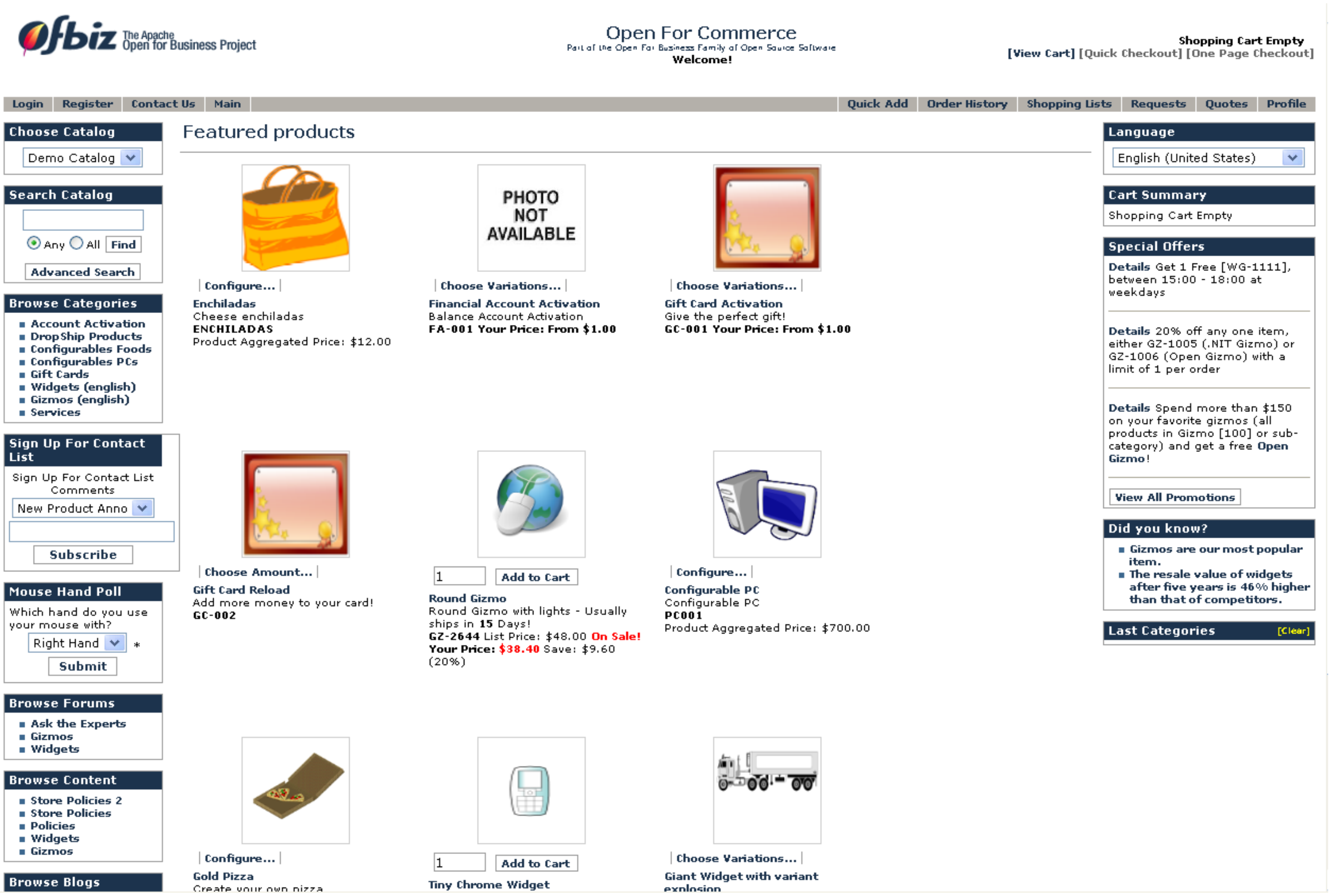
## .5 Sales Forecast

## .6 Opportunities

# Chapter 15: eCommerce

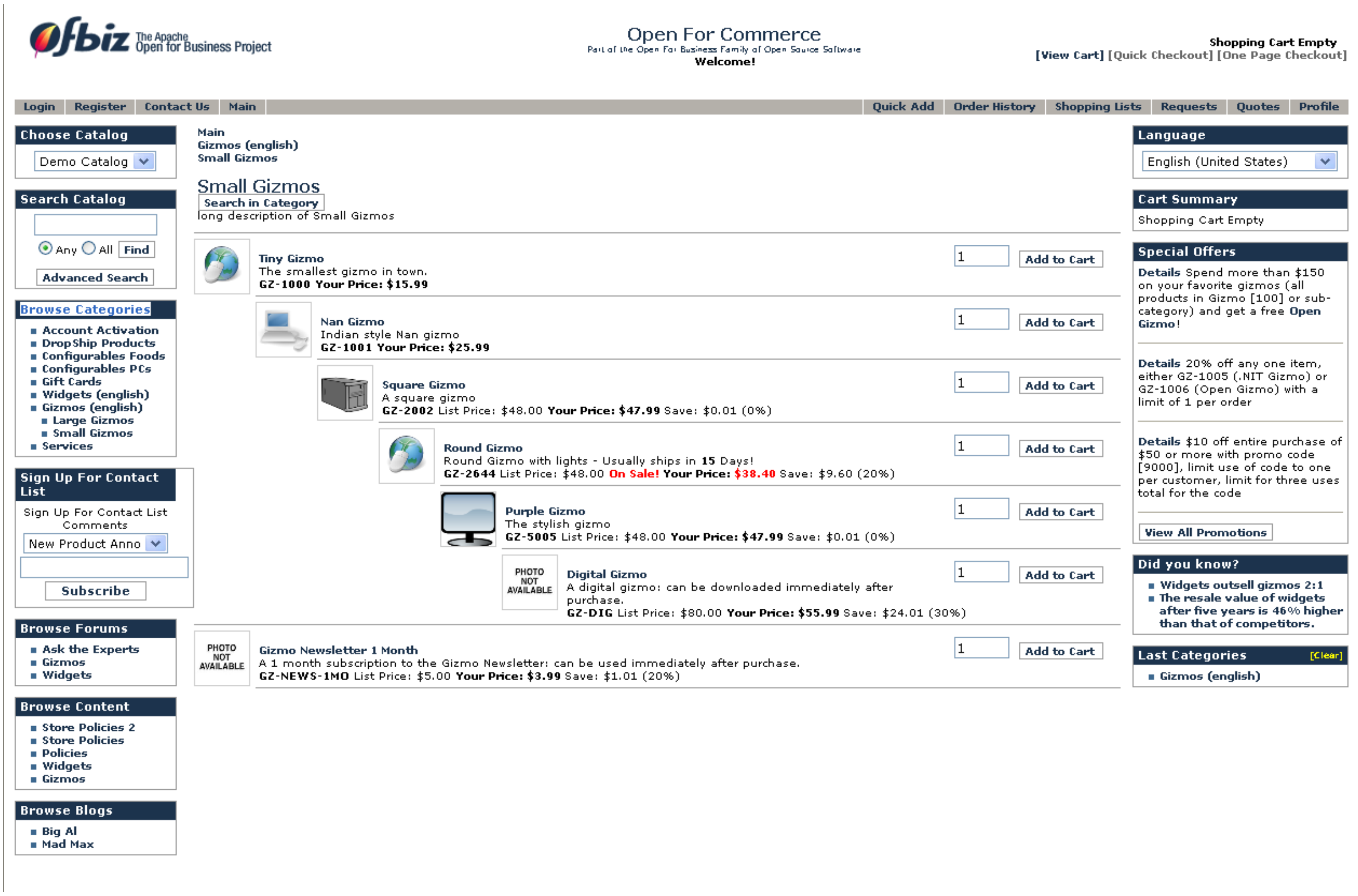
## .1 Introduction

## .2 Storefront



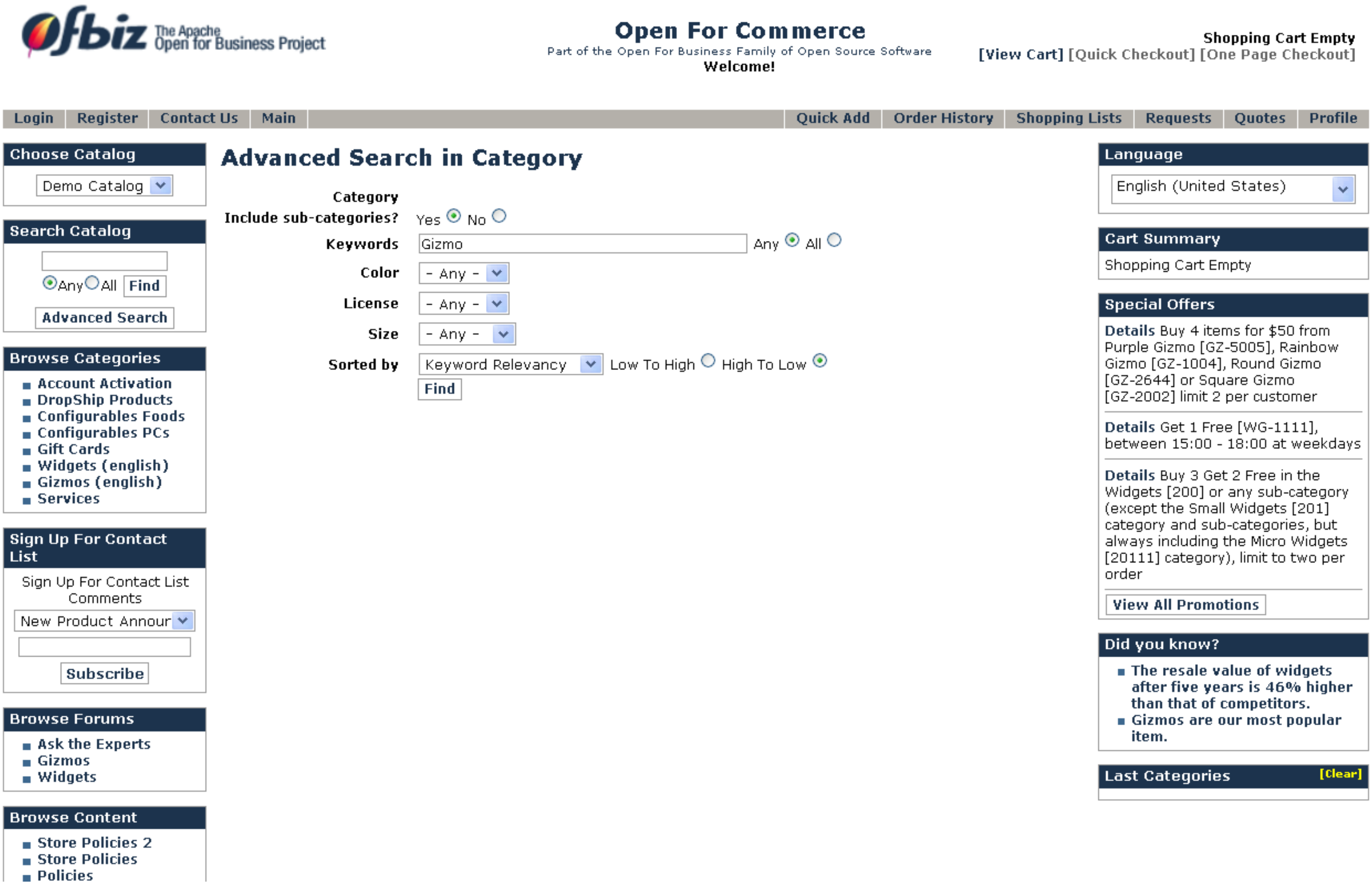
# Browse Categories

http://localhost:8080/ecommerce/products/100/101



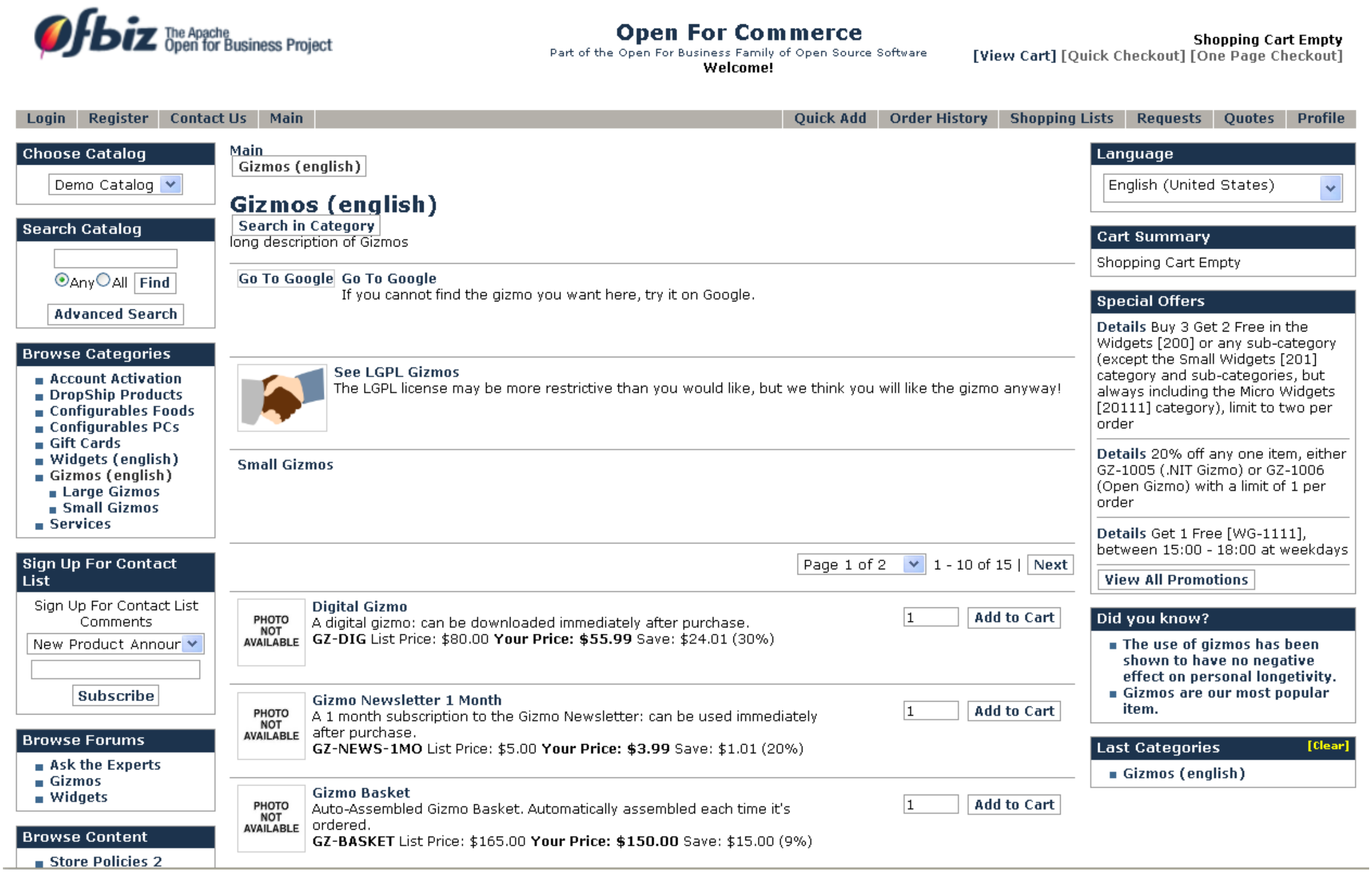

# Advanced Search in Category

http://localhost:8080/ecommerce/control/advancedsearch



The Apache Open for Business Project
Open For Commerce
Part of the Open For Business Family of Open Source Software
Welcome!
Shopping Cart Empty
[View Cart] [Quick Checkout] [One Page Checkout]
Login
Register
Contact Us
Main
Quick Add
Order History
Shopping Lists
Requests
Quotes
Profile
Choose Catalog
Demo Catalog
Search Catalog
Any All Find
Advanced Search
Browse Categories
Account Activation
DropShip Products
Configurables Foods
Configurables PCs
Gift Cards
Widgets (english)
Gizmos (english)
Services
Sign Up For Contact List
Sign Up For Contact List Comments
New Product Annour
Subscribe
Browse Forums
Ask the Experts
Gizmos
Widgets
Browse Content
Store Policies 2
Store Policies
Policies
Advanced Search in Category
Category
Include sub-categories? Yes No
Keywords Gizmo Any All
Color - Any -
License - Any -
Size - Any -
Sorted by Keyword Relevancy Low To High High To Low
Find
Language
English (United States)
Cart Summary
Shopping Cart Empty
Special Offers
Details Buy 4 items for $50 from Purple Gizmo [GZ-5005], Rainbow Gizmo [GZ-1004], Round Gizmo [GZ-2644] or Square Gizmo [GZ-2002] limit 2 per customer
Details Get 1 Free [WG-1111], between 15:00 - 18:00 at weekdays
Details Buy 3 Get 2 Free in the Widgets [200] or any sub-category (except the Small Widgets [201] category and sub-categories, but always including the Micro Widgets [20111] category), limit to two per order
View All Promotions
Did you know?
The resale value of widgets after five years is 46% higher than that of competitors.
Gizmos are our most popular item.
Last Categories
[Clear]


Click [Find]


The Apache Open for Business Project
Open For Commerce
Part of the Open For Business Family of Open Source Software
Welcome!
Shopping Cart Empty
[View Cart] [Quick Checkout] [One Page Checkout]
Login Register Contact Us Main
Quick Add Order History Shopping Lists Requests Quotes Profile
Choose Catalog
Demo Catalog
Search Catalog
Any All Find
Advanced Search
Browse Categories
Account Activation
DropShip Products
Configurables Foods
Configurables PCs
Gift Cards
Widgets (english)
Gizmos (english)
Large Gizmos
Small Gizmos
Services
Sign Up For Contact List
Sign Up For Contact List Comments
New Product Annour
Subscribe
Browse Forums
Ask the Experts
Gizmos
Widgets
Browse Content
Store Policies 2
Main
Gizmos (english)
Gizmos (english)
Search in Category
long description of Gizmos
Go To Google Go To Google
If you cannot find the gizmo you want here, try it on Google.
See LGPL Gizmos
The LGPL license may be more restrictive than you would like, but we think you will like the gizmo anyway!
Small Gizmos
Page 1 of 2 1 - 10 of 15 | Next
PHOTO NOT AVAILABLE
Digital Gizmo
A digital gizmo: can be downloaded immediately after purchase.
GZ-DIG List Price: $80.00 Your Price: $55.99 Save: $24.01 (30%)
1 Add to Cart
Gizmo Newsletter 1 Month
A 1 month subscription to the Gizmo Newsletter: can be used immediately after purchase.
GZ-NEWS-1MO List Price: $5.00 Your Price: $3.99 Save: $1.01 (20%)
1 Add to Cart
Gizmo Basket
Auto-Assembled Gizmo Basket. Automatically assembled each time it's ordered.
GZ-BASKET List Price: $165.00 Your Price: $150.00 Save: $15.00 (9%)
1 Add to Cart
Language
English (United States)
Cart Summary
Shopping Cart Empty
Special Offers
Details Buy 3 Get 2 Free in the Widgets [200] or any sub-category (except the Small Widgets [201] category and sub-categories, but always including the Micro Widgets [20111] category), limit to two per order
Details 20% off any one item, either GZ-1005 (.NIT Gizmo) or GZ-1006 (Open Gizmo) with a limit of 1 per order
Details Get 1 Free [WG-1111], between 15:00 - 18:00 at weekdays
View All Promotions
Did you know?
The use of gizmos has been shown to have no negative effect on personal longevity.
Gizmos are our most popular item.
Last Categories [Clear]
Gizmos (english)

# Login


The Apache Open for Business Project
Open For Commerce
Part of the Open For Business Family of Open Source Software
Welcome!
Shopping Cart Empty
[View Cart] [Quick Checkout] [One Page Checkout]
Login Register Contact Us Main
Quick Add Order History Shopping Lists Requests Quotes Profile
Login
Registered User
Username: DemoCustomer1
Password: •••••
Login
New User
You may create a new account here:
Create
Forgot Your Password?
Username:
Get Password Hint Email Password
W3C CSS W3C XHTML 1.0
Copyright (c) 2001-2010 The Apache Software Foundation - www.apache.org
Powered by Apache OFBiz
See Store Policies Here

# View profile

https://localhost:8443/ecommerce/control/viewprofile

The Apache Open for Business Project

**Open For Commerce**
Part of the Open For Business Family of Open Source Software
**Welcome ManagerP1 Customer 1! (Not You? Click Here)**

**Shopping Cart Empty**
[View Cart] [Quick Checkout] [One Page Checkout]

Logout | Contact Us | Main | Quick Add | Order History | Shopping Lists | Requests | Quotes | Profile

## The Profile of ManagerP1 Customer 1

Show Old

**Personal Information** Update

**Name** ManagerP1 Customer 1

**Loyalty Points**

You Have 0 Points From 0 order(s) in the last 12 Months

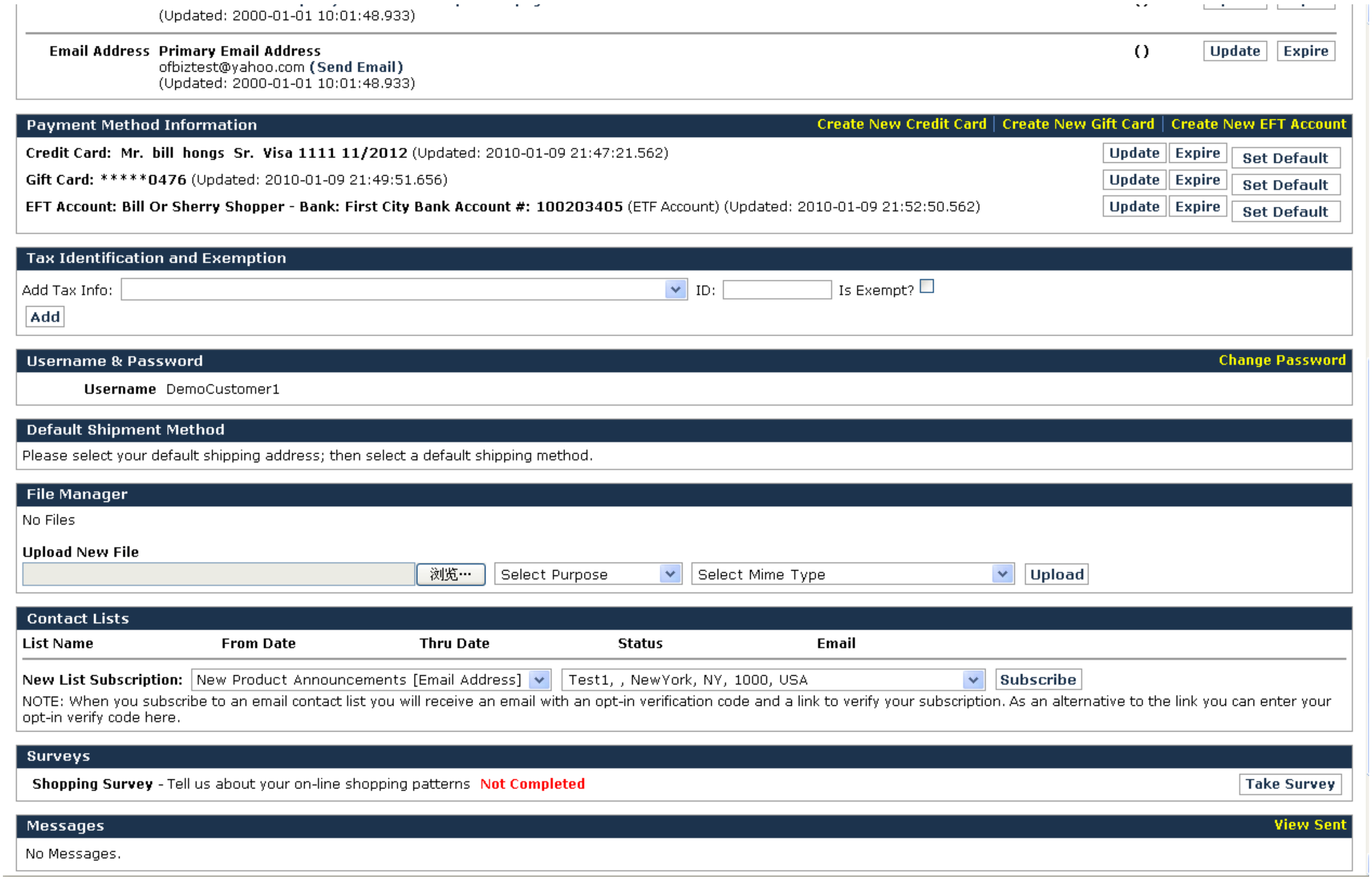
**Contact Information** Create New

| Contact Type | Information | Soliciting OK? | | |
|---|---|---|---|---|
| Postal Address | **Shipping Destination Address**<br>Set Default<br>**To:** ManagerP1 Customer 1<br>Test1<br>NewYork, NY 1000<br>USA<br>(Updated: 2010-02-14 14:25:33.781) | () | Update | Expire |
| Postal Address | **Billing (AP) Address**<br>**To:** Demo Supplier Company<br>2004 Factory Blvd<br>City of Industry, CA 90000<br>USA (Look up White pages)<br>(Updated: 2000-01-01 10:01:48.933) | () | Update | Expire |
| Phone Number | 801-555-5555 lookup:anywho.com Look up White pages<br>(Updated: 2000-01-01 10:01:48.933) | () | Update | Expire |
| Email Address | **Primary Email Address**<br>ofbiztest@yahoo.com (Send Email)<br>(Updated: 2000-01-01 10:01:48.933) | () | Update | Expire |

**Payment Method Information** Create New Credit Card | Create New Gift Card | Create New EFT Account

**Credit Card:** **Mr. bill hongs Sr. Visa 1111 11/2012** (Updated: 2010-01-09 21:47:21.562) Update Expire Set Default

**Gift Card:** *****0476 (Updated: 2010-01-09 21:49:51.656) Update Expire Set Default



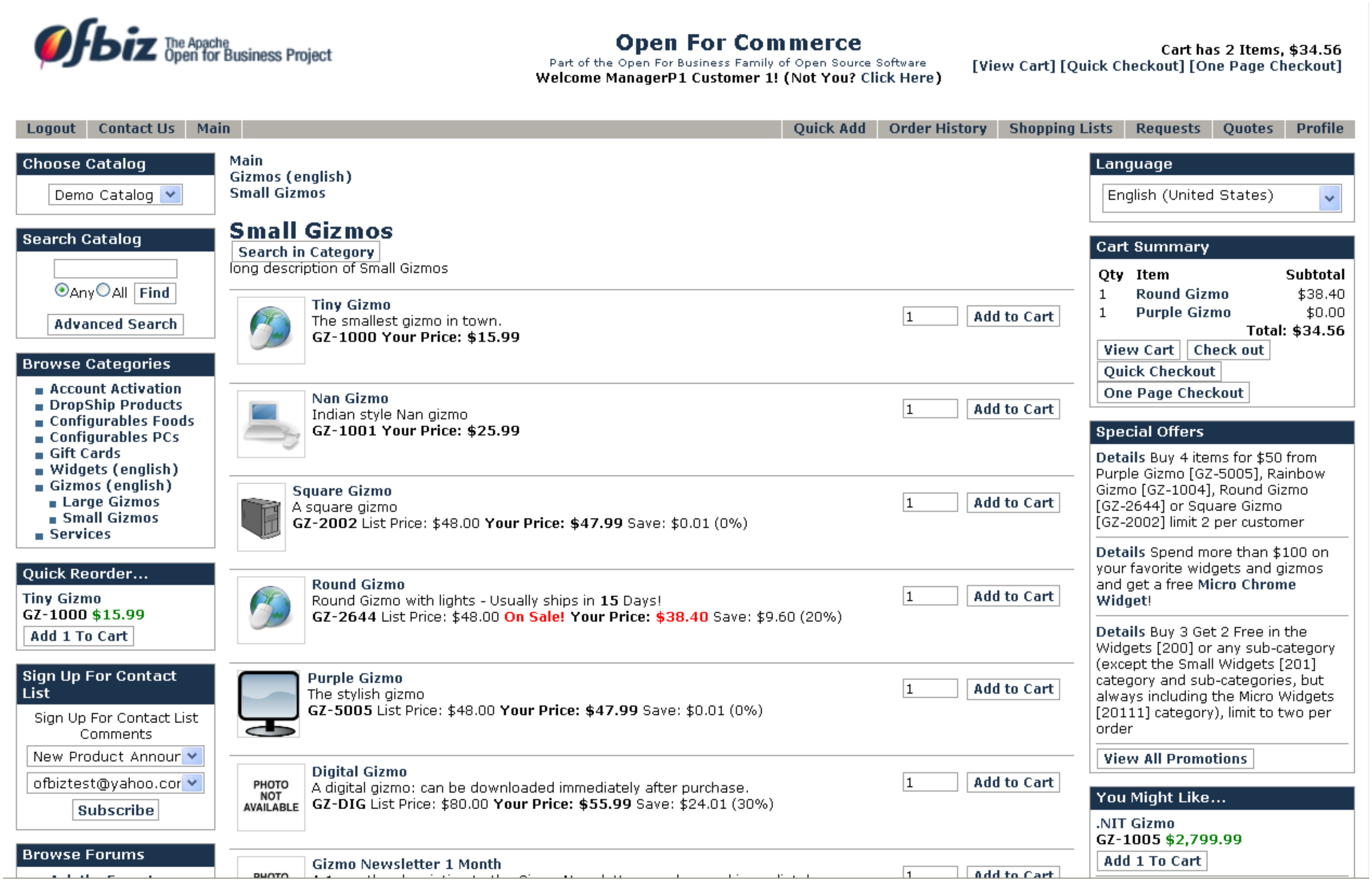

## Order history

https://localhost:8443/ecommerce/control/orderhistory


# .3 Shopping Cart

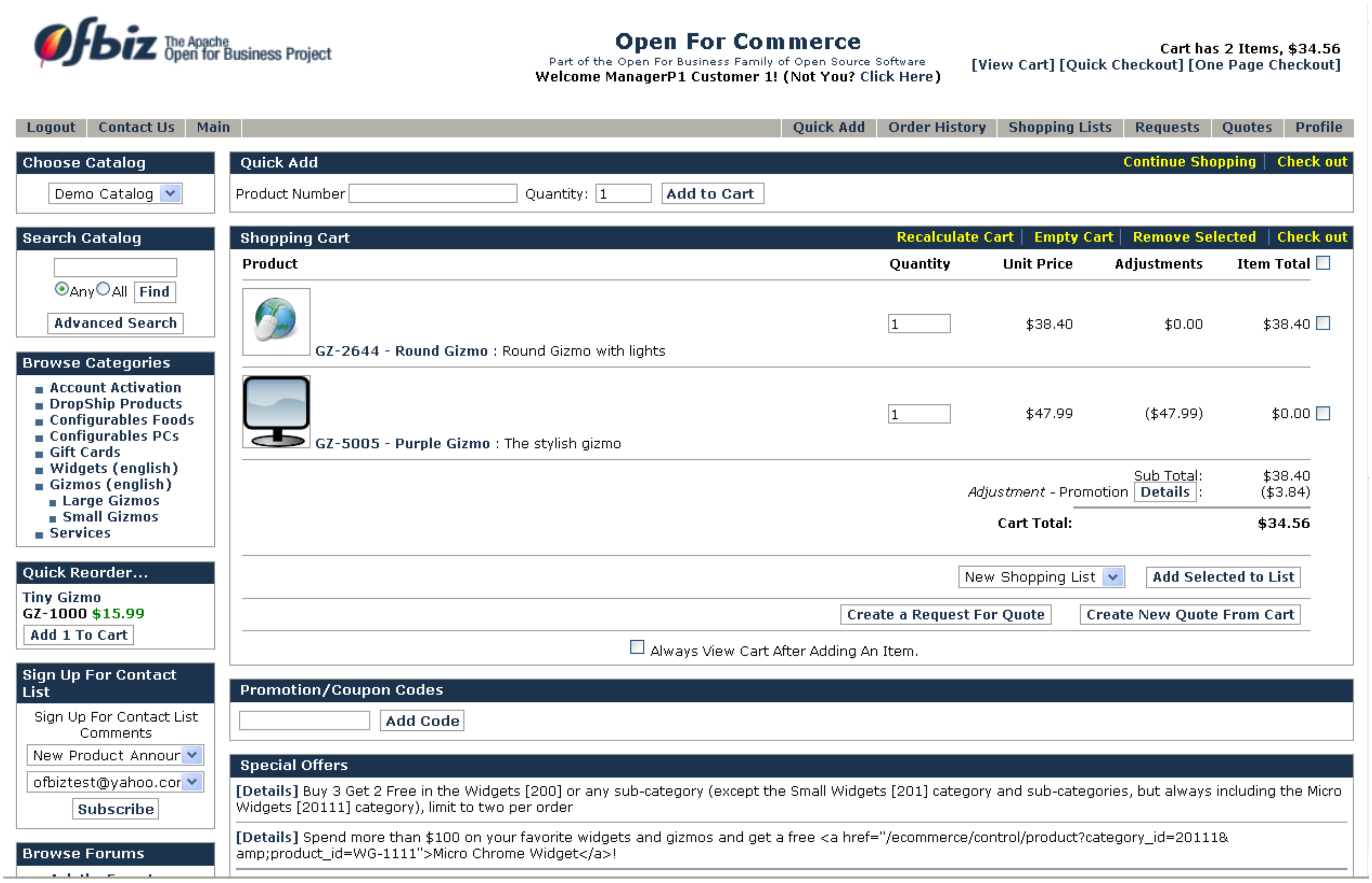
## Add Item

http://localhost:8080/ecommerce/control/additem




# Show Cart

http://localhost:8080/ecommerce/control/view/showcart




# .4 Checking Out

## Where shall we ship it?

https://localhost:8443/ecommerce/control/checkoutoptions

The Apache Open for Business Project

## Open For Commerce

Part of the Open For Business Family of Open Source Software

Welcome ManagerP1 Customer 1! (Not You? Click Here)

Cart has 2 Items, $34.56

[View Cart] [Quick Checkout] [One Page Checkout]

Logout | Contact Us | Main | Quick Add | Order History | Shopping Lists | Requests | Quotes | Profile

**1) Where shall we ship it?**

Split Shipment | New Address

**To:** ManagerP1 Customer 1
Test1
NewYork
NY
1000
USA Update

Agreement Information

**Select an agreement for this order**

Tax Identification and Exemption

Add Tax Info: ID: Is Exempt?

**Back to Shopping Cart** **Next**

**Language**

English (United States)

**Cart Summary**

| Qty | Item | Subtotal |
|---|---|---|
| 1 | Round Gizmo | $38.40 |
| 1 | Purple Gizmo | $0.00 |
| | | **Total: $34.56** |

View Cart | Check out
Quick Checkout
One Page Checkout

**Special Offers**

**Details** Buy 1 Big Gizmo [GZ-8544] or Massive Gizmo [GZ-7000] Get 1 Purple Gizmo [GZ-5005] At 50% off with promo code [9001] (must be associated with Party or Email), no limit

**Details** Buy $50 of your favorite gizmos (all products in Gizmo [100] or sub-category) get a free **Open Gizmo**! Limit 2 per order.

**Details** With special code [9021] get products in the Featured Products category for their special promotion price.

View All Promotions

**You Might Like...**

**Massive Gizmo**
**GZ-7000** $599.99
Add 1 To Cart

**His/Her Gizmo**
GZ-9290 $97.99

# How shall we ship it?

**2) How shall we ship it?**

- ○ UPS Guaranteed Next Day - $12.45
- ○ UPS Air - $6.40
- ○ UPS Ground - $3.70
- ○ USPS Express - Calculated Offline
- ○ USPS Standard - Calculated Offline
- ○ No Shipping - Calculated Offline
- ◉ DHL Express - $11.40
- ○ DHL Next Afternoon - $10.40
- ○ DHL Second Day - $6.40
- ○ DHL Ground - $3.70
- ○ FEDEX Next Morning - $0.00
- ○ FEDEX Guaranteed Next Day - $0.00
- ○ FEDEX Next Afternoon - $0.00
- ○ FEDEX Second Day - $0.00
- ○ FEDEX Express - $0.00
- ○ FEDEX Ground - $0.00
- ○ FEDEX Ground Home Delivery - $0.00

**Ship all at once, or 'as available'?**

- ◉ Please wait until the entire order is ready before shipping.
- ○ Please ship items I ordered as they become available (you may incur additional shipping charges).

**Special Instructions**

**PO Number**

**Is This a Gift??**

○ Yes ◉ No

**Gift Message**

**Email Addresses**

Your order will be sent to the following email addresses:
**ofbiztest@yahoo.com**
Your may update these in your [Profile].

You may add other comma separated email addresses here that will be used only for the current order:

[Back to Shopping Cart] [Next]

**Language**

English (United States)

**Cart Summary**

| Qty | Item | Subtotal |
|---|---|---|
| 1 | Round Gizmo | $38.40 |
| 1 | Purple Gizmo | $0.00 |
| | | **Total: $34.56** |

[View Cart] [Check out]
[Quick Checkout]
[One Page Checkout]

**Special Offers**

**Details** Get 1 Free [WG-1111], between 15:00 - 18:00 at weekdays

**Details** Buy $50 of your favorite gizmos (all products in Gizmo [100] or sub-category) get a free **Open Gizmo**! Limit 2 per order.

**Details** With special code [9021] get products in the Featured Products category for their special promotion price.

[View All Promotions]

**You Might Like...**

.NIT Gizmo
**GZ-1005** $2,799.99
[Add 1 To Cart]

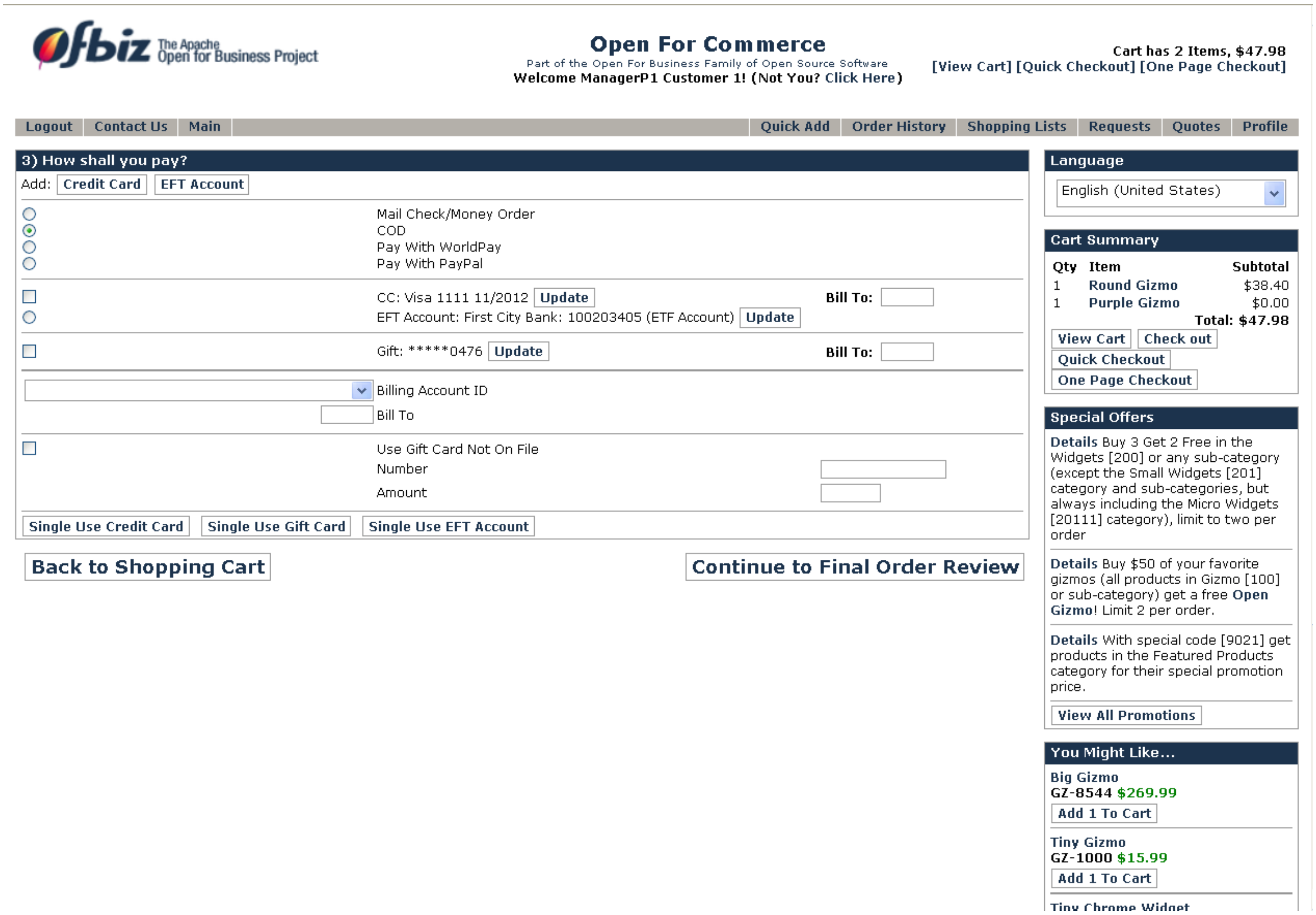
Massive Gizmo
**GZ-7000** $599.99
[Add 1 To Cart]

Tiny Chrome Widget
**WG-5569** $48.00
[Add 1 To Cart]

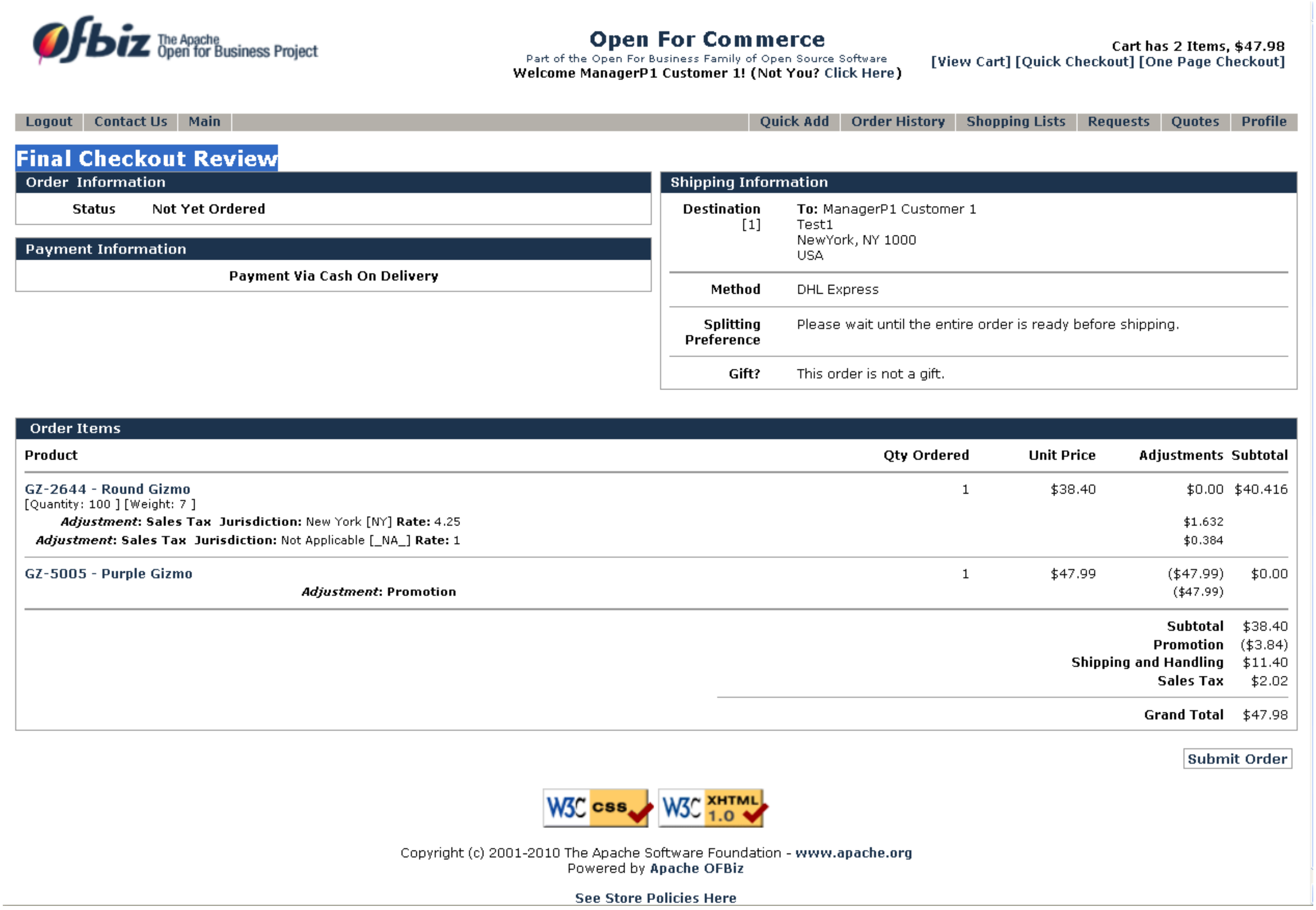
**Did you know?**

- **The use of gizmos has been shown to have no negative effect on personal longevity.**
- **Did you know that widget users live twice as long as their non-widget counterparts?**

# How shall you pay?



# Final Checkout Review



Open For Commerce
Part of the Open For Business Family of Open Source Software
Welcome ManagerP1 Customer 1! (Not You? Click Here)

Cart has 2 Items, $47.98
[View Cart] [Quick Checkout] [One Page Checkout]

Logout | Contact Us | Main | Quick Add | Order History | Shopping Lists | Requests | Quotes | Profile

## Final Checkout Review

**Order Information**

| | |
|---|---|
| **Status** | **Not Yet Ordered** |

**Payment Information**

**Payment Via Cash On Delivery**

**Shipping Information**

| | |
|---|---|
| **Destination** [1] | **To:** ManagerP1 Customer 1<br>Test1<br>NewYork, NY 1000<br>USA |
| **Method** | DHL Express |
| **Splitting Preference** | Please wait until the entire order is ready before shipping. |
| **Gift?** | This order is not a gift. |

**Order Items**

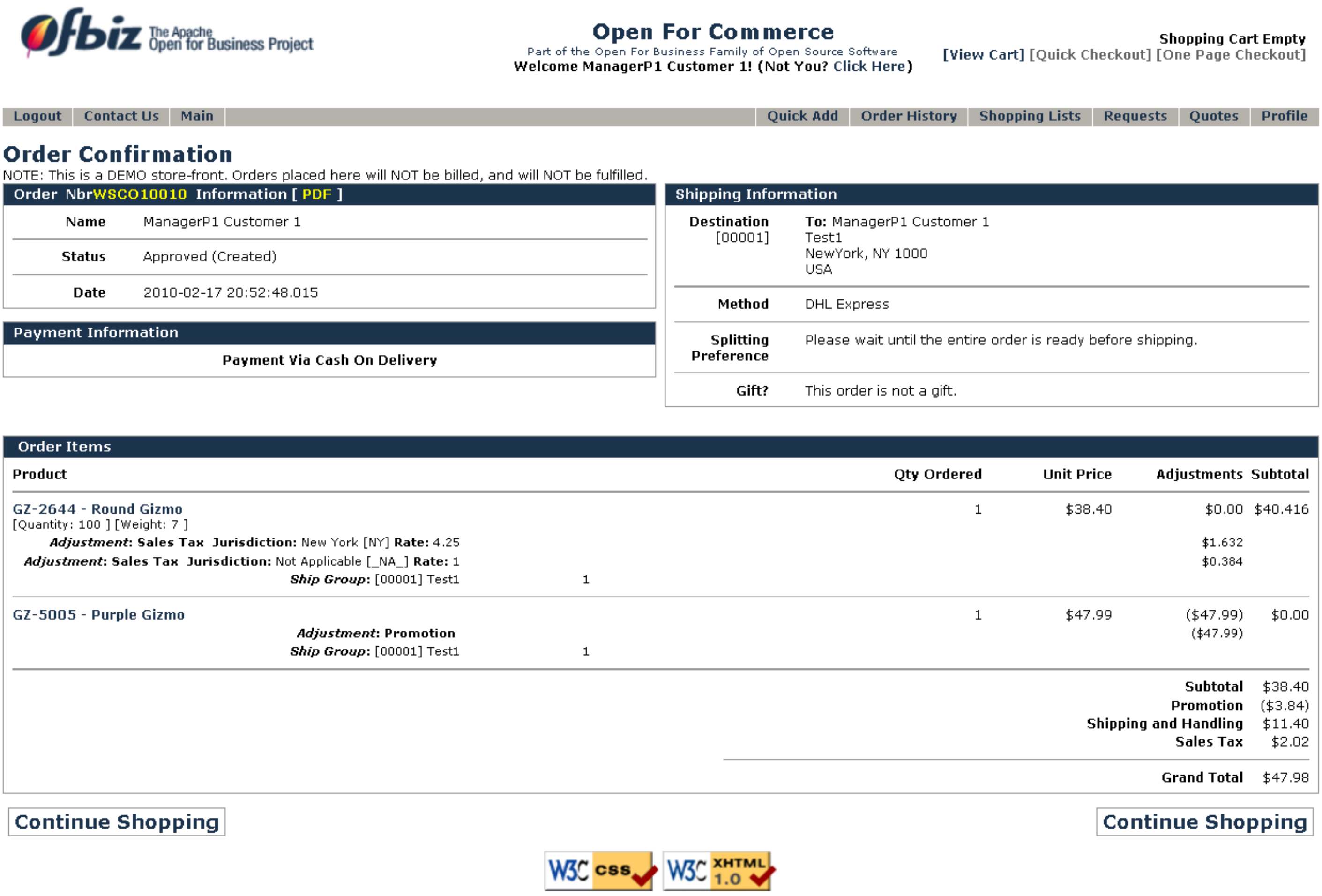
| Product | Qty Ordered | Unit Price | Adjustments | Subtotal |
|---|---|---|---|---|
| GZ-2644 - Round Gizmo<br>[Quantity: 100 ] [Weight: 7 ] | 1 | $38.40 | $0.00 | $40.416 |
| ***Adjustment*: Sales Tax Jurisdiction:** New York [NY] **Rate:** 4.25 | | | $1.632 | |
| ***Adjustment*: Sales Tax Jurisdiction:** Not Applicable [_NA_] **Rate:** 1 | | | $0.384 | |
| GZ-5005 - Purple Gizmo | 1 | $47.99 | ($47.99) | $0.00 |
| ***Adjustment*: Promotion** | | | ($47.99) | |
| | | | **Subtotal** | $38.40 |
| | | | **Promotion** | ($3.84) |
| | | | **Shipping and Handling** | $11.40 |
| | | | **Sales Tax** | $2.02 |
| | | | **Grand Total** | $47.98 |

Submit Order



See Store Policies Here

## Order Confirmation




# OFBiz E-commerce and ERP: 3rd Party Integrations

Apache Open For Business (OFBiz) offers an amazing amount of functionality across a wide variety of business processes. The scope of OFBiz, as with most ERP systems, is very broad — including e-commerce, inventory and order management, accounting, manufacturing, and much more. As you consider all of the ground covered by OFBiz, it follows that any given OFBiz system is likely to encounter other systems with which it needs to gracefully interact.

3rd party integrations can sometimes become very complex. For my post today, however, let' s consider a few simple example together: we will look at three types of integrations commonly used by online e-tailers running OFBiz direct-to-consumer e-commerce storefronts.

There are many ways that Some companies(such as HotWax Media) help our customers drive traffic to their e-commerce sites, including various SEO (search engine optimization) and PPC (pay per click) tactics, but we will leave detailed discussions of those tactics for a separate post. For our example today, our story begins with a visitor arriving at the OFBiz e-commerce storefront.

Upon arriving at the merchant’s OFBiz e-commerce site, the visitor browses products. There are some really effective merchandising features available with OFBiz, including cross-sell, up-sell, layered navigation, promotions, and so forth. As our visitor navigates the site and finds the products she wants, she adds them to her shopping cart. Eventually, she has her cart loaded up and is ready to checkout.

Using OFBiz, Some companies (such as HotWax Media) creates completely custom checkout experiences for our customers. One-page checkout, split shipments, anonymous checkout, coupon codes — it’s all available through OFBiz. There are, however, additional 3rd party checkout options that are also available. So these will be our first examples of 3rd party integrations available with OFBiz.

## OFBiz Payment/Checkout Integrations

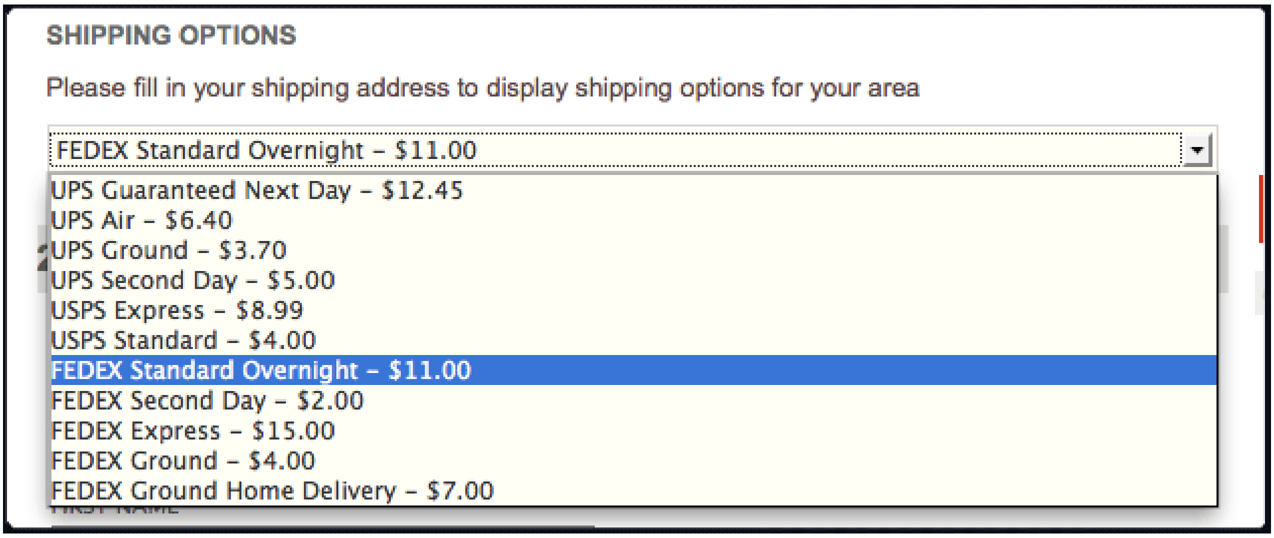
Google Checkout and PayPal Express checkout are both available to OFBiz merchants.

The idea with these 3rd party checkout services (as with most concepts in online retail) is to boost conversion rates. This works well for users who already have established checkout preferences. For example, if our site visitor prefers PayPal Express, she simply selects that checkout option, enters her PayPal username and password, chooses her shipping method, and she is done. The benefit is that she may have saved a minute or two, and presumably she is comfortable with PayPal and confident in the quality of her purchase transaction.

## OFBiz Shipping Integrations

We mentioned shipping, and this is our next example of 3rd party integration options.

Unless our merchant is exclusively selling digital products that are downloaded by the end user, he needs to offer shipping options in order to fulfill his orders. Using OFBiz, Some companies (such as HotWax Media) offer many integration options with 3rd party shipping services. The idea is to make this as simple as possible for the shopper by allowing her to see custom, real-time shipping costs (based on her shipping address) from a variety of carriers and allow her to select her preferred method.




Shipping integrations available with Some companies (such as HotWax Media) and OFBiz include the biggest names in shipping, such as FedEx, UPS, USPS, and DHL. We also offer more specialized integrations with Endicia (includes USPS support) and Oagis Shipping. (As of December 2009, Endicia (with USPS support), UPS WorldShip, and a more complete FedEx integration are currently not offered out-of-the-box with OFBiz, but are available through Some companies (such as HotWax Media).) These 3rd party shipping integrations allow our online merchant to control rate display in the user' s shopping cart (using real time shipping rate quotes that the merchant can then adjust as needed — see screenshot above). Once the order is picked and packed, the merchant can automatically print shipping labels, email a tracking number and shipment confirmation to the customer, and more.

## OFBiz Payment Gateway Integrations

Finally it is time to submit the order and process payment. Our visitor has her products in her cart, has selected her shipping method, and has entered her payment information. She clicks "Submit Order," and this is where the payment gateway comes in.

PayPal Authorize.Net Orbital

Using OFBiz, Some companies (such as HotWax Media) offer integrations with a variety of 3rd party payment gateways. The industry leaders are PayPal, Authorize.net, and Orbital, so we generally recommend one of these. These integrations offer credit card processing along with fraud monitoring, scoring, order separation for manual review, and many other useful features for our online merchant. The order is submitted, the card is processed, and there you have it — **e-commerce!**

That was just a simple example of a very common e-commerce use case that makes use of a few 3rd party integrations. Of course, there are many other 3rd party integrations available using OFBiz, such as multi-channel sales (eBay, Amazon, etc.), single sign-on (Crowd), and integrations with other systems like Magento. I plan to address many of these in future posts.

In the mean time, for a more complete list of 3rd party integrations available from Some companies (such as HotWax Media)/ OFBiz, take a look at our 3rd Party OFBiz Integrations page.

# Chapter 16: Project Manager

## Complete the implementation of the ProjectMgr component

The project manager is currently under development. The open issues are listed in Jira. If somebody would like to help, please read the description below first. On the other hand if you have suggestions for this text please add a Jira issue to the ProjectMgr component or add a comment. It is modeled after the PMW (Project Manager Workbench and other project manager packages.
The main purpose of the project manager application is the administration of projects, phases, tasks and resources and tracking of estimated time against actual time which is entered via timesheets on project tasks only. This time registration is then used to generate invoices which can be send to the 'client' party of the project.
In order to use the system, make sure you have resources, create a project, phases and tasks, add the resources to the project level and enter the estimated start and completion dates or use the schedule function. From then on, tasks can assigned and time and status can be registered.

### Status

The project component is now complete however reporting could be improved.

### System principles.

- A project consists out of one or more phases of which each phase can have one or more tasks.
- A task always has a parentPhase.
- Time registration is only done on a task level.
- Estimated and actual dates are only maintained at the task level. For reporting they are calculated to the higher levels. Project views are created to support this.
- The workAssoc entity is used to identify relationships in the order the tasks should be executed, a facility needs to be added to calculated the estimated start/end dates of every task according these relationships.
- In the option 'myTime" time can only be reported on assigned tasks, tasks can only be assigned to projectmembers.
- All timestamps in the timesheets have a time set to '00:00:00.0"
- A timesheet is only for one week and one week only and can have many time entries, one for each task and one day within the fromDate and Thrudate of the timesheet. A timentry is always referring to a task(Workeffort)
- A timesheet only has related time entries where the partyId is null meaning that these entries are from the partyId on the timesheet. The thrudate is not used on the TimeEntry, only the fromdate. The timeEntry only registers hours for the specific fromDate date only.
- In a project the following (security) roles are recognized:
  Administrator: has full access over all projects

Client Manager, Client Analyst: has full read access over the project. and can report time.
Client Billing: who will receive the invoices.
Provider Manager: has full access to the project he is member of.
Provider Accounting: who can create invoices and send these to the Client Billing,or if not present to the Client manager.

## System Setup.

The system is divided into 2 parts:

- The 'my' options such as 'my tasks' and 'my time'.The logged user has the possibility to add and modify tasks assigned to him and link new tasks to projectphases of projects where he is a member of. A task can be standalone and not part of a project for personal use.

- The more general options for the project manager to setup projects and phases and planning dates and assign resources to tasks.
- The administrator functions to add resources and skill types

## CURRENT DATA MODEL

- Project (WE)
    - SubProject
    - Notes
    - ProjectTeamMember (party)
    - Phase (WE)
        - Task (WE)
            - Resource (partyId or fixedAsset(later))
            - Skill Standards (kind of skill and number of FTE's required)
            - Notes
            - time entry
            - Association with other tasks in which order they should be executed.
            - Customer Request

- Time Sheet
    - Resource
    - Time Entry
        - Task (we)
        - InvoiceItem

# GENERAL REPORTS LIST

Actual Reports (in HTML initially to keep it simple, make it all more interactive)

1. Task Reports
    1. Task by priority (Iteration planning / The Planning Game)
    2. Task over time estimate or past schedule
    3. Tasks not assigned, drop-down/pop-up assign to Party X
    4. Tasks not scheduled (Product Backlog in SCRUM parlance)
    5. Tasks assigned to me
2. Project summary (By Supervisor / By Client)
    1. Tasks by priority (including their status)
    2. All Tasks and Subtasks expanded (in order to see detail)
    3. Hours / Billing View - so they can see how much each person has worked during the period. Do we include what their pay rate is somewhere?
    4. TODO - Add more here.
3. Gantt for Project
4. Tasks completed, times task was reopened, Avg. time taken to fix a task , Avg. number of tasks fixed per day
5. WE estimate versus actual
6. Estimated schedule/workload for party X (or me without permission) (based on hours worked per day, days per week, etc)

# System organization.

The system is organized at the top level as 'Projects' which consist of 'phases' and phases consists out of 'tasks'.  This structure is mandatory: no tasks without a related phase and no phase without a related project. The information is maintained at the task level only like estimated and actual hours,dates and the status. The information at the phase and project level is derived from the information at the task level: if all tasks are completed, the project is completed.
Another part of the system are the time sheets which are entered in a weekly period only. It is only possible to report on project tasks for projects of which the person is member of the project team, depending on security the member of the team can also add tasks (not phases) to the project.
Further is is possible to (re)assign tasks to the logged on user and to other persons in the project.
Part of the system are customer requests. Incoming customer request will appear in the customer request list within the project manager. If the come in they can be assigned to new or existing

tasks. Under the same button all open requests are listing from old to new. If a task is set to complete where a customer request is attached, the customer request is also set to complete and a notification email is send to the the customer.
Incoming customer requests can either be created in the project manager itself, can be converted from incoming emails in the mypage component or can come from other sources like a website.

## Various Statusvalues explained.

There are various status values in the system, they are in two groups, the Project status values and the timesheet status values these groups are pretty independant.

### Timesheet Status.

If a time sheet status is set to complete it is indicated the timesheet party has completed the entry of hors for that week and has no intention to add more hours for that period. The projectmanager can set the status back to 'in progres' to allow to correct errors.

### Project Status.

The project status is maintained at the person --> task level only. All other status values at the task, phase and project are derived values. If all assigned persons on a task set their status to complete, then the task will be complete. If all tasks on a phase are complete, the phase is complete, if all phases on a project are complete, the project is complete.

### Task status

The task status itself is also derived from all the persons/task status assigned to this task. This person/task status has 2 values only: 'Assigned' or 'completed' The assignment can also be removed or reassigned.
The possible task status values:

1. No persons assigned to this task: the task status is 'unassigned'.
2. At least one person is assigned to this task: the task status is 'assigned'.
3. At least one person has registered time for this task: the task status is: 'in progress'
4. If all persons have set their personal status of the task to complete: the task status is: 'complete'

For a further explanation about the different roles see the Project Manager Application Roles

## How to get started?

First of all have a look at the standard demo information delivered with the system, there you will have an idea how it will look like. If you want tos start from scratch do the following:

- Create a new project under the 'projects' button, when created the project overview is shown
- go to the 'tasks' button within the project and create at least one phase, now it is possble to add tasks
- Add a task referring to the phase(s) created before and optionally add planned hours.
- add dependencies between tasks
- go to the gantt chart and press the schedule button.
- Now you will see all tasks after each other depending on the dependencies.

Remember you can only use parties which have been made available in the projectmanager under the resources button. In a project you can only assign resources to a task which have been made available in the project.

## Project administrator Role

The project administrator has full access over all projects, can perform all tasks of any projectmanager and additionally can:

- Create new projects and assign a project manager
- maintain skill types
- maintain resources in the resources manager.The demo login id for this role is 'admin'.

## Project manager Role.

The project manager is responsible for one or more projects and can perform the tasks of any project member and additionally can do the following functions:

1. Create or make sure a proper Resource list exist by selecting existing parties in the project resources tab.
2. Create a project with related phases and tasks or copy these from a template.
3. Add resources from the resourcelist to the project.
4. Add planned start and end/dates and estimated hours required (a scheduler is planned)
5. Start the project and let everybody register their time in the mytime option.
6. Monitor on a weekly basis the registered hours.
7. Monitor the planned versus actual dates in the project.
8. Create invoices at the end of the month from the entered timesheets

The demo login for this role is 'DemoEmployee1'.

## Project participant Role.

The project participant can use the 'myTask' and 'myTime' functions and read all other information about the projects:

- assign and reassign tasks in projects he is a member of.
- enter time in a weekly time sheet to report about the worked hours.
- View all information about any project.
  Perhaps it is good to note here, that as many as is required, approval authorities can be added to the task and that without their approval the task cannot get into the completed status. In the 'mytask' tab the tasks are listed for which approval is required.

The demo login for this role is 'DemoEmployee2' for project 1.
The demo login for this role is 'DemoEmployee3' for project 2.
The demo login for this role is 'DemoCustomer1' for project 1.
The demo login for this role is 'DemoCustomer2' for project 2.

## Project accounting Role.

The project accounting role consist out of the following activities:

- Be able to define the party rates and party rate types.
- Be able to create invoices from registered hours on projects which were not yet billed.

Please note that this is an application in development and comments are welcomed, either in Jira as a request or at the bottom of the page.

# Chapter 17: Technical - WebTools

## .1 Main

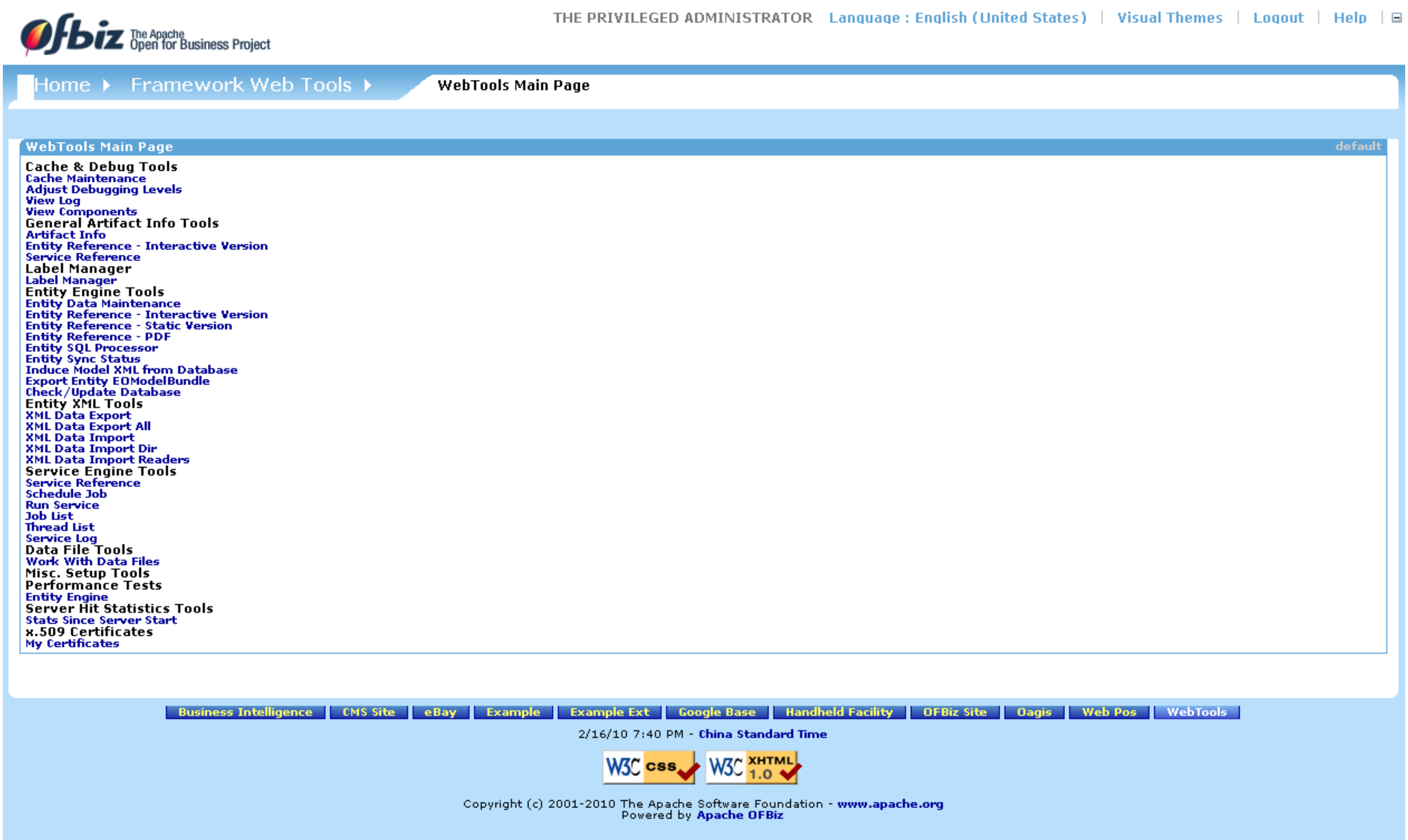
Intended for technical users; for detail on this application see the Business Level Technical Overview.

The purpose of this Web Tools administration package is to contain all of the administration tools that directly relate to the various Core Tool Components.

The Core Tool Component layer is defined in the architecture documents as the container of all entity definitions shared by the vertical applications that are built on top of these entity definitions and the tools surrounding them such as the entity, workflow, and rule engines, content and knowledge management, data analysis, and so forth.

This application is primarily intended for developers and system administrators.

### .1.1 main



## .1.2 link buttons

NOTES:

1. Each tool name is a link to the named tool.
2. To return to this menu view, click the major WebTools tab at the top of the screen.

# .2 Cache Tools

## .2.1 Cache Maintenance

### .2.1.1 FindUtilCache

OPEN FOR BUSINESS
OFBiz.org

Welcome Lesley Austin!
2004-07-22 10:25:02.767

Accounting | Catalog | Content | Facility | Manufacturing | Marketing | Order | Party | Shark | WebTools | WorkEffort

**Core Application WebTools**

Main | Logout

## Cache Maintenance Page

[Reload Cache List] [Clear All Caches] [Clear Expired From All]

| Cache Name | size | hitCount | missCount | maxSize | expireTime | useSoftRef? | Administration |
|---|---|---|---|---|---|---|---|
| AppletSessions | 2 | 0 | 3 | 0 | 600,000 | true | Elements Edit Clear |
| Content | 10 | 0 | 0 | 10 | 0 | false | Elements Edit Clear |
| Content2 | 2 | 0 | 0 | 10 | 0 | false | Elements Edit Clear |
| DataResourceContentView | 1 | 0 | 0 | 10 | 0 | false | Elements Edit Clear |
| DataResourceContentView10 | 1 | 0 | 0 | 10 | 0 | false | Elements Edit Clear |
| DataResourceContentView11 | 1 | 0 | 0 | 10 | 0 | false | Elements Edit Clear |
| DataResourceContentView12 | 1 | 0 | 0 | 10 | 0 | false | Elements Edit Clear |
| DataResourceContentView2 | 0 | 0 | 0 | 10 | 0 | false | Elements Edit Clear |
| DataResourceContentView3 | 2 | 0 | 0 | 10 | 0 | false | Elements Edit Clear |
| DataResourceContentView4 | 2 | 0 | 0 | 10 | 0 | false | Elements Edit Clear |
| DataResourceContentView5 | 8 | 0 | 0 | 10 | 0 | false | Elements Edit Clear |
| DataResourceContentView6 | 2 | 0 | 0 | 10 | 0 | false | Elements Edit Clear |
| DataResourceContentView7 | 1 | 0 | 0 | 10 | 0 | false | Elements Edit Clear |
| DataResourceContentView8 | 1 | 0 | 0 | 10 | 0 | false | Elements Edit Clear |
| DataResourceContentView9 | 1 | 0 | 0 | 10 | 0 | false | Elements Edit Clear |
| DataResourceContentView_ELECTRONIC_TEXT | 1 | 0 | 0 | 10 | 0 | false | Elements Edit Clear |
| DataResourceContentView_ELECTRONIC_TEXT2 | 1 | 0 | 0 | 10 | 0 | false | Elements Edit Clear |
| DataResourceContentView_ELECTRONIC_TEXT3 | 1 | 0 | 0 | 10 | 0 | false | Elements Edit Clear |
| DataResourceContentView_ELECTRONIC_TEXT4 | 1 | 0 | 0 | 10 | 0 | false | Elements Edit Clear |
| DataResourceContentView_ELECTRONIC_TEXT5 | 1 | 0 | 0 | 10 | 0 | false | Elements Edit Clear |
| DataResourceContentView_ELECTRONIC_TEXT_text/html | 1 | 0 | 0 | 10 | 0 | false | Elements Edit Clear |
| DataResourceContentView_ELECTRONIC_TEXT_text/html2 | 1 | 0 | 0 | 10 | 0 | false | Elements Edit Clear |
| DataResourceContentView_ELECTRONIC_TEXT_text/html3 | 4 | 0 | 0 | 10 | 0 | false | Elements Edit Clear |
| DataResourceContentView_ELECTRONIC_TEXT_text/html4 | 1 | 0 | 0 | 10 | 0 | false | Elements Edit Clear |
| DataResourceContentView_IMAGE_OBJECT | 1 | 0 | 0 | 10 | 0 | false | Elements Edit Clear |
| DataResourceContentView_IMAGE_OBJECT2 | 3 | 0 | 0 | 10 | 0 | false | Elements Edit Clear |
| DataResourceContentView_IMAGE_OBJECT3 | 1 | 0 | 0 | 10 | 0 | false | Elements Edit Clear |
| DataResourceContentView_IMAGE_OBJECT4 | 1 | 0 | 0 | 10 | 0 | false | Elements Edit Clear |
| DataResourceContentView_LOCAL_FILE | 1 | 0 | 0 | 10 | 0 | false | Elements Edit Clear |
| DataResourceContentView_OFBIZ_FILE | 1 | 0 | 0 | 10 | 0 | false | Elements Edit Clear |
| Person | 0 | 0 | 0 | 10 | 0 | false | Elements Edit Clear |
| Person2 | 0 | 0 | 0 | 10 | 0 | false | Elements Edit Clear |
| Person3 | 0 | 0 | 0 | 10 | 0 | false | Elements Edit Clear |
| ProductFeature | 0 | 0 | 0 | 10 | 0 | false | Elements Edit Clear |
| entity.EcaReaders | 1 | 4,269,591 | 2 | 0 | 0 | false | Elements Edit Clear |
| entity.FindAll.default | 28 | 60,960 | 1,017,440 | 0 | 0 | true | Elements Edit Clear |
| entity.FindByAnd.default | 863 | 898,403 | 197,478 | 0 | 0 | true | Elements Edit Clear |
| entity.FindByPrimaryKey.default | 358 | 1,057,878 | 1,253,584 | 0 | 0 | true | Elements Edit Clear |
| entity.JNDIContexts | 1 | 1 | 2 | 0 | 0 | false | Elements Edit Clear |
| entity.ModelFieldTypeReader | 1 | 1,191,178 | 2 | 0 | 0 | false | Elements Edit Clear |
| entity.ModelGroupReader | 1 | 0 | 2 | 0 | 0 | false | Elements Edit Clear |
| entity.ModelReader | 1 | 0 | 2 | 0 | 0 | false | Elements Edit Clear |
| minilang.SimpleMapProcessorsResource | 8 | 77,119 | 16 | 0 | 0 | false | Elements Edit Clear |
| minilang.SimpleMapProcessorsURL | 0 | 0 | 0 | 0 | 0 | false | Elements Edit Clear |
| minilang.SimpleMethodsDirect | 0 | 0 | 0 | 0 | 1 | false | Elements Edit Clear |
| minilang.SimpleMethodsResource | 47 | 180 | 32,970 | 0 | 1 | false | Elements Edit Clear |
| minilang.SimpleMethodsURL | 0 | 0 | 0 | 0 | 1 | false | Elements Edit Clear |
| properties.UtilPropertiesBundleLocaleCache | 427 | 45,143 | 427 | 0 | 0 | false | Elements Edit Clear |
| properties.UtilPropertiesResourceCache | 15 | 7,135,839 | 15 | 0 | 0 | false | Elements Edit Clear |
| properties.UtilPropertiesUrlCache | 2 | 23,928 | 2 | 0 | 0 | false | Elements Edit Clear |
| resource.ResourceLoaders | 5 | 30,732,614 | 10 | 0 | 0 | false | Elements Edit Clear |
| script.BshBsfParsedCache | 306 | 160 | 277,713 | 0 | 1 | false | Elements Edit Clear |
| security.SecurityGroupPermissionCache | 104 | 380,274 | 19,515 | 0 | 1,800,000 | false | Elements Edit Clear |
| security.UserLoginSecurityGroupByUserLoginId | 28 | 217,377 | 1,036 | 1,000 | 1,800,000 | false | Elements Edit Clear |
| service.ModelServiceReader.ByResourceLoader | 16 | 240 | 32 | 0 | 0 | false | Elements Edit Clear |
| service.ModelServiceReader.ByURL | 1 | 0 | 2 | 0 | 0 | false | Elements Edit Clear |
| service.ModelServices | 12 | 237,020 | 108,285 | 0 | 0 | false | Elements Edit Clear |
| service.ServiceGroups | 10 | 3 | 0 | 0 | 0 | false | Elements Edit Clear |
| webapp.BsfEvents | 1 | 0 | 25 | 0 | 1 | false | Elements Edit Clear |
| webapp.ConfigXMLReader.Config | 12 | 59,173 | 24 | 0 | 0 | false | Elements Edit Clear |
| webapp.ConfigXMLReader.Handler | 12 | 49 | 24 | 0 | 0 | false | Elements Edit Clear |
| webapp.ConfigXMLReader.Request | 12 | 1,639,474 | 24 | 0 | 0 | false | Elements Edit Clear |
| webapp.ConfigXMLReader.View | 12 | 129,270 | 24 | 0 | 0 | false | Elements Edit Clear |
| webapp.FreeMarkerCache.unknown | 29 | 8,192 | 29 | 0 | 0 | false | Elements Edit Clear |
| webapp.FreeMarkerCache.unknown10 | 21 | 12,551 | 21 | 0 | 0 | false | Elements Edit Clear |
| webapp.FreeMarkerCache.unknown11 | 84 | 173,324 | 84 | 0 | 0 | false | Elements Edit Clear |
| webapp.FreeMarkerCache.unknown12 | 30 | 10,579 | 30 | 0 | 0 | false | Elements Edit Clear |
| webapp.FreeMarkerCache.unknown2 | 8 | 7,272 | 8 | 0 | 0 | false | Elements Edit Clear |
| webapp.FreeMarkerCache.unknown3 | 71 | 12,284 | 71 | 0 | 0 | false | Elements Edit Clear |
| webapp.FreeMarkerCache.unknown4 | 39 | 2,363 | 39 | 0 | 0 | false | Elements Edit Clear |
| webapp.FreeMarkerCache.unknown5 | 44 | 9,811 | 44 | 0 | 0 | false | Elements Edit Clear |
| webapp.FreeMarkerCache.unknown6 | 8 | 6,752 | 8 | 0 | 0 | false | Elements Edit Clear |
| webapp.FreeMarkerCache.unknown7 | 47 | 10,152 | 47 | 0 | 0 | false | Elements Edit Clear |
| webapp.FreeMarkerCache.unknown8 | 79 | 54,294 | 79 | 0 | 0 | false | Elements Edit Clear |
| webapp.FreeMarkerCache.unknown9 | 13 | 6,101 | 13 | 0 | 0 | false | Elements Edit Clear |
| webapp.JasperReportsCompiled | 2 | 0 | 50 | 0 | 1 | false | Elements Edit Clear |
| webapp.Regions.Config | 5 | 3,695 | 0 | 0 | 0 | false | Elements Edit Clear |
| widget.form.classResource | 0 | 0 | 0 | 0 | 0 | false | Elements Edit Clear |
| widget.form.webappResource | 27 | 165 | 5,330 | 0 | 1 | false | Elements Edit Clear |
| widget.menu.classResource | 0 | 0 | 0 | 0 | 0 | false | Elements Edit Clear |
| widget.menu.webappResource | 1 | 49 | 2 | 0 | 0 | false | Elements Edit Clear |

[Reload Cache List] [Clear All Caches] [Clear Expired From All]



Here is an example of a Cache List on the Cache Maintenance Page.

### .2.1.2 link buttons

[Reload Cache List] [Clear All Caches] [Clear Expired From All] [Elements] [Edit]

### .2.1.3 Cache Name

### .2.1.4 Size

### .2.1.5 hitCount

### .2.1.6 misCount

### .2.1.7 maxSize

### .2.1.8 expireTime

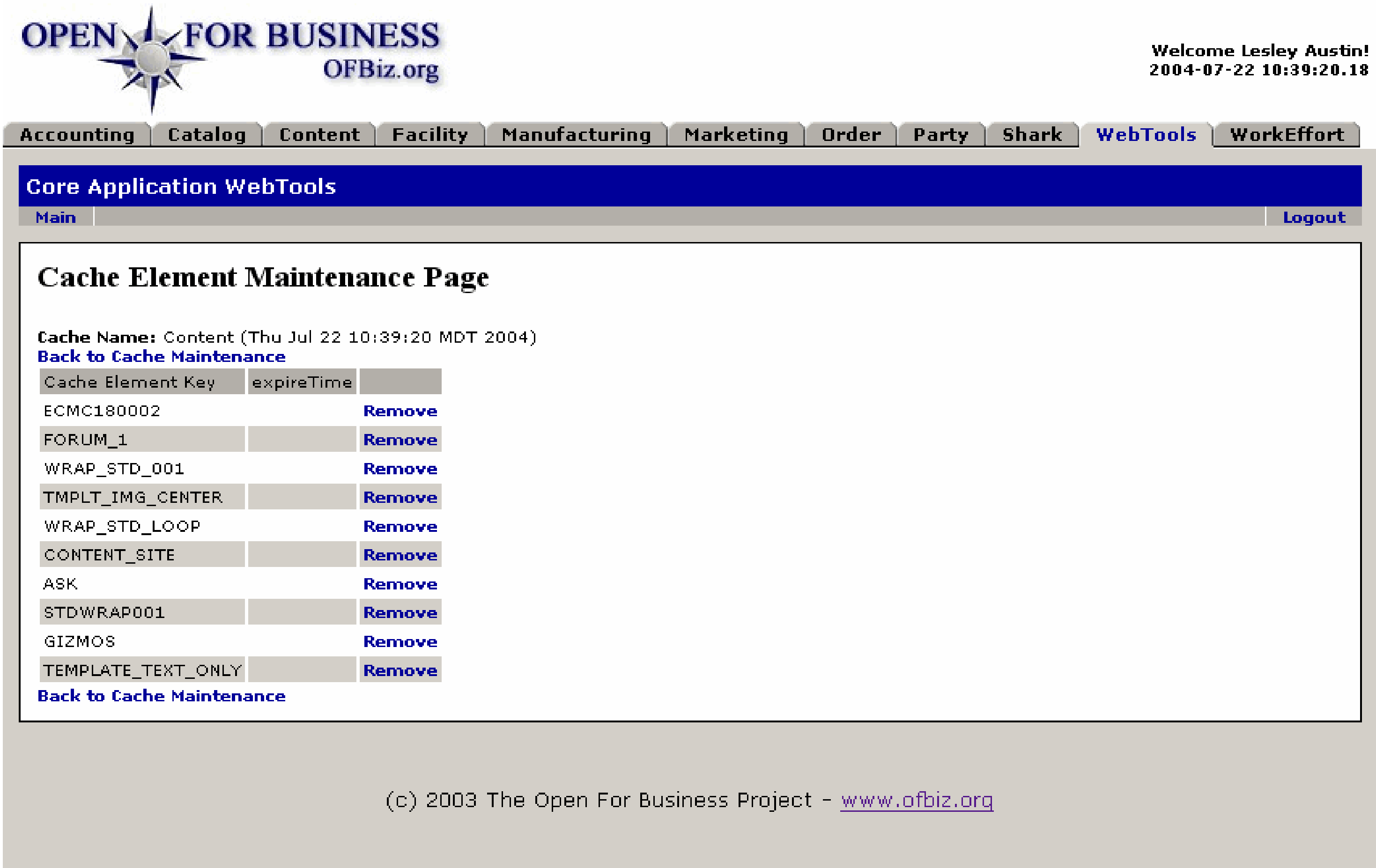
### .2.1.9 useSoftRef? (true/false)

### .2.1.10 Administration

The functions of Elements, Edit and Clear.

## .2.1.10.1 Elements >> Cache Element Maintenance Page

### .2.1.10.1.1 FindUtilCacheElements



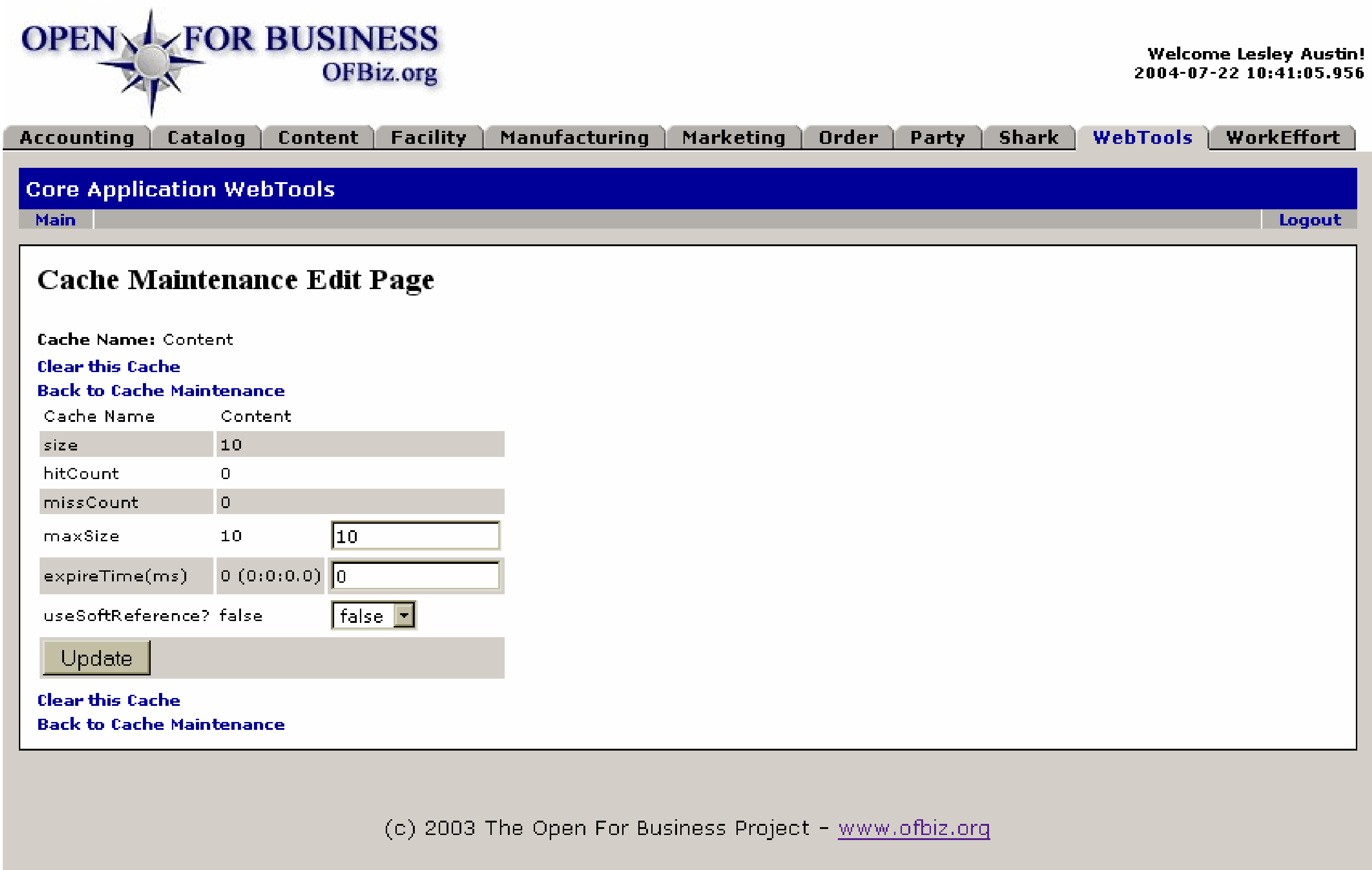

Elements of the selected Cache Name are viewed at this screen and can be removed.

### .2.1.10.1.2 link buttons

[Remove] [Back to Cache Maintenance]

## .2.1.10.2 Edit >> Cache Maintenance Edit Page

### .2.1.10.2.1 EditUtilCache




Selected Cache Element can be updated for specific items from this screen.

### .2.1.10.2.2 link buttons

[Update] [Clear this Cache] [Back to Cache Maintenance]

## .2.1.10.3 Clear

# .3 Debug Tools

## .3.1 Adjust (Update) Debugging Levels

This page is used to set and update the debugging levels. Settings are made in check boxes for the listed debugging parameters. All settings are as check boxes.

## .3.1.1 debuglevels


Update the debugging levels is very straightforward.

## .3.1.2 link buttons

[Submit]

### .3.1.3 Verbose

### .3.1.4 Timing

### .3.1.5 Info

### .3.1.6 Important

### .3.1.7 Warning

### .3.1.8 Error

### .3.1.9 Fatal

# .4 Entity Engine Tools

## .4.1 Entity Data Maintenance

### .4.1.1 Entity Data Maintenance

From this screen you can select a particular Entity type then move on to Crt (create), Fnd (find), or view All existing instances of the type.

### .4.1.2 entitymaint

OPEN FOR BUSINESS
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Welcome Lesley Austin!
2004-07-22 11:38:11.833

Accounting | Catalog | Content | Facility | Manufacturing | Marketing | Order | Party | Shark | WebTools | WorkEffort

Core Application WebTools

Main | Logout

# Entity Data Maintenance

| Entity Name | | | | Entity Name | | | | Entity Name | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| AcctgTrans | Crt | Fnd | All | InvoiceItemAttribute | Crt | Fnd | All | ProtocolType | Crt | Fnd | All |
| AcctgTransAttribute | Crt | Fnd | All | InvoiceItemType | Crt | Fnd | All | QuantityBreak | Crt | Fnd | All |
| AcctgTransEntry | Crt | Fnd | All | InvoiceItemTypeAttr | Crt | Fnd | All | QuantityBreakType | Crt | Fnd | All |
| AcctgTransEntryType | Crt | Fnd | All | InvoiceItemTypeMap | Crt | Fnd | All | Quote | Crt | Fnd | All |
| AcctgTransType | Crt | Fnd | All | InvoiceRole | Crt | Fnd | All | QuoteAttribute | Crt | Fnd | All |
| AcctgTransTypeAttr | Crt | Fnd | All | InvoiceStatus | Crt | Fnd | All | QuoteItem | Crt | Fnd | All |
| Addendum | Crt | Fnd | All | InvoiceTerm | Crt | Fnd | All | QuoteRole | Crt | Fnd | All |
| Affiliate | Crt | Fnd | All | InvoiceTermAttribute | Crt | Fnd | All | QuoteTerm | Crt | Fnd | All |
| Agreement | Crt | Fnd | All | InvoiceType | Crt | Fnd | All | QuoteTermAttribute | Crt | Fnd | All |
| AgreementAttribute | Crt | Fnd | All | InvoiceTypeAttr | Crt | Fnd | All | QuoteType | Crt | Fnd | All |
| AgreementGeographicalApplic | Crt | Fnd | All | ItemIssuance | Crt | Fnd | All | QuoteTypeAttr | Crt | Fnd | All |
| AgreementItem | Crt | Fnd | All | ItemIssuanceRole | Crt | Fnd | All | RateType | Crt | Fnd | All |
| AgreementItemAttribute | Crt | Fnd | All | JobSandbox | Crt | Fnd | All | RecurrenceInfo | Crt | Fnd | All |
| AgreementItemType | Crt | Fnd | All | KeywordThesaurus | Crt | Fnd | All | RecurrenceRule | Crt | Fnd | All |
| AgreementItemTypeAttr | Crt | Fnd | All | Lot | Crt | Fnd | All | RejectionReason | Crt | Fnd | All |
| AgreementPartyApplic | Crt | Fnd | All | MarketInterest | Crt | Fnd | All | ReorderGuideline | Crt | Fnd | All |
| AgreementProductAppl | Crt | Fnd | All | MarketingCampaign | Crt | Fnd | All | Requirement | Crt | Fnd | All |
| AgreementRole | Crt | Fnd | All | MarketingCampaignNote | Crt | Fnd | All | RequirementAndRole | View Entity | | |
| AgreementTerm | Crt | Fnd | All | MarketingCampaignPrice | Crt | Fnd | All | RequirementAttribute | Crt | Fnd | All |
| AgreementTermAttribute | Crt | Fnd | All | MarketingCampaignPromo | Crt | Fnd | All | RequirementBudgetAllocation | Crt | Fnd | All |
| AgreementType | Crt | Fnd | All | MarketingCampaignRole | Crt | Fnd | All | RequirementCustRequest | Crt | Fnd | All |
| AgreementTypeAttr | Crt | Fnd | All | MetaDataPredicate | Crt | Fnd | All | RequirementCustRequestView | View Entity | | |
| ApplicationSandbox | Crt | Fnd | All | MimeType | Crt | Fnd | All | RequirementRole | Crt | Fnd | All |
| BenefitType | Crt | Fnd | All | MrpInventoryEventPlanned | View Entity | | | RequirementStatus | Crt | Fnd | All |
| BillingAccount | Crt | Fnd | All | NeedType | Crt | Fnd | All | RequirementType | Crt | Fnd | All |
| BillingAccountAndRole | View Entity | | | NoteData | Crt | Fnd | All | RequirementTypeAttr | Crt | Fnd | All |
| BillingAccountRole | Crt | Fnd | All | OrderAdjustment | Crt | Fnd | All | RespondingParty | Crt | Fnd | All |
| BillingAccountTerm | Crt | Fnd | All | OrderAdjustmentAttribute | Crt | Fnd | All | ResponsibilityType | Crt | Fnd | All |
| BillingAccountTermAttr | Crt | Fnd | All | OrderAdjustmentType | Crt | Fnd | All | ReturnHeader | Crt | Fnd | All |
| BrowserType | Crt | Fnd | All | OrderAdjustmentTypeAttr | Crt | Fnd | All | ReturnItem | Crt | Fnd | All |
| Budget | Crt | Fnd | All | OrderAttribute | Crt | Fnd | All | ReturnItemResponse | Crt | Fnd | All |
| BudgetAttribute | Crt | Fnd | All | OrderBlacklist | Crt | Fnd | All | ReturnReason | Crt | Fnd | All |
| BudgetItem | Crt | Fnd | All | OrderBlacklistType | Crt | Fnd | All | ReturnStatus | Crt | Fnd | All |
| BudgetItemAttribute | Crt | Fnd | All | OrderContactMech | Crt | Fnd | All | ReturnType | Crt | Fnd | All |
| BudgetItemType | Crt | Fnd | All | OrderDeliverySchedule | Crt | Fnd | All | RoleType | Crt | Fnd | All |
| BudgetItemTypeAttr | Crt | Fnd | All | OrderHeader | Crt | Fnd | All | RoleTypeAndParty | View Entity | | |
| BudgetReview | Crt | Fnd | All | OrderHeaderAndItems | View Entity | | | RoleTypeAttr | Crt | Fnd | All |
| BudgetReviewResultType | Crt | Fnd | All | OrderHeaderAndPaymentPref | View Entity | | | RuntimeData | Crt | Fnd | All |
| BudgetRevision | Crt | Fnd | All | OrderHeaderAndRoles | View Entity | | | SalaryStep | Crt | Fnd | All |
| BudgetRevisionImpact | Crt | Fnd | All | OrderHeaderItemAndRoles | View Entity | | | SaleType | Crt | Fnd | All |
| BudgetRole | Crt | Fnd | All | OrderHeaderNote | Crt | Fnd | All | SecurityGroup | Crt | Fnd | All |
| BudgetScenario | Crt | Fnd | All | OrderHeaderNoteView | View Entity | | | SecurityGroupPermission | Crt | Fnd | All |
| BudgetScenarioApplication | Crt | Fnd | All | OrderItem | Crt | Fnd | All | SecurityPermission | Crt | Fnd | All |
| BudgetScenarioRule | Crt | Fnd | All | OrderItemAssociation | Crt | Fnd | All | SequenceValueItem | Crt | Fnd | All |
| BudgetStatus | Crt | Fnd | All | OrderItemAttribute | Crt | Fnd | All | ServerHit | Crt | Fnd | All |
| BudgetType | Crt | Fnd | All | OrderItemBilling | Crt | Fnd | All | ServerHitBin | Crt | Fnd | All |
| BudgetTypeAttr | Crt | Fnd | All | OrderItemContactMech | Crt | Fnd | All | ServerHitType | Crt | Fnd | All |
| CarrierAndShipmentMethod | View Entity | | | OrderItemInventoryRes | Crt | Fnd | All | SettlementTerm | Crt | Fnd | All |
| CarrierShipmentBoxType | Crt | Fnd | All | OrderItemInventoryResAndItem | View Entity | | | SharkGroup | Crt | Fnd | All |
| CarrierShipmentMethod | Crt | Fnd | All | OrderItemInventoryResAndItemLocation | View Entity | | | SharkGroupMember | Crt | Fnd | All |
| CartAbandonedLine | Crt | Fnd | All | OrderItemPriceInfo | Crt | Fnd | All | SharkGroupRollup | Crt | Fnd | All |
| CharacterSet | Crt | Fnd | All | OrderItemRole | Crt | Fnd | All | SharkUser | Crt | Fnd | All |
| CommunicationEvent | Crt | Fnd | All | OrderItemType | Crt | Fnd | All | Shipment | Crt | Fnd | All |
| CommunicationEventAndRole | View Entity | | | OrderItemTypeAttr | Crt | Fnd | All | ShipmentAndItem | View Entity | | |
| CommunicationEventPrpTyp | Crt | Fnd | All | OrderNotification | Crt | Fnd | All | ShipmentAttribute | Crt | Fnd | All |
| CommunicationEventPurpose | Crt | Fnd | All | OrderPaymentPreference | Crt | Fnd | All | ShipmentBoxType | Crt | Fnd | All |
| CommunicationEventRole | Crt | Fnd | All | OrderReportView | View Entity | | | ShipmentContactMech | Crt | Fnd | All |
| CommunicationEventType | Crt | Fnd | All | OrderRequirementCommitment | Crt | Fnd | All | ShipmentContactMechType | Crt | Fnd | All |
| CommunicationEventWorkEff | Crt | Fnd | All | OrderRole | Crt | Fnd | All | ShipmentCostEstimate | Crt | Fnd | All |
| ContactList | Crt | Fnd | All | OrderShipment | Crt | Fnd | All | ShipmentItem | Crt | Fnd | All |
| ContactListParty | Crt | Fnd | All | OrderShipmentInfoSummary | View Entity | | | ShipmentItemBilling | Crt | Fnd | All |
| ContactListType | Crt | Fnd | All | OrderShipmentPreference | Crt | Fnd | All | ShipmentItemFeature | Crt | Fnd | All |
| ContactMech | Crt | Fnd | All | OrderStatus | Crt | Fnd | All | ShipmentManifestView | View Entity | | |
| ContactMechAttribute | Crt | Fnd | All | OrderSummaryEntry | Crt | Fnd | All | ShipmentMethodType | Crt | Fnd | All |
| ContactMechLink | Crt | Fnd | All | OrderTaskList | View Entity | | | ShipmentPackage | Crt | Fnd | All |
| ContactMechPurposeType | Crt | Fnd | All | OrderTerm | Crt | Fnd | All | ShipmentPackageContent | Crt | Fnd | All |

## .4.1.3 link buttons

[Crt] [Find] [All]

## .4.1.4 Crt >> View Entity: Nnnnnnn

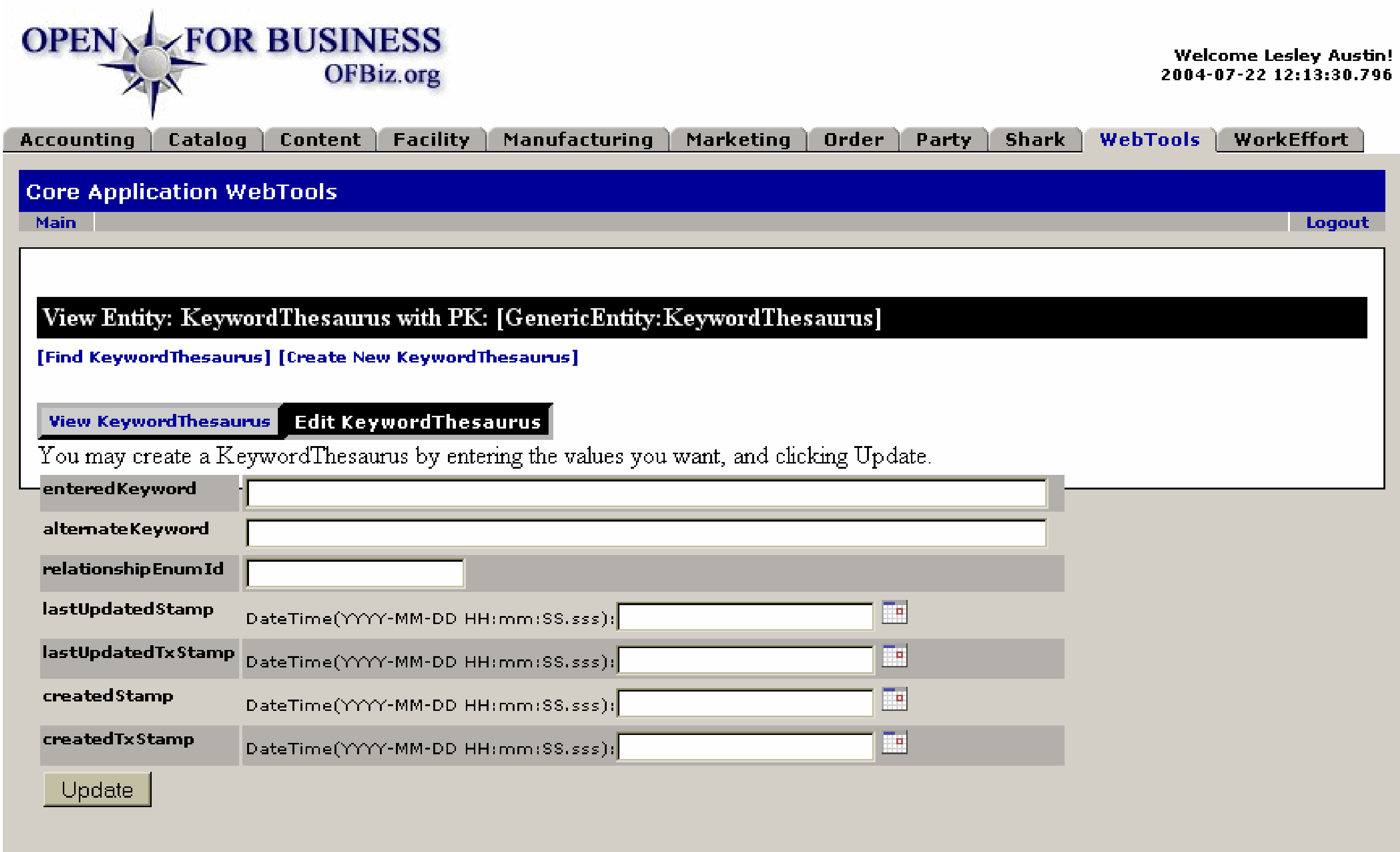
### .4.1.4.1 ViewGeneric


Links to other tools including Create New and Edit.

### .4.1.4.2 Edit Nnnnn

This screen will be very different for each of the various entities; shown is a typical screen to link you to other tools including [Edit], shown below.

### .4.1.4.2.1 ViewGeneric-new




Typical Entity Creation screen, in this case also the Edit Keyword Thesaurus screen.

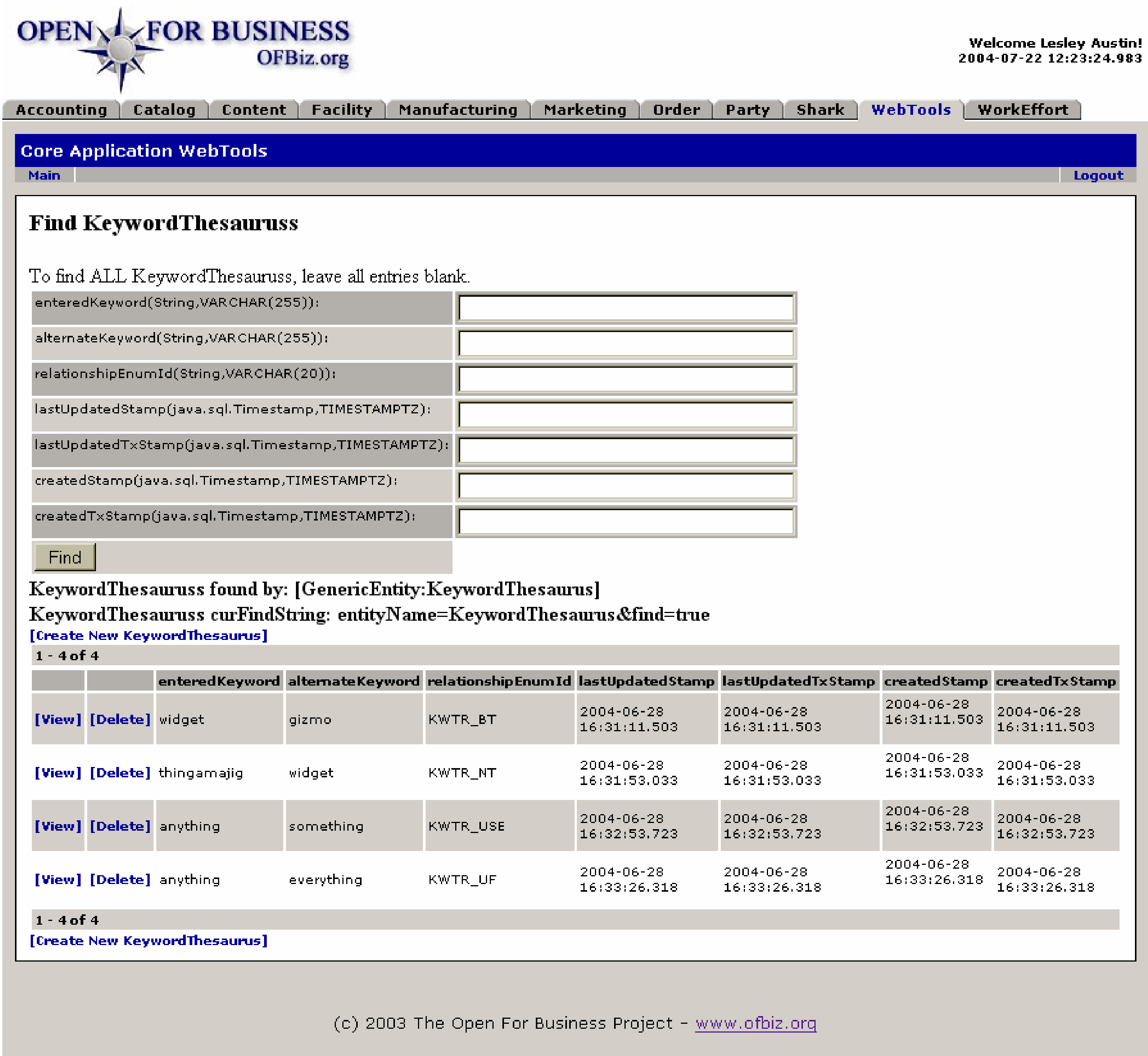
### .4.1.4.2.2 link buttons

[Update]

## .4.1.5 'Fnd' or 'All' >> Find Nnnnnn

[Fnd] brings up the screen for entering search parameters; leave them blank to return all intances. [All] brings you to the same screen with all instances presented.

## .4.1.5.1 FindGeneric




The search for instances of the selected Entity can be started with Fnd; after inputting parameters, the same screen returns with results appended below.

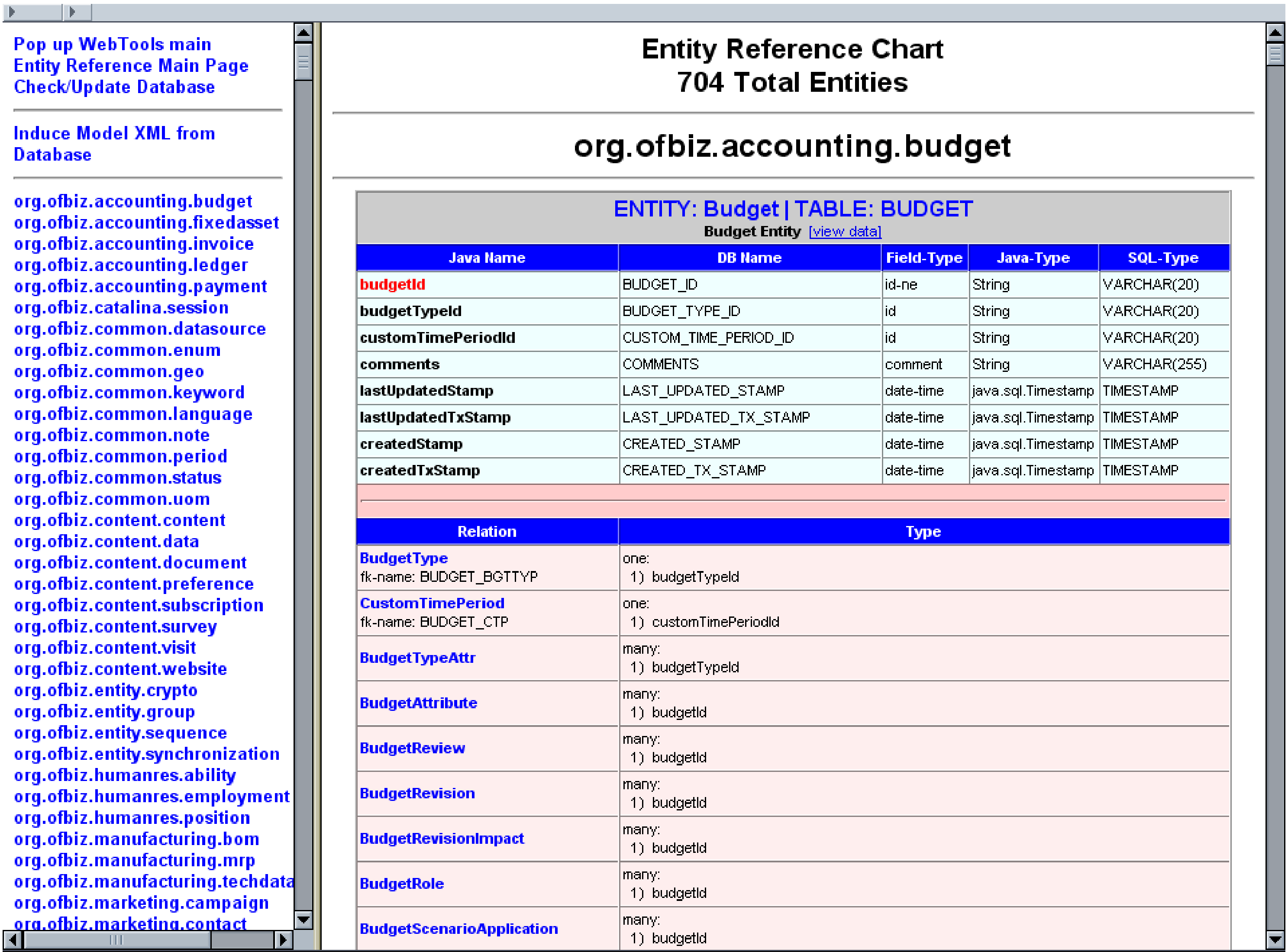
## .4.1.5.2 link buttons

[Find] [View] [Delete] [Create]

## .4.2 Entity Reference and Editing Tools (Static Version)

This complex screen has several parts. The left-hand column is an interactive directory to both tools and data presentations. The right hand column is a concatenated presentation of all the existing Entities, in alphabetical order; they can be scrolled to or accessed by clicking upon the name in the left hand column. The items presented here are in the sequence found in the left hand column.

### .4.2.1 entityref



Pop up WebTools main
Entity Reference Main Page
Check/Update Database

Induce Model XML from Database

org.ofbiz.accounting.budget
org.ofbiz.accounting.fixedasset
org.ofbiz.accounting.invoice
org.ofbiz.accounting.ledger
org.ofbiz.accounting.payment
org.ofbiz.catalina.session
org.ofbiz.common.datasource
org.ofbiz.common.enum
org.ofbiz.common.geo
org.ofbiz.common.keyword
org.ofbiz.common.language
org.ofbiz.common.note
org.ofbiz.common.period
org.ofbiz.common.status
org.ofbiz.common.uom
org.ofbiz.content.content
org.ofbiz.content.data
org.ofbiz.content.document
org.ofbiz.content.preference
org.ofbiz.content.subscription
org.ofbiz.content.survey
org.ofbiz.content.visit
org.ofbiz.content.website
org.ofbiz.entity.crypto
org.ofbiz.entity.group
org.ofbiz.entity.sequence
org.ofbiz.entity.synchronization
org.ofbiz.humanres.ability
org.ofbiz.humanres.employment
org.ofbiz.humanres.position
org.ofbiz.manufacturing.bom
org.ofbiz.manufacturing.mrp
org.ofbiz.manufacturing.techdata
org.ofbiz.marketing.campaign
org.ofbiz.marketing.contact

Entity Reference Chart
704 Total Entities

org.ofbiz.accounting.budget

ENTITY: Budget | TABLE: BUDGET
Budget Entity [view data]

| Java Name | DB Name | Field-Type | Java-Type | SQL-Type |
|---|---|---|---|---|
| budgetId | BUDGET_ID | id-ne | String | VARCHAR(20) |
| budgetTypeId | BUDGET_TYPE_ID | id | String | VARCHAR(20) |
| customTimePeriodId | CUSTOM_TIME_PERIOD_ID | id | String | VARCHAR(20) |
| comments | COMMENTS | comment | String | VARCHAR(255) |
| lastUpdatedStamp | LAST_UPDATED_STAMP | date-time | java.sql.Timestamp | TIMESTAMP |
| lastUpdatedTxStamp | LAST_UPDATED_TX_STAMP | date-time | java.sql.Timestamp | TIMESTAMP |
| createdStamp | CREATED_STAMP | date-time | java.sql.Timestamp | TIMESTAMP |
| createdTxStamp | CREATED_TX_STAMP | date-time | java.sql.Timestamp | TIMESTAMP |

| Relation | Type |
|---|---|
| BudgetType fk-name: BUDGET_BGTTYP | one: 1) budgetTypeId |
| CustomTimePeriod fk-name: BUDGET_CTP | one: 1) customTimePeriodId |
| BudgetTypeAttr | many: 1) budgetTypeId |
| BudgetAttribute | many: 1) budgetId |
| BudgetReview | many: 1) budgetId |
| BudgetRevision | many: 1) budgetId |
| BudgetRevisionImpact | many: 1) budgetId |
| BudgetRole | many: 1) budgetId |
| BudgetScenarioApplication | many: 1) budgetId |

The top of both columns in the Entity Reference Chart are shown here.

### .4.2.2 link buttons

[Pop up WebTools main] [Entity Reference Main Page] [Check/Update Database] [Induce Model XML from Database] [View Data]

### .4.2.3 Popup Web Tools main

Opens a new browser window to the Web Tools main tab. Same as Main, above.

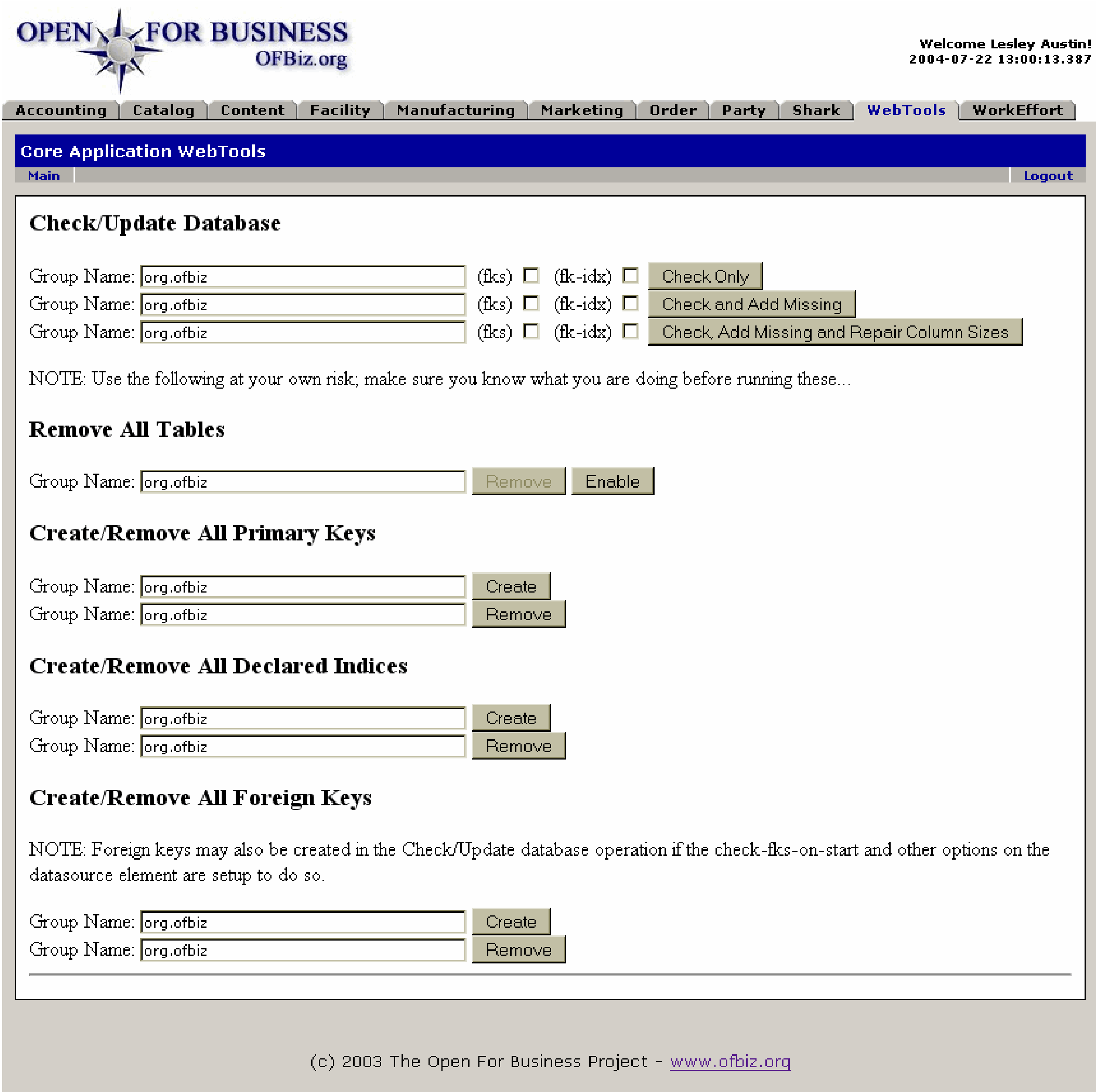
### .4.2.4 Entity Reference Main Page

Refreshes this screen; returns the right hand column to the top item of the opening screen.

### .4.2.5 Check/Update Database

Powerful tool, this will produce sweeping changes across an entire database. USE WITH CAUTION.

## .4.2.5.1 entityref-updateDB




This macro tools makes sweeping changes across an entire database; USE WITH CAUTION.

#### .4.2.5.2 link buttons

[Check Only] [Check and Add Missing] [Check, Add Missing and Repair Column Sizes] [Enable] [Create] [Remove]

#### .4.2.5.3 Check/Update Database

#### .4.2.5.4 Remove All Tables

#### .4.2.5.5 Create/Remove All Primary Keys

#### .4.2.5.6 Create/Remove All Declared Indices

#### .4.2.5.7 Create/Remove All Foreign Keys

### .4.2.6 Generate Entity Model XML (all in one)

Produced in another browser in a popup window. The following is a representation of the generated XML as delivered by the writer.

### .4.2.6.1 ModelWriter

None Copyright (c) 2002 The Open For Business Project - www.ofbiz.org None 1.0 A BillingAccount Payment Method C
InventoryEvent by ProductId to be able to check the product availability and if necessary generate some requirements Usec
InventoryEventPlanned and give the information if it's an in or out event Uses for the MRP process to be able to read the In
billOfMaterialLevel and by eventDate Used to defined the availability of the machines, this entity define the Id and the week
the exception calendar table as reference Used to defined some days which differ from the normal day definition in the week
calendar. Used to defined some weeks which differ from the normal week defined in the calendar. Used to defined the week
machine Note that both includeInTax and includeInShipping should default to true, except in the case where this adjustment
adjustment then should be ignored. Defines which ContactMechPurposeType entites apply to which ContactMechType All
that is in another category that a party/role is related to. So, the party/role is related to the parent category. When using this
product price summary the only columns you should request are: productId, productName, assocProductCount, assocMinI
rest of the field aliases should only be used for specifying constraints since they will break the grouping. Defines a permission
group; there is no FK to SecurityPermission because we want to leave open the possibility of ad-hoc permissions, especially
Maintenance pages which have TONS of permissions Maps a UserLogin to a security group This view is meant for getting
all shipments associated with an order, it does not include information to determine which packages in a given shipment corr
determine what information applies to each line item of the order. Includes PartyRelationship Link so that a partyId can be s
PartyAssignments for all groups the party is in. Also includes PartyRole Link so that if a partyId is specified it will find all Pa
a party is in; does not link on the partyId of the PartyAssignment The primary key of a WorkflowApplication is funny becau
either a WorkflowPackage or a WorkflowProcess. If it is associated with a WorkflowPackage, then the processId will be s
The primary key of a WorkflowDataField is funny because it can be associated with either a WorkflowPackage or a Work
associated with a WorkflowPackage, then the processId will be set to the constant "_NA_". The primary key of a Workflo
because it can be associated with either a WorkflowProcess or a WorkflowApplication. If it is associated with a Workflow
applicationId will be set to the constant "_NA_". Note that if it is associated with a WorkflowApplication, that entity may be
package or a process, so see the description on the WorkflowApplication entity.

Text of a generated Entity Model XML.

### .4.2.7 Save Entity Model XML to Files

Note: screen capture not available.

### .4.2.8 Edit Entity Definitions

Scroll part way down the left hand panel to another listing of all the Entities, each preceded by the link [EditDef]. Click on the associated link and you are taken to a popup window in another browser with this tool.

### .4.2.8.1 EditEntity

OPEN FOR BUSINESS OFBiz.org

Welcome Lesley Austin!
2004-07-22 13:44:25.504

Accounting | Catalog | Content | Facility | Manufacturing | Marketing | Order | Party | Shark | WebTools | WorkEffort

Core Application WebTools

Main | Logout

## Entity Editor

[ ] Edit Specified Entity
[ ] Edit Specified Entity

Entity Name (Java style): [ ]
Entity Group: org.ofbiz  Create Entity

Reload Current Entity: KeywordThesaurus

| | |
|---|---|
| Entity Name | KeywordThesaurus |
| Table Name | KEYWORD_THESAURUS |
| Table Name | KEYWORD_THESAURUS |
| Package Name | org.ofbiz.common.keyword |
| Dependent On Entity | |
| Title | Entity of an Open For Business Project Component |
| Description | None |
| Copyright | Copyright (c) 2002 The Open For Business Project - www.ofbiz.o |
| Author | None |
| Version | 1.0 |
| Group | org.ofbiz (This group is for the "default" delegator) |
| Resource Loader | main |
| Location | entitydef/entitymodel.xml |

Update Entity

### FIELDS

| Field Name | Column Name (Length) | Field Type | | | |
|---|---|---|---|---|---|
| **enteredKeyword** | ENTERED_KEYWORD (15) | long-varchar | ☑ long-varchar | Set | Remove |
| **alternateKeyword** | ALTERNATE_KEYWORD (17) | long-varchar | ☑ long-varchar | Set | Remove |
| relationshipEnumId | RELATIONSHIP_ENUM_ID (20) | id | ☐ id | Set | Remove |
| lastUpdatedStamp | LAST_UPDATED_STAMP (18) | date-time | ☐ date-time | Set | Remove |
| lastUpdatedTxStamp | LAST_UPDATED_TX_STAMP (21) | date-time | ☐ date-time | Set | Remove |
| createdStamp | CREATED_STAMP (13) | date-time | ☐ date-time | Set | Remove |
| createdTxStamp | CREATED_TX_STAMP (16) | date-time | ☐ date-time | Set | Remove |

Add new field with Field Name (Java style) and field type.
[ ] blob  Create

### RELATIONSHIPS

| | | | | | |
|---|---|---|---|---|---|
| Relationship**Enumeration** | Relationship / KW_THRS_RLENM / one | Set | Remove | Add KeyMap | Add Reverse |
| | Main: relationshipEnumId Related: enumId | Set | Remove | | |

Add new relation with Title, FK Name, Related Entity Name* and Relation Type*.
[ ] [ ] [ ] one  Create



Edit details and aspects of a specific Entity with this tool.

### .4.2.8.2 link buttons

[Edit Specified Entity] [Create Entity] [Reload Current Entity: Nnnnn] [Update Entity] [Set] [Remove] [Create] [Add KeyMap] [Add Reverse]

### .4.2.8.3 Entity Editor

### .4.2.8.4 Fields

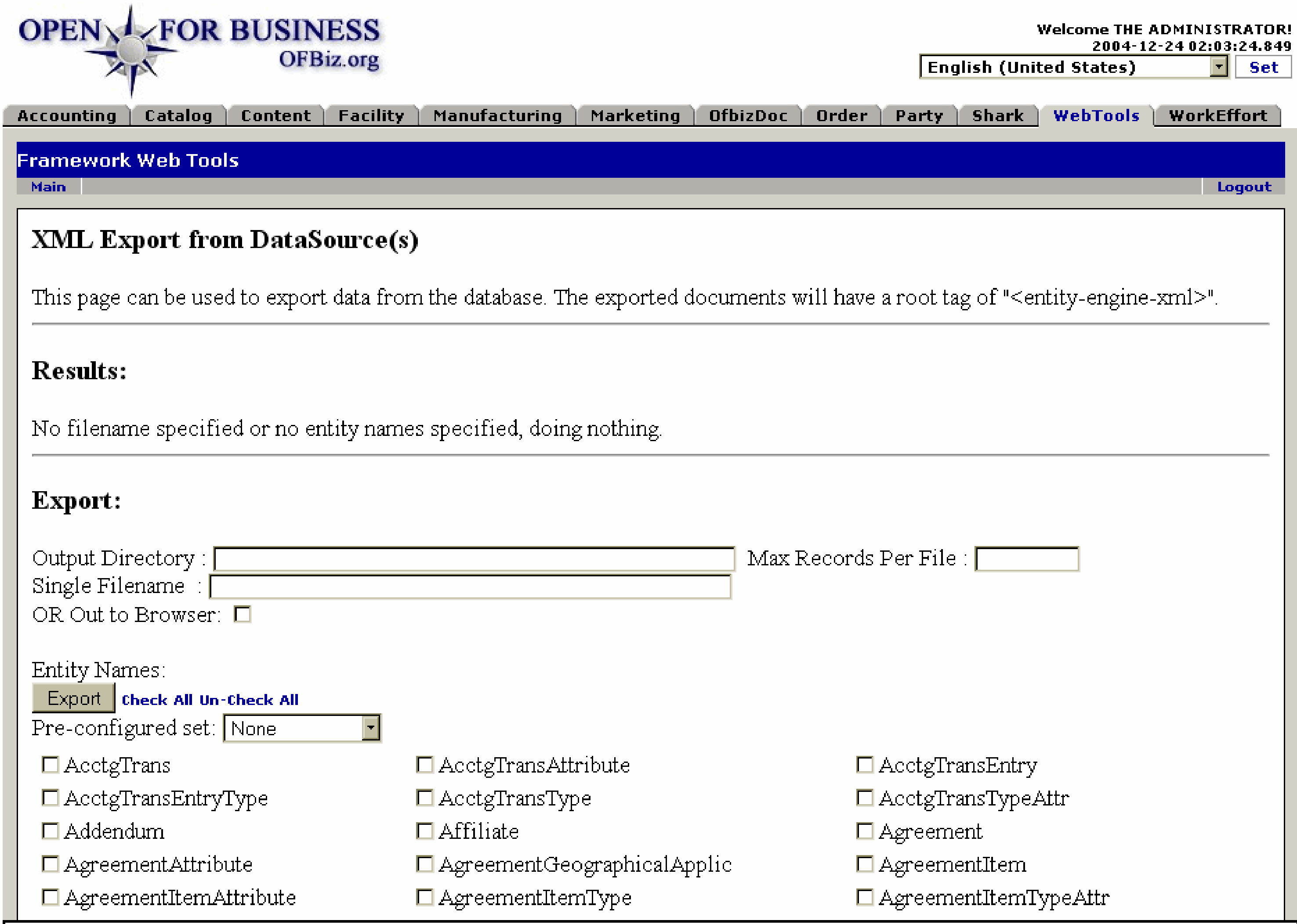
### .4.2.8.5 Relationships

## .4.2.9 Induce Model XML from Database

Note: screen capture not available.

# .4.3 XML Data Export

## .4.3.1 xmldsdump




This very large screen (truncated here) includes over 600 entities which can be selected in any combination for export.

## .4.3.2 link buttons

[Export] [Check All] [Uncheck All]

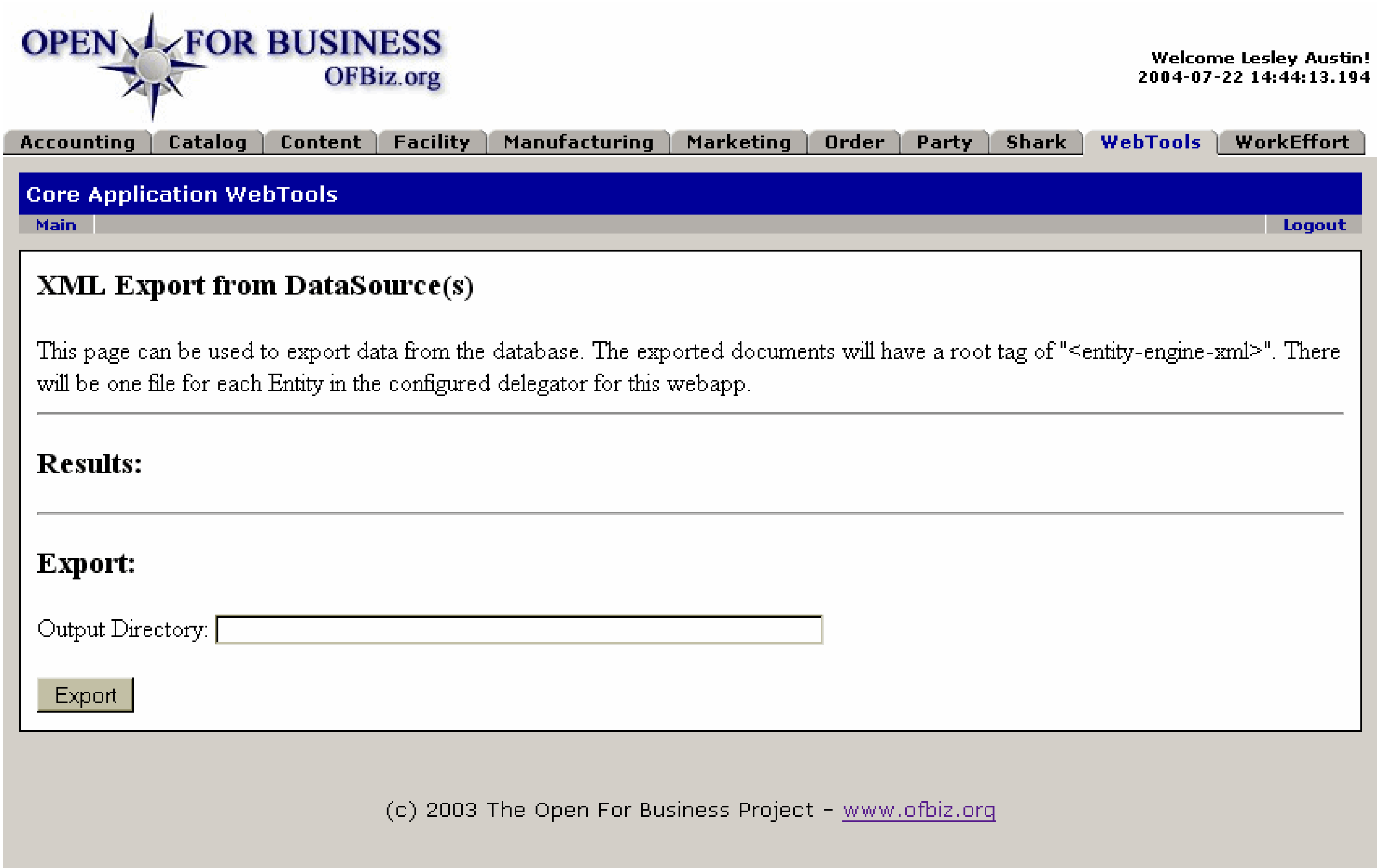
## .4.3.3 XML Export from DataSource(s)

Used to export data from the database. Check boxes on the Entity(ies) you wish to have exported, or [Check All].

## .4.4 XML Data Export All

Use this quicker method to export all of the XML. Effectively the same tool as the one above but without the checkboxes for each of the entities.

### .4.4.1 xmldsdumpall



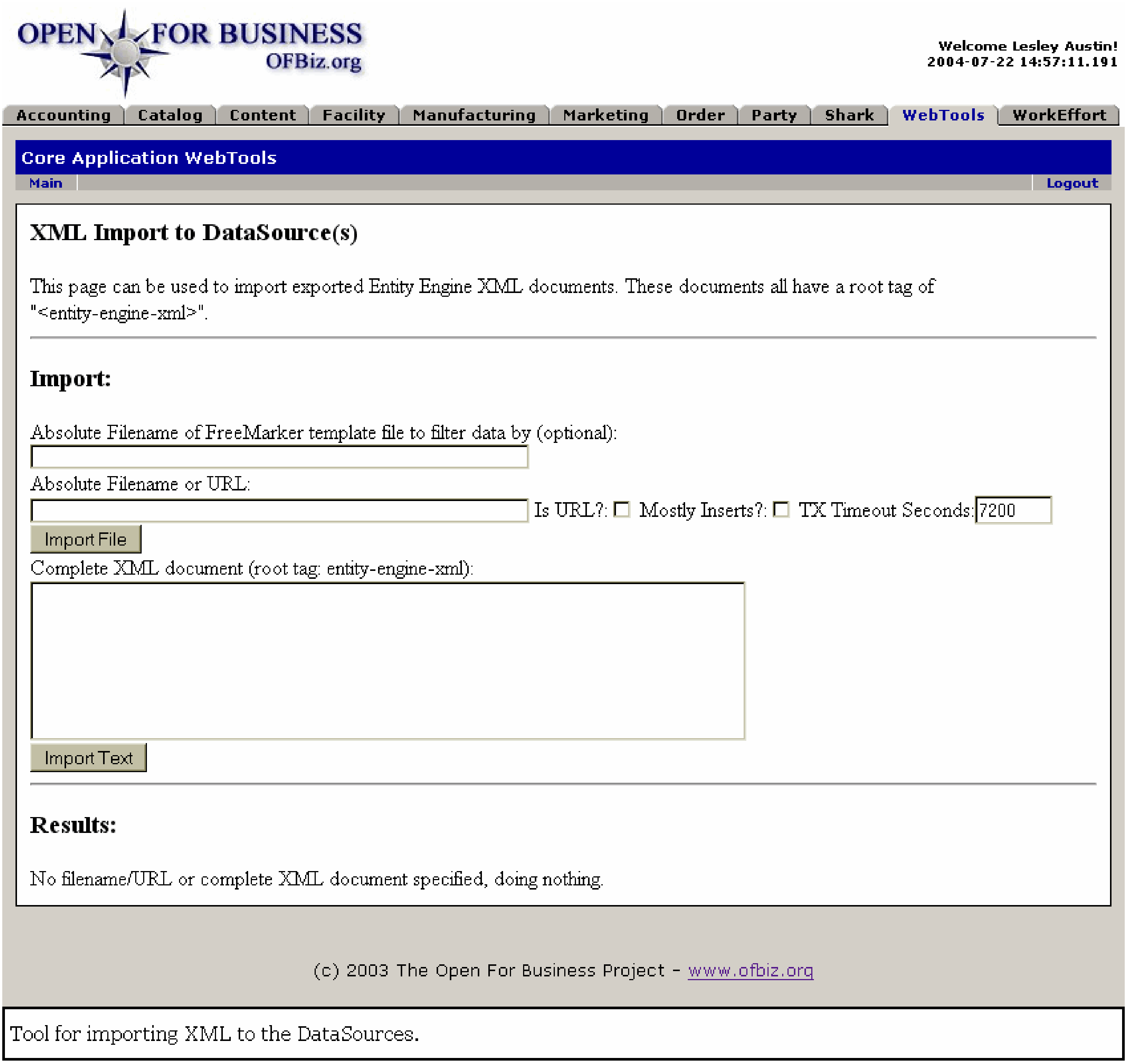

The quickest way to export all XML from the DataSources.

### .4.4.2 link buttons

[Export]

## .4.5 XML Data Import

### .4.5.1 xmldsimport



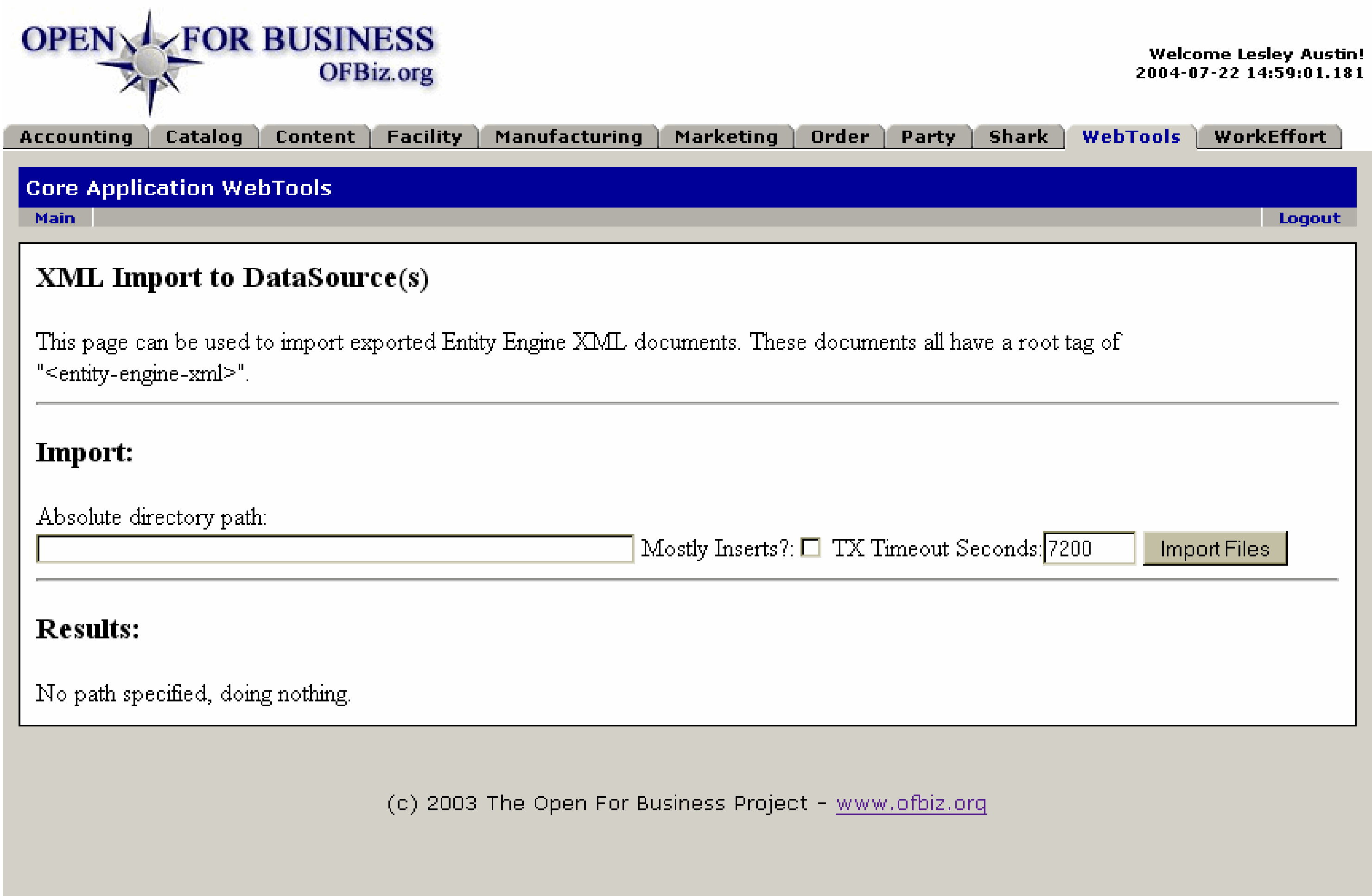

### .4.5.2 link buttons

[Import File] [Import Text]

## .4.6 XML Data Import Dir

This would be used for importing those datasources which have already been exported from elsewhere to your application.

### .4.6.1 xmldsimportdir




This page can be used to import exported Entity Engine XML documents.

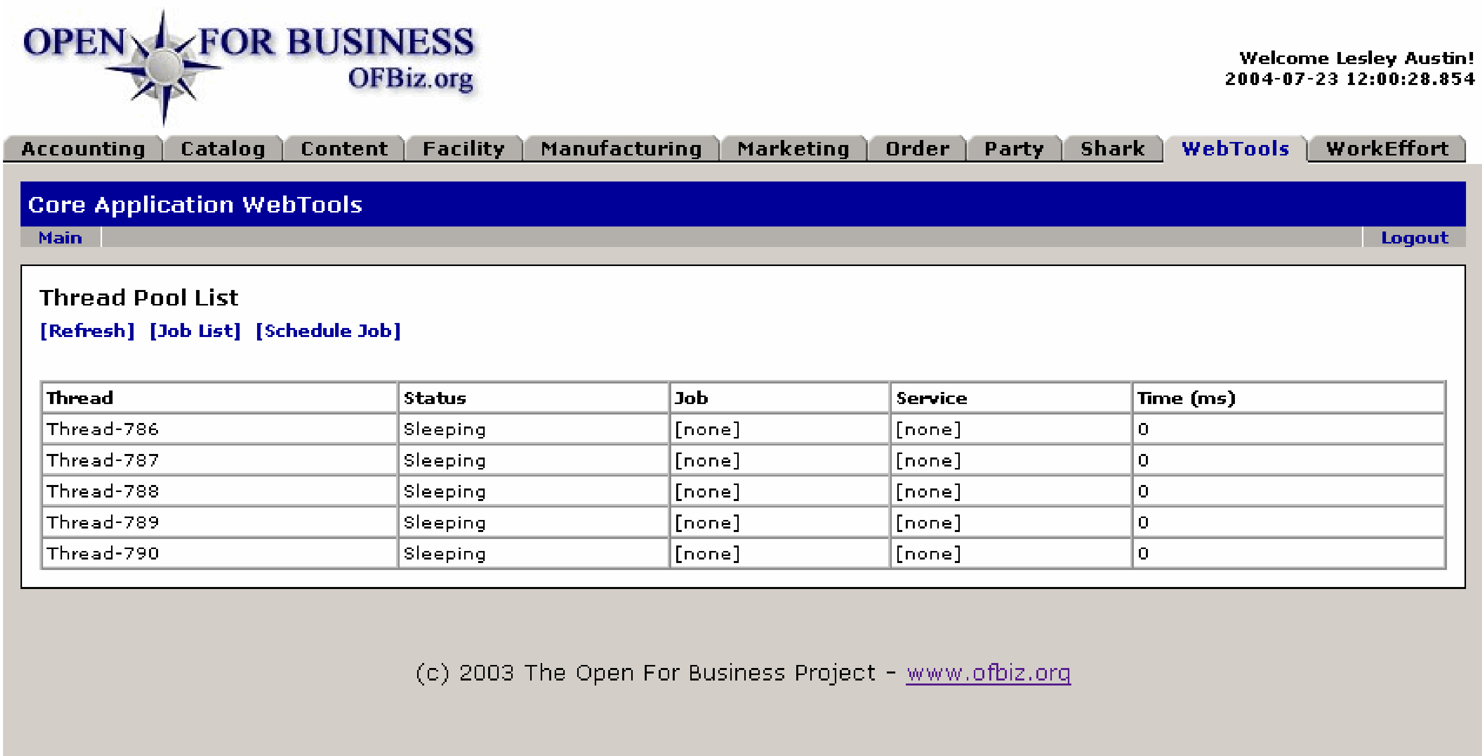
### .4.6.2 link buttons

[Import Files]

## .5 Service Engine Tools

## .5.1 Thread List

### .5.1.1 threadList




| Thread | Status | Job | Service | Time (ms) |
|---|---|---|---|---|
| Thread-786 | Sleeping | [none] | [none] | 0 |
| Thread-787 | Sleeping | [none] | [none] | 0 |
| Thread-788 | Sleeping | [none] | [none] | 0 |
| Thread-789 | Sleeping | [none] | [none] | 0 |
| Thread-790 | Sleeping | [none] | [none] | 0 |



Threads currently available in the Thread Pool list.

### .5.1.2 link buttons

[Refresh] [Job List] [Schedule Job]

### .5.1.3 Thread

### .5.1.4 Status

### .5.1.5 Job

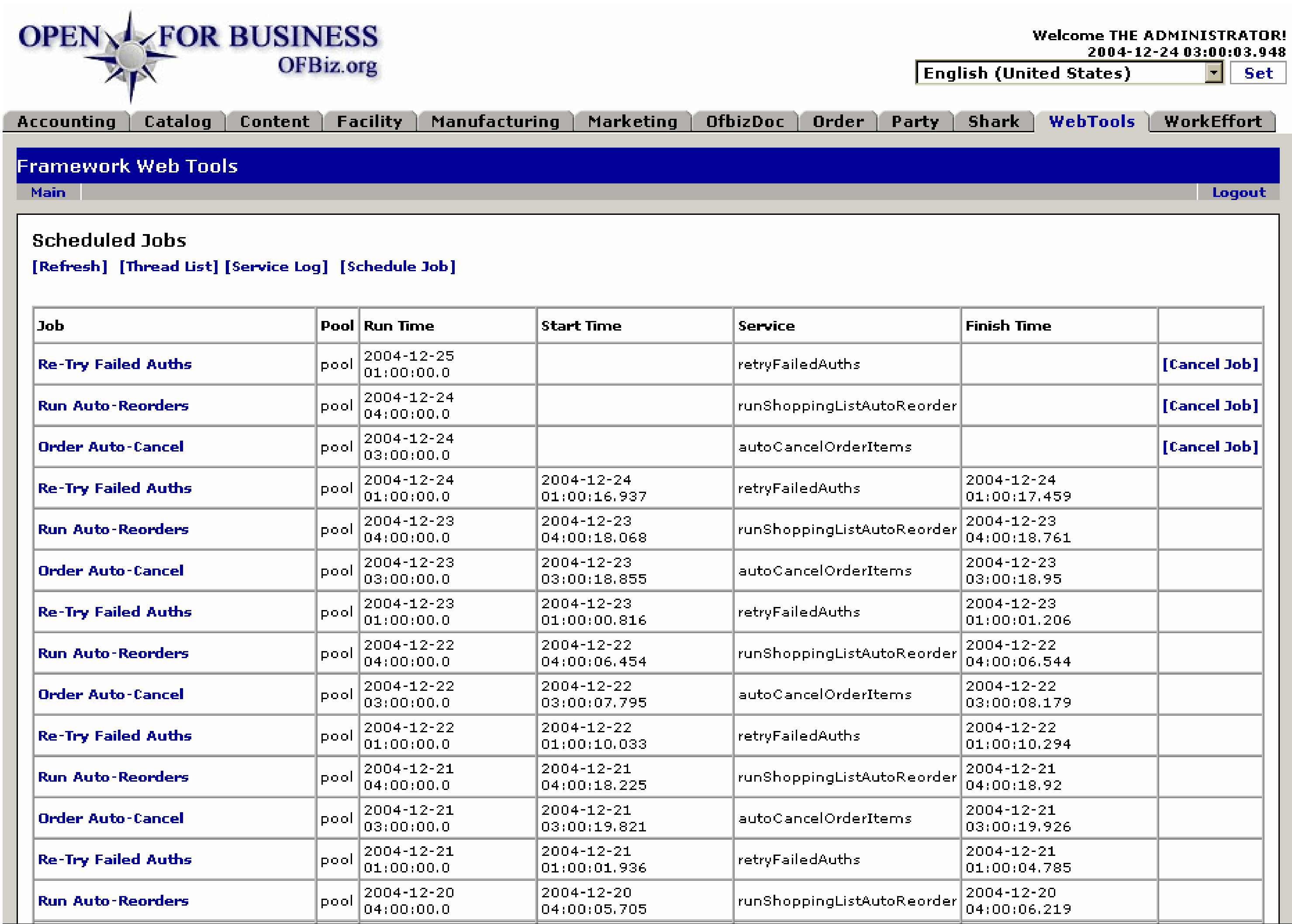
### .5.1.6 Service

### .5.1.7 Time (ms)

## .5.2 Job List - Scheduled Jobs

This is a truncated view of a long list of jobs. Within the list, following the listing of pending jobs, is a historical list of completed jobs.

## .5.2.1 jobList




Scheduled Jobs

[Refresh] [Thread List] [Service Log] [Schedule Job]

| Job | Pool | Run Time | Start Time | Service | Finish Time | |
|---|---|---|---|---|---|---|
| Re-Try Failed Auths | pool | 2004-12-25 01:00:00.0 | | retryFailedAuths | | [Cancel Job] |
| Run Auto-Reorders | pool | 2004-12-24 04:00:00.0 | | runShoppingListAutoReorder | | [Cancel Job] |
| Order Auto-Cancel | pool | 2004-12-24 03:00:00.0 | | autoCancelOrderItems | | [Cancel Job] |
| Re-Try Failed Auths | pool | 2004-12-24 01:00:00.0 | 2004-12-24 01:00:16.937 | retryFailedAuths | 2004-12-24 01:00:17.459 | |
| Run Auto-Reorders | pool | 2004-12-23 04:00:00.0 | 2004-12-23 04:00:18.068 | runShoppingListAutoReorder | 2004-12-23 04:00:18.761 | |
| Order Auto-Cancel | pool | 2004-12-23 03:00:00.0 | 2004-12-23 03:00:18.855 | autoCancelOrderItems | 2004-12-23 03:00:18.95 | |
| Re-Try Failed Auths | pool | 2004-12-23 01:00:00.0 | 2004-12-23 01:00:00.816 | retryFailedAuths | 2004-12-23 01:00:01.206 | |
| Run Auto-Reorders | pool | 2004-12-22 04:00:00.0 | 2004-12-22 04:00:06.454 | runShoppingListAutoReorder | 2004-12-22 04:00:06.544 | |
| Order Auto-Cancel | pool | 2004-12-22 03:00:00.0 | 2004-12-22 03:00:07.795 | autoCancelOrderItems | 2004-12-22 03:00:08.179 | |
| Re-Try Failed Auths | pool | 2004-12-22 01:00:00.0 | 2004-12-22 01:00:10.033 | retryFailedAuths | 2004-12-22 01:00:10.294 | |
| Run Auto-Reorders | pool | 2004-12-21 04:00:00.0 | 2004-12-21 04:00:18.225 | runShoppingListAutoReorder | 2004-12-21 04:00:18.92 | |
| Order Auto-Cancel | pool | 2004-12-21 03:00:00.0 | 2004-12-21 03:00:19.821 | autoCancelOrderItems | 2004-12-21 03:00:19.926 | |
| Re-Try Failed Auths | pool | 2004-12-21 01:00:00.0 | 2004-12-21 01:00:01.936 | retryFailedAuths | 2004-12-21 01:00:04.785 | |
| Run Auto-Reorders | pool | 2004-12-20 04:00:00.0 | 2004-12-20 04:00:05.705 | runShoppingListAutoReorder | 2004-12-20 04:00:06.219 | |

Partial view of a long list of jobs. The top three are currently scheduled; all the rest are completed with dates and times.

## .5.2.2 link buttons

[Refresh] [Schedule Job] [Thread List] [Cancel Job]

#### .5.2.3 Job

#### .5.2.4 Pool

#### .5.2.5 Run Time

#### .5.2.6 Start Time

#### .5.2.7 Service

#### .5.2.8 Finish Time

### .5.3 Schedule Job

A few steps are required to schedule a job. Only the first two steps are given here.

## .5.3.1 scheduleJob-1


Step 1 in scheduling a job is to enter the Service and Recurrence information.

## .5.3.2 link buttons

[Submit]

## .5.3.3 Step 1: Service and Recurrence Information

### .5.3.3.1 Service

### .5.3.3.2 Pool Name

### .5.3.3.3 Start Date/Time (popup calendar)

### .5.3.3.4 Finish Date/Time (popup calendar)

### .5.3.3.5 Frequency (drop-down box)

### .5.3.3.6 Interval

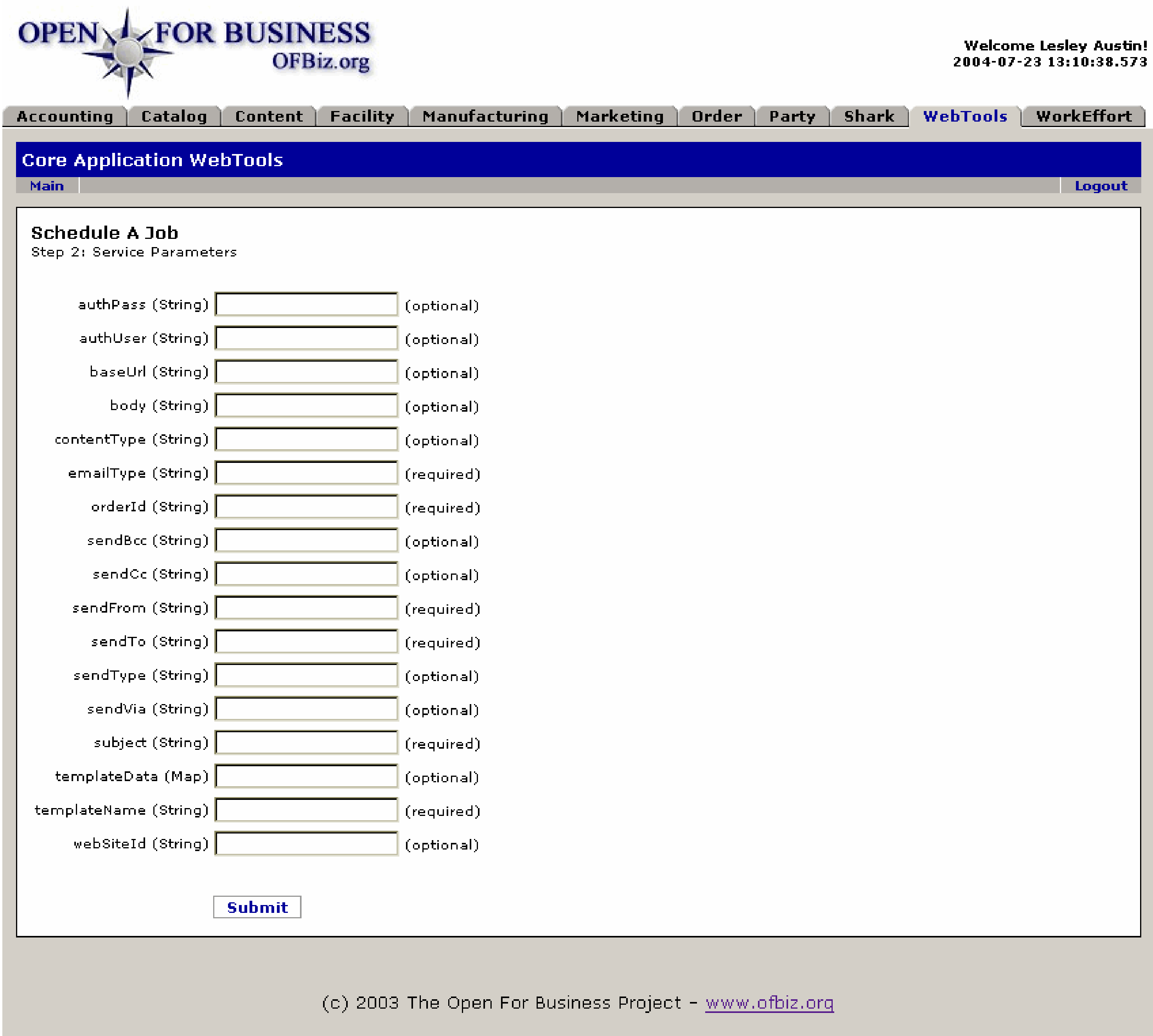
### .5.3.3.7 Count

### .5.3.3.8 Max Retry

## .5.3.4 Step 2 - Service Parameters

Various strings are to be entered, some required, others optional.

### .5.3.4.1 scheduleJob-2




Step 2 in scheduling a job involves entering various required and optional strings.

### .5.3.4.2 link buttons

[Submit]

# .6 Workflow Engine Tools(Old)

## .6.1 Workflow Monitor

Only currently-running workflows are presented in this monitoring tool.

### .6.1.1 workflowMonitor


The Monitor is used to view the current status of running/active workflows.

### .6.1.2 link buttons

- no link buttons -

### .6.1.3 Package/Version

### .6.1.4 Process/Version

### .6.1.5 Current Status

### .6.1.6 Priority

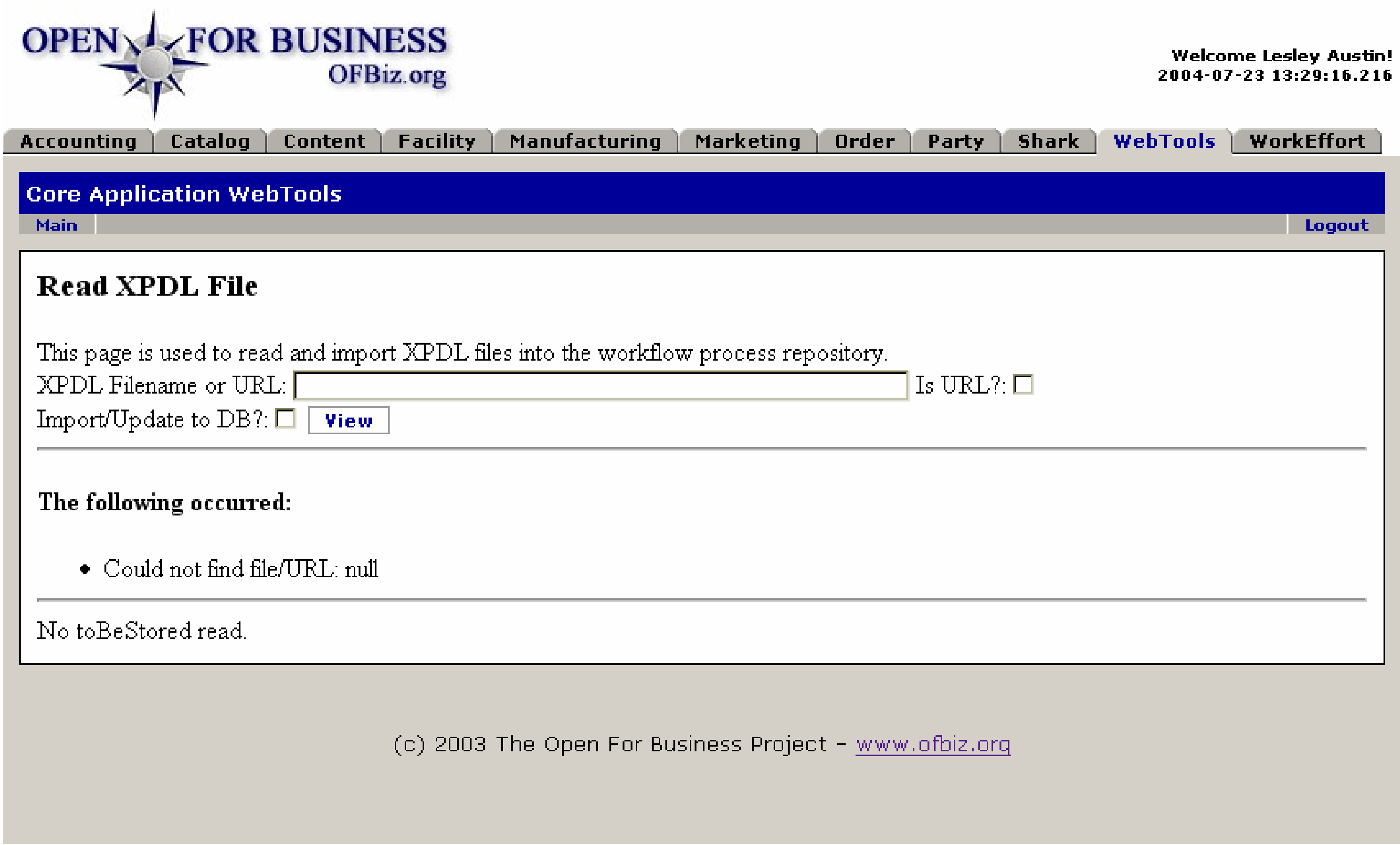
### .6.1.7 Actual StartDate

### .6.1.8 Source Reference ID

## .6.2 Read XPDL File

This page is used to read and import XPDL files into the workflow process repository. After entering the Filename or URL and checking the appropriate boxes, click on View. If the process is not successful, 'The following occurred:' message will explain.

### .6.2.1 readxpdl




Both reading and importing XPDL files can be accomplished from this screen.

### .6.2.2 link buttons

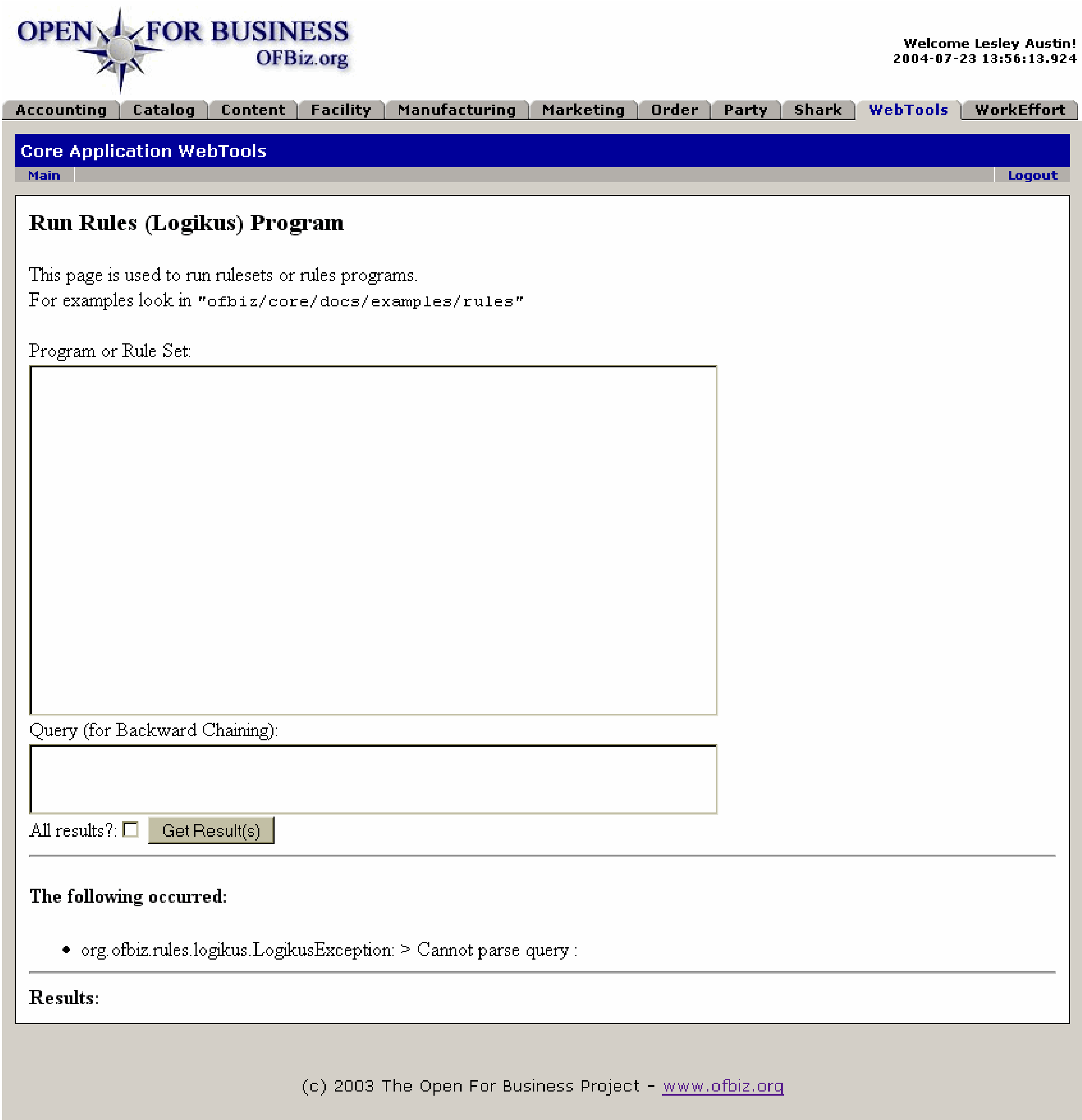
[View]

# .7 Rule Engine Tools(Old)

## .7.1 Logikus- Run Rulesets

This page is used to run rulesets or rules programs.

## .7.1.1 logikus




Rulesets or rules programs are run from this page.

### .7.1.2 link buttons

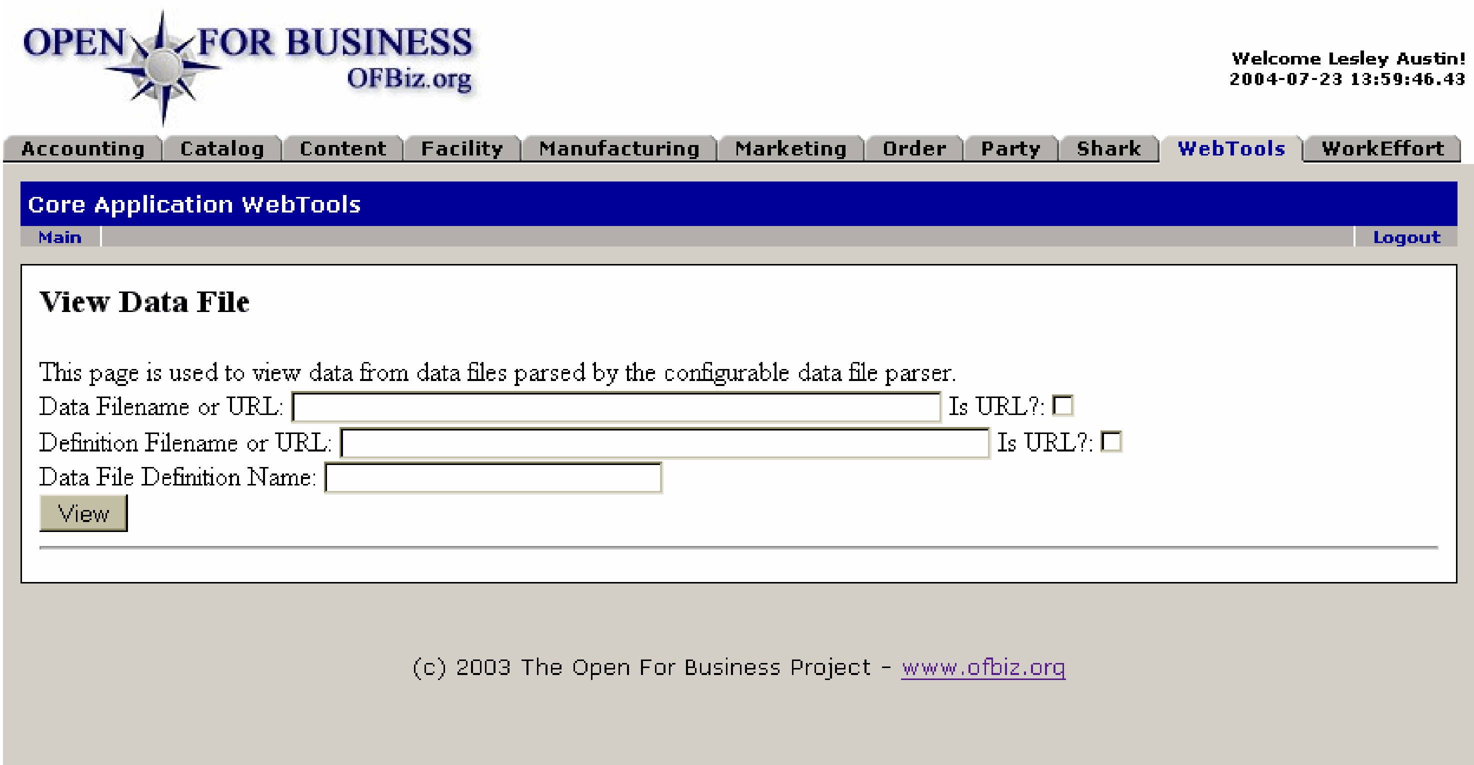
[Get Result(s)]

## .8 Data File Tools

### .8.1 View Data File

This page is used to view data from data files parsed by the configurable data file parser.

### .8.1.1 viewdatafile




Data Files can be viewed from this page if they have been parsed by the configurable data file parser.

### .8.1.2 link buttons

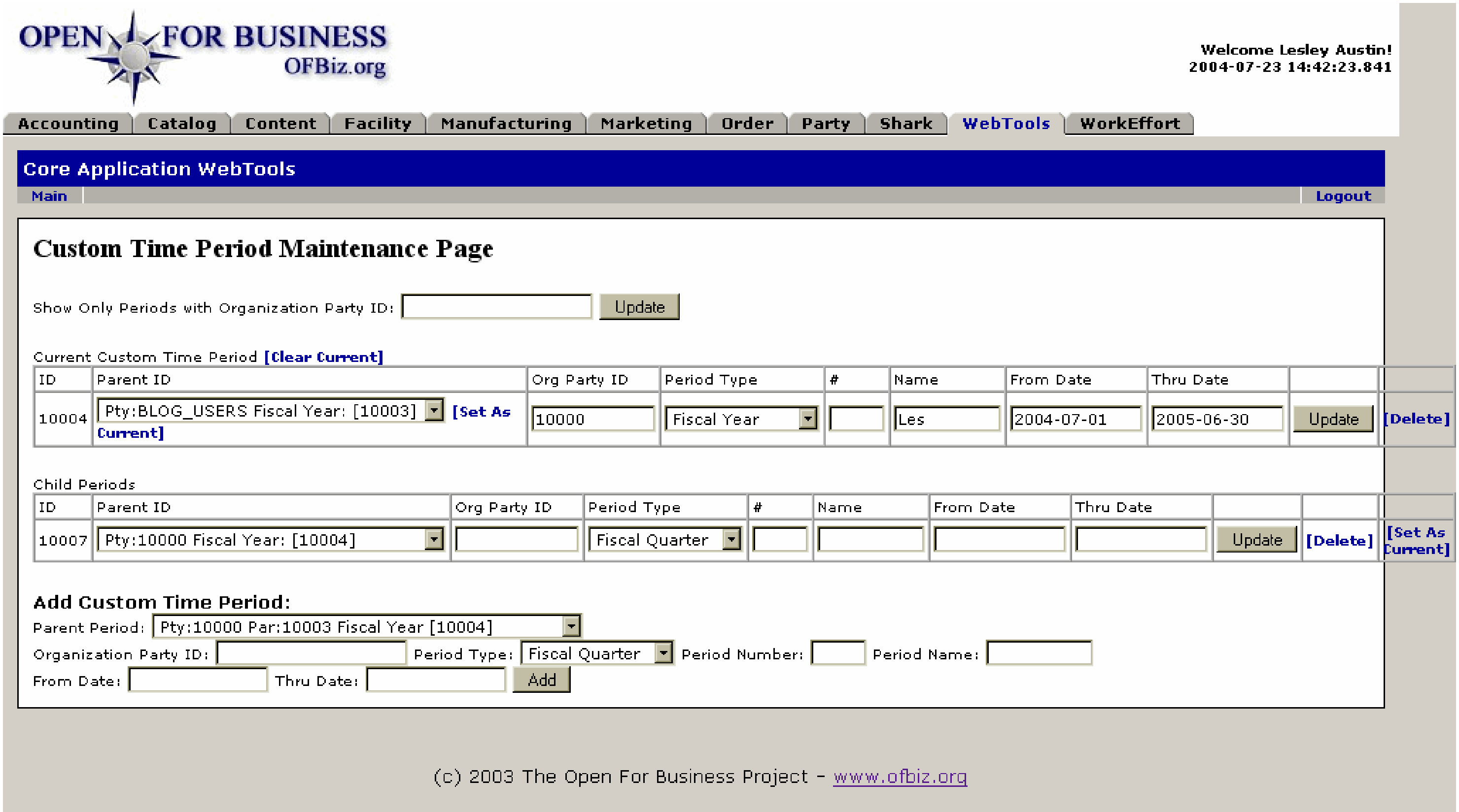
[View]

## .9 Misc. Setup Tools

## .9.1 Edit Custom Time Periods >> Custom Time Period Maint. Pg.

First establish the Parent time period, then add the custom time period as a child.

### .9.1.1 createCustomTimePeriod




This maintenance page helps you create and edit a custom time period.

### .9.1.2 link buttons

[Add] [Update] [Set As Current] [Clear Current] [Delete]

## .9.2 Edit Enumerations

Not currently accessible.

## .9.3 Edit Status Options

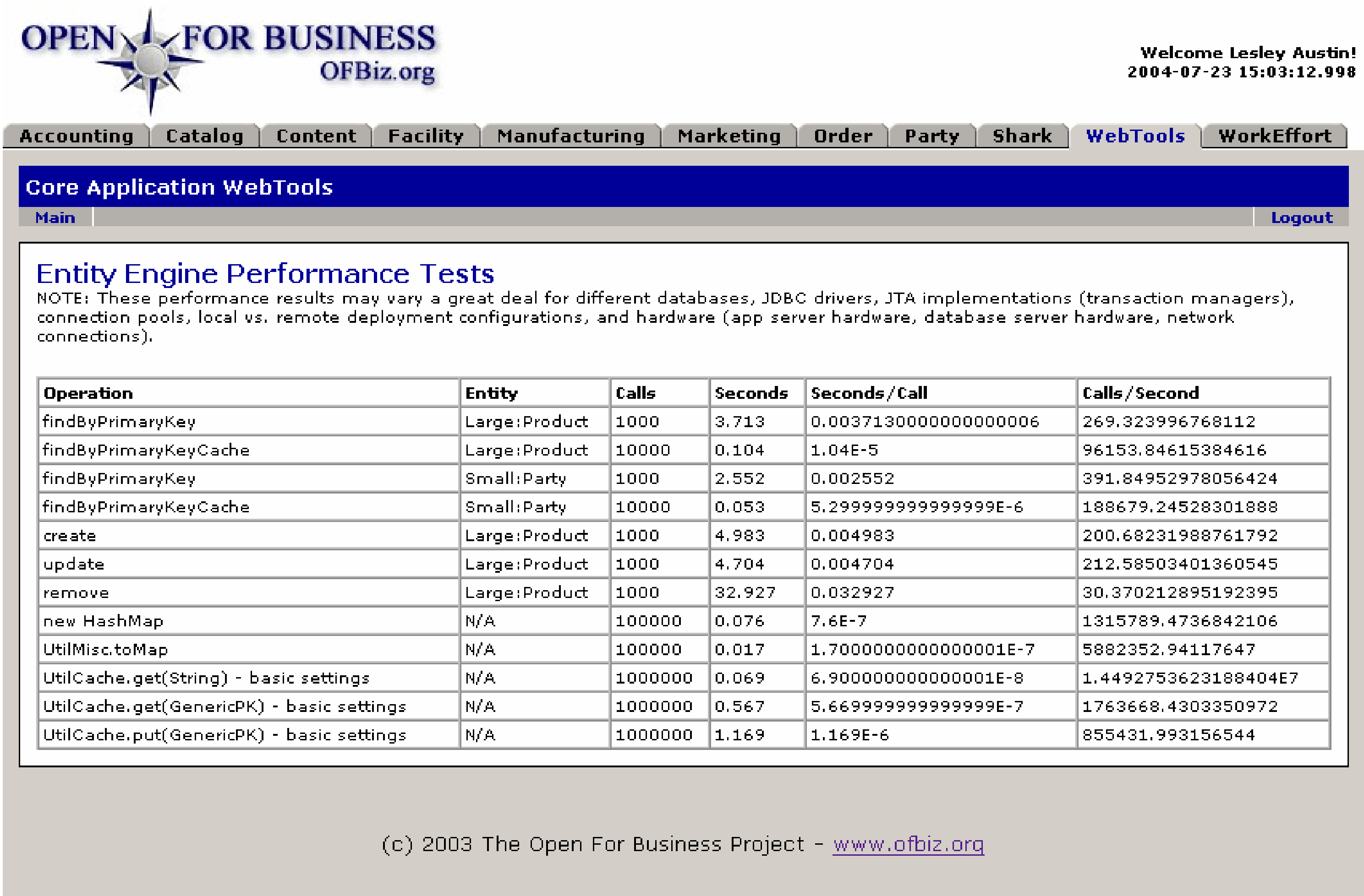
Not currently accessible.

# .10 Performance Tests

## .10.1 Entity Engine

Upon invoking this tool, allow time for the testing to process before the results are presented. These performance results may vary a great deal for different databases, JDBC drivers, JTA implementations (transaction managers), connection pools, local vs. remote deployment configurations, and hardware (app server hardware, database server hardware, network connections).

### .10.1.1 EntityPerformanceTest




| Operation | Entity | Calls | Seconds | Seconds/Call | Calls/Second |
|---|---|---|---|---|---|
| findByPrimaryKey | Large:Product | 1000 | 3.713 | 0.0037130000000000006 | 269.323996768112 |
| findByPrimaryKeyCache | Large:Product | 10000 | 0.104 | 1.04E-5 | 96153.84615384616 |
| findByPrimaryKey | Small:Party | 1000 | 2.552 | 0.002552 | 391.84952978056424 |
| findByPrimaryKeyCache | Small:Party | 10000 | 0.053 | 5.299999999999999E-6 | 188679.24528301888 |
| create | Large:Product | 1000 | 4.983 | 0.004983 | 200.68231988761792 |
| update | Large:Product | 1000 | 4.704 | 0.004704 | 212.58503401360545 |
| remove | Large:Product | 1000 | 32.927 | 0.032927 | 30.370212895192395 |
| new HashMap | N/A | 100000 | 0.076 | 7.6E-7 | 1315789.4736842106 |
| UtilMisc.toMap | N/A | 100000 | 0.017 | 1.7000000000000001E-7 | 5882352.94117647 |
| UtilCache.get(String) - basic settings | N/A | 1000000 | 0.069 | 6.900000000000001E-8 | 1.4492753623188404E7 |
| UtilCache.get(GenericPK) - basic settings | N/A | 1000000 | 0.567 | 5.669999999999999E-7 | 1763668.4303350972 |
| UtilCache.put(GenericPK) - basic settings | N/A | 1000000 | 1.169 | 1.169E-6 | 855431.993156544 |

This tests your currently-operating entity engine performance and reports back the results.

### .10.1.2 link buttons

- no links -

### .10.1.3 Operations

### .10.1.4 Entity

### .10.1.5 Calls

### .10.1.6 Seconds

### .10.1.7 Seconds/Call

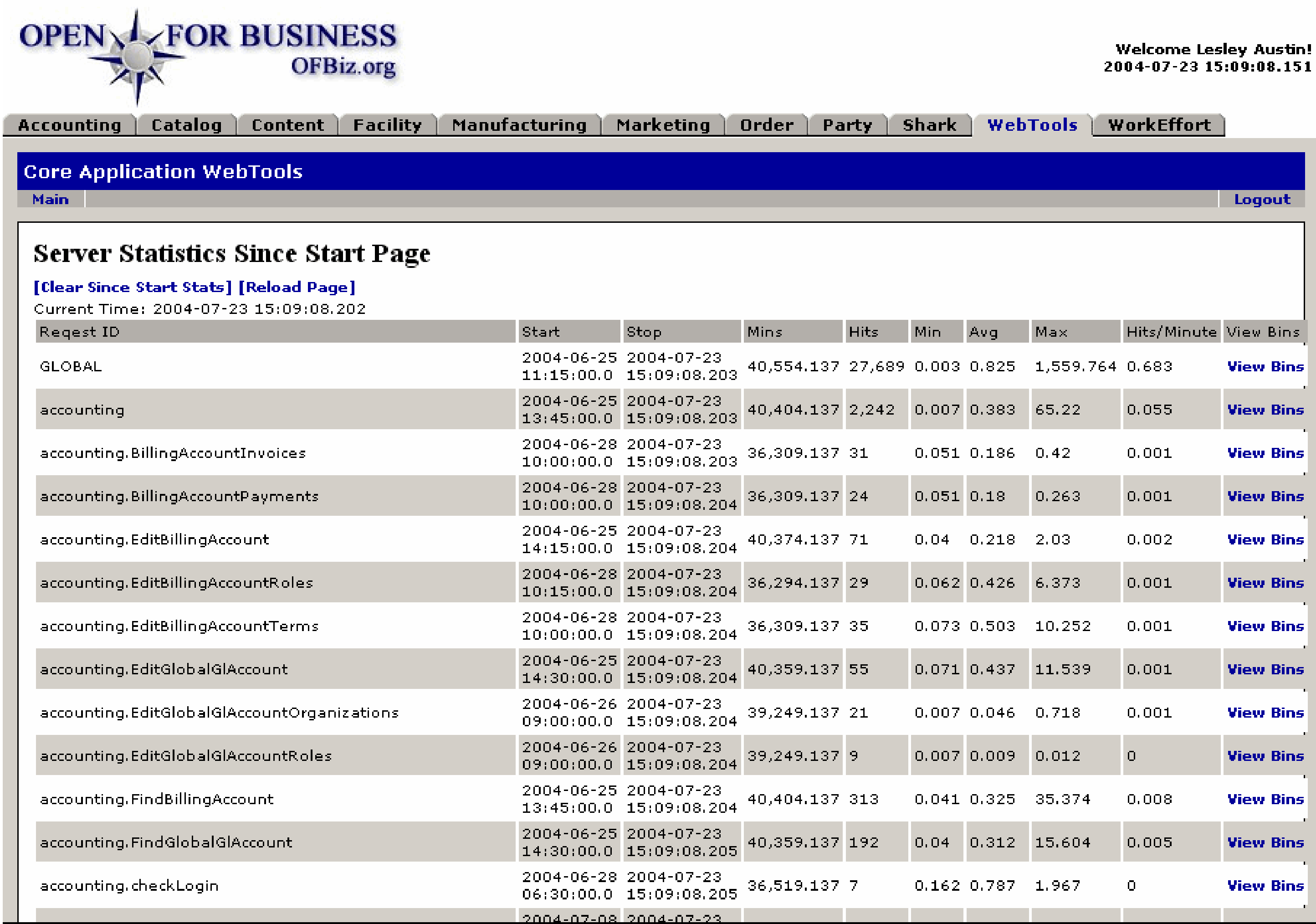
### .10.1.8 Calls/Second

# .11 Server Hit Statistics Tools

## .11.1 Stats Since Server Start

This lengthy report actually has three sections with identical headings for Request ID, Event ID, and View ID.

## .11.1.1 StatsSinceStart




| Reqest ID | Start | Stop | Mins | Hits | Min | Avg | Max | Hits/Minute | View Bins |
|---|---|---|---|---|---|---|---|---|---|
| GLOBAL | 2004-06-25 11:15:00.0 | 2004-07-23 15:09:08.203 | 40,554.137 | 27,689 | 0.003 | 0.825 | 1,559.764 | 0.683 | View Bins |
| accounting | 2004-06-25 13:45:00.0 | 2004-07-23 15:09:08.203 | 40,404.137 | 2,242 | 0.007 | 0.383 | 65.22 | 0.055 | View Bins |
| accounting.BillingAccountInvoices | 2004-06-28 10:00:00.0 | 2004-07-23 15:09:08.203 | 36,309.137 | 31 | 0.051 | 0.186 | 0.42 | 0.001 | View Bins |
| accounting.BillingAccountPayments | 2004-06-28 10:00:00.0 | 2004-07-23 15:09:08.204 | 36,309.137 | 24 | 0.051 | 0.18 | 0.263 | 0.001 | View Bins |
| accounting.EditBillingAccount | 2004-06-25 14:15:00.0 | 2004-07-23 15:09:08.204 | 40,374.137 | 71 | 0.04 | 0.218 | 2.03 | 0.002 | View Bins |
| accounting.EditBillingAccountRoles | 2004-06-28 10:15:00.0 | 2004-07-23 15:09:08.204 | 36,294.137 | 29 | 0.062 | 0.426 | 6.373 | 0.001 | View Bins |
| accounting.EditBillingAccountTerms | 2004-06-28 10:00:00.0 | 2004-07-23 15:09:08.204 | 36,309.137 | 35 | 0.073 | 0.503 | 10.252 | 0.001 | View Bins |
| accounting.EditGlobalGlAccount | 2004-06-25 14:30:00.0 | 2004-07-23 15:09:08.204 | 40,359.137 | 55 | 0.071 | 0.437 | 11.539 | 0.001 | View Bins |
| accounting.EditGlobalGlAccountOrganizations | 2004-06-26 09:00:00.0 | 2004-07-23 15:09:08.204 | 39,249.137 | 21 | 0.007 | 0.046 | 0.718 | 0.001 | View Bins |
| accounting.EditGlobalGlAccountRoles | 2004-06-26 09:00:00.0 | 2004-07-23 15:09:08.204 | 39,249.137 | 9 | 0.007 | 0.009 | 0.012 | 0 | View Bins |
| accounting.FindBillingAccount | 2004-06-25 13:45:00.0 | 2004-07-23 15:09:08.204 | 40,404.137 | 313 | 0.041 | 0.325 | 35.374 | 0.008 | View Bins |
| accounting.FindGlobalGlAccount | 2004-06-25 14:30:00.0 | 2004-07-23 15:09:08.205 | 40,359.137 | 192 | 0.04 | 0.312 | 15.604 | 0.005 | View Bins |
| accounting.checkLogin | 2004-06-28 06:30:00.0 | 2004-07-23 15:09:08.205 | 36,519.137 | 7 | 0.162 | 0.787 | 1.967 | 0 | View Bins |
| | 2004-07-08 | 2004-07-23 | | | | | | | |

Partial view of the Server Statistics page showing activity time and hits upon the entities.

## .11.1.2 link buttons

[View Bins] [Clear Since Start Stats] [Reload Page]

### .11.1.3 Request ID \ Event ID \ View ID

#### .11.1.3.1 Start

#### .11.1.3.2 Stop

#### .11.1.3.3 Mins

#### .11.1.3.4 Hits

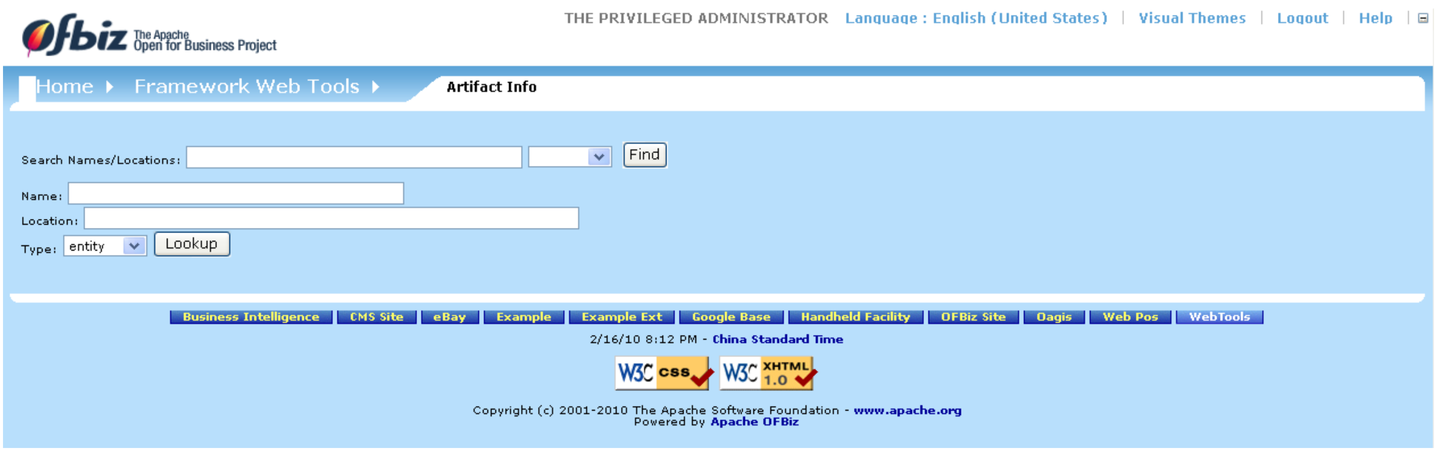
#### .11.1.3.5 Min

#### .11.1.3.6 Avg

#### .11.1.3.7 Max

.11.1.3.8 Hits/Min

## .12 Artifact Info



# .13 Temporal Expression

## .13.1 Temporal Expression

The Apache Open For Business recurring events are based on *Temporal Expressions* - a design proposed by Martin Fowler: Recurring Events for Calendars (pdf). The design is extremely flexible and it allows for arbitrarily complex recurring events.

### .13.1.1 Overview

Each temporal expression could be considered a rule - like "every Monday" or "the 15th of the month." Temporal expressions can used alone or they can be combined in any of three *collection expressions* - Union, Intersection, and Difference. A date will match a Union collection if any of its member expressions match (logical OR). A date will match an Intersection collection if all of its member expressions match (logical AND). A date will match a Difference collection if it matches the *included* member expression and doesn't match the *excluded* member expression (logical AND NOT).

Some of the basic OFBiz temporal expressions are ranges - which simplifies expression creation. For example, if an event occurs every Monday, Tuesday, and Wednesday, you *could* create an expression for each day and make them members of a Union expression, *or* you could use a single Day Of Week Range expression that includes Monday through Wednesday. Sometimes recurring events need to be rescheduled - like when they fall on a holiday, or when maintenance is being performed. The Substitution expression can be used to reschedule recurring events.

In the temporal expression definitions that follow, the expressions will use this notation:

```
Expression(parameter1, parameter2, ...)


Collection:
  Member Expression(parameter1, parameter2, ...)
  Member Expression(parameter1, parameter2, ...)
```

## .13.1.2 Basic Expressions

### .13.1.2.1 Range Expressions

```
MinuteRange(start, end)
HourRange(start, end)
DayOfWeekRange(start, end)
DayOfMonthRange(start, end)
MonthRange(start, end)
DateRange(start, end)
```

**Range Examples**

An event that occurs during the 3 o'clock PM hour:

```
HourRange(15, 15)
```

An event that occurs on Monday, Tuesday, and Wednesday:

```
DayOfWeekRange(Monday, Wednesday)
```

### .13.1.2.2 Day In Month Expression

```
DayInMonth(day of week, occurance)
```

**Day In Month Examples**

An event that occurs on the first Monday of the month:

```
DayInMonth(Monday, 1)
```

An event that occurs on the fourth Thursday of the month:

```
DayInMonth(Thursday, 4)
```

An event that occurs on the last Saturday of the month:

```
DayInMonth(Saturday, -1)
```

### .13.1.2.3 Frequency Expression

```
Frequency(start date-time, frequency type, frequency count)
```

**Frequency Examples**

An event that occurs every day beginning January 1, 2010:

```
Frequency(2010-01-01, day, 1)
```

An event that occurs every two weeks beginning January 1, 2010:

```
Frequency(2010-01-01, day, 14)
```

## .13.1.3 Expression Collections

Basic temporal expressions by themselves are not very powerful. Truly powerful and complex recurring events can be created by combining basic expressions in expression collections.

### .13.1.3.1 Union Expression

```
Union:
  Expression(parameter1, parameter2, ...)
  Expression(parameter1, parameter2, ...)
  ...
```

### .13.1.3.2 Intersection Expression

```
Intersection:
  Expression(parameter1, parameter2, ...)
  Expression(parameter1, parameter2, ...)
  ...
```

### .13.1.3.3 Difference Expression

```
Difference:
  Include:
    Expression(parameter1, parameter2, ...)
  Exclude:
    Expression(parameter1, parameter2, ...)
```

#### .13.1.3.3.1 Expression Collection Examples

An event that occurs at 8:00 AM:

```
Intersection:
  MinuteRange(0, 0)
  HourRange(8, 8)
```

An event that occurs Monday, Tuesday, Wednesday, and Saturday:

```
Union:
  DayOfWeekRange(Monday, Wednesday)
  DayOfWeekRange(Saturday, Saturday)
```

An event that occurs Monday, Tuesday, Wednesday, and Saturday at 8:00 AM:

```
Intersection:
  MinuteRange(0, 0)
  HourRange(8, 8)
  Union:
    DayOfWeekRange(Monday, Wednesday)
    DayOfWeekRange(Saturday, Saturday)
```

An event that occurs Monday, Tuesday, Wednesday, and Saturday at 8:00 AM *except* the last Saturday of the month:

```
Difference:
  Include:
    Intersection:
      MinuteRange(0, 0)
      HourRange(8, 8)
      Union:
        DayOfWeekRange(Monday, Wednesday)
        DayOfWeekRange(Saturday, Saturday)
  Exclude:
    DayInMonth(Saturday, -1)
```

## .13.1.4 The Substitution Expression

The Substitution temporal expression works a lot like a Difference expression, except it provides a substitute for the exclusion.

The Substitution expression is not available in Release 9.04.

```
Substitution:
  Include:
    Expression(parameter1, parameter2, ...)
  Exclude:
    Expression(parameter1, parameter2, ...)
  Substitute:
    Expression(parameter1, parameter2, ...)
```

### Substitution Examples

An event that occurs on the first Monday of the month, *except* on Labor Day (first Monday in September) - where it is rescheduled for the following Tuesday:

```
Substitution:
  Include:
    DayInMonth(Monday, 1)
  Exclude:
    Intersection:
      DayInMonth(Monday, 1)
      MonthRange(9, 9)
  Substitute:
    DayOfWeekRange(Tuesday, Tuesday)
```

An event that occurs Monday, Tuesday, Wednesday, and Saturday at 8:00 AM *except* the last Saturday of the month - where it is rescheduled for the following Sunday at 1:00 PM:

```
Substitution:
  Include:
    Intersection:
      MinuteRange(0, 0)
```

```
    HourRange(8, 8)
    Union:
      DayOfWeekRange(Monday, Wednesday)
      DayOfWeekRange(Saturday, Saturday)
Exclude:
  DayInMonth(Saturday, -1)
Substitute:
  Intersection:
    MinuteRange(0, 0)
    HourRange(13, 13)
    DayOfWeekRange(Sunday, Sunday)
```

### .13.1.5 What's Next?

If you would like to take the Temporal Expression tutorial, go here.
If you would like to see the Temporal Expression demo data, go here.
If you would like to see the Temporal Expression Java API, go here.

## .13.2 Temporal Expressions Tutorial

This tutorial is intended to be used with the current trunk version of Apache Open For Business.

Log into your local copy of OFBiz as admin. To create or modify temporal expressions, you will need to go to Web Tools -> Configuration -> Temporal Expression. To create calendar events based on temporal expressions, you will need to go to Work Effort -> Work Effort -> Create Work Effort. You should locate these screens and familiarize yourself with these applications before starting the tutorial.

### Create A Frequency Expression

Let's say you want to keep track of your pay days - which occur every two weeks on Friday. To do that you will need a Frequency temporal expression.

In the Find Temporal Expression screen, click Create. In the Temporal Expression Maintenance screen, find the Frequency section. Type PAYDAY in the Expression ID field. Click the Calendar icon next to the From field to bring up a popup calendar. Select January 8, 2010 08:00. Click OK. Select Day Frequency Type and select 14 in the Frequency Count field. Click the Save button.

In the Create Work Effort screen, type "Pay Day" in the Name field. Select Event for the Type, select Confirmed for the Status, select General for the Scope, and use the Calendar icon to set Estimated Start Date to January 1, 2010. Scroll down the screen to find the Temporal Expression field. Select PAYDAY. Click Save. The Pay Day calendar event has been created. To view it, click the Calendar tab, then select Month View. You will see the pay day appear every two weeks on Friday.

## Create A Day Of Month Event

Now that you have your pay days appearing on your calendar, you decide you would also like to see the days your car payment is due - which is the 15th of the month. There is no need to create a temporal expression for that - the OFBiz temporal expression demo data includes every day of the month.

In the Create Work Effort screen, type "Car Payment" in the Name field. Select Event for the Type, select Confirmed for the Status, select General for the Scope, and use the Calendar icon to set Estimated Start Date to January 1, 2010. Scroll down the screen to find the Temporal Expression field. Select DAYOFMONTH_15. Click Save. The Car Payment calendar event has been created. To view it, click the Calendar tab, then select Month View. You will see the car payment due date appear every 15th of the month.

## Create A Complicated Recurring Event

You like to play soccer. You like to play soccer **so much** you practice four days a week - Monday, Tuesday, Wednesday, and Saturday. The Monday through Wednesday practices are at 6 PM, and the Saturday practice is at 10 AM. On the last Saturday of the month a lacrosse team uses the field you practice on, so your teammates agreed to reschedule that practice to 1 PM Sunday. [Having a soccer team surrender a field to a lacrosse team is a supreme act of charity - one that your team is immensely proud of.] There is one other exception to the schedule your teammates agreed on: If a practice falls on Saint Patrick's Day, the practice is canceled (since it is very unlikely anyone would show up).

Now, you have no problem remembering your soccer practice schedule. The problem is, no one else can remember it - so you decide to add it to your calendar. If anyone wants to know when you are at soccer practice, all they have to do is check your calendar.

It would be best to start off by writing out the schedule using the temporal expression notation:

```
Difference:
  Include:
    Union:
      Intersection:
        MinuteRange(0, 0)
```

```
        HourRange(18, 18)
        DayOfWeekRange(Monday, Wednesday)
      Substitution:
        Include:
          Intersection:
            MinuteRange(0, 0)
            HourRange(10, 10)
            DayOfWeekRange(Saturday, Saturday)
        Exclude:
          DayInMonth(Saturday, -1)
        Substitute:
          Intersection:
            MinuteRange(0, 0)
            HourRange(13, 13)
            DayOfWeekRange(Sunday, Sunday)
  Exclude:
    Intersection:
      DayOfMonthRange(17, 17)
      MonthRange(3, 3)
```

Complicated temporal expressions like this need to be built from the inside out. So, to start off you will create the Monday through Wednesday intersection, the Saturday intersection, the Sunday intersection, and the Saint Patrick's Day intersection. Finally, you will assemble the intersections into the Union, Substitution, and Difference collections.

In the Find Temporal Expression screen, click Create. In the Temporal Expression Maintenance screen, find the Day Of Week Range section. Type MON_THRU_WED in the Expression ID field. Select Monday for the From field and select Wednesday for the To field. Click the Save button. Go back to the Find Temporal Expression screen, and click Create. In the Temporal Expression Maintenance screen, find the Intersection section. Type MON_THRU_WED_6PM in the Expression ID field and click the Save button. Now you can add member expressions to the intersection. Select MINUTE_00 in the Include field and click Save. Select HOUR_18 in the Include field and click Save. Select MON_THRU_WED in the Include field and click Save. Your Monday through Wednesday at 6PM intersection is finished.

In the Find Temporal Expression screen, click Create. In the Temporal Expression Maintenance screen, find the Intersection section. Type SAT_10AM in the Expression ID field and click the Save button. Now you can add member expressions to the intersection. Select

MINUTE_00 in the Include field and click Save. Select HOUR_10 in the Include field and click Save. Select DAYOFWEEK_07 in the Include field and click Save. Your Saturday at 10AM intersection is finished.

In the Find Temporal Expression screen, click Create. In the Temporal Expression Maintenance screen, find the Intersection section. Type SUN_1PM in the Expression ID field and click the Save button. Now you can add member expressions to the intersection. Select MINUTE_00 in the Include field and click Save. Select HOUR_13 in the Include field and click Save. Select DAYOFWEEK_01 in the Include field and click Save. Your Sunday at 1PM intersection is finished.

In the Find Temporal Expression screen, click Create. In the Temporal Expression Maintenance screen, find the Intersection section. Type MARCH_17 in the Expression ID field and click the Save button. Now you can add member expressions to the intersection. Select DAYOFMONTH_17 in the Include field and click Save. Select MONTH_RANGE_03 in the Include field and click Save. Your March 17th intersection is finished.

In the Find Temporal Expression screen, click Create. In the Temporal Expression Maintenance screen, find the Day In Month section. Type LAST_SATURDAY in the Expression ID field. Select -1 for the Occurrence field and Saturday for the Day field. Click Save. Your last Saturday of the month expression is finished.

In the Find Temporal Expression screen, click Create. In the Temporal Expression Maintenance screen, find the Substitution section. Type SOCCER_SUBST in the Expression ID field and click the Save button. Now you can add member expressions to the substitution. Select SAT_10AM in the Include field and click Save. Select LAST_SATURDAY in the Exclude field and click Save. Select SUN_1PM in the Substitution field and click Save. Your soccer practice Saturday substitution is finished.

In the Find Temporal Expression screen, click Create. In the Temporal Expression Maintenance screen, find the Union section. Type SOCCER_UNION in the Expression ID field and click the Save button. Now you can add member expressions to the union. Select MON_THRU_WED_6PM in the Include field and click Save. Select SOCCER_SUBST in the Include field and click Save. Your Monday, Tuesday, Wednesday, and Saturday union is finished.

In the Find Temporal Expression screen, click Create. In the Temporal Expression Maintenance screen, find the Difference section. Type SOCCER_PRACTICE in the Expression ID field and click the Save button. Now you can add member expressions to the difference. Select SOCCER_UNION in the Include field and click Save. Select MARCH_17 in the Exclude field and click Save. Your soccer practice temporal expression is finished.

In the Create Work Effort screen, type "Soccer Practice" in the Name field. Select Event for the Type, select Confirmed for the Status, select General for the Scope, and use the Calendar icon to set Estimated Start Date to January 1, 2010. Scroll down the screen to find the Temporal Expression field. Select SOCCER_PRACTICE. Click Save. The Soccer Practice calendar event has been created. To view it, click the Calendar tab, then select Month View. You will see the soccer schedule. Notice how the last Saturday of the month has been rescheduled. Scroll through the months to get to March 2010. Notice how practice has been canceled on March 17th.

# Chapter 18: Customization

## Creating Practice Application (Hello World...)

**Written by: Pranay Pandey with feedback and contributions from Chirag Manocha, Ravindra Mandre, Rob Schapper**

**Special thanks to Anil Patel and Mridul Pathak for inspiring me to write this tutorial.**

This tutorial document is meant for OFBiz beginners. It will help learn fundamentals of OFBiz application development process. Aim behind the creation of this tutorial is to acquaint a developer with best practices, coding conventions and the control flow and many more. This practice acts as the "Helloworld" for OFBiz similar as the first Helloworld when the programming "C" language was introduced by Kernighan and Richie.

**Important!**

This tutorial is intended to be used with the latest SVN revision. It will *not* work with Release 4.

You can watch OFBiz videos, which are available at Framework Introduction Videos, in parallel with the development of this application.

## Part - 1

**Note - 1** :- For any additional queries and concerns you can refer Example component. You will always find the code in example component to be the latest code of OFBiz. Take reference whenever you want to see some sample code for the development of this application, this will help you in future developments as well.

Every new feature is first added in the Example component for the references.

**Note - 2** : Before starting the development of this application you must read the contents from:

OFBiz Contributors Best Practices , Coding Conventions and Best Practices Guide

**Note - 3** : Don't copy any file from other component, as the revision number for the file is also copied. Always create a new file and, if required, then copy the contents of the file." Also be conscious about the unused code as well.

**Note - 4** : For searching any of the document the best place is at : OFBiz Documentation Index.

**Note - 5** : Right from the beginning, reading the console log must be a habit to make troubleshooting easy and understanding the system well.

**Note - 6** : You can find the source code of this application attached with this document that you are going to develop but it is preferred to just take reference from it 😉

## Create first basic application by name "practice" :

**Step - 1 :** Create the sub-directory (folder) in hot-deploy/ and name it "practice"(hot-deploy/practice). The directory name should match the new components name that we are creating.
Note : Remember that all customized development is done at this place only.
**Step - 2 :** Create the ofbiz-component.xml file on path hot-deploy/practice and place the following content in it (for reference you can check this file in any other component of OFBiz):

```
<?xml version="1.0" encoding="UTF-8"?>

<ofbiz-component name="practice"

       xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"

       xsi:noNamespaceSchemaLocation="http://ofbiz.apache.org/dtds/ofbiz-component.xsd">

      <resource-loader        name="main" type="component"/>

    <webapp name="practice"

       title="Practice"

       server="default-server"

       base-permission="OFBTOOLS"

       location="webapp/practice"

       mount-point="/practice"

       app-bar-display="false"/>

</ofbiz-component>
```

## ofbiz-component.xml explained:

1. The **ofbiz-component.xml** file is responsible for letting OFBiz know where resources are at as well as allowing you to add to the classpath.
2. The 'resource-loader name' can be any string. Here we are setting it as "main". The 'type' tells OFBiz that we will be loading a component.

```
<resource-loader name="main" type="component"/>
```

3. In **<webapp>** tag, we have different attributes and their purpose is as follows:

```
<webapp name="practice"

       title="Practice"

       server="default-server"
```

```
base-permission="OFBTOOLS"
location="webapp/practice"
mount-point="/practice"
app-bar-display="false"/>
```

a) name :- defines the name of our web application.
b) title :- This will be the title of the application which will be shown in the top navigation.
c) server :- This will let OFBiz know what server to use
d) base-permission :- This line requires that the user should have the OFBTOOLS permission to be able to use the application. Since the 'admin' user has this permission we do not have to create any new users.
e) location :- This will be the location that is the default base directory for the server
f) mount-point :- This is the URL used to access this resource. in this case it would be localhost:8080/practice
g) app-bar-display :- This will let OFBiz know if we want our component to show up in the main application tabs that are part of the common ofbiz decorator.

## Creating the web app:

**Step - 1 :** Create a "webapp" directory in the practice component (hot-deploy/practice/webapp). This directory contains all the webapp related files for the component we are creating.
**Step - 2 :** Create a sub-directory inside the webapp directory by the name of "practice" which is the name of the webapp which you are going to develop (hot-deploy/practice/webapp/practice). A component can have multiple webapps attached to it. e.g. In the **"marketing"** component there are two webapps **"marketing"** and **"sfa"**.
The webapp we are creating will follow the J2EE webapp standards.
**Step - 3 :** Create WEB-INF directory in your webapp (hot-deploy/practice/webapp/practice/WEB-INF).
An OFBiz web application requires two configuration files, a **controller.xml** and a **web.xml**. The controller.xml tells OFBiz what to do with various requests from visitors: what actions to take and what pages to render. web.xml tells OFBiz what resources (database and business logic access) are available for this web application and how to handle web-related issues, such as welcome pages, redirects, and error pages.
**Step - 4** Create a file named "web.xml"(web.xml follows j2ee webapp specs). Contents of this file can be copied from any of the existing component e.g. /framework/example component. The Important values to change are the <display-name>, the **localDispatcherName**, the **mainDecoratorLocation** and the webSiteId.

```
<context-param>
    <param-name>webSiteId</param-name>
    <param-value>PRACTICE</param-value>
```

```
    <description>A unique ID used to look up the WebSite entity to get information about catalogs, etc.</description>

</context-param>

<context-param>

     <param-name>localDispatcherName</param-name>

     <param-value>practice</param-value>

     <description>A unique name used to identify/recognize the local dispatcher for the Service Engine</description>

</context-param>

<context-param>

     <param-name>mainDecoratorLocation</param-name>

     <param-value>component://practice/widget/CommonScreens.xml</param-value>

     <description>The location of the main-decorator screen to use for this webapp; referred to as a context variable in screen def XML files.</description>

</context-param>
```

- For now just put websiteId as "PRACTICE", you will explanation after some time in this tutorial only.

- For now put the value: "component://practice/widget/CommonScreens.xml" in for the mainDecoratorLocation and you will see why in a while. This location is used in pointing to the main decorator location in screens like
- ${parameters.mainDecoratorLocation}
  Which increases the code Independence from changing the path at many places when we need to change the main decorator location. At that time we just need to change the location there only and it will work for all the screens where it has been used. One more advantage of doing this in screens is the purpose of resuability of existing screens which we can use from other components, but it decorate that screen by your decorator only as the same pattern is used at all the places and in all the components to show the mainDecoratorLocation. Concentrate on this when you add decorators in your screens in not too distant future with the development of this application.
  **Step - 5** Create a file named "controller.xml" (used by ofbiz webapp controller) This file will be small and simple at first but will grow as we add functionality later on. For now insert the following code:

```
<?xml version="1.0" encoding="UTF-8"?>

<site-conf xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"

       xsi:noNamespaceSchemaLocation="http://ofbiz.apache.org/dtds/site-conf.xsd">

       <include
location="component://common/webcommon/WEB-INF/common-controller.xml"/>
```

```
        <description>Practice Component Site Configuration File</description>

        <owner>Copyright 2001-2009 The Apache Software Foundation</owner>
<handler name=″screen″ type=″view″
class=″org.ofbiz.widget.screen.ScreenWidgetViewHandler″/>        <!-- Request
Mappings -->

        <request-map uri=″main″>

            <security https=″false″ auth=″false″/>

            <response name=″success″ type=″view″ value=″main″/>

        </request-map>

        <!-- end of request mappings -->

        <!-- View Mappings -->

        <view-map name=″main″ type=″screen″
page=″component://practice/widget/PracticeScreens.xml#main″/>

        <!-- end of view mappings -->

</site-conf>
```

**Step - 6 :** Move up one level and create a new directory named 'error'(hot-deploy/practice/webapp/practice/error).
**Step - 6.a :** Create a file error.jsp inside the ″error″ directory. Contents of this file can be taken from any of the existing component e.g. example component.
The location of your error page will be specified in the beginning of your controller.xml file like <errorpage>/error/error.jsp</errorpage> . You will need to make or copy over a /webapp/practice/error/error.jsp page to show an error message to the user.
**Step - 7 :** Create a sub-directory inside your component directory ″practice″ named ″widget″(hot-deploy/practice/widget). This directory will contain your forms, menus, and screens which will be created for UI.
**Step - 8 :** Create a file inside the directory ″widget″ named ″PracticeScreens.xml″. Contents of this file can be taken from any existing component e.g. example component.
As now onwards you will be able to create screens views so an important reading at this place will be Best Practices Guide . On this page there links to following:

- HTML and CSS Best Practices
- Managing Your Source Differences
- Methodology Recommendations
- User Interface Layout Best Practices

  All these readings will be really of help.
  Very first screen will be like :
- <?xml version=″1.0″ encoding=″UTF-8″?>
- <screens xmlns:xsi=″http://www.w3.org/2001/XMLSchema-instance″

- xsi:noNamespaceSchemaLocation="http://ofbiz.apache.org/dtds/widget-screen.xsd">
- <screen name="main">
- <section>
- <widgets>
- <label text="This is first practice"/>
- </widgets>
- </section>
- </screen>
- </screens>

**Step - 9 :** Now that we have the basic elements in place let's review the basic flow no matter how large or complex your component gets. First, a request will be made by a browser to see a specific resource. Take for example the request: *"localhost:8080/practice/control/main"*

1. When OFBiz sees this request it will look at the /practice section first. This is because in our ofbiz-component.xml file we said our webapps mount point would be /practice. Now OFBiz knows that our practice component will handle the rest of the request.
2. OFBiz will then look at our controller.xml file. Inside our controller.xml file we have request-maps and view-maps. If it finds a request-map with the name 'main' it will use the associated view-map, as follows. The request-map can either specify a view, or as we will see later an event or a service. If it specifies a view it will look further down in the controller.xml file and see if there is a view-map with the name specified by the value tag in the request-map.
3. For now we will keep it simple and assume that all the views go to a type=screen. If this is the case then the page tag will specify a path to a screen definition file as well as a screen name to display after the "#" sign.

**Step - 10 :** Now its the time to run you first practice application!
Start the server by typing the following at the command line : **java -Xmx256M -jar ofbiz.jar** (the -Xmx256M command just ensures that the program has enough memory) Then, hit the url http://localhost:8080/practice/control/main in your browser. Your browser should show "This is first practice" as seen below.

**Output Screen :**


**Step - 11 :** Create a file in the webapp directory "practice" named index.jsp (Contents of this file can be taken from the "example" component). This file is responsible for redirecting the response to control/main if you give a url such as http://localhost:8080/practice/. If you give a url such as http://localhost:8080/practice/unknown/requestit will be redirected to the redirectPath specified in web.xml. In that case, ContextFilter will filter out the request and use the redirect path to redirect the request.

# Part - 2

## Doing some advancements :

**Step - 1 :** Now it is time to create a decorator for the screens in this application. Create a file named CommonScreens.xml in the "widget" directory. This file will contain the common screens which will be used throughout the entire application. A common screen may have a header and footer included so any other screens that use it as a decorator will also have those items. For this you can take reference from the CommonScreens.xml file in the "example" component. CommonScreens.xml file code will be:

```
<screen name="CommonPracticeDecorator">
    <section>
        <widgets>
            <decorator-section-include name="body"/>
        </widgets>
    </section>
</screen>
```

Refer to the "CommonScreens.xml" file in the "Example" component to see usage of main-decorator. Two important readings at this moment are Understanding the OFBiz Widget Toolkit and "The Decorator" section in FAQ.

**Step - 2 :** Create a menu for this application. For this create a file by name PracticeMenus.xml in "widget" directory of you component. For this take a reference from ExampleMenus.xml file of "example" component.

```
<?xml version="1.0" encoding="UTF-8"?>
<menus xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
xsi:noNamespaceSchemaLocation="http://ofbiz.apache.org/dtds/widget-menu.xsd">
    <menu name="MainAppBar" title="PracticeApplication" extends="CommonAppBarMenu"
extends-resource="component://common/widget/CommonMenus.xml">
        <menu-item name="main" title="Main"><link target="main"/></menu-item>
    </menu>
</menus>
```

Include this menus file in your CommonPracticeDecorator as follows:

```
<screen name="CommonPracticeDecorator">

        <section>

            <widgets>

                <include-menu location="component://practice/widget/PracticeMenus.xml"
name="PracticeAppBar"/>

                <decorator-section-include name="body"/>

            </widgets>

        </section>

    </screen>
```

**Step - 3:** Create the sub-directory "actions" inside the WEB-INF directory.
In this directory we will create the scripting files. Scripting files are used to prepare data on fly. These files will be groovy files. Earlier we were using bsh(beanshell) files. This is a script which is used to fetch the data from database on the fly for the UI.
Reference : Tips & Tricks while working with Groovy & http://groovy.codehaus.org/. While working in groovy always be conscious about the imported classes and packages. Import only those which have been used in your file. For putting log messages use methods from "Debug" class just do this practice from the beginning itself. So create a file by name Person.groovy in this actions directory which will be fetching all the records from the entity "Person". At this moment this is really going to be the small code for doing this (a single line) like

```
context.persons = delegator.findList("Person", null, null, null, null, false);
```

The above statement will fetch all the records from the Person entity and will put them in context by the name persons. Now this list by the name person will be iterated in the ftl file to show the records.
At this place an important reading is available at : Which variables are available in screen context?
**Step - 4 :** Now in webapp "practice" create one ftl file by name "Person.ftl" which will be used to show the data fetched by groovy file.
Reference : http://freemarker.sourceforge.net/docs/
At this moment you need only to iterate the list of persons which is there in the context. The only code that is needed to that is:

```
<#if persons?has_content>

  <h2>Some of the people who visited our site are:</h2>

  <br>

  <ul>

    <#list persons as person>

      <li>${person.firstName?if_exists} ${person.lastName?if_exists}<li>
```

```
    </#list>
  </ul>
</#if>
```

**Step - 5 :** Now create a new screen by name "person" in PracticeScreens.xml file and also create a new menu item in PracticeMenus.xml file.
PracticeScreens.xml new screen entry will be:

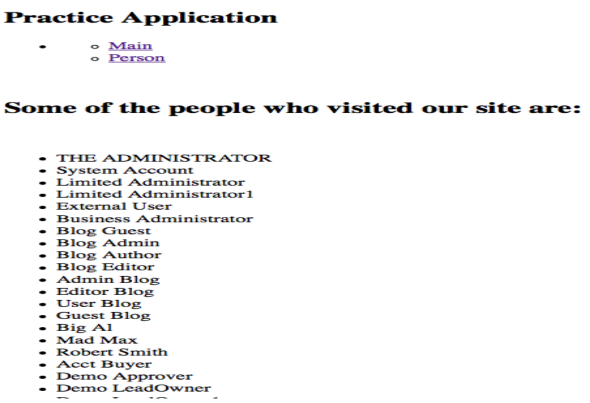
```
    <screen name="person">
        <section>
            <actions>
                <script
location="component://practice/webapp/practice/WEB-INF/actions/Person.groovy"/>
            </actions>
            <widgets>
                <decorator-screen name="CommonPracticeDecorator"
location="${parameters.mainDecoratorLocation}">
                    <decorator-section name="body">
                        <platform-specific>
                            <html>
                                <html-template
location="component://practice/webapp/practice/Person.ftl"/>
                            </html>
                        </platform-specific>
                    </decorator-section>
                </decorator-screen>
            </widgets>
        </section>
    </screen>
```

**Step - 6 :** Now change the controller.xml file so it points to the new screen, as we did earlier. Now again run the application and observe the results by giving http://localhost:8080/practice/control/person .

**Hint**

If the output screen does not contain the menu as shown below, you will most likely need to change auth="true" to auth="false" in your controller.xml for the menu to come up.

**Output Screen :**




## Now moving to create a form for showing the content of Person entity on the screen:(Using Form Widget)

**Step - 1 :** Now add one more menu item to by name "PersonForm" to your PracticeMenus.xml file.
**Step - 2:** Create one file in widget by name PracticeForms.xml and create a list form for showing the records from person entity.
(Take reference from ExampleScreens.xml and ExampleForms.xml files).

```
 <form name="ListPersons" type="list" list-name="persons" list-entry-name="person"
target="updatePracticePerson" paginate-target="personForm">
        <auto-fields-service service-name="updatePracticePerson"
default-field-type="display" map-name="person"/>
</form>
```

**Step - 3 :** Create new screen by name personForm and include this list form in it.

```
<screen name="PersonForm">
        <section>
            <actions>
                <set field="headerItem" value="personForm"/>
                <set field="titleProperty" value="PageTitlePracticePersonForm"/>
                <entity-condition entity-name="Person" list="persons"/>
            </actions>
            <widgets>
                <decorator-screen name="CommonPracticeDecorator"
location="${parameters.mainDecoratorLocation}">
```

```
                    <decorator-section name="body">
                        <label text="Person List" style="h2"/>
                        <include-form name="ListPersons"
location="component://practice/widget/PracticeForms.xml"></include-form>
                    </decorator-section>
                </decorator-screen>
            </widgets>
        </section>
</screen>
```

**Step - 4 :** Do the needful for showing this screen in controller.xml.
Now run the application again and observe the difference.
Till Now you have worked on controller requests mappings, Screen widget, form widget, Decorator, Menus, groovy, ftl.

## Create main Decorator for decorating this application:

**Step - 1 :** Create screen by name "main-decorator" in CommonScreens.xml file.(Take reference from CommonScreens.xml file of Example component.)

```
<screen name="main-decorator">
        <section>
            <actions>
                <property-map resource="CommonUiLabels" map-name="uiLabelMap"
global="true"/>
                <property-map resource="PracticeUiLabels" map-name="uiLabelMap"
global="true"/>
                <set field="layoutSettings.companyName"
from-field="uiLabelMap.PracticeCompanyName" global="true"/>
                <set field="activeApp" value="practice" global="true"/>
                <set field="applicationMenuName" value="PracticeAppBar" global="true"/>
                <set field="applicationMenuLocation"
value="component://practice/widget/PracticeMenus.xml" global="true"/>
            </actions>
            <widgets>
```

```
                <include-screen name="GlobalDecorator"
location="component://common/widget/CommonScreens.xml"/>

            </widgets>

        </section>

</screen>
```

**Step - 2 :** Now include this decorator in CommonPracticeDecorator screen which you are already having.
Now run it again and see the difference.

## Now its the time to show practice application in the app bar :

**Step - 1 :** For this just make app-bar-display="true" in ofbiz-component.xml file.
Restart the server then run it again you will find practice application in app bar.

## Create UI Labels:

*Step - 1 :*For this create directory by name "config" in your component directory i.e. "practice".
**Note: -**Here remember to create an entry for the config directory in your ofbiz-component.xml file.
which will be :

```
<classpath type="dir" location="config"/>
```

That means you have to place the config directory on the classpath to access configuration files.
**Step - 2:** Now create a file by name PracticeUiLabels.xml and create some of the ui labels for practice applicaton. (take reference from ExampleUiLabels.xml). Here remember one thing whenever you make a change in UiLabels then you have to restart the server for having the changes in effect. At first create only 2 ui labels like

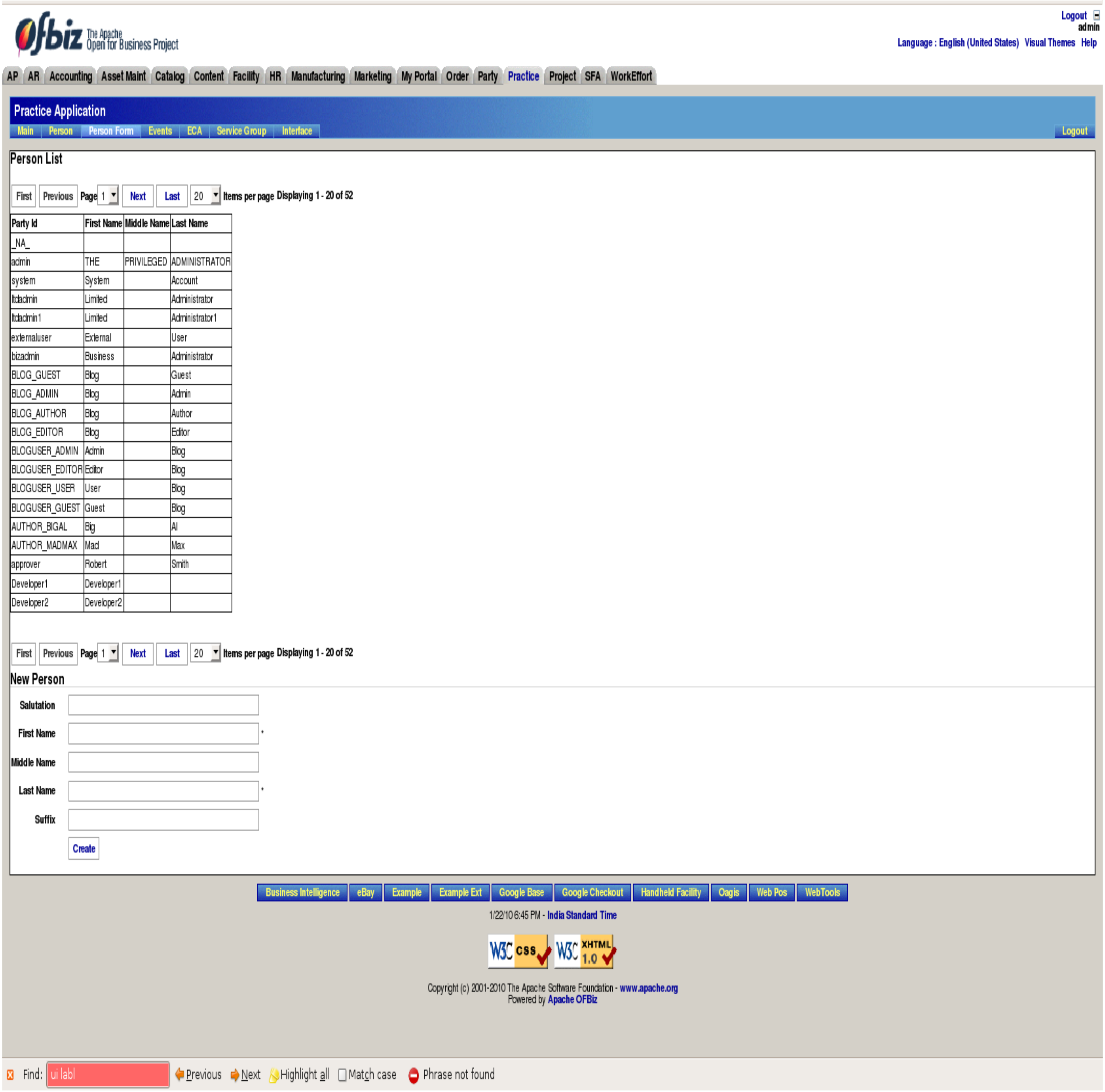
```
<property key="PracticeApplication">

    <value xml:lang="en">This is first        practice</value>

</property>

<property key="PracticeCompanyName">

    <value xml:lang="en">OFBiz: Practice</value>

</property>
```

**Step - 3:** Include this UI Label resource in your main decorator screen which you created earlier and use these one or two ui labels which you are having now. **Step – 4 :** Use those 2 UI labels at appropriate places.

**Note :** Always search first for any existing Ui label in ofbiz and if you don't find it there then only create new one.

Now run the application and see the output screen as bellow from :

**Output Screen:**



## Now its time to make this practice application secure by checking authentication (user login):

**Step - 1 :** Take reference from **ExampleMenus.xml** file for having login and logout options in your menu.
Targets for these options will be available from "component://common/webcommon/WEB-INF/common-controller.xml", which we have to include in our controller.xml.
or you can do these entries in your controller.xml file under

```
<!- Request Mappings ->

<!-- Security Mappings -->

 <request-map uri="checkLogin" edit="false">

    <description>Verify a user is logged in.</description>

        <security https="true" auth="false"/>

        <event type="java" path="org.ofbiz.webapp.control.LoginWorker" invoke="checkLogin"
/>

        <response name="success" type="view" value="main"/>

        <response name="error" type="view" value="login"/>

    </request-map>

    <request-map uri="login">

        <security https="true" auth="false"/>

        <event type="java" path="org.ofbiz.webapp.control.LoginWorker" invoke="login"/>

        <response name="success" type="view" value="main"/>

        <response name="error" type="view" value="login"/>

    </request-map>

    <request-map uri="logout">

        <security https="true" auth="true"/>

        <event type="java" path="org.ofbiz.webapp.control.LoginWorker" invoke="logout"/>

        <response name="success" type="request" value="checkLogin"/>

        <response name="error" type="view" value="main"/>

    </request-map>
```

These requests are needed to add in your controller only when you have not included any of the other component controller which consist of these requests. So if you have already included common-controller.xml file then you don't need to explicitly do these entries in your controller.
and the same view we have in place can be used for which we have entry in common-controller.xml file we can also have our own:

```
<view-map name="login" type="screen"
page="component://common/widget/CommonScreens.xml#login"/>
```

**Step - 2 :** Make changes in requests in controller.xml file make auth="true" means now these requests needs authentication.
This is first security level which you have implemented. you request should look like :

```
<request-map uri="main">

    <security https="true" auth="true"/>

    <response name="success" type="view" value="main"/>

    <response name="error" type="view" value="main"/>

</request-map>
```

Now run your application and observe the difference. you can login by user name : admin and pwd: ofbizHere we should understand why we had given the permission "OFBTOOLS" in base-permission in ofbiz-component.xml file. To understand this please read following carefully and perform steps as mentioned:
Confirm that user 'admin' has the 'OFBTOOLS' permission.
**Step : 1 –** Login into partymanager to confirm that the user admin has the required permission https://127.0.0.1:8443/partymgr/control/main
**Step : 2 –** Once your logged in search for the user by typing 'admin' in the User Login field and then clicking the Lookup Party button.
**Step : 3 –** This does a wild char* search and you should see multiple users returned. Click the 'Details' button for the admin user.
**Note :** Important point to note here is that the person 'Mr. THE PRIVILEGED ADMINISTRATOR' has a partyid admin has multiple logins as listed in the
User Name(s) form.
**Step : 4 –** We interested in the admin user login so click on the 'Security Groups' button and confirm that the use 'admin' is part of the 'FULLADMIN' group. The Groups that the user belongs to is shown in the bottom list form Drill down on the FULLADMIN.
**Step : 5 –** Click on the Permissions tab. This tab shows all the permissions for the FULLADMIN security group. Navigate between the permissions till you find the OFBTOOLS permissions. 'OFBTOOLS_VIEW Permission to access the Stock OFBiz Manager Applications.' This confirms that the userlogin 'admin' has the permission 'OFBTOOLS'
**Step : 6 –** Take a moment to review the entity model as it relates to users and permissions. The arrow represents the many side of the relationship. An really important reading at this moment is at : OFBiz Security

## Part - 3

### Writing CRUD operations:

Create, Update and Delete operations for an entity will be done by services which we will be writing in minilang.
At first approach we will write our own services for performing these operations for making a better understanding with it.
Onwards we will be doing this by calling already implemented services.
For doing so we will take the entities from Party model which are:
--Party
--Person
A person is a party so for the creation of a person first a party needs to be created with partyTypeId="PERSON".
So there can be two ways to do that:
1. Create service for the creation of a party with type Person.
2. Create a party first in the service which will be creating person.

### For writing services following steps must be performed:

**Step - 1:** Create directory by name "servicedef" in component directory "practice". This directory will contain all the service definition files e.g. services.xml, secas.xml.
**Note :** If it is a service which is written in Java then it will be placed in "src" directory and if it is a service which is written in minilang then it will be placed in script directory. e.g. for java applications/party/src/org/ofbiz/party/party/PartyServices.java and for minilang applications/party/script/org/ofbiz/party/party/PartyInvitationServices.xml.
Respective class path and file path will be mentioned in the service definition.
*Step - 2 :*In controller you have to create an entry for the request for the execution of a service and set the response like

```
<request-map uri="createPracticePerson">
    <security https="true" auth="true"/>
    <event type="service" invoke="createPracticePerson"/>
    <response name="success" type="view" value="PersonForm"/>
</request-map>
```

**Step - 3:** Now all the services which you have written needs to be loaded when server starts so you need to do an entry for service definition in ofbiz-component.xml file which will be like

```
<service-resource type="model" loader="main" location="servicedef/services.xml"/>
```

So whenever you make any change in any service definition then you must restart the server to have changes in effect.

## Writing CRUD operations for Party entity:

First we will be writing services for Party then while writing services for creating Person we will be calling the service for party.
**Step - 1** :Create a file by name "services.xml" in servicedef directory.
**Step - 2 :** Define services for CRUD operations for Party entity. Name of services will be createPracticeParty, updatePracticeParty, deletePracticeParty and specify the correct location to the file where these services will be implemented like /framework/example/script/org/ofbiz/example/example/ExampleServices.xml.
**Step - 3 :** Create directory structure and PracticeServices.xml file in your component directory for giving the implementation of these services.
(For implementation take reference from services.xml and ExampleServices.xml files of Example component)
**Note :** Do not use the <override> tag as it is introduced later in the tutorial.
From this place if you want to run these services then you can run them by webtools--> Run Service . By this place you can test your services.
**Note:** At this place you must read http://www.nabble.com/The-fancy-new-entity-auto-service-execution-engine-td18674040.html.
This feature has been recently added against the traditional approach of writing CRUD operations for an entity.
This new feature enables you to just define the services by mentioning the operation you want to perform.Basically just set the engine attribute to "entity-auto" and the invoke attribute to "create", "update", or "delete".
like you can take a look in the following code from services.xml of example component:

```
<service name="createExample" default-entity-name="Example" engine="entity-auto"
invoke="create" auth="true">

    <description>Create a Example</description>

    <permission-service service-name="exampleGenericPermission" main-action="CREATE"/>

    <auto-attributes include="pk" mode="OUT" optional="false"/>

    <auto-attributes include="nonpk" mode="IN" optional="true"/>

    <override name="exampleTypeId" optional="false"/>

    <override name="statusId" optional="false"/>

    <override name="exampleName" optional="false"/>

</service>
```

engine="entity-auto" invoke="create" play the role for creating the records for the default-entity "Example."

Here for practice you may go by following further steps those steps will help you in understanding the concept then onwards you can practice the pattern given above in your code as its the best practice for these kind of simple operations in OFBiz.

## Writing CRUD operations for Person entity:

- Here for the creation of record for person entity we will need to have the partyId for that so we will first call the service createPracticeParty then after getting the partyId we will create the record for person.
- Here we will be adding one add form in the bottom of the list form which we have for the person entity. This form will be calling the services for creating a record for person.

**Step - 1 :** Create the add form for the creation of person and add this in the same screen for person form.

```
<form name="CreatePerson" type="single" target="createPracticePerson">
      <auto-fields-service service-name="createPracticePerson"/>
      <field name="submitButton" title="Create" widget-style="smallSubmit"><submit
button-type="button"/></field>
</form>
```

**Step - 2 :** Write CRUD operations for person entity.this is a code for createPracticePerson in services.xml

```
<service name="createPracticePerson" default-entity-name="Person" engine="simple"
          location="component://practice/script/org/hotwax/practice/PracticeServices.xml
" invoke="createPracticePerson" auth="true">
     <description>Create a Person</description>
     <auto-attributes include="pk" mode="OUT" optional="false"/>
     <attribute name="salutation" mode="IN" type="String" optional="true"/>
     <attribute name="firstName" mode="IN" type="String" optional="false"/>
     <attribute name="middleName" mode="IN" type="String" optional="true"/>
     <attribute name="lastName" mode="IN" type="String" optional="false"/>
     <attribute name="suffix" mode="IN" type="String" optional="true"/>
</service>
```

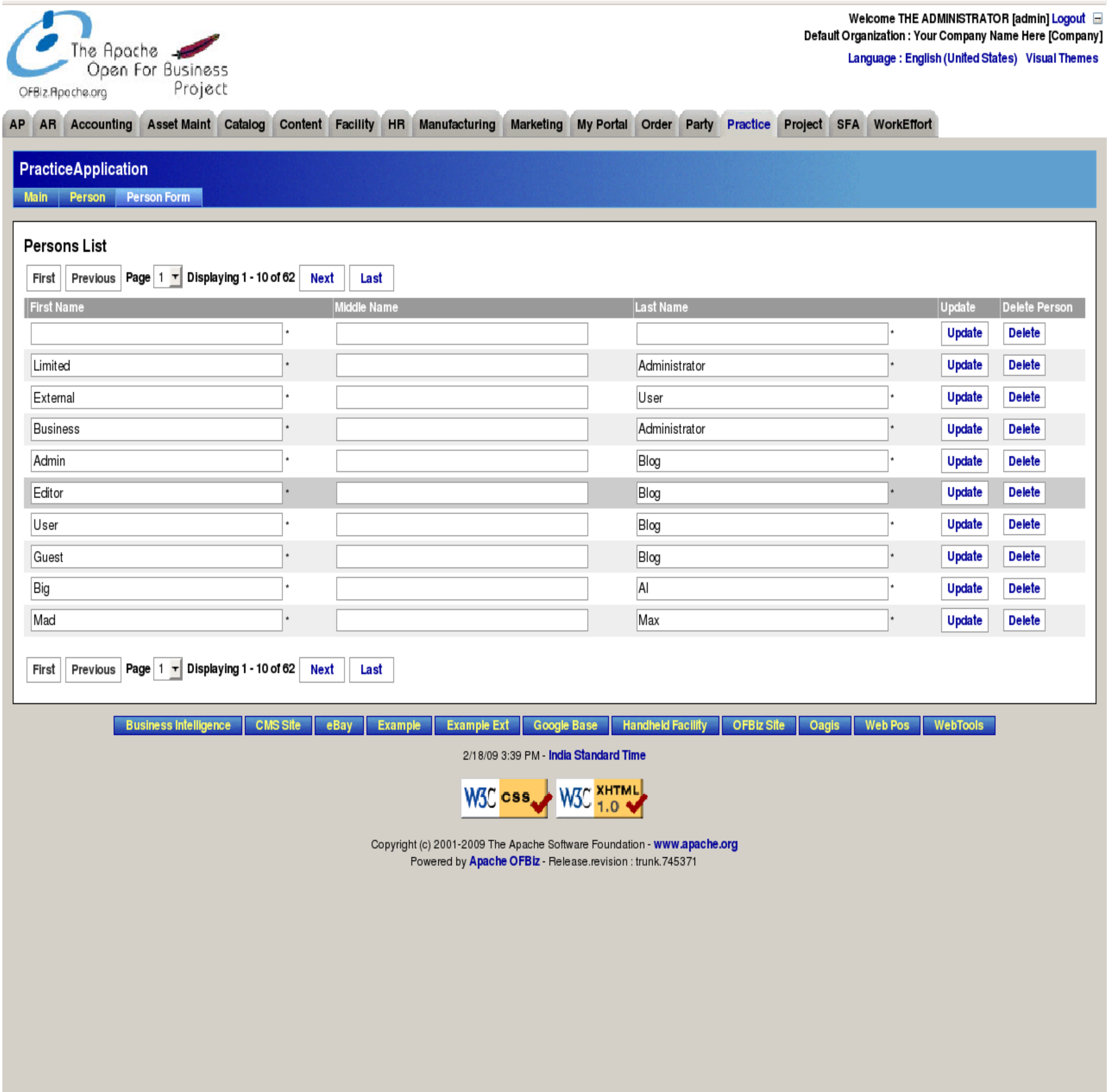
similar for Update and Delete

**Step - 3:** Now convert the List form with editable field(Ref. ListExampleItems from ExampleForms.xml) and add Update and delete option with it and also in the same screen there is add form also. As shown bellow

```
<form name="ListPersons" type="list" list-name="persons" list-entry-name="person"
target="updatePracticePerson" paginate-target="personForm">

        <auto-fields-service service-name="updatePracticePerson"
default-field-type="edit" map-name="person"/>

        <field name="partyId"><hidden/></field>

        <field name="submitButton" title="Update" widget-style="smallSubmit"><submit
button-type="button"/></field>

        <field name="deletePracticePerson" title="Delete Person"
widget-style="buttontext">

        <hyperlink target="deletePracticePerson?partyId=${person.partyId}"
description="Delete"/>

      </field>

</form>
```

**Step - 4 :** Create controller entries for these services which are going to be called by this form.
Now run the application and see the output screen as bellow:

Output Screen:




## Writing Events:

Events can be written in Java and minilang both. Now the next development which you are going to do will be writting these events.

Events are used for the validation and conversion using Simple Map Processor. The Simple Map Processor Mini-Language performs two primary tasks: validation and conversion. It does this in a context of moving values from one Map to another. The input map will commonly contain

Strings, but can contain other object types like Integer, Long, Float, Double, java.sql.Date, Time, and Timestamp.
Before moving any further an important link to go through is :
http://docs.ofbiz.org/display/OFBIZ/Mini-Language+Guide#Mini-LanguageGuide-smapFor making an understanding with it implementation will be done by performing following steps:
**Step - 1 :** For this create another tab in your practice application menu bar for this by Name "Events".
**Step - 2 :** Now create another menu with two menu item in PracticeMenus.xml file by name "EventMenu". This menu will be having 2 menu Item one will be by name "EventMinilang" and another by name "EventJava". One will be used to show the form which we will be calling an event which will be in minilang and other will be used to call java event.
**Step - 3 :** Simply show form on the request of both which will be for creating a new person. Both the forms will be different for calling different events as target in them.

```
<menu name="EventMenu" default-menu-item-name="eventMinilang"
default-selected-style="selected"

         type="simple" menu-container-style="button-bar button-style-1"
selected-menuitem-context-field-name="headerItem">

      <menu-item name="eventMinilang" title="Create Person --- Event MiniLang">

           <link target="createPracticePersonEventM"/>

      </menu-item>

      <menu-item name="eventJava" title="Create Person --- Event Java">

           <link target="createPracticePersonEventJ"/>

      </menu-item>

</menu>
```

**Step - 4 :** Show labels in screens above the form like "New Person - Simple Event" and "New Person - Java Event" so that it will be easy to identify the purpose of that form.
**Step - 5 :** Now set event in target of the forms and create request mappings in controller for the event.
Here important thing to note is in case of simple event controller entry will be like :

```
<request-map uri="createPracticePersonSimpleEvent">

    <security https="true" auth="true"/>{color}

    <event type="simple" path="org/hotwax/practice/PracticeEvents.xml"
invoke="createPracticePersonSimpleEvent"/>

    <response name="success" type="view" value="CreatePracPersonSimpleEvent"/>

    <response name="error" type="view" value="CreatePracPersonSimpleEvent"/>

</request-map>
```

Here the path is the path of the file where the event is written. it will be practice/script/org/hotwax/practice.
and for java event controller entry will be like:

```
<request-map uri="createPracticePersonJavaEvent">

    <security https="true" auth="true"/>

    <event type="java" path="org.hotwax.practice.PracticeEvents"
invoke="createPracticePersonJavaEvent"/>

    <response name="success" type="view" value="CreatePracPersonJavaEvent"/>

    <response name="error" type="view" value="CreatePracPersonJavaEvent"/>

</request-map>
```

Here the path is the classpath in which this event is defined.
The file name will be PracticeEvents.java and will be created at practice/src/org/hotwax/practice.

## Simple Event

**Step - 6 :** Now in the script/org/hotwax/practice/ create one file by name PracticeEvents.xml.
**Step - 7 :** Write the event in PracticeEvents.xml file by name createPracticePersonSimpleEvent. (For reference you can go through the event "createUser" from UserEvents.xml from party component)
The event which you will be writing should be the simple one as you just have to process 5 fields coming from the form which are salutation, firstName, middleName, lastName, suffix. and then you have to call the createPracticePerson service.
For processing the field you will be using simple map processor as you have read earlier.
Follow these steps for writing the event:
**7.a** : Process fields coming from the form like:

```
<call-map-processor in-map-name="parameters" out-map-name="createPersonContext">

    <simple-map-processor name="createPersonMap">

        <process field="firstName">

            <copy/>

            <not-empty>

                <fail-property property="PracticeFirstNameMissingError"
resource="PracticeUiLabels"/>

            </not-empty>   

        </process>

    </simple-map-processor>
```

</call-map-processor>

<check-errors/>

**7.b :** Create some Ui labels for showing them in fail-property like PracticeFirstNameMissingError.
**7.c :** Now call service createPracticePerson service by passing out map which is obtained after processing fields as a in map to the service.
**OutPut Screen :**

# Part - 4

## Java Event:

Here the java event which you will be writing will be fairly simple. For reference you can check any of the *Events.java file.

**Step - 1 :** The contents will be :

```
public static String createPracticePersonJavaEvent(HttpServletRequest request,
HttpServletResponse response){

    LocalDispatcher dispatcher = (LocalDispatcher) request.getAttribute("dispatcher");

    GenericDelegator delegator = (GenericDelegator) request.getAttribute("delegator");

}
```

**Step - 2 :** Now you have to process the fields comming from the form like

```
String salutation = (String) request.getParameter("salutation");

String firstName = (String) request.getParameter("firstName");
```

**Step - 3 :** Now prepare a map for the values which you have to pass to the service which you will call "createPracticePerson" . Like

```
Map createPersonCtx = UtilMisc.toMap("salutation", salutation, "firstName", firstName);
```

**Step - 4 :** Then at the end just call the service "createPracticePerson" like

```
try{

    Map person = dispatcher.runSync("createPracticePerson", createPersonCtx);

 }catch (GenericServiceException e){

     Debug.logError(e.toString(), module);

     return "error";

 }

return "success";
```

After writting event in Java don't forget to compile it by running "ant" command. At this moment you will need to add build.xml file to your component directory i.e. at hot-deploy/practice/ For the content of build.xml file you can refer "example" component. Here in build.xml file ensure one thing you are having follwing entry:

```
<target name="classpath">

    <path id="local.class.path">
```

```
        <fileset dir="../../framework/base/lib/j2eespecs" includes="*.jar"/>

    </path>

</target>
```

This will needed for the classes like

```
import javax.servlet.http.HttpServletRequest;

import javax.servlet.http.HttpServletResponse;
```

So create a file by name build.xml and then compile it. It will create a build directory in your component directory which will be containing all *.jar and class files after compilation. For the content of build.xml file you can refere example component.
For running the simple event don't forget to make an entry for <classpath type="dir" location="script"/> in ofbiz-component.xml file.
For running the java event make an entry <classpath type="jar" location="build/lib/*"/> in ofbiz-component.xml file.

## ECA(Event Condition Action):

**ECA** : It is a combinition of 3 things: an *event*, *conditions* per event, and *actions* per event. It is a rule used to trigger an action upon the execution of an event when certain conditions are met. When a service is called for example a lookup is performed to see if any ECAs are defined for this event. Events include before authentication, before IN parameter validation, before actual service invocation, before OUT parameter validation, before transaction commit, or before the service returns. Next, each condition in the ECA definition is evaluated and if all come back as true, each action is performed. An action is just a service which must be defined to work with the parameters already in the service's context. There is no limit to the number of conditions or actions each ECA may define.
For more details on this visit : Service Engine Guide
1. **SECA (Service Event Condition Action)** : This is used when we want to trigger another service(action) on the execution of a service when certain conditions are met.
2. **EECA (Entity Event Condition Action)** : This is used when we want to trigger a service on the creation of a record for an entity when certain conditions are met.
For the implementation of ECA again we will be following the same approach for screens, menus by following steps:
**Step - 1 :** Add one more application menu named "ECA" to the practice application's menu bar. (Do the needful entries for target in controller.xml)
**Step - 2 :** Now create another menu called "EcaMenu" in the PracticeMenus.xml file. This menu will have two menu items named "seca" and "eeca". For each of these, two screens will be needed that use the "CreatePerson" form which we created above. (in personForm screen)

```
<menu name="EcaMenu" default-menu-item-name="seca" default-selected-style="selected"

       type="simple" menu-container-style="button-bar button-style-2"
selected-menuitem-context-field-name="headerItem">
```

```
        <menu-item name="seca" title="Create Person --- SECA">
            <link target="seca"/>
        </menu-item>
        <menu-item name="eeca" title="Create Person --- EECA">
            <link target="eeca"/>
        </menu-item>
</menu>
```

**SECA :**

**Step - 1 :** For this you have to write another service by name "createPartyRoleVisitor", which will be setting the role for the party which will be created by "createPracticePerson" service. The service "createPartyRoleVisitor" will be triggered by the seca rule which you will define for service "createPracticePerson".
In the new service involved entity will by "PartyRole". In "createPartyRoleVisitor" just call service "createPartyRole" which is already implemented.
**Step - 2 :** Now you have to create a file by name "secas.xml" in "servicedef" directory. Seca definition will come here. (Take reference from secas.xml of "party" component). This will be

```
<eca service="createPracticePerson" event="commit">
    <condition field-name="partyId" operator="is-not-empty"/>
    <action service="createPartyRoleVisitor" mode="sync"/>
</eca>
```

**Step - 3 :** Do an entry in ofbiz-component.xml file for this seca definition to to be loaded. It will be :
<service-resource type="eca" loader="main" location="servicedef/secas.xml"/>
Don't forget to restart the server after doing this entry.
Now run the service through form and check the records in PartyRole entity. You will find a role is set for the party created because synchrounously you have triggered another service by seca rule for setting up the role for the party created.

**EECA :**

**Step - 1 :** For this you have to write another service by name "createPartyRoleCustomer", which will be setting the role for the party which will be created means when a record for the entity "Party" will be created this service will be triggered for setting a role customer for that party. The service "createPartyRoleCustomer" will be similar to "createPartyRoleVisitor".

**Step - 2 :** Now you have to create a file by name "eecas.xml" in "entitydef" directory, which will be in your component directory "practice". Eeca definition will come here. (Take reference from eecas.xml of "accounting" component). This will be :

```
<!-- To create party role whenever a party is created -->

<eca entity="Party" operation="create" event="return">

    <condition field-name="partyId" operator="is-not-empty"/>

    <action service="createPartyRoleCustomer" mode="sync"/>

</eca>
```

**Step - 3 :** Do an entry in ofbiz-component.xml file for this seca definition to to be loaded. It will be :

```
<entity-resource type="eca" reader-name="main" loader="main"
location="entitydef/eecas.xml"/>
```

Don't forget to restart the server after doing this entry.
Now run the service through form and check the records in PartyRole entity. You will find a role is set for the party created because synchrounously you have triggered a service by eeca rule for setting up the role for the party created.
The main difference here is that you are triggering a service when an operation is performed on the entity. In our case it is "create".
**Note :** Here you have created a saparate menu to understand the concept separately. As you written seca for the service "createPracticePerson", so where ever in your practice application you will be calling this service that seca will trigger "createPartyRoleVisitor" and on the other hand when a party will be created "createPartyRoleCustomer" will be triggered.
**Output Screen :**


## Group Service:

Group services are used to call more then one services as a group. Service groups are a set of services which should run when calling the initial service. You define a service using the group service engine, and include all the parameters/attributes needed for all the services in the group. The location attribute is not needed for groupservices, the invoke attribute defines the name of the group to run. When this service is invoked the group is

called and the services defined in the group are called as defined.
For mor details on this visit : http://docs.ofbiz.org/display/OFBTECH/Service+Engine+Guide
For the implementation of Group service follow these steps:
**Step - 1 :** Add another menu item to applicatoin menu bar by name "Group Service". (Do the needful entries for target in controller.xml)
**Step - 2 :** Now create new screen and a form for creation of the person because the target for the form will be the group service which we will be defining.
**Note :** Now the time is to define the group service. We will be defining the group service for the services which we have implemented for this practice application.
**Step - 3 :** You will be defining the service group in services.xml file. (Take reference from services.xml of party component).
Just write one more service which will be setting the role "CLIENT" for the party which will be created by createPracticePerson Service.
Create a group service by name "partyGroup" like :

```
<!-- Group service -->

<service name="partyGroup" engine="group" auth="true">

    <description>Creates a party, person and party role Client</description>

    <group>

        <invoke name="createPracticePerson" result-to-context="true"/>

        <invoke name="createPartyRoleClient"/>

    </group>

</service>
```

Don't forget to restart the server before testing it.

## Interface:

The interface service engine has been implemented to help with defining services which share a number of the same parameters. An interface service cannot be invoked, but rather is a defined service which other services inherit from. Each interface service will be defined using the interface engine.
For more details on this visit : http://docs.ofbiz.org/display/OFBTECH/Service+Engine+Guide
For implemeting the interface follow these steps:
**Step - 1 :** Add another menu item to applicatoin menu bar by name "Interface". (Do the needful entries for target in controller.xml)
**Step - 2 :** Create new screen, form and service for creating a person. Here service will implement the interface. (For creating interface take reference from services_fixedasset.xml of accounting component) it will be like :

```
<!-- Peson Interface -->
```

```
<service name="createPersonInterface" engine="interface" location="" invoke="">
    <attribute name="firstName" mode="IN" type="String" optional="false"/>
    <attribute name="middleName" mode="IN" type="String" optional="true"/>
    <attribute name="lastName" mode="IN" type="String" optional="false"/>
    <attribute name="suffix" mode="IN" type="String" optional="true"/>
</service>
<service name="createPracticePersonInterfaceService" engine="simple"
        location="org/hotwax/practice/PracticeServices.xml"
invoke="createPracticePersonInterfaceService" auth="false">
    <description>Creates a new Person</description>
    <implements service="createPersonInterface"/>
    <attribute name="partyId" mode="OUT" type="String" optional="false"/>
    <override name="suffix" optional="false"/>
</service>
```

Here we are implementing an interface and overriding the behaviour of the attribute "suffix", which will have effect when this service will be in action.
Implementation of service createPracticePersonInterfaceService will be the same as createPracticePerson.
Don't forget to restart the server after this implementation.

## Part - 5

### Creating new entity:

For the creation of new entity you can again take a referecne from example component for this you can have a look in entitymodel.xml file of example component. You can create new entities by following these steps:
**Step - 1 :** Create a new subdirectory by name entitydef in hot-deploy/practice/.
**Step - 2 :** Create new file by name entitymodel.xml. This file will contain the defintions of entities which you want to define.
**Step - 3 :** For loading the defintion you need to do an entry in your ofbiz-component.xml file like:

```
<entity-resource type="model" reader-name="main" loader="main"
location="entitydef/entitymodel.xml"/>
```

That implies that when ever you do a change you need to restart the server to have those changes in effect.
At this place an important reading is at
http://docs.ofbiz.org/display/OFBTECH/General+Entity+Overview.
You will rarely find this way to define new entity because you are already having entities there in OFBiz already defined which will be useful for the conduction of your business process. Though you may feel at some place to add more fields to an existing entity so how can you do that? The next  step will show you the way how you can extend an entity for your customized needs.
Earlier we used to have one more file in same directory by name entitygroup.xml which not needed any more because code is checked in to the trunk for this.

## Extending an existing entity:

Yes you can extend an existing entity for adding more fields to for your custom needs. This can be done in following way:
**Step - 1 :** For extending an entity you can do in this manner in the entitydef/entitymodel.xml file of your custom application.

```
<extend-entity entity-name="">

    <field name="" type=""/>

</extend-entity>
```

As an example of this you can refer entitymodel.xml file from party component.
This is the simplest form it can be more complex. This will add up one more field to the entity you already have. Now it depends which field you want for your custom needs. Here you can also defined relation of this field with other entities you want. But before doing this you should search extesively may be you will be adding a field for a purpose and there is already a field which will serve the purpose, so be concisous about this. Also go for a extensive study of data model then do this.
For entity engine configuration dont forget to read : Entity Engine Configuration Guide

## Preparing Data For Custom Application:

For preparing data for your practice application following steps can be performed:
**Step - 1 :** Create new folder in practice by name "data" and create a file in it by name PracticeData.xml.
**Step - 2 :** Now we are going to create the data for a user for this we have to prepare it in a specific order for a party like :

```
<?xml version="1.0" encoding="UTF-8"?>

<entity-engine-xml>
```

```
    <Party partyId="DemoUser" partyTypeId="PERSON"/>

    <Person partyId="DemoUser" firstName="Practice" lastName="Person"/>

    <PartyRole partyId="DemoUser" roleTypeId="VISITOR"/>

    <ContactMech contactMechId="5000" contactMechTypeId="EMAIL_ADDRESS"
infoString="practice.person@gmail.com"/>

    <PartyContactMech partyId="DemoUser" contactMechId="5000" fromDate="2001-05-13
00:00:00.000" allowSolicitation="Y"/>

    <PartyContactMechPurpose partyId="DemoUser" contactMechId="5000"
contactMechPurposeTypeId="PRIMARY_EMAIL" fromDate="2001-05-13 00:00:00.000"/>

</entity-engine-xml>
```

The purpose is to create a record for a party who is a person with a role of VISITOR and creating an email address which is a primary email address for that party.
**Step - 3 :** Now also add website data here which is as follows:

```
<WebSite webSiteId="PRACTICE" siteName="Practice Application"
visualThemeSetId="BACKOFFICE"/>
```

This data is used for theme setup of a specific application and logged in user can change his theme for the back office application.
**Step - 4:** Now we have to an entry in ofbiz-component.xml file :

```
<entity-resource type="data" reader-name="demo" loader="main"
location="data/PracticeData.xml"/>
```

After doing this entry when you will run the command ant run-install to load demo data then the data from this file will be loaded as demo data and once you start the server you can see this record added for person by going to Person Form in practice application or you can prefer to go to https://localhost:8443/webtools/control/entitymaint and find each entity and check the records have gone in the database or not.

## Conclusion:

If you have followed all the steps and developed practice application from this application then this will really help you in understanding other implementations in OFBiz. These things are basic foundation of working in OFBiz. Now you know that how you can start the development in OFBiz. Don't leave the extra links provided in this tutorial as they will really help you a lot in understanding the things which are there.
Here is another good reading will be help you a lot is available at FAQ Tips Tricks Cookbook HowTo
Now the next thing comes in mind is the business process which is really needed to work on, so for this books are available at : OFBiz Related Books

## Examples

# Chapter 19: Performance Tunning

## Performance Analysis and Troubleshooting

This part is from opentaps website.

This is a page to assist with performance analysis and troubleshooting.

## Contents

[hide]


- 1 Monitoring Deadlocks in PostgreSQL
- 2 Suspending Runaway Threads
- 3 Profiling with Aspect Oriented Programming
    - 3.1 Out of the Box Profiling


### Monitoring Deadlocks in PostgreSQL

See Database_Tips#Monitoring_PostgreSQL_Deadlocks

### Suspending Runaway Threads

Suppose you start a process that you realize will take forever and need to stop it. However, it can't be stopped because it was activated by an HTTP request and killing the browser session doesn't work. First, check the log to see if you can identify the thread that is running this process. For instance, suppose you have the following line in your log that corresponds to what your process is doing,

2008-01-23 18:55:47,585 (TP-Processor10) [ Something.java:1015:WARN ] Something that identifies your process

This thread is TP-Processor10. You can use the Java Thread API to suspend it by hand. The easiest way to do this is to use a bsh script or the bsh terminal. First, you will want to know the number of threads in the system. Load up **Webtools -> Jobs -> Thread List** and count the rough number of threads displayed. Suppose you have about 50 threads.

Once you know the rough size, run the following script, either via the bsh terminal or by hooking it up to a controller.xml request,

```
threads = new Thread[50];
size = Thread.enumerate(threads);
for (i = 0; i < size; i++) {
    print(i + ": " + threads[i]);
}
```

This will print out the index and name of each thread. Find the index of TP-Processor 10. Suppose it is index 37. You can then suspend the thread by doing this,

```
t = threads[37];
t.suspend();
```

## Profiling with Aspect Oriented Programming

In opentaps 1.0, profiling is done using Aspect Oriented Programming. AOP provides us with the ability to specify measurement points around any part of the code without having to modify the Java code itself. This is a brief tutorial on how to take advantage of this to profile suspected problem spots in the system. For more information, see Aspect Oriented Programming in opentaps

Performance monitoring is accomplished using the JETM library, which comes with opentaps.

### Out of the Box Profiling

Presently, performance profiling can be triggered by running the tests. First thing is to compile the system and tests as normal. Then, you will want to compile profiling support as follows,

```
$ ant -f hot-deploy/opentaps-common/build.xml profiling
```

This will apply the profiling aspects using bytecode weaving, a process which modifies the existing jars and inserts new bytecode that represents our profiling code.

Make sure that the **run-tests** target in the main **build.xml** file does not have any dependencies. Otherwise, when you run the tests, it will recompile the codebase without the aspects. This is a more efficient setup for testing anyway, since we do not want to recompile the entire system. When ready, run the tests,

```
$ ant run-tests
```

Then when you look at the logs, you have:

- A confirmation the profiling library is loaded.

Example:

```
* Start JETM monitoring
* JETM 1.2.2 started.
```

- A table with all the profiling details.

Example:

TODO: Put an example here

# Running Tsung against opentaps server

From Opentaps Wiki

Jump to: navigation, search

This is a page to assist with running tsung against opentaps server.

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[hide]


- 1 Installing tsung
- 2 Quick start
- 3 Configuration file
    - 3.1 readcsv.erl
    - 3.2 tsung.xml
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        - 3.2.2 Configuration of the server
        - 3.2.3 Configuration of the monitoring (cpu, memory, network)
        - 3.2.4 Arrival of the clients on the tested server
        - 3.2.5 The different options
    - 3.3 userlist.csv
- 4 Logs, Reports and Graphics generated

    - 4.1 Logs
    - 4.2 Reports
    - 4.3 Graphics
- 5 Troubleshooting


## Installing tsung

- Homepage http://tsung.erlang-projects.org/
- Download page http://tsung.erlang-projects.org/dist/
- Documentation http://tsung.erlang-projects.org/user_manual.html

Tsung needs the erlang platform to be installed. We will not extend over it, because rpm or deb versions just runs fine. http://www.erlang.org/

Tsung is a tool only available for linux platform under binary form. Maybe it could be runned against windows with the erlang windows version and the cygwin platform.

We used Tsung with erlang 5.6.1 or 13.2.2. The version 1.2.2 has some problem linked to xml parsing, newer version like 1.3.1 should work as well. In the rest of this document we will assume the version 1.2.0.

You may want to modify tsung-1.2.0/src/tsung_controller/ts_os_mon.erl, depending on which platform you are running the opentaps server. The scripts which do the os monitoring (cpu, memory and network graphs) may not be convenient for your platform.

Compilation

- For debian users, just type fakeroot debian/rules binary.
- For the others a ./configure, make, make install will do it.

## Quick start

```
$ cd hot-deploy/opentaps-tests/scripts/tsung/
$ erlc readcsv.erl
$ tsung -f tsung.xml start
```

then goto the log directory (default ~/.tsung/logs/YYYYMMDD-HH:SS).

```
$ /usr/lib/tsung/bin/tsung_stats.pl
```

open *report.html* in a web browser.

## Configuration file

The configuration file and all the file needed to do a tsung stress testing are available in the directory hot-deploy/opentaps-tests/scripts/tsung/

- readcsv.erl a small erlang script used to generate the login string from the user and password read
- tsung.xml the configuration file for tsung
- userlist.csv the list of the users which will be used successively to login

### readcsv.erl

In this file, there is only one function called user. The step done are:

- ts_file_server:get_next_line() to read one line in the file
- string:tokens(Line,";") to separate the user and the password
- "USERNAME=" ++ Username ++"&PASSWORD=" ++ Passwd to return the login string

You have to compile this file

$ erlc readcsv.erl

You will get a file called readcsv.beam, which you have to copy in the tsung binary directory (note: no longer necessary when running tsung from the same directory in newer versions). In our case it is

/usr/lib/erlang/lib/tsung-1.2.0/ebin/

### tsung.xml

The tsung.xml file is the configuration file which has the different scenarios to execute. There is some comments in there.

Here is an overview:

#### Configuration of the client

By default only one http client is configured which is localhost. You can configure as many http clients as you want. The computer which fires the tests must have a ssh access with passphrase.

```
  <clients>
```

```
    <client host="localhost" use_controller_vm="true"/>
  </clients>
```

## Configuration of the server

By default the opentaps http server is configured on localhost:8443. You can change it too.

```
  <servers>
    <server host="localhost" port="8443" type="ssl"/>
  </servers>
```

## Configuration of the monitoring (cpu, memory, network)

The monitoring has to be configured to access the opentaps server. In our case it is localhost. The computer which fires the tests must have a ssh access with passphrase.

```
  <monitoring>
    <monitor host="localhost" type="erlang"/>
  </monitoring>
```

## Arrival of the clients on the tested server

It is configured in the load node and by a phase system. For each phase you put the duration of the phase and the frequency of arrival of the clients. You can have as many phase as you want. In this case, there is one phase of one minute which is configured, where clients arrived each 25 seconds. We will have 4 clients.

```
  <load>
   <arrivalphase phase="1" duration="1" unit="minute">
     <users interarrival="25" unit="second"/>
   </arrivalphase>
  </load>
```

## The different options

- user_agent UserAgent string to use
- thinktime The thinktime of a user between his last response received and the next request he will send.
- file_server the file with the login

```
  <options>
```

```
    <!-- which type of client are we going to fire -->
   <option type="ts_http" name="user_agent">
    <user_agent probability="80">Mozilla/5.0 (X11; U; Linux i686; en-US; rv:1.7.8)
Gecko/20050513 Galeon/1.3.21</user_agent>
    <user_agent probability="20">Mozilla/5.0 (Windows; U; Windows NT 5.2; fr-FR; rv:1.7.8)
Gecko/20050511 Firefox/1.0.4</user_agent>
   </option>
    <!-- Each client has a random thinktime (time between two request) around 3 -->
   <option name="thinktime" value="3" random="true" override="true"/>
    <!-- TOBEMODIFIED Absolute path for the file from which we generate the login and password
-->
   <option name="file_server" value="userlist.csv"/>
  </options>
```

### userlist.csv

It is a basic csv file which associate on one line a user and a password separated by a ; ie

DemoSalesManager;crmsfa

This users will be used successively to login into the opentaps server.

## Logs, Reports and Graphics generated

### Logs

In the directory ~/.tsung/log/ you will get the logs file.

- tsung_controller@FabsLaptop.log is the log where you can have the errors related to tsung
- tsung.dump is the dump of all the requests and responses generated
- tsung.log is used to generate the reports and graphics
- tsung.xml is the configuration file

To generate the reports and graphics, just execute /usr/lib/tsung/bin/tsung_stats.pl in the directory of logs.

You can then open the generated *report.html* in a web browser.

## Reports

- Main statistics

| Name | highest mean value | lowest mean value | Highest Rate |
|---|---|---|---|
| connect | 0.367786 sec | 0.0673032 sec | 0.2 / sec |
| page | 83.8528 sec | 22.6659 sec | 0.2 / sec |
| request | 6.64617 sec | 1.07933 sec | 1.2 / sec |
| session | 83.8569 sec | 22.67 sec | 0.2 / sec |

connect is the time to make a tcp connect page is the time to download a whole page request is the time to send a request session is the time to get through a scenario node in the configuration file (in our case, to create and approve an order)

- Transactions Statistics

| Name | highest mean value | Highest Rate |
|---|---|---|
| tr_approveSalesOrder | 18.8349 sec | 0.2 / sec |
| tr_createSalesOrder | 65.5902 sec | 0.2 / sec |
| tr_login | 12.0059 sec | 0.2 / sec |

tr_approveSalesOrder is the time to get through the transaction node in the configuration file called approveSalesOrder tr_createSalesOrder is the time to get through the transaction node in the configuration file called createSalesOrder tr_login is the time to get through the transaction node in the configuration file called login

- Network Throughput

| Name | Highest Rate | Total |
|---|---|---|
| size_rcv | 163.77 Kb/sec | 2.30 MB |
| size_sent | 2.96 Kb/sec | 0.05 MB |

size_rcv is the quantity of bits received size_sent is the quantity of bits sent

- Counters Statistics

| Name | Highest Rate | Total number |
|---|---|---|
| finish_users_count | 0.2 / sec | 10 |
| match | 0.2 / sec | 19 |
| newphase | 0.1 / sec | 4 |
| nomatch | 0.2 / sec | 2 |
| users_count | 0.2 / sec | 10 |

finish_users_count match is the quantity of verification done by the match node, which success newphase nomatch is the quantity of verification done by the match node, which fails users_count is the quantity of users generated

- Server monitoring

| Name | highest mean value | lowest mean value |
|---|---|---|
| cpu:os_mon@localhost | 82.4587 % | 13.8529 % |
| freemem:os_mon@localhost | 1456.75 MB | 1243.55 MB |
| recvpackets:os_mon@localhost | 3126.00 / sec | 487 / sec |
| sentpackets:os_mon@localhost | 3126.00 / sec | 487 / sec |

cpu is the consumption of cpu freemem is the free memory available recvpackets is the quantity of bits received sentpackets is the quantity of bits sent

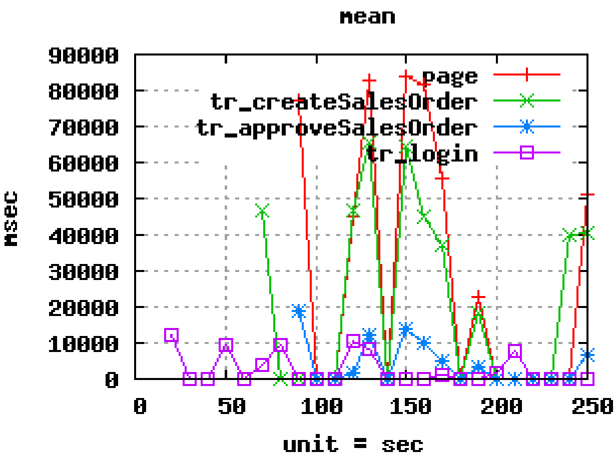
- HTTP return code

| Code | Highest Rate | Total number |
|---|---|---|
| 200 | 1 / sec | 122 |
| 302 | 0.3 / sec | 38 |

The apparition of the different http code. We observe 200, which is the normal http back code, and 302, which is received sometimes. This is normal I observe both during the building of the scenario.

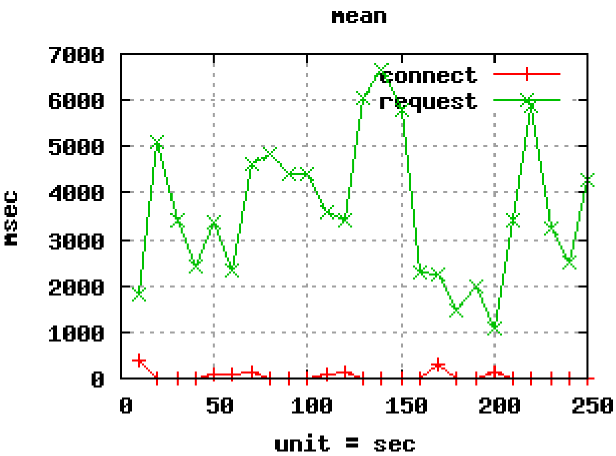
## Graphics

- Response Time




Mean

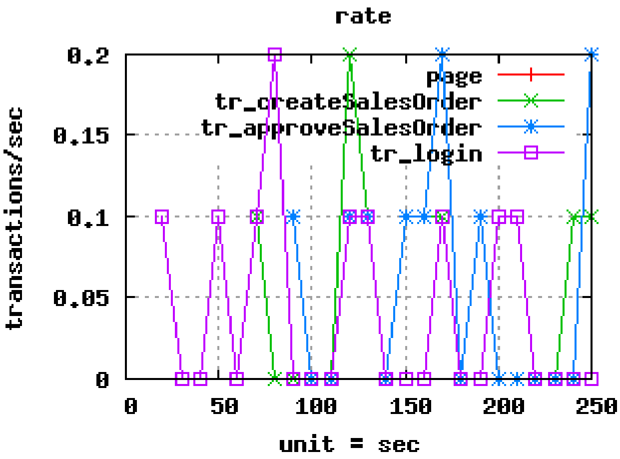
page correspond to the mean time to charge one page tr_* correspond to the mean time to charge one page in the specified transaction




Mean

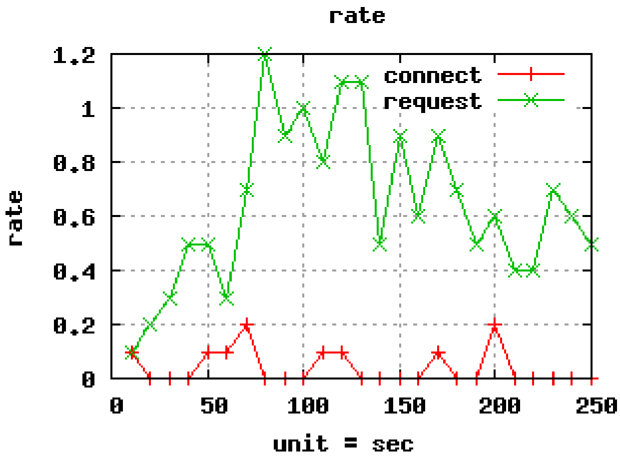
connect correpond to the mean time to do a tcp connect request correspond to the mean time to do a http request

- Throughput



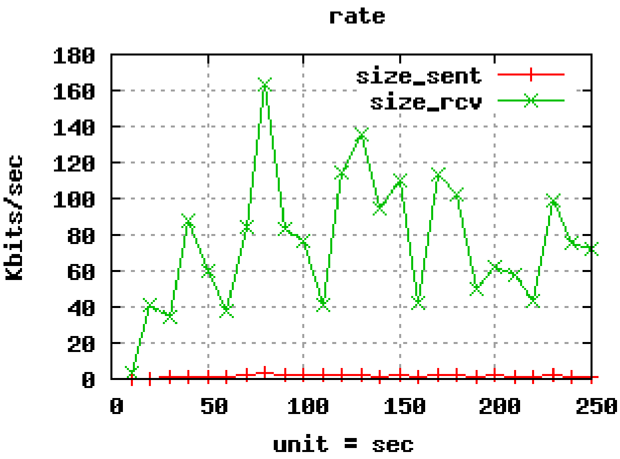

Rate

page correspond to the mean time to charge one page tr_* correspond to the mean time to charge one page in the specified transaction

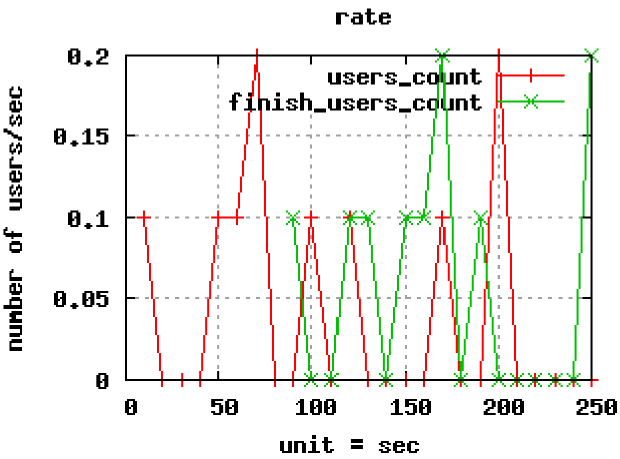



Rate

connect correpond to the mean time to do a tcp connect request correspond to the mean time to do a http request

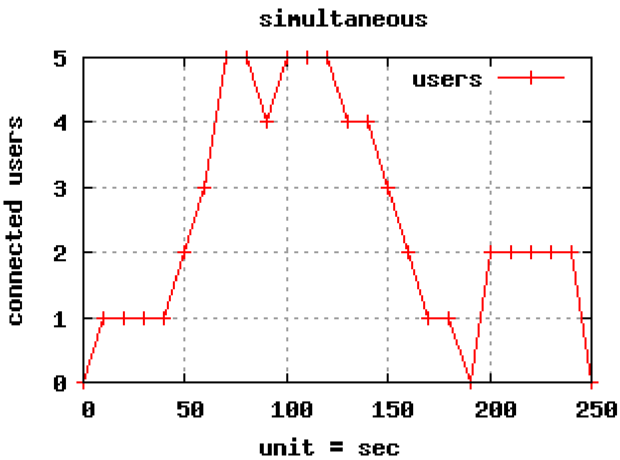



Quantity of bit sent and received

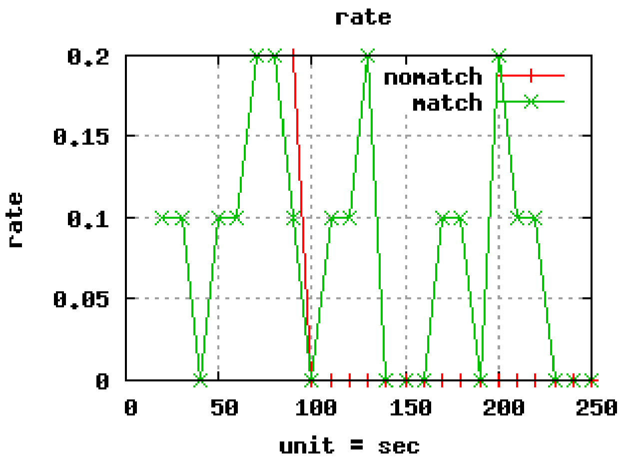



Quantity of users doing an operation at the same time

- Simultaneous Users

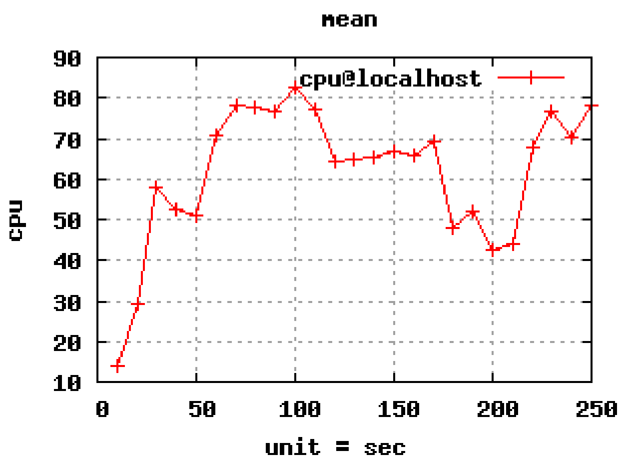


simultaneous users

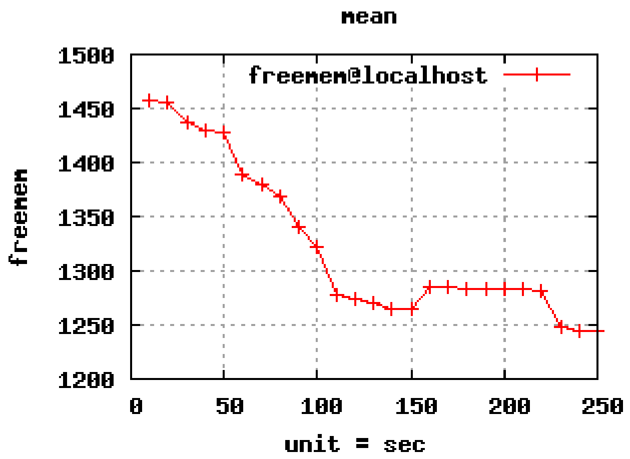



Matching response or not

- Server OS monitoring

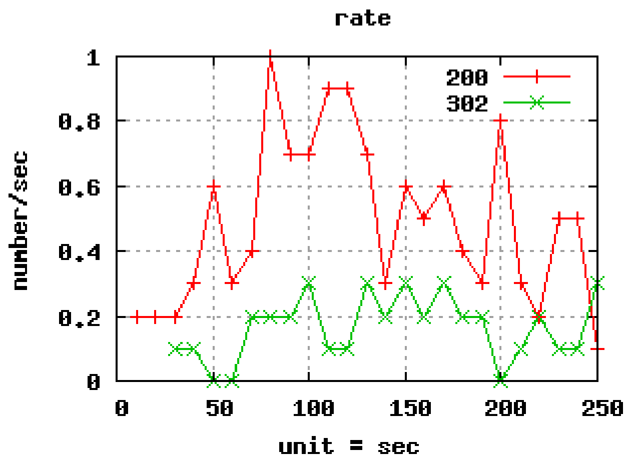



cpu mean




freemem mean

- HTTP return code Status (rate)




different http code returned

## Troubleshooting

When writing custom tsung transaction (series of requests), make sure to use POST for request that are for ofbiz services, else you will have a security error message in the log.

In order to test more than 100 concurrent transactions with, your would first need to increase the number of threads in the connectors configuration in framework/base/config/ofbiz-containers.xml (see http-connector, https-connector, ajp-connector). Else you will see the actual number of connected users capped to the max thread value in the tsung report.

# Database Tips

From Opentaps Wiki
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- 2 PostgreSQL Tips
  - 2.1 Monitoring PostgreSQL Deadlocks
  - 2.2 Checking Open PostgreSQL Connections
- 3 MySQL Tips
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  - 3.2 UTF-8 Support
  - 3.3 Lock Timeout
- 4 DB2 Tips
  - 4.1 DB2 Basics
  - 4.2 Making DB2 Work
- 5 Mysql Tips


## General

- J2EE Transaction Management
- Nested Transactions
- JDBC Best Practices

## PostgreSQL Tips

- PostgreSQL Wiki Article on Performance Optimization
- Optimizing PostgreSQL
- Practical PostgreSQL Query Analysis

### Monitoring PostgreSQL Deadlocks

You can monitor any database locks using the Entity SQL Processor in **Webtools -> Entity SQL Processor** with the following query,

```
select pg_class.relname, pg_locks.mode, pg_locks.relation, pg_locks.transaction,
pg_locks.pid
    from pg_class, pg_locks
    where pg_class.relfilenode = pg_locks.relation
    order by pid
```

This will show what kinds of locks are active on what entities. If there is an exclusive lock on a table followed by a bunch of pids that are waiting for it, then you have a deadlock.

### Checking Open PostgreSQL Connections

Run this query:

```
 select datname, numbackends from pg_stat_database;
```

to see the number of open connections to each of your databases. See [How to Know Number of Connections Made with Database - PostgreSQL]

If you are running out of connections, edit the file framework/entity/config/entityengine.xml and increase the number of connections available.

## MySQL Tips

### Table Name Case Sensitivity

If you use Linux or Unix for your MySQL server, the table names may be case sensitive, so PRODUCT and product are not the same table. You can turn this off by configuring mysqld on startup to ignore table names with the lower-case-table-names flag, such as this example from /etc/init.d/mysql:

```
 $bindir/mysqld_safe --datadir=$datadir --lower-case-table-names=1
--pid-file=$server_pid_file $other_args >/dev/null 2>&1 &
```

See [MySQL manual on identifier case sentivity]

## UTF-8 Support

By default, MySQL supports the Latin1 character set, which is intended for European languages such as English. If you wish to use MySQL for other language types, you may need to set up a database or UTF-8 character set encoding. To do this, you would need to create your database using UTF-8 first:

```
mysql> create database opentaps default character set utf8 collate utf8_general_ci;
```

Then you would need to set your framework/entity/config/entityengine.xml file for the MySQL database to use the UTF-8 character set:

```
character-set="utf8"
collate="utf8_general_ci"
```

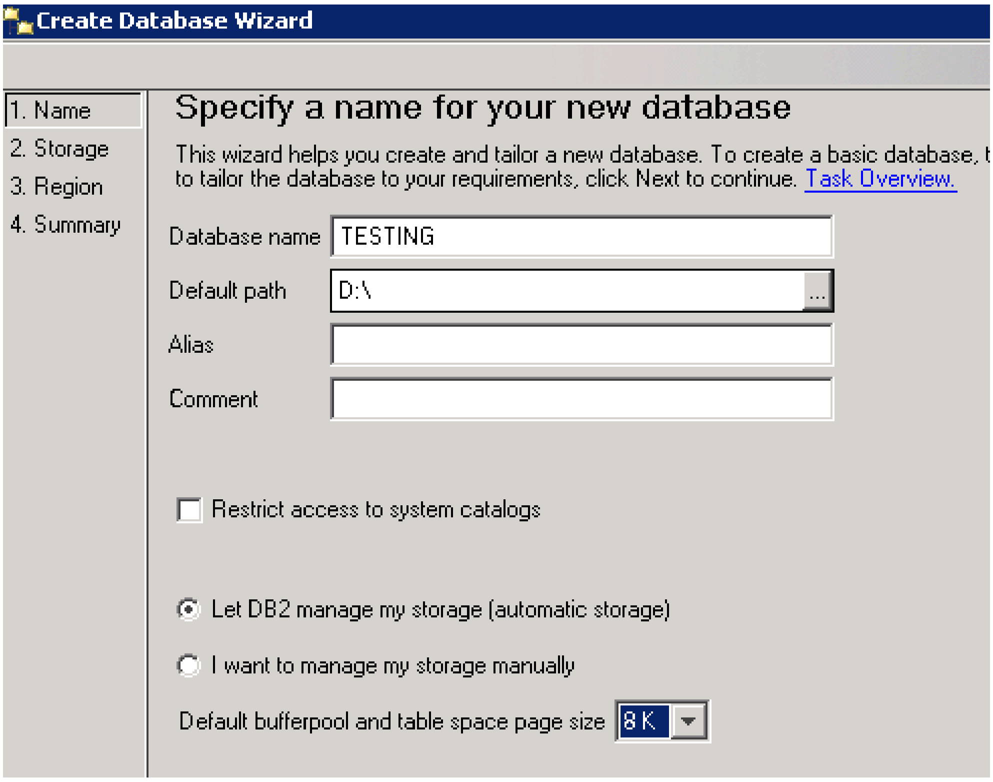
Note that it is not clear that my SQL supports case sensitive UTF-8 coalition at this point, although you may be able to use UTF-8 binary collation.

## Lock Timeout

# DB2 Tips

## DB2 Basics

You must configure DB2 to have tablespaces of 8K or more. This can be done when you create the database from the Control Center:




If you get an error message from DB2, you will get a SQLCODE like below:

DB2 SQL Error: SQLCODE=-270, SQLSTATE=42997, SQLERRMC=63, DRIVER=3.50.152

To figure out what it is, you have to run db2 from the command line:

$ db2 ? sql-270

Some of the more popular codes are:

- SQL-204: <name> not recognized. Most likely, you are referencing a table that doesn't exist.

- SQL-270: Function not supported. See the SQLERRMC for the message code. If you get sql-270 with sqlerrmc=63, it means that you are trying to select a CLOB/BLOB type with a scroll insensitive cursor.
- SQL-286: insufficient page size for CREATE TABLE
- SQL-530: foreign key violation
- SQL-803: operation violates a unique value constraint

## Making DB2 Work

There are three issues with using DB2 and opentaps:

1. You must define a fieldtypedb2.xml file for your framework/entity/fieldtype/ directory. You can Start with the field type XML from another database, such as MySQL. Most of the valid DB2 field types are similar, but DB2 does not have a "NUMERIC" type. It is called "DECIMAL" instead of must be used for floating-point and currency field types.
2. On startup, the ofbiz entity engine does a check of the database against the entity model definitions. Part of the check is to verify that the primary keys of all the tables are correctly defined, but the entity engine attempts to obtain the primary key information for all the tables of the database at once, which is not supported by DB2. To make this feature work, you need to modify DatabaseUtil.java to have the entity engine check the primary keys one table at a time.
3. The biggest problem with DB2 is that it does not support SELECT operations which include CLOB/BLOB fields when the ResultSet is scroll insensitive (See [1].) The solution is not as simple as just changing the result set type, because DB2 also does not support (i) SELECT operations on views or with JOIN using scroll sensitive cursor or (ii) moving around with .absolute(i) or .relative(i) operations on a ResultSet of TYPE_FORWARD_ONLY. This means that the view entities which include CLOB/BLOB types cannot be SELECTED (because you cannot use a scroll insensitive ResultSet), or that the EntityListIterator.getPartialList method will not work (because you cannot use .absolute and .relative), so the ofbiz form widget's list form will not paginate correctly. There is no solution for this problem, but the following workarounds exist:
    1. Since the majority of the large object (LOB) types are CLOB for long character strings, you can redefine the field type for your blob and very-long to be the longest possible VARCHAR instead of using CLOB.
    2. You can avoid using the getPartialList feature and instead use findAll or findByAnd to return a Java list, and then use the sublist() method on it. These queries are done with TYPE_FORWARD_ONLY and return the entire list at once, but the drawback is that a Java list has a limited capacity of about 65,000 records.
    3. If neither of these workarounds are acceptable, you would have to rewrite certain features (like surveys with long text responses) to conform to DB2's restrictions.

In practice, most ERP-related uses of opentaps would not require CLOB's, so the first option should suffice. Only with content management features would such field types be required, and those features would need to be rewritten for DB2 compatibility.

## Mysql Tips

You must change innodb_lock_wait_timeout parameter , else you might get error like these:

 Lock wait timeout exceeded; try restarting transaction

You can add this line in your mysql config (Windows: [MYSQL_HOME]\my.ini, Linux: /etc/my.cnf)

```
#set lock timeout 300s, default is 50s
innodb_lock_wait_timeout=300
```

# Appendix A

## Is OFBiz for Me

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### Introduction

This document is all about the question: Is Open For Business for Me? We have talked to many who are using or considering using Open For Business. We have also talked to many who are trying to leverage OFBiz in their business as a tool or a starting point for more focused endeavors. This document is based on all of that feedback and includes ideas from dozens of discussions with those who are benefiting from OFBiz right now.
There are many ways that OFBiz can be used, many different circumstances where OFBiz can be of value, and many organizations that could benefit from the use of OFBiz.

### Asking Build vs. Buy

Build versus buy is a common question for many companies, especially those with special needs or who want to automate unique processes. The difficulty exists because even though an ERP/CRM package can deliver 80% of what you need because of the difficulty of modifying and integrating

with the software the remaining 20% can require a great deal of cost and effort, often as much as 80% of the total solution cost.
With OFBiz as an option a much better question than build vs. buy is: "Build vs. Buy vs. OFBiz." Because of the architecture and techniques used in OFBiz, and because it is open source, you can change any component you need to, or even attach logic in various places without modifying the existing logic. With OFBiz your customization needs can be implemented for even less than if you wrote your entire solution yourself. In other words, if you build the whole solution yourself the 20% of the functionality that is custom to your business will likely require about 20% of the total solution cost. If you use OFBiz and customize it to your needs you will probably be able to implement the same functionality for 25-50% of what it would cost developing it yourself as part of a solution from scratch.
With OFBiz you get the best of both worlds. You get the initial functionality that provides most of what you need just like you would with the buy option. You can make the software do anything you want, just like you could with the build option. You save on the initial and maintenance license costs just as you would with the build option. You get a tested and proven architecture and a best-practices based design without having to hire a group of experts, just like you would get with the buy option.

## Budget Conscious Organization

Does your organization have a tight budget, but the cheaper solutions are not flexible enough? If you spend all of your budget on the licensing and maintenance costs of the software that does what you need will you have anything left to customize it to your needs? Are you worried about spending tens or hundreds of thousands, or even millions, of dollars on licensing without knowing whether or not the solution will work for you?
If your project or company is very budget sensitive then OFBiz can reduce your initial risk AND you total solution cost, not to you mention the ongoing cost of ownership.
Even if you have plenty of money for your project, wouldn't you rather spend that money on exactly what you need instead of hundreds of features that are part of a bloated package with a bloated price?

## Have Custom Needs

The needs and practices of different organizations vary a great deal in different industries. Even in the same industry the ability to compete well in a crowded marketplace often requires that a business be able to change and improve its practices and it is nice when these new practices can be automated and the software can elegantly handle changes in the organization. With closed source solutions you rarely have the option of changing the included software. In fact, most licensing agreements prohibit reverse engineering so if you want it to work differently you have to re-write the whole thing from scratch. We have worked with companies that have such systems and they often end up with so much "bandaid" code and so much business logic slipped into integration code that the maintenance costs stretch or exceed the limits of the ongoing allocated budget. Many desired features are rejected as "impossible" because

adding it in place will have unpredictable consequences, and adding in other places will cost more than is available.
Open For Business is meant to customized. The included applications and components are based on best-practices and can be effectively used as is, but the architecture was designed so that modifying, supplementing, or replacing components can be easily done without affecting the stability of the rest of the system.
This will not only save you money, but it will make it possible for you to implement changes that would otherwise be ″impossible.″

## Consulting/Services Company

The most common question asked about open source software is ″how do you make money with it?″ The most common answer to that question, among professional and amateur alike, is ″by providing services based on the software!″
SoftwareDevelopment

### Software Development

Offering software development services based on open source software is a very natural and valuable service. Because the original software is open source it is possible to hire someone to modify or add to it. One of the main attractions of open source software is that because the source code is available it can be customized or issues can be resolved quickly without having to go through the maker of the software.
This is especially true of enterprise software like OFBiz. We do all we can to make the applications generic and flexible, but it is impossible to satisfy the needs of everyone who uses it with what is offered as part of the core project. Most companies will have sufficient resources to hire someone to add customizations for them. Such arrangements can range from a few hundred dollars to tens of thousands or even millions of dollars. Generally as more money is involved quite a bit more custom functionality and integration with other systems is required.
BusinessAnalysis&Design

### Business Analysis & Design

Many companies that need information automation software don't know exactly what they need or where they can get it. Helping with these questions requires a combination of business experience and knowledge, and some familiarity with available software packages that can help satisfy the needs of the client. Because the risk of failure is often highest at this stage of a project the rewards for good work can be substantial. This is especially true when a group can demonstrate a history of success.

With Open For Business you can get on your client's good side by recommending a solution that not only has no licensing fees, but can be easily customized. This means that you can actually use all of the good ideas you come up with in the analysis and design phase.
WebDesign

## Web Design

Even organizations that don't require fancy software often desire to have a well done web site. If you are doing web site design right now, chances are you have clients that have grown or have become more ambitious and would like to have eCommerce or other functionality on their customer facing or internal web site. Introducing your clients to Open For Business may help them find what they need and give you good work along the way. And if you don't have technical skills for hosting or deployment in house, don't worry, there are many other groups you can work or partner with who can help with just that.
Companies that have customer facing eCommerce sites often want to update and improve the layout and design of their site(s). Some companies even regularly update large portions of their sites for promotions, current events based specials and so on. Sometimes these companies have employees that do this work, but it is more common to see companies that want to outsource the look, feel and content of their site.
These services are especially valuable coming from a web design group that has special talent such a artists and marketers. Because OFBiz is flexible and easy to change and maintain you can offer your clients the best of your creativity.
Hosting

## Hosting

Even if a customer does have sufficient money for a great solution they don't always have the expertise or desire in house to keep that solution running. Larger companies do often have staff and systems in place to host their applications, but there are thousands upon thousands of small and medium sized companies that do not. When you consider the cost of the facilities needed for reliable hosting it makes sense to let someone else take care of that, someone who already has those facilities in place an working well for many other organizations.
Because Open For Business is based on a distributable architecture and primarily uses a web based user interface it is easy to use business applications that are remotely hosted. But this is just one possibility for OFBiz hosting.
One of the most significant needs for hosting is for customer facing sites such as eCommerce sites. Many companies prefer to have such sites hosted remotely at specialised hosting facilities because they are more reliable than on-site facilities given redundant internet connections, redundant power sources and so on. This is true even when the company has most of their systems hosted on-site. So, there are even bigger opportunities for eCommerce hosting.

## Product Development Company

Just because the functionality in Open For Business makes good sense to implement and maintain as part of an open source solution it doesn't mean that ALL software functionality makes sense for open source licensing.

Open For Business provides generic functionality that is useful to nearly all modern businesses and other organizations. However, we can't reasonably try to address the needs of every niche industry or large business in the world.

We have receive a LOT of feedback asking about why we don't add this or that feature, or cater better to the needs of this or that group. For instance, why don't we create a distribution focused on making it easy for small businesses to deploy and ecommerce solution? And why don't break out this or that framework component or create a special framework project with graphical development tools and the works?

It is difficult to do everything and we have to limit the scope somewhere. But even more important than that is that these are GREAT ideas for potential businesses. These are things that people would likely be willing to PAY for.

There are dozens or hundreds of niche markets or types of businesses that a special software package could be created for. Without OFBiz you would have to target a MUCH wider or larger market in order to sell enough licenses and other services to finance the cost of the creation of the software. Like every good marketing student knows: the more focused your marketing message is the better chance you have of getting the message about your product into the minds of those who might want to purchase it.

By basing your product on OFBiz you can focus on the functionality that makes your product unique and the functionality that serves the needs of your customers. You don't have to worry about architecture and scalability issues. You don't have to worry about basic functionality, general data modeling, and so forth. You can start with 80% of your final product already in place, and just worry about the 20% that you can really use to focus your market position. Plus, you reduce your client's risk in purchasing your product because if anything goes wrong they can easily find other service providers to serve their needs.

A special case of this opportunity is the option of providing applications as services. The Open For Business architecture supports making applications available remotely with only a web browser installed at the client site. This makes it possible to target even smaller companies.

With a little work the OFBiz applications could be customized to allow for the deployment of dozens or hundreds of instances on a single server. Most companies, even Ma' and Pa' car sales shops, could afford a couple or a few hundred dollars a month for a solution that takes care of their accounting, product and inventory maintenance, online as well as live sales, and the many other needs that such a company would have

Even for larger clients they may prefer the option you totally outsourcing the solution and letting you host it as well as develop and maintain it for them.

There are so many opportunities for creating commercial variations of OFBiz that this is one of the big things that we want to get into once the project is to a point where the majority of the functionality needed for basic business operation is in place.

## eCommerce Hosting

If you are currently hosting eCommerce clients, chances are you have a small group of clients who are excellent customers but who are growing out of the solution you provide. They may already be asking you about upgrade options and you may be worried about losing a customer or at least potential business from that customer because you can no longer meet their needs.
Open For Business gives you the perfect solution to this problem. There are no licensing fees, so you don't have to worry about the sticker shock of a $30K, $50K, $200K or even greater than a one million dollar license fee, not to mention the maintenance license and customization costs. But, OFBiz easily competes with these larger packages and has not only won contracts competing with such expensive packages, but has also been used to replace them.
One of the most mature and feature-rich aspects of OFBiz is the eCommerce solution. It has been used for many different live sites, and more are popping up all the time. We are constantly receiving feedback and contributions of improvements to the eCommerce application and related components.
What is even better is that you can keep your client. You can continue hosting their eCommerce solution and you can either do your own customization, deployment and maintenance or you can outsource any or all of those tasks to other OFBiz service providers. We can train you for any of these services you want to provide, or we can help you find an OFBiz affiliate to provide the service for you.

## User of an eCommerce Package

So, you already have an eCommerce package in place. That's great. Transitioning to Open For Business is even easier when you already know what you are doing. But why would you want to make the switch to OFBiz?
We have worked with lots of people who have moved from other systems. These are the main reasons why:

- The current solution does not have desired features, is not flexible and customizable enough, and/or cannot integrate with other systems (either within the company or in partner companies).
- The license or license maintenance fees of the current solution are just too much for what the system is delivering.
- The current solution cannot scale sufficiently to handle the increased traffic on the site as it grows.

Open For Business gives you the perfect solution to these problems. There are no licensing fees, so you will save a ton of money there. It is easy to customize, so will save money and get more of the features that will set your business apart. OFBiz easily competes with the largest packages on the market and has not only won contracts competing with such expensive packages, but has also been used to replace them.
One of the most mature and feature-rich aspects of OFBiz is the eCommerce solution. It has been used for many different live sites, and more are popping up all the time. We are constantly receiving feedback and contributions of improvements to the eCommerce application and related components.

## Application Server Vendor

If you are a J2EE based application server vendor you are probably dealing with the question of how to differentiate your offering from the competition in such a saturated market. OFBiz has to have a good app server to run well. That's a given. The big opportunity for both of us comes into play when you consider that an app server can be benefited by those who are using OFBiz. We have helped many companies buy app servers to run OFBiz on. In general it is a great complement to any application server offering.
Offering OFBiz with your app server will not only give you a great eCommerce package and suite of enterprise applications, it also gives you an advanced, flexible framework that effectively uses many different open source tools. This can serve as a basis for an offering that helps your customers develop J2EE applications faster and more effectively than ever before.
We have sample configurations for many different app servers, and configuring new ones is not difficult. There are no licensing fees for OFBiz, so you don't have to worry about increasing your price or costs.

## Some Questions and Answers collected on user ML

### Reports & analytics capabilities

OFBiz currently has a few dozens pre-written reports OOTB, and more can be added using the OFBiz tools, or an external reporting tool (which is still very common, ie companies that use something like Crystal Reports or Business Objects will use that with their OFBiz applications). OFBiz has tools in the framework to facilitate building of user interfaces, and these same tools are used for building reports. This provides a high level of efficiency, and allows developers to use the same tools they are used to... and in some cases scripts and other things can even be reused in reports.
OFBiz also includes some BI infrastructure to support defining and populating star schemas, which can then be used for ad-hoc or pre-written reports. A limited star schema exists, and work is going on to extend it.

### Integration and Interoperability (SOA Architecture, Web Services offered)

The OFBiz logic layer is itself a Service-Oriented tool, and all primary logic in OFBiz is implemented as services. Many of these services can be exposed externally as web services automatically, and the more complex ones can be exposed as web services (or call web services) through web services code that maps to them.

## OFBiz Workflow (EDA Architecture)

Though you may find two Workflow Engines in OFBiz (in specialpurpose : workflow and shark directories) OFBIz itself does not use a Workflow Engine. It has been tried, but OFBiz is finally using EDA through its concept of ECA (Event Condition Action)

## Usability (for final customers, and administrators)

Usability is very subjective, but I'll try to answer in a helpful way.
OFBiz is often customized for larger organizations, and in those cases the best usability is achieved by analyzing processes and then building user interfaces to directly support those processes. This results in something specific to end-user requirements and is far better than any OOTB user interface that even the best designers could create without specific requirements.
That is the main design goal behind OFBiz: easy customization since the only way to get a really good UI is to do so based on very specific requirements... and those requirements tend to change dramatically between organizations, in many cases even organizations in the same industry.
The OOTB user interfaces are primarily meant for easy reuse in custom user interfaces, so they mostly avoid automating any specific process and are instead meant to fit into any process desired. However, using the OOTB interfaces is pretty common and is usually best done by documenting where and how to do common tasks according to the processes of the organization. In other words, instead of creating a custom UI when you are on a tighter budget you can simply document how to use the OOTB interfaces, and while not usually excellent this way it is quite adequate for smaller organizations and gives them more functionality and ability to automate things than they would have in most software, allowing them to avoid large numbers of spreadsheets and such. Overall this results in tools to keep track and automate organizational information that are far more efficient and usable that a hodge-podge of various systems.

## Personalization potential

Personalization is an extremely general term, broadly meaning behavior or data that changes according to the user. There are hundreds of features in OFBiz ecommerce and the OFBiz back-end (manager) apps that would fit this description. Please feel free to send over more details and I (or others) will be happy to comment on them.

## Multidevice sites available?

It is pretty easy to build sites targeted at different devices, and there are some available OOTB. If by "device" you mean a specific UI then the hhfacility component is a good example.

If by "device" you mean specific hardware control (like cash drawers and CC scanners), then the POS component (Point Of Sale) has some good stuff.

### Accessibility considered?

There could be 2 acceptations here

- Ergonomy
  - In ecommerce the templates are often changed so much that accessibility ends up more in the hands of the designers and developers who customize the system (so make sure you have a good service provider!). The OOTB ecommerce templates do a pretty good job of this by using styled text instead of images, alt-text on images, and so on.
  - For the OOTB (Out Of The Box) back-end functionality, accessibility is considered, and to be maintained it must be considered in customizations. These are primarily web-based applications and to improve accessibility are very text-heavy, etc.
  - Note also that OFBiz back-end is able to be read from let to right or right to left (try Chinese or Arab languages to check)
- For disabled persons
  - We did some effort in the back-end part of OFBiz. Sight disabled persons should be able to work with OFBiz without too much pain. For instance, following Jeffrey Zeldman's excellent advices in his "Designing with Web Standards" book (see our books page for details) we have implemented an access key to skip navigation and go diretly to content area. This concept could be extended of course...

# Demo and Test Setup Guide

## Introduction

This document describes an initial setup process and basic configuration options for the Open For Business Project. For more detail see related documents such as the OFBiz Framework Configuration Guide, the Entity Engine (database) Configuration Guide, the Service Engine Configuration Guide, and other related documents you may found at OFBiz Documentation Index If you run into trouble there are various resources available to help. The first steps would be to search on the New OFBiz Docs Site and Old OFBiz Wiki (now archived), and then on the OFBiz Mailing Lists. If you can't find you answer there, then subscribe to the Apache OFBiz Users Mailing List, and send a message with as much detail as possible about the problem you are having.

## Quick & Easy Setup

You can get up and running quickly by downloading the OFBiz Complete distribution and following some simple instructions. For more options and explanations, see the rest of this document.

1. Download and install the Java 2 v1.5 series JDK/J2SDK (not the JRE, you need the full SDK) from Sun's Java (J2SE) site, and make sure your JAVA_HOME environment variable is set to this JDK after installation (NOTE that for Mac OS X no JVM setup is needed, just make sure Java is up to date with the OS X Software Update facility)
2. Download the OFBiz release archive and unzip it in the directory of your choice (see comments below about that, so for now checking out of SVN repository is preferred, see below...). This should create one sub-directory: **ofbiz**. This will be the OFBIZ_HOME location.
3. Start OFBiz with embedded Tomcat by going into the **ofbiz** directory and then running **"startofbiz.bat"** (or "%JAVA_HOME%\bin\java -jar ofbiz.jar") for Windows, or **"./startofbiz.sh"**(or "$JAVA_HOME/bin/java -jar ofbiz.jar") for Linux/Unix. For OS X you can just run "java -jar ofbiz.jar" and you don't need to setup the JAVA_HOME or anything because it is already there.
4. Open a browser and go to http://127.0.0.1:8080/ecommerce/control/main for the ecommerce application or https://127.0.0.1:8443/webtools/control/main for the WebTools application or https://127.0.0.1:8443/catalog/control/main for the Catalog Manager application.
5. The default administrative account is username: "admin", password: "ofbiz".
6. Have fun with it! You are running on a Java database. For more discussion of databases, read the section below on that topic.
7. For more detailed options and configuration information, read on!

## Building From SVN

When building from SVN you will need to have a Java 1.5 series J2SDK (NOT just the JRE, need to full SDK) as mentioned above. The build is done using Ant, and sufficient Ant libraries are included with OFBiz. If you have Ant installed separately just make sure you have version 1.5 or later, and then run Ant as normal intead of as listed in the following examples.
In the directory where you want OFBiz to be, do a SVN checkout of the ofbiz trunk. For example:
svn co http://svn.apache.org/repos/asf/ofbiz/trunk ofbiz
For information on connecting to SVN click here.
Now go into the "ofbiz" directory and run **"ant.bat"** (Windows), or **"./ant"** (Linux/Unix/OSX). It will compile all modules and leave you an executable jar (ofbiz.jar) in the "ofbiz" directory.
To load the seed and demo data, run **"ant.bat run-install"** or **"%JAVA_HOME%\bin\java -jar ofbiz.jar install"** (Windows), or **"./ant run-install"** or*"$JAVA_HOME/bin/java -jar ofbiz.jar install"* (Linux/Unix/OSX)
As an alternative to the previous step: to load the seed data only, run **"ant.bat run-install-seed"** or **"%JAVA_HOME%\bin\java -jar ofbiz.jar install -readers=seed"** (Windows), or **"./ant run-install-seed"** or*"$JAVA_HOME/bin/java -jar ofbiz.jar install -readers=seed"* (Linux/Unix/OSX)

To start the server run **"ant.bat run"** or **"%JAVA_HOME%\bin\java -jar ofbiz.jar"** (Windows), or **"./ant run"** or **"$JAVA_HOME/bin/java -jar ofbiz.jar"** (Linux/Unix/OSX)
Another build option in the Ant build script that is useful is **"ant.bat clean"** (Windows) or **"./ant clean"** (Linux/Unix/OSX). That will clean out all built classes allowing you to run "ant" again to get a clean build. If you are running into funny errors after updating from SVN in the future, give this clean build process a try first.

## Database Setup

Database setup is done in the entityengine.xml file. There are many options there which are described in the Entity Engine Configuration Guide
The OFBiz package comes with Derby, an open source Java database from IBM that complies with DB2 specs and is based on the Cloudscape product. This database is good for demonstration purposes because it is easy to setup and use. It is not the best for large data sets and does not provide the same performance or scalability that a major database would, but compared to HypersonicSQL (that we used to use) it is significantly better because while not as fast for small scale operations it is closer to a production database environment and allows us to catch issues earlier on. Smaller sites might even consider this as an option for their production deployment, especially once the database is a bit more stabilized.
There are many open source databases that will scale well and deliver good performance. The two most popular are PostgreSQL and MySQL (4.1.11 or later, or the 5 series) . Postgres is a very full featured database with transaction support, foreign keys, stored procedures, et cetera. Postgres also has very friendly license terms. MySQL is a pretty good option these days as well. Please note that if you use this in a commercial production instance you may have to purchase a commercial license because it is GPL licensed and so is the JDBC driver. MySQL AB allows use of the JDBC driver in open source projects in spite the GPL license, but this may not apply for commercial use of a modified OFBiz. For some a commercial license is the preferred way to go anyway because of support and warranty and other issues. For those with this preference considering Postgres there is also a commercial Postgres derivative called EnterpriseDB.
Commercial databases are also supported. If you have database licenses for other needs, or have major in-house familiarity with and support for a certain commercial database, then there is no reason not to take advantage of that. OFBiz has been tested with Oracle, DB2, Sybase, MS SQL Server and others and should work fine with any database that has a JDBC driver. Please note that we have experienced that in some cases the JDBC drivers included with certain databases are not fully specification compliant. The options are often to use the database-specific APIs or to get a third party driver. The database-specific code is an issue because of licensing restrictions and additional difficulty needed to keep up with them, so sometimes a third party (even a commercial one) is preferred. For example with Oracle we have had much more success with the DataDirect JDBC driver.
There is no need to run any SQL scripts to create the tables or populate them with the default data. The entity engine can create missing tables or fields when the server starts up and does so if the appropriate property is set in the entityengine.xml file. This is the file that configures the servers for the entity engine.

For the table creation routine to work properly, the field types must be set up. Do this by specifying the corresponding fieldtypeXXX.xml (where XXX is the database name) file for the server in the entityengine.xml file. These fieldtypeXXX.xml files are located in the **ofbiz/framework/entity/fieldtype**directory.
Default data can be loaded through the "run-install" Ant target as mentioned in the Building from SVN section.

## J2EE Containers

OFBiz comes and runs by default with Tomcat for a Servlet/JSP container, the Apache Geronimo Transaction Manager for a transaction (JTA) manager, and Apache DBCP for a transaction aware connection pool.
OFBiz can also be configured to run in different containers, but there may be issues with certain quirks that other containers have, especially with servlet containers. We have always been able to find work-arounds for these, but they also seem to keep on appearing, so that is just something to watch for.
Because of the difficulty of deploying in an external application server we have created a configuration and script template tool that takes the classpath and webapp settings from the various OFBiz files to more easily generate the files you need. For more information, see the README file in the ofbiz/framework/appservers directory. If you are looking for a good commercial J2EE app server, Orion is a good place to start, but we recommend trying out Tomcat and Geronimo TM and see if they meet your needs.

# How to Setup a Company

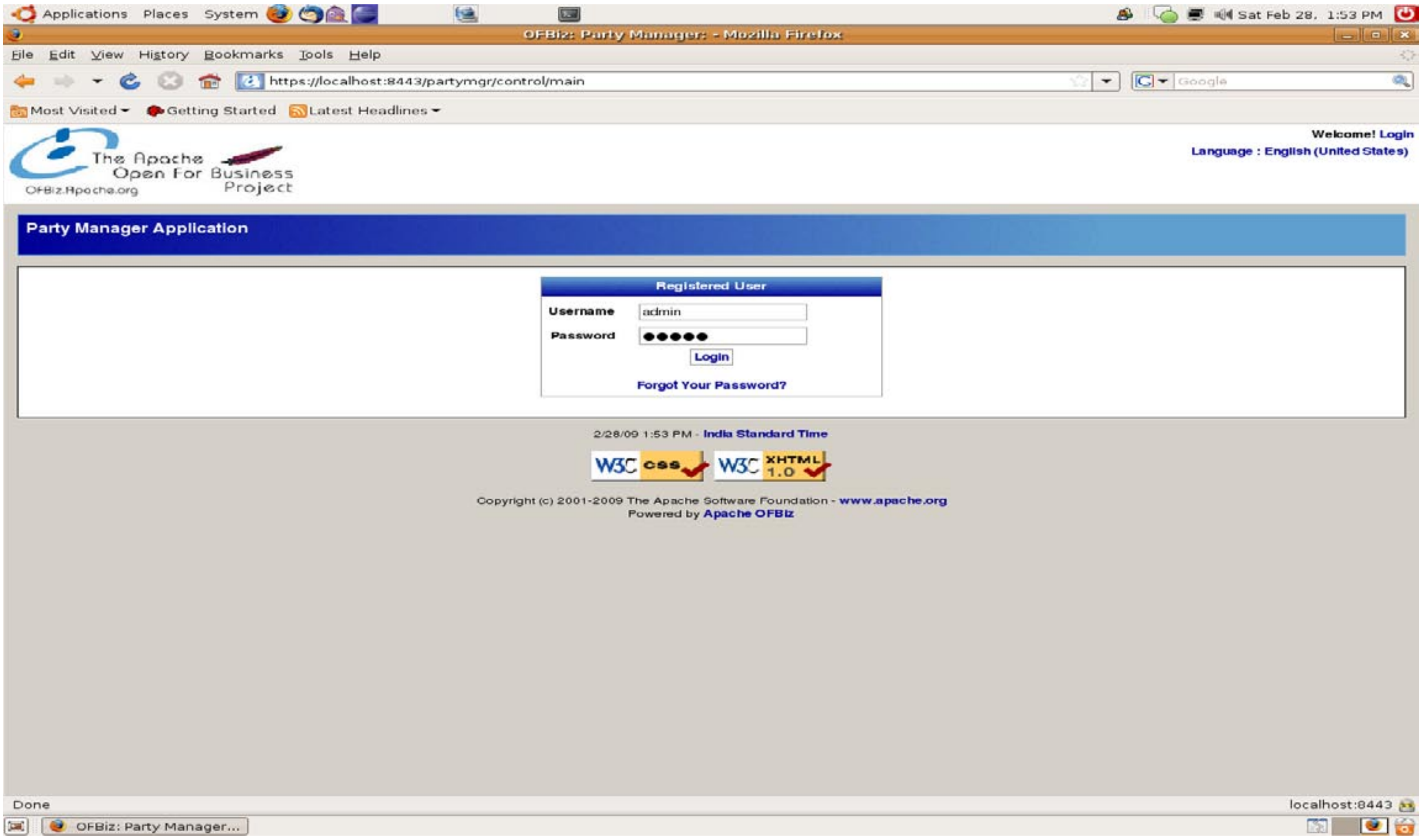
describes how to set up a company in OFbiz.

## Install Demo Data

First of all you need to install Demo data in OFbiz by running the following command **ant run-install** . After the command runs successfully all the data needed to run your application gets loaded.

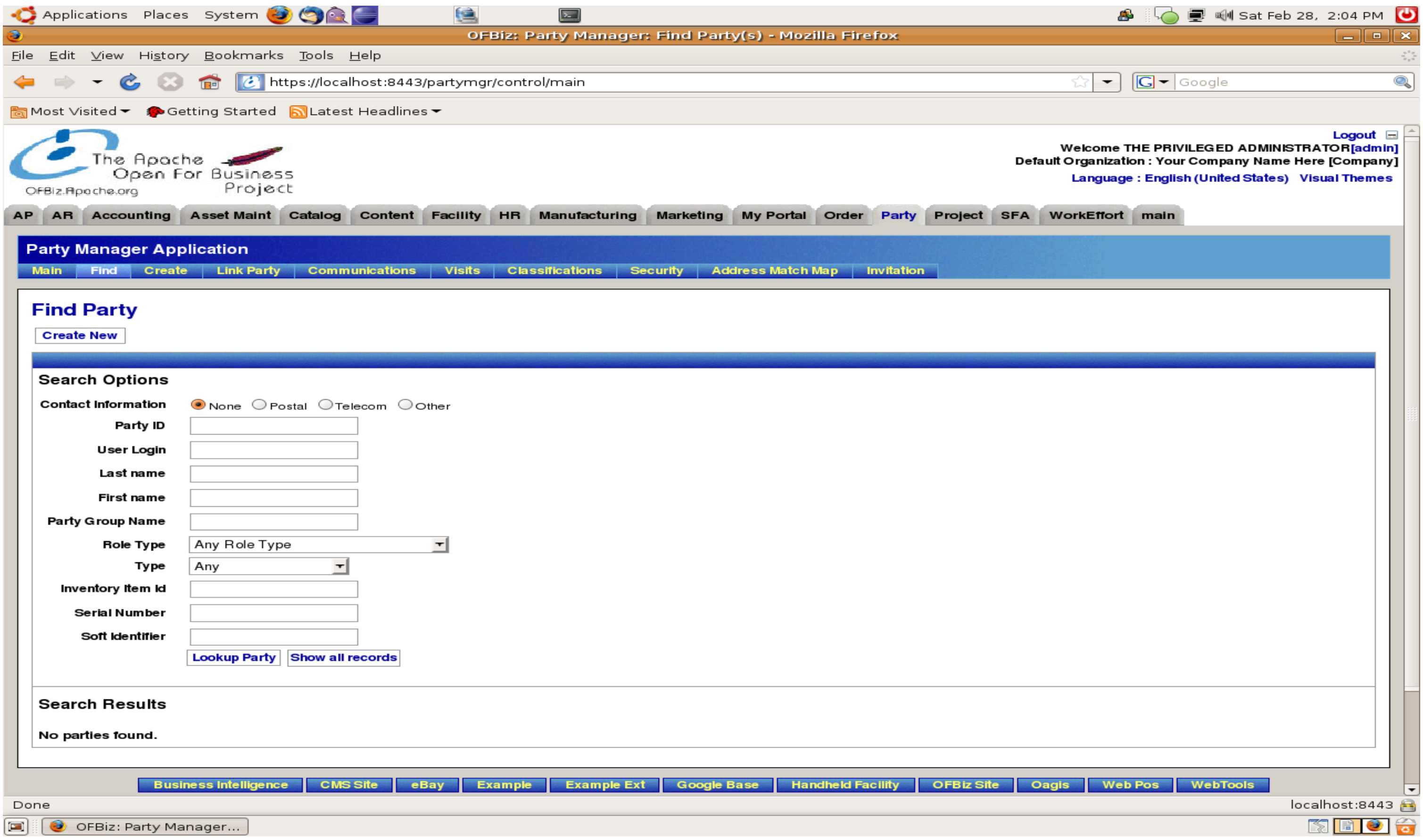
## Login into Party component

After starting server, go on to **Party** component by url [http://localhost:8080/partymgr](http://localhost:8080/partymgr) and you will be prompted with the following screen. Enter username **admin** and password **ofbiz**.

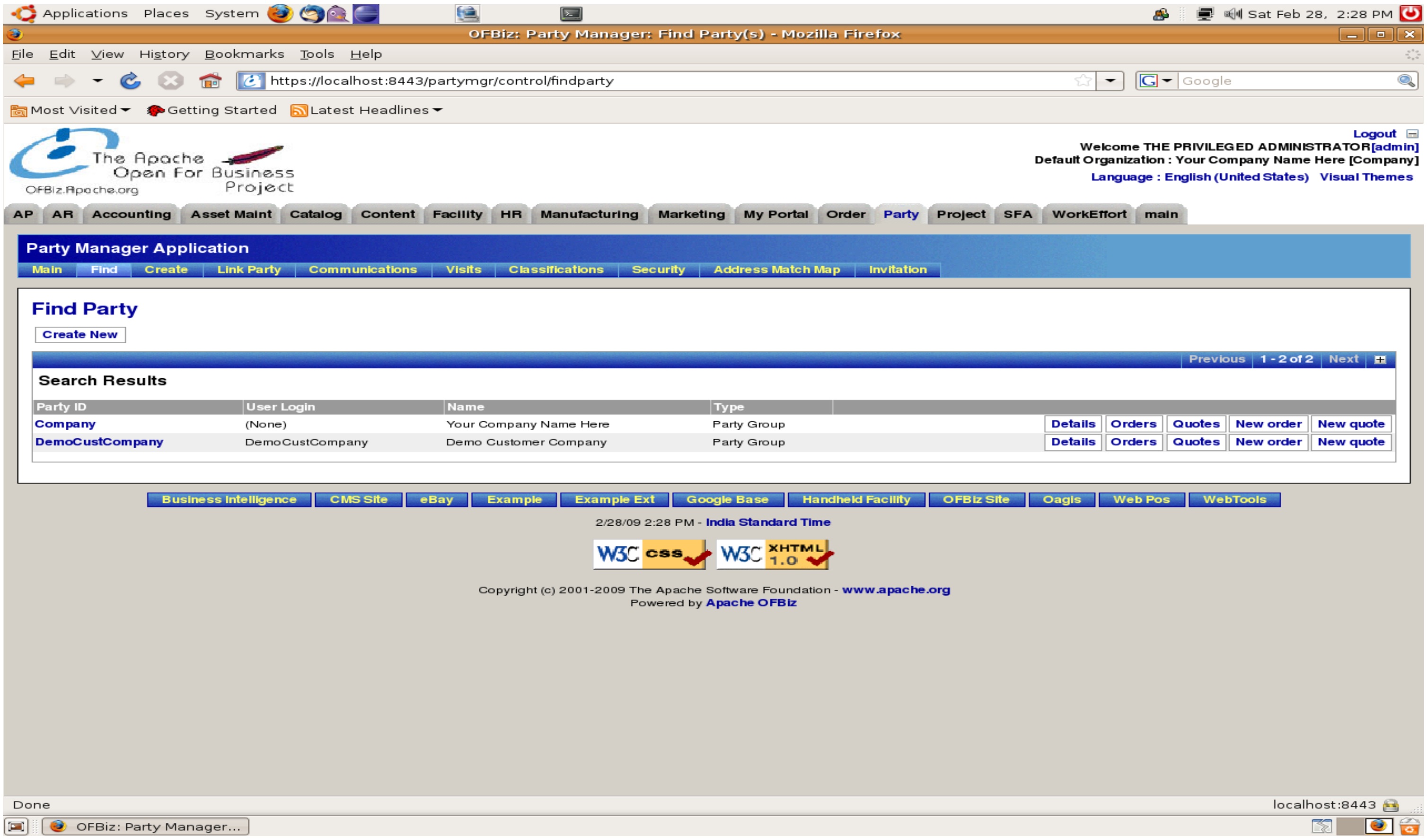



## Find party Company

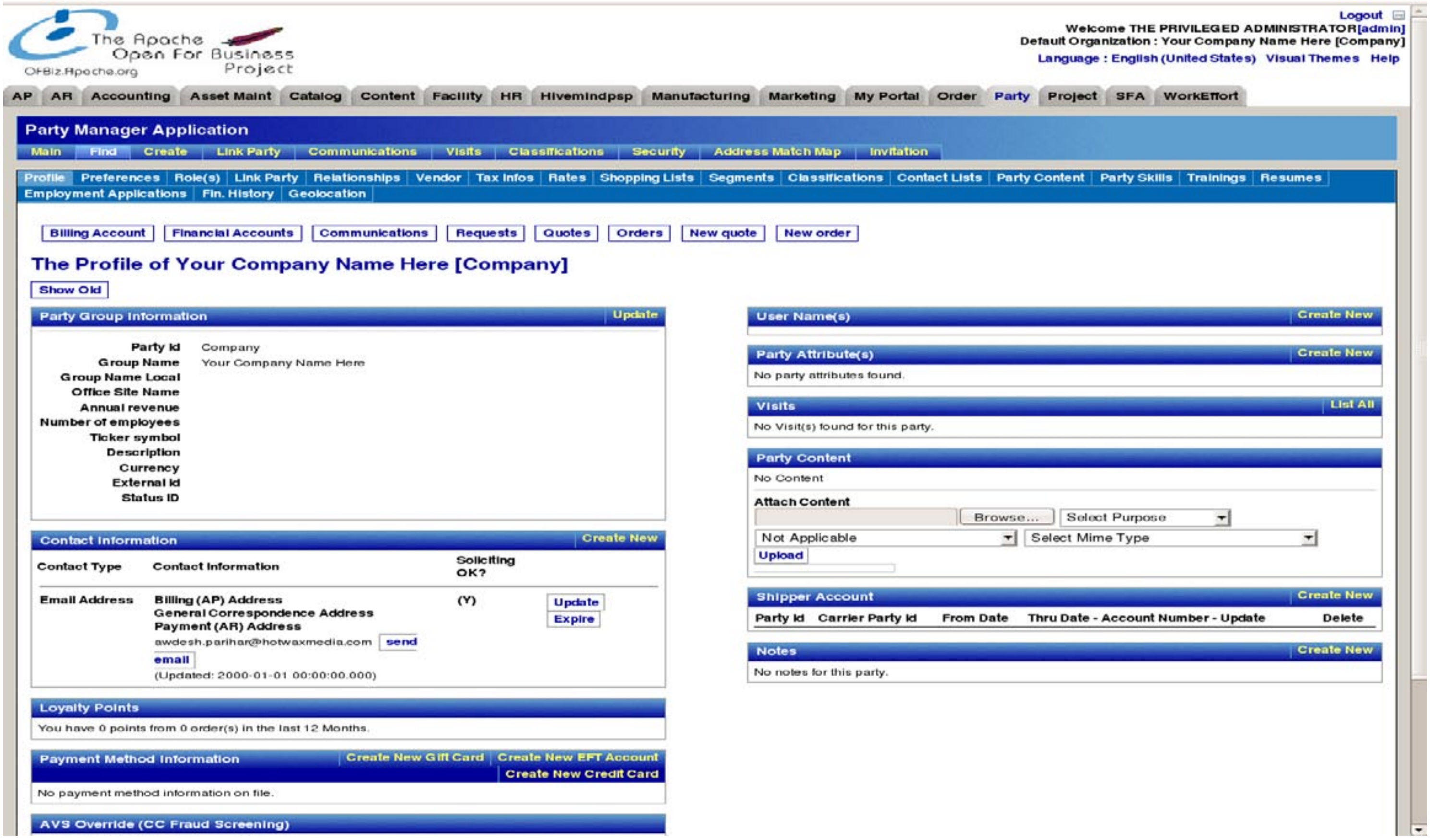
After successful login into partymgr you'll get following screen




Now type "**Company**" in the Party ID field and press enter or click on the **Lookup Party** button, following screen will be in front of you

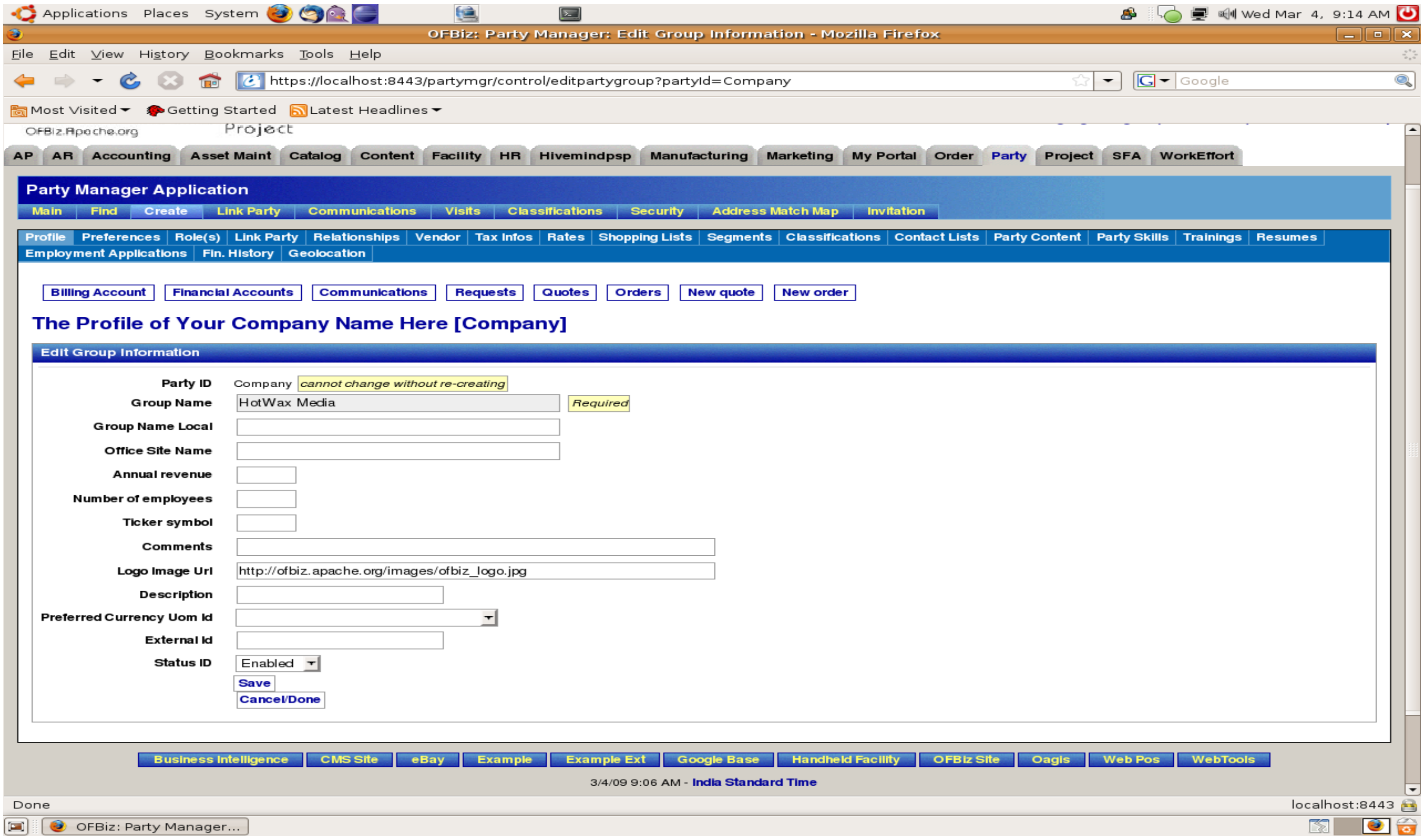



Now click on the Party ID **Company** and you will be on profile page of **Company** which is as follows:

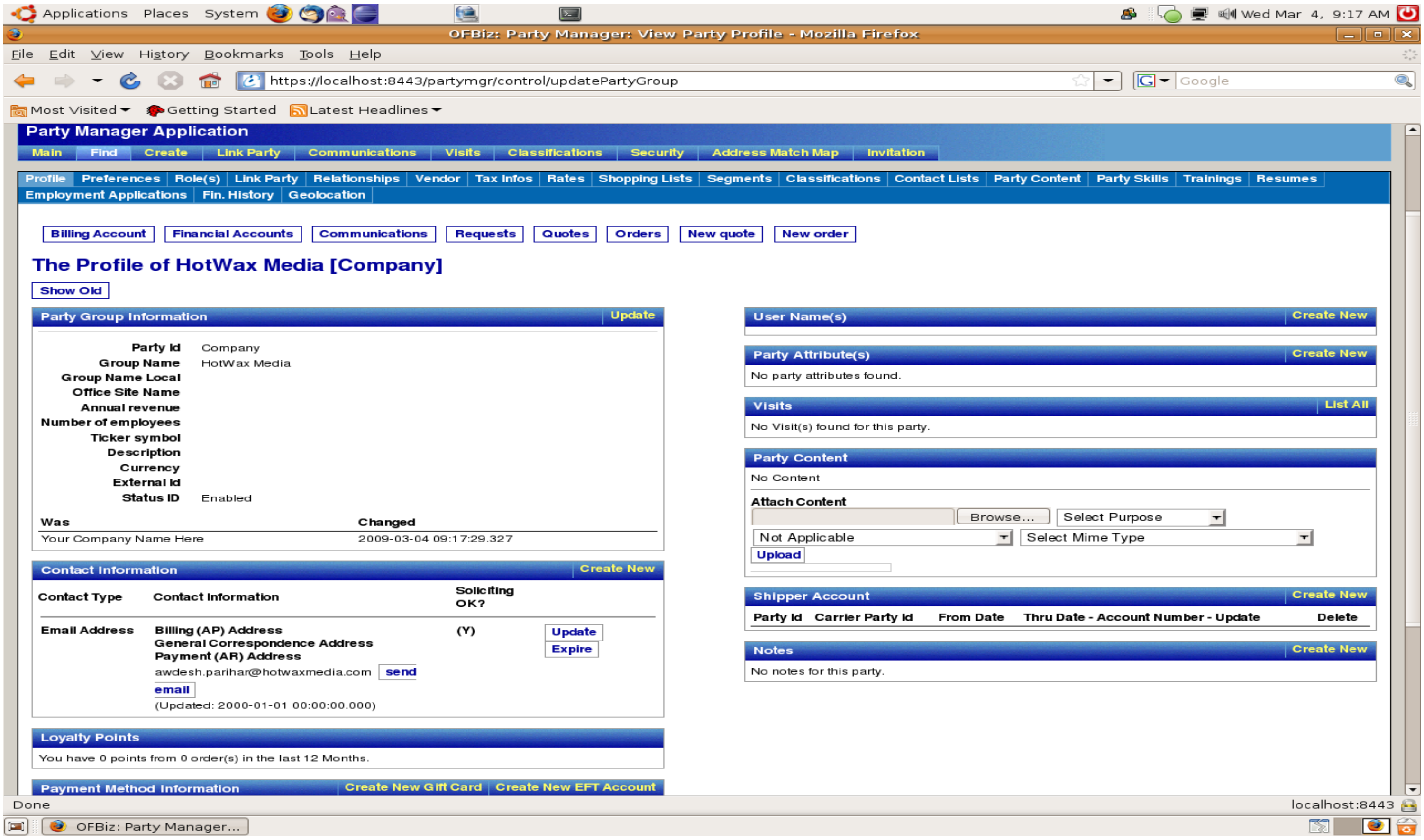



## Edit group information of Company

Now as the the profile page is in front of you; the profile for the company can be edited by using various option available here. Click on the **update** tab of the Party Group Information box to configure the profile of Party group. After Clicking on the **update** tab the following screen will be shown

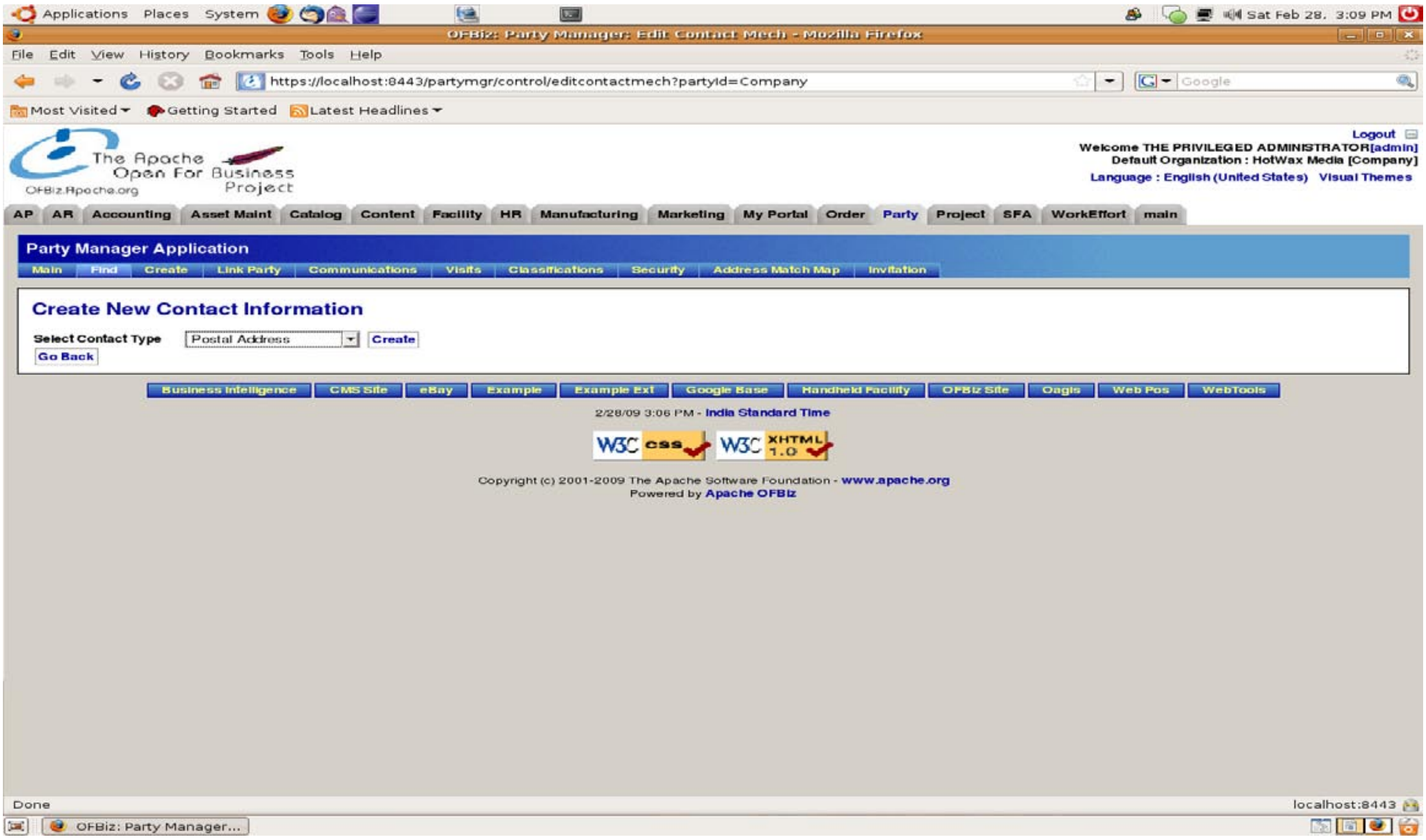



Enter the group name of the company (for instance HotWax Media as shown) and other information as your wish and then click on the **save** button. Once again you are prompted with the profile screen with the Group Name as HotWax Media.



## Create/Edit Contact Information

You can also create/edit contact information for the Party Group. For this click on the **Create New** tab of the Contact Information, and following screen will render




The Contact type may be one of the following namely:

I) Electronic Address

II) Postal address

III) Phone Number

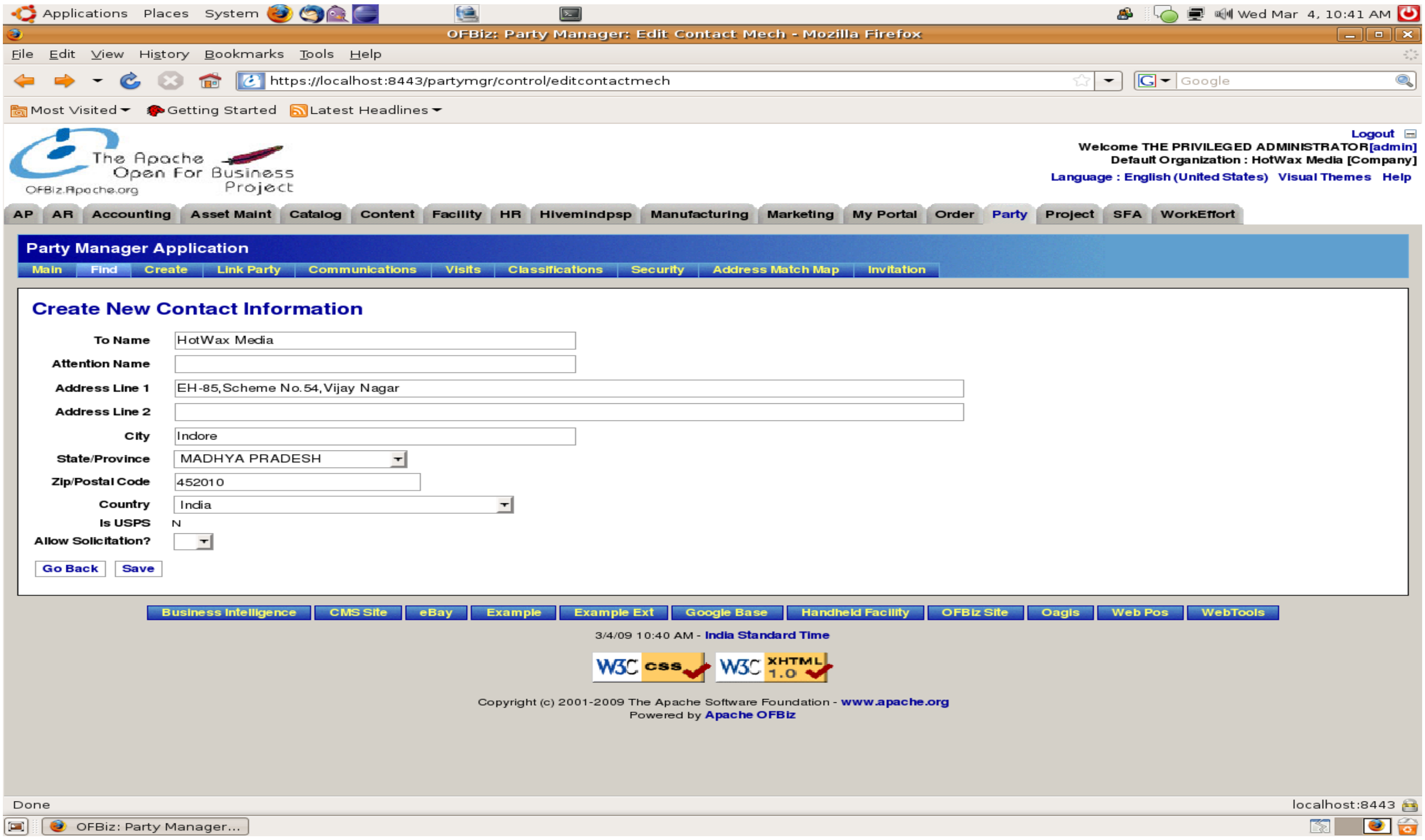
IV) Internet IP Address

V) Email Address

VI) Internet domain Name

VII) Web URL/Address

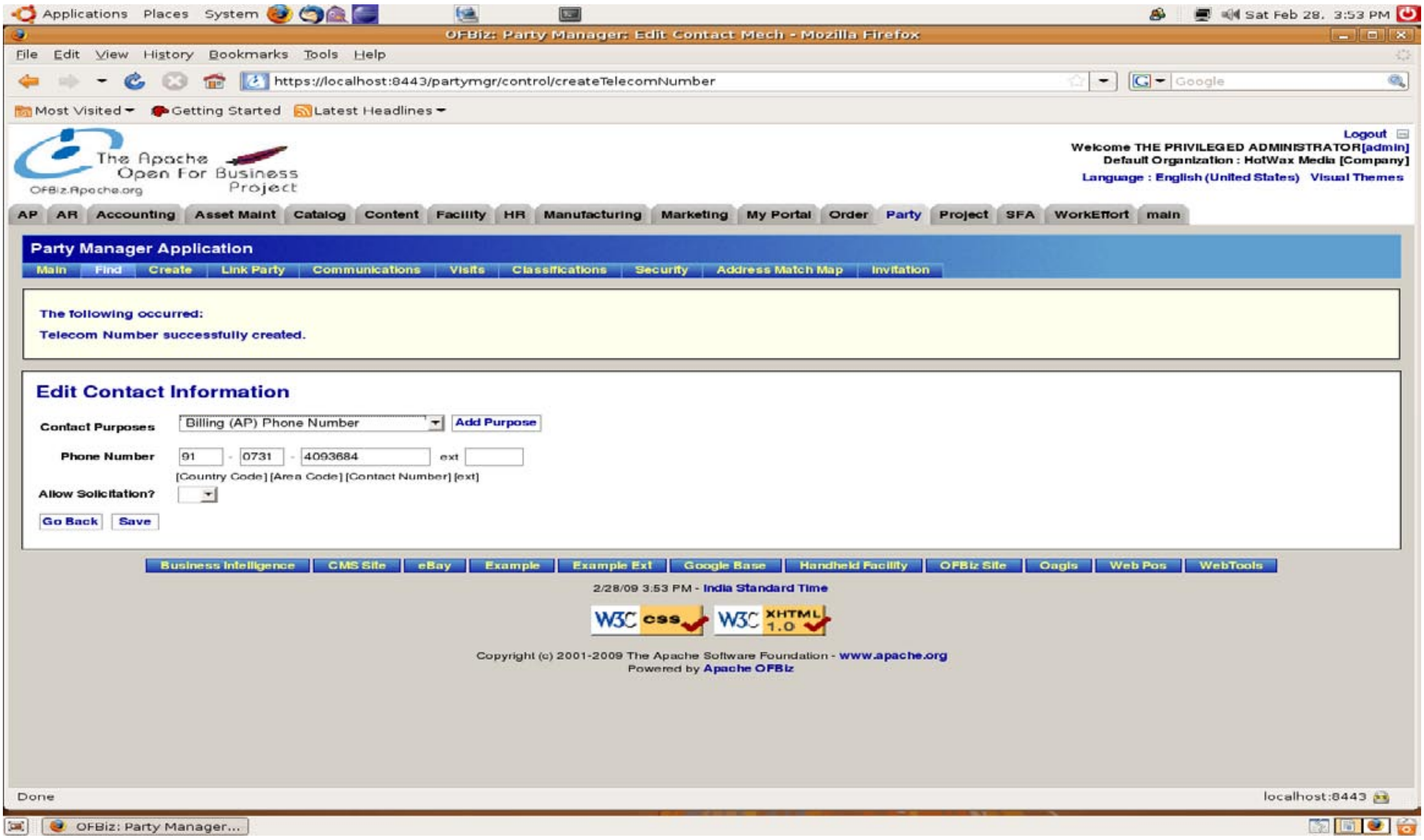
Select any one of the Contact Type from the drop down list(In this case Postal Address) and click on the **create** button and fill the appropriate information in the screen and click on **Save** button as follows




In the similar way you can create the other Contact type such as telephone number, email address of the party etc. Just click on the **Create New** tab and select any of the contact type and then follow the same steps as stated above. When you create an E-mail address or Phone Number, you can also specify the contact Purposes, i.e for which reason you are storing this phone number. The Contact Purpose may be one of the following :

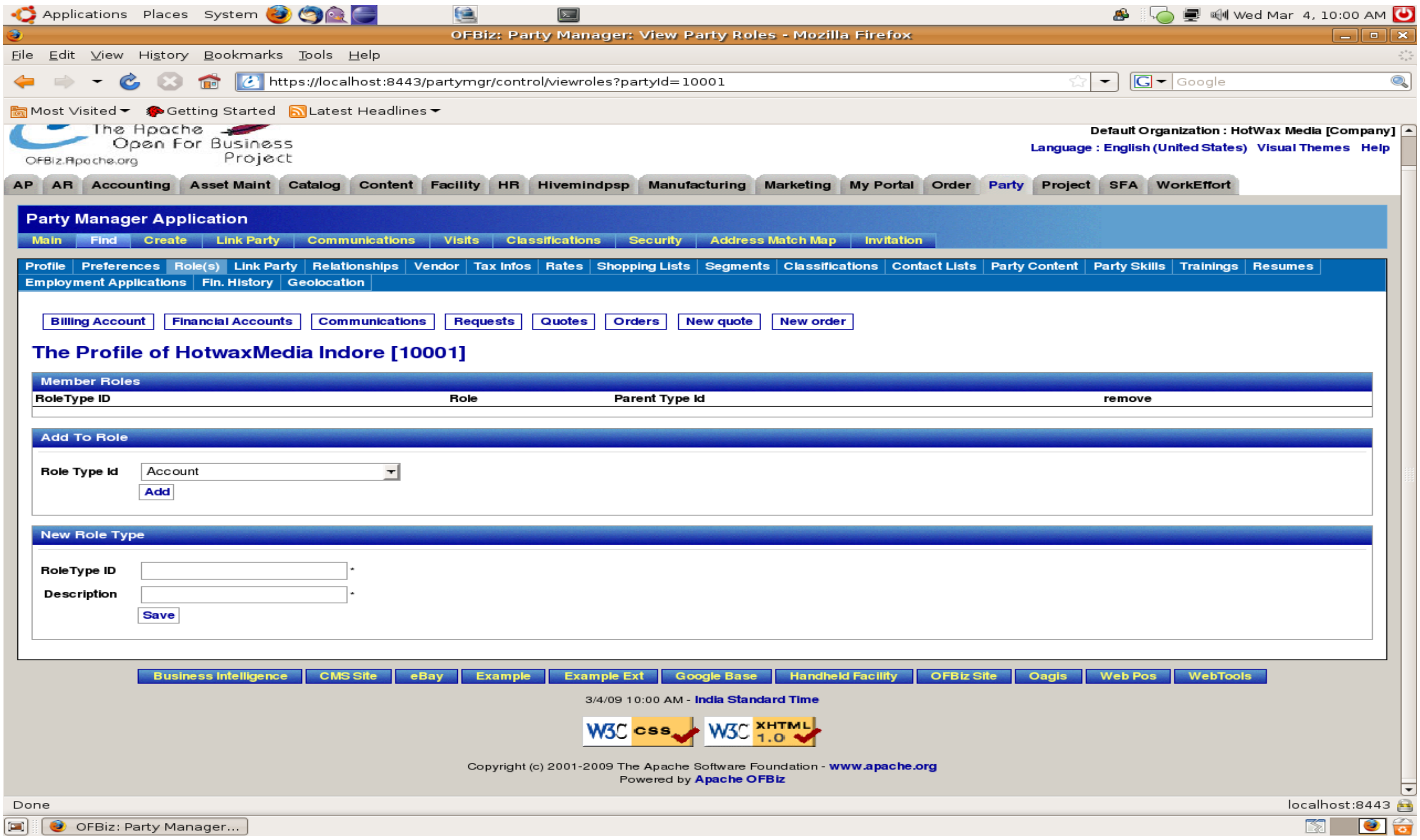
1. Billing(AP) Phone Number
2. Payment(AR) Phone Number
3. Main Fax Number
4. Shipping Destination Phone Number and so on.

Select any Contact Purpose and click on the **save** button the following screen will be in front of you.

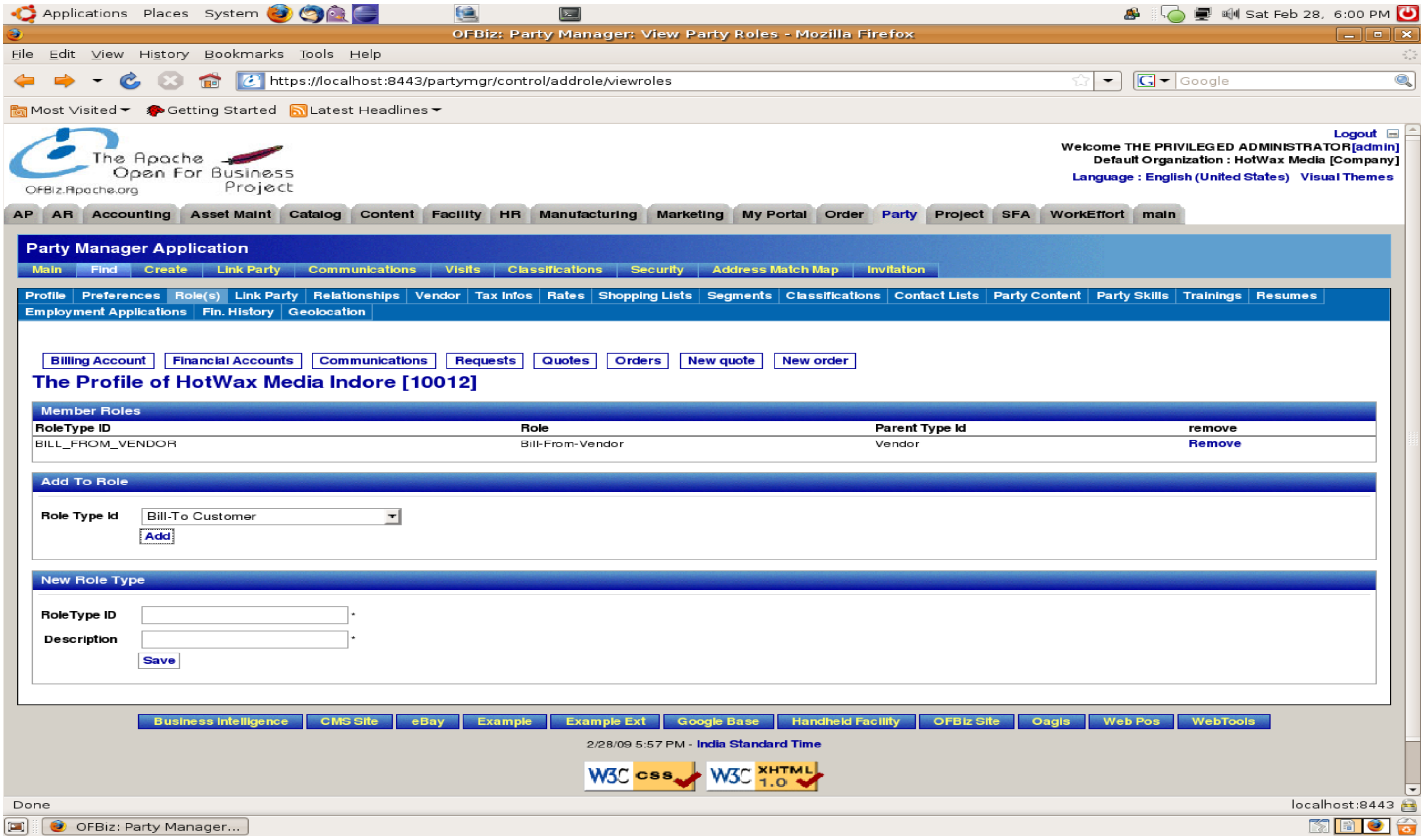



## Create/Edit Role of Company

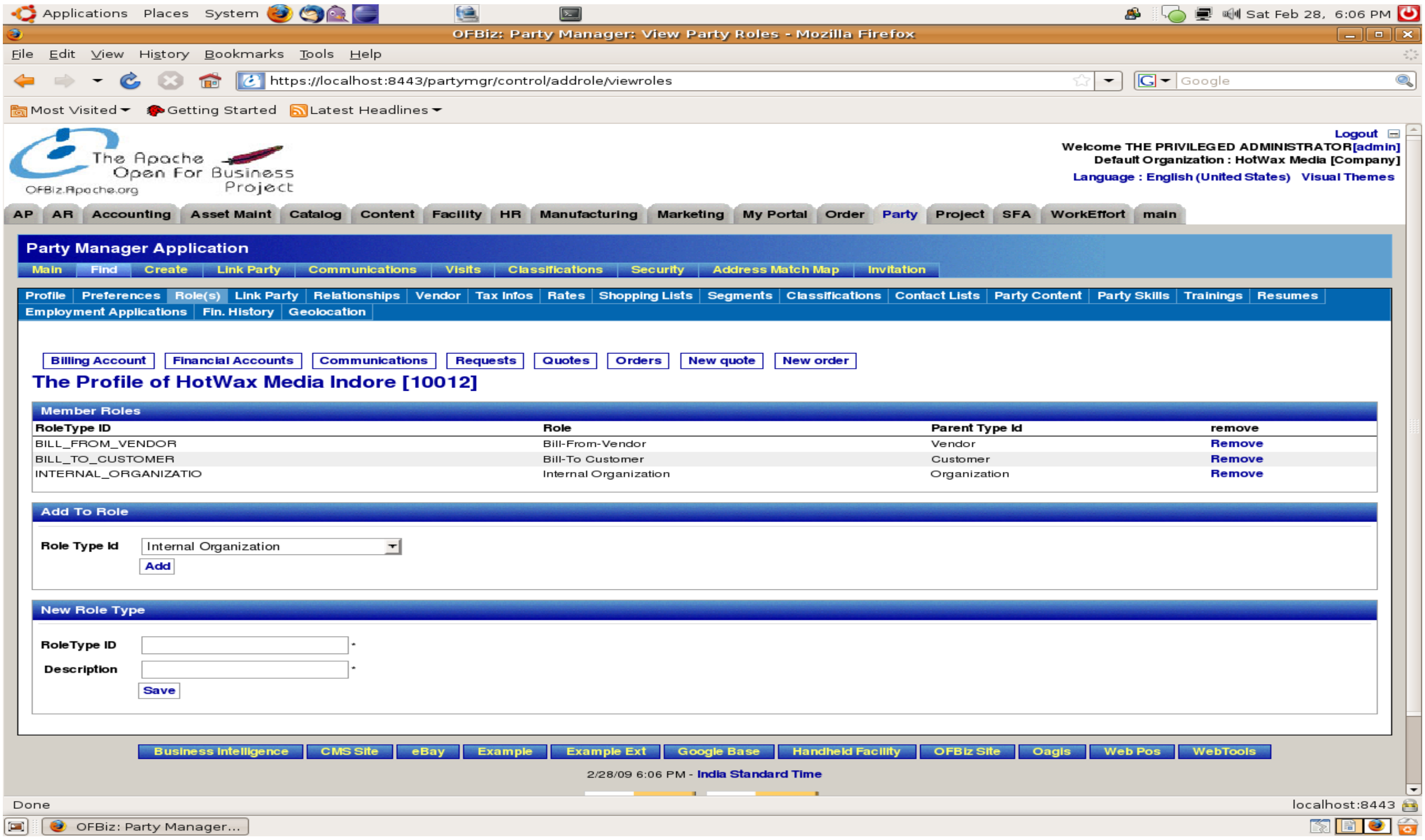
You can also create/edit role by selecting the **Role(s)** tab just below the menu bar. After clicking on the **Role(s)** tab you are prompted with the following screen.




Select any of Role Type Id ( Bill_To_Vendor in this case) from the drop down list and then click the **Add** button. The following screen will be displayed.

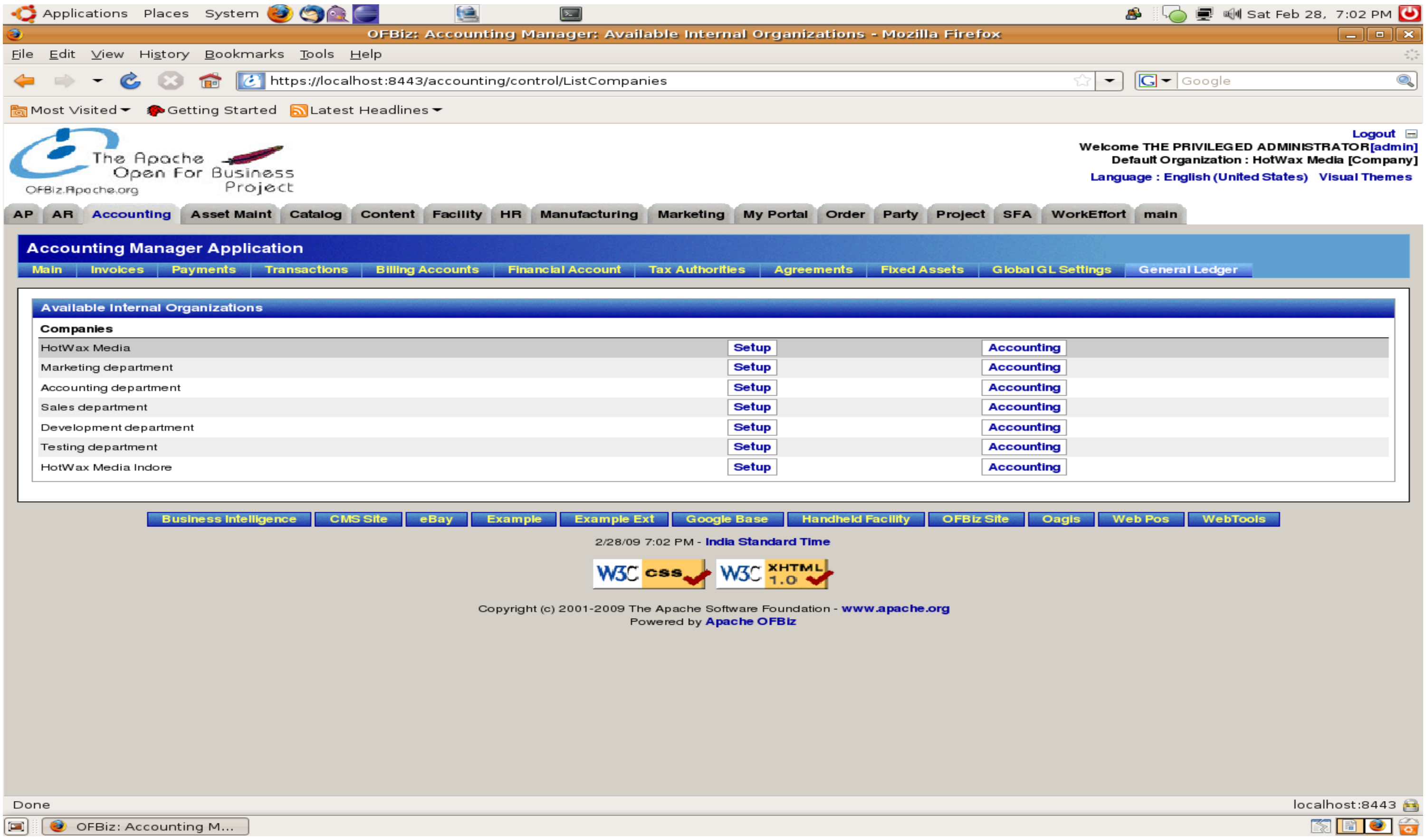



In the similar way we can also set the Party Role Type Id as Bill_From_Vendor, Internal_Organization and so on. By just selecting Role Type Id from the Dropdown list and clicking on the **Add** button. The screen will be as follows




## Set Accounting Preference

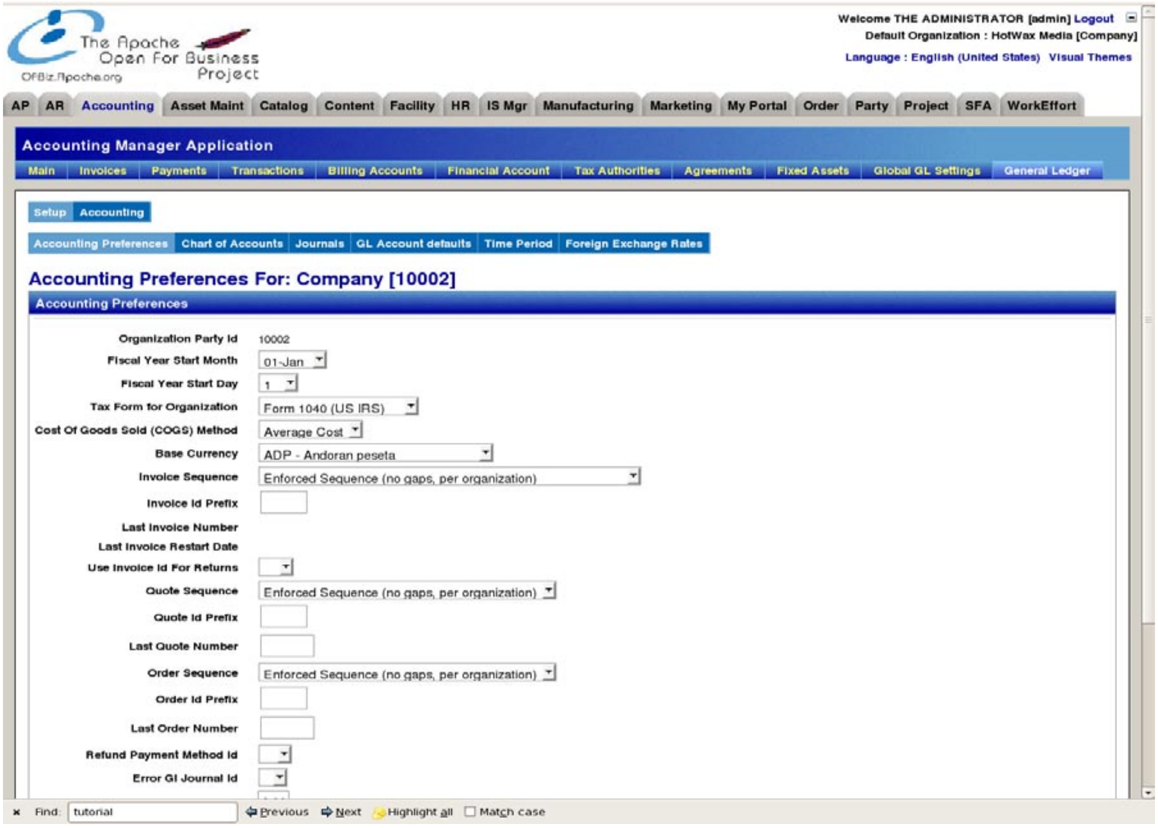
In order to set accounting preference you have to navigate to Accounting component then click on the **General Ledger** tab in the menu-bar. You will be Prompted with the following screen.



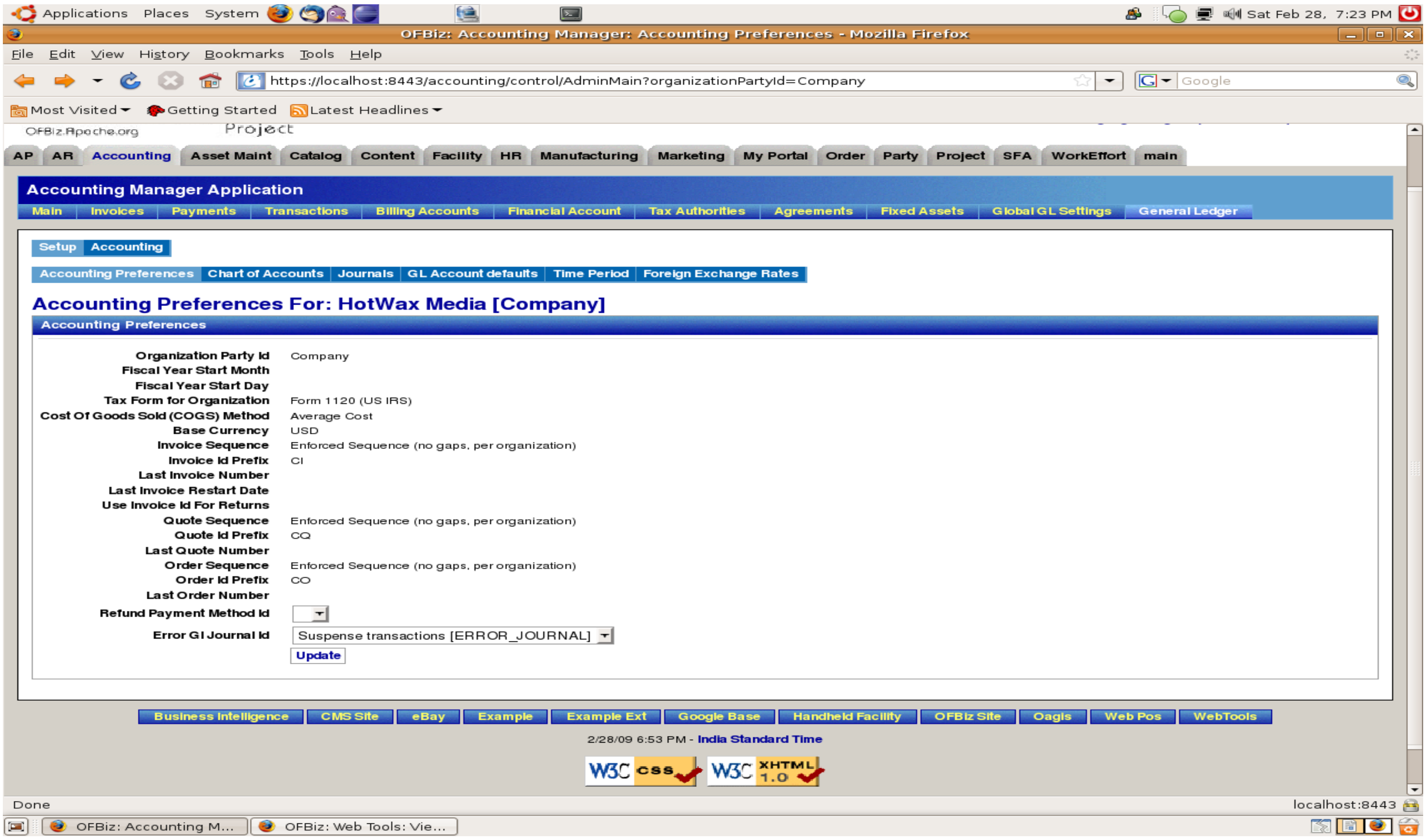

To set the accounting preference of the Party, click on the **Setup** button(in this case Hotwax Media) and edit the various information as desired as shown. Since party Hotwax Media has already been edited while creating so below screen shot is not having party Hotwaxmedia. But when you create your own company then your form will look like following form.

**Important!**

Be careful while editing accounting preference because after editing this once you'll not be able to update again since form will not be in editable mode due to some reason.




After saving the form following screen will be rendered.



So in this way you can easily setup the company in the OFbiz environment. Just click tabs, buttons and create any company according to your wish and needs.

# OFBiz-POS (Point Of Sales)

OFBiz has it's own open source POS front end application. The interface utilises XUI whilst the business functionality is directly reusing the core OFBiz technology underneath. Thus the POS terminal gains all the benefits already built into the framework around products, pricing, promotions and facilities etc.

## System options

Those familiar with OFBiz will understand most of these options as they already exist in the framework.

- Choice your Database as per OFBiz entity engine. Run one locally on the POS terminal, effectively standalone mode for resilience against network connection problems, or from another machine if you only want to maintain one database.

- Synchronise - It's possible to synchronise the POS database with an upstream central (or mid tier) database. This allows for all product administration to be done at the upstream level and synchronised down to the POS terminals. This process works the other way for reporting of sales back and customer info into the central system from the POS terminals.
- Stock management - In simple terms the main database will have visibility on the stock levels and the POS terminals can feed updates. As always the real time argument comes into effect based on how often you synchronise and even then you will still fall foul to the customer who has picked it from a shelf but not processed through the till yet scenarios!

It would be nice to see development of a stock check against other facilities screen to ease customer enquires about other shops having it in stock. Think real time stock issues again though!

## To Setup

Getting Started
POS Setup Process
Technical Production Setup Guide
Business Setup Guide
Documentation Index

## To Run

The POS alone

```
java -jar ofbiz.jar -pos
```

THe POS with also the web applications and eCommerce webstore

```
java -jar ofbiz.jar -both
```

## Getting Started:

Login with userid "1" and password "1" (or 2/2 for a non manager person).
To use the "register" it must be opened, which basically involves telling the system how much cash you are starting with. It will then keep track of cash transactions so you can see if everything balances when you close the register.

To open the register click on the MGR button on the top and near the right, and then on the "Open" button on the right side of the screen near the top.

Using Load and Save Sale buttons, you can park customer transactions for later recall. If using a central store database it allows you to pick up again from any till.

## Internationalisation (I18n)

Localisation (L10n) of POS application is straightforward, look in \applications\pos\config\.

There are 2 kinds of labels.

- Those managed by OFBiz directly : in PosUiLabels.xml
- Those managed by XUI : in XuiLabels.properties (add your language if needed)

## CRM

There is now (2009-11) a beginning of a CRM in the POS. At least you are able to search, create, modify and select a customer profile (full name, email address, phone number, card number). To allow a customer profile to be selected, it must have a card number. This card number must also correspond to an existing promotion code. Once a customer is selected, the card number is used as a promo code to give customised privileges. Also as the customer is known during the sales processing much more could be done with it...
See more about it in the Promotions chapter in the attached Till Manual.

## Synchronization

Sync Setup Notes and Example

## Tried and Tested hardware:

You may find a more complete list here. To know more about JavaPOs in general

As with any POS system the hardware can vary dramatically, but any hardware supporting JavaPOS should be able to do the trick. It would be interesting to have some idea of hardware people have tried and tested either with or without success.

| Manufacturer | Hardware/Model | OS | Comments |
|---|---|---|---|
| Epson | TM-T88III (World best seller) | Windows XP & Ubuntu 6.06 LTS | Works well but must be enabled before running POS else hang. I have added a message in the log, hope to add a message for user one of these days (Jacques Le Roux 24/5/6) |
| Zebex | Zebex 80 - USB Model | Windows XP & Ubuntu 6.06 LTS | Look for "Generic Keyboard Wedge Scanner Device" in jpos.xml. You may also have a look in ScannerKybService.java and, in Scanner.java, processScanData has also some informations. |

512MB of RAM is coming up as a recommended level, certainly going below that will cost you performance.

| Some comments pulled from the mailing list and added since |
|---|
| I found STAR (serial) receipt printers to be the best; a cash drawer which plugs into the back of the printer works great. As for scanners, use a keyboard wedge scanner and a keyboard or USB MSR. The POS devices we used had MSR built in, not exactly sure how it was configured, but in the end it send the signal through the keyboard device. A term pole |

| |
|---|
| display will need to be implemented, as this is not currently supported. However, it shouldn't be very difficult which the base which is there today. Touch screen is configured on the OS level. ELO based devices work on Linux. |
| The multiple drawers can be thru the serial. most are thru the parallel port. Gets tricky if you have a parallel device as well. Touch screens can use the keyboard wedge as well. |
| The model we used for testing was a DigiCom iPOS435 with a side-mounted MSR. Our particular units had Celeron 850MHz processors and 512MB of RAM. Performance was adequate, but I don't think I could call it "fast". (OS - Gentoo, Fedora; DB - postgres). You may want to compare the ipos430 spec to whatever you're looking at currently. Aside from the speed, it is a very nice unit. For printers we used a basic Star Micronics thermal (model TSP600), which worked out just fine during testing, though I can't comment on long-term reliability. |
| Beware with wedge scanners not self-powered. I had a problem with a Dell Dimension 4600 (too weak keyboard alimentation I think) and a Zebex 3080. No problem with the USB model. |
| I've used Metrologic scanners (tabletop & handheld) almost exclusively for the past 5 years with a variety of Dell's and custom built machines. I've never had a problem with the keyboard wedge versions. They all had their own power source. |
| Deployed OK on FC3-XFC4 with a Star TSP600 printer using serial, MetroLogic keyboard wedge scanner and MultiQ 156 serial touch screen using mutouch drivers. Cash draw linked into the printer and operates fine. No MSR requirements so not tested. |
| **How to use a MSR for CC payments.**<br>Program your MSR to work as a keyboard, not a human interface device (HID) if you can. Change the device from NullMSR (I think) to GenericMSR in framework/base/pos-configuration.xml. Use the device in specialpurpose/pos/config/jpos.xml.<br>The payment services can be set under Catalog -> Store payments |
| **Mag Stripe Readers issue on Windows XP.**<br>Using both an ID Tech USB MSR using ID Tech's JavaPOS driver and a Magtek USB device with the GenericMSR driver a problem appears on Windows XP. While it was working properly on other platforms, on WinXP it seems the data isn't getting captured and waiting when paymentEvents.payCredit is run. When installed on Windows they show up as HID's and Keyboard's in the Windows Device Manager. The problem was solved by increasing MaxWaitKeyboard in jpos.properties. The complete string from the MSR wasn't received in a single event so the logic wasn't recognizing it as an MSR swipe. |

## How to setup the Epson JavaPOS ?

To find the last available Epson JavaPOS ADK use www.epson-pos.com (we can't put it here : restrictive licence)

to install JavaPOS 1.9.x

Here I want to explain a little about how to setup the Epson JavaPOS ADK for TM printer:
On WindowsXP, and I believe the process on Linux is similiar

1. Install the JavaSE which version you like. I use jdk1.5.0_09;
2. Then installed the "Epson JavaPOS ADK 1.82" (or 1.81, 1.80, any version suppor jpos18-control; and copy the "epsonJposService182.jar, epsonJposServiceCommon.jar" to **/ofbiz/applications/pos/lib;**

        a. NOTE:
            i. Epson JavaPOS program will also install the Jars in JavaHome/jre/lib/ext so if you get confiicts look there and resolve the driver versions. like jpos111.jar and in the ofbiz like you might have jpos182.jar
            ii. if you are running more than one instance of ofbiz then it is best to have the drivers just in Ofbiz, so remove the SetupPOS.properties as well

3. Now modified the jpos.xml file, under **/ofbiz/applications/pos/config; I** post a sample here:
   It uses a TM-U220D on COM1 port, please remember to keep the jpos182 or 180 same as the file you using under ./pos/lib;

```
<JposEntry logicalName="TM-U220D">
<creation factoryClass="jp.co.epson.jpos182.util.EpsonJposServiceInstanceFactory"
serviceClass="jp.co.epson.jpos182.ptr.U220D"/>
<vendor name="SEIKO EPSON" url="http://www.epson.co.jp"/>
<jpos category="POSPrinter" version="1.8"/>
<product description="EPSON TM-U220D Printer Device Service"
name="EPSON Services for JavaPOS(TM) Standard" url="http://www.epson.co.jp"/>
<!--Other non JavaPOS required property (mostly vendor properties and bus specific properties i.e. RS232 )-->
<prop name="dataBits" type="String" value="8"/>
<prop name="Parity" type="String" value="0"/>
<prop name="portName" type="String" value="COM1"/>
<prop name="U375Compatible" type="String" value="0"/>
<prop name="deviceBus" type="String" value="RS232"/>
<prop name="DataLen" type="String" value="1"/>
<prop name="UsedJAI" type="String" value="0"/>
<prop name="TimeoutTime" type="String" value="5000"/>
<prop name="baudRate" type="String" value="9600"/>
<prop name="TwoColor" type="String" value="0"/>
<prop name="PortType" type="String" value="0"/>
<prop name="UsedNVRAM" type="String" value="0"/>
<prop name="StopBit" type="String" value="1"/>
<prop name="RetryTime" type="String" value="100"/>
<prop name="ErrorOption" type="String" value="1"/>
<prop name="ReverseEject" type="String" value="0"/>
<prop name="SerialPowerWaitTime" type="String" value="500"/>
<prop name="InputWait" type="String" value="1"/>
<prop name="AnalysisLevel" type="String" value="1"/>
<prop name="BufferSize" type="String" value="2"/>
<prop name="DeviceDesc" type="String" value="EPSON TM-U220D Printer"/>
<prop name="OutputLength" type="String" value="10"/>
<prop name="parity" type="String" value="None"/>
<prop name="stopBits" type="String" value="1"/>
<prop name="PortName" type="String" value="COM1"/> <!-- Windows -->
<!--prop name="PortName" type="String" value="/dev/ttyS0"/-> <!- Linux -->
<prop name="ReceiveTimeout" type="String" value="10"/>
```

<prop name="TwoByteCharacter" type="String" value="0"/>
<prop name="Page254UseCode" type="String" value="0"/>
<prop name="PhysicalDevice" type="String" value="TM-U220D"/>
<prop name="PaperSize" type="String" value="80"/>
<prop name="BaudRate" type="String" value="6"/>
<prop name="Page255UseCode" type="String" value="0"/>
<prop name="ServiceVersion" type="String" value="1.80"/>
<prop name="flowControl" type="String" value="None"/>
<prop name="FlowControl" type="String" value="1"/>
</JposEntry>

4. Install Java CommAPI 2.0: copy comm.jar and javax.comm.properties to j2se or j2re 's /lib folder. Copy the win32com.dll to /windows/system32 **(see Attachments)**
5. Modifiy the pos-containers.xml, which under /framework/base/config:
   to make the
   <property name="Receipt" value="**TM-U220D**" />
   value same as you defined in jpos.xml file.

Now launch with java -jar ofbiz.jar -pos, and enjoy it!

## Successful TCP / Ethernet Epson printer implementation

1. First, replace the modules in back of the printer
2. While the printer is unplugged from power, you must change the "reset" dip-switch (2-7) from off to on.
3. Power on the printer, and plug it into the network.
4. As per the "UB-E02 Technical Reference Guide." (get it, you'll need it) use the switch button on the Ethernet module to set the ROM back to factory defaults. This will also print a settings page afterward, and let you know the subnet / ip address that you'll need to know to configure the printer.
5. Use the Epson TMNet WINconfig utility on a Windows box (sorry! there is NO linux utility!) Set the PC on the same subnet, and set your gateway as the default IP address of the printer.
6. Change the settings of the printer (once connected) to suite your environment.
7. Add the printer to Epson JavaPOS with SetupPOS.sh using the IP address and info that you set previously.
8. Test with CheckHealth
9. Add printer to pos-containers.
10. start and test OFBIZ...You will receive the error at the bottom of the page. I think it's from something in the deviceloader that is able to check through serial and not though Ethernet! Nothing I wanted to fiddle with though, It works just fine and fast!
    FYI....DO NOT use a passthrough drawer on Ethernet printers, or customer displays. It mentioned this several times in all of the technical guides.
    ***IF YOU HAVE A CASH DRAWER CONFIGURED, AND UNPLUGGED WHILE TESTING, YOU WILL RECEIVE THE FOLLOWING ERROR*** (although it doesn't affect anything, and the application still starts)
    ---- exception report ----------------------------------------------------------
    Exception: jpos.JposException
    Message: The power supply of the device is off.
    ---- stack trace ---------------------------------------------------------------
    jpos.JposException: The power supply of the device is off.
    jp.co.epson.upos.pntr.init.AbstractPrinterInitialization.getRealtimeStatus(Unknown Source)

jp.co.epson.upos.pntr.init.AbstractPrinterInitialization.getPrinterStatus(Unknown Source)
jp.co.epson.upos.pntr.init.AbstractPrinterInitialization.getPrinterStatus(Unknown Source)
jp.co.epson.upos.pntr.init.AbstractPrinterInitialization.initializeCommon(Unknown Source)
jp.co.epson.upos.pntr.init.AbstractPrinterInitialization.initialize(Unknown Source)
jp.co.epson.upos.pntr.init.AbstractPrinterInitialization.initializeDevice(Unknown Source)
jp.co.epson.upos.drw.CashDrawerPortControl.initializePrinterInstance(Unknown Source)
jp.co.epson.upos.drw.CashDrawerPortControl.openPort(Unknown Source)
jp.co.epson.upos.drw.CommonCashDrawerService.setDeviceEnabled(Unknown Source)
jpos.BaseJposControl.setDeviceEnabled(Unknown Source)
org.ofbiz.pos.device.GenericDevice.enable(GenericDevice.java:71)
org.ofbiz.pos.device.GenericDevice.open(GenericDevice.java:46)
org.ofbiz.pos.device.DeviceLoader.load(DeviceLoader.java:165)
org.ofbiz.pos.container.JposDeviceContainer.start(JposDeviceContainer.java:50)
org.ofbiz.base.container.ContainerLoader.start(ContainerLoader.java:101)
org.ofbiz.base.start.Start.startStartLoaders(Start.java:263)
org.ofbiz.base.start.Start.startServer(Start.java:312)
org.ofbiz.base.start.Start.start(Start.java:316)
org.ofbiz.base.start.Start.main(Start.java:399)
--------------------------------------------------------------------------------

### Epson JavaPOS ADK 1.82 support these product

DM-D110 DM-D210 DM-D500 DM-Z460/DM-Z461

TM-H5000II TM-H5200 TM-H6000 TM-H6000II TM-H6000II Photo ID TM-H6000II Validation
TM-H6000II with Scanner TM-H6000III TM-J2000/TM-J2100

TM-J7000/TM-J7100 TM-J7500/TM-J7600

TM-L90 TM-P60 TM-T88II TM-T88III TM-T88IIR TM-T90
TM-U210A TM-U220 w/Black Mark Sensor TM-U220A TM-U220B TM-U220D TM-U230 TM-U950

### Advice

Never load/mix 2 instances of ADK (eg 1.8x and 1.92) on the same machine

## JavaPOS USB For EPSON TM-U220D Printer Device Service

Note: this is a template and needs to be changed if your doing this by hand.
you have to navigate the epson software
first download
Epson_JavaPOS_ADK_1112.exe
where every you install it(usually program files on windows)
look in
Epson\SetupPOS

For purpose of hanving this program modify the Jpos.xml
I put a copy of the Jpos.xml that the SetupPOS can change.

If your getting errors look down the <prop list to see if you can change it.

this is the usb config for Jpos.xml

```
    <JposEntry logicalName="POSPrinter">

        <creation
factoryClass="jp.co.epson.uposcommon.util.EpsonJposServiceInstanceFactory"
serviceClass="jp.co.epson.upos.pntr.U220DService"/>

        <vendor name="SEIKO EPSON" url="http://www.epson.com"/>

        <jpos category="POSPrinter" version="1.11"/>

        <product description="EPSON TM-U220D Printer Device Service" name="EPSON Services
for JavaPOS(TM) Standard" url="http://www.epson.com"/>


        <!--Other non JavaPOS required property (mostly vendor properties and bus specific
properties i.e. RS232 )-->

        <prop name="Halftone" type="String" value="0"/>

        <prop name="PhysicalPrinterName" type="String" value="TM-U220D"/>

        <prop name="NVRAMControlLevel" type="String" value="1"/>

        <prop name="Stamp" type="String" value="0"/>

        <prop name="OutputCompleteType" type="String" value="2"/>

        <prop name="StatusThreadInterval" type="String" value="100"/>

        <prop name="OutputTimeout" type="String" value="500"/>

        <prop name="PortType" type="String" value="2"/>

        <prop name="OutputBufferSize" type="String" value="65536"/>

        <prop name="FirmRecordLog" type="String" value="1"/>

        <prop name="UsedNVRAM" type="String" value="0"/>

        <prop name="ReceiveTimeout" type="String" value="1000"/>

        <prop name="SlpReverseEject" type="String" value="0"/>

        <prop name="PortName" type="String" value="TM-U220"/>

        <prop name="OfflineRetryIntervalTime" type="String" value="25"/>

        <prop name="DefaultSlpClampTime" type="String" value="0"/>

        <prop name="epson.trace.file" type="String" value="trace.log"/>
```

```
<prop name="AsyncProcessingSize" type="String" value="1"/>
<prop name="KanjiTwoWaysPrint" type="String" value="0"/>
<prop name="PulseStep" type="String" value="2"/>
<prop name="PortInterfaceName" type="String" value="USB"/>
<prop name="OutPipe" type="String" value="0"/>
<prop name="U375Compatible" type="String" value="0"/>
<prop name="PortNameType" type="String" value="0"/>
<prop name="preCutterFunction" type="String" value="0"/>
<prop name="epson.tracing" type="String" value="false"/>
<prop name="epson.trace.max.size" type="String" value="1000"/>
<prop name="RecPaperSize" type="String" value="76"/>
<prop name="DeviceDesc" type="String" value="EPSON TM-U220D POSPrinter"/>
<prop name="PageModeExt" type="String" value="0"/>
<prop name="SupportStatistics" type="String" value="1"/>
<prop name="OutputErrorOption" type="String" value="0"/>
<prop name="FirmProgressRange" type="String" value="10"/>
<prop name="SupportFirmware" type="String" value="0"/>
<prop name="InputTimeout" type="String" value="100"/>
<prop name="AutoPowerOff" type="String" value="0"/>
<prop name="SlpMoreColumns" type="String" value="0"/>
<prop name="RecPaperType" type="String" value="0"/>
<prop name="MemorySwitch" type="String" value="0"/>
<prop name="ReadThreadInterval" type="String" value="-1"/>
<prop name="QueuingOfflineTimeout" type="String" value="1000"/>
<prop name="TwoColor" type="String" value="1"/>
<prop name="InitializeThreadTime" type="String" value="1000"/>
<prop name="TwoByteCharacter" type="String" value="0"/>
<prop name="FirmLogFileSize" type="String" value="1000"/>
<prop name="Peeler" type="String" value="0"/>
<prop name="InPipe" type="String" value="1"/>
```

```xml
        <prop name="ConfigurationFile" type="String"
value="epson/xml/Setting/TM-U220DSetting.xml"/>
        &lt;prop name="Custom1Color" type="String" value="0xFF0000"/&gt;
        &lt;prop name="preEndorseFunction" type="String" value="0"/&gt;
        &lt;prop name="Upos.Spec_c" type="String" value="false"/&gt;
        &lt;prop name="FirmNotifyAllProgressEvents" type="String" value="0"/&gt;
        &lt;prop name="InitializeResponseTimeout" type="String" value="1000"/&gt;
        &lt;prop name="ReceiveRetryTime" type="String" value="25"/&gt;
        &lt;prop name="UsedInterCharacterSet" type="String" value="0"/&gt;
        &lt;prop name="RecMoreColumns" type="String" value="0"/&gt;
        &lt;prop name="PrinterTransmitTimeout" type="String" value="30000"/&gt;
        &lt;prop name="WriteThreadInterval" type="String" value="-1"/&gt;
        &lt;prop name="preORCBFunction" type="String" value="0"/&gt;
        &lt;prop name="RecNearEndSensor" type="String" value="1"/&gt;
        &lt;prop name="LogObject" type="String" value=""/&gt;
        &lt;prop name="Cutter" type="String" value="0"/&gt;
        &lt;prop name="PhysicalDevice" type="String" value="TM-U220D"/&gt;
        &lt;prop name="FirmLogFileName" type="String" value="Firmware.log"/&gt;
        &lt;prop name="UsedPeeler" type="String" value="0"/&gt;
        &lt;prop name="InputBufferSize" type="String" value="4096"/&gt;
        &lt;prop name="TransmitTimeout" type="String" value="5000"/&gt;
        &lt;prop name="OfflineCount" type="String" value="2"/&gt;
        &lt;prop name="TransmitRetryTime" type="String" value="100"/&gt;
        &lt;prop name="DirectIOEventTimeout" type="String" value="5000"/&gt;
&lt;/JposEntry&gt;
```

# Sync Setup Notes and Example

## Default example in OFBiz

The example in OFBiz (in specialpurpose/pos/data/PosSyncSettings.xml) is designed for a 3 levels architecture, where Per Store Servers (PSS) are used between POS terminals and the Master Central Server (MCS).
Here is a short explanation on how it works
This setting is intended to synchronise a main database (on the MCS) with the databases of local stores servers (PSS) each of them being synchronised with their local POS terminals. Each of these OFBiz instances use a database. Store here means a physical store where POS terminals are.

There are 4 types of flow :

- MCS -> PSS
- PSS -> POS
- POS -> PSS
- PSS -> MCS

Where

- MCS is a central OFBiz server (with one database, the central database where all products information are maintained and where the consolidation is done)
- PSS is an instance of a server store (with one database, the store database where all store inventory informations are stored)
- POS is an instance of a POS terminal (with one database, the POS database where terminal information are collected)
- The flow MCS -> PSS is used to update catalogs, from the central database where the main catalogs are maintained, to the stores. This include roughly pricing, promotions, basic product info, etc.
- The flow PSS -> POS is used to roughly update catalogs of the POS terminals
- The flow POS -> PSS is used to roughly update orders, payments , etc. of the store
- The flow PSS -> MCS is used to roughly update orders, payments, inventory, etc. in the main database.

This scheme is very powerful and help you to extend your net of stores has needed. Remember that this is only an example and you can extend it from your needs.

In the commented examples the MCS update the PSS, hence POS catalogs, every 2 hours. And the POS terminals update MCS database about orders every 5 minutes .

## A simple but more detailled example

The following example is based on the PosSyncSettings.xml file. It's intended to be used where POS terminals are directly connected to a Master Central Server (MCS)
Here are some explanation and step by step instructions on setting up synchronization.

## Entities used

- **EntiyGroup**
  EntityGroup and EntityGroupEntry records are only loaded on Master Central Server (MCS).
  When the "PULL" sync occurs those records are copied down to the POS terminal(s).
  This allows for changes to be made on MCS and propagate down to terminal(s).
  Both sets of EntityGroup records (5501 and 5506) are reused across terminal(s). No need to have separate EntityGroup records for each terminal.
- **EntitySync (PULL)**
  EntitySync record is loaded on MCS.
  entitySyncId must be unique for each terminal so we use the POS terminal ID.
- **EntitySync (PUSH)**
  EntitySync record is loaded on POS terminal.
  Can use the same enitySyncId since it is loaded on each terminal, not MCS.
- **RecurrenceRule, RecurrenceInfo, RuntimeData**
  Both of these sets of records are loaded on the POS terminal(s).
  This initiates PUSH and PULL transfers and these are always initiated from the terminal(s), not MCS.

## Step by Step Instructions

1. Setup POS terminal with clean checkout from trunk
2. In startofbiz.sh/bat set RMIIF to localhost (uncomment the line.)
3. Create empty ofbiz database and populate with seed data (ant run-install-seed).
   Note that for testing/learning you can load demo data as well.
   For a production environment you will need to only load seed, then do all of your organization specific setup such as accounting, facilities, stores, etc.
4. framework/service/config/serviceengine.xml - enity-sync-rmi set to MCS.
5. Start POS instance(s) (the OFBiz instance(s) which runs the POS, aka POS terminal(s)) in standard mode (web interface)
6. Load EntitySync record for PULL on MCS instance (the OFBiz instance which runs the MCS)
7. Load XML data you want to setup on POS instance to trigger PULL sync
8. Load EntitySync PUSH on POS instance(s).
9. When pull is finished, load XML data you want to setup to trigger PUSH
10. Shutdown POS instance(s)
11. pos-containers.xml on POS instance(s) - set xui session id = <facilityId-pos terminal number> ex. 10020-1.
12. pos-containers.xml on POS instance(s) - set faclility ID = <facilityId) ex. 10020.
13. Don't forget to change entityengine.xml on all POS instance(s) to include a prefix for record id's.
    Otherwise you will get record id conflicts when instance(s) push records to the MCS.
    This is done by adding the "sequenced-id-prefix" attribute to the default delegator. For example:
14. `<delegator name="default" entity-model-reader="main" entity-group-reader="main" entity-eca-reader="main"`
15. `    distributed-cache-clear-enabled="false"  sequenced-id-prefix="10020-1">`

16. <group-map group-name="org.ofbiz" datasource-name="localpostgres"/>
17. <group-map group-name="org.ofbiz.olap" datasource-name="localpostgres"/>
18. </delegator>
19. Add PosTerminal record to MCS database.
    You must create a PosTerminal record for each POS instance you need to synchronize with MCS.
    Once this record is added you can start your POS instance and attempt a synchronization.
20. Start your POS instance in rich client mode. (add -pos after ofbiz.jar in startup file.)

## Special note on facilityId and terminal numbers.

The facilityId is generated automatically when facilities are created.
The terminal number must be unique so for our implementation we used <facilityId-1,2,n> as a convention for identifying terminals.
This is not required. Use whatever convention suits your purpose.
We also used this number as the prefix in entityengine.xml but it makes record id's rather long.

```
<entity-engine-xml>


<!-- MCS->POS Per Store Server to POS Terminal
     This data is loaded on the Master Central Server -->
    <EntityGroup entityGroupId="5501" entityGroupName="POS: Per Store Server to POS Terminal"/>

    <!-- these are used to update sync settings on the POS terminals from the central server -->

    <EntityGroupEntry entityGroupId="5501" entityOrPackage="org.ofbiz.entity.group" applEnumId="ESIA_INCLUDE"/>

    <!-- this is the general product information needed for pricing, promotions, basic product info, etc -->

    <EntityGroupEntry entityGroupId="5501" entityOrPackage="org.ofbiz.product.product" applEnumId="ESIA_INCLUDE"/>


    <EntityGroupEntry entityGroupId="5501" entityOrPackage="org.ofbiz.product.price" applEnumId="ESIA_INCLUDE"/>

    <EntityGroupEntry entityGroupId="5501" entityOrPackage="org.ofbiz.product.promo" applEnumId="ESIA_INCLUDE"/>

    <!-- org.ofbiz.product.category is needed for certain promotions, probably won't be used much for category browsing in the POS -->
```

```xml
    <EntityGroupEntry entityGroupId="5501" entityOrPackage="org.ofbiz.product.category" applEnumId="ESIA_INCLUDE"/>

    <!-- org.ofbiz.party.party may be needed for certain promotions -->

    <EntityGroupEntry entityGroupId="5501" entityOrPackage="org.ofbiz.party.party" applEnumId="ESIA_INCLUDE"/>

    <EntityGroupEntry entityGroupId="5501" entityOrPackage="org.ofbiz.pos.PosTerminal" applEnumId="ESIA_INCLUDE"/>

    <EntityGroupEntry entityGroupId="5501" entityOrPackage="org.ofbiz.product.storage" applEnumId="ESIA_INCLUDE"/>

    <EntityGroupEntry entityGroupId="5501" entityOrPackage="org.ofbiz.product.store" applEnumId="ESIA_INCLUDE"/>

    <EntityGroupEntry entityGroupId="5501" entityOrPackage="org.ofbiz.accounting.tax" applEnumId="ESIA_INCLUDE"/>

    <EntityGroupEntry entityGroupId="5501" entityOrPackage="org.ofbiz.security.login" applEnumId="ESIA_INCLUDE"/>

    <EntityGroupEntry entityGroupId="5501" entityOrPackage="org.ofbiz.security.securitygroup" applEnumId="ESIA_INCLUDE"/>

    <EntityGroupEntry entityGroupId="5501" entityOrPackage="org.ofbiz.party.contact" applEnumId="ESIA_INCLUDE"/>

    <EntityGroupEntry entityGroupId="5501" entityOrPackage="org.ofbiz.product.inventory" applEnumId="ESIA_INCLUDE"/>


<!-- POS->MCS Per Store Server to Central Server -->

    <EntityGroup entityGroupId="5506" entityGroupName="POS: Per Store Server to Central Server"/>

    <!-- org.ofbiz.party.party may be needed for order related information, like party roles or contact info etc -->

    <EntityGroupEntry entityGroupId="5506" entityOrPackage="org.ofbiz.party.party" applEnumId="ESIA_INCLUDE"/>

    <EntityGroupEntry entityGroupId="5506" entityOrPackage="org.ofbiz.party.contact" applEnumId="ESIA_INCLUDE"/>

    <!-- all order and related information, including payment, etc info -->

    <EntityGroupEntry entityGroupId="5506" entityOrPackage="org.ofbiz.order" applEnumId="ESIA_INCLUDE"/>
```

```xml
    <EntityGroupEntry entityGroupId="5506" entityOrPackage="org.ofbiz.accounting.invoice" applEnumId="ESIA_INCLUDE"/>

    <EntityGroupEntry entityGroupId="5506" entityOrPackage="org.ofbiz.accounting.payment" applEnumId="ESIA_INCLUDE"/>

    <!-- include inventory and issuance info -->

    <EntityGroupEntry entityGroupId="5506" entityOrPackage="org.ofbiz.shipment.issuance" applEnumId="ESIA_INCLUDE"/>

    <EntityGroupEntry entityGroupId="5506" entityOrPackage="org.ofbiz.product.inventory" applEnumId="ESIA_INCLUDE"/>

    <EntityGroupEntry entityGroupId="5506" entityOrPackage="org.ofbiz.pos.PosTerminalLog" applEnumId="ESIA_INCLUDE"/>

    <EntityGroupEntry entityGroupId="5506" entityOrPackage="org.ofbiz.pos.PosTerminalState" applEnumId="ESIA_INCLUDE"/>

    <!-- include POS transactions -->

    <EntityGroupEntry entityGroupId="5506" entityOrPackage="org.ofbiz.pos.PosTerminalInternTx" applEnumId="ESIA_INCLUDE"/>



<!-- Some examples of EntitySync settings for pulling and pushing data around -->

    <!-- POS example meant to be used for pushing data from POS to MCS -->

    <EntitySync entitySyncId="POSPUSH" runStatusId="ESR_NOT_STARTED" syncSplitMillis="600000" targetServiceName="remoteStoreEntitySyncDataRmi"

            keepRemoveInfoHours="24" forPushOnly="Y"/>

    <EntitySyncIncludeGroup entitySyncId="POSPUSH" entityGroupId="5506"/>


        <!-- POS example meant to be used for pulling data from MCS to POS -->

    <!-- NOTE: for pulling setup the EntitySync record lives on the server the data is pulled from and should ONLY BE USED FOR ONE CLIENT! -->

    <EntitySync entitySyncId="<POS Terminal ID>" runStatusId="ESR_NOT_STARTED" syncSplitMillis="600000"

            keepRemoveInfoHours="24" forPullOnly="Y"/>

    <EntitySyncIncludeGroup entitySyncId="<POS Terminal ID>" entityGroupId="5501"/>
```

```xml
    <!-- POS Push Scheduled Service -->
    <!--
    <RecurrenceRule recurrenceRuleId="POSPUSH" untilDateTime="" frequency="MINUTELY"
intervalNumber="5" countNumber="-1"/>
    <RecurrenceInfo recurrenceInfoId="POSPUSH" startDateTime="2000-01-01 00:00:00.000"
recurrenceRuleId="POSPUSH" recurrenceCount="0"/>
    <RuntimeData runtimeDataId="POSPUSH">
        <runtimeInfo><![CDATA[<?xml version="1.0" encoding="UTF-8"?>
        <ofbiz-ser>
          <map-HashMap>
            <map-Entry>
              <map-Key>
                <std-String value="entitySyncId"/>
              </map-Key>
              <map-Value>
                <std-String value="POSPUSH"/>
              </map-Value>
            </map-Entry>
          </map-HashMap>
        </ofbiz-ser>
        ]]></runtimeInfo>
    </RuntimeData>
    <JobSandbox jobId="POSPUSH" jobName="Push POS Data" runtimeDataId="POSPUSH"
runTime="2000-01-01 00:00:00.000"
        serviceName="runEntitySync" poolId="pool" runAsUser="system"
recurrenceInfoId="POSPUSH"/>
    -->

    <!-- POSPULL Scheduled Service -->
    <RecurrenceRule recurrenceRuleId="POSPULL" untilDateTime="" frequency="HOURLY"
intervalNumber="2" countNumber="-1"/>
```

```xml
    <RecurrenceInfo recurrenceInfoId="POSPULL" startDateTime="2000-01-01 00:15:00.000"
recurrenceRuleId="POSPULL" recurrenceCount="0"/>

    <RuntimeData runtimeDataId="POSPULL">

        <runtimeInfo><![CDATA[<?xml version="1.0" encoding="UTF-8"?>

        <ofbiz-ser>

          <map-HashMap>

            <map-Entry>

              <map-Key>

                <std-String value="entitySyncId"/>

              </map-Key>

              <map-Value>

                <std-String value="<POS Terminal ID>"/>

              </map-Value>

            </map-Entry>

            <map-Entry>

              <map-Key>

                <std-String value="remotePullAndReportEntitySyncDataName"/>

              </map-Key>

              <map-Value>

                <std-String value="remotePullAndReportEntitySyncDataRmi"/>

              </map-Value>

            </map-Entry>

          </map-HashMap>

        </ofbiz-ser>

        ]]></runtimeInfo>

    </RuntimeData>

    <JobSandbox jobId="POSPULL" jobName="Pull Data from MCS" runtimeDataId="POSPULL"
runTime="2000-01-01 00:00:00.000"

        serviceName="runPullEntitySync" poolId="pool" runAsUser="system"
recurrenceInfoId="POSPULL"/>
```

</entity-engine-xml>

### Fixing Timestamps issues

this is related to this thread

You need to make sure you aren't doing a PUSH in the other direction that overwrites the records that did not pull correctly.
Changing the timestamps is just a tool to help you isolate your problem, not a solution. The timestamps to be changed are the ones on the records that did not pull correctly, NOT the runtime entities or job.

It has been quite a while since I did this, but here are the steps I think you should take:

1. Initiate your PULL with a recurrence of about 5 minutes (do not setup any PUSH processes yet).
2. Locate a record known to not PULL correctly and verify that it did not pull this time.
3. Update the timestamp on the MCS for that record. Have the xml ready to load thru web tools before starting the PULL process. The key here is to just make sure the date and time is set to something later than when the job ran.
4. Let the PULL run again and check the record on the POS client to see if it updated properly this time.

If this test doesn't work, check your time settings on both machines. I suggest setting both servers to the same time and time zone, Do this at least during testing to eliminate possible variables.

I found it easier while troubleshooting this problem to start clean with every test. That means dropping and recreating the database on the POS client a lot.

# Appendix B

## JavaOne 2007 Outline - David E. Jones

### - Past, Present and Future of OFBiz

#### - Short History of OFBiz

    - Conceived 13 May 2001, will be 6 years old the Sunday after JavaOne
    - First 6 Months: layout framework objectives, application base structure including initial universal data model
    - Next 3 Years: iterative simultaneous development and refinement of framework tools and

application artifacts
- Last 2.5 Years: after initial completion/stabilization of framework, huge refactoring of existing artifacts and build out of base enterprise application artifacts
- Became a Top Level Project at the Apache Software Foundation in December 2006 after 11 months of incubation

## - The Next 6 Years

- First Year: Complete build out of enterprise applications for OOTB use by a wide variety of organizations
- In 2 Years: the market leader for medium and large scale retail applications (ecommerce and POS)
- In 4 Years: more installed ERP seats than SAP and more CRM seats than Siebel and SalesForce.com
- In 6 Years: 20% of global economic activity managed with OFBiz

## - How Do We Get There?

- Community-driven, non-profit, open source project
- Open source based companies offering services, products, etc
- Customized solution end-users (medium to large sized companies)
- Commercial derivative works, specific to a certain type of business (small to medium sized companies)
- OFBiz community currently mostly service providers, like the presenters who are from two competing and cooperating companies

## - Open Source Resource Model

- Community-driven, non-profit, open source model is the most efficient and scalable collaboration model, period
- An idea and needs based collaboration model that is an alternative to the money based collaboration model
- We don't believe for-profit open source companies exist, just community-driven non-profit open source projects and commercial software products some of which use open source licenses, usually GPL or HPL to encourage users to purchase a commercial license while still being able call their product "open source", but that are developed and maintained by a paid staff more than by a community of users; this model has limited scalability and will have trouble competing with both community-driven open source projects and totally commercial products

## - Commercial and Open Source Boundaries

- Q: Why commercial derivative works at all? Why not just open source?
- A: The open source model is a great way to collaborate among people with similar needs, but there are certain industries made of mostly smaller companies that cannot afford a custom solution but if enough of them pool financially and if the solution for them is based on OFBiz and managed completely by the provider then a model emerges that benefits both end-user and provider, and that still increases the contributing community of the open source project.
- Q: Why would anyone want to contribute to the open source project?
- A: Enlightened self interest. Not everyone realizes it right away, but maintaining enterprise software is extremely expensive. If a company can reduce costs for things they need but that are not differentiating, they can focus their development and maintenance budgets on things that make a difference in their market. Participating in the open source project is an opportunity for a large group of companies to do just that.

# - OFBiz Framework Differentiators

## - Enterprise Grade Design, 4GL-like Efficiency

- Multi-Tier, Loosely Coupled, Service Oriented Architecture
- Designed and Developed and Refined Iteratively based on years of actual implementation and maintenance efforts
- Ability to use and mix high level and low level technologies
- Tools designed for specific uses
  - Widgets for common applications elements: screens, forms, menus, trees
  - Special "mini language" for data validation, mapping, etc intensive logic (most of what goes into business applications)
- Easy support to plug in artifacts written using low level tools and languages (template engines, scripting languages, Java code, etc)

## - Artifact Reference Diagram - Framework Tool Relationships

## - Technology Flexibility

  - Based on Java
  - Support for multiple technologies in JVM, not locked into anything
  - Support for external front end communicating via SOAP, other RPC
- Logic Layer
  - Service Oriented Architecture, rather than Object Oriented
  - Enables applications logic written in a service-oriented way, and not just wrapped in

service mapping code
- Service calls location and implementation agnostic, just care about input and output in calling code
- Easy interaction with enterprise service bus, and other service-based systems and system-wrappers
- Synchronous, Asynchronous, Scheduled Services with Job Manager
- Business Event system with ECA (event-condition-action) rules

### - Data Layer

- Use relational data model and patterns top to bottom
- No Object-Relational mapping, eliminates significant redundant code
- Meta-data driven database interaction
  - creation and maintenance of physical database
  - SQL generation for queries and updates
- Database interactions transparent making design and optimization natural

### - Example: Add a New Field

- Add field to entity definition (framework/example/entitydef/entitymodel.xml)
- No change in service definition (framework/example/servicedef/services.xml)
- No change in form definition required (framework/example/widget/example/ExampleForms.xml)
- Can easily add drop-down, lookup window, etc in form definition

### - Logic and Process Practices

- Service Composition (high level services based on low level services)
- High Level Process Management with SECA Rules
  - Defined independent of system services, trigger on business event
  - When Shipment Packed, Complete and Invoice Order
  - Custom add on: When order completed for product X send order information to external system
  - Custom add on: When task completed by person in a work group, send notification email to manager(s) of the group
- Scheduled Services: data cleanup, warehousing; place automated orders; check late tasks

## - OFBiz OOTB Business Application (Infrastructure, and Ready To Use)

- All applications based on common universal data model
- Initial data model and data structure concepts based on The Data Model Resource Book,

Revised Edition, Volumes 1 and 2 by Len Silverston
- Base data, logic and user interfaces usable out of the box, but all designed and written to be customized and extended as needed for end users
- Both tools and applications designed and written and used by consultants and end-users who create and maintain customizations and extensions
- Can created derived application with little duplication of artifacts using inherit and override mechanisms available throughout the framework (makes it much easier to keep up to date with and collaborate with others in the open source project and community)
- Low risk: with no licensing can get full access and dedicate resources into learning about the applications and making a decision
- Low Cost: both cheaper initially and to customize and maintain over time with completely open design and code, and a services market with no anti-competitive or artificial factors
- Build vs. Buy, now with alternative of OFBiz

## - High Level Customizations

- Derived Applications
  - Use include element in controller config (applications/ecommerce/webapp/ecomclone/WEB-INF/controller.xml)
  - Override and add view-map and request-map elements as needed in controller.xml
  - Add new decorator screen, override in web.xml file context variable
  - Reuse data prep scripts, templates; inherit/override form definitions
  - Custom services, input processing scripts (applications/ecommerce/script/org/ofbiz/ecommerce/customer/CustomerEvents.xml)
    - Common Pattern: simple-map-processor, check-errors, call-service

## - Well Known OFBiz Users

- Brainfood clients
- United Airlines: Ameniti and Silver Wings Plus travel club sites (production), other efforts in progress
- British Telecom: huge ecommerce project in progress for over a year, should be in production by JavaOne
- Snaidero Group (need details from Jacopo)
- others?

# OFBiz Framework: An Innovative Approach to E-commerce

http://www.dotcominfoway.com/blog/ofbiz-framework-an-innovative-approach-to-e-commerce

Upcoming trends in E-commerce focus on alleviating a developer’s problems in building breakthrough E-commerce applications. E-commerce frameworks are effective only if they reduce the developer’s pain of reproducing an application with same functionality/coding and allow them to customize the existing code to the utmost extent. Else, the framework should faciliate creation of new functionalities/coding which can in turn be reused in future application development process.

## OFBiz Framework

OFBiz is one such noteworthy free opensource framework that is based on Sun JAVA, J2EE, W3C XML, WfMC XPDL, HTML, OMG GL and SOA. It has a loosely coupled multilayered architecture that implements design patterns such as Model-View-Controller (MVC), Service Oriented Architecture (SOA), and database-independant persistance layer that allows existing or custom-developed applications to be added by dropping into a components-based architecture.

## OFBiz: Component-Oriented Architecture

OFBiz is totally a component-oriented architecture in which each module or a functionality can be defined as a seperate component and can be integrated into the same application or reused across many applications deployed in the same server. For this, OFBiz comes up with its own in-built server OFBiz that in itself contains Tomcat 6.0 and Tomcat 5.5, out of which we can choose one.

## OFBiz: MVC Architecture

The MVC mainly consists of reusable decorator patterns in the form of special purpose templating language called FTL (FreeMarker Template Language) instead of the traditional JSP pages. The templates together work with actions in the form XML meta-programming that are coded as Screen Widgets. The widgets and FTL together become reusable across many different applications, for example, the same Login Widget can be used in both Shopping as well as Accounting applications. Thus, MVC achieves the true means of reusability in the form FTL templates and Screen Widgets. The actions can be invoked using special scripting language called BeanShell Script or Groovy. To add look and feel for the application, OFBiz greatly supports integrating predefined visual themes or customizing the existing themes or a newly created theme.

## OFBiz: Service-Oriented Architecture (SOA)

Next comes Service-Oriented Architecture (SOA) which sits in the middle part of the tiered framework and contains the core business logic to be processed. Services in OFBiz operate in a Service-Oriented Architecture (SOA). These services not only have the ability to invoke other services internally, but can also be 'opened up' and invoked by remote applications using, amongst other methods, the widely adopted messaging protocol SOAP.

### Behavioral Model' for Code Organization

Besides serving as a platform for interoperability, OFBiz services also offer us additional capability to organize our code. Java has made a paradigm shift towards object-oriented programming design from traditional procedural model by encapsulating methods and variables together into objects to form a "real world object model" for code organization. Likewise OFBiz also groups up behavior together to form a coherent "service". Thus, OfBiz services goes yet to another higher level than Java's object towards code organization.

### Minilang reduces development time

The services functionally are defined either using service configuration in the form of Minilang, an XML-based language or can be defined in Java. But Minilang would be the better option because with Minilang, the developers time is much reduced as it is used to implement simple and repetitive tasks. We need not compile our code each time because of its XML based script and is implemented much faster than Java services. With Minilang, we need not restart our application each time the services are redefined or modified. A simple browser refresh is enough to see the changes.

### Minilang vs Java

Minilang services are referred to as "simple" services. They are defined and invoked in the same way as Java services. They can be invoked by the control servlet from the controller.xml file or from code in the same way as a Java service.

With Minilang, the developer must make a choice. Some developers choose not to increase the already steep learning curve associated with the framework by learning the syntax by heart. Since everything that is possible in Minilang is possible in Java and the fact that Java offers limitless possibilities, while Minilang is limited, many developers choose never to develop in Minilang. However, it is undisputedly easier to code quick and simple services in Minilang than in Java. Especially if you use an auto-completion XML editor, like XMLBuddy, which is again open source. When designing their code, the developer should decide how complex their service is going to be and decide whether to use Java or Minilang.

### How far does Minilang provide security for services?

Since OFBiz is mainly meant for E-commerce based application, the e-commerce component of OFBiz should allow customers to edit and view their own orders, obviously checks need to be made to be sure that customers are not viewing or editing other people's orders. In such a scenario, permissions can be checked in Minilang, say, tags that are already predefined in Minilang.

### OFBiz – Entity Persistence Layer

The most salient and independent part of the OFBiz framework is its Entity Persistence Layer, which is totally database independent. The developers need not go and create tables indeed or do any hardcoding in Java to connect their application with database and pass parameters to insert into table, do updation or deletion, or even pass queries to retrieve data. The entire thing is taken care by OFBiz’s Entity Engine itself which consists of two XML files namely entity-model.xml and entiy-group.xml that can be configured to fit into any database of the developers’ choice. This enables the developers to easily migrate their database from one vendor to another vendor and easy code maintainance, i.e. developers need not do any minor change to their code for the cause of database migration.

# New Features Roadmap

The long term goal of the OFBiz project is to build a complete, features set rich, universal and configurable "enterprise automation software" (ERP, CRM, CMMS, MRP etc.).
OFBiz is one of the few applications of this type developed by a community, rather than one corporation.
Even if the final long term goal is clear and well-defined ("building a universal enterprise automation software"), the short and medium term tasks to accomplish it are not.
The following is a proposal for the definition of a list of short and medium term tasks list: your input, suggestions and help is welcome. Please add your comment at the bottom of the page.
Legenda:

- "People interested": the people that think that the feature should be considered a priority for the project (in the short term)
- "People willing to help": persons that are in the position to help with the development of the task; if possible specify an approximately number of hours per week or month to give an idea of the total resources available for each task

## Implement Human Resource Application

Enhance employee profile management, Add support for employee loyalty program, continues training management, cost to company management, salary statement report, implement security so employee can manage their account.
See the project's specific page here
**People interested:** Anil Patel
**People willing to help:** Anil Patel

## Implement Recruitment application

Add a special purpose application for managing recruitment in a company.
See the project specific page OFBIZ:Recruitment applicationhere
**People interested:** Anil Patel
**People willing to help:** Anil Patel

## Implement Asset management application

Add a special purpose application for managing assets in a company.
See the project specific page here
**People interested:** Anil Patel
**People willing to help:** Anil Patel

## Implement Project Management Application

Implement project management application (designed for service companies like the most common ones who use ofbiz: lots of clients and projects and a steady stream of tasks to manage across multiple roles and teams); this is a specialpurpose app built (mostly) on the WorkEffort component
This component is nor pretty much finished.
See the project's specific page here.
**People interested**: David Jones, Hans Bakker, Anil Patel, Pierre Smits
**People willing to help**: Hans Bakker, Anil Patel

## Complete the implementation of the Accounting component

Finish implementation of the OFBiz accounting component, both the auto-posting to GL services and a nice complete set of reports (the 4 standard accounting 101 type reports plus a complete set of financial metrics)
See the project's specific page here.
**People interested**: David Jones, Jacopo Cappellato, Scott Gray, Jim Barrows, Anil Patel
**People willing to help**: Jacopo Cappellato, Scott Gray, Jim Barrows, Anil Patel

## Implement Automated Tests for the most common processes

Implement a set of service-level test cases that go through the most common high-level processes in the system, like the ones documented in the role oriented documentation on docs.ofbiz.org; these will help have some sort of regression tests that are widely applicable, even if UIs are customized, and should cover many service-level customizations with little or no test case changes too
**People interested**: David Jones, Jacopo Cappellato, Anil Patel
**People willing to help**: Anil Patel

## Continue the development of the integrated component for Business Intelligence

Continue the work started in the specialpurpose "Business Intellicence" component: Implement new dimensions (Ship-To-Customer, Warehouse, Promotion, Store etc...) and data migration services; implement new facts and starschemas; improve the reporting tools (possibly including an external tool for dimensional reports).
**People interested**: Jacopo Cappellato
**People willing to help**: Jacopo Cappellato (4 hours per week)

## Complete the support for VAT (Value-Added-Tax)

See the project's specific page here.
**People interested**: Jacques Le Roux, Jacopo Cappellato, Marco Risaliti, Pierre Smits
**People willing to help**: Marco Risaliti, Jacques Le Roux, Hans Bakker

## Add support for online contextual help

**People interested**: Hans Baker, Sharan Foga, Jacques Le Roux
**People willing to help**: Hans Baker, Sharan Foga, Jacques Le Roux

## Screen and Form widget enhancements

See the project specific page here
**People interested**: Anil Patel
**People willing to help**: Anil Patel

## Improve the Content Management Component

have a content management system which is comparable, in terms of features, to the more popular open source content management applications
**People interested**: Si Chen, Al Byers
**People willing to help**: Al Byers (5 hours per week)

## Improve the SFA Component

have a SFA/CRM which is comparable, in terms of features, to the more popular open source SFA/CRM applications
**People interested**: Hans Baker, Pierre Smits, Jacques Le Roux
**People willing to help**: Hans Baker, Jacques Le Roux

## Ecommerce component enhancements

See the project specific page here
**People interested**: Si Chen, Anil Patel
**People willing to help**: Anil Patel

## Improve usability of the Catalog manager

**People interested**: Si Chen
**People willing to help**:

## Complete the refactoring of Permissions control

**People interested**: Jacopo Cappellato, Adrian Crum, Andrew Zeneski
**People willing to help**: Jacopo Cappellato (2 hours per week), Adrian Crum

## Complete the migration of older bsh/ftl files to widgets

**People interested**: Jacopo Cappellato
**People willing to help**: Jacopo Cappellato (2 hours per week)

## ~~Enhance the integration with eBay~~ DONE

~~Isolate the code into a new specialpurpose component. Complete the support for the creation of eBay auctions from OFBiz; improve the synchronization between OFBiz and eBay: order/shipment status changes, in/out communications, etc...~~
~~**People interested**: Marco Risaliti~~
~~**People willing to help**: Marco Risaliti~~
~~OFBIZ-1441~~

## ~~Enhance the integration with Google Product~~ DONE

~~Isolate the code into a new specialpurpose component. Add more features and options to the product export.~~
~~**People interested**: Marco Risaliti~~
~~**People willing to help**: Marco Risaliti~~
~~OFBIZ-1372~~

## Integrate Screen Widget and Form Widget with Dojo.

**People interested**: Mike Wong
**People willing to help**: Mike Wong

# Non Backward Compatible Changes

## ~~Use Apache Commons EL instead of the Flexible String Expander~~ DONE

Committed to trunk December 2008.
UEL in OFBiz

## Change the Entity Engine to be user aware for security, logging

This would be a change to require that a userLogin be passed to all Entity Engine calls. The Entity Engine could then check permissions to see if the user can modify or view that entity, or that record. The Entity Engine could also auto-populate fields like created by and updated by.
There are big downsides to this in that it is a real pain to ALWAYS have to know which user is doing stuff, and lots of our services don't know who the user is or use the "system" user to get around security constraints. The same thing would have to happen if we did this for the EE. This would also require major API refactoring, which we would probably want to precede with a big reduction in API size, as has been started but isn't yet finished.
Maybe the API refactoring wouldn't be necessary if we created a user-aware decorator for the GenericDelegator.

## UI (User Interface) enhancements

### Links in screenlets.

- Have less (or even none) buttons in header
- It was also suggesteed to use screenlet like how gmail does. Notably
  - Three buttons max
  - Dropdown for other actions
  - The idea of duplicating at bottom
- Having breadcrumbs under the title bar
- Using portlets in place of screenlets
- Recently (12/08) I was discussed if we should remove the screenlet's navigation-form-name attribute. There are (at least) 3 reasons for that
  - Less informations/features than with default (pages numbers, ability to jump to any page)
  - The last button does not always work (try with widget.form.defaultViewSize=2 when listing invoices)
  - Pagination should be available to the user always in the same way in order to have a consistent UI.
    Then we have 2 possibilities
    1. Remove this attribute and all current uses.
    2. Keep it but then

1. we should at least make it works (last button issue)
2. make it consistent with the standard way (direct page access)

## ~~OFBiz Theme Gallery~~ DONE

Visual Themes Gallery

## Web tools

- Entity Data maintenance
  - have vertical separators for columns when viewing entity content, **This issue is no longer a problem in new themes like Bizness Time...**
  - make the Find options a collapsible screenlet, **This issue has been partially addressed with the "Advanced Search" in Lookups**
  - make styles of the Entity Data Maintenance screens in general the same than used by the widgets. **I think it's done**
- At large, maybe restyle all the Web tools page (not a priority)

## Introduce Mashups

Example in OFBIZ-1873

## List

To have in the results list form of every FindScreen (optionally) a first column of check boxes that let the user to select several items and than a combo box above the list that let the user to select a command to execute on them.

## Applications Tabs (Std Theme)

- Sorting
  - The tabs should be sortable not only by alphabetical order in English but in other languages too.
  - An user should to be able to position the tabs according to their preference
- Having something to select the apps desired for a "quick links" bar, and maybe have that go beyond just tabbed applications and include individual pages for easy access.
  **We still need that for 'old' themes but it looks like they will be deprecated with new themes like Bizness Time...**

## Light-blue Theme (or future themes alike) enhancement

Currently we have a Windows Start model UI, or rather a Gnome desktop model but with a sole entry point (Home).
We could, like IMO it's done elegantly in Ubunut/Gnome, have more entries point namely:

- Top Level Applications
    - We should introduce drop-down menus to group applications (like AR and AP under Accounting). Doint that, we should keep in mind permissions access for each sub-application.
- Addon Applications (better name ?)
    - Replace the secondary menu (at bottom) with a primary menu top drop-down item.
- System Applications
- etc.

**A 1st answer is done in the new Bizness Time theme**

## Quicker an intuitive access to basic functionnalities

Following Bruno's suggestion about Compiere UI. We could put a link to https://localhost:8443/partymgr/control/createnew everywhere we have a party lookup, using the party label at left of the field. Actually we could generalising everywhere we have a lookup for something.
It's easy to click on the Party tab and then on "Create New". But after reading BJ's reading suggestion, it's also an easy way to teach newbies how to do it. Easy for us to introduce, and easy for newbies to use, maybe with a tooltip "click on party to create". This would fill the Condition #2 of the article above.
Of course being able to show the screen where the choice of the type of party to create is done, and then the screen where data are entered in a CSS hidden/shown window like the calendar would be great and could be our next target. This would allow to not leave the page the user is on and would create a less disturbing environment. But I know that this would also mean to preload these windows in memory and is maybe out of reach at the moment (from a memory POV, without speaking of the code needed). Else we could do the same thing for all the lookups, having them poping up as fast as the calendar. From a code POV, perhaps generalising from the calendar code could be a way (this last suggestion is more a dream for the future - sometimes not so far - than anything else) 🙂

For a first effort, it was suggested that tools tips that direct the user to the necessary steps would be sufficient. Like "create new ($whatever) by clicking on ($whatever1) tab and click on ($whatever2) link" could make the tooltip a template and ($whaterver1-2) is the only things that is a variable. Of course then you can enhance the tool tip to handle links. Then you could just modify the I8N files without touching code "Click here to ($whatever)"
The tooltips labels could be in there own file for an entity. A class that would bes similar to the one that maintains the DB tables can be hooked into Create of the file to add the tooltips.

This could be set to defaults based on the Field type.
Now we have the ability to put parms into the label in the I8N files, so the tooltips would have the same ability. Like "Click here to ($whatever)" would turn into "Click here to see the productlist" as a tool tip. You would just have the fieldname like in the labels file. Barring having a seperate file, then having the tooltip_$fieldname like tooltip_$Phonenumber would work.

## Fields-group

Add a mechanism to allow to collapse/uncollapse all groups-fields in one click (something like that also exists in Compiere UI, see above) **Done, I wonder if we should use an icon, or even both ?**

- Use the screenlet and put an icon (or a word, it's an icon in Compiere) in the screenlet title bar for that.
- **OR**
- Another (easier) possibility would be to use the 1st field-group and to make a relation between it and other field-groups. This because in all cases we will no make this 1st field-group collapsible (at least it's how we have done so far) and we could then put an artifact there. This would also allow to not have a mandatory screenlet when using collapsible field-groups

## Some i18n issues and best practices

- Typography : Typography depends on languages. For instance in French we put a space after colons, there are other cases of course. So punctuation should be always part of labels.
- HTML : We already discussed about not putting any HTML tags in labels. Also we should not put any < and & which would not be correctly rendered (http://www.w3.org/TR/REC-xml/#dt-chardata), so should be escaped.

## Some suggestions from Jacopo on user ML

- better error/success messages
- better handling of keyboard tab to move from one field to another
- more and better multi row submit screens
- more informative form fields (e.g. showing descriptions instead of just ids)
- enhancing field interactions (the value of one field can change/ hide/ etc other elements/data in the screen)

- I (JLR) would add something I saw in SugarCRM and found very useful : their "info icon" which when you hover over it show related information (for a contact its contact mechs, etc.)