

Business Portal for Microsoft Dynamics_® GP 2010 Order Management Administrator's Guide

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Introduction

Welcome to Order Management, a Business Portal for Microsoft Dynamics[®] GP application that provides trusted customers and company salespeople with the ability to enter sales orders using their web browsers. Once an order is placed, it is automatically transferred to Microsoft Dynamics GP for processing.

Check for updated instructions

This information was current as of March 16, 2010. The documentation may be updated as new information becomes available. Check the Microsoft Dynamics GP documentation web site (<u>http://go.microsoft.com/fwlink/?LinkId=185513</u>) for the most current documentation.

This introduction is divided into the following sections:

- What's in this manual
- <u>Symbols and conventions</u>
- <u>Additional resources</u>
- <u>Technical support</u>
- <u>Documentation feedback</u>

What's in this manual

This manual will help you install, set up, and administer Order Management. It's divided into the following parts:

- <u>Part 1, Getting started</u>, provides an overview of the Order Management application and explains how to install it.
- <u>Part 2, Microsoft Dynamics GP setup</u>, explains setup procedures you'll need to complete in Microsoft Dynamics GP, such as setting up a document ID for orders placed through Order Management.
- <u>Part 3, Catalog Maintenance setup</u>, explains how to use Catalog Maintenance, the application you'll use to organize your inventory items into catalogs and departments.
- <u>Part 4, Order Management setup</u>, explains how to set up Order Management and assign users to the appropriate roles.
- <u>Part 5, Groups and roles reference</u>, provides details about the SharePoint groups and MBF roles that are used with Order Management.

Symbols and conventions

This manual uses the following symbols to make specific types of information stand out.

Symbol	Description
-َ	The light bulb symbol indicates helpful tips, shortcuts, and suggestions.

Symbol	Description
<u>_!</u>	The warning symbol indicates situations you should be especially aware of when completing tasks. Typically, this includes cautions about performing steps in their proper order, or important reminders about how other information in Business Portal or the back office might be affected.

This manual uses the following conventions to refer to sections, navigation, and other information.

Convention	Description
Install Order Management	Italic type indicates the name of a section or procedure.
File > Print	The (>) symbol indicates a sequence of actions, such as clicking items on a menu or a toolbar or clicking buttons in a window. This example directs you to go to the File menu and click Print .
Bold	Bold type indicates the names of fields, tabs, menus, commands, and buttons, and text you should type.

Additional resources

In addition to this manual, the following documentation is included with this release of Business Portal.

Manuals

The following PDF manuals are included in the Documentation folder on the Business Portal CD.

Business Portal Installation Guide The Business Portal Installation Guide (BusinessPortalInstallation.pdf) provides step-by-step instructions for installing Business Portal.

Business Portal Administrator's Guide The Business Portal Administrator's Guide (BusinessPortalAdminGuide.pdf) explains how to set up and configure Business Portal.

Business Portal User's Guide The Business Portal User's Guide (BusinessPortalUsersGuide.pdf) helps users complete day-to-day tasks in Business Portal.

Application manuals User and Administrator manuals for each application installed in Business Portal are available in the Documentation folder.

Help

Help is available by clicking the Help icon button, located in the upper-right corner of any page. The help that is displayed depends on whether you open help from a Business Portal page, a Microsoft[®] Windows[®] SharePoint[®] Services page or a Microsoft Office SharePoint Server 2007 page or Microsoft SharePoint Server 2010 page.

Business Portal help When you click the Help icon button on a Business Portal page, the relevant help topic for that page is displayed. You can use the search field on the help page to search for information. You also can click the Home icon button to browse the contents of the help.

SharePoint help Many of the features included in Business Portal—such as document libraries, lists, announcements, links, and alerts—are provided by Windows SharePoint Services. General information about these features is provided in the Administering Business Portal help. For more detailed information, refer to the Windows SharePoint Services help, which can be accessed by clicking the Help icon button in the upper-right corner of any Windows SharePoint Services page. If you're using Office SharePoint Server 2007 or Microsoft SharePoint Server 2010, additional help related to the SharePoint Server features also will be available.

Technical support

You can contact Microsoft Dynamics technical support online or by telephone. Go to <u>www.microsoft.com/dynamics</u> and click the CustomerSource link or call 888-477-7877 (in the U.S. and Canada) or 701-281-0555.

Documentation feedback

We welcome comments regarding the usefulness of the Microsoft Dynamics GP documentation. If you have specific suggestions or find any errors in this manual, send your comments by e-mail to the following address: <u>bizdoc@microsoft.com</u>.

Note: By offering any suggestions to Microsoft, you give Microsoft full permission to use them freely.

Part 1: Getting started

This part of the documentation provides an overview of Order Management and explains how to install it.

- <u>Chapter 1, "Overview,"</u> explains what the Order Management application is, describes the features it provides, and outlines the installation and setup process.
- <u>Chapter 2, "Before you install,"</u> explains the tasks you must complete before installing Order Management, such as installing prerequisite software.
- <u>Chapter 3, "Installation,"</u> explains how to install Order Management.

Chapter 1: Overview

The following information explains what Order Management is, describes how it integrates with Microsoft Dynamics GP, and provides an overview of the installation and setup process.

The following sections are included:

- <u>About Order Management</u>
- How Order Management integrates with the back office
- <u>eConnect</u>
- <u>Business Portal site structure</u>
- Installation and setup checklist

About Order Management

Order Management is a Business Portal application that provides trusted customers and company salespeople with the ability to enter sales orders using their web browsers. Once an order is placed, it is automatically transferred to Microsoft Dynamics GP for processing.

Using Order Management, your customers and salespeople can:

- Enter sales orders at any time of the day, any day of the week (as long as the Business Portal web server is running).
- Track the status of orders they've entered.

The Order Entry page is the main page of Order	Enter a sales order and view the status of previous orders. Orders	Company: Fabrikan
Management.	Customer Search Select the customer for whom you want to enter an order. AARONFIT0001 Aaron Fitz Electr	Customer Aaron Fitz E Links
Use these web parts to add items to the —— order.	Item Search Select the item you want to order. OM03215 Dual Basic Headset View Item Detail Add to Order	Add New Cust
Use this web part to track an order's status.	Item Categories • Complete Listing of All Items • Office Equipment • Office Furniture Existing Orders To view detailed information about an order, select a document and click View Document Detail. Show all Orders for Salesperson	•
	● Show all Orders for Selected Customer ▶ Fin Document Number Customer Name Date Order Amount Order Status INVS3051 Riverside University 11/25/2008 \$389.75 INVS3047 Riverside University 10/25/2008 \$389.65 Shipped INVS3014 Riverside University 9/25/2008 \$3,896.53 Shipped INVS3029 Riverside University 8/1/2008 \$4,429.16 Shipped INVS3021 Vancouver Resort Hot 10/1/2007 \$2,657.49 Shipped STDINV2237 Office Design System 4/12/2007 \$31.94 Shipped	nd A

How Order Management integrates with the back office

To use Order Management, the Microsoft Dynamics GP Inventory, Receivables Management, and Sales Order Processing modules must be installed, registered, and set up. The following information provides examples of how Order Management integrates with these modules.

Inventory

The Item Details page in Order Management shows detailed information about an inventory item, such as the item's description, unit of measure, and price. This data comes from the item record in the Inventory module.

The item information you enter in Inventory is displayed in Order [–] Management.

feet of your desk. You st	d with cords! This new desigr ill have the full functionality ires include 40 user-selectab	of a regular headset,			
Unit of measure	From Quantity	To Quantity	Price	Items to Add	
EACH	1	Maximum	\$159.95	۲	

Receivables Management

To finalize an order, a customer, or the salesperson entering the order, must enter shipping and payment information on the Complete Order page in Order Management. The data on this page comes from the customer's record in the Receivables Management module. For example:

- When a customer chooses to charge an order to their account, the customer's credit limit is verified so that the order does not put the customer over the credit limit defined in Receivables Management.
- The customer's billing and shipping addresses, which are defined in Receivables Management, are automatically displayed on the Complete Order page.

	Shipping Information	n		
	Enter a purchase order nu address information. Add		nipping method, requested ship date,	and shipping
The customer's address, defined in Receivables Management, automatically appears on orders.	Customer PO Number Shipping Method Requested Ship Date Billing Address	01357 COURIER V 09/15/2006 3 PRIMARY V	Bob Fitz One Microsoft Way Redmond 98052-6399	
	Shipping Address	WAREHOUSE	USA Bob Fitz 11403 45 St. South Chicago IL 60603-0776 USA	
	Order Note			

Sales Order Processing

Once an order is placed in Order Management, the order is automatically saved to the Microsoft Dynamics GP database. Salespeople can view the order in the Sales Transaction Entry window in Microsoft Dynamics GP.

	🐺 Sales Transaction Entry				
	<u>File E</u> dit <u>T</u> ools View	Options Additional Help	p		sa Fabrikam, Inc. 4/12/2007
	Save Actions -				5 🔊 🚽
	Type/Type ID: Order Document No. 00001				/2008
		NFIT0001 C D A		Default Site ID WA Customer PO Number 123	AREHOUSE
Orders entered in Order		EHOUSE 🔍 11403 45 St. S		Currency ID Z-L	
Management can be viewed	Line Items by Order Entere		Qty Ordered 🔿 🔿		Extended Price
in the Sales Transaction	Item Number O 🔍 🗋	D U of M Each	utý Urdered → 🔼 '	<u>Unit Price</u> \$59.95	Extended Price \$59.95
Entry window.					
					<u> </u>
	Amount Received	\$0.00	→	Subtotal	\$59.95
	Terms Discount Taken	\$0.00	ć	Trade Discount	\$0.00
	On Account	\$59.95		Freight	\$0.00 >
	Comment ID		Q 🗋 🗲	Miscellaneous	\$0.00 + \$0.00 +
	Holds User-Defined	Distributions Com	missions	Tax Total	\$59.95
				Total	
	I I I I I I I I I I I I I I I I I I I	No. 👻	Document Status		Ø @

eConnect

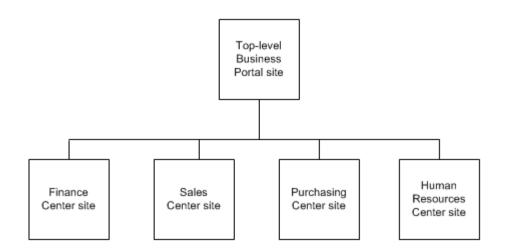
Order Management uses the eConnect application to communicate with your Microsoft Dynamics GP databases.

eConnect is automatically installed with Order Management. For more information about the eConnect installation, see the Business Portal Installation Guide.

Business Portal site structure

Business Portal is composed of multiple web sites. The top-level site contains the main Home page and the administration pages for Business Portal and its applications. Each Business Portal center is a subsite that contains pages related to a particular department or role.

The following illustration shows the Business Portal site structure. (You may have additional center subsites in your implementation.)



You must use the top-level web site to perform administrative tasks for Business Portal and its applications, including Order Management. However, you can administer SharePoint users, groups, and content on each subsite.

For more information about site administration, refer to the Business Portal Administrator's Guide.

Installation and setup checklist

You must complete the following steps to install and set up Order Management.

Task	For more information, see
1. Select a deployment environment.	<i>Intranet vs. extranet deployment</i> on page 11
2. Set up Secure Sockets Layer.	Secure Sockets Layer on page 11
3. Verify that required Microsoft Dynamics GP modules are installed and registered.	<u>Microsoft Dynamics GP modules</u> on page 12
4. Install Catalog Maintenance.	Install Catalog Maintenance on page 12
5. Install Order Management.	Chapter 3, "Installation"
6. Complete setup tasks in Microsoft Dynamics GP.	Part 2, Microsoft Dynamics GP setup
7. Complete setup tasks in Catalog Maintenance.	Part 3, Catalog Maintenance setup
8. Complete setup tasks in Order Management.	Part 4, Order Management setup

Chapter 2: Before you install

The following sections describe the tasks you must complete before installing Order Management:

- <u>Intranet vs. extranet deployment</u>
- <u>Secure Sockets Layer</u>
- <u>Microsoft Dynamics GP modules</u>
- <u>Install Catalog Maintenance</u>

Intranet vs. extranet deployment

Business Portal can be deployed in an intranet or extranet environment. The environment you choose determines who can use Order Management.

Intranet An intranet is your company's internal network. When you deploy Business Portal in an intranet environment, only company salespeople will be able to enter orders in Order Management.

Extranet An extranet is an extension of your company's intranet that provides limited access to authorized outside users. When you deploy Business Portal in an extranet environment, both your customers and salespeople will be able to enter orders in Order Management.

If you decide to deploy Business Portal in your intranet, you can add external access at a later time.

For information about setting up intranet and extranet environments, see the Business Portal Installation Guide.

For information about how to give your customers and salespeople access to Order Management, see <u>Chapter 12, "Groups and roles."</u>

Secure Sockets Layer

If you'll be accepting credit card payments from customers, you must set up Secure Sockets Layer (SSL) on your Business Portal web server. SSL is a feature of Internet Information Services (IIS) that encrypts data, such as credit card numbers, when it is transmitted over the Internet, in order to prevent eavesdropping, tampering, and message forgery.

When you use SSL and a customer submits an order, a key (encryption value) is applied to the data that's being transmitted from the customer. This key encrypts, or scrambles the data. When the order information is received by IIS, the same key is used to convert the encrypted data back to its original form.

To set up SSL, you must install a certificate and a private key on your Business Portal web server. For more information, refer to the IIS Operations Guide, available on Microsoft TechNet (<u>www.microsoft.com/technet</u>). Refer to the Business Portal Administrator's Guide for instructions on how to configure SSL for Business Portal.

If you won't be accepting credit card payments in Order Management, SSL is not required. Orders will be charged to customers' accounts.

Microsoft Dynamics GP modules

Before installing Order Management, verify that the following Microsoft Dynamics GP modules are installed, registered, and set up:

- Inventory
- Receivables Management
- Sales Order Processing

For information about these modules, refer to the Microsoft Dynamics GP documentation.

Install Catalog Maintenance

Before installing Order Management, you must install Catalog Maintenance, which is the application you'll use to organize your inventory items into catalogs and departments.

Install Catalog Maintenance on a computer that has:

- An ODBC data source set up to connect to the SQL Server computer for Microsoft Dynamics GP.
- Microsoft .NET Framework 2.0 or later installed.

Use the following steps to install Catalog Maintenance.

- 1. From the Business Portal installation media, double-click the **CDSetup.exe** file.
- 2. The main Business Portal installation screen should appear. Click **Catalog Maintenance**.
- 3. The Custom Setup window appears. Specify the folder where you want the Catalog Maintenance files installed. The default folder is C:\Program Files\Microsoft Dynamics\Catalog Maintenance. To select a different folder, click **Browse**.

After you have specified the installation folder, click **Next**.

- 4. The Ready to Install window appears. Click Install.
- 5. The Installation Complete window appears. Click **Finish** to close the wizard.

Chapter 3: Installation

Use the following information to install Order Management:

- <u>User rights for installation</u>
- Windows user in the Dyngrp role
- <u>Install Order Management</u>

User rights for installation

To install Order Management, you must log on to the Business Portal web server as a user with the following access rights:

Administrators group You must be a member of the Administrators group on the server.

Administrator rights for SQL Server During the installation, you will be prompted to enter SQL Server connection information.

- If you want to connect to SQL Server using Windows Trusted Authentication, you must log on to the Business Portal web server with a Windows logon ID that has administrative rights to SQL Server.
- If you want to connect to SQL Server using SQL Server Authentication, you'll
 need to enter a SQL Server administrator logon ID and password during the
 installation.

Windows user in the Dyngrp role

When you install Order Management, you will be asked to specify a Windows user that is assigned to the Dyngrp user role in both the DYNAMICS database and each of your company databases. This user account is used by Order Management to communicate with the Microsoft Dynamics GP databases.

Install Order Management

If you did not install Order Management when running the Business Portal installation wizard, use the Setup Wizard to add it to your Business Portal installation. If you've installed Business Portal on multiple web servers, you must add Order Management to each of the web servers.

Before installing

Before you can install Order Management, you must enter registration keys for it in the back office. You can view the applications you're registered for using the Microsoft Dynamics GP Options window. Refer to your Microsoft Dynamics GP documentation for more information.

To install Order Management

To install Order Management, you must run the Setup Wizard. To start the Setup Wizard, use one of the following methods:

• From the Business Portal installation media on your web server computer, double-click the **CDSetup.exe** file. Under **Install**, click **Business Portal for Microsoft Dynamics GP**. Click **Add/Remove Features**.

• Open the Add or Remove Programs control panel and select **Business Portal** for Microsoft Dynamics GP 2010. Click Change to open the Modify Business Portal Installation window. Click Add/Remove Features.

For detailed instructions, refer to the "Additional Applications" chapter of the Business Portal Installation Guide.

Part 2: Microsoft Dynamics GP setup

To use Order Management, the Microsoft Dynamics GP Inventory, Receivables Management, and Sales Order Processing modules must be set up. Refer to each module's documentation for complete setup instructions.

After the modules have been set up, refer to the following information. which describes specific setup tasks you'll need to complete in Microsoft Dynamics GP. It's important that you complete these tasks so that Order Management functions appropriately.

- <u>Chapter 4, "Items,"</u> helps you enter item information in Microsoft Dynamics GP, such as an item's description, price, and location.
- <u>Chapter 5, "Document type IDs,"</u> helps you create a document type ID to assign to orders placed through Order Management.
- <u>Chapter 6, "Credit cards,"</u> describes how to set up the credit cards that you will accept for payment in Order Management.
- <u>Chapter 7, "Customer-specific pricing,"</u> explains how to sell an item at different prices to different customers. For example, you can sell a computer for \$2,500 to a retail customer, and sell the same computer for \$1,500 to a wholesale customer.

Chapter 4: Items

The item information you enter in Microsoft Dynamics GP is displayed on your Order Management pages. The following sections will help ensure that you have the appropriate item information entered in Microsoft Dynamics GP, so that your Order Management pages look the way you want them to.

- <u>Assign items to a site</u>
- <u>Enter item names and descriptions</u>
- <u>Enter item prices</u>
- Enter unit of measure descriptions
- <u>Display item images</u>

Assign items to a site

The items that you'll sell through Order Management must be assigned to a inventory site. You can assign items to a site using Microsoft Dynamics GP.

Use the following steps to assign each item you'll sell through Order Management to a site.

- Open the Item Quantities Maintenance window. Cards > Inventory > Quantities/Sites
- 2. Enter or select an item number.
- 3. Enter or select an inventory site in the Default Site ID field.
- 4. Click Save.

Repeat these steps for each item you'll sell through Order Management.

Enter item names and descriptions

The Item Details page in Order Management displays an item's name and description.



The item name that is displayed is taken from the **Description** field in the Microsoft Dynamics GP Item Maintenance window. The description is taken from the **Additional Information** field in the Internet Information window.

Use the following steps to enter an item's name and description in Microsoft Dynamics GP.

- Open the Item Maintenance window. Cards > Inventory > Item
- 2. Enter or select an item number.
- 3. In the **Description** field, enter a name or brief description of the item.
- 4. Click the **Internet Information** icon.
- 5. The Internet Information window appears. Enter a description of the item in the **Additional Information** field.
- 6. Click Save. Close the Internet Information window.
- 7. The Item Maintenance window is redisplayed. Click Save.

Enter item prices

When you complete setup tasks in Order Management (as described in <u>Chapter 13,</u> <u>"Order Management setup options"</u>), you'll select whether you want to use the List Price method or Customer Pricing method. The method you select determines the prices items are sold for in Order Management.



If you are using extended pricing in Microsoft Dynamics GP, items that are assigned to price groups will not appear in Order Management. You must assign items to price sheets individually in order for them to appear in Order Management.

An item's price is determined by the pricing method you select: List Price or Customer Pricing.



List Price method

If you use the List Price method, items will be sold according to the price methods and price lists that are defined in Microsoft Dynamics GP. For information on how to set up standard pricing, search for "standard price lists" in the Microsoft Dynamics GP Inventory Control documentation.

Customer Pricing method

If you use the Customer Pricing method, you can sell the same item at different prices to different customers. For example, you can sell a computer for \$2,500 to a retail customer, and sell the same computer for \$1,500 to a wholesale customer.

For information on how to set up customer-specific pricing in Microsoft Dynamics GP, see <u>Chapter 7, "Customer-specific pricing."</u>

Enter unit of measure descriptions

The Order Management Item Details page displays the units of measure in which each item can be purchased, such as *Each* or *Case*.

If you'd rather display a description of the unit of measure, instead of just the unit of measure, use the following steps to enter a description in the Microsoft Dynamics GP Unit of Measure Schedule Setup window.

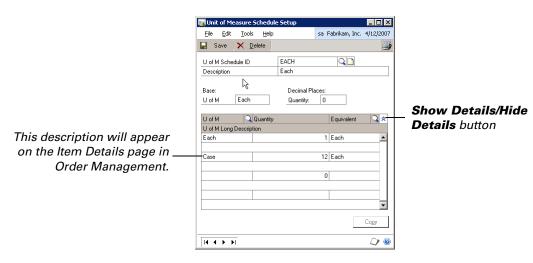


Quantities must be measured in whole units. Decimals can't be used. Customers must enter the quantity as a whole number. If a customer requires a quantity containing a decimal place, you'll have to enter the order in the Microsoft Dynamics GP Sales Transaction Entry window.

	Item Details							•
	Dual Basic Headset							
	Your price: \$150.00							
	This dual basic headset is the perfect choice earphones rest on your ears, allowing you t adjustable and flexibleallowing the best po	o hear more clearly. I	padded It is fully					
	Unit of measure	From Quantity	To Quantity	Price	Items to Add			
Unit of measure —	- Each	1	100	\$150.00	۲			
	Each	101	Maximum	\$75.00	\circ			N
Unit of measure —	Case: There are 12 items per case	1	Maximum	\$900.00	\circ			
description								
						Add to Order	Go Back	View Shopping Cart

- Open the Unit of Measure Schedule Setup window. Microsoft Dynamics GP menu > Tools > Setup > Inventory > Unit of Measure Schedule
- 2. Enter or select a unit of measure schedule ID.

3. Click the **Show Details** button.



4. In the **U of M Long Description** field, enter a description for the unit of measure. This description will appear on the Item Details page in Order Management.

For example, if you enter a description for the Case unit of measure, the description will appear on the Item Details page instead of the word "Case."

5. Click Save.

Display item images

The Order Management Item Details page can display images of your items.



The image files displayed on this page must be .gif, .bmp, .jpg, or .png files.

To display item images, you'll need to:

• Save your item images in a folder on the Business Portal web server. We recommend that you use the following folder:

\Program Files\Microsoft Dynamics\Business Portal\Applications\OrderManagement\Images

- Specify each item's image file name in the Microsoft Dynamics GP Internet Information window.
- Specify the location of the image files on the Business Portal Order Management Setup page.

The following procedures will help you complete these tasks.

To save your item images on the Business Portal web server:

1. On the Business Portal web server, go to the following folder:

\Program Files\Microsoft Dynamics\Business Portal\Applications\OrderManagement\Images

2. Copy your item images to this folder.

To specify an item's image file name:

- Open the Item Maintenance window. Cards > Inventory > Item
- 2. Enter or select an item number.
- 3. Click the Internet Information icon.
- 4. The Internet Information window appears. In the **Image** field, enter the selected item's image file name.
- 5. Click Save. Close the Internet Information window.
- 6. The Item Maintenance window is redisplayed. Click Save.

To specify the location of the image files:

You'll specify the location of your image files when selecting setup options on the Business Portal Order Management Setup page. For more information, see <u>Image</u> options on page 59.

Chapter 5: Document type IDs

All documents in Sales Order Processing are assigned a *document type ID*. For example, you may be using the STDORD document type ID for orders and the STDINV document type ID for invoices.

When you set up Order Management (in <u>Chapter 13, "Order Management setup</u><u>options"</u>), you'll need to select a document type ID for orders placed through Order Management. You may want to select an existing document type ID, such as STDORD; or, you many want to create a new document type ID specifically for Order Management orders.

You can create a new document type ID, or select an existing ID to assign to ____ Order Management orders.

Sales Transaction Entry	,							_ [1 X
File Edit Tools View		Additional H	elo				sa Eabr	ikam, Inc. 4/12/2	
Save Actions -	i options		-12				30 1 001		
Save Actions •								S 🔊 -	۲
Type/Type ID: Urde		ORDM	٨N		Date		/2008		
Document No. 000	101	Q 🗋 🔶	_		Batch ID	SO	P ORDERS		>
	RONFIT0001	r 🗋	>		Default Site II		REHOUSE	Q 🗋	
	on Fitz Electri				Customer PO				
Ship To Address WA	REHOUSE	🔍 11403 45 SI	South	8	Currency ID	Z·L	JS\$	<u> </u>	>
➡ Line Items by Order Enter	red							₽ + 3+	۲
Item Number 💿 🔍	🗋 🔶 D	U of M	🔾 Qty Ordered	→ 🛆	Lunit Price		Extended Prid	ce	
100×LG		Each			Ũ	\$59.95		\$59.95	
									•
Amount Received		\$0.0	0 🔸			btotal		\$59.95	
Terms Discount Taken		\$0.0	0 🗧			ade Discount		\$0.00	<u> </u>
On Account		\$59.9	5			eight		\$0.00	<u> </u>
Comment ID			Q 🗋 🔶			scellaneous		\$0.00	<u> </u>
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If you want to create a new document type ID for Order Management orders, refer to the following sections:

- <u>Allocation methods and quantity shortages</u>
- <u>Create a document type ID</u>

Allocation methods and quantity shortages

As part of creating a document type ID, you'll need to select an allocation method. The allocation method you choose determines whether quantity shortages are addressed in Order Management.

Line Item If you select this allocation method, items will be allocated when users click the **Check Out** button on the Shopping Cart page of Order Management. If a quantity shortage exists for an item, the quantity shortage will be handled according to the quantity shortage option you select on the Order Management Setup page. For more information, see <u>Document type and quantity shortage options</u> on page 54.



If you're tracking serial or lot numbers for an item, those items will not be allocated by Order Management. You must use Microsoft Dynamics GP to allocate those items.

Document/Batch If you select this allocation method, quantity shortages will not be addressed in Order Management. Items will be allocated—and quantity shortages addressed—when you allocate entire documents or batches using the Microsoft Dynamics GP Sales Allocation-Fulfillment Options window.

None If you select this option, quantity shortages will not be addressed in Order Management. Items won't be allocated (and quantity shortages won't be addressed) until the order has been transferred to an invoice, fulfillment order, or back order.

Create a document type ID

Use the following steps to create a document type ID. When you set up Order Management (in <u>Chapter 13</u>, "Order <u>Management setup options</u>"), you'll need to select this document type ID to assign it to orders placed through Order Management.

- Open the Sales Order Processing Setup window. Microsoft Dynamics GP menu > Tools > Setup > Sales > Sales Order Processing
- 2. Click Order to open the Sales Order Setup window.
- 3. In the **Order ID** field, enter a new document type ID to identify orders placed through Order Management.

For example, you may want to enter **OMORD** to indicate the order originated in Order Management, or **BPORD** to indicate the order originated within Business Portal.

- 4. Enter the next document number, such as 0001.
- Complete the setup, including selecting an allocation method. The allocation method you choose affects when quantity shortages are addressed. For more information, see <u>Allocation methods and quantity shortages</u> on page 23.

For detailed information about the fields on this window, see the online help (**Help** > **About This Window**).

6. Click Save.

Chapter 6: Credit cards

To accept credit card payments in Order Management, you'll need to enter information about each credit card type in Microsoft Dynamics GP. The following information explains how to do so:

- Set up credit cards
- <u>Credit card validation</u>
- <u>Secure Sockets Layer</u>

Set up credit cards

The following credit cards can be accepted in Order Management:

- Visa
- MasterCard
- American Express
- Discover
- Diners Club
- JCB

Use the following steps to set up a credit card in Microsoft Dynamics GP.

- Open the Credit Card Setup window. Microsoft Dynamics GP menu > Tools > Setup > Company > Credit Cards
- 2. Enter a card name.

Depending on which credit card you're setting up, you **must** enter the name as follows.

Credit card type	You must enter this name
Visa	VISA
MasterCard	MasterCard
American Express	Amex
Discover Card	Discover
Diners Club	Diners Club
JCB	JCB

- 3. Select the Accepted from Customers check box.
- 4. Select the **Charge Card** option and select the General Ledger account that will track payments made with this charge card. The account must be a credit card receivables account.

Payments made with charge cards are treated as accounts receivable amounts. They must be submitted to the credit card company, and the reimbursement must be received, before the payment is considered received.



Do not assign an intercompany account to the credit card; Order Management doesn't support intercompany transaction processing.

5. Click Save.

Credit card validation

Order Management does not validate the credit card numbers your customers enter on their orders. If you are accepting credit card payments in Order Management, consider using a third-party application for credit card validation.

Secure Sockets Layer

To accept credit card payments from customers, you must set up Secure Sockets Layer (SSL) on your Business Portal web server. For more information, see <u>Secure</u> <u>Sockets Layer</u> on page 11.

Chapter 7: Customer-specific pricing

When you set up Order Management (in <u>Chapter 13</u>, <u>"Order Management setup</u><u>options"</u>), you'll need to select a pricing method. If you choose the Customer Pricing method, you can sell the same item at different prices to different customers. For example, you can sell a computer for \$2,500 to a retail customer, and sell the same computer for \$1,500 to a wholesale customer.

To offer customer-specific pricing in Order Management, complete the following procedures in Microsoft Dynamics GP.

- <u>Create a price level</u>
- <u>Add a price level to a price list</u>
- <u>Assign a price level to a customer record</u>

Create a price level

A price level is a category of prices. It is used to specify different prices for different groups of customers. For example, you might want to create a Retail price level for retail customers, and a Wholesale price level for wholesale customers.

Use the following steps to create a price level.

 Open the Price Level Setup window. Microsoft Dynamics GP menu > Tools > Setup > Inventory > Price Level

🐺 Price Level Setup							
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Description	HetailEuston	ner Price					
III I > > by	Price Level	•	۵ 🗘				

- 2. Enter a name and description for the price level.
- 3. Click Save.

Add a price level to a price list

A price list contains all the prices for a particular item. For example, a price list can contain an item's retail price and wholesale price.

Use the following steps to add a price level to an item's price list.

- Open the Item Price List Maintenance window. Cards > Inventory > Price List
- 2. Enter or select an item number.
- 3. In the tree view, expand the item's price list information.

- 4. Determine where in the price list's hierarchy you want to add the price level:
 - If the price list includes pricing for multiple currencies, select a currency in the tree view.
 - If the price list includes only one currency, select the item number in the tree view.
- 5. Place your cursor in the first blank line in the scrolling window.

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- 6. Enter or select the price level you created in *Create a price level* on page 27.
- 7. Enter or select a unit of measure.
- 8. Enter pricing information.

Your entries are saved automatically as soon as they're entered in the scrolling window. You can click **Save** to clear the window, or you can continue to add to the price list—entering pricing information for other currencies, if needed.

9. When you've finished entering pricing information, choose **File** > **Print** to generate the Item Price List report and verify your entries.

Repeat these steps for each item you want to sell at the new price level.

Assign a price level to a customer record

To assign customer-specific pricing, you must assign a price level to a customer record. Use the following steps to do so.



If a price level is not specified in the customer record, the price level specified in the Receivables Management Setup window will be used to calculate an item's price.

- Open the Customer Maintenance window. Cards > Sales > Customer
- 2. Enter or select the customer you want to assign the price level to.

3. In the **Price Level** field, enter or select the price level you created in <u>*Create a price*</u> *level* on page 27.

For example, suppose you added the WHOLESALE price level to the A100 Audio System's price list, and then assigned the WHOLESALE price level to Aaron Fitz Electrical's customer record. When Aaron Fitz logs on to Order Management, he'll be able to buy the A100 Audio System at the wholesale price.

Customer Mainten						
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4. Click Save.

Part 3: Catalog Maintenance setup

Use Catalog Maintenance to organize your inventory items into catalogs and departments, so that customers can easily browse through your inventory and find the items they want to order.

The following information explains how to use Catalog Maintenance:

- <u>Chapter 8, "Catalogs and departments,"</u> explains how to create a master catalog and departments.
- <u>Chapter 9, "Items,"</u> describes how to assign items to each department.
- <u>Chapter 10, "Display options,"</u> explains how to change the way item information is displayed in Catalog Maintenance.
- <u>Chapter 11, "Catalog Maintenance administration tasks,"</u> contains procedures you may use to help administer and manage Catalog Maintenance.

Chapter 8: Catalogs and departments

The Order Entry page in Order Management displays categories of inventory items. These categories are defined in Catalog Maintenance.

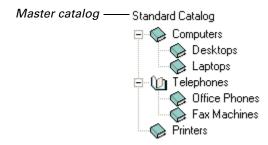


To begin defining these categories, you'll need to set up a catalog structure. A catalog structure consists of a master catalog and departments. The following sections explain how to create these elements.

- <u>Create a master catalog</u>
- <u>Create departments</u>
- <u>Copy departments</u>
- Delete master catalogs and departments

Create a master catalog

The first step in organizing your inventory items is to set up a master catalog. A master catalog is at the top of the catalog hierarchy. It contains all the departments that you'll categorize your items into.



You can create an unlimited number of master catalogs. However, only one catalog can be used at a time. For example, suppose you sell different products at different times of the year. You could create spring, summer, fall, and winter master catalogs. To specify which catalog you want to use, you'll need to mark it as the default catalog.

Use the following steps to create a master catalog.

- Open Catalog Maintenance. Start > All Programs > Microsoft Dynamics > Catalog Maintenance > Catalog Maintenance
- 2. The Login window appears. Select a data source name to connect to the SQL server for Microsoft Dynamics GP. Then enter your SQL Server[®] user name and password. Click **OK**.
- 3. The Company Select window appears. Select the company for which you'll organize inventory items. Click **OK**.

The Microsoft Dynamics GP Catalog Maintenance window appears.

- 4. Choose **File** > **New** > **Master Catalog**. The Master Catalog Properties window appears.
- 5. Enter an ID for the catalog.
- 6. If this is the master catalog you currently want to use with Order Management, select the **Default Catalog** check box.
- 7. Enter the catalog's name in the Name field.
- 8. Enter a brief description of the catalog in the **Description** field.
- 9. You can enter a longer description of the catalog in the **Extended Description** field.



The **Image Path**, **User-Defined 1**, and **User-Defined 2** fields are not supported at this time.

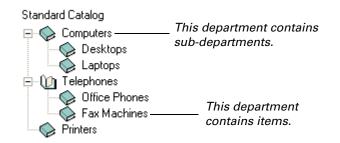
10. Click OK.

Create departments

Master catalogs contain departments. These departments are the categories that you see on the Order Entry page of Order Management.



A department can contain sub-departments or items. (A department cannot contain both sub-departments and items.)



Use the following steps to create a department.

- 1. In the console tree, select the master catalog or department you want the new department to appear beneath.
- Choose File > New > Department. The Department Properties window appears.
- 3. Enter an ID for the department.
- 4. Enter the department's name in the **Name** field.
- 5. Enter a brief description of the department in the **Description** field.
- 6. You can enter a longer description of the department in the **Extended Description** field.



- *The* **Image Path**, **User-Defined 1**, and **User-Defined 2** fields are not supported at this time.
- 7. Click OK.

Copy departments

You can copy a department and paste it into another area of your catalog structure.

When you copy a department, you copy it and all of its sub-departments and assigned items. You can then paste the department (including its sub-departments and assigned items) into another department.

Use the following steps to copy a department.

- 1. In the console tree, select the department you want to copy.
- 2. Click the **Copy** button on the toolbar.

The selected department, along with its sub-departments and assigned items, will be copied to the Clipboard.

- 3. In the console tree, select the department you want to copy the department (from step 1) into. You cannot paste it into a department that already has assigned items.
- 4. Click the **Paste** button on the toolbar.

Delete master catalogs and departments

Use the following steps to delete a master catalog or department.

Keep in mind, when you delete a master catalog or department, all of its subdepartments are also deleted.

- 1. In the console tree, select the master catalog or department you want to delete.
- 2. Click the **Delete** button on the toolbar.
- 3. A dialog box appears, asking you to confirm the removal. Click Yes.

Chapter 9: Items

Once you've set up a master catalog and departments (as described in <u>Chapter 8,</u> <u>"Catalogs and departments"</u>), you can assign your inventory items to the departments. The following information explains how to assign items to departments:

- <u>Assign individual items to a department</u>
- <u>Assign a group of items to a department</u>
- <u>View details about an item</u>

Assign individual items to a department

You can assign items to a department on an individual basis, or you can create a group of items and assign the group to the department. The following steps explain how to assign items to a department on an individual basis.

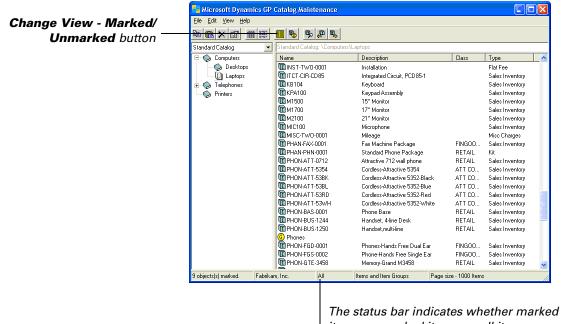
1. In the console tree, select the department you want to assign an item to.



You cannot assign an item to a department that contains sub-departments.

- 2. Find the **Change View Marked/Unmarked** button on the toolbar. This button acts as a toggle switch. By clicking it you can display:
 - All inventory items
 - Marked items (items that have been assigned to the department)
 - Unmarked items (items that have not been assigned to the department)

Click the **Change View - Marked/Unmarked** button until all items are displayed.



The status bar indicates whether marked items, unmarked items, or all items are displayed.

3. Double-click the item you want to assign to the department. The item name will appear in bold type, indicating that the item has been assigned to the department.

Repeat this step for each item you want assigned to the department.

Assign a group of items to a department

If you have several items to assign to a department, you may want to create an *item group*, and assign it to a department. An item group is a collection of inventory items that meet specific criteria. For example, you can create an item group for all items that contain the word "phone" in their item descriptions, or for all items whose item number is greater than 500.

When a new item is added to Inventory in Microsoft Dynamics GP—and it meets the criteria set up for the item group—the item is automatically added to the group.

To create an item group:

- Choose File > New > Item Group. The Item Group Maintenance window appears.
- 2. Enter a name for the item group.
- 3. Enter a brief description of the item group.
- 4. To specify which items will be included in the group, select a field, select an operator, and enter a value.

For example, to create an item group for all items that contain the word "phone," you could enter the following information:

Field: Description

Operator: Equal to

Value: phone

Select the **Match Case** check box if the information you entered in the **Value** field is case-sensitive.

5. Click Save.

To assign an item group to a department:

1. In the console tree, select the department you want to assign the item group to.



You cannot assign an item group to a department that contains sub-departments.

- 2. Find the **Change View Items/Groups** button on the toolbar. This button acts as a toggle switch. By clicking it you can display:
 - Items
 - Items groups
 - Items and item groups

Click the Change View - Items/Groups button until item groups are displayed.

	Nicrosoft Dynamics GP	Catalog Maintenance				
Change View - Items/	<u>File E</u> dit ⊻iew <u>H</u> elp					
Groups button						
Cicupo batteri	Standard Catalog 📃 💌	Standard Catalog: \Computers\	Laptops			
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	🛛 🏀 Desktops	INST-TWO-0001	Installation		Flat Fee	
	Laptops	TCT-CIR-CD85	Integrated Circuit, PCD85-1		Sales Inventory	
	🛨 🏟 Telephones	I KB104	Keyboard		Sales Inventory	
		T KPA100	Keypad Assembly		Sales Inventory	
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		1700	17" Monitor		Sales Inventory	
			21" Monitor		Sales Inventory	
			Microphone		Sales Inventory	
			Mileage		Misc Charges	
		PHAN-FAX-0001	Fax Machine Package	FINGOO	Sales Inventory	
		PHAN-PHN-0001	Standard Phone Package	RETAIL	Kit	
			Attractive 712 wall phone	RETAIL	Sales Inventory	
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			Phone-Hands Free Single Ear	FINGOO	Sales Inventory	
		PHON-GTE-3458	Memory-Grand M3458	RETAIL	Sales Inventory	~
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The status bar indicates whether items, item groups, or both are displayed.

3. Double-click the item group you want to assign to the department. The group name will appear in bold type, indicating that the item group has been assigned to the department.

View details about an item

Use the following steps to view details about an item, such as the item's description, price, and quantity available information.

- 1. In the details pane, right-click an item. Choose **Properties**.
- 2. The Item Inquiry window appears, displaying details about the item, such as its description, price, and quantity available.

You can't modify the information in this window. If you need to make changes to the data, you'll need to make the changes in Microsoft Dynamics GP.

3. Click **OK** to close the window.

Chapter 10: Display options

There are several ways to display item information in the details pane of Catalog Maintenance. The following sections describe each display option:

- <u>Items vs. item groups</u>
- Marked vs. unmarked
- List vs. details
- Modify the data block
- <u>Set up item filters</u>
- <u>Delete item filters</u>

Items vs. item groups

The **Change View - Items/Groups** button on the toolbar acts as a toggle switch. By clicking it, you can display:

- Items
- Items groups
- Items and item groups

The status bar at the bottom of Catalog Maintenance indicates whether you are viewing items, item groups, or both.

	🚭 Microsoft Dynamics G	P Catalog Maintenance				
Change View - Items/	<u>File E</u> dit <u>V</u> iew <u>H</u> elp					
Groups button						
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	🖃 🍥 Computers	Name	Description	Class	Туре	<u>^</u>
	🛛 🍥 Desktops	INST-TWO-0001	Installation		Flat Fee	
	Laptops	TCT-CIR-CD85	Integrated Circuit, PCD85-1		Sales Inventory	
	🛨 厥 Telephones	🕅 KB104	Keyboard		Sales Inventory	
	Printers	T KPA100	Keypad Assembly		Sales Inventory	
	, The second sec	🔟 м1500	15" Monitor		Sales Inventory	
		🔲 M1700	17'' Monitor		Sales Inventory	
		1 M2100	21" Monitor		Sales Inventory	
		Шмістоо	Microphone		Sales Inventory	
		MISC-TWO-0001	Mileage		Misc Charges	
		PHAN-FAX-0001	Fax Machine Package	FINGOO	Sales Inventory	
		PHAN-PHN-0001	Standard Phone Package	RETAIL	Kit	
		PHON-ATT-0712	Attractive 712 wall phone	RETAIL	Sales Inventory	
		PHON-ATT-5354	Cordless-Attractive 5354	ATT CO	Sales Inventory	
		PHON-ATT-53BK	Cordless-Attractive 5352-Black	ATT CO	Sales Inventory	
		PHON-ATT-53BL	Cordless-Attractive 5352-Blue	ATT CO	Sales Inventory	
		PHON-ATT-53RD	Cordless-Attractive 5352-Red	ATT CO	Sales Inventory	
		PHON-ATT-53WH	Cordless-Attractive 5352-White	ATT CO	Sales Inventory	
		PHON-BAS-0001	Phone Base	RETAIL	Sales Inventory	- 18
		PHON-BUS-1244	Handset, 4-line Desk	RETAIL	Sales Inventory	_
		PHON-BUS-1250	Handset,multi-line	RETAIL	Sales Inventory	
		Phones				
		PHON-FGD-0001	Phones-Hands Free Dual Ear	FINGOO	Sales Inventory	
		PHON-FGS-0002	Phone-Hands Free Single Ear	FINGOO	Sales Inventory	
		PHON-GTE-3458	Memory-Grand M3458	RETAIL	Sales Inventory	~
	9 objects(s) marked. Fabrik	am, Inc. All	Items and Item Groups Pag	e size - 1000 Items	3	

The status bar indicates whether items, item groups, or both are displayed.

Marked vs. unmarked

The **Change View - Marked/Unmarked** button on the toolbar acts as a toggle switch. By clicking it you can display:

- Marked items (items that have been assigned to the selected department)
- Unmarked items (items that have not been assigned to the selected department)
- All items

The status bar at the bottom of Catalog Maintenance indicates whether you are viewing marked items, unmarked items, or both.

	Nicrosoft Dynamics GP	Catalog Maintenance				
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	Laptops	TTCT-CIR-CD85	Integrated Circuit, PCD85-1		Sales Inventory	
	🛨 🍥 Telephones	🕅 КВ104	Keyboard		Sales Inventory	
	Printers	T KPA100	Keypad Assembly		Sales Inventory	
	, the second sec	Ш м1500	15" Monitor		Sales Inventory	
		🕅 м1700	17'' Monitor		Sales Inventory	
		🕅 M2100	21" Monitor		Sales Inventory	
		I MIC100	Microphone		Sales Inventory	
		MISC-TWO-0001	Mileage		Misc Charges	
		PHAN-FAX-0001	Fax Machine Package	FINGOO	Sales Inventory	
		PHAN-PHN-0001	Standard Phone Package	RETAIL	Kit	
		PHON-ATT-0712	Attractive 712 wall phone	RETAIL	Sales Inventory	
		PHON-ATT-5354	Cordless-Attractive 5354	ATT CO	Sales Inventory	
		PHON-ATT-53BK	Cordless-Attractive 5352-Black	ATT CO	Sales Inventory	
		PHON-ATT-53BL	Cordless-Attractive 5352-Blue	ATT CO	Sales Inventory	
		PHON-ATT-53RD	Cordless-Attractive 5352-Red	ATT CO	Sales Inventory	
		PHON-ATT-53WH	Cordless-Attractive 5352-White	ATT CO	Sales Inventory	
		PHON-BAS-0001	Phone Base	RETAIL	Sales Inventory	
		PHON-BUS-1244	Handset, 4-line Desk	RETAIL	Sales Inventory	_
		PHON-BUS-1250	Handset,multi-line	RETAIL	Sales Inventory	
		G Phones				
		PHON-FGD-0001	Phones-Hands Free Dual Ear	FINGOO	Sales Inventory	
		PHON-FGS-0002	Phone-Hands Free Single Ear	FINGOO	Sales Inventory	
		PHON-GTE-3458	Memory-Grand M3458	RETAIL	Sales Inventory	~
	9 objects(s) marked. Fabrik	am, Inc. All	Items and Item Groups Page	size - 1000 Item:	s	11.

The status bar indicates whether marked items, unmarked items, or both are displayed.

List vs. details

The item information in the details pane can be displayed in a list view or details view.

	Microsoft Dynamics GP	Catalog Maintenand	ce					
	<u>F</u> ile <u>E</u> dit ⊻iew <u>H</u> elp							
View List button —	B R × B # #							
	Standard Catalog 📃 💌	Standard Catalog: \Cor	mputers\Laptops					
Item information is displayed in a list.	Computers Desktops Laptops Celephones Printers	1002×LG 128 SDRAM 1.43261A 1.43261A 1.43483A 1.43483A 1.24×1DE 1.256 SDRAM 1.24×2284A 1.32 SDRAM 1.32 SDRAM 1.34284A 1.32 SDRAM 1.34290A 1.342990A 1.342990A 1.342990A 1.342990A 1.343542A 1.343542A 1.343542A 1.343813A 1.36387A 1.362924A	III 3E 4471A III 3E 4472A III 3E 4472A III 3E 4592A III 3E 4592A III 45HD III 400PR0C III 450PR0C III 44541DE III 450PR0C III 4A3551A III 4A35539A III 4A3566A III 4E 55330A III 560PR0C III 560SSY III 500PR0C III		III CAP100 III CB100 III CBA100 III CBA100 III COMPBOOK III FAXX-CAN-9800 III FAXX-SLK-060E III FAXX-SLK-2100 III FAXX-SLK-2100 III FTHUB III HDWR-ACC-0100 III HDWR-CAB-0001 III HDWR-CAB-0001 III HDWR-CAB-0001 III HDWR-FGC-0001 III HDWR-LDS-0001 III HDWR-LDS-0001 III HDWR-PNL-0001	99999999999999999999999		
		1 3-D2094A 3-D2657A 3-D2659A	TS-MILEAGE TS-OVTLABOR TS-SHIP	TBBELL100 BK MOUSE	HDWR-PR0-4862			
		<				>		
	9 objects(s) marked. Fabrika	0.20	Items and Item Group	s Page size - 1000	Items			

List view Click the **View List** button on the toolbar to display the items in a list.

Details view Click the **View Details** button on the toolbar to display the description, class, and type of each item.

	🚰 Microsoft Dynamics	GP Catalog M	aintenance					
	<u>File E</u> dit <u>V</u> iew <u>H</u> elp							
View Details button —								
	Standard Catalog	Standard C	atalog: \Compute	ers\Laptops				
	🖃 🍥 Computers	Name		Description		Class	Туре	
	🛛 🍥 Desktops	🕅 INST-T	W0-0001	Installation			Flat Fee	
	🛄 Laptops	🔲 ПСТ-С		Integrated Cir	cuit, PCD85-1		Sales Inventory	
	🛨 \bigotimes Telephones	🕅 KB104		Keyboard			Sales Inventory	
	Printers	🔲 🕅 KPA10	0	Keypad Asser	mbly		Sales Inventory	
	Ť	🔲 М1500		15" Monitor			Sales Inventory	
		🔲 🕅 м1700		17" Monitor			Sales Inventory	
		🔲 M2100		21" Monitor			Sales Inventory	
		🔲 МІС10	-	Microphone			Sales Inventory	
		I MISC-1		Mileage			Misc Charges	
The description, class,		PHAN-		Fax Machine	Package	FINGOO	Sales Inventory	
•		PHAN-		Standard Pho	ine Package	RETAIL	Kit	
and type of each item is		—— 🛄 PHON-		Attractive 712		RETAIL	Sales Inventory	
displayed.		D PHON-		Cordless-Attra		ATT CO	Sales Inventory	
			ATT-53BK		ictive 5352-Black		Sales Inventory	
		PHON-			ictive 5352-Blue	ATT CO	Sales Inventory	
			ATT-53RD		ictive 5352-Red	ATT CO	Sales Inventory	
			ATT-53WH		ictive 5352-White		Sales Inventory	
		PHON-		Phone Base		RETAIL	Sales Inventory	
		PHON-		Handset, 4-lin		RETAIL	Sales Inventory	_
			BUS-1250	Handset,multi	-line	RETAIL	Sales Inventory	
		G Phone:						
		PHON-			ls Free Dual Ear	FINGOO	Sales Inventory	
		PHON-			Free Single Ear	FINGOO	Sales Inventory	
		PHON-	GTE-3458	Memory-Gran	d M3458	RETAIL	Sales Inventory	~
	9 objects(s) marked. Fa	abrikam, Inc.	All	Items and Item 0	àroups F	^o age size - 1000 Items		1

Modify the data block

When you start Catalog Maintenance for the first time, up to 1000 items will be displayed in the details pane. You can change this number by modifying the *data block*. The data block defines how many items will be displayed in the details pane at one time.

For example, you can modify the data block to display 10 items in the details pane. You can then use **Previous Block** and **Next Block** buttons to view the previous or next "block" of 10 items.

Use the following steps to modify the data block.

- 1. Click the **Find Data Block** button on the toolbar. The Find Item/Set Page Size window appears.
- 2. If you want a specific item to be the first item listed in the data block, enter the item's number.
- 3. Enter the number of items you want in the data block (that is, the number of items per page).
- 4. Click OK.
- 5. The data block is displayed in the details pane. To view the previous data block, click the **Previous Block** button on the toolbar. To view the next data block, click the **Next Block** button.

Set up item filters

To limit the number of items displayed in the details pane, you can set up an *item filter*. When you select a department in the console tree that has an item filter applied to it, only the items that meet specific criteria (which you define when setting up the filter) will be displayed in the details pane.

For example, your company may have thousands of inventory items, but only 100 of those items are telephones. You can set up an item filter so that when you select the Telephones department in the console tree, only telephones are displayed in the details pane.

When you set up an item filter, it applies to the department that is selected in the console tree, as well as the departments above and below it. For example, let's say you have the following catalog structure:



If you select Office Phones and set up an item filter, the item filter will be applied to these departments: Telephones, Office Phones, Employee Phones, and Conference Room Phones.

Use the following steps to set up an item filter.

- 1. In the console tree, select the department you want the item filter applied to. Keep in mind, the item filter will be applied to all departments above and below the department you select.
- Choose Edit > Department Tree Item Filter. The Item Filter Maintenance window appears.
- 3. To specify which items will be displayed, select a field, select an operator, and enter a value.

For example, to display only telephones, you could set up the item filter so that only items with the word "phone" in their descriptions will be displayed. Your entries would look like this:

Field: Description

Operator: Equal to

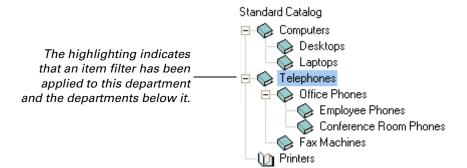
Value: phone



Select the **Match Case** check box if the information you entered in the **Value** field is case-sensitive.

4. Click Save.

The name of the left-most department the item filter is applied to will appear highlighted.



Delete item filters

If you set up an item filter, and now wish to delete it, complete the following steps.

- 1. In the console tree, right-click the department the item filter is applied to.
- 2. Choose Item Filter.
- 3. The Item Filter Maintenance window appears. Click **Delete**.

Chapter 11: Catalog Maintenance administration tasks

The following procedures will help you administer and manage Catalog Maintenance.

- Install sample data
- <u>Remove and reinstall the Catalog Maintenance tables</u>

Install sample data

Sample data is available to use with Catalog Maintenance. Use the following steps to install (or reinstall) the sample data.

- Open Catalog Maintenance. Start > All Programs > Microsoft Dynamics > Catalog Maintenance > Catalog Maintenance
- 2. The Login window appears. Select a data source name to connect to the SQL server for Microsoft Dynamics GP. Then enter your SQL Server user name and password. Click **OK**.
- 3. The Company Select window appears. Select the company for which you'll add sample data. Click **OK**.

The Microsoft Dynamics GP Catalog Maintenance window appears.

- 4. Choose Edit > File Maintenance > Install Sample Data.
- 5. A dialog box appears, informing you that any changes you made to the sample data (that is, if the sample data was already installed) will be overwritten. Click **Yes** to continue.

After the sample data is installed, a sample catalog appears in the console tree.

Remove and reinstall the Catalog Maintenance tables

If you've been using Catalog Maintenance in a testing environment, you may have created several test catalogs. To delete all your test catalogs and departments at one time, you can remove the Catalog Maintenance SQL tables, and then reinstall them. The following steps explain how to do so.

- Open Catalog Maintenance. Start > All Programs > Microsoft Dynamics > Catalog Maintenance > Catalog Maintenance
- 2. The Login window appears. Select a data source name to connect to the SQL server for Microsoft Dynamics GP. Then enter your SQL Server user name and password. Click **OK**.
- 3. The Company Select window appears. Select the company for which you'll remove and reinstall the Catalog Maintenance tables. Click **OK**.

The Microsoft Dynamics GP Catalog Maintenance window appears.

- 4. Choose Edit > File Maintenance > Create/Drop Tables.
- 5. The File Maintenance window appears. Click Drop Tables.
- 6. A dialog box appears, informing you that all catalog data will be removed. Click **Yes** to continue.

Catalog Maintenance will close.

- 7. Restart Catalog Maintenance. Start > All Programs > Microsoft Dynamics > Catalog Maintenance > Catalog Maintenance
- 8. The Login window appears. Select a data source name to connect to the Microsoft Dynamics GP SQL Server. Then enter your SQL Server user name and password. Click **OK**.
- 9. The Company Select window appears. Select the company for which you'll organize inventory items. Click **OK**.
- 10. The File Maintenance window appears. Click Create Tables.

Catalog Maintenance opens. You can install sample data and work with the sample catalog, or you can create your own catalog. For more information, see *Install sample data* on page 47 and <u>Chapter 8, "Catalogs and departments."</u>

Part 4: Order Management setup

This part of the documentation explains setup procedures you must complete in Order Management. Specifically, it explains how to assign Order Management users to groups and roles, and how to configure the options on the Order Management Setup page.

- <u>Chapter 12, "Groups and roles,"</u> explains how to set up your Order Management users and assign them to SharePoint groups and Microsoft Business Framework roles.
- <u>Chapter 13, "Order Management setup options,"</u> explains how to configure the options on the Order Management Setup page. For example, these options determine how quantity shortages, payments, and commissions are handled for orders entered in Order Management.
- <u>Chapter 14, "Order Management URLs,"</u> includes information about the URLs you'll need to provide to your salespeople and customers so they can access Order Management.
- <u>Chapter 15, "Troubleshooting,"</u> lists common issues you may encounter with Order Management, and possible solutions.

Chapter 12: Groups and roles

To use Business Portal, all users must be assigned to both SharePoint groups and Microsoft Business Framework (MBF) roles. SharePoint groups determine the access users have to sites and pages, while MBF roles determine the access that users have to data.

There are three main categories of Order Management users: customers, salespeople, and Order Management administrators. The following information explains the SharePoint groups and MBF roles you'll need to assign these users to.

- <u>Customers</u>
- <u>Salespeople</u>
- <u>Order Management administrators</u>



Only the Business Portal administrator can assign users to SharePoint groups and MBF roles, so you'll need to work with that administrator. Step-by-step instructions are provided in the Business Portal Administrator's Guide.

Customers

To give your customers access to Order Management via an extranet, create Windows user accounts for them. Then assign them to SharePoint groups and MBF roles.

Windows accounts

You must set up Windows user accounts for the customers who will be accessing Order Management. The accounts must be domain accounts or local accounts on the Business Portal web server. For more information about setting up these accounts, see the Business Portal Administrator's Guide.

SharePoint groups and MBF roles

To give your customers access to Order Management, you must assign them to the following SharePoint groups and MBF roles.

SharePoint group	MBF roles
BP Order Management Customer	Order Management Customer
	Customer (advanced role)

Salespeople

To give your salespeople access to Order Management, you must assign them to the following SharePoint groups and MBF roles.

SharePoint group	MBF roles
BP Order Management Salesperson	Order Management Salesperson
	Salesperson (advanced role)

Order Management administrators

Order Management administrators are the users responsible for setting up and maintaining Order Management. Order Management administrators must be assigned to the following SharePoint group and MBF role.

SharePoint group	MBF role
BP Order Management Administrator	Order Management Admin



Keep in mind, Order Management administrators won't be able to enter orders. To enter orders, users must be assigned to the appropriate customer and salesperson MBF roles. For more information, see <u>Customers</u> on page 51 and <u>Salespeople</u> on page 51.

Chapter 13: Order Management setup options

To configure the Order Management application, go to the Order Management Setup page. (You can access this page by going to the Administration Home page on the Business Portal web site. Under **Order Management**, click **Order Management setup**.)

Configure the following options:

- <u>Inventory options</u>
- Document type and quantity shortage options
- <u>Display options</u>
- <u>Batch creation options</u>
- <u>Shipping options</u>
- <u>Customer options</u>
- <u>Commission options</u>
- <u>Payment options</u>
- <u>Image options</u>

Inventory options

On the Order Management Setup page, configure the following inventory options:

Order from Site Click the lookup button to open the Sites page. Select the site that will be used for allocating item quantities for each order.

If you're allocating by line item, and a quantity shortage exists at this site, the shortage will be handled according to the option you select in <u>Document type and</u> <u>quantity shortage options</u> on page 54.

If you're allocating by document or batch, quantity shortages will not be addressed in Order Management. For more information, see <u>Allocation methods and quantity</u> <u>shortages</u> on page 23.

Display Quantity Available Select this check box if you want to display the quantity available for each item on the Items page.

Display Quantities for If you selected the **Display Quantity Available** check box, specify whether you want an item's quantity available information to represent the total inventory from all sites, or only the total inventory from the site you selected in the **Order from Site** field.

Document type and quantity shortage options

On the Order Management Setup page, configure the following options:

Document Type ID Select the document type ID you created for orders placed through Order Management. (This is the ID you created in <u>Chapter 5, "Document type IDs."</u>)

Item Quantity Shortage If the document type ID that you selected is configured to allocate by line item, you must select one of the following options for processing item quantity shortages.

Select this option	То:
Override Shortages	Sell the quantity entered, regardless of the quantity available at the site selected in the Order from Site field.
	The quantity will appear in the Qty to Invoice field in the Microsoft Dynamics GP Sales Transaction Entry window. The quantity will appear as a negative number in the Quantity Available field in the Item Maintenance window.
Back Order All	Back order the entire quantity for the item. For example, if a customer ordered 30 items, and you have only 25 in inventory at the selected site, you will back order all 30 items.
	The quantity will appear in the Quantity Ordered and Qty to Back Order fields in the Microsoft Dynamics GP Sales Transaction Entry window. You'll have to transfer the document to create the back order.
Back Order Balance	Back order the quantity that isn't available. For example, if a customer ordered 30 items, and you have only 25 in inventory at the selected site, you'd sell the 25 items you have on hand and back order the remaining five.
	Thirty will appear in the Quantity Ordered field, 25 will appear in the Qty to Invoice field, and five will appear in the Qty to Back Order field in the Microsoft Dynamics GP Sales Transaction Entry window. You'll have to transfer the document to create the back order.
Cancel All	Cancel the entire item quantity.
	The quantity will appear in the Quantity Canceled field in the Microsoft Dynamics GP Sales Transaction Entry window.

If the document type ID that you selected is configured to allocate by document or batch, quantity shortages will not be addressed in Order Management. For more information, see <u>Allocation methods and quantity shortages</u> on page 23.

Kit Quantity Shortage If the document type ID that you selected is configured to allocate by line item, select one of the following options for processing kit quantity shortages.

Select this option	То:			
Override Shortages	Sell the quantity entered, regardless of the quantity at the site selected in the Order from Site field. The quantity shortage for every component in the kit will be overridden.			
	The quantity will appear in the Qty to Invoice field in the Microsoft Dynamics GP Sales Transaction Entry window. The quantity will appear as a negative number in the Quantity Available field in the Item Maintenance window.			
Back Order All	Back order all the components of the kit item. For example, let's say you have a kit with three component items, one of which is out of stock. If a customer tries to purchase the kit item, the entire quantity of all components will be back ordered.			
	The quantity will appear in the Quantity to Back Order field in the Microsoft Dynamics GP Sales Transaction Entry window; the component quantity will appear in the To Back Order field for each component in the Sales Kit Options window. The kit quantity will remain the same so that you can view the original quantity requested. You'll have to transfer the document to create the back order.			
Cancel All	Cancel the entire kit quantity.			
	The quantity will appear in both the document quantity field and the Quantity Canceled field in the Sales Transaction Entry window and the component quantity will appear in the Quantity Canceled field for each component in the Sales Kit Options window.			

Display options

On the Order Management Setup page, configure the following display options:

Display Tax Detail Select this check box if you want salespeople and customers to see tax details on their orders.

Display Price Options Based on Select one of the following options.

Select this option	То:
Customer Pricing Method	Sell the same item at different prices to different customers. For example, you can sell a computer for \$2,500 to a retail customer, and sell the same computer for \$1,500 to a wholesale customer. If you select the Customer Pricing Method option, be sure that
	you've set up customer-specific pricing in Microsoft Dynamics GP. For more information, see <u>Chapter 7, "Customer-specific pricing."</u>
List Price	Sell each item according to the list price defined in Microsoft Dynamics GP. For information on entering list prices, see <u>Enter item</u> <u>prices</u> on page 18.

Number of Customers to Display per Page When a salesperson enters an order, he or she must specify which customer the order is for by selecting the customer in the Customers lookup page. Specify the number of customers you want listed on the Customers lookup page at one time.

For example, if you enter **20**, twenty records will be shown at one time. Users can click the **Previous** and **Next** links to view the previous or next twenty records.

	Lookup Customer Business Portal - Ord Customers				Help
				<i>P</i>	Find
	Customer ID	Name	Salesperson ID	Phone 1	
Specify how many records to display in this — lookup window.	AARONFIT0001	Aaron Fitz Electrical	PAUL W.	(425) 555-0101	^
	ADAMPARK0001	Adam Park Resort	GREG E.	(317) 555-0102	
	ADVANCED0001	Advanced Paper Co.	PAUL W.	(312) 555-0103	
	ADVANCED0002	Advanced Tech Satelli	GARY W.	(416) 555-0104	
	ALTONMAN0001	Alton Manufacturing	GREG E.	(313) 555-0108	_
	AMERICAN0001	American Science Mus	PAUL W.	(314) 555-0106	
	AMERICAN0002	American Electrical C	NANCY B.	(319) 555-0107	
	ASSOCIAT0001	Associated Insurance	NANCY B.	(402) 555-0108	
	ASTORSUI0001	Astor Suites	GREG E.	(219) 555-0109	
	ATMORERE0001	Atmore Retirement C	PAUL W.	(309) 555-0110	
	BAKERSEM0001	Baker's Emporium Inc.	GREG E.	(219) 555-0111	
	BERRYMED0001	Berry Medical Center	SANDRA M.	(414) 555-0113	
	BLUEYOND0001	Blue Yonder Airlines	NANCY B.	(316) 555-0161	t 🕨

If you enter 0, all customers will be displayed on the Customers lookup page.

Number of Items to Display per Page When a customer or salesperson enters an order, he or she can select an item from the Items lookup page. Specify the number of items you want listed on the Items lookup page at one time.

For example, if you enter **20**, twenty records will be shown at one time. Users can click the **Previous** and **Next** links to view the previous or next twenty records.

If you enter **0**, all items will be displayed in the Items lookup page.

Batch creation options

Order Management transactions are entered in Sales Order Processing batches in Microsoft Dynamics GP. On the Order Management Setup page, configure the following batch creation options:

Create a New Batch Every Specify how often a new Order Management batch will be created in Microsoft Dynamics GP: hourly, daily, or weekly.

Start Day If you chose to create a new batch weekly, specify the day of the week on which new batches will be created.

Default Batch Prefix Enter a batch prefix to identify batches containing Order Management transactions.

Shipping options

On the Order Management Setup page, you can select one of the following shipping options:

Allow Shipping Address Change If you select this option, customers and salespeople can enter a new shipping address on orders. The new shipping address will be applied to the current order only—it won't be saved for use on future orders.

To view the new shipping address in Microsoft Dynamics GP, open the Sales Customer Detail Entry window. Click the icon next to the **Ship To Address ID** field to view the address.

Allow Multiple Ship to Addresses per Order If you select this option, customers and salespeople can select a ship-to address, shipping method, and requested ship date for each line item on their orders.

If you don't select one of these options, customers and salespeople must select an existing shipping address ID. All items on the order will be shipped to this address.

Customer options

When a salesperson enters an order for a new customer, the salesperson enters the customer's address on the Add Customer page.

As the Order Management administrator, you must specify the address ID that will be assigned to this address in Microsoft Dynamics GP. (An address cannot be saved to the Microsoft Dynamics GP database without an address ID.)

A salesperson enters a customer's address on this page. As the Order _____ Management administrator, you need to specify the address ID that will be assigned to this address.

To create a new custome If you leave the Custome	[,] record, enter the following information. r ID field blank, a Customer ID will be autor	matically generated.
Customer Class	AUSTRALIA-T8	
Customer ID		
Customer Name *		
Contact Name *		
Street 1 *		
Street 2		
Street 3		
City *		
State/County/Province *		
Postal Code *		
Country/Region *		
Phone 1		
Phone 2		
Fax		
E-Mail		
* Indicates required field		

Enter the address ID in the **Address ID for New Customers** field on the Order Management Setup page.

Commission options

Use the commission options on the Order Management Setup page to specify which customers salespeople can enter orders for, and how commissions are credited.

Specifying which customers salespeople can enter orders for

To specify which customers salespeople can enter orders for, select one of the following options:

- If you select **Assigned-to Customers only**, salespeople can enter orders (and view order statuses) for only the customers they are assigned to.
- If you select **All Customers**, salespeople can enter orders (and view order statuses) for any customer.

Specifying how commissions are credited

If you allow salespeople to enter orders for any customer, you'll need to specify how commissions are credited. Select one of the following options:

- If you select **Salesperson assigned to customer**, commissions are credited to the salesperson assigned to the customer, regardless of who enters the order. To view the salesperson assigned to a specific customer, open the Customer Maintenance window in Microsoft Dynamics GP.
- If you select **Salesperson entering order**, commissions are credited to the salesperson entering the order, regardless of whether the salesperson is assigned to the customer.

Payment options

Customers can pay for orders submitted through Order Management by credit card or on account. There is nothing you need to do to enable customers to pay on account. However, if you want to accept credit card payments, configure the following options on the Order Management Setup page:

Allow Payment by Credit Card Select this check box if you will accept credit card payments.



You cannot select the **Allow Payment by Credit Card** check box until Secure Sockets Layer (SSL) has been set up on your Business Portal web server. For more information about SSL, see <u>Secure Sockets Layer</u> on page 11.

User ID Click the lookup button to open the Users window. The Users window displays a list of Microsoft Dynamics GP user IDs. Select the user ID to associate with the posting of credit card payments to General Ledger. This user ID is primarily for audit trail purposes.

Image options

To display images of your inventory items in Order Management, you must specify the location of your image files in the **Image URL** field.

Use the following format:

\BusinessPortal\Applications\OrderManagement\Images

For more information on how to display images, see *Display item images* on page 20.

Chapter 14: Order Management URLs

After you have set up Order Management, your salespeople and customers can begin entering orders. The following sections include information about the URLs you'll need to provide to your salespeople and customers so they can access Order Management:

- <u>URL for salespeople</u>
- <u>URL for customers</u>

URL for salespeople

When you are ready for salespeople to begin using Order Management, provide them with the following URL:

http://<ServerName>/BP/Sales

If you've configured Business Portal to use Secure Sockets Layer (SSL), the URL is:

https://<ServerName>/BP/Sales



ServerName is the name of the server on which Business Portal is installed.

This URL directs users to the Sales Center Home page in Business Portal. Users can then click the **Order Entry** link on the Quick Launch to open the Order Entry page, where they can begin entering orders.

URL for customers

When you are ready for customers to begin using Order Management, provide them with the following URL:

http://<ServerName>/BP/Orders

If you've configured Business Portal to use Secure Sockets Layer (SSL), the URL is:

https://<ServerName>/BP/Orders



ServerName is the name of the server on which Business Portal is installed.

This URL directs users to the Order Entry page, where they can begin entering orders.

Chapter 15: Troubleshooting

You may encounter problems that prevent Order Management from working properly. The following is a list of common issues you may encounter, and possible solutions.

- <u>Problem with your order</u>
- <u>There are no items to display</u>
- <u>Updates to catalogs and departments are not displayed</u>

Problem with your order

The Problem With Your Order page is displayed to a user when an order cannot be completed. To determine why an order cannot be completed, review the information on the Windows event viewer.

Use the following steps to display the Windows event viewer.

- Open the Event Viewer console.
 Start > Administrative Tools > Event Viewer
- 2. In the console tree, select Application.
- 3. In the details pane, double-click any errors that have **Order Management** in the **Source** column.

The Event Properties window will display, providing a description of the error.

There are no items to display

Users may receive an error messaging saying, "There are no items to display" when trying to add items to their orders. This error may indicate that:

Order Management was not able to calculate item prices for that customer. Verify that a price level has been entered in the Customer Maintenance or Receivables Management Setup window in Microsoft Dynamics GP.

You need to reset your password in eConnect. During the eConnect installation, you entered a Windows user name and password. If the password for this account changed, you need to enter the new password in Component Services.

Use the following steps to enter your new password for eConnect.

- Open the Component Services console.
 Start > Administrative Tools > Component Services
- In the console tree, choose Component Services > Computers > My Computer > COM+ Applications > Miscellaneous Routines for Microsoft Dynamics Business Portal.
- 3. Right-click **Miscellaneous Routines for Microsoft Dynamics Business Portal** and choose **Properties**.

- 4. The Miscellaneous Routines for Microsoft Dynamics Business Portal Properties window appears. Click the **Identity** tab.
- 5. Enter and confirm your new password. Click **OK**.

Updates to catalogs and departments are not displayed

If you've made updates in Catalog Maintenance—such as creating new departments or assigning new items to a department—and these changes aren't being reflected in Order Management, users may need to delete their temporary Internet files.

Some Business Portal pages are cached by Internet Explorer. These temporary files need to be deleted so that new versions will be displayed instead.

Internet Explorer options are set per user on each computer. If multiple users share a single client workstation, temporary files will need to be deleted with each of the users logged in to the workstation.

To delete temporary Internet files:

- Start Internet Explorer and open the Internet Options window. Tools > Internet Options
- 2. On the General tab, in the Temporary Internet files section, click Delete Files.
- 3. The Delete Files window appears. Select the **Delete all offline content** check box.
- 4. Click **OK** to delete the files and close the Delete Files window.

Deleting files may take some time, depending on the number of temporary files on the computer.

5. Click **OK** to close the Internet Options window.

If the changes you've made in Catalog Maintenance are still not displayed in Order Management, you may need to reset IIS.

To reset IIS:

- 1. Choose **Start** > **Run**.
- 2. Type iisreset. Click OK.

Part 5: Groups and roles reference

This information provides details about the SharePoint groups and MBF roles that are used with Order Management.

• <u>Chapter 16, "Default group and role permissions,"</u> lists the default permissions associated with the SharePoint groups and MBF roles used with Order Management.

Chapter 16: Default group and role permissions

This information lists the default permissions associated with the SharePoint groups and MBF roles that are used with Order Management.

For more information about SharePoint groups and MBF roles, see the Business Portal Administrator's Guide.

This information is divided into the following sections:

- <u>SharePoint groups</u>
- <u>MBF roles</u>
- <u>Advanced MBF roles</u>

SharePoint groups

SharePoint groups are used to grant access to Business Portal sites and pages. The permission levels associated with each group define the level of control users have over the securable items on those pages, such as web parts.



SharePoint permission levels control whether users can modify SharePoint content, such as pages and document libraries. For example, a user who has the Read permission level for a page can't modify the page or the web parts on it. Permission levels do not affect a user's access to Microsoft Dynamics GP data. This means that a user with the Read permission level for a page still may be able to create transactions, modify records, or delete entries using that page.

The following table lists the SharePoint groups that are installed with Order Management, and includes the pages and permission levels associated with each group.

Group	Site	Page library	Page	Permission level
BP Order Management Administrator	Top-level Business Portal site	Order Management Pages	Order Management Setup	Read
	Orders	Order Management External Pages	Complete Order	Read
			Item Details	Read
			Items	Read
			Order Confirmation	Read
			Order Details	Read
			Order Entry	Read
			Problem With Your Order	Read
			Shopping Cart	Read
		Order Management Internal Pages	Complete Order	Read
			Item Details	Read
			Items	Read
			Order Confirmation	Read
			Order Details	Read
			Order Entry	Read
			Problem With Your Order	Read
			Shopping Cart	Read
		Sales Center Common Pages	Sales Center Home	Contribute

Group	Site	Page library	Page	Permission level
BP Order	Orders	Order Management External Pages	Complete Order	Read
Management Customer			Item Details	Read
			Items	Read
			Order Confirmation	Read
			Order Details	Read
			Order Entry	Read
			Problem With Your Order	Read
			Shopping Cart	Read
BP Order Sales Cer Management Salesperson	Sales Center	onter Order Management Internal Pages	Complete Order	Read
			Item Details	Read
			Items	Read
			Order Confirmation	Read
			Order Details	Read
			Order Entry	Read
			Problem With Your Order	Read
			Shopping Cart	Read
		Sales Center Common Pages	Sales Center Home	Read

MBF roles

MBF roles are used to grant access to Business Portal data. The data permissions associated with each role control access to the back office data that can be displayed in Business Portal.

The following table lists the MBF roles that are installed with Order Management, and includes the data permissions associated with each role.

Role	Data permissions
Order Management Admin	CreditCard - All
	Customer - All
	CustomerClass - All
	Item - All
	ItemQuantities - All
	SalesOrderDocument - All
	ShippingMethod - All
	Site - All
	User - BackOfficeUser
Order Management	CreditCard - All
Customer	CustomerClass - All
	ItemQuantities - All
	SalesDocument - Order Management Customer
	ShippingMethod - All
Order Management	CreditCard - All
Salesperson	Customer - All
	CustomerClass - All
	Item - All
	ItemQuantities - All
	SalesDocument - Order Management Salesperson
	SalesOrderDocument - All
	ShippingMethod - All

Advanced MBF roles

Advanced MBF roles map Business Portal users to specific IDs in the back office, such as employee or salesperson IDs. This allows these users to access their personal data—for example, employee paystubs or salesperson commission information. The data permissions associated with each advanced role control access to the back office data that can be displayed in Business Portal.

The following table lists the advanced roles that are used with Order Management.

Role	Data permissions
Customer	This role is installed with Business Portal. For a list of data permissions associated with this advanced role, see the Business Portal Administrator's Guide.
Salesperson	This role is installed with Business Portal. For a list of data permissions associated with this advanced role, see the Business Portal Administrator's Guide.

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