

# QAD Customer Self Service (CSS) Release Notes

## September 2010

These release notes include information about the latest QAD Customer Self Service (CSS) fixes and changes. These changes may affect the way you implement and use QAD CSS.

Review this document before proceeding with any phase of a QAD CSS implementation.

These release notes are cumulative, with the most recent changes displayed first. Review the notes for all releases after your currently installed release. Installation and configuration changes may have occurred in those intermediate releases, and unless otherwise noted, apply to the release where they were announced, as well as subsequent releases.

QAD highly recommends that you implement the latest QAD CSS release available. Check the QAD Web site to make sure you have the latest QAD CSS release notes, installation errata, installation guide, and installation media.

<http://support.qad.com>

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# Release Notes for Current Release

**QAD CSS Version:** 5.1.2

**Release Date:** September, 2010

**QAD Product Suite Compatibility:** eB2.1 SP2 through SP4, QAD 2007, QAD 2007.1, QAD 2008 Standard, QAD 2008 Enterprise, QAD 2008.1 Standard, QAD 2008.1 Enterprise, QAD 2009 Standard, QAD 2009 Enterprise, QAD 2009.1 Enterprise, QAD 2010 Standard, QAD 2010 Enterprise, QAD 2010.1 Enterprise

## Documentation Updates

The following documentation has been updated for this release:

- *Installation Guide: QAD Customer Self Service (78-0887A)*

## New and Changed Features

- A new Order Upload function is now available under the Administration menu for you to load existing sales orders from XML files into CSS. You can use an XML template file that ships with CSS to create source sales orders to be loaded into CSS. An XML file can contain multiple order lines in a sales order.
- You can now use a new registry field unitPriceDecimalPlace to specify the number of decimal places in the item unit price. The default value is 2.
- CSS now supports the HTML e-mail format. A new system registry MIMEHeader is available for setting the e-mail MIME type:
  - To send e-mail in plain text, set its value to “type=text/plain;charset=us-ascii:filetype=ascii”.
  - To send e-mail in HTML, set its value to “type=text/html;charset=us-ascii:filetype=ascii”.
- A new registry field setDueDate is now available for setting the order due date:
  - Yes: Set the header/line request date as the header/line due date.
  - No: Use the default due date from QAD Enterprise Applications.
- The shopping cart message column, which is only applicable to QAD EE, can now be disabled when CSS is integrated with QAD SE.
- You can now click a user company to view its detailed information under User Registration. Previously, there was no logical way to view detailed user company information.

## Fixes

QAD CSS 5.1.2. is a service pack release that fixes the following defects:

| Internal ECO Number | Description                                                                                                                                           |
|---------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------|
| Q3Q8                | When showReqDate was set Yes and showLineReqDate was set to No in System Registry, request date on the order header did not apply to each order line. |
| Q3TM                | Order Template details could not be displayed in the Firefox browser.                                                                                 |
| Q3VM                | The ItemQuantityFormat registry setting did not work for Order Entry 3.                                                                               |
| Q3VY                | When the date format of the selected language is not mdy, many reports did not display correctly if the fields were left blank.                       |
| Q3XH                | CSS did not support BOL link tracking even when the function was enabled in Set Multiple BOL Print Utility (7.25.2) in QAD Enterprise Applications.   |

| Internal ECO Number | Description                                                                                                                            |
|---------------------|----------------------------------------------------------------------------------------------------------------------------------------|
| Q3YQ                | When the showLinePromDate registry was set to False, request date on the order was not assigned to the order header properly.          |
| Q3Z1                | The message box raised from User Message Detail Maintenance was not displayed properly.                                                |
| Q3Z2                | The User Message Detail page was missing.                                                                                              |
| Q3Z3                | Descriptions of items with images contained unexpected white spaces.                                                                   |
| Q3Z9                | The Cancel button on the Personal Administration page led to an incorrect page destination.                                            |
| Q3ZH                | Order tracking reports did not display invoices correctly.                                                                             |
| Q3ZQ                | The Personal Admin page displayed incorrect error messages when you left secret question and secret answer blank and clicked Update.   |
| Q40T                | CSS did not display item descriptions for each line in Sales Order Quote.                                                              |
| Q41H                | Customers on credit hold were still able to submit and have their orders processed without any alert messages.                         |
| Q41S                | CSS checked credit statuses of sold-to customers only instead of bill-to customers.                                                    |
| Q42D                | The product catalog could not let you see all the items when there were too many pagination views and the Next button was displayed.   |
| Q42J                | The HideOrderEntry registry field, which was used to hide order-entry-related menus for customers on credit hold, was not implemented. |
| Q431                | Item browse in Item Order Entry 3 could not be configured in Browse Maintenance to support search by descriptions.                     |
| Q3XQ                | Large data amount led to serious performance issues during the order entry process.                                                    |
| Q444                | The system could not locate help files when the help path contained multiple levels.                                                   |
| Q465                | The system could not determine the credit hold status of the customer from QAD EE.                                                     |
| Q46Y                | Item lookup browse did not return the correct result.                                                                                  |
| Q47N                | The comments display option was not properly implemented in CSS.                                                                       |
| Q480                | In certain circumstances, the carrier href led to the wrong URL.                                                                       |

# Release Notes for Release 5.1.1

**QAD CSS Version:** 5.1.1

**Release Date:** December, 2009

**QAD Product Suite Compatibility:** eB2.1 SP2 through SP4, QAD 2007, QAD 2007.1, QAD 2008 Standard, QAD 2008 Enterprise, QAD 2008.1 Standard, QAD 2008.1 Enterprise, QAD 2009 Standard, QAD 2009 Enterprise, QAD 2009.1 Enterprise

## Documentation Updates

The following documentation has been updated for this release:

- *Installation Guide: QAD Customer Self Service (78-0666D)*

## Fixes

QAD CSS 5.1.1. is a service pack release that fixes the following defects:

- The system could not calculate vertex taxes.
- When a new B2C customer was created, address tax data, customer freight data, and the Disc Pct value (customer credit data) did not default from the default B2C customer, which caused the following issues:
  - When the default B2C customer had a tax rate defined, the system always calculated taxes for the new B2C customer even when Taxable was set to No for the default B2C customer.
  - When the address tax data of the default B2C customer was updated, the system still used the new data to calculate taxes for B2C sales orders.
  - The system did not calculate freight charges for B2C sales orders.
- The system always used the discount rate from the B2C customer data to calculate prices without using the best pricing logic.
- On some Windows platforms, the system ran into errors during credit cards processing.
- When creating a new B2C customer, the system copied the tax zone from the default B2C customer rather than select one based on the new customer address.

# Release Notes for Release 5.1

**QAD CSS Version:** 5.1

**Release Date:** September, 2009

**QAD Product Suite Compatibility:** eB2.1 SP2 through SP4, QAD 2007, QAD 2007.1, QAD 2008 Standard, QAD 2008 Enterprise, QAD 2008.1 Standard, QAD 2008.1 Enterprise, QAD 2009 Standard, QAD 2009 Enterprise, QAD 2009.1 Enterprise

## Documentation Updates

The following documentation has been updated for this release:

- *Installation Guide: QAD Customer Self Service (78-0666C)*
- *Implementation Guide: QAD Customer Self Service (78-0659B)*
- *Administration Guide: QAD Customer Self Service (78-0658B)*

Combining CSS 5.0.1 and CSS 4.2.3, QAD CSS 5.1 is a unified version that supports both the Standard and Enterprise Editions of QAD Enterprise Applications and serves as a common baseline for future QAD CSS releases. Previously, two branches of QAD CSS—4.x and 5.x versions—were maintained and released to support QAD SE and QAD EE respectively. There are no new and updated features in this release.

## Fixes

The following defects have been fixed in this release:

- The system did not properly display customer names in Customer Maintenance when identical numbers existed.
- The system only displayed customers in the current domain in Customer Maintenance.
- When you added a new user, the Data Source list was not disabled.
- The sorting function did not work properly in Data Source Maintenance.
- When integrated with QAD EE, the system retrieved the State information from generalized codes instead of the Financials module.
- The Data From search criterion did not work properly in Customer Credit Report.
- Price of newly created items could not be converted into the current customer's currency correctly in the detail section of Customer Credit Report.
- When there was only one item in the shopping cart, clicking the Delete button generated a JavaScript error.
- When the domain currency was different from the one set for the default B2C customer, the system did not correctly display the correct currency in Order Summary and New Customer.
- The Balance From Before was always 0.00 in Customer Credit Report.
- If customers used different currencies, taxable total and non-taxable total in the sales quote were incorrect.
- Blank customer records were displayed in Uncommitted Orders Report.
- Customer ID was not displayed correctly in Unprocessed Orders Report.
- Clicking on the calendar control generated a JavaScript error.
- Uploading the same file twice in Catalog Upload used to cause failure.

- When the shopping cart was empty, clicking the Cart button caused a JavaScript error.
- When PaymentOption was set to Purchase Order in System Registry, the Sales Quote Finish Order page could not be displayed normally.
- Clicking an invoice number in Customer Credit Report failed to display the invoice history.
- Account aging was incorrectly displayed as a question mark in Customer Credit Report.
- When you created a new B2C customer, freight information was not carried over from the default B2C customer.
- When a list price price list was defined for an item, the system could not display the item price correctly during order entry.

# Release Notes for Release 5.0.1

**QAD CSS Version:** 5.0.1

**Release Date:** June, 2009

**QAD Product Suite Compatibility:** QAD 2008 Enterprise, QAD 2008.1 Enterprise, QAD 2009 Enterprise

## Documentation Updates

The following documentation has been updated for this release:

- *Installation Guide: QAD Customer Self Service (78-0666B)*

## New and Changed Features

- The showDeliveryIcon system registry has been modified to determine whether the Delivery icon for calculating the promise or due date is displayed in the Shopping Cart summary page.
- The Add and Delivery buttons are now displayed in their respective columns in the item list.
- The defaultCustomerProfile registry has been modified to support multiple values delimited by comma, each representing a default B2C user in a particular domain. This way, you can have a single B2C site support multiple domains by passing different default B2C user IDs to CSS through the B2CURLParameter value.
- When multiple-domain support is enabled in CSS, the defaultSite, defaultShipVia, and defaultTimeZone registry settings are not used. Instead, the defaultCustomerProfile value is used to create the B2C customer data when an order is submitted.
- The Verisign credit card API has been replaced by the Paypal credit card API.
- CSS now supports QDoc version ERP3\_2 instead of 2008\_2.
- QDoc name and QDoc version are now configurable so that CSS can work with the most current QXtend version.

## Fixes

The following issues have been fixed in this release of CSS:

- Entering over eight lines of comments during the order entry process causes system performance issues.
- No error message appears when the user types a wrong user ID/password combination in the Login Register page.
- The shopping cart sometimes shows a blank page with only header and footer.
- The empty feature is not displayed in the configuration page.

## Setting Up Default B2C Users for Multiple Domains

QAD CSS now lets you set up a site to support multiple domains. The steps for setting up the default B2C user have changed.

- 1 Set up a customer in QAD ERP that represents the generic B2C customer. Any B2C user that logs in to the CSS site will default to this customer.

If you are implementing a B2C site that supports multiple QAD ERP domains, you must create the default B2C customer for each domain in QAD ERP.

For detailed information about setting up customers in QAD ERP, see *User Guide: Financials A*.

- a In Customer Create (27.20.1.1), create the default B2C customer record and related financial data.

Use the guidelines in the following table in addition to the information provided in *User Guide: Financials A* when creating the customer.

| Field              | Description                                                                                                                                                                                                                                                                 |
|--------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Customer Code      | You should create a new ID in that will not be used for any other purpose.                                                                                                                                                                                                  |
| Business Relation  | Business relation information is required even though the information for real customers will vary. These values are required for the tax calculation during the quote process. You should specify values that represent typical values associated with your B2C customers. |
| Credit Terms       | These are typically related to credit card payment.                                                                                                                                                                                                                         |
| Fixed Credit Limit | Set this to a value high enough to support the kinds of items your customers buy.                                                                                                                                                                                           |
| Taxable Customer   | Set this to Yes to ensure that tax calculations are performed.                                                                                                                                                                                                              |

- b In Customer Data Maintenance (2.1.1), complete required fields for the customer you created to make customer data complete.

This is required for the customer record to be loaded into and used by QAD CSS.

Use the guidelines in the following table in addition to the information provided in *User Guide: Financials A* when completing the customer data in Customer Data Maintenance.

| Field       | Description                                                                                                                                           |
|-------------|-------------------------------------------------------------------------------------------------------------------------------------------------------|
| PO Required | Ensure this is set to No. When this is set to Yes for the customer record in QAD ERP, entry of a PO number is required during order entry in QAD CSS. |

- c In Auto Number Customer - Modify in QAD ERP, select the Active field to enable autonumbering for the B2C customer.
- d After setting up the customer record in QAD ERP, test it by creating a quote for this new customer in Sales Quote Maintenance (7.12.1). You need to ensure you can proceed through the entire sales quote frame sequence accepting default values without filling anything in, using only the Next and Back buttons. This is required for the quote from QAD CSS to load successfully.

- 2 Create the default B2C customer in QAD CSS.

Load the default B2C customer record you previously created in QAD ERP into QAD CSS using Customer Load. If you created more than one default B2C customer for multi-domain site implementation, load them all into QAD CSS.

- 3 Create the default B2C user in QAD CSS and associate this user with the default B2C customer record.

Use the following steps to set up the default B2C user in QAD CSS. Additional steps for setting up default B2C users for multiple domains are also included.

- a** Create a security group specifically for B2C customers in Security Group Maintenance.
- b** Specify this security group for the *B2CSecurityGroup* registry setting in System Registry.
- c** In User Maintenance, create a generic user as the default B2C account and associate the default B2C customer with this user.

Click Add/Edit Associations in User Maintenance and then click Add in User Detail Maintenance. Enter the following in User Detail Editor.

- In the Company ID field, specify the default B2C customer.
- Assign the user to the B2C security group as previously defined in the *B2CSecurityGroup* registry.
- Set ID type to Customer.
- Set the start page to *op/op\_indexB2C.html*.
- Specify a unique marketing group with this customer/user association, such as *B2C\_Mktg\_Group*. This lets you tailor promotions for your B2C customers.

For multiple domains, perform this step for each domain.

- d** In System Registry, set the key value of *defaultCustomerProfile* to the default B2C user ID. For multiple default B2C user IDs in support of multiple domains, separate them using commas; for example, if you created CNCust for domain CN and USCust for domain US, enter CNCust, USCust as the key value.
- 4** Set up security in Menu Button Maintenance and Menu Maintenance using the B2C security group.
    - a** You can customize which buttons display on the menu bar.
    - b** You may want to use a different page for the My Account button such as *lg/my\_account.html*. This is the page illustrated in the order examples in this chapter, which provides access to updating personal and address information, as well as viewing orders.
  - 5** Update settings in System Module Maintenance for the home page that B2C customers display.
    - a** You can determine which pages you want to let customers bookmark; you do not want them to bookmark pages that they cannot return to later.
    - b** Set the Login Required field to Customer and Session Required to No for *op/op\_indexB2C.html*.
  - 6** Specify *op/op\_indexB2C.html* as the value for the *defaultB2CHomePage* registry setting.

The default B2C user is set up.

To provide access to a B2C site that supports multiple domains, specify the default B2C user ID as the value of *B2CURLParameter* in the URL to differentiate among different domains. For example, for B2C shoppers to access the CN domain site, provide the following link on the portal site:

```
http://shopping.mycompany.com/cgi-bin/qad_wspd_cgi_101b03_csu93.ksh/WService=93web/op/op_indexB2C.html?B2CURLParameter=CNCust
```

# Release Notes for Release 5.0

**QAD CSS Version:** 5.0

**Release Date:** January, 2008

**QAD Product Suite Compatibility:** QAD 2008 Enterprise

**Note** During the product life cycle, QAD changed the name of the former MFG/PRO eB2.1 product to QAD 2008 Standard. Individual releases are identified by a decimal number; for example, QAD 2008.1 Standard. (The Service Pack 5 and 6 releases were branded as QAD 2007 and QAD 2007.1, respectively.) The Enterprise Financials version of the product is called QAD 2008 Enterprise and follows the same convention of identifying individual releases with a decimal number.

The following fixes and changes are included in this release and require additional configuration and installation change.

## Documentation Updates

The following documentation has been updated for this release:

- *Administration Guide: QAD Customer Self Service (78-0658A)*
- *Implementation Guide: QAD Customer Self Service (78-0659A)*
- *Installation Guide: QAD Customer Self Service (78-0666A)*

## New and Changed Features

- 1 This release of QAD CSS fully supports QAD 2008 Enterprise; it cannot be used with earlier versions of QAD product suite.
- 2 QAD CSS now supports item replacement. This feature lets the customer place orders for item B as a substitution for item A when the original item A is no longer available. Replacement items are defined in Item Replacement Maintenance (1.23.1) in the QAD ERP.
- 3 QAD CSS now supports item up-sell. This feature lets the customer place orders for replacement items or assemblies that are an upgrade or a level above the requested item in the item's product structure when the requested item is not available during order entry. Up-sell items are defined in Item Up-Sell Maintenance (1.23.5) in the QAD ERP.
- 4 QAD CSS now supports item cross-sell. This feature lets you offer to the customer items in addition to the item being ordered. Cross-sell items are typically complementary products to the requested item but do not replace the item being ordered. Cross-sell items are defined in Item Cross-Sell Maintenance (1.23.7) in the QAD ERP.
- 5 This release of QAD CSS includes a new context-sensitive help system; as a result, the Help Maintenance module is now obsolete.
- 6 QAD CSS now commits sales orders to the QAD ERP through an API instead of CIM loading. Also, sales order field mapping has changed in this release.
- 7 Only active and complete customer records in the QAD ERP can now be loaded into QAD CSS.
- 8 Credit Card Security Code (CSC) can now be provided during credit card payment in QAD CSS. This code is a three or four-digit number that appears on the credit card and provides a cryptographic check of the information embossed on the card.

- 9 The credit card address now defaults from the billing address of the shopper. Previously, the shopper had to enter a billing and shipping address and then enter the address associated with the credit card.
- 10 The Type column is removed from Credit Card Report as AR type is no longer used in the QAD ERP.
- 11 A new Market Desc field is now available to provide detailed marketing descriptions for each item. This field is displayed in the item detail page and can be turned off in Item Layout Maintenance in QAD CSS.
- 12 You can now look up module names for entering search criteria in Module Report.
- 13 Phone Number fields in QAD CSS are lengthened to allow for extension numbers.
- 14 Invoice Date From/To and Order Date From/To fields are added as additional search criteria in Internal Invoice History Report.
- 15 The PUK column name in Data Translation Report is changed to Primary Unique Key to be more intuitive.
- 16 Currency format is improved in the product price fields.
- 17 QAD CSS now retrieves active country data from the QAD ERP. Previously, country data was hard-coded in a number of modules.
- 18 QAD CSS now retrieves currency data from the QAD ERP instead of having them hard-coded in some modules as they were previously.
- 19 When creating customers, QAD CSS now uses the *DefaultLangForB2CCust* registry setting to set the customer default language code.
- 20 You can now add multiple items to the shopping cart in Order Entry by clicking a new Add All Selected Items button.
- 21 This release of QAD CSS is fully Unicode-compliant and supports multiple languages.
- 22 QAD CSS can now indicate in the order entry process whether an item is an expensed memo type item. You can enable or disable this feature using the *AlertMemo* registry setting. Memo items have no effect on inventory or MRP when they are placed on an order.
- 23 In the Address Setup page, QAD CSS now only displays countries marked as Active in Country Code Data Maintenance (2.14.1) in the QAD ERP for selection.
- 24 QAD CSS now uses QXtend Inbound to communicate customer data to the QAD ERP.

## Release Notes for Release 4.2.3

**QAD CSS Version:** 4.2.3

**Release Date:** April, 2009

**QAD Product Suite Compatibility:** eB2.1 SP2 through SP4, QAD 2007, QAD 2007.1, QAD 2008 Standard, QAD 2008.1 Standard

**Note** During the product life cycle, QAD changed the name of the former MFG/PRO eB2.1 product to QAD 2008 Standard. Individual releases of QAD 2008 Standard are identified by a decimal number; for example, QAD 2008.1 Standard. (The Service Pack 5 and 6 releases were branded as QAD 2007 and QAD 2007.1, respectively.) The Enterprise Financials version of the product is called QAD 2008 Enterprise and follows the same convention of identifying individual releases with a decimal number.

These release notes describe the most significant changes and fixes introduced with this version of QAD CSS:

- QAD CSS now commits sales orders to the QAD ERP database through an API instead of CIM loading. Also, sales order field mapping has changed in this release.
- The PUK column name in Data Translation Report is changed to Primary Unique Key to be more intuitive.
- Credit Card Security Code (CSC) can now be provided during credit card payment in QAD CSS. This code is a three or four-digit number that appears on the credit card and provides a cryptographic check of the information embossed on the card.
- Invoice Date From/To and Order Date From/To fields are added as additional search criteria in Internal Invoice History Report.
- The showDeliveryIcon system registry has been modified to determine whether the Delivery icon for calculating the promise or due date is displayed in the Shopping Cart summary page.
- This release of QAD CSS includes a new context-sensitive help system; as a result, the Help Maintenance module is now obsolete.
- The Add and Delivery buttons are now displayed in their respective columns in the item list.
- The defaultCustomerProfile has been modified to support multiple values delimited by comma, each representing a default B2C user in a particular domain. This way, you can have a single B2C site support multiple domains by passing different default B2C user IDs to the CSS through the B2CURLParameter parameter.
- When multiple-domain support is enabled in CSS, the defaultSite, defaultShipVia, and defaultTimeZone registry settings are not used. Instead, the defaultCustomerProfile value is used to create the B2C customer data when an order is submitted.

## Release Notes for Release 4.2.2

**QAD CSS Version:** 4.2.2

**Release Date:** September, 2007

**MFG/PRO Compatibility:** MFG/PRO eB2 SP8+ and eB2.1; QAD Enterprise Applications 2007 (QAD 2007)

**Note** Effective with Service Pack 5, MFG/PRO eB2.1 has been renamed QAD 2007. Release Notes references to MFG/PRO also apply to QAD 2007.

**Related Documentation:** *Implementation Guide: QAD Customer Self Service* (item 78-0627C); *Administration Guide: QAD Customer Self Service* (item 78-0619C); *Installation Guide: QAD Customer Self Service* (item 78-0638C)

These release notes describe the most significant changes and fixes introduced with this version of QAD CSS.

### New and Changed Features

- 1 When the *confirmedOrders* registry setting is No, payment transactions by credit card are no longer processed. Once the sales order is confirmed, the CSR needs to manually process the payment transaction to create a credit card transaction record.
- 2 B2B or B2C users can now add selected items to the shopping cart all at once on the Order Entry page. Previously, they could only add one item at a time.
- 3 The CSS report print function now supports Microsoft Internet Explorer 5.0 and above.

### Corrections to Existing Features

- 1 The system no longer displays the Progress message `ERROR: Query failed get first` when you perform searches in CSS.
- 2 The system has been modified to display the Credit Card Details page correctly when the credit card type or credit card vendor is not set up.
- 3 You can now save credit card vendor details in Credit Card Vendor Maintenance without any credit card type defined. Previously, a Progress error would display.
- 4 During credit card processing, when QAD CSS fails to communicate with the payment processing server, related sales orders are no longer created in MFG/PRO.
- 5 Submitted orders are no longer displayed in Uncommitted Orders Report.
- 6 The system has been modified to process configured items correctly. Previously, sales orders containing configured items could not be properly created in MFG/PRO.
- 7 QAD CSS has been modified to CIM load sales orders to MFG/PRO for customers on credit hold when Hold Orders Over Credit Limit is No in MFG/PRO Sales Order Control (7.1.24) and Verify GL Account is Yes in Domain/Account Control (36.1).
- 8 A sales order CIM load failure caused by untrimmed spaces in the ship-to address has been fixed.
- 9 Mail issues related to the UNIX Sendmail e-mail type have been fixed.
- 10 The system has been modified to display the item feature page correctly when the item is configurable.

- 11 The system can now delete sales quotations completely without leaving behind orphan records that may cause duplicate key errors.
- 12 Item configuration issues caused by special characters in mandatory features of configured items maintained in MFG/PRO have been fixed.
- 13 Customer upload now works correctly for all fields.
- 14 The system now correctly displays line-item price, extended price, and line total on the Finish Order page when a price list is associated with the ship-to address.
- 15 The system has been modified to correctly set base currency, calculate prices, and process sales orders properly in a multi-domain, multi-currency environment.
- 16 The system now displays a warning message when you enter an existing PO number during order entry. Previously, no warning message was shown when a unique PO number was required but duplicate PO numbers existed.
- 17 Issues relating to the closing of the pop-up windows in Item Import and Customer Import have been fixed.
- 18 The installation script has been modified to generate a compile list correctly during installation of QAD CSS 4.2.1 on Windows.
- 19 The extended price calculation difference between QAD CSS and MFG/PRO due to a pricing decimal limit in QAD CSS has been resolved.
- 20 The system has been modified to correctly calculate configured item prices in sales orders when the *ConfirmOrder* registry setting is No.

# Release Notes for Release 4.2.1

**QAD CSS Version:** 4.2.1

**Release Date:** July, 2006

**MFG/PRO Compatibility:** MFG/PRO eB2 SP8 through SP11; eB2.1 SP2 through SP4

The following fixes and changes are included in this release and may require additional configuration and installation changes depending on your system configuration.

## Documentation Updates

*Installation Guide: QAD Customer Self Service (78-0638C)* has been updated for this release. This version of the guide includes the required upgrade information for moving from previous releases of QAD CSS to version 4.2.1.

## New Features

- 1 A new Credit Card Transaction Report has been added to the Administration Reports available on the Administration Menu. To use this report, the setting for maintaining the transaction history log must be enabled in Credit Card Vendor Maintenance.
- 2 You can now use the new EX072 e-mail event to let designated system administrators know when the proper Global Tax Management (GTM) setup does not exist in MFG/PRO.

| Event ID | Event Name    | Subject                           | Event Status | Send Copy to User | Send Copy to CSR | Body                                                                                                                                                                                                                                                                                                                             |
|----------|---------------|-----------------------------------|--------------|-------------------|------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| EX072    | Tax - Warning | QAD CSS Tax environment not found | Yes          | No                | Yes              | Sales Order for [@orderNum] on [@eventDate] does not include actual tax values. This is due to unavailability of corresponding tax environment setup.<br><br>Please contact the Customer Support Administrator.<br><br>Temp Load input file: [@TransFile]<br>Temp Load output file: [@TransFileOut]<br>Warnings:<br>[@LoadError] |

## Corrections to Existing Features

- 1 A number of corrections have been made to ensure that sales quotes and orders are loaded correctly in all circumstances including the following:
  - Orders are in non-US English.
  - Special characters are used in input fields.
  - Optional pop-ups are enabled such as adding items to the installed base.
  - Comments are added to the order before loading into MFG/PRO.
  - A new address is created and optional pop-ups such as time zone and self-billing are enabled in Customer Address Maintenance.

- 2 An error has been corrected that prevented e-mail from being sent even though the e-mail server was properly set up.
- 3 When a record is modified from a page in a browse, the browse now redisplay the same page. Previously, the browse displayed page 1, even though the modified record was accessed from a different page.
- 4 When menus are generated, you can reorder menus as needed. However, Customer Selection must always be the last item on the menu listing or the generation fails. A message now displays the specific cause of this error.
- 5 Prices on the Invoice History Report now correctly display in the currency associated with the customer generating the report when the customer's currency is not the base currency.
- 6 The display font used for country and county in shipping and address fields is now the same.
- 7 The copyright year has been updated to reflect the current year.
- 8 A B2C user will now receive an e-mail with a temporary password when they provide the correct answer to the secret question. Previously, this feature only worked for B2B users.
- 9 The customer lookup in User Maintenance now displays only customers defined in QAD CSS.
- 10 The length of the phone number field on the Address Setup screen is now limited to 16 characters to conform to the acceptable length in MFG/PRO.
- 11 Performance of CIM has been improved.
- 12 When freight terms are associated with the default customer in MFG/PRO, new customers created based on the default now inherit the default freight terms.
- 13 An error in the menu system that prevented a page from displaying during Order Entry 3 has been corrected.
- 14 A Javascript error that could display in Detail Menu Button Maintenance when the button order was changed has been corrected.
- 15 The active link for UPS in QAD CSS shipping documents has been corrected to point to the correct URL.
- 16 When the item number search function is invoked on the Order Entry 1 page, the system now returns the correct value even if a space is added to the end of the item number.
- 17 You can now include a space in the list of valid credit card types in Credit Card Vendor Maintenance. Previously, if you used a space to separate values, they would not display on the Online Processing page during order processing.
- 18 Performance in lookups has been enhanced.
- 19 Search behavior in most maintenance functions has been corrected. Blank search now behaves as expected and returns all records.
- 20 Display issues that occurred when a B2C user logged in to a B2B environment and vice versa have been fixed.
- 21 Selecting an item from the lookup on the To Item field in Order By Item Report now works correctly.
- 22 The User Master Report now works properly when the Show Customers option is selected and a large number of user records exist.

- 23 The system now correctly assigns a number to an order created in QAD CSS when Sales Order Control (7.1.24) is temporarily locked in MFG/PRO. This situation happens only when the system has been set up to derive numbers from MFG/PRO (*UseERPOrderNumber* is Yes in QAD CSS system registry).
- 24 When you disable the *ShowExtendedPrices* registry settings, prices are now properly suppressed in the shopping cart from Order Entry 2.
- 25 When Address Verification is enabled in Credit Card Vendor Maintenance, the AVS data is properly sent to MFG/PRO and stored with the transaction.
- 26 When a customer orders an item in QAD CSS and no available inventory is found at the customer site, the system will now locate inventory at the item master site and successfully create a quote.
- 27 When a customer has unique bill-to and ship-to addresses defined in MFG/PRO, the proper ship-to address now displays on the confirmation screen during order entry.
- 28 A problem that occurred when you attempted to add a new contact cross-reference in Administration Menu|Contact Cross-Reference has been fixed
- 29 The length of the item number field displayed when an e-mail confirmation is sent for an order (E-mail event EX001) has been increased from 8 characters to 18, to correspond to the maximum item number length in MFG/PRO. In addition, a problem sending this event in an MFG/PRO eB2.1 environment because of a missing domain value has been corrected.
- 30 A fully shipped and invoiced order now always displays with a blank status when viewed by a customer in QAD CSS. Previously, if the order was on hold (action status of HD), the status field was not cleared even after the order fully shipped.
- 31 An internal error that generated a message about a missing program in the Web server log file has been corrected.
- 32 A problem related to the default country that occurred when editing bill-to and ship-to customers in the Address Book page has been corrected.
- 33 A problem that prevented a user from generating output using the Uncommitted Orders Report or Order Archive Report has been corrected.
- 34 A problem with assigning a data source to a new user that already is associated with a customer in User Maintenance has been fixed.
- 35 A number of problems related to pricing items in QAD CSS when discount price lists apply have been fixed.
- 36 A problem displaying currency amounts for prices in the catalog when the currency format is not American has been corrected.
- 37 An issue submitting orders that include comments added on the Finish Order screen when Trade Management is being used has been corrected.
- 38 A number of minor format corrections have been made to the System Registry Report.
- 39 A problem that could occur during extraction of data for Customer Load when a range of customer IDs was specified has been corrected.
- 40 The Update Ship-To field has been removed as an option in Order Control Maintenance. The integration between MFG/PRO and QAD CSS does not support modification of ship-to address data stored in MFG/PRO, only creation of new records. A number of other problems that could occur when the ship-to address was changed on an order during order-entry have been corrected.

- 41 When data fails to load into MFG/PRO, selected users are now properly notified by e-mail so that they can take corrective action.
- 42 In previous versions of QAD CSS, if you changed the ship-to address on an order to a non-taxable address and the original ship-to was taxable, the order quote was not regenerated. This could lead to misleading order totals. QAD CSS now regenerates the quote when the ship-to address is changed.
- 43 The e-mail message generated by the system when a user logs in and event EX031 is enabled now includes the user name, rather than the user ID.
- 44 This release ensures that taxes are calculated correctly when the integrated MFG/PRO system is using Quantum's Vertex tax system.
- 45 Non-standard submit behavior has been corrected in the Customer Credit Report.
- 46 This release fixes a problem that occurred loading sales orders into MFG/PRO when Trade Management was installed.
- 47 This release ensures that the correct ship-to address displays in the e-mail generated by e-mail event EX001 when the ship-to and bill-to addresses are the same.
- 48 This release fixes a problem with creating new customer associations.
- 49 QAD CSS pages now display correctly when using Netscape Navigator as the browser.

## **Additional Notes and Corrections to the Documentation**

When defining a credit card vendor in Credit Card Vendor Maintenance, you need to specify the fully qualified path to the directory containing the executable programs required for sending credit card transactions in the Path to a Processing Program directory field. Note that the system assumes the final component of the path is a directory named `/bin` and appends `/bin` to the path you enter in this field. This additional note will be added to the next revision of *Implementation Guide: QAD Customer Self Service* when the book is republished.

# Release Notes for Release 4.2

**QAD CSS Version:** 4.2

**Release Date:** September, 2005

**MFG/PRO Compatibility:** MFG/PRO eB2 SP9 and eB2.1 SP2 and SP3

The release of QAD CSS 4.2 removes all known limitations in terms of integration with MFG/PRO standard functionality and MFG/PRO currently supported versions. With this release, QAD CSS becomes fully compliant with MFG/PRO eB2 and eB2.1. This release also adds enhancements to support available to promise (ATP) functionality, credit card processing, security, and security reporting.

The following documentation has been updated for this release:

- *Installation Guide: QAD Customer Self Service (78-0638A)*
- *Implementation Guide: QAD Customer Self Service (78-0627C)*

## 1 MFG/PRO and QAD CSS Integration

A number of optional features in MFG/PRO affect the fields and frames that display in Sales Order Maintenance (7.1.1). QAD CSS now integrates correctly with MFG/PRO when any of the following optional features are enabled:

- Logistics Accounting
- Customer Consignment Inventory
- Customer Reserved Locations
- Shipment Performance
- Container and Line Charges

For details, see “MFG/PRO and QAD CSS Integration” on page 20.

## 2 Available to Promise (ATP)

Order processing can now be controlled based on the projected quantity available to promise (ATP) for sales order line items.

For details, see “Available to Promise (ATP)” on page 20.

## 3 Security Enhancements

Program pages are now secured from unauthorized access through entering a page URL. Two new security reports support this enhancement and an existing report provides additional security-related details. For details, see “Security Enhancements” on page 25.

## 4 Credit Card Enhancements

Credit card processing is now able to manage authorization and delayed capture as separate transactions. The Credit Card Menu now replaces the previously named Storefront Integration Menu.

Implementing these enhancements requires modifications to MFG/PRO that are included on the QAD CSS CD in version and service-pack specific directories. *Installation Guide: QAD Customer Self Service* describes the steps necessary to use these enhancements.

For details, see “Credit Card Enhancements” on page 26.

## 5 Enhanced Reporting

The Order Tracking Report and the Internal Order Tracking Report now provide additional information relating to lot or serial number associated with shipped items. Promised date and/or due date information can now be provided on 14 external and internal reports relating to orders.

For details, see “Enhanced Reporting” on page 27.

New security reports are available. For details, see “Security Reports” on page 26.

## MFG/PRO and QAD CSS Integration

The data load from QAD CSS now populates the proper MFG/PRO fields with the appropriate values when the following sales order maintenance features are enabled:

- Logistics Accounting
- Customer Consignment Inventory
- Customer Reserved Locations
- Shipment Performance
- Container and Line Charges

This assumes that, for the enabled functionalities in MFG/PRO, you have set the appropriate defaults in all fields that require an input value.

When these features are not being used in MFG/PRO, any associated frames or pop-ups are skipped during the QAD CSS data load, which proceeds to populate the fields in the remaining frames.

In the case of Shipment Performance, sales orders initiated from QAD CSS are created in MFG/PRO with a blank line-item category. If you want a different category to be used, you must manually edit the sales order in Sales Order Maintenance (7.1.1) before initiating the shipment.

## Available to Promise (ATP)

QAD CSS now works in conjunction with ATP functionality introduced in MFG/PRO eB2. Using a combination of new registry settings in QAD CSS, you can take advantage of ATP calculations to let shoppers know whether inventory is available to fill their orders before the order is submitted.

You can also take advantage of promise date (delivery date) calculations based on the setup of delivery transit times in MFG/PRO. If you do not have delivery transit times available, you can continue to use the due date for calculating availability for shipment. You can configure which dates display in the product catalog, shopping cart, and order summary pages.

If you have defined ATP enforcement levels in MFG/PRO, QAD CSS now recognizes those levels and appropriately creates errors or warnings when shoppers submit orders that cannot be fulfilled on the due date.

Since ATP enforcement level check applies only to confirmed orders in MFG/PRO, QAD CSS now provides more control over whether orders are entered into MFG/PRO as confirmed or unconfirmed.

**Note** Regardless of the setting for confirmed orders in QAD CSS, ATP calculations occur during order entry in QAD CSS when ATP enforcement is enabled.

ATP features in QAD CSS take advantage of ATP features in MFG/PRO; however, additional features are provided in the Web order-entry system to accommodate the need for shoppers to have information about availability in real time.

## Determining Confirmed Orders

In MFG/PRO, orders are entered as confirmed when Confirmed Orders is Yes in Sales Order Control (7.1.24). In previous versions of QAD CSS, the Submit Confirmed setting in QAD CSS Order Control determined if orders were entered as confirmed. This version no longer uses the setting in QAD CSS Order Control Maintenance (Administration Menu|System Control Menu|Order Control).

In this version, you can use a new *confirmedOrders* registry setting to determine if orders are entered as confirmed based on user ID, customer ID, security group, customer group, or marketing group, or as a global setting.

## Requesting a Delivery Date

In QAD CSS 4.1.4, you could use the combination of three registry settings to control the display of information in the Available column in the product catalog. These settings access the standard MFG/PRO Sales Order Control settings to determine quantity on hand (QOH) for the default site or all sites, and to display the actual quantity or a text message indicating availability.

In CSS 4.2, you can continue to use the settings introduced in version 4.1.4. However, you can now let shoppers request the earliest possible available date (either ship date or delivery-to-customer date) for a requested quantity based on ATP calculations or QOH calculations.

**Note** ATP calculations only work for the default site; if you plan to implement ATP features, your QOH settings should also reference the default site, not all sites.

To let users request a delivery date, a new Delivery button can be displayed in the following places:

- Beside the Add button for each item in the product catalog
- Beside the Add button in the express order cart
- Beside the Delete button for each order line on the shopping cart

The display of this button is controlled by a new *showDeliveryIcon* system registry setting with the following values:

Yes: The Delivery button displays.

No: The Delivery button does not display.

**Note** This feature can be used even when ATP enforcement has not been enabled in MFG/PRO. The way dates and quantities are calculated varies as described in the following sections.

## Calculating Quantities

MFG/PRO supports two methods of calculating availability:

- Standard quantity-on-hand calculation
- Expanded available-to-promise calculation based on control settings and item setup

If you have done the setup required for ATP enforcement calculations, QAD CSS now determines quantities by executing the same ATP calculations that occur in MFG/PRO ATP Enforcement Check (7.1.19.2). ATP applies when:

- ATP Enforcement Enabled is Yes in MFG/PRO Sales Order Control (7.1.24).
- ATP Enforcement Level is Warning or Error for the item/site combination in MFG/PRO Item-Site Planning Maintenance (1.4.17) or for the item in Item Master Maintenance (1.4.1).

**Note** Regardless of the setting of ATP Enforcement Enabled, standard calculations are always used to determine quantities for configured items, family items, and for items in an Enterprise Material Transfer (EMT) transaction.

## Calculating Dates

Your QAD CSS system can interact with three dates associated with a sales order in MFG/PRO:

**Required Date.** This is the date the shopper wants to have the items. If not specified, it is assumed to be the earliest possible date, which is today. In QAD CSS, this date is referred to as the *request date*.

**Due Date.** This is the date the order will be ready to ship from your shipping dock. In MFG/PRO the system calculates the default due date by adding the shipping lead time from Sales Order Control (7.1.24) to the order date. Due date is an important factor in many internal MFG/PRO calculations such as Material Requirements Planning (MRP). In QAD CSS, this date is also referred to as the *ship date*.

**Promise Date.** This is the date that items are expected to arrive at the shopper's location. MFG/PRO can calculate this date when Calculate Promise Date is Yes in Sales Order Control and data has been defined in Delivery Transit Time Maintenance (2.16.1). In QAD CSS, this date is also referred to as the *delivery date*.

When a user clicks the Delivery button, QAD CSS calculates either a ship (due) or delivery (promise) date based on how you have configured your MFG/PRO system:

- When Calculate Promise Date is No and a shopper clicks the Delivery button on the product catalog page, a message displays about the ship date (due date) for the requested quantity. Promise Date fields in the shopping cart—if displayed—are blank.
- When Calculate Promise Date is Yes and a shopper clicks the Delivery button on the product catalog page, a message displays about the delivery date (promise date) for the requested quantity. Promise Date fields on the shopping cart display the delivery date (promise date), calculated as the request date plus the shipping lead time plus transit time.

You can choose which dates to display on the shopping cart and the Finish Order pages using QAD CSS registry settings. Promise date can be displayed based on the following new settings:

- *showPromDate* determines whether to display the promise date in the order header.
- *showLinePromDate* determines whether to display the promise date for each order line item.

These new settings correspond to the existing settings for *showReqDate* and *showLineReqDate*, which have the same effect for the request date.

**Important** Since Promise Date fields have a value only when Calculate Promise Date is Yes in Sales Order Control, you should not enable these settings unless MFG/PRO is set up to calculate promise dates.

A new CSS registry setting *setReqDate* can be used to set the default value of the request date in the shopping cart to either the promise date (when Calculate Promise Date is Yes) or due date (when Calculate Promise Date is No). When *showReqDate* and *showLineReqDate* are Yes, an Apply All button displays beside the header Request Date field. This lets users apply the header Request Date to all order lines.

## Displaying Messages

When a shopper clicks the Delivery button, the system returns one of three possible messages about item availability based on either the standard or ATP calculation method.

- A message indicating the ship date—when Calculate Promise Date is No—or delivery date—when Calculate Promise Date is Yes

- A message indicating the maximum quantity that could be delivered on the ship or delivery date for partial availability
- A message indicated no availability

**Note** Message content is affected by whether the QAD CSS registry setting for *confirmedOrders* is Yes and whether you are on the shopping cart page or a different page. If the order is submitted unconfirmed (that is, *confirmedOrders* is set to No), the messages indicate that this is an estimated date. Instead of stating that items can be delivered *on* a particular date, the message states they can be delivered *around* that date.

## Product Catalog

The messages in the following table are displayed in the product catalog when *confirmedOrders* is Yes.

| Calculation Method | Calculate Promise Date | Date Used                                            | Possible Message                                                                                                                                                                                                                                                                                                                                                                                               |
|--------------------|------------------------|------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Standard           | No                     | Due Date<br>xx/xx/xx<br>Request Date<br>yy/yy/yy     | <b>Ship</b> date for the requested quantity of # item xxx is xx/xx/xx.<br>A maximum quantity of # item xxx can be <b>shipped</b> on yy/yy/yy. Please contact Customer Service for further information.<br>This item is currently not available. Please contact Customer Service for further information.                                                                                                       |
| Standard           | Yes                    | Promise Date<br>xx/xx/xx<br>Request Date<br>yy/yy/yy | <b>Delivery</b> date for the requested quantity of # item xxx is xx/xx/xx.<br>A maximum quantity of # item xxx can be <b>delivered</b> on yy/yy/yy. Please contact Customer Service for further information.<br>This item is currently not available. Please contact Customer Service for further information.                                                                                                 |
| ATP                | No                     | Due Date<br>xx/xx/xx<br>Request Date<br>yy/yy/yy     | <b>Ship</b> date for the requested quantity of # item xxx is xx/xx/xx.<br><b>Ship</b> date for the requested quantity of # item xxx is xx/xx/xx. A maximum quantity of # item xxx can be <b>shipped</b> on yy/yy/yy. Please contact Customer Service for further information.<br><b>Ship</b> date for the requested quantity of # item xxx is xx/xx/xx. Items are not available before yy/yy/yy.               |
| ATP                | Yes                    | Promise Date<br>xx/xx/xx<br>Request Date<br>yy/yy/yy | <b>Delivery</b> date for the requested quantity of # item xxx is xx/xx/xx.<br><b>Delivery</b> date for the requested quantity of # item xxx is xx/xx/xx. A maximum quantity of # item xxx can be <b>delivered</b> on yy/yy/yy. Please contact Customer Service for further information.<br><b>Delivery</b> date for the requested quantity of # item xxx is xx/xx/xx. Items are not available before yy/yy/yy. |

## Shopping Cart

The effect of the Delivery button on the shopping cart is similar to the product catalog but adds even more features by letting a shopper try out different dates and quantities and then choose to accept the calculated results. The same messages can display, but they are followed by an Accept link.

On the shopping cart, the user can change the request date and click the Delivery button to see how the change affects quantity and delivery date. When the request date is sooner than the delivery date, messages like the following display:

Delivery date for the requested quantity of 10 item A500 is 08/15/05. Accept  
Maximum Quantity of 8 item A500 can be delivered on 08/10/05. Accept

When the shopper clicks the Accept hyperlink at the end of the first message, the system changes the request date of the order to the earliest possible promise date. Clicking the Accept hyperlink at the end of the second message changes the ordered quantity to the maximum quantity available on the request date.

## ATP Enforcement Level

When a shopper first displays the shopping cart page or clicks Submit Order on the Finish Order page, QAD CSS executes the same ATP calculations that occur in MFG/PRO when ATP Enforcement Enabled is Yes in MFG/PRO Sales Order Control (7.1.24).

The system determines the ATP enforcement level for the item based on how it is set up in MFG/PRO Item-Site Planning Maintenance (1.4.17) or Item Master Maintenance (1.4.1), and proceeds accordingly.

- When level is None, the shopper can submit the order regardless of availability.
- When level is Warning, a warning message displays, but the shopper can submit the order.
- When level is Error, an error message displays, the Check Out button is disabled, and the order cannot be submitted.

The same ATP enforcement validation occurs again during the order transmission to MFG/PRO, in case quantities have changed in the MFG/PRO database. If warnings or errors occur, an e-mail event is generated to the Customer Service Representative (CSR). When the ATP enforcement level is Error, the order fails to load and is not created in MFG/PRO.

## New Registry Settings

| Key              | Default | Usage                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
|------------------|---------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| confirmedOrders  | Yes     | This setting determines if orders are entered as confirmed.                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| setReqDate       | No      | <p>This setting determines the default value of the request date when the shopping cart first displays.</p> <ul style="list-style-type: none"> <li>• Yes, and promise dates are being calculated in MFG/PRO: Order line request date defaults from the calculated order line promise date.</li> <li>• Yes, and promise dates are not being calculated in MFG/PRO: Order line request date defaults from the calculated order line due date.</li> <li>• No: Order line request dates are blank.</li> </ul> |
| showDeliveryIcon | Yes     | <p>This setting determines whether the Delivery button is displayed beside the following buttons:</p> <ul style="list-style-type: none"> <li>• Add button for each item on the product catalog</li> <li>• Add button in the express order cart</li> <li>• Delete button for each line in the shopping cart</li> </ul> <p>The setting values are Yes or No.</p>                                                                                                                                            |
| showLinePromDate | Yes     | This setting determines whether the promise date is shown for each order line item on the shopping cart and the Finish Order pages. The setting values are Yes or No.                                                                                                                                                                                                                                                                                                                                     |
| showPromDate     | Yes     | <p>This setting determines whether the promise date is shown in the order header on the shopping cart and on the Finish Order pages. When the promise date varies per line, the header promise date shows the latest promise date for all lines on the order.</p> <p>If you want shoppers to see different dates for each line, set <i>showLine PromDate</i> to Yes.</p>                                                                                                                                  |

## Modified Registry Settings

| Key               | Default     | Usage                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
|-------------------|-------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| showDueOrPromDate | PromiseDate | This setting determines which dates, if any, display on the order-related reports that can be viewed by customers as well as the order summary page that displays during checkout.<br><br>PromiseDate: Promise date displays.<br><br>Both: Both dates display.<br><br>None: No dates display.<br><br>(Any other value): Due date displays.                                                                                                                                                                                                                                                                                                                                                               |
| showReqDate       | Yes         | This setting determines whether an updateable Request Date field displays in the order header on the shopping cart and the Finish Order pages. The setting values are Yes or No.<br><br>When this field is Yes and <i>showLineReqDate</i> is No, the header request date applies to each line on the order and cannot be changed.<br><br>If you want shoppers to be able to change the date for each line, set <i>showLineReqDate</i> to Yes.<br><br>When <i>showReqDate</i> and <i>showLineReqDate</i> are Yes, an Apply All button displays beside the header Request Date field. This lets users apply the header Request Date to all order lines.                                                    |
| showLineReqDate   | No          | This setting determines if a field displays next to each item in the shopping cart so the buyer can specify a request date. Values are: <ul style="list-style-type: none"><li>• No: Line item request dates are not entered. <i>showReqDate</i> is typically Yes in this case.</li><li>• Yes: Line item request dates are entered. The <i>showReqDate</i> field is typically set to No. However, when both <i>showReqDate</i> and <i>showLineReqDate</i> are Yes, an Apply All button displays beside the header Request Date field. This lets users apply the header Request Date to all order lines.</li><li>• Required: Same as Yes but input of the field is mandatory during order entry.</li></ul> |

## Security Enhancements

Additional security features now prevent a user from bypassing menu security to access an unauthorized page. In addition, two new security reports are available and security information has been added to an existing report.

### Security Groups

Previously, users who currently have a valid QAD CSS session could access some programs directly from the browser Address bar by entering a page URL. Since this method bypassed the QAD CSS menus, a user could access a restricted page. Changes to QAD CSS security now let system administrators restrict a parent page and all its subordinate pages, regardless of how it is accessed.

To support this enhancement, the following changes have been made to Detail System Module Maintenance (Administration Menu|System Control Menu|System Module Maint):

- The existing Parent Page field is now a text box where you can enter or modify the parent pages of the current program page. Default data for parent-child relationships in the system is loaded during installation of QAD CSS 4.2.
- A new Security Required field indicates whether access to the current program page is restricted
- A list of security groups displays to indicate which security groups have access to the current program page. These groups were assigned access to the parent page in Administration|Menu Maintenance. Changing the security groups in Detail System Module Maintenance is possible but not recommended.

## Security Reports

The existing Module Report has been updated to include a new column that indicates for each module if access is needed.

A new Module Security Report (Administration Menu|Administration Reports|Module Security Report) lists security groups associated with all modules that require security protection.

Another new Module Hierarchy Report (Administration Menu|Administration Reports|Module Hierarchy Report) displays information about the modules according to their place in the parent-child hierarchy in an indented listing. The parent modules are shown at the left side and the child modules on the right side of the report.

## Credit Card Enhancements

### Credit Card Menu

In MFG/PRO, the Storefront Integration Menu (7.21) has been renamed Credit Card Menu to include QAD CSS credit card transactions. The term Storefront has also been removed from the menu items and replaced by the term Credit Card. The 7.21 menu now appears as shown below:

| Menu Number | Description                    |
|-------------|--------------------------------|
| 7.21        | Credit Card Menu               |
| 7.21.1      | External Address X-Ref Browse  |
| 7.21.2      | Credit Card Transaction Browse |
| 7.21.3      | Credit Card Sales Order Browse |
| 7.21.24     | Credit Card Control            |

MFG/PRO menus will be updated to reflect these changes during installation of QAD CSS 4.2 if necessary.

### Credit Card Processing

If you are implementing credit card processing with QAD CSS, a new *creditCardTransType* registry setting lets you determine how processing is managed:

- The sale process applies when merchants or manufacturers are able to take an order and ship the ordered item the same day.
- The authorization and delayed capture process takes place in two phases. Authorization takes place when the shopper submits an order and enters billing information. After the order is accepted and shipped in MFG/PRO, fund capture or settlement takes place during invoice post.

The system creates a credit card history record associated with the sales order submitted to MFG/PRO.

**Note** If a credit card does not receive an authentication code, the order is not submitted to MFG/PRO.

In MFG/PRO, Invoice Post (7.13.4) has been enhanced to:

- Create the capture transaction and send the capture transaction to the credit card processing service.
- Create a credit card transaction history record for the capture transaction.
- Create an accounts receivable payment record for credit card transactions from both the sale process and the delayed capture process.

Throughout the sales order cycle in MFG/PRO, the system performs the following validations on orders paid by credit card:

- The credit card has not expired.
- The total amount of the order does not exceed the authorized amount.
- The current date is not after the authorized date.

Six programs perform credit card validations. The first three in the following list validated credit card information in previous releases; the last three have been enhanced in QAD CSS 4.2:

- Sales Order Shipments (7.9.15)
- Pending Invoice Maintenance (7.13.1)
- Pre-Shipper/Shipper Confirm (7.9.5)
- Picklist/Pre-Shipper–Automatic (7.9.1)
- Pre-Shipper/Shipper Workbench (7.9.2)
- Invoice Post (7.13.4)

## Enhanced Reporting

On the Order Tracking Report and the Internal Order Tracking Report, QAD CSS users can choose to display the lot or serial number associated with each item shipped on an order. To support this function, a new Show Lot/Serial Numbers Shipped check box is provided on both reports (Order Menu|Account Information|Order Tracking, and Order Menu|Internal Order Reports|Order Tracking INT). For this function to work, Lot/Serial Control must be set to either L for Lot or S for Serial in MFG/PRO Item-Site Planning Maintenance (1.4.17) or Item Maintenance (1.4.1).

The promise date and/or due date can be displayed during order entry on the Finish Order page and on the header and order line for the following 14 external and internal reports accessed from the Order Menu|Account Information menu and the Order Menu|Internal Order Reports menu respectively:

- Order Tracking
- Order Summary
- Order Purchase
- Order by Order
- Order by Item
- Order by Customer
- Invoice History Report

To enhance this feature, two new values—Both and None—have been added to the *showDueOrPromDate* setting in the system registry.

## Release Notes for Release 4.1.4

**QAD CSS Version:** 4.1.4

**Release Date:** April, 2005

**MFG/PRO Compatibility:** MFG/PRO eB2, through SP8 and eB2.1 SP2

A number of significant enhancements are included in this release and may require additional configuration and installation changes depending on your system configuration. The release notes provide an overview of major enhancements. For a list of ECOs included in this release, see the file `CSS 4.1.4 ECO List` on the product CD.

The following documentation has been updated for this release:

- *Installation Guide: QAD Customer Self Service (78-0618C)*
- *Administration Guide: QAD Customer Self Service (78-0619B)*
- *Implementation Guide: QAD Customer Self Service (78-0627B)*

QAD CSS 4.1.4 includes the following major enhancements:

- 1 This release of QAD CSS is fully compatible with the Shared Services Domain eB2.1 release of MFG/PRO. See “Integration with MFG/PRO eB2.1” on page 29 for details. Updates to accommodate multiple domains in the MFG/PRO eB2.1 database have affected the installation steps for QAD CSS and also require that users perform a conversion.

**Note** To support MFG/PRO eB2.1 integration, a number of changes have been made to the QAD CSS code base that may affect customizations. Customers with customizations should review the interfaces to procedures in the extension layer to see if any parameters have changed. To update customizations, you may want to contact QAD Services for assistance.

- 2 This release includes support for using QAD CSS with an MFG/PRO system that is integrated with Trade Management (TrM). TrM customers must first be set up correctly in QAD CSS; therefore, TrM can be used only for business-to-business (B2B) order processing, not for business-to-consumer (B2C) since B2C lets undefined users order items. In addition, the bonus stock and manual price list features of TrM in sales orders are not supported for orders generated in QAD CSS.

The following combinations of MFG/PRO and TrM versions have been certified:

- MFG/PRO eB2 SP8, TrM 2.6 SP1
- MFG/PRO eB2.1 SP2, TrM 2.7

See “Integration with Trade Management” on page 30 for details.

**Important** If you plan to use QAD CSS with TrM, you must also download and install ECO P2YY.

- 3 This release includes support for using QAD CSS with an MFG/PRO system that is integrated with European Accounting (EA).

**Note** While both EA and TrM integration are supported in this release, only one can be used at a time. MFG/PRO does not currently support using both European Accounting and Trade Management in the same database.

See “Integration with European Accounting” on page 32 for details.

- 4 A new system registry setting has been added to manage the display of inventory amounts in the product catalog. The `runGetWhseQty` setting affects the display of quantity for the default site and for all sites.

See “Managing Inventory Display with `runGetWhseQty`” on page 33 for details.

- 5 A new system registry setting has been added to let you choose between the display of promise date or due date in the order summary during check out and in various order-related reports. The *showDueOrPromDate* setting affects the date display during check out and in the following reports:
- Packing Slip Reprint
  - Order Tracking
  - Order Summary
  - Order by Order Report
  - Order by Item Report
  - Invoice History Report
- 6 A number of changes have been made to QAD CSS to ensure that it properly handles the unavailability of WebSpeed or the MFG/PRO database. This might happen due to network problems or planned backups. For WebSpeed issues, errors are captured and displayed to the user. Details on how to set this up are included in the installation guide.
- Note** When the Web server is down, the standard browser error displays indicating the page cannot be found.
- When QAD CSS is available but MFG/PRO is not, some functions cannot be used. Users attempting to run most order-related reports will receive an error page, indicating that the report cannot be run and they should try again later. Users can browse the QAD CSS catalog, but they cannot add items to the shopping cart or check out. Either buttons are disabled or appropriate messages display.
- Once MFG/PRO is running again, QAD CSS must be shut down and restarted to connect properly.
- 7 The *uploadFilePath* registry setting is no longer used for managing files created during Catalog and Customer Load.

## Integration with MFG/PRO eB2.1

QAD CSS is designed so that a single version of QAD CSS can support multiple versions of MFG/PRO using an adapter developed to accommodate the specific requirements of each release. Version 4.1.4 now has an adapter that works with MFG/PRO eB2.1. To accommodate the presence of multiple domains in the eB2.1 database, the concept of data sources has been introduced into QAD CSS.

**Note** While QAD CSS can be used with multiple MFG/PRO versions, one instance of QAD CSS can be used with only one version of MFG/PRO at a time. You cannot connect to both MFG/PRO eB2 and eB2.1 databases simultaneously.

A new Data Source Maintenance function has been added to the Administration|System Control menu. Using this program, you can specify which domains in an MFG/PRO eB2.1 database your QAD CSS instance should be able to interact with.

The ability to interact with domains has affected installation and conversion in an MFG/PRO eB2.1 environment. To connect to an eB2.1 database, you must

- Set the PROPATH correctly during installation to point to the `mfg` directory rather than the `qad` directory.
- Specify a valid domain in the MFG/PRO database you are using with QAD CSS. The first data source record is created based on this domain name during installation and is automatically associated with the demo user. This is required for an administrator to log in and set up the system. You can add additional data sources after logging in to the system.
- Restart WebSpeed after making these changes.

You can then log in to QAD CSS and create additional data sources as required for your specific implementation.

If you are upgrading to QAD CSS 4.1.4 from an earlier release, all existing users must have an associated data source. This is initially set to the domain supplied during installation. If you are using more than one domain, you will need to manually modify user records after you create the additional data sources.

All items and customers must be associated with a data source. Data source has been added to the Catalog and Customer Load functions so that you can specify which domain to load item and customer records into. In addition, the following programs have been updated to include a field for data source:

- Address Maintenance
- Contact Cross-Reference Maintenance
- Customer Maintenance
- Customer Item Maintenance
- Item Types Maintenance
- Special Maintenance
- User Maintenance
- Order Archive Report

When a B2B user logs in to QAD CSS, the system knows which domain to access based on the user's associated customer record. In a B2C scenario when a user is undefined, a default domain must be used. This is determined by checking the domain associated with the record specified for the *defaultCustomerProfile* registry setting. The user's domain determines which items they can view in the catalog. When an administrator logs in, the domain associated with their user ID determines what displays on some of the administrative reports, such as items and customers.

A new system registry setting—*QADUDomain*—is used to determine the domain to use for the administrative user defined for managing the background integration between QAD CSS and MFG/PRO. In MFG/PRO eB2, two settings are needed: *QADUser* and *QADUPasswd*. MFG/PRO eB2.1 databases require the additional *QADUDomain* setting.

## Integration with Trade Management

When TrM is being used with MFG/PRO, items and customers are defined in both MFG/PRO database tables and tables in the TrM database. Customers and items in MFG/PRO are identified as belonging to TrM by having a value for the Promotion Group field. Within TrM, they are further identified by division.

Several changes to the load functions were made to accommodate loading MFG/PRO data with TrM-specific field values:

- The Customer Load selection criteria now includes Promo Group so that it is easy to identify and select TrM customers.
- The Catalog Load selection criteria now includes Division so that it is easy to identify and select TrM items.

When TrM is activated, QAD CSS now manages the following:

- When a user logs in, the system checks to see if the user's associated customer is defined as a TrM customer in MFG/PRO. If so, it stores the value of the customer group, customer promotion group, and division as part of the user's session. It also stores the value of the TrM division currency and uses this rather than the user currency.
- When shoppers identified as TrM customers view the product catalog in QAD CSS, they see only items defined for their division in TrM; only TrM items can be viewed, not both TrM and non-TrM. (If a TrM customer belongs to multiple divisions, the first division is used to determine the catalog displayed.)

- All pricing calculations are done using TrM price lists both in the catalog and in Sales Order Maintenance. If none are available, the price stored in the customer item detail record is used as with standard MFG/PRO pricing.
- The CIM process used to load QAD CSS orders into MFG/PRO has been adjusted for the additional pop-up frames associated with TRM functionality that display in Sales Order Maintenance. Default values are provided so no errors are generated.
- Two new e-mail events can be used to display TrM-specific error conditions.

**Note** The concept of master customers applies to TrM customers as well as non-TrM customers; a TrM customer can be associated with another TrM master customer and view that customer's items, as long as they both belong to the same division.

## Sales Order Processing

Under the following conditions, special TrM processing takes place when a QAD CSS sales order is loaded into MFG/PRO:

- Integrate with TrM is Yes in Sales Order Control (7.1.24).
- The order sold-to address is a TrM customer, indicated by a value in the Promo Group field in Customer Maintenance (2.1.1).
- The order item is defined in TrM by specifying a value for the Promo Group in Item Master Maintenance (1.4.1).
- The sold-to address and item belong to a valid TrM division.
- The division currency of the sold-to is the same as the order currency.
- All items on the sales order belong to the same division.
- TrM price lists have been created; otherwise, standard MFG/PRO pricing is used.

In this case, MFG/PRO uses TrM-specific data from the sales order header and line detail to select applicable TrM-generated price lists using the MFG/PRO best pricing logic. Price lists created in MFG/PRO are not considered.

When a sales order is loaded into MFG/PRO with TrM activated, the following processing occurs:

- The division defaults from the customer sold-to address.
- For B2C customers, the customer division is set to blank so that no special TrM processing can occur.
- Bonus Stock is set to No for all TrM transactions.

Two new events have been added to Email Master Maintenance that are generated during processing of TrM orders:

- When the currency associated with the TrM division is different from the sales order currency, an error prevents the CIM load and an e-mail event is triggered to notify the customer service representative (CSR).
- When a valid exchange rate does not exist during order pricing, a message is sent to the CSR and the system uses the price stored in the QAD CSS customer item detail record (wpro\_cust\_item).

| Event ID | Event Name               | Subject                                           | Event Status | Send Copy to User | Send Copy to CSR | Body                                                                                                                                              |
|----------|--------------------------|---------------------------------------------------|--------------|-------------------|------------------|---------------------------------------------------------------------------------------------------------------------------------------------------|
| Ex067    | TRM CIM Order – Error    | QAD CSS – Error in TRM Order with Currency        | Yes          | no                | Yes              | When attempting to create sales order [ @orderNum], the TRM division currency [ @TRMDivCurr] is different to the sales order currency [ @SOCurr]. |
| Ex068    | TRMExchange Rate – Error | QAD CSS – Error in TRM Pricing with Exchange Rate | Yes          | no                | Yes              | The exchange rate to convert from currency [ @Curr1] to currency [ @Curr2] is missing.                                                            |

## Integration with European Accounting

When European Accounting (EA) is being used, additional information is associated with customers that can affect processing in sales orders and cause new pop-up windows to display. These features are managed by settings in European Accounting Control (26.23) and include:

- VAT Registers
- Suspended VAT
- Correction Invoices

When VAT registers or suspended VAT is enabled, pop-ups display in Customer Maintenance. These affect the way B2C customers are created in MFG/PRO. Since these customers are created in the background, default values must be provided for the EA fields:

- The value for VAT register is derived using Global Tax Management (GTM) data for the ship-from address and the ship-to address.
- The values for the bank and payment method required by EA are derived from European Accounting Control.
- The value for operation code is determined by the value specified for the customer record defined as the *defaultCustomerProfile* registry setting.
- If Use Suspended VAT is Yes in European Accounting Control, the value for a new B2C customer is set to No by default.

## Sales Order Processing

Special processing takes place when a QAD CSS sales order is loaded into MFG/PRO and European Accounting is installed:

- The system checks the value of Use Correction Invoices in European Accounting Control. If this is Yes, it sets the value of Original Invoice to blank so that the new sales order is created as a normal order.
- If Use Suspended VAT is Yes in European Accounting Control, the value for Suspended VAT on the order defaults from the customer sold-to address.
- If VAT Registers is Yes in European Accounting Control, the values for VAT register and operation code default from the customer sold-to address.

**Note** All taxable lines added to the order must have the same VAT register assigned to their associated tax environment or an error is generated. A new message has been added to the system (EX013) to accommodate this situation.

## Managing Inventory Display with *runGetWhseQty*

You can use the new *runGetWhseQty* registry setting to determine how inventory availability displays in the catalog.

**Note** To see these fields in the product catalog, they must be marked for display in Item Layout Maintenance.

The setting of *runGetWhseQty* has three possible values:

Off: Do not perform any calculation. Even if the quantity available has been marked to display in Item Layout Maintenance, no value displays on the screen.

Qty: Check the value of the *runGetAllWhseQty* and *runGetDefWhseQty* settings and display the quantity available based on those settings.

Text: Check the value of the *runGetAllWhseQty* and *runGetDefWhseQty* and display the text contained in one of two configurable messages, indicating that stock is available or unavailable.

When *runGetWhseQty* is set to Qty or Text, two other registry settings determine how the quantity available is determined. The values of *runGetAllWhseQty* and *runGetDefWhseQty* determine if these quantities are found in MFG/PRO or read from values stored in the QAD CSS customer item master (wpro\_cust\_item) table. In QAD CSS, whsQty is read for the default site and the totQty for all sites.

The messages that define the text displayed when the value of *runGetWhseQty* is Text are defined in Error Message Maintenance:

- OP000244 displays when zero or less quantity is available at the default site or in all sites. The text of this message is currently set to Out of Stock, but you can modify it to meet your own requirements. The message text can also display the value of the symbol [*@QtyAvail*] when it is included.
- OP000245 displays when a quantity greater than zero is available at the default site or in all sites. The text of this message is currently set to Available, but you can modify it to meet your own requirements. The message text can also display the value of the symbol [*@QtyAvail*] when it is included.

The combination of these three registry settings provides great flexibility in how you manage and display availability in the catalog. Here are some possible options:

- If you do not want to display availability information, turn off the display in Item Layout Maintenance and set *runGetWhseQty* to Off. This optimizes performance when quantity information is not relevant.
- To display full quantities for each item based on information from MFG/PRO, turn on the field display in Item Layout Maintenance, set appropriate side labels for the fields, set *runGetWhseQty* to Qty, and set both *runGetDefWhseQty* and *runGetAllWhseQty* to Yes.
- To display a message based on availability information from MFG/PRO, choose which inventory to check: either default site or all sites. Then, turn on display for that field only in Item Layout Maintenance, leave the side label blank, set *runGetWhseQty* to Text, and set either *runGetDefWhseQty* or *runGetAllWhseQty* to Yes. The message Available displays when a quantity is available; otherwise, Out of Stock displays. These messages can be modified in Error Message Maintenance.
- To just display a different message—such as Call for availability—for every item in the catalog, turn on the display for default site quantity in Item Layout Maintenance, leave the side label blank, set *runGetWhseQty* to Text, set *runGetDefWhseQty* and *runGetAllWhseQty* to No. Then change both message Op000244 and Op000245 to “Call for availability” in Error Message Maintenance.
- To always display the quantity based on information maintained in QAD CSS (not MFG/PRO), turn on display for either the default site or all sites in Item Layout Maintenance, set appropriate side labels, set *runGetWhseQty* to Qty, and set both *runGetDefWhseQty* and *runGetAllWhseQty* to No.

**Note** The catalog design applies to the entire catalog; you cannot set the display for individual items.

## Release Notes for Release 4.1.3.1

**QAD CSS Version:** 4.1.3.1

**Release Date:** May, 2006

**MFG/PRO Compatibility:** MFG/PRO eB through SP9 and eB2 through SP8

The following fixes and changes are included in this release and may require additional configuration and installation changes depending on your system configuration.

If you are upgrading to 4.1.3.1 from an earlier version of QAD CSS, a conversion is required. See “Upgrading from 4.1.3 to the Current Release” on page 37 for details.

### New Features

You can now use the new EX072 e-mail event to let designated system administrators know when the proper Global Tax Management (GTM) setup does not exist in MFG/PRO.

| Event ID | Event Name    | Subject                           | Event Status | Send Copy to User | Send Copy to CSR | Body                                                                                                                                                                                                                                                                                                                                     |
|----------|---------------|-----------------------------------|--------------|-------------------|------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| EX072    | Tax - Warning | QAD CSS Tax environment not found | Yes          | No                | Yes              | Sales Order for [@orderNum] on [@eventDate] does not include actual tax values. This is due to unavailability of corresponding tax environment setup.<br><br>Please contact the Customer Support Administrator.<br><br>Temp Load input file: [@TransFile]<br><br>Temp Load output file: [@TransFileOut]<br><br>Warnings:<br>[@LoadError] |

### Corrections to Existing Features

- 1 A number of corrections have been made to ensure that sales quotes and orders are loaded correctly in all circumstances including the following:
  - Orders are in non-US English.
  - Special characters are used in input fields.
  - Optional pop-ups are enabled such as adding items to the installed base.
  - Comments are added to the order before loading into MFG/PRO.
  - A new address is created and optional pop-ups such as time zone and self-billing are enabled in Customer Address Maintenance.
- 2 An error has been corrected that prevented e-mail from being sent even though the e-mail server was properly set up.
- 3 When a record is modified from a page in a browse, the browse now redisplay the same page. Previously, the browse displayed page 1, even though the modified record was accessed from a different page.

- 4 When menus are generated, you can reorder menus as needed. However, Customer Selection must always be the last item on the menu listing or the generation fails. A message now displays the specific cause of this error.
- 5 Prices on the Invoice History Report now correctly display in the currency associated with the customer generating the report when the customer's currency is not the base currency.
- 6 The display font used for country and county in shipping and address fields is now the same.
- 7 The copyright year has been updated to reflect the current year.
- 8 A B2C user will now receive an e-mail with a temporary password when they provide the correct answer to the secret question. Previously, this feature only worked for B2B users.
- 9 The customer lookup in User Maintenance now displays only customers defined in QAD CSS.
- 10 The length of the phone number field on the Address Setup screen is now limited to 16 characters to conform to the acceptable length in MFG/PRO.
- 11 Performance of CIM has been improved.
- 12 When freight terms are associated with the default customer in MFG/PRO, new customers created based on the default now inherit the default freight terms.
- 13 An error in the menu system that prevented a page from displaying during Order Entry 3 has been corrected.
- 14 A Javascript error that could display in Detail Menu Button Maintenance when the button order was changed has been corrected.
- 15 The active link for UPS in QAD CSS shipping documents has been corrected to point to the correct URL.
- 16 When the item number search function is invoked on the Order Entry 1 page, the system now returns the correct value even if a space is added to the end of the item number.
- 17 You can now include a space in the list of valid credit card types in Credit Card Vendor Maintenance. Previously, if you used a space to separate values, they would not display on the Online Processing page during order processing.
- 18 Performance in lookups has been enhanced.
- 19 Search behavior in most maintenance functions has been corrected. Blank search now behaves as expected and returns all records.
- 20 Display issues that occurred when a B2C user logged in to a B2B environment and vice versa have been fixed.
- 21 Selecting an item from the lookup on the To Item field in Order By Item Report now works correctly.
- 22 The User Master Report now works properly when the Show Customers option is selected and a large number of user records exist.
- 23 The system now correctly assigns a number to an order created in QAD CSS when Sales Order Control (7.1.24) is temporarily locked in MFG/PRO. This situation happens only when the system has been set up to derive numbers from MFG/PRO (*UseERPOrderNumber* is Yes in QAD CSS system registry).
- 24 When you disable the *ShowExtendedPrices* registry settings, prices are now properly suppressed in the shopping cart from Order Entry 2.

- 25 When Address Verification is enabled in Credit Card Vendor Maintenance, the AVS data is properly sent to MFG/PRO and stored with the transaction.
- 26 When a customer orders an item in QAD CSS and no available inventory is found at the customer site, the system will now locate inventory at the item master site and successfully create a quote.
- 27 When a customer has unique bill-to and ship-to addresses defined in MFG/PRO, the proper ship-to address now displays on the confirmation screen during order entry.
- 28 A problem that occurred when you attempted to add a new contact cross-reference in Administration Menu|Contact Cross-Reference has been fixed.
- 29 The length of the item number field displayed when an e-mail confirmation is sent for an order (E-mail event EX001) has been increased from 8 characters to 18, to correspond to the maximum item number length in MFG/PRO. In addition, a problem sending this event in an MFG/PRO eB2.1 environment because of a missing domain value has been corrected.
- 30 A fully shipped and invoiced order now always displays with a blank status when viewed by a customer in QAD CSS. Previously, if the order was on hold (action status of HD), the status field was not cleared even after the order fully shipped.
- 31 An internal error that generated a message about a missing program in the Web server log file has been corrected.
- 32 A problem related to the default country that occurred when editing bill-to and ship-to customers in the Address Book page has been corrected.
- 33 A number of problems related to pricing items in QAD CSS when discount price lists apply have been fixed.
- 34 A problem displaying currency amounts for prices in the catalog when the currency format is not American has been corrected.
- 35 A number of minor format corrections have been made to the System Registry Report.
- 36 The Update Ship-To field has been removed as an option in Order Control Maintenance. The integration between MFG/PRO and QAD CSS does not support modification of ship-to address data stored in MFG/PRO, only creation of new records. A number of other problems that could occur when the ship-to address was changed on an order during order-entry have been corrected.
- 37 When data fails to load into MFG/PRO, selected users are now properly notified by e-mail so that they can take corrective action.
- 38 In previous versions of QAD CSS, if you changed the ship-to address on an order to a non-taxable address and the original ship-to was taxable, the order quote was not regenerated. This could lead to misleading order totals. QAD CSS now regenerates the quote when the ship-to address is changed.
- 39 The e-mail message generated by the system when a user logs in and event EX031 is enabled now includes the user name, rather than the user ID.
- 40 Non-standard submit behavior has been corrected in the Customer Credit Report.

## **Additional Notes and Corrections to the Documentation**

When defining a credit card vendor in Credit Card Vendor Maintenance, you need to specify the fully qualified path to the directory containing the executable programs required for sending credit card transactions in the Path to a Processing Program directory field. Note that the system assumes the final component of the path is a directory named `/bin` and appends `/bin` to the path you enter in this field. This

additional note will be added to the next revision of *Implementation Guide: QAD Customer Self Service* when the book is republished.

## Upgrading from 4.1.3 to the Current Release

Use the following instructions to upgrade from QAD CSS 4.1.3 to 4.1.3.1 on UNIX, Linux, or Windows platforms. Refer to the installation guide you received with 4.1.3 for any additional details.

### Overview

The steps required to upgrade QAD CSS are:

- Install the new media to your QAD CSS server.

These instructions assume that you are installing to a new location and not overwriting your existing 4.1.3 system. After upgrading and testing the new QAD CSS version, you can switch over to your production system.

- Set up QAD CSS environment values.
- Convert the old database.

The upgrade method supports an in-place conversion of your existing QAD CSS database. You copy it to the 4.1.3.1 installation directory before executing the conversion.

- Compile the QAD CSS code.

### Installing New QAD CSS Media

Complete these steps to install the new QAD CSS media.

- 1 Log on as a user that has permission to execute the installation script and update the installation directories.

- 2 On UNIX systems, mount the CD-ROM. On Windows, place the CD in a CD-ROM drive.

**Note** Copying the distribution files from the CD to a temporary directory on disk can increase extraction speed.

- 3 Launch a command window and change directories to the `install` directory on the CD:

```
cd /install
```

- 4 Launch the installation script in that directory:

```
./install.ksh
```

For Windows, launch `install.exe`.

- 5 A welcome screen displays. Press Enter. Use the following table to enter the appropriate values for script execution.

| Step                           | User Values                                                                                                             |
|--------------------------------|-------------------------------------------------------------------------------------------------------------------------|
| License agreement              | Yes                                                                                                                     |
| Install log file               | Accept default or enter a new location and name                                                                         |
| QAD CSS installation directory | Default is <code>/qadcass</code> ; typically, this should not be the same location as your existing QAD CSS 4.1.3 files |
| File extraction                | None                                                                                                                    |
| Progress directory             | Your Progress install directory                                                                                         |

| Step                      | User Values          |
|---------------------------|----------------------|
| Windows: icon folder name | Default is CSS 4.1.3 |
| Script end                | None                 |

**Note** At the end of the script, the name and location of the installation log file display. Open the log file in a text editor to check for errors.

## Setting Up QAD CSS Environment Values

Before beginning the conversion, you must define some environment variables required by MFG/UTIL.

- 1 Launch MFG/UTIL from the *CSSInstallDir* using the following command:

```
./mfgutil
```

For Windows, launch MFG/UTIL from the icon on the Start menu.

- 2 Select CSS Setup from the Configure CSS menu. Use the following table to update your QAD CSS configuration.

| Field                      | Description                                                                                                                                                                                                       |
|----------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| CSS Database Directory     | This is <i>CSSInstallDir/database</i> by default.                                                                                                                                                                 |
| CSS Install Directory      | The <i>CSSInstallDir</i> defined during install.                                                                                                                                                                  |
| Progress Install Directory | The Progress install directory as identified during the install.                                                                                                                                                  |
| MFG/PRO Install Directory  | The <i>MFGPROInstallDir</i> for the MFG/PRO instance CSS will connect with.                                                                                                                                       |
| WebServer Host Name        | The server name or IP address of the Web server. This should also include a domain name. The <i>.qad.com</i> in the sample screen is the domain name.                                                             |
| WebSpeed Broker Name       | The name of the broker you plan to use; this guide uses <i>qadcsc</i> as an example.<br><b>Important:</b> To preserve your previous 4.1.3 installation of QAD CSS, make sure you specify a different broker name. |
| WebSpeed Broker Port       | Any available port.                                                                                                                                                                                               |

- 3 Choose OK to save the changes.

## Converting the Database

The database conversion is completed using a set of options on the Upgrade CSS menu in MFG/UTIL.

### Conversion Overview

Completing the conversion involves the following activities, represented by options on the MFG/UTIL Upgrade CSS menu:

- 1 Copy your 4.1.3 database to the 4.1.3.1 installation directory.
- 2 Run a script that dumps the data from your 4.1.3 database and converts the data to 4.1.3.1.
- 3 Load the data that was dumped in step 1 into the updated tables.
- 4 Update the version to reflect the QAD CSS 4.1.3.1 release.

**Note** The option Dump Data from Database on the Upgrade CSS menu is currently not required since the data is dumped automatically during the first step.

## Running the Conversion

Use the following procedure to convert your existing QAD CSS database.

- 1 Copy the database to be upgraded from its existing location to the `/database` directory under your QAD CSS 4.1.3.1 installation.
  - a Change your current directory to `CSSInstallDir`.
  - b Use `procopy` to copy your 4.1.3 version database to:  
`CSSInstallDir/database/qadcss`
- 2 Start MFG/UTIL and choose Convert CSS to 4.1.3.1 from the Upgrade CSS menu.
- 3 In the Connect Database screen, connect to the existing CSS database to be converted (the one copied in step 1). The log window displays showing a successful connection.
- 4 The system performs CSS 4.1.3 data conversion and dumps all the `.d` files in the `CSSInstallDir/convdata` directory. When this is complete, choose Close to continue.
- 5 Choose Load Data into Database from the Upgrade CSS menu. In the Connect Database screen, connect to your CSS database.
- 6 In the Load Data Contents screen, use the Browse button to locate the `CSSInstallDir/convdata` directory and choose OK.
- 7 In the Table Selection for Load screen, all the tables are automatically selected. Choose OK.
- 8 The system loads updated data into the database. When this is complete, choose Close to continue.
- 9 Choose Update Product and Version from the Upgrade CSS menu. Enter the correct version name and database name. The version name for the current version is `ex 4.1.3.1`. The database is the QAD CSS database name located in:  
`CSSInstallDir/database`
- 10 The Log Window displays and shows progress. Choose Close.
- 11 Choose File|View Log to view the MFG/UTIL log file and ensure that the conversion completed successfully.

## Compiling QAD CSS Source Code

Make sure that the Web server, AdminServer, NameServer, and Broker are all configured and started properly. Follow these steps to compile the QAD CSS source code from the WebSpeed Workshop:

- 1 Using a Web browser, go to the WebSpeed Workshop by entering the following URL:  
`http://webServer/webServerScriptsDirectory/wspd_cgi.sh/WService=brokerName/workshop`

**Note** The `webServerScriptsDirectory` is typically your Web server `/cgi-bin` directory.  
**Note** In Windows environments, `cgiip.exe` is typically specified rather than `wspd_cgi.sh`.
- 2 Choose File Tools from the menu on the left.
- 3 Compile `compme3.1.html` in the WebSpeed Workshop.
- 4 Run `compme3.1.html` from the post-compilation dialog.

- 5 In Filter, enter `.html`. Highlight all files to be recompiled and click Compile.

**Note** Do not compile the `.html` files in the `tools` directory, such as `rp_rpt_template.html`. These files are intended to be used as samples for creating your own programs and contain code that may cause compile errors.

Typically, you compile the `.html` files only. When you are ready to move to a production environment, you can also compile the program files (`.p`). However, since these are loaded persistently, compiling them does not improve performance significantly.

The compilation process may take a few minutes.

- 6 Compile the two `.w` files in `CSSInstallDir/qadcsc/css/cl/`. In Filter, enter `.w`. Highlight all files to be recompiled and click Compile.

You have completed the upgrade to QAD CSS 4.1.3.1.

## Release Notes for Release 4.1.3

**QAD CSS Version:** 4.1.3

**Release Date:** October, 2004

**MFG/PRO Compatibility:** MFG/PRO eB through SP 8, and eB2 through SP7

The following fixes and changes are included in this release and may require additional configuration and installation changes depending on your system configuration:

- 1 This release includes new tools to support the initial population of a QAD CSS database with information about items and customers in MFG/PRO.
  - Customer Load lets you load information about MFG/PRO customers.
  - Catalog Load lets you load information about MFG/PRO items and the associated QAD CSS categories and catalog layout.

These functions require the use of a new registry setting *uploadFilePath*. By default, this is set to `../qadcass/upload`, a directory created during installation. You can change this through System Registry Maintenance, but ensure that it is set to a directory that the system can write to.

- 2 Updates have been made to support a more straightforward implementation of a business-to-customer (B2C) order-entry scenario. This includes a new home page specifically for B2C users—`op/op_indexB2C.html`—and a new registry setting—*defaultShipVia*—used by the system when B2C customer records are created in MFG/PRO.
- 3 Changes were made to credit-card processing to support a B2C scenario. You can now review the credit card information associated with a sales order using Credit Card Transaction Browse (7.21.2) or Sales Order Credit Maintenance (7.1.13). Changes have been made to Credit Card Vendor Maintenance so that you can specify which credit cards shoppers are allowed to use. Changes were also made to System Module Maintenance to support the use of HTTPS for pages that require security. In addition, a new *httpsURL* registry setting was created to define the URL used for secure processing.

**Important** To implement the credit-card enhancements requires modifications to MFG/PRO that are included on the QAD CSS CD. The required files are located in MFG/PRO version and service-pack specific directories. For example, if you are using MFG/PRO eB2 SP9, use the files in `CSSInstallDir/MFGPRO/eB2/SP9`. You must copy these files to your MFG/PRO installation directory and use MFG/UTIL to compile them. You must also load a `.d` file with new label data into MFG/PRO.

- 4 To support companies implementing QAD CSS, a new implementation guide is now available. This guide includes detailed information on creating your item catalog using QAD-supplied tools, setting up users and security, customizing the appearance of your Web site, managing the order-entry process using flexible system registry fields, and adapting messages to your business requirements. Information is provided for implementing both a business-to-business order scenario and a business-to-customer scenario.

*Implementation Guide: QAD Customer Self Service* (item 78-0627A) is supplied on the Supplemental Documents on CD. Users with a Web account can also find the document on the QAD Support site.

- 5 The installation of QAD CSS has been enhanced to use the standard QAD toolset, including MFG/UTIL. This streamlines the installation and eliminates many of the manual steps previously required.

*Installation Guide: QAD Customer Self Service* (item 78-0618B) has been updated to reflect the changes in the installation process.

**Note** Translated versions of QAD CSS have not been updated for this release. Any new labels and screens added will appear in English. Translations will be included in a forthcoming release.

## Release Notes for Release 4.1.2

**QAD CSS Version:** 4.1.2

**Release Date:** June, 2004

**MFG/PRO Compatibility:** MFG/PRO eB and eB2

The following fixes and changes are included in this release and may require additional configuration and installation changes depending on your system configuration:

- 1** This release includes support for seven additional languages: Latin Spanish, Brazilian Portuguese, French, Simplified Chinese, German, Dutch, and Japanese/Kanji.
- 2** The Error Message Report has been modified so that the Module Name field is now mandatory. A drop-down list of module names is provided for selecting a valid value. This prevents an abnormal system termination that occurred when the report was run without specifying any selection criteria.

## Release Notes for Release 4.1.1

**QAD CSS Version:** 4.1.1

**Release Date:** April, 2004

**MFG/PRO Compatibility:** MFG/PRO eB and eB2

The following fixes and changes are included in this release and may require additional configuration and installation changes depending on your system configuration:

- 1** This release includes support for Latin Spanish, French, Portuguese, and Chinese translations. These initial translations are not complete. Even so, QAD CSS functionality is not limited by the incomplete translations. This will be addressed in an upcoming QAD CSS release.
- 2** The steps for setting up an external administrator user account have changed. The updated steps are included in this release note; see “Update to Administration User Account Creation Process” on page 44 for complete details.
- 3** Several directories have been added to the QAD CSS directory structure. See “Directory Structure Updates” on page 45 for details.
- 4** After installing the files for this release and before you begin configuring or using QAD CSS, you must perform the following activities:
  - Update the release number indicated in the `qadcass/qadcass.ini` file. Update the 4.1 value to 4.1.1 during the installation process when you are updating the other `.ini` file values.
  - Using System Registry Maintenance, update Key Value for the `jmsgdir` entry. The new directory must be an absolute value. QAD recommends you set the absolute value to the `/qadcass/scripts` directory. QAD CSS places generated error message files in language-specific subdirectories under the directory specified.
  - Use Error Message Maintenance to generate error message files.
- 5** A portion of the QAD copyright statement was obscured on the Order Entry III screen. This display issue has been resolved.
- 6** The System Registry Report selection criteria screen has been updated with standard formatting.
- 7** Date validation has been added to Message Maintenance. With this new validation, the end date cannot be blank and must be greater than the start date.
- 8** The order number hyperlink in Order Status History has been fixed. Order details now correctly display from Order Status History.
- 9** Order control updates are now saved.
- 10** When leaving Personal Admin, you are no longer prompted whether to save changes if no changes were made during the session.
- 11** Image path has been corrected for Netscape Web servers.
- 12** The Ship Via value now correctly defaults to blank when the registry value for shipping options is ERP and no generalized codes are defined. This value was incorrectly defaulting to `Fedex 1` and `Fedex 2`.
- 13** All lines originally entered on the order now correctly display in the Order Processing screen.

- 14** This release includes the following Global Tax Management updates:
- Subtracting the tax total from the line total now works correctly.
  - Total calculation was corrected to reflect values in MFG/PRO.
  - Parentheses ( ) were placed around the discount amount.
  - An additional parameter was added to correct the tax calculation on the order and sales quote.
- 15** This release includes the following enhancements to the sales order load process:
- The upload of sales orders now correctly works with MFG/PRO Service Pack 4.
  - When an upload (CIM) fails, the sales order is now completely removed.
  - Error handling has been added to manage a failure during upload of sales quotes.

## Update to Administration User Account Creation Process

The process used to create external administrative users in QAD CSS has been updated. The original procedure is documented in *Administration Guide: QAD Customer Self Service (CSS)* item number 78-0619A. When creating external admin users, use the following updated steps instead.

### External Administration Entries

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

| Allowable Type | Allowable Value |
|----------------|-----------------|
| User ID        |                 |

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

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

**Important** Do not modify the allowable types in the drop-down menu, even if you are a certified QAD CSS developer.

To create an External Administrator association for the selected user:

- 1** Define the ID Type as Customer.
  - a** Select ID Type from the Allowable Type drop-down menu.
  - b** Enter Customer in Allowable Value.
  - c** Click add to submit the values.

- 2 Associate any security groups the external administrator should be able to administer. At least one security group is required for each external administrator profile.
  - a Select Security Group from the Allowable Type drop-down menu.
  - b Using the browse, select a valid security group in Allowable Value.
  - c Click Add to add the security group to the external administrator profile.
  - d Repeat these steps to associate additional security groups.
- 3 Specify the customers that the external administrator can manage. At least one customer must be defined for each external administrator profile.
  - a Select Customer from the Allowable Type drop-down menu.
  - b Using the browse, select the customer whose user accounts are to be administered by the external administrator.
  - c Click Add to add the customer to the external administrator profile.
  - d Repeat these steps to associate additional customers.
- 4 Associate user accounts the external administrator can manage:
  - a Select User ID from the Allowable Type drop-down.
  - b Using the browse, select the user whose user account is to be administered by the external administrator.
  - c Click add to add the user account to the external administrator profile.
  - d Repeat these steps to associate additional users as needed.
- 5 To delete any associated rights, click Delete on the left end of the row.

## Directory Structure Updates

The QAD CSS installation directories structures have been updated. Several directories were added to support non-US English language implementations. The original directory structure is documented in the table on page 13 in *Installation Guide: QAD Customer Service* item number 78-0618A. An updated version of that table is included here. An asterisk (\*) identifies the new or modified directories and descriptions.

| Directory Component | Content Description                                                                        |
|---------------------|--------------------------------------------------------------------------------------------|
| * defs/eng          | English language data definition files and data files used to create the QAD CSS database. |
| * defs/xx           | Non-English language data files; xx refers to the two-letter MFG/PRO language code.        |
| demo                | Data you can use to add a sample catalog to illustrate the storefront.                     |
| demo/defs.css       | QAD CSS data.                                                                              |
| demo/defs.qad       | MFG/PRO data.                                                                              |
| demo/items          | Images for the catalog.                                                                    |
| qadcsc              | Multiple subdirectories with core product files.                                           |
| qadcsc/appstart.p   | Additional optional startup options.                                                       |
| qadcsc/appstart.pf  | Additional optional startup options.                                                       |

|   | Directory Component    | Content Description                                                                                                 |
|---|------------------------|---------------------------------------------------------------------------------------------------------------------|
|   | qadcsc/Compme3.1.html  | Default compiler program.                                                                                           |
|   | qadcsc/qadcsc.ini      | QAD CSS configuration file.                                                                                         |
|   | qadcsc/qadcsc.pf       | Default start parameters for WebSpeed agents.                                                                       |
|   | qadcsc/startex.p       | Variable setup file.                                                                                                |
|   | qadcsc/css             | Multiple subdirectories with QAD CSS program files.                                                                 |
|   | qadcsc/css/ad          | Administrative programs.                                                                                            |
|   | qadcsc/css/adr         | Administrative report programs.                                                                                     |
|   | qadcsc/css/br          | Browser programs.                                                                                                   |
|   | qadcsc/css/ca          | Feedback and FAQ programs.                                                                                          |
|   | qadcsc/css/cc          | Credit card programs.                                                                                               |
|   | qadcsc/css/cl          | License clearance programs.                                                                                         |
|   | qadcsc/css/ext         | Extend layer programs.                                                                                              |
|   | qadcsc/css/he          | Help maintenance programs.                                                                                          |
|   | qadcsc/css/lg          | Log-in programs and programs used to implement the B2C order module.                                                |
|   | qadcsc/css/lib         | Common libraries.                                                                                                   |
|   | qadcsc/css/messages    | Error message program for serious errors.                                                                           |
|   | qadcsc/css/op          | Order processing programs.                                                                                          |
|   | qadcsc/css/opr         | Order processing report programs.                                                                                   |
|   | qadcsc/css/qad         | Programs that directly interface with MFG/PRO database. Contains a subdirectory for each supported MFG/PRO release. |
|   | qadcsc/css/rep         | Replication templates for populating items.                                                                         |
|   | qadcsc/css/sys         | System programs and base report programs.                                                                           |
|   | qadcsc/css/tools       | Utility programs.                                                                                                   |
|   | qadcsc/css/tt          | Temp table definitions used with all programs.                                                                      |
|   | qadcsc/images          | QAD CSS default images.                                                                                             |
|   | qadcsc/images/eng      | Images for the English language.                                                                                    |
| ★ | qadcsc/images/xx       | Images for non-English languages; xx refers to the MFG/PRO language code.                                           |
|   | qadcsc/images/items    | Images for items in the catalog. Initially empty.                                                                   |
|   | qadcsc/images/oe_icons | Images for action icons. Initially empty.                                                                           |
|   | qadcsc/logs            | WebSpeed server logs. Empty when created.                                                                           |
|   | qadcsc/scripts         | Java scripts used by QAD CSS.                                                                                       |
| ★ | qadcsc/scripts/eng_msg | English-based JavaScript messages.                                                                                  |
| ★ | qadcsc/scripts/xx_msg  | JavaScript for non-English languages; xx refers to the MFG/PRO language code.                                       |
|   | qadcsc/scripts/menu    | Menu JavaScripts.                                                                                                   |
|   | qadcsc/styles          | Default cascading style sheets used by QAD CSS.                                                                     |
|   | qadcsc/temp            | QAD CSS stores temporary files. Empty when created.                                                                 |
|   | qadcsc/temp/email      | Used to process e-mail events.                                                                                      |

|  | <b>Directory Component</b> | <b>Content Description</b>                              |
|--|----------------------------|---------------------------------------------------------|
|  | qadcscs/web                | Files that extend the functionality of WebSpeed agents. |
|  | qadcscs/web/objects        | WebSpeed files for Progress 9.1D.                       |
|  | qadcscs/web/objects.91c    | WebSpeed files for Progress 9.1C.                       |
|  | utils_ms                   | Sample scripts for use on Windows systems.              |
|  | utils_ux                   | Sample scripts for use on UNIX systems.                 |

