# Manager Reference: Catalog

Authors:

David Jones

Les Austin

Copyright 2004 Undersun Consulting LLC

.1: Introduction . . . . . 1
.1.1: main . . . . . 1
.1.2: Discussion of the Main screen . . . . . 1
.1.3: Navigation Panel . . . . . 1
.1.4: Some symbols used as shortcuts . . . . . 2
.1.4.1: Brackets [ ] . . . . . 2
.1.4.2: Greater-than symbols >> . . . . . 2
.1.4.3: The Asterisk * . . . . . 2
.2: Search Products . . . . . 3
.2.1: SearchProducts . . . . . 3
.2.2: link buttons . . . . . 3
.2.3: by Keywords . . . . . 3
.2.3.1: Discussion . . . . . 3
.2.3.2: Results of search . . . . . 3
.2.3.2.1: keywordsearch-results . . . . . 3
.2.3.2.2: link buttons . . . . . 4
.2.3.2.3: List of found products . . . . . 4
.2.3.2.4: Create Virtual Product . . . . . 4
.2.3.2.5: Remove Results from Category . . . . . 5
.2.3.2.6: Expire Results from Category . . . . . 5
.2.3.2.7: Add results to category . . . . . 5
.2.3.2.8: Add Feature to Results . . . . . 5
.2.3.2.9: Remove Feature from Results . . . . . 5
.2.4: by Category ID . . . . . 5
.2.4.1: categorysearch-results . . . . . 5
.2.4.2: Discussion . . . . . 6
.2.5: Advanced Search . . . . . 6
.2.5.1: Category ID . . . . . 7
.2.5.2: Select a Category (drop-down box) . . . . . 7
.2.5.3: advancedsearch . . . . . 7
.2.5.4: link buttons . . . . . 7
.2.5.5: Advanced Search tools . . . . . 7
.2.5.5.1: Category (drop-down box) . . . . . 7
.2.5.5.2: Keywords . . . . . 8
.2.5.5.3: Feature IDs (3 choices) . . . . . 8
.2.5.5.4: Amount (drop-down box) . . . . . 8
.2.5.5.5: Color (drop-down box) . . . . . 8
.2.5.5.6: Hazmat ()drop-down box) . . . . . 8
.2.5.5.7: License (drop-down box) . . . . . 8
.2.5.5.8: Size (drop-down box) . . . . . 8
.2.5.5.9: Style (drop-down box) . . . . . 8
.2.5.5.10: Type (drop-down box) . . . . . 8

.2.5.5.11: Supplier (drop-down box) . . . . . 8
.2.5.5.12: Sort Order (drop-down box) . . . . . 8
.2.5.5.13: Last Search . . . . . 8
.2.6: Product Jump . . . . . 8
.2.6.1: Item sought . . . . . 9
.2.6.2: Jump-to box . . . . . 9
.2.6.3: Found-Example . . . . . 9
.2.7: Product Found! . . . . . 9
.2.7.1: Discussion . . . . . 9
.2.7.2: Product-Found . . . . . 9
.3: Browse Catalogs . . . . . 11
.3.1: Catalog Detail List . . . . . 11
.3.2: FindProdCatalog . . . . . 11
.3.3: link buttons . . . . . 11
.3.4: Table of Existing Catalogs . . . . . 11
.3.4.1: Catalog Name ID . . . . . 11
.3.4.2: Use Quick Add? . . . . . 11
.3.4.3: Edit catalog . . . . . 11
.3.4.3.1: EditProdCatalog . . . . . 11
.3.4.3.2: link buttons . . . . . 12
.3.4.3.3: Discussion . . . . . 12
.3.5: Catalog Categories . . . . . 12
.3.5.1: Discussion . . . . . 12
.3.5.2: EditCategory . . . . . 12
.3.5.3: link buttons . . . . . 13
.4: Browse Categories . . . . . 14
.4.1: Categories With No Parent Category . . . . . 14
.4.1.1: ChooseTopCategory . . . . . 14
.4.1.2: Choose category . . . . . 14
.4.2: Edit Category . . . . . 14
.4.2.1: EditCategory . . . . . 14
.4.2.2: link buttons . . . . . 15
.4.2.3: Details follow . . . . . 15
.5: Category Products . . . . . 16
.5.1: CategoryProducts . . . . . 16
.6: Main: Catalog Administration Main Page . . . . . 17
.6.1: main . . . . . 17
.6.2: link buttons . . . . . 17
.6.3: Opening Screen . . . . . 17
.6.4: Edit Catalog with Catalog ID: . . . . . 18
.6.5: Edit Category with Category ID: . . . . . 18
.6.6: Edit Product with Product ID: . . . . . 18

.6.7: Find Product with ID Value: ..... 18
.6.7.1: FindProductByID ..... 18
.6.7.2: link buttons ..... 18
.6.8: Auto Create Keywords for All Products ..... 18
.6.9: Fast Load Catalog into Cache ..... 18
.6.9.1: Resulting code report after loading cache: ..... 19
.7: Catalog - Edit Product Catalog screens ..... 20
.7.1: Discussion of the Edit Catalog screens ..... 20
.7.2: Catalog ..... 20
.7.2.1: EditProdCatalog ..... 20
.7.2.2: link buttons ..... 20
.7.2.3: Prod Catalog ID ..... 20
.7.2.4: Catalog Name ..... 20
.7.2.5: Use Quick Add (Y/N) ..... 21
.7.2.6: Style Sheet ..... 21
.7.2.7: Header Logo ..... 21
.7.2.8: Content Path Prefix ..... 21
.7.2.9: Template Path Prefix ..... 21
.7.3: Stores ..... 21
.7.3.1: EditProdCatalogStores ..... 21
.7.3.2: link buttons ..... 21
.7.3.3: Table of existing stores ..... 22
.7.3.3.1: Store ID ..... 22
.7.3.3.2: From Date and Time ..... 22
.7.3.3.3: Thru Date and Time (popup calendar) ..... 22
.7.3.3.4: Sequence Num ..... 22
.7.3.4: Tool to add stores ..... 22
.7.3.4.1: Store (drop-down box) ..... 22
.7.3.4.2: From Date (popup calendar) ..... 22
.7.3.4.3: Thru Date (popup calendar) ..... 22
.7.3.4.4: Sequence Num ..... 22
.7.4: Parties ..... 22
.7.4.1: EditProdCatalogParties ..... 22
.7.4.2: link buttons ..... 23
.7.4.3: Table of existing parties ..... 23
.7.4.3.1: Party ..... 23
.7.4.3.2: Role ..... 23
.7.4.3.3: From Date and Time ..... 23
.7.4.3.4: Thru Date and Time (popup calendar) ..... 23
.7.4.3.5: Sequence Num ..... 24
.7.4.4: Tool to add parties ..... 24
.7.4.4.1: Party ID ..... 24

.7.4.4.2: Role Type ID (drop-down box) ..... 24
.7.4.4.3: From Date (popup calendar) ..... 24
.7.4.4.4: Thru Date (popup calendar) ..... 24
.7.4.4.5: Sequence Num ..... 24
.7.5: Categories ..... 24
.7.5.1: EditProdCatalogCategories ..... 24
.7.5.2: link buttons ..... 25
.7.5.3: Table of existing Categories ..... 25
.7.5.3.1: Product Category ID ..... 25
.7.5.3.2: Type ..... 25
.7.5.3.3: From Date and Time ..... 26
.7.5.3.4: Thru Date/Time (popup calendar) ..... 26
.7.5.3.5: Sequence Num ..... 26
.7.5.4: Tool to Add Catalog Product Category ..... 26
.7.5.4.1: Product Category ID (drop-down box) ..... 26
.7.5.4.2: Prod Catalog Category Type Id (drop-down box) ..... 26
.7.5.4.3: From Date (popup calendar) ..... 26
.7.5.4.4: Thru Date (popup calendar) ..... 26
.7.5.4.5: Sequence Num ..... 26
.8: Category - Edit Category screens ..... 27
.8.1: Category ..... 27
.8.1.1: EditCategory ..... 27
.8.1.2: link buttons ..... 27
.8.1.3: Product Category ID ..... 28
.8.1.4: Product Category Type (drop-down box) ..... 28
.8.1.5: Name ..... 28
.8.1.6: Description ..... 28
.8.1.7: Category Image URL ..... 28
.8.1.8: Link One Image URL ..... 28
.8.1.9: Link Two Image URL ..... 28
.8.1.10: Detail Screen ..... 28
.8.1.11: Primary Parent Category (drop-down box) ..... 28
.8.1.12: Upload Category Image ..... 28
.8.1.13: Duplicate a Product Category ..... 28
.8.1.14: New Category screen ..... 28
.8.1.14.1: EditCategory-new ..... 28
.8.1.15: Create Product in Category screen ..... 29
.8.1.15.1: createProductInCategoryStart ..... 29
.8.1.15.2: link buttons ..... 30
.8.1.15.3: Internal Name ..... 30
.8.1.15.4: Product Name ..... 30
.8.1.15.5: Short Description ..... 30

.8.1.15.6: Default Price ..... 30
.8.1.15.7: Average Cost ..... 30
.8.1.15.8: Check Existing screen ..... 30
.8.1.16: Search In Category screen ..... 31
.8.1.16.1: advancedsearch-inCategory ..... 31
.8.1.16.2: Discussion ..... 32
.8.1.17: Category Page ..... 32
.8.1.17.1: category ..... 32
.8.2: Content ..... 33
.8.2.1: editCategoryContent ..... 33
.8.2.2: link buttons ..... 35
.8.2.3: Table of existing content ..... 35
.8.2.3.1: Content ..... 35
.8.2.3.2: Type ..... 35
.8.2.3.3: From ..... 35
.8.2.3.4: Thru ..... 35
.8.2.3.5: Purchase From ..... 35
.8.2.3.6: Purchase Thru ..... 35
.8.2.3.7: Use Count ..... 35
.8.2.3.8: Use Days ..... 35
.8.2.3.9: Note on Edit Content link ..... 35
.8.2.4: Create New Category Content ..... 35
.8.2.4.1: Content Type ID (drop-down box) ..... 35
.8.2.4.2: Use Days Limit ..... 35
.8.2.4.3: prepareAddContentToCategory ..... 35
.8.2.5: Add Content to Category (tool) ..... 36
.8.2.5.1: Content ID ..... 36
.8.2.5.2: Content Type ID (drop-down box) ..... 36
.8.2.5.3: From Date (popup calendar) ..... 36
.8.2.5.4: Thru Date (popup calendar) ..... 36
.8.2.5.5: Purchase From Date (popup calendar) ..... 36
.8.2.5.6: Purchase Thru Date (popup calendar) ..... 36
.8.2.5.7: Use Count Limit ..... 37
.8.2.5.8: Use Days Limit ..... 37
.8.2.6: Override Simple Fields ..... 37
.8.2.6.1: Product Category Type (drop-down box) ..... 37
.8.2.6.2: Description ..... 37
.8.2.6.3: Long Description ..... 37
.8.2.6.4: Detail Screen ..... 37
.8.2.7: Edit Category Content ..... 37
.8.2.7.1: EditCategoryContentContent ..... 37
.8.2.7.2: link buttons ..... 38

.8.2.7.3: Discussion ..... 38
.8.2.7.4: Data fields ..... 38
.8.2.8: EditContent ..... 38
.8.3: Rollup ..... 39
.8.3.1: EditCategoryRollup ..... 39
.8.3.2: link buttons ..... 40
.8.3.3: Category Rollup: Parent Categories ..... 40
.8.3.3.1: Parent Category ID ..... 40
.8.3.3.2: From Date ..... 40
.8.3.3.3: Thru Date / Time (popup calendar) ..... 40
.8.3.3.4: Sequence ..... 41
.8.3.3.5: Tool to Add a Parent Category ..... 41
.8.3.4: Category Rollup: Child Categories ..... 41
.8.3.4.1: Child Category ID ..... 41
.8.3.4.2: From Date ..... 41
.8.3.4.3: Thru Date / Time (popup calendar) ..... 41
.8.3.4.4: Sequence ..... 41
.8.3.4.5: Tool to Add a Child Category ..... 41
.8.4: Products ..... 41
.8.4.1: EditCategoryProducts ..... 41
.8.4.2: link buttons ..... 42
.8.4.3: Table of Products for this Category ..... 42
.8.4.3.1: Product Name ID ..... 42
.8.4.3.2: From Date and Time ..... 42
.8.4.3.3: Thru Date/Time (popup calendar) ..... 42
.8.4.3.4: Sequence ..... 43
.8.4.3.5: Quantity ..... 43
.8.4.4: Add Product Category Member ..... 43
.8.4.4.1: Product ID ..... 43
.8.4.4.2: From Date (popup calendar) ..... 43
.8.4.5: Copy Product Category Members to Another Category ..... 43
.8.4.5.1: Target Product Category (drop-down box) ..... 43
.8.4.5.2: Optional Filter with Date (popup calendar) ..... 43
.8.4.5.3: Include Sub-Categories? (Y/N) ..... 43
.8.4.6: Expire All Product Members ..... 43
.8.4.6.1: Optional Expiration Date (popup calendar) ..... 43
.8.4.7: Remove Expired Product Members ..... 43
.8.4.7.1: Optional Expired Before Date (popup calendar) ..... 43
.8.5: Catalogs ..... 43
.8.5.1: EditCategoryProdCatalogs ..... 44
.8.5.2: link buttons ..... 44
.8.5.3: Table of Catalogs ..... 44

.8.5.3.1: Catalog Name ID ..... 44
.8.5.3.2: Type ..... 44
.8.5.3.3: From Date and Time ..... 44
.8.5.3.4: Thru Date / Time (popup calendar) ..... 44
.8.5.3.5: Sequence ..... 44
.8.5.4: Add Catalog to Product Category ..... 45
.8.5.4.1: Catalog (drop-down box) ..... 45
.8.5.4.2: Type (drop-down box) ..... 45
.8.5.4.3: From Date (popup calendar) ..... 45
.8.6: Features ..... 45
.8.6.1: EditCategoryFeatureCats ..... 45
.8.6.2: link buttons ..... 45
.8.6.3: Table of Feature Groups ..... 46
.8.6.3.1: Feature Group ..... 46
.8.6.3.2: From Date and Time ..... 46
.8.6.3.3: Thru Date and Time (popup calendar) ..... 46
.8.6.4: Apply Feature Group to Product Category ..... 46
.8.6.4.1: Feature Groups (drop-down box) ..... 46
.8.6.4.2: From Date and Time (popup calendar) ..... 46
.8.6.5: Table of Feature Categories ..... 46
.8.6.5.1: Feature Category ..... 46
.8.6.5.2: From Date and Time ..... 46
.8.6.5.3: Thru Date and Time (popup calendar) ..... 46
.8.6.6: Apply Feature Category to Product Category ..... 46
.8.6.6.1: Feature Category (drop-down box) ..... 46
.8.6.6.2: From Date (popup calendar) ..... 46
.8.7: Parties ..... 46
.8.7.1: EditCategoryParties ..... 46
.8.7.2: link buttons ..... 47
.8.7.3: Table of Party IDs ..... 47
.8.7.3.1: Party ID ..... 47
.8.7.3.2: Role ..... 47
.8.7.3.3: From Date and Time ..... 47
.8.7.3.4: Thru Date and Time (popup calendar) ..... 48
.8.7.4: Associate Party to Category ..... 48
.8.7.4.1: Party ID ..... 48
.8.7.4.2: Type (drop-down box) ..... 48
.8.7.4.3: From Date (popup calendar) ..... 48
.8.8: Attributes ..... 48
.8.8.1: EditCategoryAttributes ..... 48
.8.8.2: link buttons ..... 49
.8.8.3: Tool to create attributes ..... 49

.8.8.3.1: Product Category ID ..... 49
.8.8.3.2: Attr Name ..... 49
.8.8.3.3: Attr Value ..... 49
.8.8.4: Table of Attributes ..... 49
.8.8.4.1: Attr Name ..... 49
.8.8.4.2: Attr Value ..... 49
.9: Product - new Product or edit ..... 50
.9.1: Discussion ..... 50
.9.2: Product ..... 50
.9.2.1: EditProduct ..... 50
.9.2.2: link buttons ..... 52
.9.2.3: Product ID ..... 52
.9.2.4: Is VIRTUAL Product? (Y/N) ..... 52
.9.2.4.1: Virtual products with Variants ..... 52
.9.2.5: Is VARIANT Product? (Y/N) ..... 52
.9.2.6: Product Type (drop-down box) ..... 52
.9.2.7: Primary Category (drop-down box) ..... 52
.9.2.8: Internal Name ..... 52
.9.2.9: Brand Name ..... 52
.9.2.10: OEM Party ID ..... 52
.9.2.11: Comments ..... 52
.9.2.12: Introduction Date (popup calendar) ..... 52
.9.2.13: Sales discontinuation Thru Date (popup calendar) ..... 53
.9.2.14: Support Thru Date (popup calendar) ..... 53
.9.2.15: Disc. When Inv. Not Avail? (Y/N) ..... 53
.9.2.16: Requirement Method Enum ID ..... 53
.9.2.17: Require Inventory? (Y/N) ..... 53
.9.2.18: Inventory Message ..... 53
.9.2.19: Rating Type Enum (drop-down box) ..... 53
.9.2.20: Rating ..... 53
.9.2.21: Require Amount (Y/N) ..... 53
.9.2.22: Amount Uom Type ID (drop-down box) ..... 53
.9.2.23: Product Height ..... 53
.9.2.24: Height Uom ID (drop-down box) ..... 53
.9.2.25: Product Width ..... 53
.9.2.26: Width Uom ID (drop-down box) ..... 53
.9.2.27: Product Depth ..... 54
.9.2.28: Depth Uom ID (drop-down box) ..... 54
.9.2.29: Weight ..... 54
.9.2.30: Weight Uom ID (drop-down box) ..... 54
.9.2.31: Quantity Included ..... 54
.9.2.32: Quantity Uom ID (drop-down box) ..... 54

.9.2.33: Pieces Included ..... 54
.9.2.34: Returnable? (Y/N) ..... 54
.9.2.35: Include In Promotions? (Y/N) ..... 54
.9.2.36: Taxable? (Y/N) ..... 54
.9.2.37: Tax Category ..... 54
.9.2.38: Tax Vat Code ..... 54
.9.2.39: Tax Duty Code ..... 54
.9.2.40: Charge Shipping? (Y/N) ..... 54
.9.2.41: AutoCreate Keywords? (Y/N) ..... 55
.9.2.42: Content Info Text ..... 55
.9.2.43: Last Modified By ..... 55
.9.2.44: Created By ..... 55
.9.2.45: Duplicate Product ..... 55
.9.2.46: ProductUpdateProductVariants ..... 55
.9.2.47: Advanced Products ..... 55
.9.2.47.1: Introduction ..... 55
.9.2.47.2: More processes ..... 55
.9.2.47.3: Explanation ..... 55
.9.3: Prices ..... 56
.9.3.1: EditProductPrices ..... 56
.9.3.2: link buttons ..... 57
.9.3.3: General discussion of prices ..... 57
.9.3.3.1: Required prices ..... 57
.9.3.3.2: Average Cost and other prices ..... 57
.9.3.3.3: Price Unit of Measure ..... 58
.9.3.4: Table of assigned prices ..... 58
.9.3.4.1: Price Type ..... 58
.9.3.4.2: Purpose ..... 58
.9.3.4.3: Currency ..... 58
.9.3.4.4: Product Store Group ..... 58
.9.3.4.5: From Date and Time ..... 58
.9.3.4.6: Thru Date (popup calendar) ..... 58
.9.3.4.7: Price ..... 58
.9.3.4.8: Term UOM (drop-down box) ..... 58
.9.3.4.9: Last Modified by - On ..... 58
.9.3.5: Tool to assign prices ..... 58
.9.3.5.1: Price Type (drop-down box) ..... 59
.9.3.5.2: Purpose ..... 59
.9.3.5.3: Currency Uom ID (drop-down box) ..... 59
.9.3.5.4: Product Store Group ID (drop-down box) ..... 59
.9.3.5.5: From Date (popup calendar) ..... 59
.9.3.5.6: Thru Date (popup calendar) ..... 59

.9.3.5.7: Price ..... 59
.9.3.5.8: Term UOM ..... 59
.9.4: Content ..... 59
.9.4.1: EditProductContent ..... 59
.9.4.2: link buttons ..... 61
.9.4.3: Table of Current Content ..... 61
.9.4.3.1: Content ..... 61
.9.4.3.2: Type ..... 61
.9.4.3.3: From ..... 61
.9.4.3.4: Thru ..... 61
.9.4.3.5: Purchase From ..... 61
.9.4.3.6: Purchase Thru ..... 61
.9.4.3.7: Use Count ..... 61
.9.4.3.8: Use Time ..... 61
.9.4.3.9: Use Time UOM ..... 61
.9.4.3.10: Use Role ..... 61
.9.4.4: Create new Product Content ..... 61
.9.4.4.1: prepareAddContentToProduct ..... 61
.9.4.4.2: link buttons ..... 62
.9.4.4.3: Product Content Type ID (drop-down box) ..... 62
.9.4.4.4: Details vary ..... 62
.9.4.4.5: When editing ... ..... 63
.9.4.5: Add Content to Product ..... 63
.9.4.5.1: Content ID ..... 63
.9.4.5.2: Product Content Type ID (drop-down box) ..... 63
.9.4.5.3: From Date (popup calendar) ..... 63
.9.4.5.4: Thru Date (popup calendar) ..... 63
.9.4.5.5: Purchase From Date (popup calendar) ..... 63
.9.4.5.6: Purchase Thru Date (popup calendar) ..... 63
.9.4.5.7: Use Count Limit ..... 63
.9.4.5.8: Use Time ..... 63
.9.4.5.9: Use Time UOM (drop-down box) ..... 63
.9.4.5.10: Use Role ..... 63
.9.4.6: Override Simple Fields ..... 63
.9.4.6.1: Product Name ..... 63
.9.4.6.2: Product Description ..... 63
.9.4.6.3: Long Description ..... 63
.9.4.6.4: Detail Screen ..... 63
.9.4.6.5: Small Image ..... 64
.9.4.6.6: Medium Image ..... 64
.9.4.6.7: Large Image ..... 64
.9.4.6.8: Detail Image ..... 64

.9.4.7: Upload Image ..... 64
.9.5: IDs ..... 64
.9.5.1: EditProductGoodIdentifications ..... 64
.9.5.2: link buttons ..... 65
.9.5.3: Table of existing types and values ..... 65
.9.5.3.1: ID Type ..... 65
.9.5.3.2: ID Value ..... 65
.9.5.4: Tool to Add ID ..... 65
.9.5.4.1: ID Type (drop-down box) ..... 65
.9.5.4.2: ID Value ..... 65
.9.6: Categories ..... 66
.9.6.1: EditProductCategories ..... 66
.9.6.2: link buttons ..... 66
.9.6.3: Table of existing Category links ..... 66
.9.6.3.1: Category ID ..... 66
.9.6.3.2: From Date and Time ..... 67
.9.6.3.3: Thru Date and Time (popup calendar) ..... 67
.9.6.3.4: Sequence Num ..... 67
.9.6.3.5: Quantity ..... 67
.9.6.4: Tool to link other Product Categories ..... 67
.9.6.4.1: Product Category ID (drop-down box) ..... 67
.9.6.4.2: From Date (popup calendar) ..... 67
.9.6.4.3: Thru Date (popup calendar) ..... 67
.9.6.4.4: Sequence Num ..... 67
.9.6.4.5: Quantity ..... 67
.9.7: Keywords ..... 67
.9.7.1: Discussion about keywords ..... 67
.9.7.2: EditProductKeyword ..... 67
.9.7.3: link buttons ..... 68
.9.7.4: Add product keyword ..... 68
.9.7.4.1: Keyword ..... 68
.9.7.4.2: Weight ..... 69
.9.7.5: Table of existing Keywords ..... 69
.9.7.5.1: (Weight) ..... 69
.9.7.5.2: (Keyword) ..... 69
.9.8: Associations ..... 69
.9.8.1: EditProductAssoc-create ..... 69
.9.8.2: link buttons ..... 70
.9.8.3: Tool to Create Associations ..... 70
.9.8.3.1: Product ID ..... 70
.9.8.3.2: Product ID To (popup search tool) ..... 71
.9.8.3.3: Association Type ID (drop-down box) ..... 71

.9.8.3.4: From Date (popup calendar) ..... 71
.9.8.3.5: Thru Date (popup calendar) ..... 71
.9.8.3.6: Sequence Num ..... 71
.9.8.3.7: Reason ..... 71
.9.8.3.8: Instruction ..... 71
.9.8.3.9: Quantity ..... 71
.9.8.4: Table of Associations FROM ... ..... 71
.9.8.4.1: Table of Associations FROM ... ..... 71
.9.8.4.2: Product ID ..... 71
.9.8.4.3: Name ..... 71
.9.8.4.4: From Date and Time ..... 71
.9.8.4.5: Thru Date and Time ..... 71
.9.8.4.6: Seq Num ..... 71
.9.8.4.7: Quantity ..... 71
.9.8.4.8: Association Type ..... 72
.9.8.5: Table of Associations TO ... ..... 72
.9.8.5.1: Product ID ..... 72
.9.8.5.2: Name ..... 72
.9.8.5.3: From Date and Time ..... 72
.9.8.5.4: Thru Date and Time ..... 72
.9.8.5.5: Association Type ..... 72
.9.8.6: EditProductAssoc-edit ..... 72
.9.8.7: link buttons ..... 73
.9.9: Manufacturing ..... 73
.9.9.1: ViewProductManufacturing ..... 73
.9.9.2: link buttons ..... 74
.9.9.3: Table of Routings ..... 74
.9.9.3.1: Edit ..... 74
.9.9.3.2: Estimated Quantity ..... 74
.9.9.3.3: Estimated Cost ..... 74
.9.9.3.4: From Date ..... 75
.9.9.3.5: Thru Date ..... 75
.9.9.3.6: Work Effort Name ..... 75
.9.9.4: Low Level Code: Components ..... 75
.9.9.5: Low Level Code: Parent ..... 75
.9.10: Costs ..... 75
.9.10.1: EditProductCosts ..... 75
.9.10.2: link buttons ..... 76
.9.10.3: Table of Costs components ..... 76
.9.10.3.1: Cost Component ID ..... 76
.9.10.3.2: Cost Component Type ID ..... 77
.9.10.3.3: Product Feature ID ..... 77

.9.10.3.4: Party ID ..... 77
.9.10.3.5: Geo ID ..... 77
.9.10.3.6: From Date (and Time) ..... 77
.9.10.3.7: Thru Date (and Time) ..... 77
.9.10.3.8: Cost ..... 77
.9.10.3.9: CommonCurrencyUomId (drop-down box) ..... 77
.9.10.4: ProductEditCostComponent ..... 77
.9.10.4.1: Cost Component Type Id (drop-down box) ..... 77
.9.10.4.2: Product Feature ID ..... 77
.9.10.4.3: Party Id ..... 77
.9.10.4.4: Geo Id ..... 77
.9.10.4.5: From Date (popup calendar) ..... 77
.9.10.4.6: Thru Date (popup calendar) ..... 77
.9.10.4.7: Cost ..... 78
.9.10.4.8: CommonCurrencyUomId (drop-down box) ..... 78
.9.10.4.9: Cost Component Id (edit mode only) ..... 78
.9.10.5: ProductAutoCreateCosts ..... 78
.9.10.5.1: Discussion ..... 78
.9.10.5.2: Currency Uom Id (drop-down box) ..... 78
.9.10.5.3: Cost Component Type Prefix (drop-down box) ..... 78
.9.11: Attributes ..... 78
.9.11.1: UpdateProductAttribute ..... 78
.9.11.2: link buttons ..... 79
.9.11.3: Table of attributes ..... 79
.9.11.3.1: Name ..... 79
.9.11.3.2: Value ..... 79
.9.11.3.3: Type ..... 79
.9.11.4: Tool to Add Product Attribute ..... 79
.9.11.4.1: (box for Name) ..... 79
.9.11.4.2: (box for Value) ..... 79
.9.11.4.3: (box for Type) ..... 80
.9.12: Features ..... 80
.9.12.1: EditProductFeatures ..... 80
.9.12.2: link buttons ..... 81
.9.12.3: Table of features ..... 81
.9.12.3.1: ID ..... 81
.9.12.3.2: Description ..... 81
.9.12.3.3: Type ..... 81
.9.12.3.4: Category ..... 81
.9.12.3.5: From Date ..... 81
.9.12.3.6: Thru Date (popup calendar) ..... 81
.9.12.3.7: Amount ..... 81

.9.12.3.8: Sequence ..... 81
.9.12.3.9: Application Type (drop-down box) ..... 81
.9.12.3.10: All ..... 81
.9.12.4: Add Product Feature from Category or Group ..... 81
.9.12.4.1: Category (drop-down box) ..... 81
.9.12.4.2: Feature Group (drop-down box) ..... 81
.9.12.4.3: Feature Application Type (drop-down box) ..... 81
.9.12.5: Add Product Feature with Type and ID Code ..... 82
.9.12.5.1: Feature Type (drop-down box) ..... 82
.9.12.5.2: ID Code ..... 82
.9.12.5.3: Feature Application Type (drop-down box) ..... 82
.9.12.5.4: From (popup calendar) ..... 82
.9.12.5.5: Thru (popup calendar) ..... 82
.9.12.5.6: Sequence ..... 82
.9.12.6: Add Product Feature with ID ..... 82
.9.12.6.1: ID (popup search tool) ..... 82
.9.12.6.2: Feature Application Type (drop-down box) ..... 82
.9.12.6.3: From (popup calendar) ..... 82
.9.12.6.4: Thru (popup calendar) ..... 82
.9.12.6.5: Sequence ..... 82
.9.13: Facilities ..... 82
.9.13.1: EditProductFacilities ..... 82
.9.13.2: link buttons ..... 83
.9.13.3: Table of facilities ..... 83
.9.13.3.1: Facility ..... 83
.9.13.3.2: Minimum Stock ..... 83
.9.13.3.3: Reorder Quantity ..... 83
.9.13.3.4: Days to Ship ..... 83
.9.13.4: Add Facility ..... 83
.9.13.4.1: Facility (drop-down box) ..... 83
.9.13.4.2: Minimum Stock ..... 84
.9.13.4.3: Reorder Quantity ..... 84
.9.13.4.4: Days to Ship ..... 84
.9.14: Locations ..... 84
.9.14.1: EditProductFacilityLocations ..... 84
.9.14.2: link buttons ..... 84
.9.14.3: Table of existing locations ..... 84
.9.14.3.1: Facility ..... 84
.9.14.3.2: Location ..... 85
.9.14.3.3: Minimum Stock ..... 85
.9.14.3.4: Move Quantity ..... 85
.9.14.4: Add Facility Location ..... 85

.9.14.4.1: Facility (drop-down box) ..... 85
.9.14.4.2: Location Sequence ID ..... 85
.9.14.4.3: Minimum Stock ..... 85
.9.14.4.4: Move Quantity ..... 85
.9.15: Inventory ..... 85
.9.15.1: EditProductInventoryItems ..... 85
.9.15.2: link buttons ..... 86
.9.15.3: Inventory Summary table ..... 86
.9.15.3.1: Facility ..... 86
.9.15.3.2: ATP ..... 86
.9.15.3.3: QOH ..... 86
.9.15.3.4: Incoming Shipments ..... 86
.9.15.3.5: Incoming Production Runs ..... 86
.9.15.3.6: Outgoing Production Runs ..... 87
.9.15.4: Inventory Items ..... 87
.9.15.4.1: Discussion ..... 87
.9.15.4.2: Item ID ..... 87
.9.15.4.3: Item Type ..... 87
.9.15.4.4: Status ..... 87
.9.15.4.5: Received ..... 87
.9.15.4.6: Expire ..... 87
.9.15.4.7: Facility or Container ID ..... 87
.9.15.4.8: Location ..... 87
.9.15.4.9: Lot ID ..... 87
.9.15.4.10: Bin Num ..... 87
.9.15.4.11: Price Per Unit ..... 87
.9.15.4.12: ATP/QOH or Serial# ..... 87
.9.15.4.13: EditInventoryItem ..... 87
.9.15.4.14: See the Facility Manager ..... 88
.9.15.5: Outstanding Purchase Orders ..... 88
.9.16: Suppliers ..... 89
.9.16.1: Discussion ..... 89
.9.16.2: EditProductSuppliers ..... 89
.9.16.3: link buttons ..... 91
.9.16.4: Table of existing Suppliers ..... 91
.9.16.4.1: Table sort order ..... 91
.9.16.4.2: Supplier ..... 91
.9.16.4.3: Supplier Product ID ..... 91
.9.16.4.4: Minimum Order Quantity ..... 91
.9.16.4.5: Available from date ..... 91
.9.16.4.6: Available thru date ..... 91
.9.16.4.7: Quantity UOM ID ..... 91

.9.16.4.8: Comm. Perc. ..... 91
.9.16.4.9: Last Price ..... 91
.9.16.5: Tool to add new Supplier ..... 91
.9.16.5.1: Supplier (drop-down box) ..... 91
.9.16.5.2: Available from date (popup calendar) ..... 91
.9.16.5.3: Minimum Order Quantity ..... 91
.9.16.5.4: Currency Uom ID (drop-down box) ..... 91
.9.16.5.5: Available Thru Date (popup calendar) ..... 92
.9.16.5.6: Supplier Pref Order ID ..... 92
.9.16.5.7: Supplier Rating Type ID ..... 92
.9.16.5.8: Standard Lead Time Days ..... 92
.9.16.5.9: Order Quantity Increments ..... 92
.9.16.5.10: Units Included ..... 92
.9.16.5.11: Quantity Uom ID (drop-down box) ..... 92
.9.16.5.12: Last Price ..... 92
.9.16.5.13: Supplier Product Name ..... 92
.9.16.5.14: Supplier Product ID ..... 92
.9.16.5.15: Supplier Commission Perc ..... 92
.9.16.5.16: Comments ..... 92
.9.17: Accounts ..... 92
.9.17.1: EditProductGlAccounts ..... 92
.9.17.2: link buttons ..... 93
.9.17.3: Table of assigned GL Accounts ..... 93
.9.17.3.1: Account Type ..... 93
.9.17.3.2: GL Account (drop-down box) ..... 93
.9.17.4: Add a General Ledger Account ..... 93
.9.17.4.1: Account Type (drop-down box) ..... 94
.9.17.4.2: GL Account (drop-down box) ..... 94
.9.18: Payment Types ..... 94
.9.18.1: EditProductPaymentMethodTypes ..... 94
.9.18.2: link buttons ..... 94
.9.18.3: Table of Payment Method Types ..... 95
.9.18.3.1: Payment Method Type ..... 95
.9.18.3.2: Purpose ..... 95
.9.18.3.3: From Date and Time ..... 95
.9.18.3.4: Thru Date (popup calendar) ..... 95
.9.18.3.5: Sequence Num ..... 95
.9.18.4: Tool to add Payment Method Types ..... 95
.9.18.4.1: Payment Method Type (drop-down box) ..... 95
.9.18.4.2: Purpose (drop-down box) ..... 95
.9.18.4.3: From Date (popup calendar) ..... 95
.9.18.4.4: Thru Date (popup calendar) ..... 95

.9.18.4.5: Sequence Num ..... 95
.9.19: Quick Admin ..... 95
.9.19.1: Discussion ..... 95
.9.19.2: EditProductQuickAdmin ..... 95
.9.19.3: link buttons ..... 97
.9.19.4: Product Name ..... 97
.9.19.5: Selectable Features ..... 97
.9.19.6: Shipping Dimensions and Weights ..... 97
.9.19.7: Standard Features ..... 97
.9.19.8: Feature Types ..... 97
.9.19.9: Categories ..... 97
.9.19.10: View/remove product page (popup calendar) ..... 97
.9.20: Variants ..... 97
.9.20.1: Quick Create Virtual from Variants ..... 97
.9.20.2: QuickAddVariants ..... 97
.9.20.3: link buttons ..... 98
.9.20.4: Discussion ..... 98
.9.21: Configurations ..... 98
.9.21.1: EditProductConfigs ..... 98
.9.21.2: link buttons ..... 99
.9.21.3: Product Config ..... 100
.9.21.4: CommonSeqNum ..... 100
.9.21.5: From Date and Time ..... 100
.9.21.6: Configuration working section ..... 100
.9.21.6.1: Description ..... 100
.9.21.6.2: Long Description ..... 100
.9.21.6.3: Product Config Type ID (drop-down box) ..... 100
.9.21.6.4: Thru Date (popup calendar) ..... 100
.9.21.6.5: Is Mandatory (Y/N) ..... 100
.9.21.7: Tool to add configuration ..... 100
.9.21.7.1: Product Config Item ID (drop-down box) ..... 100
.9.21.7.2: Sequence Num ..... 100
.9.21.7.3: From Date (popup calendar) ..... 100
.9.21.7.4: Description ..... 100
.9.21.7.5: Long Description ..... 100
.9.21.7.6: Product Config Type ID (drop-down box) ..... 100
.9.21.7.7: Thru Date (popup calendar) ..... 101
.9.21.7.8: Is Mandatory (Y/N) ..... 101
.10: Tab - Catalog Features ..... 102
.10.1: Discussion of Features ..... 102
.10.2: Feature Types ..... 102
.10.2.1: Table of existing Feature Types ..... 102

.10.2.1.1: EditFeatureTypes ..... 102
.10.2.1.2: link buttons ..... 103
.10.2.1.3: Description ..... 103
.10.2.1.4: Edit column ..... 103
.10.2.1.5: Delete column ..... 103
.10.2.2: NewFeatureType or Edit links ..... 104
.10.2.2.1: EditFeatureType-new ..... 104
.10.2.2.2: link buttons ..... 104
.10.2.2.3: Product Feature Type ID ..... 104
.10.2.2.4: Parent Type ID (drop-down box) ..... 104
.10.2.2.5: Has Table (Y/N) ..... 104
.10.2.2.6: Description ..... 104
.10.3: Feature Categories ..... 104
.10.3.1: EditFeatureCategories ..... 104
.10.3.2: link buttons ..... 105
.10.3.3: Create a Product Feature Category ..... 105
.10.3.3.1: Description ..... 105
.10.3.3.2: Parent Category (drop-down box) ..... 105
.10.3.4: Edit Feature with ID: ..... 105
.10.3.4.1: Edit or Create - Discussion ..... 105
.10.3.4.2: Jump link ..... 106
.10.3.4.3: Table of Product Feature Categories ..... 106
.10.3.4.4: EditFeatureCategoryFeatures ..... 106
.10.3.4.5: link buttons ..... 106
.10.3.4.6: Edit Features for Feature Category ... ..... 106
.10.3.4.7: Table of Product Feature Categories ..... 107
.10.3.4.8: Edit Feature screen ..... 107
.10.4: Feature Groups ..... 109
.10.4.1: EditFeatureGroups ..... 109
.10.4.2: link buttons ..... 110
.10.4.3: Table of Groups ..... 110
.10.4.3.1: ID ..... 110
.10.4.3.2: Description ..... 110
.10.4.4: Create a Product Feature Group ..... 110
.10.4.4.1: Description ..... 110
.10.4.5: Edit Product Feature Group ..... 110
.10.4.5.1: EditFeatureGroupAppls ..... 110
.10.4.5.2: link buttons ..... 111
.10.4.5.3: Table of Feature Group Application IDs ..... 111
.10.4.5.4: Quick Apply Product Feature ..... 111
.10.4.5.5: Apply Product Feature(s) From Category ..... 111
.11: Tab - Catalog Promos ..... 113

.11.1: FindProductPromo ..... 113
.11.2: link buttons ..... 113
.11.3: Table of current promotions ..... 113
.11.3.1: Promo Name (ID) ..... 114
.11.3.2: Promo Text ..... 114
.11.3.3: Req. Code? ..... 114
.11.3.4: Created ..... 114
.11.4: Edit Promotion Code ..... 114
.11.4.1: PromotionCode-Edit ..... 114
.11.5: Editing tabs ..... 115
.11.5.1: Edit Promotion ..... 115
.11.5.1.1: EditProductPromo ..... 115
.11.5.1.2: link buttons ..... 116
.11.5.1.3: Product Promo ID ..... 116
.11.5.1.4: Promo Name ..... 116
.11.5.1.5: Promo Text ..... 116
.11.5.1.6: User Entered (Y/N) ..... 116
.11.5.1.7: Show to Customer (Y/N) ..... 116
.11.5.1.8: Require Code (Y/N) ..... 117
.11.5.1.9: Use Limit Per Order ..... 117
.11.5.1.10: Use Limit Per Customer ..... 117
.11.5.1.11: Use Limit Per Promotion ..... 117
.11.5.1.12: Billback Factor ..... 117
.11.5.1.13: Last Modified By: ..... 117
.11.5.1.14: Created By ..... 117
.11.5.2: Edit Rules ..... 117
.11.5.2.1: Rules discussion ..... 117
.11.5.2.2: EditProductPromoRules ..... 117
.11.5.2.3: link buttons ..... 118
.11.5.2.4: Rule ID ..... 119
.11.5.2.5: Rule Name ..... 119
.11.5.2.6: Conditions ..... 119
.11.5.2.7: Actions ..... 119
.11.5.2.8: Add New Promo Rule ..... 119
.11.5.2.9: Promotion Categories ..... 119
.11.5.2.10: Promotion Products ..... 120
.11.5.3: Stores (for promotion) ..... 120
.11.5.3.1: EditProductPromoStores ..... 120
.11.5.3.2: link buttons ..... 120
.11.5.3.3: Table of stores ..... 121
.11.5.3.4: Add Store Promo ..... 121
.11.5.4: Codes ..... 121

.11.5.4.1: FindProductPromoCode ..... 121
.11.5.4.2: link buttons ..... 121
.11.5.4.3: Table of existing Promotion Codes ..... 122
.11.5.4.4: Add Set of Promotion Codes ..... 122
.11.5.4.5: Edit Promotion Code ..... 122
.11.6: Create New Product Promo ..... 124
.11.6.1: EditProductPromo-New ..... 124
.11.6.2: link buttons ..... 125
.11.6.3: Promo Name ..... 125
.11.6.4: Promo Text ..... 125
.11.6.5: User Entered (Y/N) ..... 125
.11.6.6: Show To Customer (Y/N) ..... 125
.11.6.7: Require Code (Y/N) ..... 125
.11.6.8: Use Limit Per Order ..... 126
.11.6.9: Use Limit Per Customer ..... 126
.11.6.10: Use Limit Per Promotion ..... 126
.11.6.11: Billback Factor ..... 126
.12: Tab - Catalog PriceRules ..... 127
.12.1: FindProductPriceRules ..... 127
.12.2: link buttons ..... 127
.12.3: General discussion ..... 127
.12.3.1: Processes ..... 127
.12.3.1.1: Cookie ..... 127
.12.3.1.2: Conditions ..... 127
.12.3.1.3: Flat Amount Modify ..... 127
.12.3.1.4: Comparing 'Override' and 'Modify' ..... 128
.12.4: Table of existing Price Rules ..... 128
.12.4.1: Price Rule Name and ID ..... 128
.12.4.2: Sale Rule? ..... 128
.12.4.3: From Date ..... 128
.12.4.4: Thru Date ..... 128
.12.5: Add a Price Rule ..... 128
.12.6: Edit Global Price Rule ..... 128
.12.6.1: EditProductPriceRules ..... 128
.12.6.2: link buttons ..... 129
.12.6.3: Rule ID ..... 129
.12.6.4: Rule Name ..... 129
.12.6.5: From Date (popup calendar) ..... 129
.12.6.6: Thru Date (popup calendar) ..... 129
.12.6.7: Sale Price (Y/N) ..... 129
.12.6.8: Conditions ..... 129
.12.6.8.1: Seq. ID ..... 129

.12.6.8.2: Input (drop-down box) ..... 130
.12.6.8.3: Operator (drop-down box) ..... 130
.12.6.8.4: Value ..... 130
.12.6.8.5: New Condition sequence rule ..... 130
.12.6.9: Actions ..... 130
.12.6.9.1: Seq ID ..... 130
.12.6.9.2: Action Type (drop-down box) ..... 130
.12.6.9.3: Amount ..... 130
.12.6.9.4: New Action sequence rule ..... 130
.12.6.9.5: Actions Discussion ..... 130
.13: Tab - Catalog Stores ..... 132
.13.1: FindProductStore ..... 132
.13.2: link buttons ..... 132
.13.3: Product Store table ..... 132
.13.3.1: Store Name ..... 132
.13.3.2: Title ..... 132
.13.3.3: Sub-Title ..... 132
.13.4: Store ..... 132
.13.4.1: Discussion ..... 132
.13.4.2: EditProductStore ..... 133
.13.4.3: link buttons ..... 135
.13.4.4: Store for: ... (ID...) ..... 135
.13.4.5: Primary Store Group ID ..... 135
.13.4.6: Store Name ..... 135
.13.4.7: Company Name ..... 135
.13.4.8: Title ..... 135
.13.4.9: Subtitle ..... 135
.13.4.10: Pay To Party ID ..... 135
.13.4.11: Days to Cancel Non Pay ..... 135
.13.4.12: Manual Auth Is Capture (Y/N) ..... 135
.13.4.13: Prorate Shipping (Y/N) ..... 135
.13.4.14: View Cart on Add (Y/N) ..... 135
.13.4.15: Auto Save Cart (Y/N) ..... 135
.13.4.16: Auto Approve Reviews (Y/N) ..... 135
.13.4.17: Is Demo Store (Y/N) ..... 135
.13.4.18: Is Immediately Fulfilled (Y/N) ..... 136
.13.4.19: Inventory Facility ID (drop-down box) ..... 136
.13.4.20: One Inventory Facility (Y/N) ..... 136
.13.4.21: Check Inventory (Y/N) ..... 136
.13.4.22: Reserve Inventory (Y/N) ..... 136
.13.4.23: Reserve Order Enum ID (drop-down box) ..... 136
.13.4.24: Require Inventory (Y/N) ..... 136

.13.4.25: Requirement Method Enum ID (drop-down box) ..... 136
.13.4.26: Order Number Prefix ..... 136
.13.4.27: Default Locale String ..... 136
.13.4.28: Default Currency Uom ID ..... 136
.13.4.29: Default Sales Channel Enum ID ..... 136
.13.4.30: Allow Password (Y/N) ..... 136
.13.4.31: Default Password ..... 137
.13.4.32: Explode Order Items (Y/N) ..... 137
.13.4.33: Check Gc Balance (Y/N) ..... 137
.13.4.34: Retry Failed Auths (Y/N) ..... 137
.13.4.35: Header Approved Status ..... 137
.13.4.36: Item Approved Status ..... 137
.13.4.37: Digital Item Approved Status ..... 137
.13.4.38: Header Declined Status ..... 137
.13.4.39: Item Declined Status ..... 137
.13.4.40: Header Cancel Status ..... 137
.13.4.41: Item Cancel Status ..... 137
.13.4.42: Auth Declined Message ..... 137
.13.4.43: Auth Fraud Message ..... 137
.13.4.44: Auth Error Message ..... 137
.13.4.45: Style Sheet ..... 137
.13.4.46: Header Logo ..... 137
.13.4.47: Header Middle Background ..... 138
.13.4.48: Header Right Background ..... 138
.13.4.49: Use Primary Email Username (Y/N) ..... 138
.13.4.50: Require Customer Role (Y/N) ..... 138
.13.4.51: Auto Invoice Digital Items (Y/N) ..... 138
.13.4.52: Show Checkout Gift Options (Y/N) ..... 138
.13.4.53: Select Payment Type Per Item (Y/N) ..... 138
.13.4.54: Show Prices With Vat Tax (Y/N) ..... 138
.13.4.55: Show Tax Is Exempt (Y/N) ..... 138
.13.4.56: Vat Tax Auth Geo ID (popup search tool) ..... 138
.13.4.57: Vat Tax Auth Party ID (popup search tool) ..... 138
.13.4.58: Enable Digital Product Upload (Y/N) ..... 138
.13.4.59: Dig Prod Upload Category Id (popup search tool) ..... 138
.13.4.60: 'Edit Facility WebStore Warehouse' link ..... 138
.13.5: Roles ..... 139
.13.5.1: EditProductStoreRoles ..... 139
.13.5.2: link buttons ..... 139
.13.5.3: Table of Roles ..... 139
.13.5.3.1: Party ..... 139
.13.5.3.2: Role ..... 139

.13.5.3.3: From Date ..... 140
.13.5.3.4: Thru Date ..... 140
.13.5.4: Create Product Store Role ..... 140
.13.5.4.1: Role Type (drop-down box) ..... 140
.13.5.4.2: Party ..... 140
.13.5.4.3: From Date (popup calendar) ..... 140
.13.6: Promos ..... 140
.13.6.1: Discussion ..... 140
.13.6.2: EditProductStorePromos ..... 140
.13.6.3: link buttons ..... 142
.13.6.4: Table of Promotions ..... 142
.13.6.4.1: Discussion ..... 142
.13.6.4.2: Promo Name (ID) ..... 142
.13.6.4.3: From Date ..... 142
.13.6.4.4: Thru Date / Time (popup calendar) ..... 142
.13.6.4.5: Sequence ..... 142
.13.6.5: Tool to Add Store Promo ..... 142
.13.6.5.1: Select promo (drop-down box) ..... 142
.13.6.5.2: From date and time ..... 142
.13.7: Catalogs ..... 142
.13.7.1: EditProductStoreCatalogs ..... 142
.13.7.2: link buttons ..... 143
.13.7.3: Table of applicable catalogs ..... 143
.13.7.3.1: Catalog ..... 143
.13.7.3.2: From Date and Time ..... 143
.13.7.3.3: Thru Date and Time (popup calendar) ..... 143
.13.7.3.4: Sequence Num ..... 143
.13.7.4: Tool to add catalog ..... 143
.13.7.4.1: Catalog (drop-down box) ..... 143
.13.7.4.2: From Date (popup calendar) ..... 144
.13.7.4.3: Thru Date (popup calendar) ..... 144
.13.7.4.4: Sequence Num ..... 144
.13.8: Web Sites ..... 144
.13.8.1: EditProductStoreWebSites ..... 144
.13.8.2: link buttons ..... 144
.13.8.3: Table of Websites ..... 144
.13.8.3.1: WebSite ..... 144
.13.8.3.2: Host ..... 144
.13.8.3.3: Port ..... 145
.13.8.4: Set store on WebSite ..... 145
.13.9: Shipping ..... 145
.13.9.1: EditProductStoreShipSetup ..... 145

.13.9.2: link buttons ..... 145
.13.9.3: Estimate ID ..... 145
.13.9.4: Method ..... 145
.13.9.5: To ..... 145
.13.9.6: Party ..... 146
.13.9.7: Role ..... 146
.13.9.8: Base Prc ..... 146
.13.9.9: Base Price ..... 146
.13.9.10: Item Price ..... 146
.13.9.11: Product Store Shipment Settings ..... 146
.13.9.11.1: Discussion ..... 146
.13.9.11.2: EditProductStoreShipSetup-View ..... 146
.13.9.11.3: link buttons ..... 148
.13.9.11.4: Details of the Settings ..... 148
.13.9.12: New Product Store Shipment Method Settings ..... 148
.13.9.12.1: EditProductStoreShipSetup-Method ..... 148
.13.9.12.2: link buttons ..... 150
.13.9.12.3: Table of Store Shipment Method Associations ..... 150
.13.9.12.4: Carrier Shipment Method criteria ..... 151
.13.9.12.5: Shipment Method Type ..... 153
.13.9.12.6: Carrier Shipment Method ..... 153
.13.9.13: New Product Store Shipment Estimates ..... 153
.13.9.13.1: EditProductStoreShipSetup-Estimate ..... 154
.13.9.13.2: link buttons ..... 156
.13.9.13.3: Shipment Method (drop-down box) ..... 156
.13.9.13.4: From Geo (drop-down box) ..... 156
.13.9.13.5: To Geo (drop-down box) ..... 156
.13.9.13.6: Party ..... 156
.13.9.13.7: Role ..... 156
.13.9.13.8: Flat Base Percent ..... 156
.13.9.13.9: Flat Base Price ..... 156
.13.9.13.10: Flat Item Price ..... 156
.13.9.13.11: Feature Group ..... 156
.13.9.13.12: Oversize Unit ..... 156
.13.9.13.13: Oversize Surcharge ..... 157
.13.9.13.14: Weight ..... 157
.13.9.13.15: Quantity ..... 157
.13.9.13.16: Price ..... 157
.13.10: Payments ..... 157
.13.10.1: EditProductStore PaySetup ..... 157
.13.10.2: link buttons ..... 158
.13.10.3: Table with existing payment settings ..... 158

.13.10.3.1: Payment Method Type ..... 158
.13.10.3.2: Service Type ..... 158
.13.10.3.3: Service Name ..... 159
.13.10.3.4: Payment Props ..... 159
.13.10.3.5: All Prods? ..... 159
.13.10.4: Tool to edit or start methods ..... 159
.13.10.4.1: Payment Method Type (drop-down box) ..... 159
.13.10.4.2: Service Type (drop-down box) ..... 159
.13.10.4.3: Service Name ..... 159
.13.10.4.4: Payment Properties ..... 159
.13.10.4.5: Apply to All Products? (Y/N) ..... 159
.13.11: Emails ..... 159
.13.11.1: EditProductStoreEmails ..... 159
.13.11.2: link buttons ..... 161
.13.11.3: Table of existing email settings ..... 161
.13.11.3.1: Email Type ..... 161
.13.11.3.2: Body Screen Location ..... 161
.13.11.3.3: Attachment Screen Location (XSL-FO) ..... 161
.13.11.3.4: From Address ..... 161
.13.11.3.5: CC Address ..... 161
.13.11.3.6: BCC Address ..... 161
.13.11.3.7: Subject ..... 161
.13.11.3.8: Content Type ..... 161
.13.11.4: Tool to add other Emails ..... 161
.13.11.4.1: Email Type (drop-down box) ..... 161
.13.11.4.2: Body Screen Location ..... 161
.13.11.4.3: Attachment Screen Location (XSL-FO) ..... 161
.13.11.4.4: From Address ..... 161
.13.11.4.5: Cc Address ..... 162
.13.11.4.6: Bcc Address ..... 162
.13.11.4.7: Subject ..... 162
.13.11.4.8: Content Type ..... 162
.13.12: Surveys ..... 162
.13.12.1: EditProductStoreSurveys ..... 162
.13.12.2: link buttons ..... 163
.13.12.3: Table of existing surveys ..... 163
.13.12.3.1: Type ..... 163
.13.12.3.2: Name ..... 164
.13.12.3.3: Survey ..... 164
.13.12.3.4: Product ..... 164
.13.12.3.5: Category ..... 164
.13.12.3.6: From Date ..... 164

.13.12.3.7: Sequence # ..... 164
.13.12.4: Tool to Create Store Survey ..... 164
.13.12.4.1: Type (drop-down box) ..... 164
.13.12.4.2: Group Name ..... 164
.13.12.4.3: Survey (drop-down box) ..... 164
.13.12.4.4: Product ID ..... 164
.13.12.4.5: Category ID (drop-down box) ..... 164
.13.12.4.6: From Date (popup calendar) ..... 164
.13.12.4.7: Thru Date (popup calendar) ..... 164
.13.12.4.8: Survey Template Path ..... 164
.13.12.4.9: Result Template Path ..... 164
.13.12.4.10: Sequence ..... 164
.13.13: Override ..... 165
.13.13.1: editProductStoreKeywordOvrd ..... 165
.13.13.2: link buttons ..... 165
.13.13.3: Table of existing overrides ..... 165
.13.13.3.1: Keyword ..... 165
.13.13.3.2: From Date ..... 165
.13.13.3.3: Thru Date (popup calendar) ..... 166
.13.13.3.4: Target ..... 166
.13.13.3.5: Target Type (drop-down box) ..... 166
.13.13.4: Tool to create new override settings ..... 166
.13.13.4.1: Keyword ..... 166
.13.13.4.2: From Date (popup calendar) ..... 166
.13.13.4.3: Thru Date (popup calendar) ..... 166
.13.13.4.4: Target ..... 166
.13.13.4.5: Target Type Enum ID (drop-down box) ..... 166
.13.14: Segments ..... 166
.13.14.1: ViewProductStoreSegments ..... 166
.13.14.2: link buttons ..... 167
.13.14.3: Discussion ..... 167
.13.15: Create New Product Store ..... 167
.14: Tab - Catalog Thesaurus ..... 168
.14.1: editKeywordThesaurus ..... 168
.14.2: link buttons ..... 168
.14.3: Add to Alternate KeyWord Thesaurus ..... 168
.14.3.1: Keyword ..... 168
.14.3.2: Alternate ..... 168
.14.3.3: Relationship (drop-down box) ..... 168
.14.4: Alphabet letter shortcut ..... 168
.14.5: Table to edit existing keywords ..... 169
.15: Tab - Catalog Reviews ..... 170

.15.1: pendingReviews ..... 170
.15.2: link buttons ..... 172
.15.3: Posted Date ..... 172
.15.4: Posted By ..... 172
.15.5: Rating ..... 172
.15.6: Is Anonymous (Y/N) ..... 172
.15.7: Status (drop-down box) ..... 172
.15.8: Review ..... 172
.16: Tab - Configurations ..... 173
.16.1: FindProductConfigItems ..... 173
.16.2: link buttons ..... 173
.16.3: Table of Existing Configurations ..... 173
.16.3.1: Config Item ..... 173
.16.3.2: Type ..... 173
.16.3.3: Description ..... 173
.16.4: Edit an Existing Configuration ..... 173
.16.4.1: EditProductConfigItem ..... 174
.16.4.2: link buttons ..... 174
.16.4.3: Config Item ID ..... 174
.16.4.4: ProductConfigItemType (drop-down box) ..... 174
.16.4.5: Config Item Name ..... 174
.16.4.6: Description ..... 174
.16.4.7: Options Tab ..... 174
.16.4.7.1: EditProductConfigOptions ..... 174
.16.4.7.2: link buttons ..... 175
.16.4.7.3: Table of Existing Options ..... 175
.16.4.7.4: Create New Config Option tool ..... 175
.16.4.7.5: Edit Existing Config Option ..... 176
.16.4.8: Update Content of Existing Configuration ..... 177
.16.4.8.1: EditProductConfigItemContent ..... 177
.16.4.8.2: link buttons ..... 178
.16.4.8.3: Table of Existing Content ..... 178
.16.4.8.4: Create New Product Config Item Content ..... 179
.16.4.8.5: Add Content to Product Config Item ..... 179
.16.4.8.6: Override Simple Fields ..... 180
.16.4.8.7: Upload Image ..... 180
.16.5: Create a new Product Config ..... 180
.16.5.1: EditProductConfigItem-new ..... 180
.16.5.2: link buttons ..... 180
.16.5.3: Product Config Item Type (drop-down box) ..... 180
.16.5.4: Config Item Name ..... 180
.16.5.5: Description ..... 181

.16.6: Testing New Configurations ..... 181
.16.6.1: At the ECommerce Site ..... 181
.16.6.1.1: View Product Page ..... 181
.16.6.1.2: Compare Content with Configuration ..... 181
.16.6.1.3: Check the Prices ..... 181
.16.6.2: Warehouse and Manufacturing Operations ..... 181
.16.6.2.1: Check the Order Detail Page ..... 181
.16.6.2.2: Check for Manufacturing Tab ..... 181

# .1 Introduction

## .1.1 main

id:[11602] image:

This is the screen greeting you when you start Open For Business or later click on the Catalog Manager - Main tab.

## .1.2 Discussion of the Main screen

The Catalog Manager creates or provides access to a variety of information. Whether Products, Catalogs, or Categories, this screen offers search tools and links to get you to the type of information you need or are working with quickly and accurately.<P> Down the left hand column are 4 sections: <B>Search Products, Browse Catalogs, Browse Categories,</B> and <B>Product Categories</B>. You can click on the colored '_' to close a section; later, click on the colored '[]' to reopen the section. Each of those sections are discussed below before we begin to explore the Catalog Administration Main Page.

## .1.3 Navigation Panel

The Left-hand Navigation Panel is visible even when working under the other tabs. The content displayed will vary according to what choices you have made. This document is arranged to walk you through the Navigation Panel search

tools (Search Products, Browse Catalogs, Browse Categories, and Category Products) and links first. As you come to the desired Edit or Creation window, jump in this document to the associated 'Edit' discussion.

## .1.4 Some symbols used as shortcuts

### .1.4.1 Brackets [ ]

Application links as found on the screens are represented in this document with brackets around them like [this]. When you see a bracketed item, you can know we are referring to a link or key or 'button' which will initiate the indicated action.

### .1.4.2 Greater-than symbols >>

The single (>) or double (>>) greater than symbols can be read as 'takes you to' or 'leads to' or 'results in.' These are sometimes used in this document to indicate that from this screen, if you click on the [Bracketed Link], you will be taken to Next Process. Within the pop-up calendars, however, the (>>) jumps you ahead one year and the (<<) jumps you back a year.

### .1.4.3 The Asterisk *

An asterisk * marks those items which must be completed on a screen before the desired action can occur.

# .2 Search Products

## .2.1 SearchProducts

id:[DOCCAT756] image:

## .2.2 link buttons

[Find] [Advanced Search]

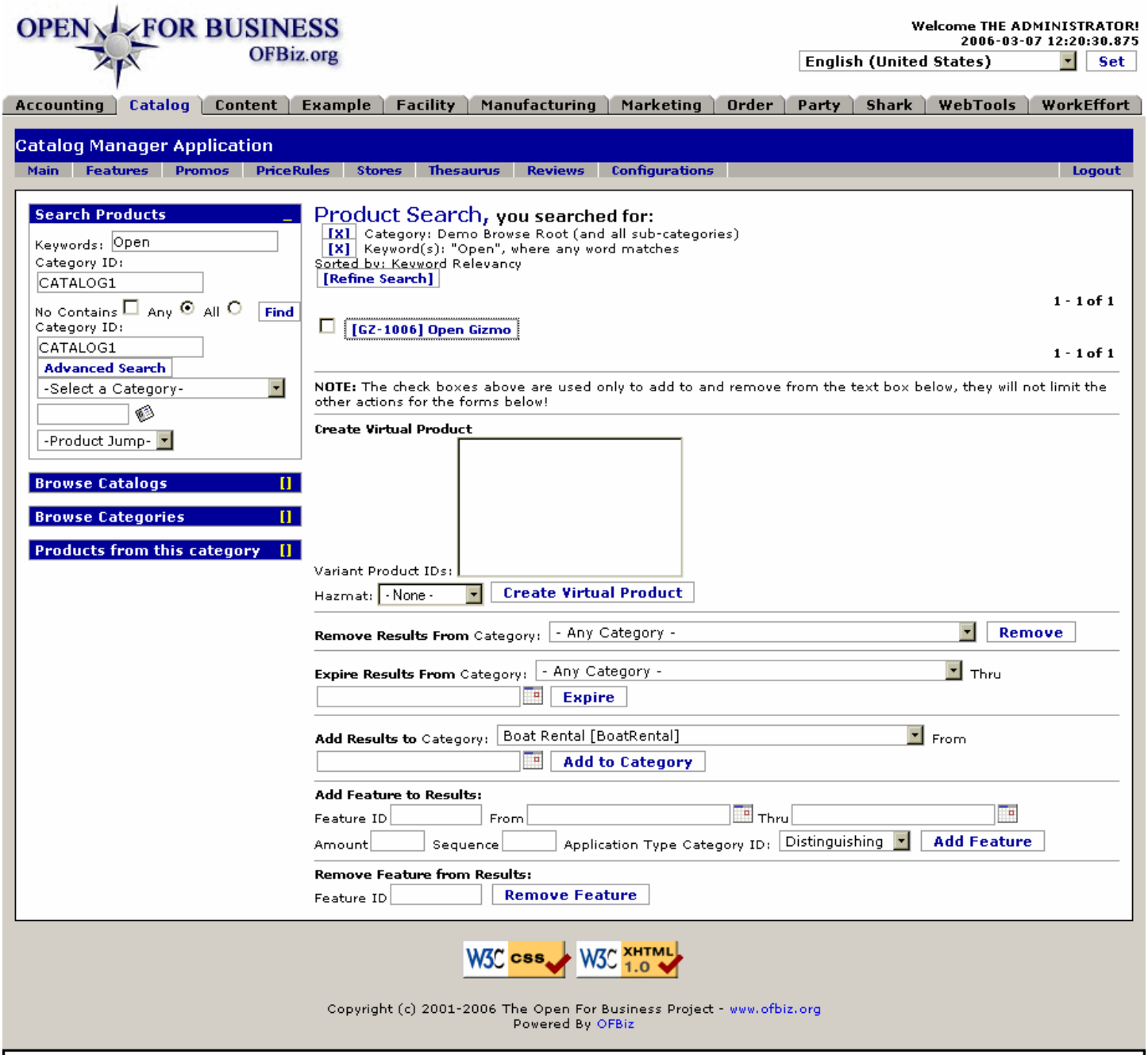
## .2.3 by Keywords

### .2.3.1 Discussion

Enter any or all of the words in a product name, or enter a Category ID. <br> 'Any' will present every product or category with any of the specified words. <br> 'All' returns only the products with every word in its name. <br> 'No Contains' checked means to eliminate returns meeting the criteria from the first Category ID box. For example, in the illustration below, if the Category 'Gizmo' were entered in the first box and 'No Contains' were checked, there would be no results found. <P> Click on [Find] when entries are complete. If your returns are not satisfactory, use the Advanced Search feature.

### .2.3.2 Results of search

#### .2.3.2.1 keywordsearch-results




Results of the keyword search for "Open" within Catalog1 are displayed in the window with many tools ready for you to proceed.

### .2.3.2.2 link buttons

[Find] [Advanced Search] [Refine Search] [Create Virtual Product] [Remove] [Expire] [Add to Category] [Add Feature] [Remove Feature]

### .2.3.2.3 List of found products

Each of the returned Items is a link to that item's catalog page. Click on the desired product to go to that page. <P>

### .2.3.2.4 Create Virtual Product

An example of virtual product is 'Shirt' -- no one buys a shirt, they buy a white, short-sleeve shirt, with button-down collar and pocket, size Large. Each of the adjectives represents a variant of the virtual product shirt. <p> What this tool does is provide the means to make variants around an existing product which would turn that product into a

virtual. In the example found, Open Gizmo is the Virtual and the Variants are expressed in (MIT), (BSD), etc.

#### .2.3.2.5 Remove Results from Category

Here you can quickly delete all of the resulting products from every category (specify -Any Category-) or from whichever category you select from the drop-down box.

#### .2.3.2.6 Expire Results from Category

This tool is useful for having items in a seasonal category; when the season is finished, the results would be 'Expired' from the category. Assign a date from the popup calendar before clicking on [Expire].

#### .2.3.2.7 Add results to category

Here you can quickly drop your search results (and the search could have been for just one product, by the way!) into any category you select. <br> If you wish the categorization to start at a future date, use the popup calendar to select that date.

#### .2.3.2.8 Add Feature to Results

Quickly attach a feature from the drop-down box to all of the results of the search.

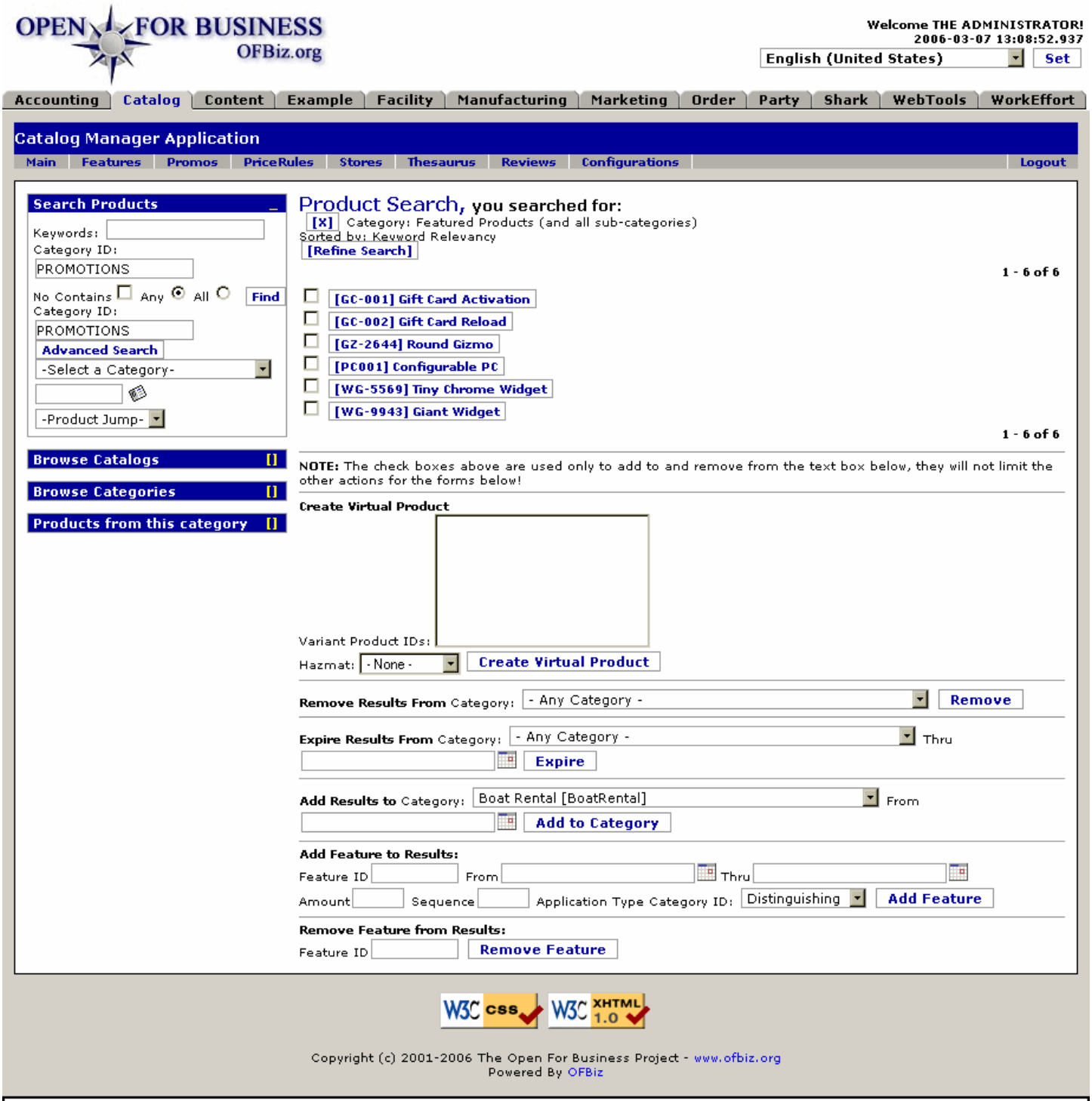
#### .2.3.2.9 Remove Feature from Results

If a feature is no longer offered with the products displayed, use this tool to identify the Feature ID and then remove the association.

## .2.4 by Category ID

Enter any or all of the words in a category name; 'Any' will present every category with any of the specified words, 'All' returns only the categories with every word in its name.

### .2.4.1 categorysearch-results




A Category search will give results based upon products assigned to the Category.

## .2.4.2 Discussion

Whether by keyword or category, the radio buttons for Any and All apply. <p> Enter the category into the upper Category ID box, or use the drop-down box and select the Category from there. Results return all products found within that category. <p> The link buttons and the tools given to work with the results are the same as discussed above under the Keywords search.

# .2.5 Advanced Search

Begin an Advanced Search by entering either a Category ID in the input box under the 'Any' and 'All' buttons, or selecting a category in the drop-down input box (or do both!!), then clicking on [Advanced Search].

### .2.5.1 Category ID

Enter an existing Category ID in this field, then click the [Advanced Search] link. <P> You may leave this field blank and, if you do not select a category from the drop-down box, the screen returned will be as shown in the graphic below. When a category is indicated, only the search parameters that apply to the category are presented.

### .2.5.2 Select a Category (drop-down box)

Alternately, choose a Category from the drop-down box, then click on the [Advanced Search] link.

### .2.5.3 advancedsearch

id:[11615] image:

[Advanced Search] brings up this tool with drop-down boxes for various parameters for your chosen Category, if any.

### .2.5.4 link buttons

[Advanced Search] [Find]

### .2.5.5 Advanced Search tools

#### .2.5.5.1 Category (drop-down box)

If you had already indicated a category before clicking [Advanced Search], that will be stated here and its choice will determine which of the subsequent drop-down boxes are displayed. If no Category has been chosen yet, you have the drop-down box here from which to choose.<p> Include Sub-Categories: Yes or No by selecting a radio button. Default is Yes; select No if you do not want sub-categories searched.

### .2.5.5.2 Keywords

Enter one or more keywords for the search. Then choose either the Any or All radio button. This will indicate whether the results should be determined by finding <B>Any</B> one or more of the words, or only the results which include <B>All</B> of the words.

### .2.5.5.3 Feature IDs (3 choices)

Entry must be using established IDs already in the database; can be any ID without having to search through drop-down windows.

### .2.5.5.4 Amount (drop-down box)

Choices might include something like the following: <P><B> - Any - <br> $10.00 [2002] <br> $25.00 [2003] <br> $50.00 [2004] <br> $100.00 [2005] <br> Other Amount [2006] </B>

### .2.5.5.5 Color (drop-down box)

Possible choices might include: <B><br> - Any - <br> Black [9000] <br> Silver [9001] </B>

### .2.5.5.6 Hazmat ()drop-down box)

Choices could be stated as: <br><B> - Any - <br> Hazmat [1000] <br> Non-Hazmat [1001] </B>

### .2.5.5.7 License (drop-down box)

Choices might include: <B> <P> - Any - <br> BSD [8002] <br> GPL [8001] <br> LGPL [8000] <br> MIT [8003] </B>

### .2.5.5.8 Size (drop-down box)

Sizes might be expressed as: <B> <br> - Any - <br> 3-Wheel [9002] <br> 4-Wheel [9003] </B>

### .2.5.5.9 Style (drop-down box)

Style choices might include: <br> <B> - Any - <br> Classic [2000] <br> Holiday [2001] </B>

### .2.5.5.10 Type (drop-down box)

Types could be presented as the following: <B> <br> - Any - Gift Card Type - See idCode [2008] <br> Gift Card Type - See idCode [2009] </B>

### .2.5.5.11 Supplier (drop-down box)

Suppliers listed as such in your Party Manager are presented in the drop-down box. <P> This should not be specified unless you wish to exclude items from any Supplier EXCEPT the selected one.

### .2.5.5.12 Sort Order (drop-down box)

Select a sort-order basis from the drop-down box, then choose a radio button for 'High to Low' or 'Low to High.' <P> Choices for the sort basis might include:<B> <br> Keyword Relevancy <br> Product Name <br> Internal Name <br> Popularity by Orders <br> Popularity by Views <br> Customer Rating <br> List Price <br> Default Price <br> Average Cost <br> Minimum Price <br> Maximum Price </B>

### .2.5.5.13 Last Search

Details of the last search and an option to start a new search or refine the last search are given.

## .2.6 Product Jump

This time-saving tool will take you directly to the working tab of the Catalog Manager with known data already populated for whatever item you enter.

### .2.6.1 Item sought

This is the working box to the left of the Product Jump drop-down box. Enter an attribute, a feature, the product ID, whatever known factor you are wanting to work with.

### .2.6.2 Jump-to box

Click on the <B>-Product Jump-</B> drop down box. Select the topic to which you wish to jump and you will be immediately taken to the appropriate working screen. An example is shown below.<P> Possible destinations for the Product Jump may include:<B><br> QuickAdmin <br> Product <br> Prices <br> Content <br> IDs <br> Categories <br> Keywords <br> Associations <br> Manufacturing <br> Costs <br> Attributes <br> Features <br> Facilities <br> Locations <br> Inventory <br> Suppliers <br> Accounts <br> Variants <br> Configurations </B>

### .2.6.3 Found-Example

id:[10816] image:

Avoid the need to click through tabs and trees by using the Product Jump drop-down box and the needed Product.

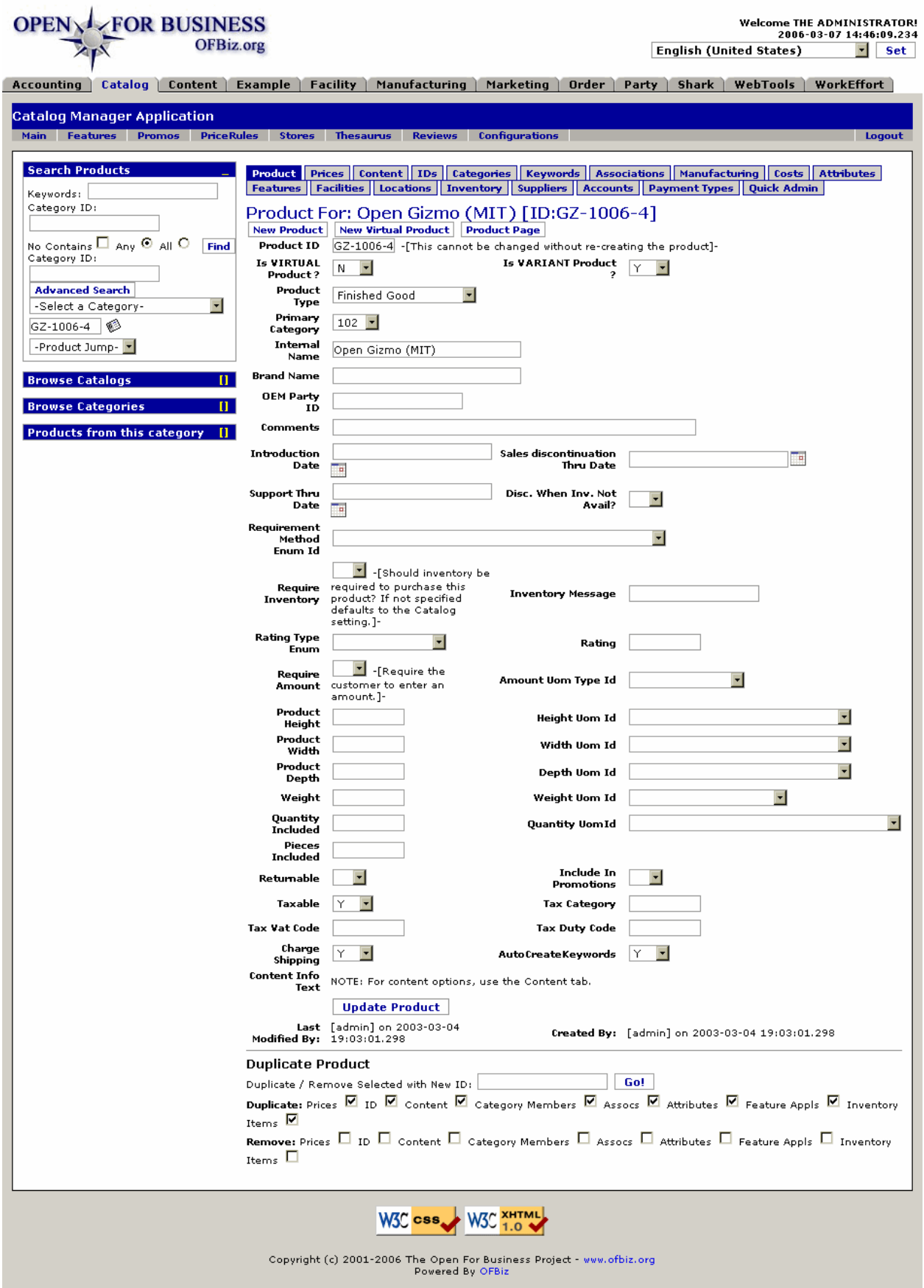
## .2.7 Product Found!

### .2.7.1 Discussion

When you have found the Product or Item you have sought, in a list, just click on the ID number! You will be taken directly to the screen shown below, labeled Product-Found. <p> Note all of the Tabs across the top of the screen where you can perform a multitude of tasks related to the product, its categories and catalogs. Each of the major tabs and their sub-tabs are discussed in the topics following. <P> Note also the many functions available to work with your products or services and present them in your Catalog. These will all be discussed under their tab-topics, below.

### .2.7.2 Product-Found

id:[13203] image:




When a Product ID is clicked upon as a link, you are brought to this screen for that Product. Select any tab - the product will follow.

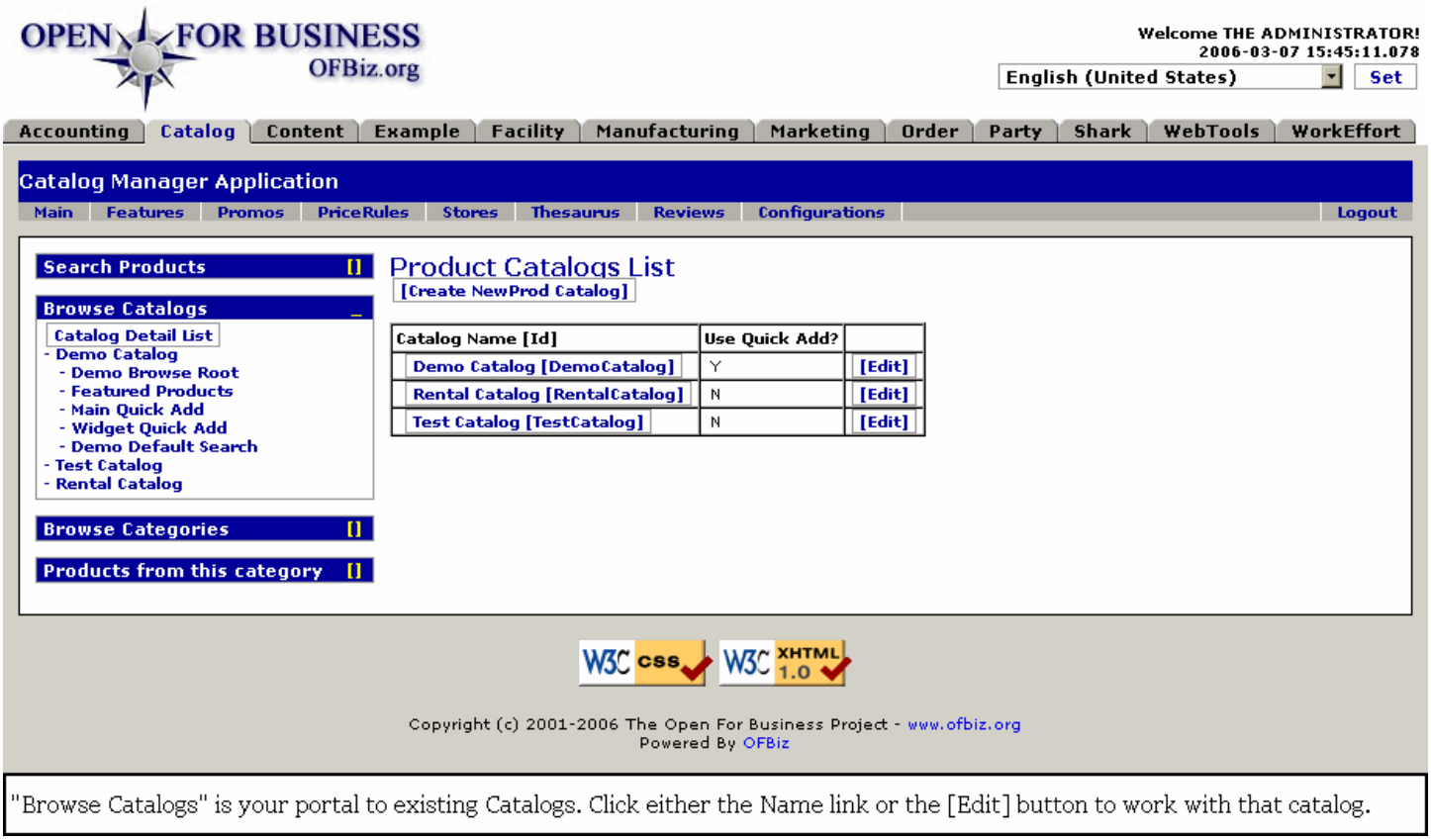
# .3 Browse Catalogs

## .3.1 Catalog Detail List

[Catalog Detail List] is the link button to open the table of existing catalogs, shown below. Alternately, you can click on one of the Catalogs listed in the Navigation box to find Categories within the Catalogs from which you could select.

## .3.2 FindProdCatalog

id:[DOCCAT803] image:




"Browse Catalogs" is your portal to existing Catalogs. Click either the Name link or the [Edit] button to work with that catalog.

## .3.3 link buttons

[Create NewProd Catalog] [Edit]

## .3.4 Table of Existing Catalogs

### .3.4.1 Catalog Name ID

Select either [Edit] or the catalog [ID] to link to the Edit Catalog screens.

### .3.4.2 Use Quick Add?

If the Catalog is set up to work with the QuickAdd function, a Y for yes will appear here.

### .3.4.3 Edit catalog

#### .3.4.3.1 EditProdCatalog

Here you may perform top-level editing of the catalog's name, log, style, file paths, etc.

### .3.4.3.2 link buttons

[NewProd Catalog] [Update] <B>[Catalog] [Stores] [Parties] [Categories]</B>

### .3.4.3.3 Discussion

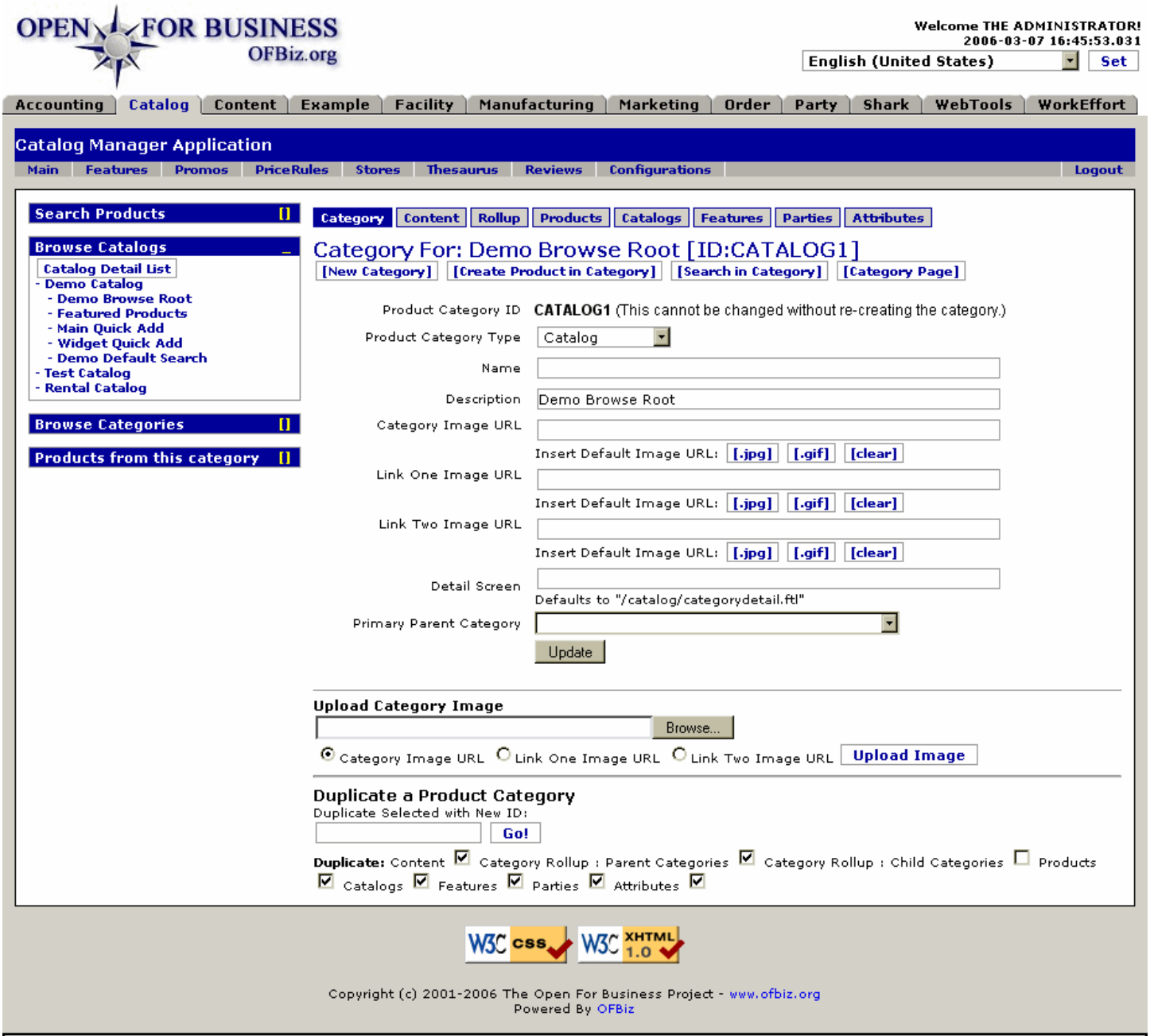
See more complete treatment of the edit function below under <B> Catalog - Edit Product Catalog screens</B>.

## .3.5 Catalog Categories

### .3.5.1 Discussion

Most catalogs have several categories of products within them. Some products will be found in multiple categories. <P> Here in the Navigation bar you can see where the opportunity to Browse Categories is presented. There is also this other approach through the Browse Catalogs section to take a shortcut to major Categories. <p> When you click on the Catalog name, a listing of indented Categories appears. Click on any of them to be taken to the Edit Categories screen for that category. <p> For details of the Category editing process, see below in the <B>Category - Edit Category screens</B> section.

### .3.5.2 EditCategory




This is the top-level working screen for editing Product Categories under a Catalog. Note the many links to related tasks.

## .3.5.3 link buttons

[New Category] [Create Product in Category] [Search in Category] [Category Page] [.jpg] [.gif] [clear] [Update] [Browse] [Upload Image] [Go!]<B> [Category] [Content] [Rollup] [Products] [Catalogs] [Features] [Parties] [Attributes]</B>

# .4 Browse Categories

## .4.1 Categories With No Parent Category

### .4.1.1 ChooseTopCategory

id:[10354] image:

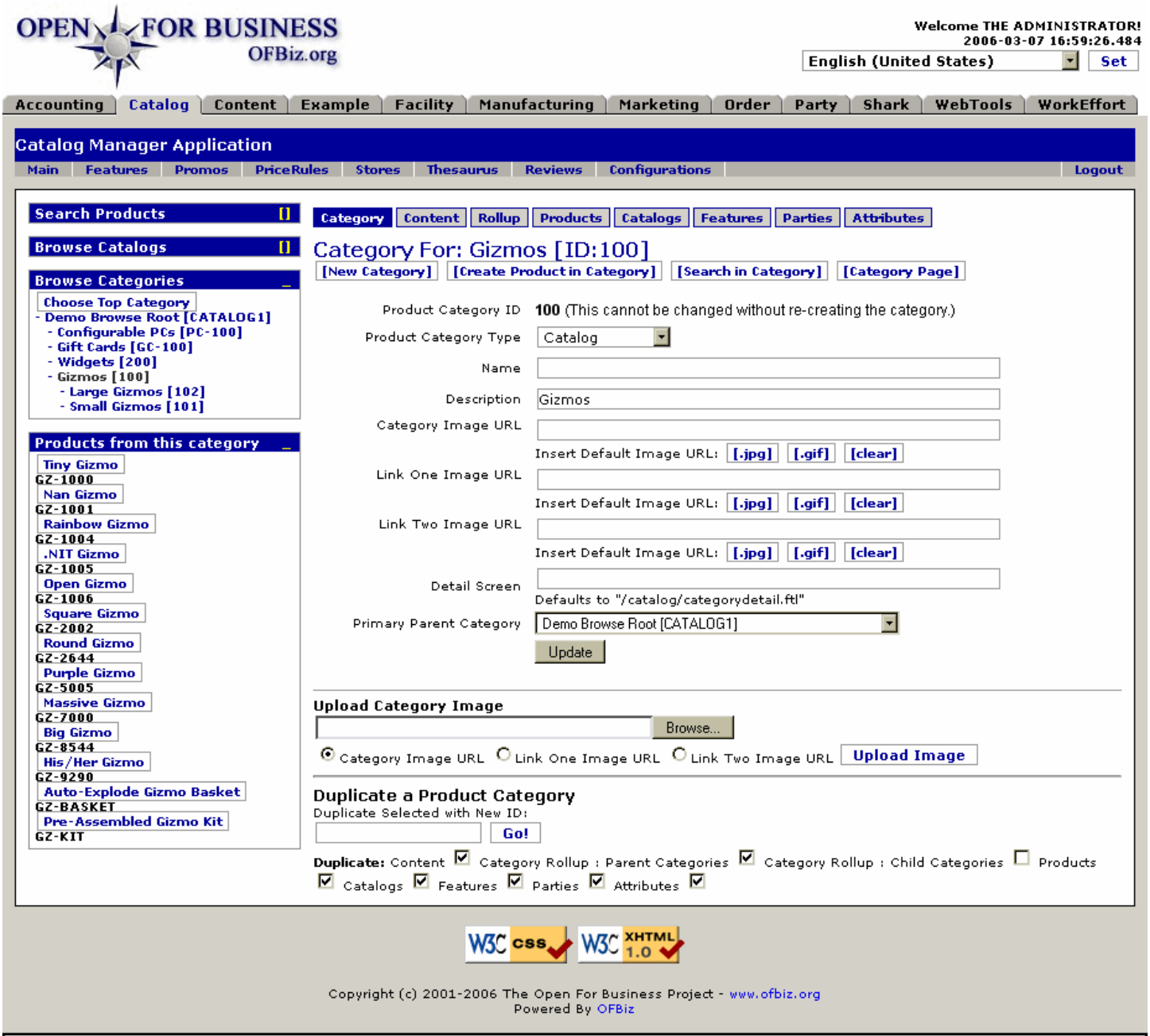
These are Top Level categories, not subordinate to a higher Parent; your list will differ. Click on a Category to edit.

### .4.1.2 Choose category

Selecting any of the listed Top Categories takes you to the Edit Category screen.

## .4.2 Edit Category

### .4.2.1 EditCategory




Edit the selected Category, starting with this screen. Other tabs shown will carry the same Category into their topics.

## .4.2.2 link buttons

[Choose Top Category] [New Category] [Create Product in Category] [Search in Category] [Category Page] [.jpg] [.gif] [clear] [Update] [Browse] [Upload Image] [Go!]<B> [Category] [Content] [Rollup] [Products] [Catalogs] [Features] [Parties] [Attributes] </B>

## .4.2.3 Details follow

Detailed discussion of the processes and their related screens are discussed below under <B>Category - Edit Category screens</B>.

# .5 Category Products

## .5.1 CategoryProducts

id:[10236] image:

When a Category is selected (in this case: Small Gizmos), products in that Category are listed here. Click the Product Name to go to that Product's edit screen.

# .6 Main: Catalog Administration Main Page

## .6.1 main

id:[DOCCAT826] image:

This is the screen greeting you when you start Open For Business or later click on the Main tab of the Catalog Manager.

## .6.2 link buttons

[Edit Catalog] [Create New Catalog] [Edit Category] [Create New Category] [Edit Product] [Create New Product] [Quick Create Virtual from Variants] [Find Product] [Auto Create Keywords for All Products] [Fast Load Catalog into Cache]

## .6.3 Opening Screen

Your first screen when opening OFBiz presents you with a wealth of options. The Navigation Panel on the left has already been discussed above. Select any Tab (from the top row of tabs) to be taken from here to other Managers within OFBiz. Or select one of the functions discussed below to perform operations within the Catalog Manager application.

## .6.4 Edit Catalog with Catalog ID:

Takes you to the Edit Catalog screen for the Catalog ID you have entered. [Create New Catalog] screen is similar but blank and should be used to create a new Catalog. The same Create screen appears when you click on [New Prod Catalog] from the Edit Catalog screen.<P> See <B>Catalog - Edit Product Catalog screens</B> below for details.

## .6.5 Edit Category with Category ID:

Takes you to the Edit Category screen for the Category ID you have entered. [Create New Category] screen is similar but blank and should be used to create a new Category. The same Create screen appears when you click on [New Category] from the Edit Category screen.<p> For further details, see the topic <B>Category - Edit Category screens</B>, below.

## .6.6 Edit Product with Product ID:

Takes you to the Edit Product screen for the Product ID you have entered. [Create New Product] screen is similar but blank and should be used to create a new Product. The same Create screen appears when you click on [New Product] from the Edit Product screen.<p> For further details, see the topic <B>Product - new Product or edit</B>, below.

## .6.7 Find Product with ID Value:

Takes you to the Find Product screen shown below. When you enter a valid ID, the Product Name is shown in a boxed link; click on that Name to go to the Product page.

### .6.7.1 FindProductByID

id:[11632] image:

Results of a Find Product search. Click on the Product Name to be taken to the EditProduct screen.

### .6.7.2 link buttons

[Find]

## .6.8 Auto Create Keywords for All Products

When selected, performs a keyword creation for all existing products. >> Resulting screen message, e.g.: 'The Following Occurred: Keyword creation complete for 47 products.'

## .6.9 Fast Load Catalog into Cache

### .6.9.1 Resulting code report after loading cache:

id:[10021] image:

Results on screen from clicking the [Fast Load Catalog into Cache] link.

# .7 Catalog - Edit Product Catalog screens

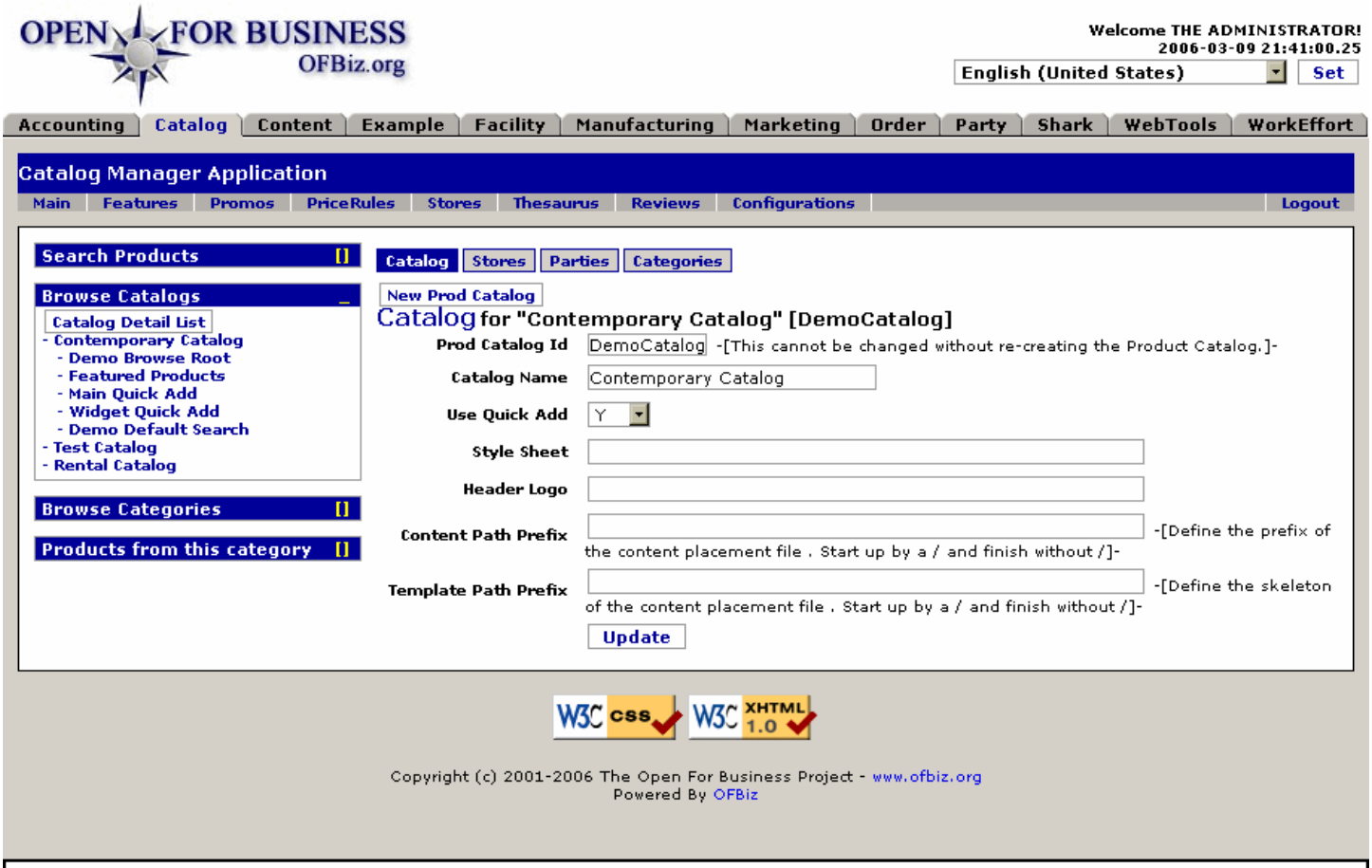
## .7.1 Discussion of the Edit Catalog screens

You will be taken to the Edit Catalog screens whenever you select a catalog by name or ID from the Browse Catalogs tool, from the Catalog Administration Main Page - Edit Catalog tool, or from anywhere in the entire OFBiz application where you might have clicked upon the actively linked catalog name or ID. <P> From within this Edit Catalog tool, you may also be taken as needed to other tools, such as the Party Manager or the Category Edit screen. This is part of the dynamics of OFBiz. <P> For the sake of simplicity, to reduce redundancy, explanations are given only up to the linked application. Please look elsewhere in this documentation to find further information.

## .7.2 Catalog

### .7.2.1 EditProdCatalog

id:[DOCCAT1196] image:




Top-level editing of a Catalog name, log and location, with sub-tabs to other functions.

### .7.2.2 link buttons

[Update] [New Prod Catalog] <B> [Catalog] [Stores] [Parties] [Categories] </B>

### .7.2.3 Prod Catalog ID

This cannot be changed without re-creating the Product Catalog.

### .7.2.4 Catalog Name

This will be shown to your customers, so think of image when giving your catalog a name.

### .7.2.5 Use Quick Add (Y/N)

You cannot use the QuickAdd function unless you elect to have it by your choice here.

### .7.2.6 Style Sheet

The path to your distinctive style sheet which will govern the appearance of your catalog goes here.

### .7.2.7 Header Logo

This will be seen by your customers. Maintain your image and message with the logo presented.

### .7.2.8 Content Path Prefix

If specified will be prepended to image and other content paths. Should start with a slash but not end with one.

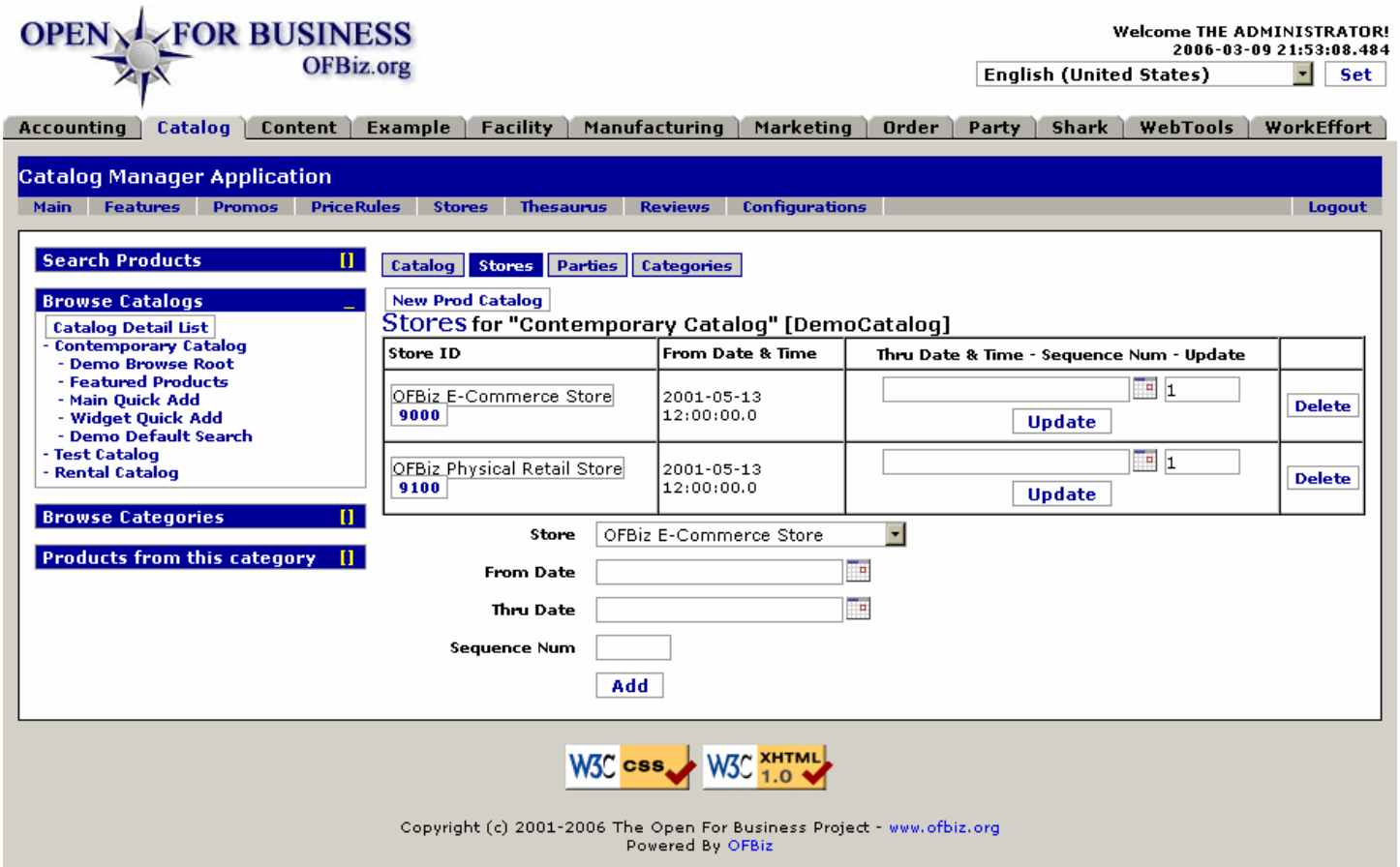
### .7.2.9 Template Path Prefix

If specified will be prepended to template paths. Should start with a slash but not end with one.

## .7.3 Stores

### .7.3.1 EditProdCatalogStores

id:[DOCCAT1205] image:




Update, add or delete Stores served by this Catalog. Time limits may be invoked.

### .7.3.2 link buttons

[New Prod Catalog] [Update] [Delete] [Add] <B>[Catalog] [Stores] [Parties] [Categories] </B>

### .7.3.3 Table of existing stores

#### .7.3.3.1 Store ID

How the Store is identified by the system.

#### .7.3.3.2 From Date and Time

When the Store assignment was made.

#### .7.3.3.3 Thru Date and Time (popup calendar)

Expiration of the assignment, if any. May be changed here within the table.

#### .7.3.3.4 Sequence Num

May be assigned a Sequence Number; optional.

### .7.3.4 Tool to add stores

#### .7.3.4.1 Store (drop-down box)

Select the store for assignment from the drop-down box list of existing Stores.

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

Defaults to Now as this is generally the time when the assignment is first made. May be modified with a historical date for records purposes or a future date if the assignment is being made before the Catalog will be applicable.

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

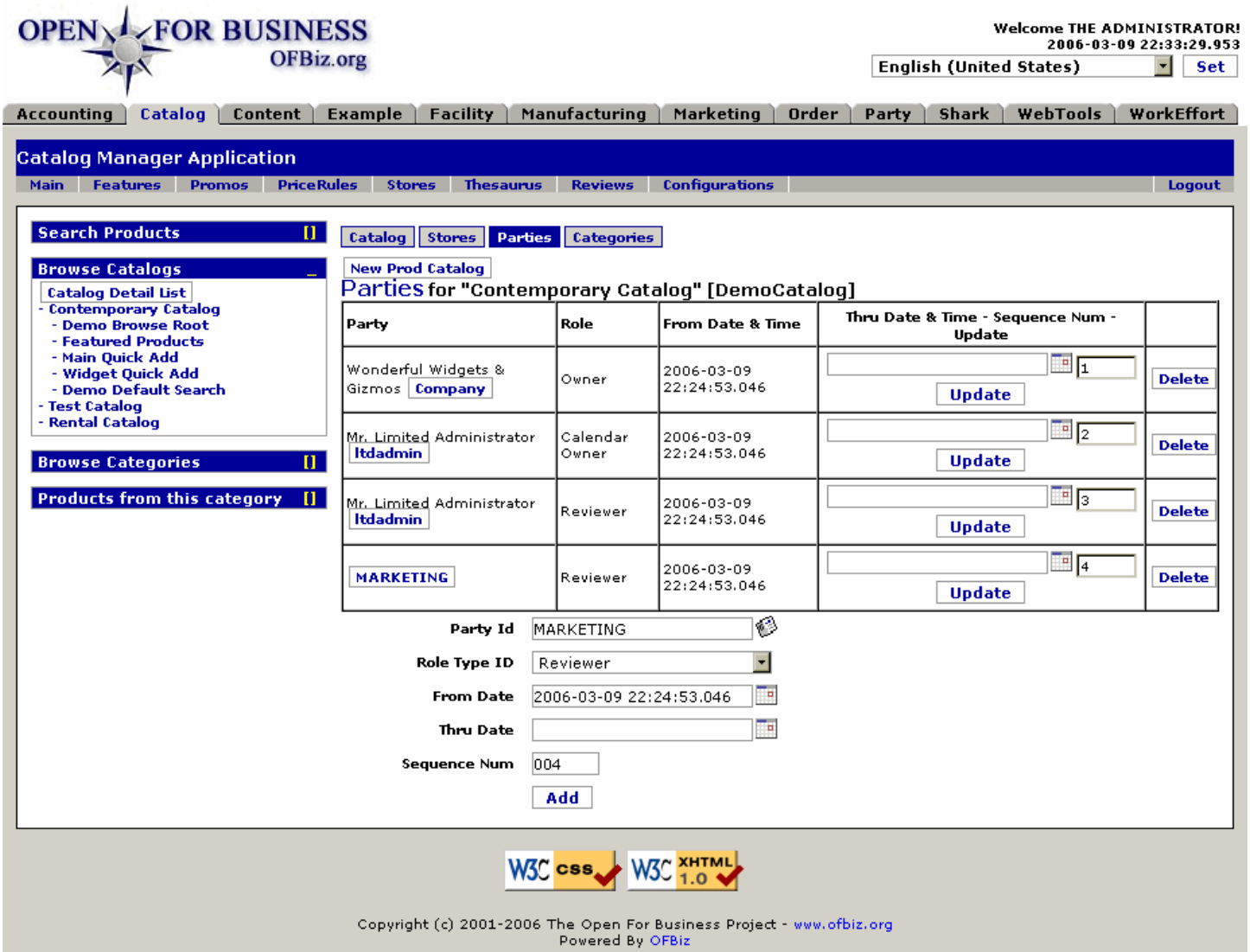
Only if the assignment needs to expire at some future point.

#### .7.3.4.4 Sequence Num

An optional Sequencing number, used if there is sequencing of catalogs or stores.

## .7.4 Parties

### .7.4.1 EditProdCatalogParties




Identify which Parties have a role to play in the development, maintenance and administration of this Catalog at this screen.

## .7.4.2 link buttons

[New Prod Catalog] [Update] [Delete] [Add] <B>[Catalog] [Stores] [Parties] [Categories] </B>

## .7.4.3 Table of existing parties

### .7.4.3.1 Party

Shows both the Name and the ID if the Party has a name. <br> Note: You should not associate each Customer with the Catalog Store.

### .7.4.3.2 Role

What does the Party do in relation to the Catalog?

### .7.4.3.3 From Date and Time

Generally when the assignment was made; automatically inserted at the time of creation.

### .7.4.3.4 Thru Date and Time (popup calendar)

Only specified if the association is to expire at some point.

#### .7.4.3.5 Sequence Num

Optional.

### .7.4.4 Tool to add parties

#### .7.4.4.1 Party ID

Popup search tool presents all existing Parties; select the one you want.

#### .7.4.4.2 Role Type ID (drop-down box)

Assign the Role from this drop-down list. <P> You cannot designate a Role here if the Party has not already had that Role assigned to in from the Party Manager. If you get an error message when trying to select a Role, go to the Party Manager > Roles tab and establish the Role for the Party there first. If the Role Type you want does not exist, you can create it at the Party Roles tab.

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

Defaults to the time of creation unless you choose differently.

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

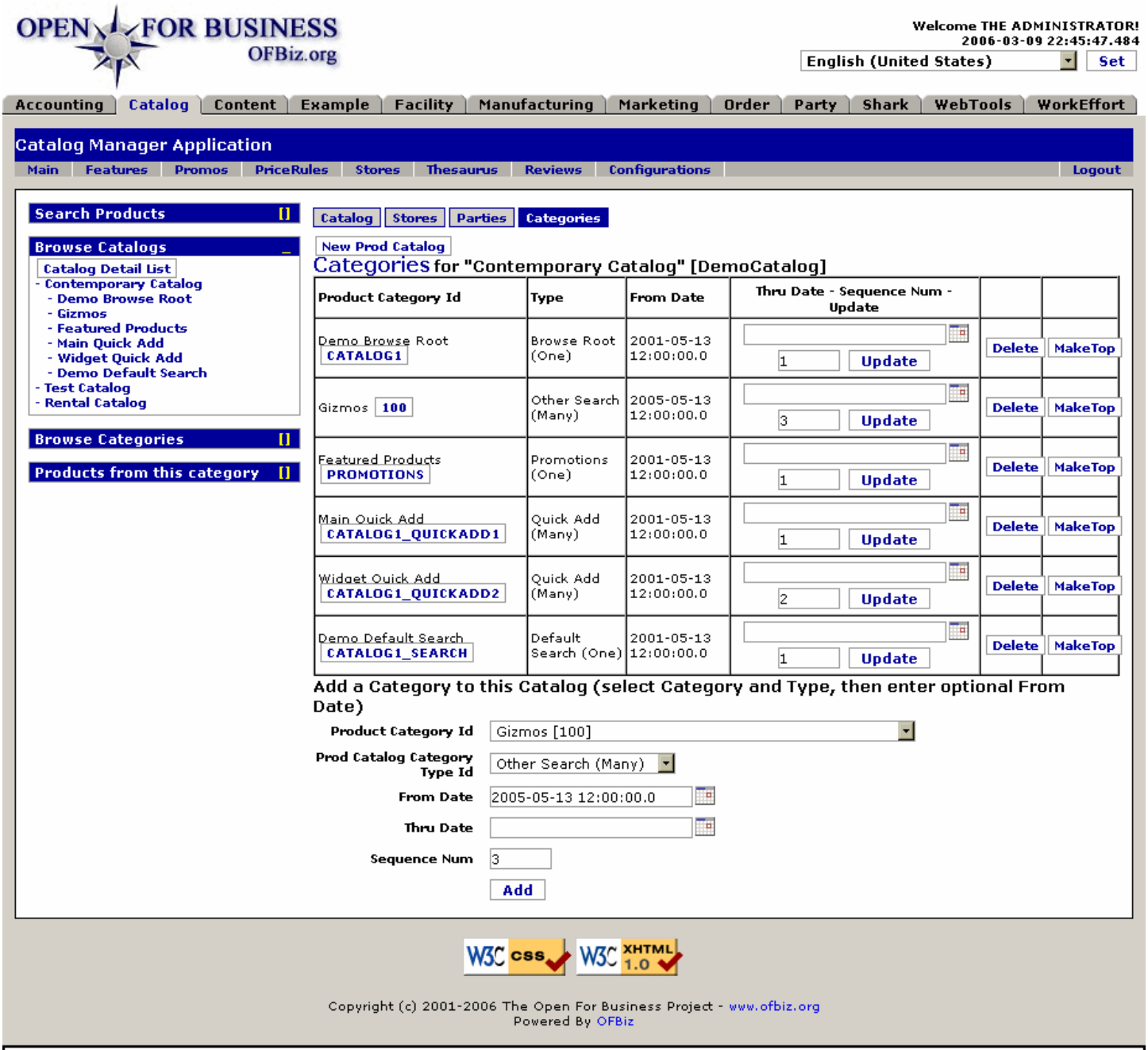
Do not include unless the association is to expire at some future point.

#### .7.4.4.5 Sequence Num

Optional.

## .7.5 Categories

### .7.5.1 EditProdCatalogCategories




Update, add, delete or schedule Categories for the Catalog from this screen.

## .7.5.2 link buttons

[New Prod Catalog] [Update] [Delete] [Make Top] [Add] <B>[Catalog] [Stores] [Parties] [Categories] </B>

## .7.5.3 Table of existing Categories

### .7.5.3.1 Product Category ID

Includes Product Category name and ID.

### .7.5.3.2 Type

Refers to the promotional type of relationship.

#### .7.5.3.3 From Date and Time

When was this assigned?

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

When does this expire? You can update an expiration date from this table.

#### .7.5.3.5 Sequence Num

Sequence number in relation to other categories associated with this Catalog.

### .7.5.4 Tool to Add Catalog Product Category

#### .7.5.4.1 Product Category ID (drop-down box)

Select from the drop-down box.

#### .7.5.4.2 Prod Catalog Category Type Id (drop-down box)

Promotional type of descriptive relationships. Types available from the drop-down box might include: <P><B> --- <br> Admin Allow (One) <br> Browse Root (One) <br> Default Search (One) <br> Most Popular (One) <br> Other Search (Many) <br> Promotions (One) <br> Purchase Allow (One) <br> Quick Add (Many) <br> View Allow (One) <br> What's New (One) </B>

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

Defaults to Now when an assignment is made. Alternately you can set the past date when the Category was established or a future date when the Category will be effective.

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

Optional expiration date.

#### .7.5.4.5 Sequence Num

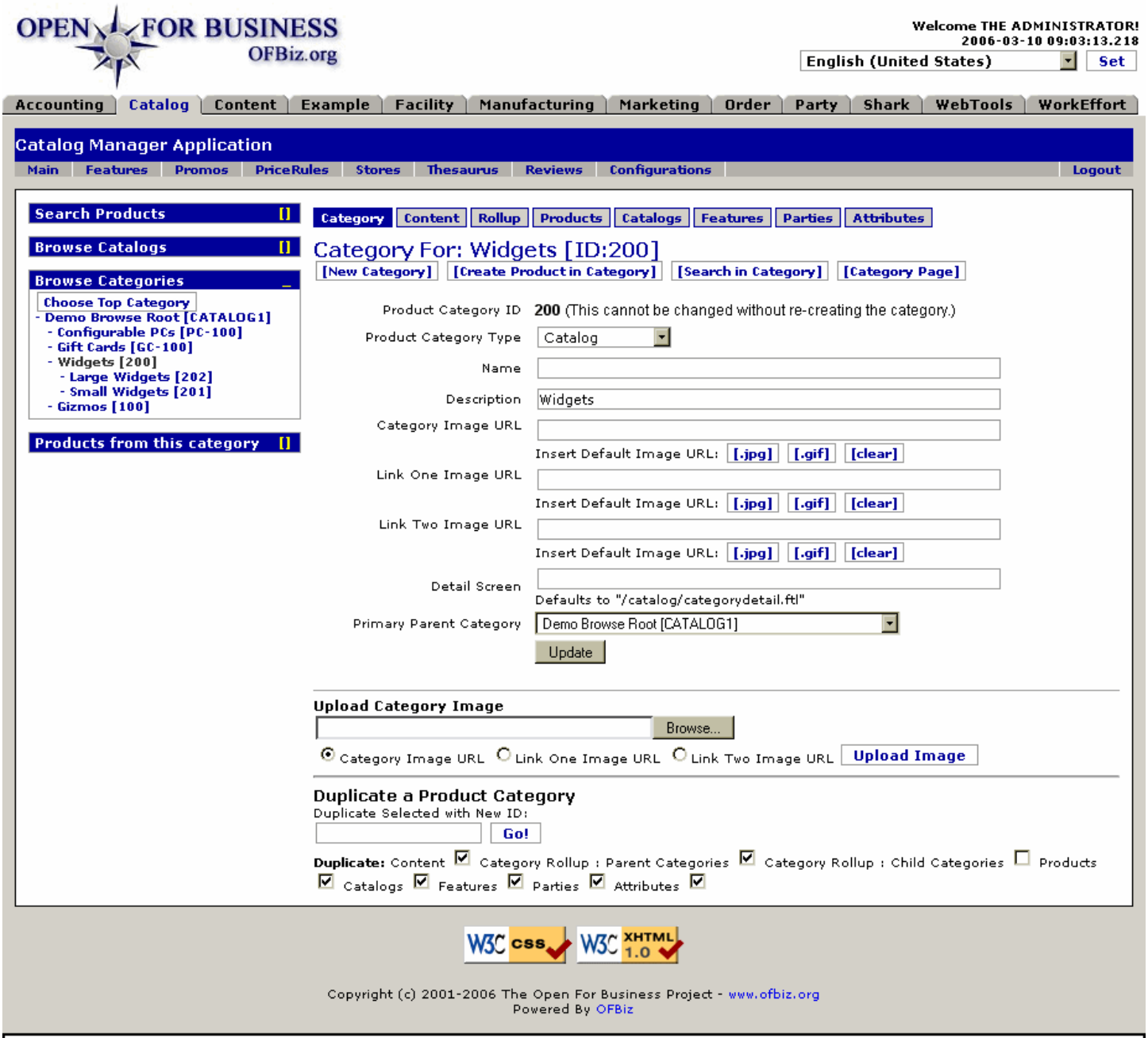
Optional sequencing number.

# .8 Category - Edit Category screens

## .8.1 Category

### .8.1.1 EditCategory

id:[DOCCAT1244] image:




Begin the edit of a selected Product Category's screens here.Sub-tabs carry the same Category as you navigate them.

### .8.1.2 link buttons

[New Category] [Create Product in Category] [Search in Category] [Category Page] [Update] [.jpg] [.gif] [clear] [Browse] [Upload Image] [Go!] <B> [Category] [Content] [Rollup] [Products] [Catalogs] [Features] [Parties] [Attributes] </B>

### .8.1.3 Product Category ID

'This cannot be changed without re-creating the category.' Confirms which item you are viewing or editing.

### .8.1.4 Product Category Type (drop-down box)

The default is Catalog. Possible choices might include: <P><B> Catalog <br> Cross Sell <br> Industry <br> Internal <br> Materials <br> Mix and Match <br> Quick Add <br> Search <br> Tax <br> Usage </B>

### .8.1.5 Name

Because the name can be quickly changed without changing the ID, you can use the same basic catalog in a variety of circumstances and match the name to fit.

### .8.1.6 Description

Put just a short description here.

### .8.1.7 Category Image URL

Same upload tool for most image assignments. This is the path of any images to be displayed. The image is accessed by url.

### .8.1.8 Link One Image URL

For dynamically linking to an image available to your server.

### .8.1.9 Link Two Image URL

Same as Link One, but for a separate image.

### .8.1.10 Detail Screen

Defaults to '/catalog/categorydetail.ftl'

### .8.1.11 Primary Parent Category (drop-down box)

This is where the top level for this category lives. A major unit (e.g. 'Groceries') might have 'Demo Browse Root' (and so hang off the top level of navigation) but lesser units would have levels of sub-navigation.

### .8.1.12 Upload Category Image

Three radio buttons: Category Image URL / Link One Image URL / Link One Image URL. Choose the right one, then specify or locate [Browse] the URL. Press [Upload] to complete the connection.

### .8.1.13 Duplicate a Product Category

Make another Product Category similar to the selected one instantly! Follow these steps: <br> 1. Enter a New ID in the box. <br> 2. Click on the checkboxes until they reflect which parts of this Product Category you wish to continue into the new one. (Remember, you can edit these after the new Product Category is created.) <br> 3. Click the link [Go!].

### .8.1.14 New Category screen

Takes you to the same screen except you specify new Product Category ID.

#### .8.1.14.1 EditCategory-new

Fields are as described in the top section, above, except you create the Product Category ID. Click [Update] to create.

## .8.1.15 Create Product in Category screen

Items for data entry dependent upon several factors; following are typical.

### .8.1.15.1 createProductInCategoryStart

Tool for creating a new Product in the Category. Click [Check Existing] to proceed.

### .8.1.15.2 link buttons

[Back to Edit Category] [Check Existing] [New Category] [Create Product in Category] [Search in Category] [Category Page] <B> [Category] [Content] [Rollup] [Products] [Catalogs] [Features] [Parties] [Attributes] </B>

### .8.1.15.3 Internal Name

The name used for this product internally to the company. Could be the name used by your supplier.

### .8.1.15.4 Product Name

The marketing or branding name which will be seen by your customers.

### .8.1.15.5 Short Description

This can be ad-talk or functional; what makes product different.

### .8.1.15.6 Default Price

The price charged in the absence of any promotional or volume purchasing considerations.

### .8.1.15.7 Average Cost

What the product costs you to have available to offer, on the average.

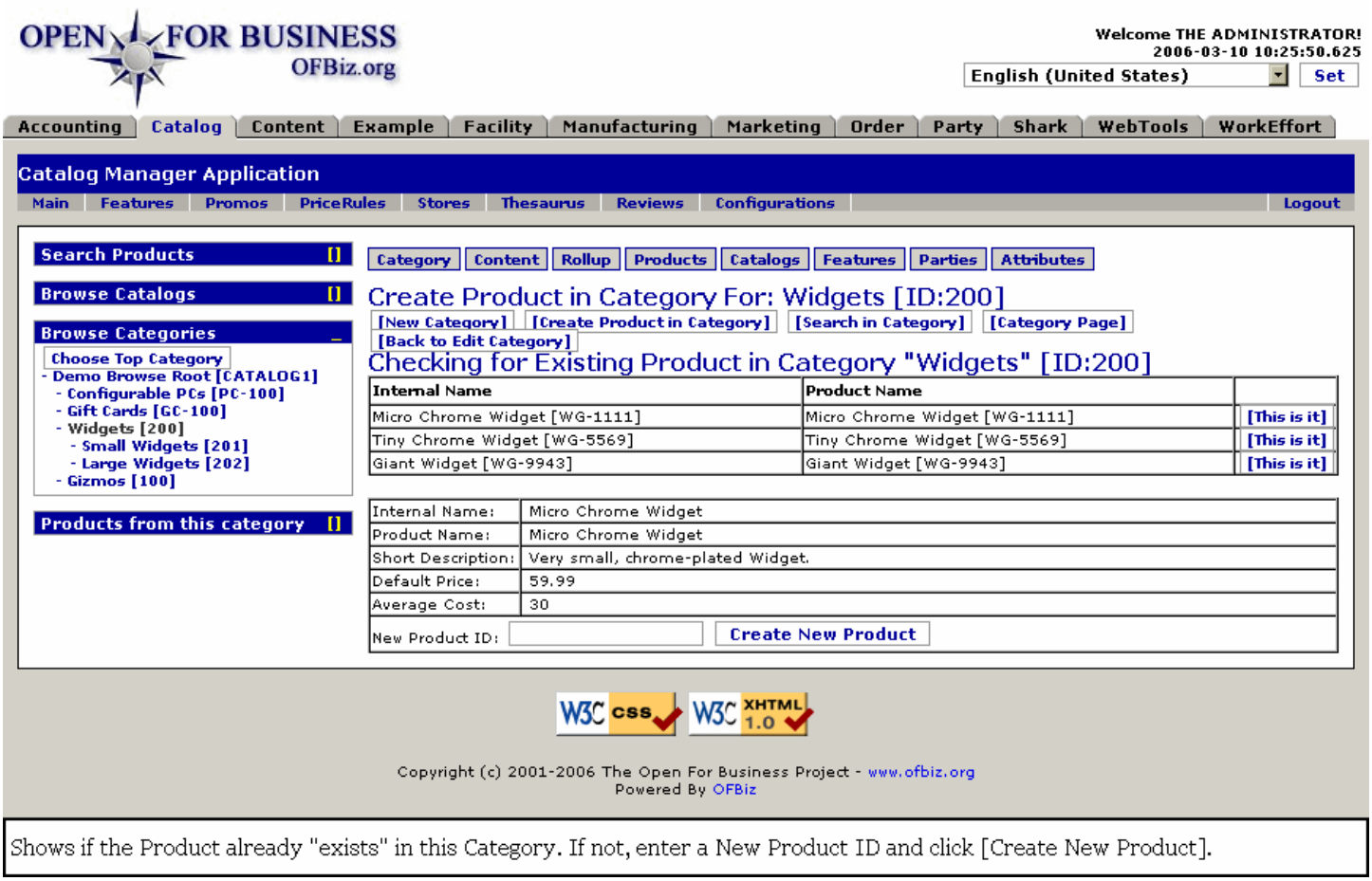
### .8.1.15.8 Check Existing screen

#### .8.1.15.8.1 Check Existing screen

Presents table of any/all existing products in selected category. Your newly-created (proposed addition) product is shown at the bottom of the screen. <P> Click on [Create New Product] when ready.

#### .8.1.15.8.2 createProductInCategoryCheckExisting

id:[DOCCAT1259] image:




Shows if the Product already "exists" in this Category. If not, enter a New Product ID and click [Create New Product].

### .8.1.15.8.3 link buttons

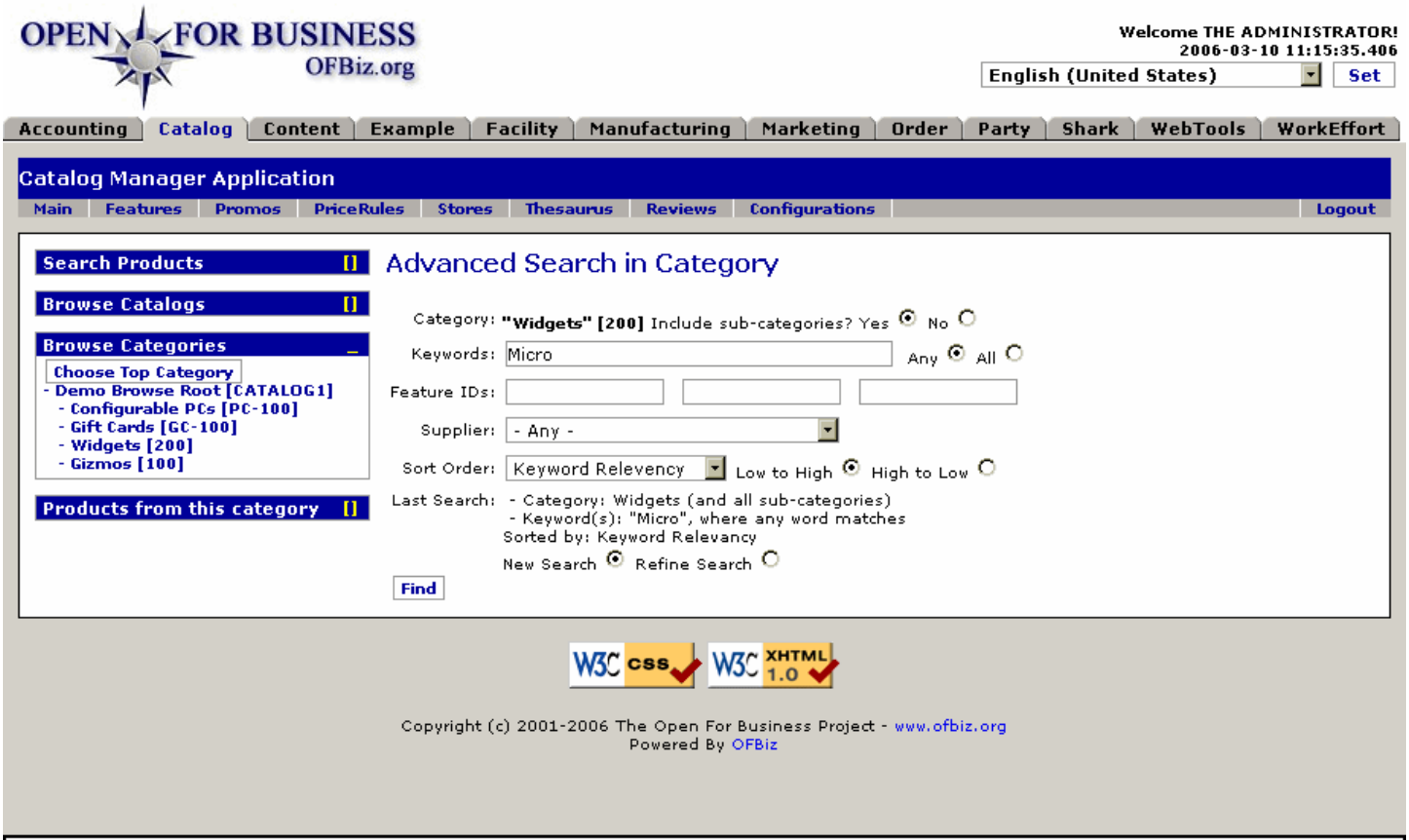
[This is it] [Create New Product] [Back to Edit Category] [New Category] [Create Product in Category] [Search in Category] [Category Page] <B> [Category] [Content] [Rollup] [Products] [Catalogs] [Features] [Parties] [Attributes] </B>

### .8.1.15.8.4 Discussion

At this point in the 'Create Product In Category' process, two paths exist to take you to the Product Edit > Categories screen. <p> 1.) If the Product you want appears in the Table, click on the [This is it] link which will take you to the Product Edit screen. Make any changes you need there, then click on the Categories tab. Here you can add the Product to any Category that exists. <P> 2.) If the Product does not exist, give it a Product ID, click on [Create New Product], and you will be at the same Product Edit screen. Complete the details there, then click on the Categories tab to add the product to the desired Categories. <P> These screens are discussed further below under the section <B> Product - new Product or edit</B>.

## .8.1.16 Search In Category screen

### .8.1.16.1 advancedsearch-inCategory




Advanced Search in Category helps you find any item or related items already assigned to the Category.

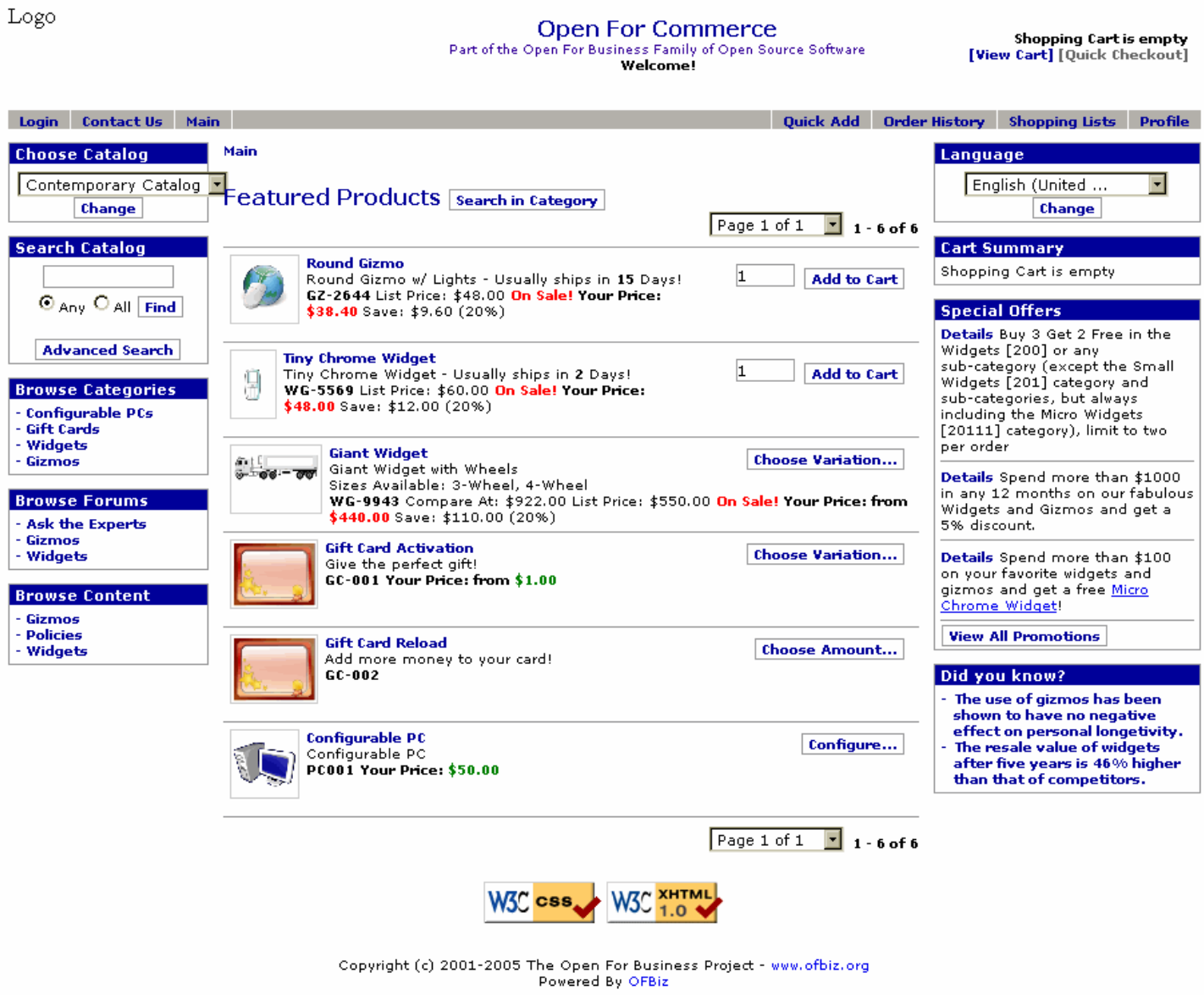
### .8.1.16.2 Discussion

This Advanced Search function has already been described above, under <B>Search Products</B> > Advanced Search. The only difference is that the Category is already populated from which your search will start.

## .8.1.17 Category Page

Takes you to the Featured Products - Search in Category screen in the active catalog.

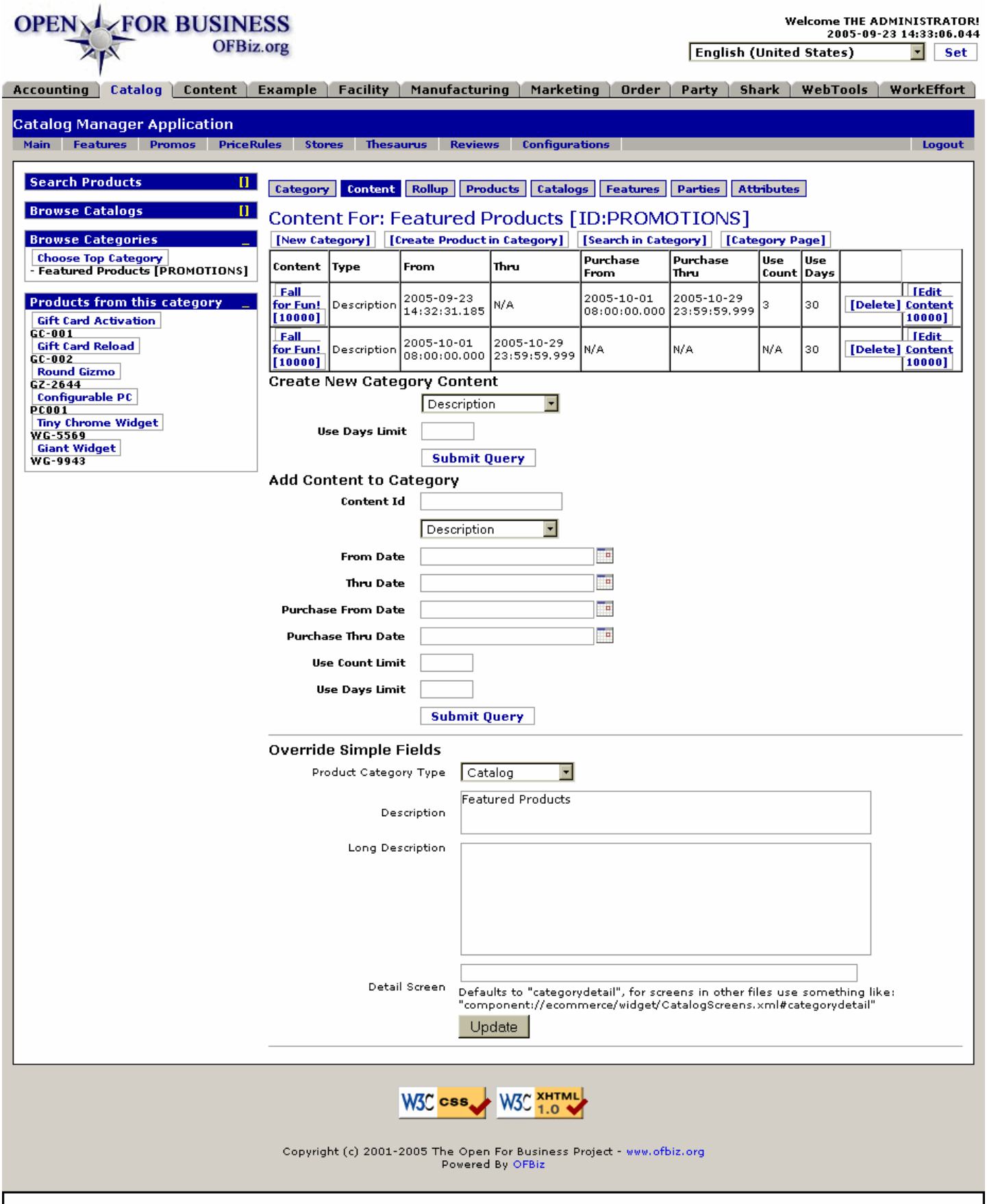
### .8.1.17.1 category




Shows you the e-commerce page in the current catalog with these Featured Products in the Category.

## .8.2 Content

### .8.2.1 editCategoryContent




Add or edit Content to the Category from this screen. [Edit Content ...] takes you to Content Manager.

## .8.2.2 link buttons

[New Category] [Create Product in Category] [Search in Category] [Category Page] [Delete] [Edit Content #] [Submit Query] [Update] <B> [Category] [Content] [Rollup] [Products] [Catalogs] [Features] [Parties] </B>

## .8.2.3 Table of existing content

### .8.2.3.1 Content

Click on the Name and ID to be taken to the EditCategoryContentContent screen where you can make changes or read the content.

### .8.2.3.2 Type

What type of content is this? Description, Long Description, Caption, Side-Bar, etc.

### .8.2.3.3 From

The date and time of creation or of effectivity.

### .8.2.3.4 Thru

When does the content expire or exceed its effectivity?

### .8.2.3.5 Purchase From

Applies to the purchase of product from this date and time.

### .8.2.3.6 Purchase Thru

May not apply to the purchase of products after this date and time.

### .8.2.3.7 Use Count

How many times a customer may use this promotion.

### .8.2.3.8 Use Days

How many days the promotion will be usable.

### .8.2.3.9 Note on Edit Content link

If you click on the [Edit Content ...] link to the right of the row, you will be editing the content under the Content Manager with greater options available to edit and refine your content.

## .8.2.4 Create New Category Content

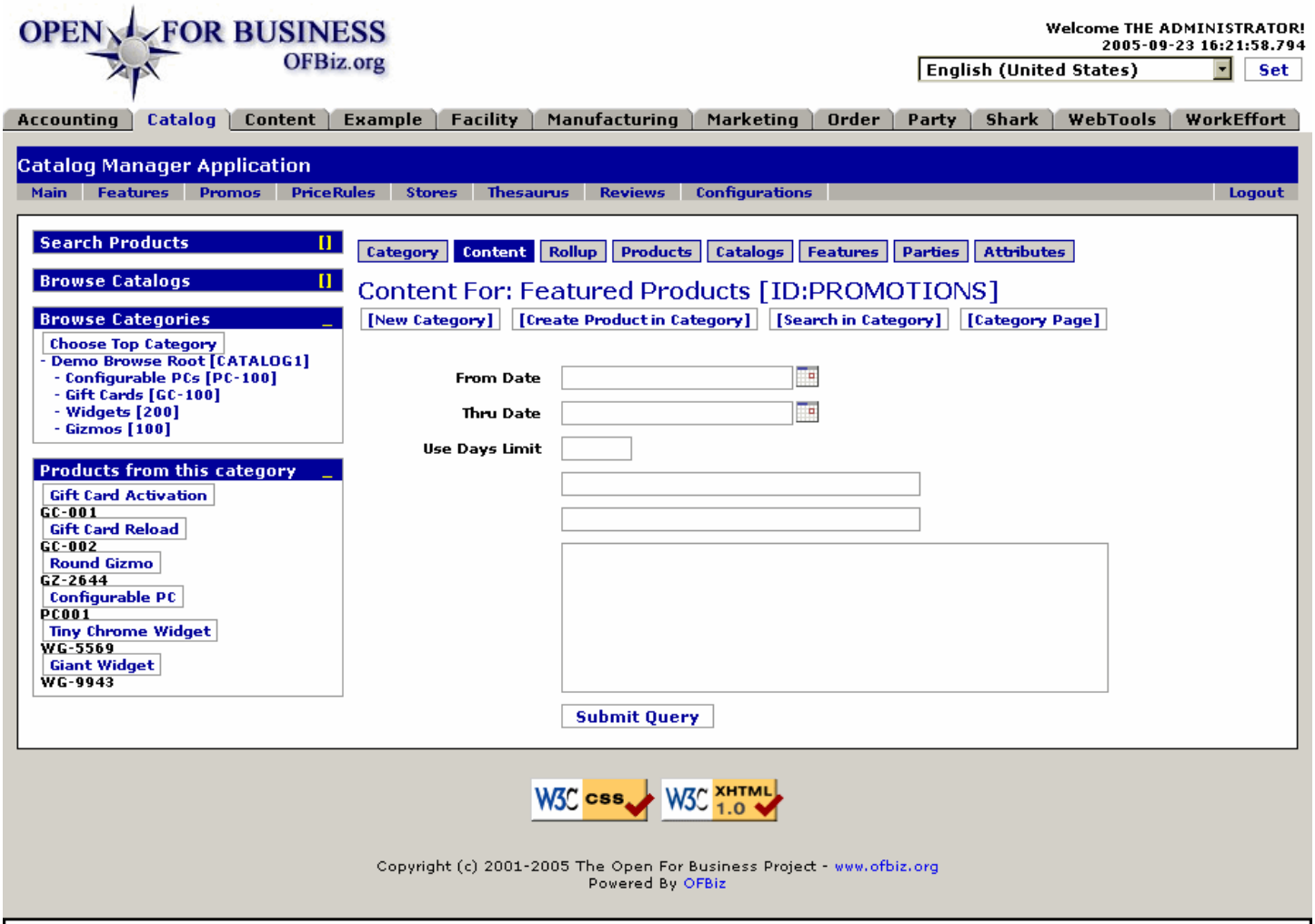
### .8.2.4.1 Content Type ID (drop-down box)

Assign a Content Type ID from the drop-down box.

### .8.2.4.2 Use Days Limit

How many days is the promotion to be effective?

### .8.2.4.3 prepareAddContentToCategory




When you click on the [Submit Query] link under Create New Category Content, this screen appears.

## .8.2.5 Add Content to Category (tool)

### .8.2.5.1 Content ID

What the Content will be known as.

### .8.2.5.2 Content Type ID (drop-down box)

Select a type from the drop-down box.

### .8.2.5.3 From Date (popup calendar)

Either accept the default (now at creation) by entering nothing, or identify the start of the effectivity.

### .8.2.5.4 Thru Date (popup calendar)

With nothing entered, the Thru Date will appear as 'N/A' but if there is a termination or expiration date, enter it here.

### .8.2.5.5 Purchase From Date (popup calendar)

Campaign dates may differ from the date of a sale. Enter here the date from which the promotion will apply to the sale of the product.

### .8.2.5.6 Purchase Thru Date (popup calendar)

When is the promotional period finished for the purchaser?

#### .8.2.5.7 Use Count Limit

How many times can a customer apply this promotion for his own purchases?

#### .8.2.5.8 Use Days Limit

How many sales days is the promotion limited to?

### .8.2.6 Override Simple Fields

#### .8.2.6.1 Product Category Type (drop-down box)

Select the type of Product Category from the drop-down box.

#### .8.2.6.2 Description

This line has to be short.

#### .8.2.6.3 Long Description

Give the long version here.

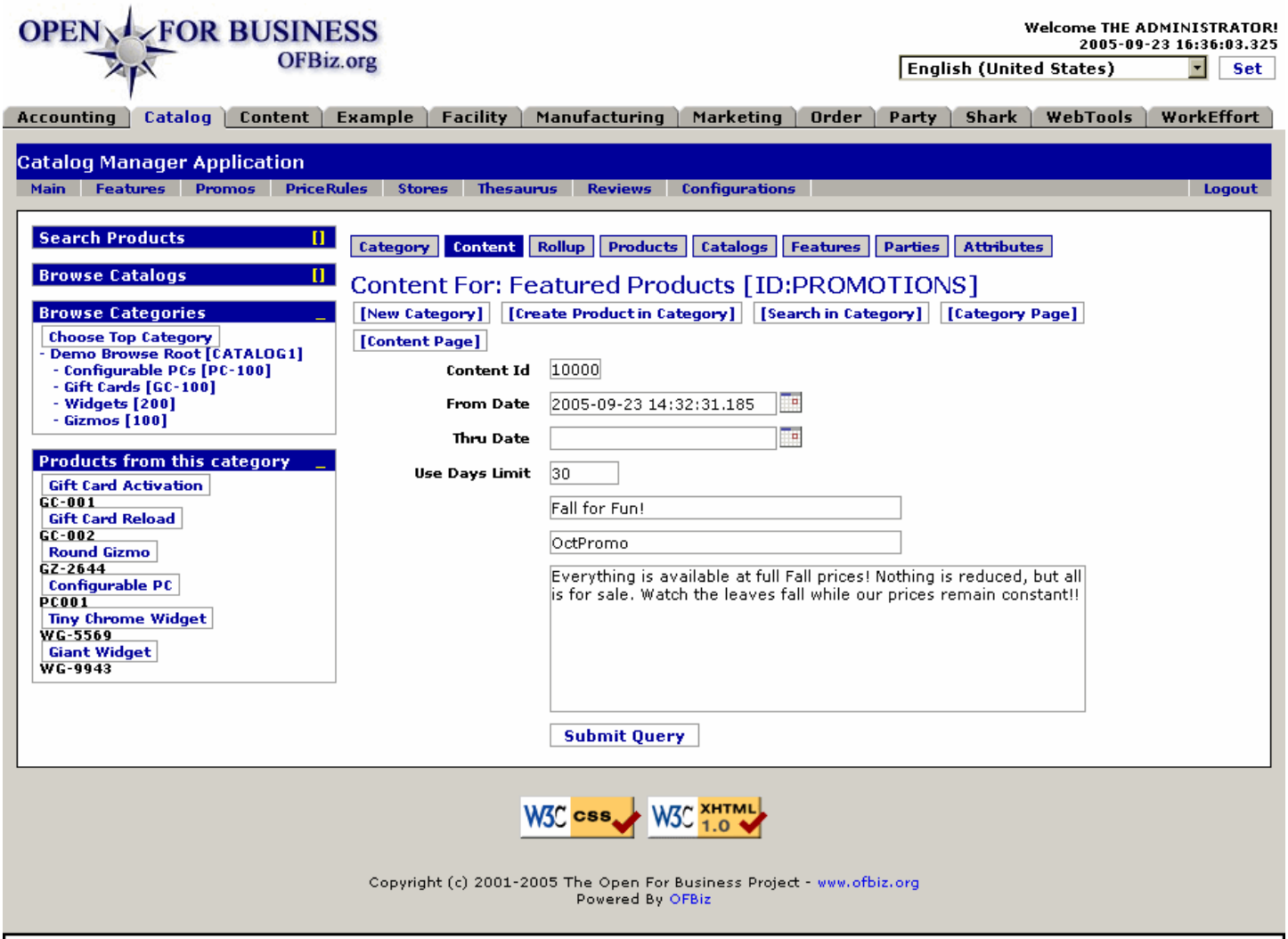
#### .8.2.6.4 Detail Screen

Defaults to 'categorydetail'; for screens in other files use something like: 'component://ecommerce/widget/CatalogScreens.xml# categorydetail'

### .8.2.7 Edit Category Content

There are two levels of editing available: High Level and Content Level. <P> In the left-hand column labeled 'Content' you can click on the Name of the Content to be taken to the high-level screen shown immediately below. This is for editing dates, labels and descriptions. <p> If you click on the far right-hand column where only the content ID is given, you are taken into the Content Manager for this particular content. There you will develop all of the aspects of the content. The screen is shown below; go to the Content Manager for more complete discussion of Content.

#### .8.2.7.1 EditCategoryContentContent




Click on the Name in the Content column to bring up this high-level edit screen.

### .8.2.7.2 link buttons

[Content Page] [Submit Query] [New Category] [Create Product in Category] [Search in Category] [Category Page]<B> [Category] [Content] [Rollup] [Products] [Catalogs] [Features] [Parties] [Attributes]</B>

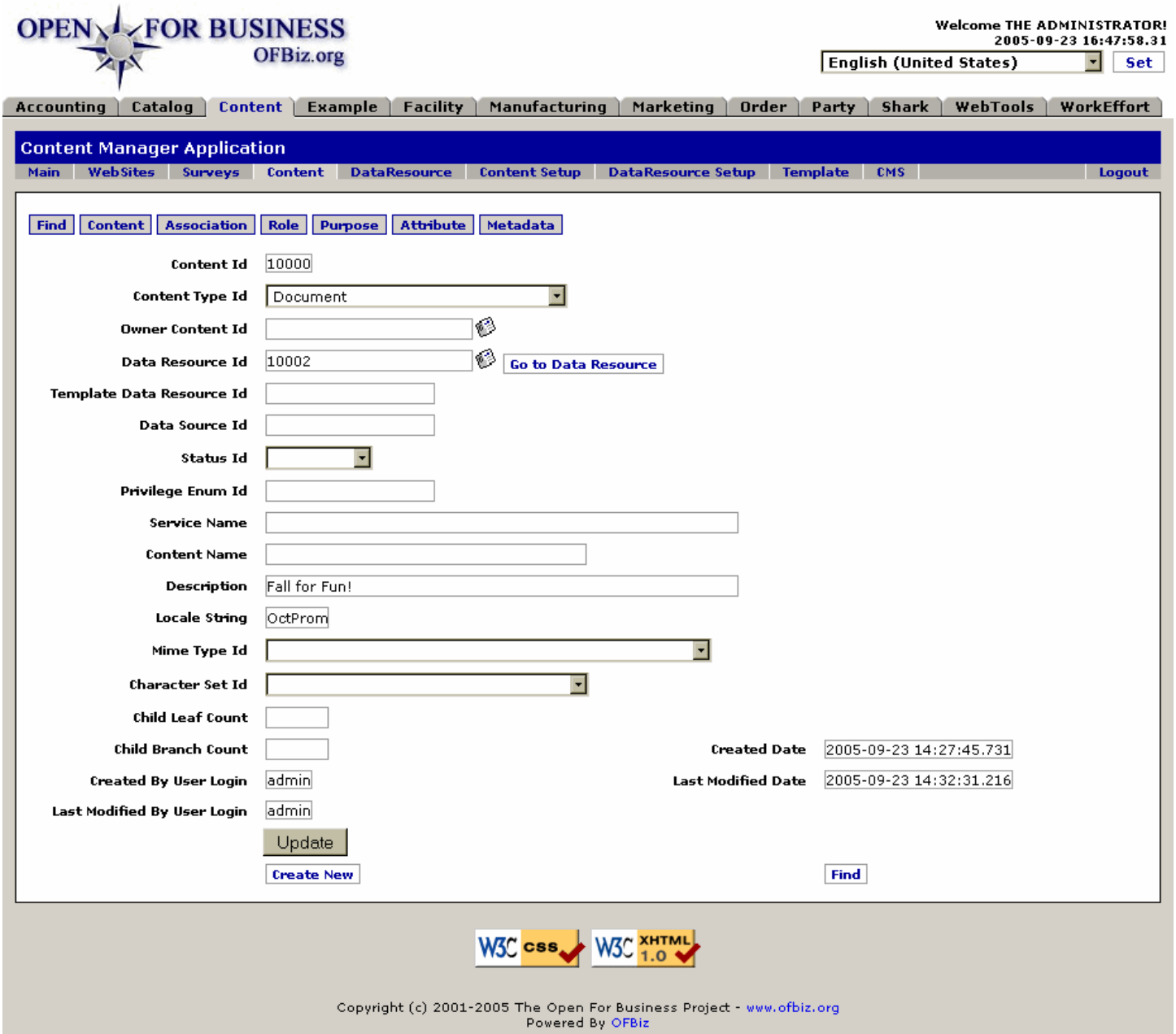
### .8.2.7.3 Discussion

The fields have already been discussed several times. <P> If you click on the [Content Page] link, you will open this Content within the Content Manager in another browser. There you have many other options to work with in developing your content.

### .8.2.7.4 Data fields

Unlabeled fields for labels and descriptions.

## .8.2.8 EditContent

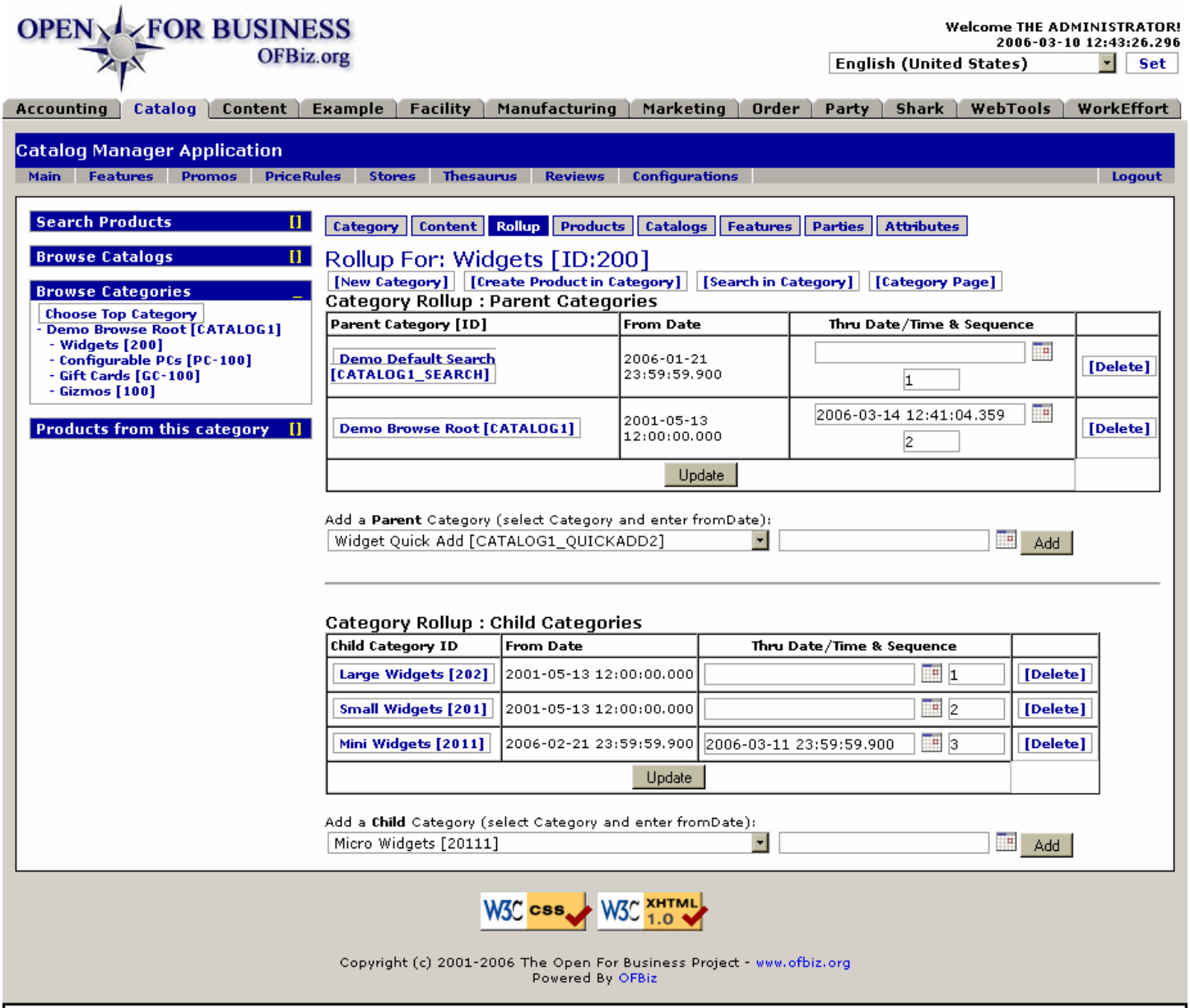



Opening screen for creating/editing Content; see the Content Manager for details.

## .8.3 Rollup

This screen is used to allocate the location of the category within the navigation. The category will appear in 'Parent' categories and will have 'child' categories in its navigation tree.

### .8.3.1 EditCategoryRollup




Rollup of category relationships: Parent to Child; Child to Parent. Associate, edit and schedule either of these here.

## .8.3.2 link buttons

[New Category] [Create Product in Category] [Search in Category] [Category Page] [Update] [Delete] [Add]<B> [Category] [Content] [Rollup] [Products] [Catalogs] [Features] [Parties] [Attributes]</B>

## .8.3.3 Category Rollup: Parent Categories

### .8.3.3.1 Parent Category ID

You can assign a Parent Category into this column using the Tool to Add a Parent Category, discussed below. <P>This link to the category update screen takes you to EditCategory.

### .8.3.3.2 From Date

Date the assignment to the Parent was effective.

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

Date the relationship will expire. Use the popup calendar to edit this date.

#### .8.3.3.4 Sequence

If more than one, this number will indicate sequencing.

#### .8.3.3.5 Tool to Add a Parent Category

##### .8.3.3.5.1 Select category (drop-down box)

This is the selection of the Parent category for the established category you are working with. <br> NOTE: Just because a Category appears in the drop-down list does not a logical choice for a Parent. Consider true relationships when making assignments.

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

The default date will be the time when the assignment is made. If you wish, enter another date.

### .8.3.4 Category Rollup: Child Categories

Provides a link to the category update screen called EditCategory.

#### .8.3.4.1 Child Category ID

You can insert a Child Category to this column using the Tool to Add a Child Category, discussed below.

#### .8.3.4.2 From Date

The date when the relationship was created or made effective.

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

Date the relationship will expire, if any. Use the popup calendar to enter.

#### .8.3.4.4 Sequence

If more than one, this number indicates the sequencing of relationships.

#### .8.3.4.5 Tool to Add a Child Category

##### .8.3.4.5.1 Select category (drop-down box)

Confirm that the Category you want to be the Parent is the active Category on the screen before you select a Child from the drop-down list of Categories.

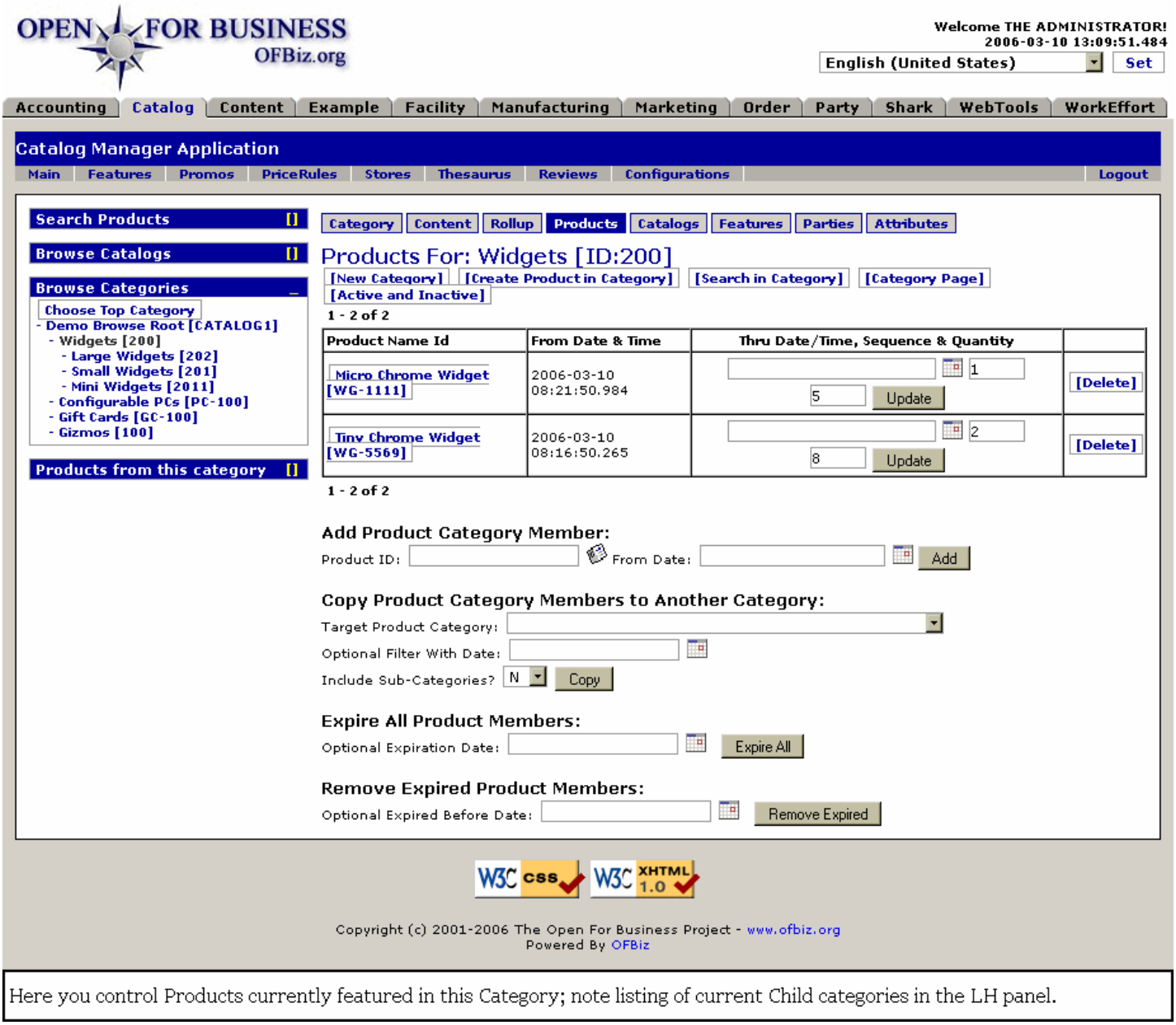
##### .8.3.4.5.2 From Date (popup calendar)

The current date and time are entered by default. Select a different date and time if you need to.

## .8.4 Products

This contains the list of products that will be displayed in the category. Other products may be displayed in sub categories but the products that are to appear on the page will go here. Products can appear more than once in categories.

### .8.4.1 EditCategoryProducts




Here you control Products currently featured in this Category; note listing of current Child categories in the LH panel.

## .8.4.2 link buttons

[New Category] [Create Product in Category] [Search in Category] [Category Page] [Active and Inactive] [Update] [Delete] [Add] [Copy] [Expire All] [Remove Expired] <B> [Category] [Content] [Rollup] [Products] [Catalogs] [Features] [Parties] [Attributes] </B>

## .8.4.3 Table of Products for this Category

### .8.4.3.1 Product Name ID

Clicking on the Product Name ID takes you to the Catalog >> Product >> edit product page (EditProduct).

### .8.4.3.2 From Date and Time

Date and Time when this item was included in this Category.

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

If needed, Date and Time when the presence of this Item in this Category will expire. Use the popup calendar to

edit this field.

#### .8.4.3.4 Sequence

Optional sequence number for rotation of items through a sequence,

#### .8.4.3.5 Quantity

If there is a limitation for this Promotion or a stock limitation, the Quantity available will be shown here.

### .8.4.4 Add Product Category Member

#### .8.4.4.1 Product ID

Use the popup search tool to locate if not sure of the ID.

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

Will default to the current date and time. Enter a different date if the effective date is not the same as the current.

### .8.4.5 Copy Product Category Members to Another Category

#### .8.4.5.1 Target Product Category (drop-down box)

If you want the products in this category to also be part of another established category, select that Product Category from this drop-down box.

#### .8.4.5.2 Optional Filter with Date (popup calendar)

If you have a filter system to use, enter the ID here along with the date you wish it to be effective from.

#### .8.4.5.3 Include Sub-Categories? (Y/N)

Some categories are also parent categories. Do you want the assignment of these products to also be included in the target Category's sub-categories? If Yes, select Y, else N.

### .8.4.6 Expire All Product Members

If you click on this Link, all the Products currently assigned will be Expired, clearing out the current list. Use with care!!

#### .8.4.6.1 Optional Expiration Date (popup calendar)

If you do want all the Product Members of this Category to expire but not yet, indicate the future date upon which that should occur. Note that you can use the popup calendar and then manually adjust the time entered.

### .8.4.7 Remove Expired Product Members

Expired does not mean removed. To remove the expired members, click on the link.

#### .8.4.7.1 Optional Expired Before Date (popup calendar)

Perhaps you want to remove those Products which expired the first of the month, but retain those which expired later. Maybe you need to retain them as expired so that Sales of those items can be confirmed at the promotional price. <P> Use this popup calendar to specify the cutoff point: those which expired before this date will be removed, but any which expired after the selected Date and Time will remain.

## .8.5 Catalogs

As a minimum you will need to add a browse root and a promotions category. The browse root forms the 'top level' of the site and this is what the other categories that you create will 'hang' off. The promotions category is for special offers and is the front page of a site by default. There are other categories available which can be used for specialist functions like Search, etc. So the catalog is assigned a category, categories are assigned to a catalog with a 'type' of assignment, ie , browse root, promotions, etc. In addition you will want to add your own categories to represent different 'Departments' in the store, 'grouping' of concepts, etc.

### .8.5.1 EditCategoryProdCatalogs

id:[DOCCAT1332] image:

Catalogs and the Type of catalog usage are added, scheduled, or deleted from this screen.

### .8.5.2 link buttons

[New Category] [Create Product in Category] [Search in Category] [Category Page] [Update] [Delete] [Add] <B> [Category] [Content] [Rollup] [Products] [Catalogs] [Features] [Parties] [Attributes] </B>

### .8.5.3 Table of Catalogs

#### .8.5.3.1 Catalog Name ID

Clicking on the ID takes you to the EditProdCatalog screen.

#### .8.5.3.2 Type

This is the Type of relationship this Catalog has with the selected Product or Category.

#### .8.5.3.3 From Date and Time

When the association was created or made active.

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

When (if) the association will expire. Use the popup calendar to enter or change the Date and Time.

#### .8.5.3.5 Sequence

Optional sequencing number.

### .8.5.4 Add Catalog to Product Category

#### .8.5.4.1 Catalog (drop-down box)

Select from the drop-down box.

#### .8.5.4.2 Type (drop-down box)

Type of relationship between the catalog and this category.

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

Optional date if to be different than the current date which will default.

## .8.6 Features

### .8.6.1 EditCategoryFeatureCats

id:[DOCCAT1346] image:

Associate Feature Groups and Feature Categories with the selected Category. Also may delete or schedule here.

### .8.6.2 link buttons

[New Category] [Create Product in Category] [Search in Category] [Category Page] [Attach Features to Category from Products] [Add] [Update] [Delete]<B> [Category] [Content] [Rollup] [Products] [Catalogs] [Features] [Parties] [Attributes] </B>

## .8.6.3 Table of Feature Groups

### .8.6.3.1 Feature Group

Click on this and you are taken to the Catalog Manager > Features tab > Feature Groups sub-tab to edit the Feature Group.

### .8.6.3.2 From Date and Time

Date and time this Feature Group was attached.

### .8.6.3.3 Thru Date and Time (popup calendar)

When the association of this Feature Group with this Catalog will expire. Use the popup calendar to insert or change the date and time.

## .8.6.4 Apply Feature Group to Product Category

### .8.6.4.1 Feature Groups (drop-down box)

Select a Feature Group from the drop-down box, select a date and time for it to be effective (defaults to now if nothing entered), and click on the [Add] link. <P> This method will attach the Feature Groups one at a time. To do all of the Groups at the same time, use the [Attach Features to Category from Products] link above the table.

### .8.6.4.2 From Date and Time (popup calendar)

To enter an effectivity date and time other than the present.

## .8.6.5 Table of Feature Categories

### .8.6.5.1 Feature Category

Click on the Feature Category ID and you are taken to the Catalog Manager > Features tab > Feature Category screen to view and edit this Category.

### .8.6.5.2 From Date and Time

When the Feature Category was associated or became effective.

### .8.6.5.3 Thru Date and Time (popup calendar)

Expiration date and time for this association. Use the popup calendar to enter or change the expiration.

## .8.6.6 Apply Feature Category to Product Category

### .8.6.6.1 Feature Category (drop-down box)

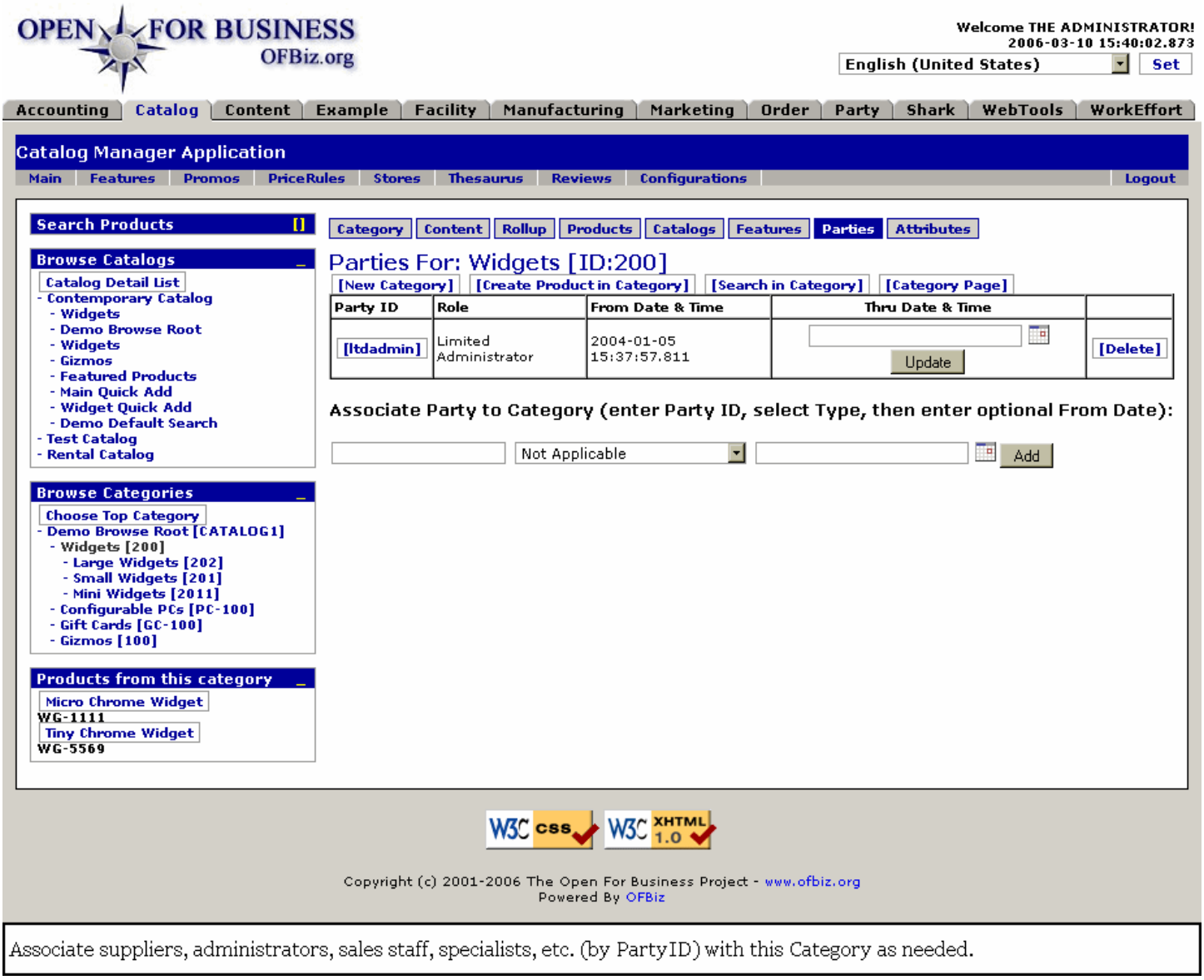
Select a Feature Category from the drop-down box.

### .8.6.6.2 From Date (popup calendar)

Enter a date and time for future effectivity. Leave blank and it will populate for the present time when the Feature Category is added.

# .8.7 Parties

## .8.7.1 EditCategoryParties




Associate suppliers, administrators, sales staff, specialists, etc. (by PartyID) with this Category as needed.

## .8.7.2 link buttons

[New Category] [Create Product in Category] [Search in Category] [Category Page] [Update] [Delete] [Add] <B> [Category] [Content] [Rollup] [Products] [Catalogs] [Features] [Parties] [Attributes] </B>

## .8.7.3 Table of Party IDs

This table contains a listing of those Parties associated with the Category. Use the Party Manager to specify the Party ID or to create any parties which should be associated but which have not yet been created.

### .8.7.3.1 Party ID

Click on the Party ID and you are taken to the Party manager.

### .8.7.3.2 Role

What role does this Party play?

### .8.7.3.3 From Date and Time

Date and time of the assignment.

#### .8.7.3.4 Thru Date and Time (popup calendar)

If the role is to expire, enter the date and time with the popup calendar.

### .8.7.4 Associate Party to Category

#### .8.7.4.1 Party ID

There is no drop-down or popup search tool at this time. Enter the correct Party ID for this to function.

#### .8.7.4.2 Type (drop-down box)

Select from the drop-down box.

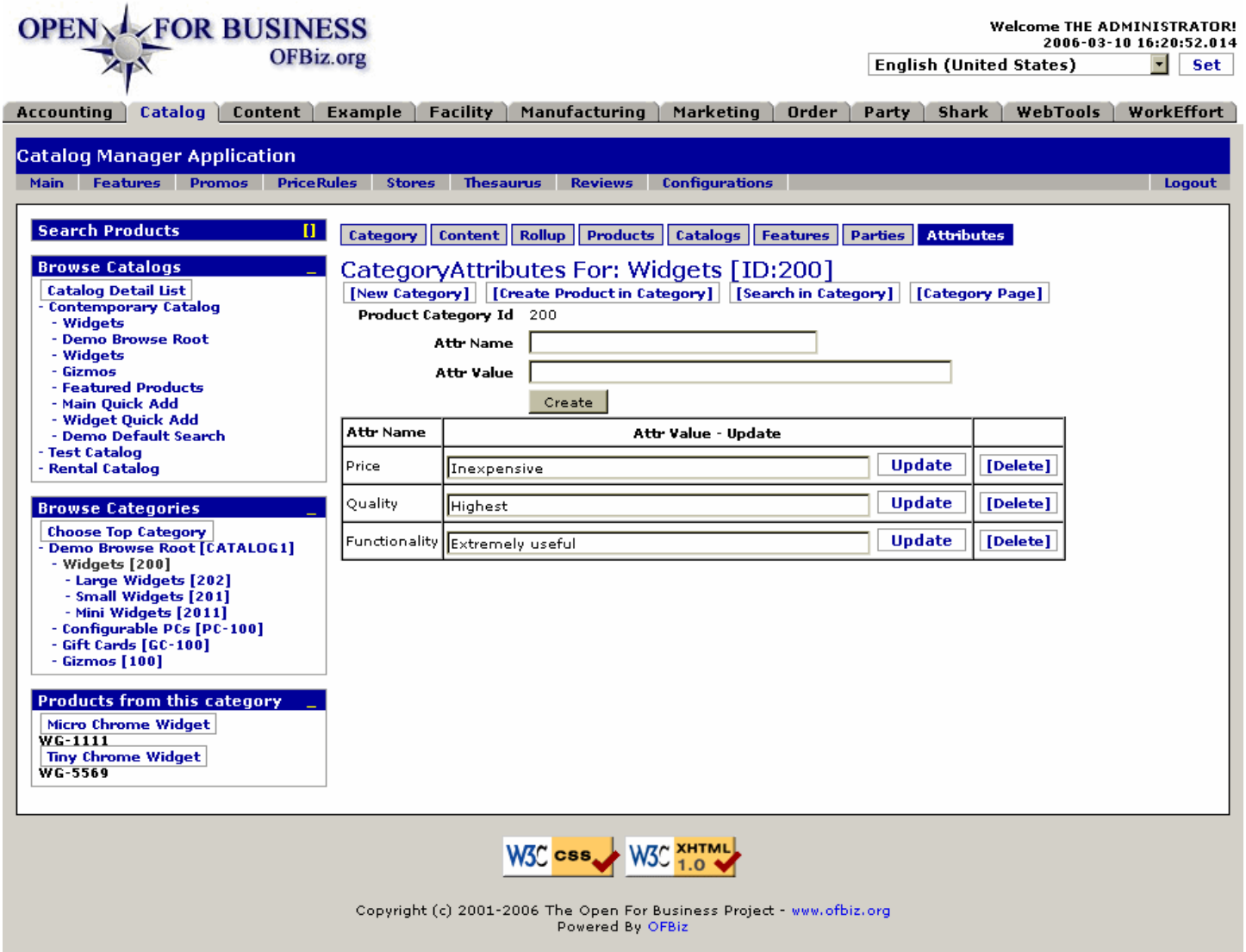
#### .8.7.4.3 From Date (popup calendar)

(Optional) Enter the date when the assignment will become effective. If left blank, defaults to now.

## .8.8 Attributes

### .8.8.1 EditCategoryAttributes

id:[13211] image:




Assign and edit the attributes for this Category of products with this screen.

## .8.8.2 link buttons

[New Category] [Create Product in Category] [Search in Category] [Category Page] [Update] [Delete] [Create] <B> [Category] [Content] [Rollup] [Products] [Catalogs] [Features] [Parties] [Attributes] </B>

## .8.8.3 Tool to create attributes

### .8.8.3.1 Product Category ID

Cannot be changed. Is given here to confirm that this is the Product Category to which you wish to assign attributes.

### .8.8.3.2 Attr Name

Create your own name for the attribute and enter it here.

### .8.8.3.3 Attr Value

Enter words to describe this Attribute in relation to the Product Category.

## .8.8.4 Table of Attributes

### .8.8.4.1 Attr Name

The name you gave to this Attribute.

### .8.8.4.2 Attr Value

How the Attribute describes the Product Category.

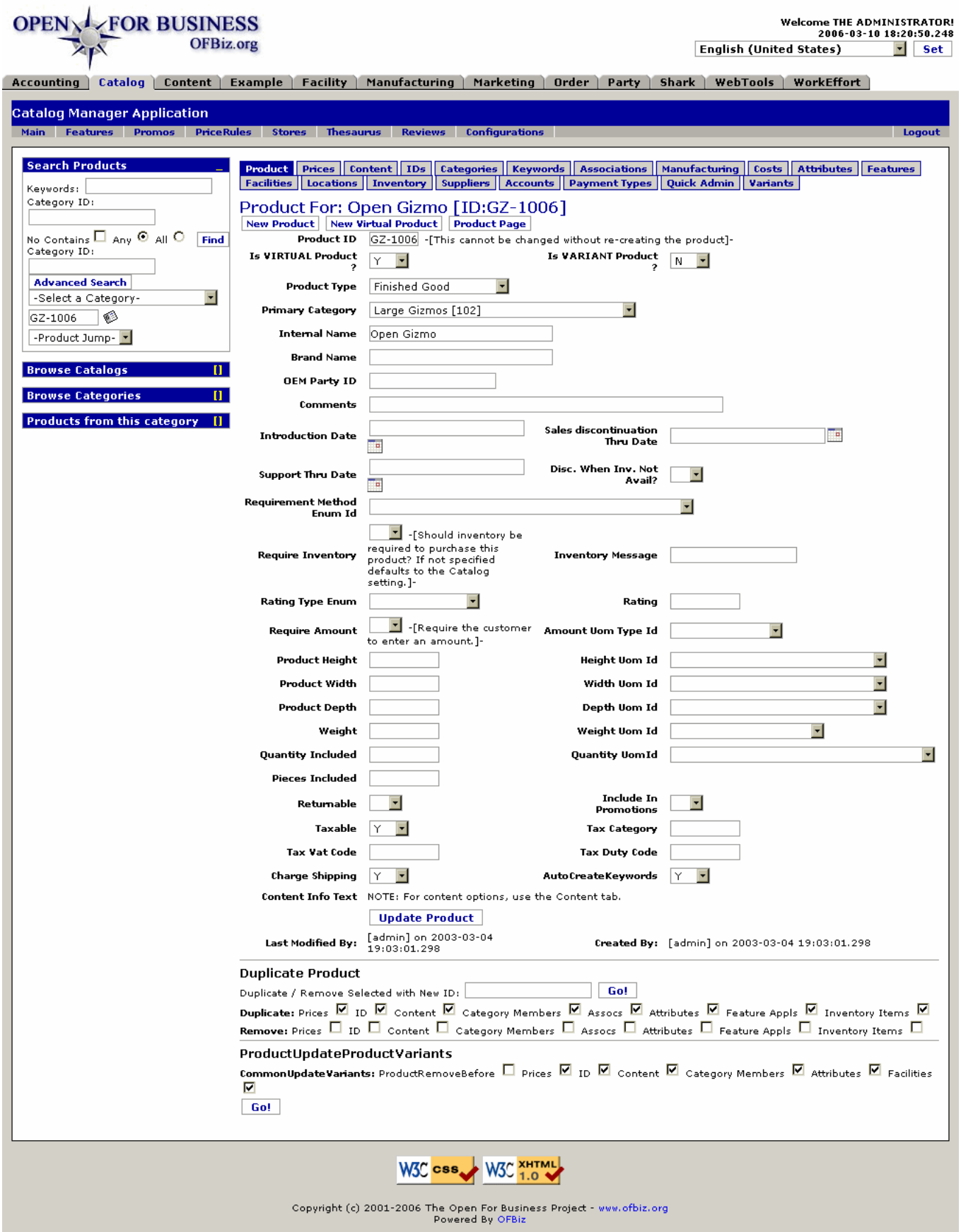
# .9 Product - new Product or edit

## .9.1 Discussion

This is the first tab in the product catalog editing process. Click on [New Product] to create a new item. [Product Page] jumps you into the e-commerce application to the specific page for this product. These actions are presented on each of the EditProduct screens. <p> The tabs following Product (Prices, Content, IDs, etc.) will be seen when you select to Edit an existing product or after pressing Update when creating a new product. Not all of these tabs will appear all of the time. For example, Variants will only appear when you are working with a Virtual product. Configurations will only appear with a configurable product.<p> Once the product has been updated you will need to visit both the 'Content' tab (to update images or update the freemarker template) and the 'Categories' tab where you will specify the categories that you want the product to appear in. In order to make it appear in the category then it must be added in the 'Categories' tab at the top.

## .9.2 Product

### .9.2.1 EditProduct




Click on [Update Product] after an Edit or creating a New Product; the Product is administered here for the Catalog.

## .9.2.2 link buttons

[Update Product] [Go!] [New Product] [New Virtual Product] [Product Page] <B> [Product] [Prices] [Content] [IDs] [Categories] [Keywords] [Associations] [Manufacturing] [Costs] [Attributes] [Features] [Facilities] [Locations] [Inventory] [Suppliers] [Accounts] [Payment Types] [Quick Admin] [Variants] [Configurations] </B>

## .9.2.3 Product ID

This will be the method for identifying the product used by your company. Our standard way of identifying products is to use a mnemonic to identify the supplier and then their code is added to the end of this to create a unique ID. Variants generally have a hyphenated extension at the end: GZ-1006-1, -2, etc. <P> This ID cannot be changed without re-creating the product.

## .9.2.4 Is VIRTUAL Product? (Y/N)

These are for items that may be available in a variety of sizes, colors, etc., Ordinary products will be set to NO. A Virtual product could be 321 Shirt; by specifying size and color during the ordering process the customer would arrive at his actual product of a Blue Shirt, type 321, size XL Male., for example.

### .9.2.4.1 Virtual products with Variants

If you have products that come in different sizes, colors, etc., you will need to use the 'virtual product' and create 'variants' based on this. To do this you create a base or 'virtual' product for say, a given type of shirt. Then for each color/size combination you create a variant. The reason for this is, when you track inventory, what you really sell is not a 'shirt' but rather a 'large, green shirt' So when in the 'Product' screen the 'Virtual product' only gets set to Y if this product comes in colors/sizes/etc.

## .9.2.5 Is VARIANT Product? (Y/N)

These could be the various varieties of the virtual product currently in stock. <P/> See topic Advanced Products, below, for more information.</P>

## .9.2.6 Product Type (drop-down box)

Needed for searches and appropriate handling by the system. Use the drop-down box to select. Types could include the following: <P><B> --- <br> Configurable Good <br> Digital Good <br> Finished Good <br> Digital/Finished Good <br> Fixed Asset Usage <br> Good <br> Raw Material <br> Service <br> Subassembly <br> Work in Process </B>

## .9.2.7 Primary Category (drop-down box)

Which Category will be the primary identifier of this type of product? This is one of the categories that have been created. You may also want to assign it to the Promotions category in due course if the product is to appear on the front page.

## .9.2.8 Internal Name

Name as known within the company.

## .9.2.9 Brand Name

Name by which it is marketed to customers; the holding company or principal company brand.

## .9.2.10 OEM Party ID

If product is not completely made by you, the Party ID of the source for the product (Other Equipment Manufacturer) is entered here.

## .9.2.11 Comments

These are internal comments, not for public showing.

## .9.2.12 Introduction Date (popup calendar)

The first date that the product will appear in the system.

## .9.2.13 Sales discontinuation Thru Date (popup calendar)

The last day that the product will be available on the system.

## .9.2.14 Support Thru Date (popup calendar)

How long the product might be supported after having been sold; applies to Warranty, Returns, Customer Service questions, etc.

## .9.2.15 Disc. When Inv. Not Avail? (Y/N)

If checked Yes, can offer the customer a discount for waiting until inventory is available for shipping.

## .9.2.16 Requirement Method Enum ID

Refers to warehouse stocking level triggers. The drop-down box might contain: <P><B> No Requirement Created <br> Automatic for Every Sales Order <br> When ATP Reaches Minimum Stock for Product-Facility <br> When QOH Reaches Minimum Stock for Product-Facility </B>

## .9.2.17 Require Inventory? (Y/N)

'Should inventory be required to purchase this product? If not specified defaults to the Catalog setting.' <P>We can override the catalog defaults for the Inventory setting using the 'Require Inventory' tab. This will override the catalog field (where this is also specified at a higher level) and, where this is set to 'yes' this will mean the product is not displayed when there is no stock available.

## .9.2.18 Inventory Message

This is the place where we set the message 'This product is out of stock and will require x days to order' This is also set from the Inventory Items tab off the 'Facility' section described in 'Inventory'.

## .9.2.19 Rating Type Enum (drop-down box)

Rating Type is selected from the drop-down box. Enum could be: <P><B> Min Rating<br> Max Rating<br> Rating Override</B>

## .9.2.20 Rating

State in relation to the Rating Type Enum (Max Rating, Min Rating, Rating Override, etc.).

## .9.2.21 Require Amount (Y/N)

'Require the Customer to enter an amount.' Also specify the Amount UOM Type if other than 'Each.'

## .9.2.22 Amount Uom Type ID (drop-down box)

Select from the drop-down box. Enter an item if the Amount is other than 'Each.'<BR> Choices include Area, Currency, Dry Volume, Energy, Length, Liquid Volume, Temperature, Weight, etc.

## .9.2.23 Product Height

When purchasing product that needs to fit within a certain space, dimensions are appreciated by the customer. Enter the item's Height here and specify the UOM, next.

## .9.2.24 Height Uom ID (drop-down box)

From the drop-down box, select the Unit of Measurement used in determing the Height.

## .9.2.25 Product Width

When purchasing product that needs to fit within a certain space, dimensions are appreciated by the customer. Enter the item's Width here and specify the UOM, next.

## .9.2.26 Width Uom ID (drop-down box)

From the drop-down box, select the Unit of Measurement used in determing the Width.

## .9.2.27 Product Depth

When purchasing product that needs to fit within a certain space, dimensions are appreciated by the customer. Enter the item's Depth (front to rear measurement) here and specify the UOM, next.

## .9.2.28 Depth Uom ID (drop-down box)

From the drop-down box, select the Unit of Measurement used in determing the Depth (front to rear measurement).

## .9.2.29 Weight

When purchasing product that needs to be shipped or hefted about, knowing its weight is appreciated by the customer. Enter the item's Weight here and specify the UOM, next.

## .9.2.30 Weight Uom ID (drop-down box)

Specifies the weight unit of measure. For example kilogram or pound. It is not a required field and can be omitted. It can be used for calculating shipping when this is based on weight.

## .9.2.31 Quantity Included

Any given product ID could include any number of specific identical items. For example, if this product were cans of baby formula, packaged to ship 4 in a container, the unit here would be 4.

## .9.2.32 Quantity Uom ID (drop-down box)

If the Quantity is Each, you will leave this blank. This drop-down box specifies more esoteric units of measure such as Watt, Liter, Ounce, Yard, Mole, Ansgstrom, etc.

## .9.2.33 Pieces Included

If the complete package includes (for example) 7 different pieces which fit together or collectively comprise the Product, indicate 7 as the number of Pieces. This is different from Quantity Included which refers to the number of identical Pieces comprising an Item Product ID for shipping and handling purposes.

## .9.2.34 Returnable? (Y/N)

If not satisfied with this Product, will the customer be allowed to return it?

## .9.2.35 Include In Promotions? (Y/N)

Would this Product be interesting enough to describe it in Promotions?

## .9.2.36 Taxable? (Y/N)

This requires an evaluation of the item under the tax law. Is it subject to taxes at the time of transfer or is it not?

## .9.2.37 Tax Category

There are many types of tax Categories: Luxury Tax, Sales Tax, Property Tax, Use Tax, Tobacco Tax, Fuel Tax, Transportation Tax, Tourist Tax, etc. If the Product (or Service) is subject to any of these, specify here.

## .9.2.38 Tax Vat Code

Which Value Added Tax code does this fit under?

## .9.2.39 Tax Duty Code

A separate table needs exist which maintains the tax rates for separate geographical/governmental areas. The tax category would pull out the appropriate tax rating for that area.

## .9.2.40 Charge Shipping? (Y/N)

Data products, such as e-books or programs downloaded across the internet, could not generate shipping charges. Promotional pricing might include 'free shipping' which would override this setting. If you intend to charge for the shipping expense, however, this should be set to Yes.

## .9.2.41 AutoCreate Keywords? (Y/N)

If this is selected then the contents of the long description will be used to populate the products keywords. This means that when someone searches on any of these keywords then the product will be displayed. This functionality is also available in the 'Keywords' tab which is available after the product has been added using the 'Update' button.

## .9.2.42 Content Info Text

Appears here for informational purposes only. 'NOTE: For content options, use the Content tab.'

## .9.2.43 Last Modified By

Which Party last made changes to the content on this screen and when did they do that?

## .9.2.44 Created By

Which Party initiated this Product sheet and when did they do it?

## .9.2.45 Duplicate Product

<B>Duplicate / Remove Selected With New ID. </B><br> Enter the New ID, check the appropriate boxes below, then click on the [Go!] link. If you want these aspects of the existing Product to be carried forward into the new Product, check them after the 'Duplicate:' label. If you want the Product to be duplicated without carrying them forward, check the appropriate boxes after the 'Remove:' label.

## .9.2.46 ProductUpdateProductVariants

Enter checks in the boxes to be included in the Variants, then press the link [Go!].<p> CommonUpdateVariants:<B> <br> ProductRemoveBefore<br> Prices<br> ID<br> Content<br> Category Members<br>Attributes<br>Facilities</B>

## .9.2.47 Advanced Products

### .9.2.47.1 Introduction

#### .9.2.47.1.1 Feature Categories

The next stage is to add features which is what you use for colors and sizes. To do this the 'FeatureCats' section is used. We start by creating a feature category, then add features to it. The ID code isn't needed to be unique by default and you don't have to use it.

### .9.2.47.2 More processes

#### .9.2.47.2.1 Apply features

Apply the features to the product, i.e., what colors does this shirt come in?

#### .9.2.47.2.2 Create variants

Create a variant for each combination.

#### .9.2.47.2.3 Create inventory

Create inventory for each variant.

### .9.2.47.3 Explanation

#### .9.2.47.3.1 Edit features screen

You use the 'edit features' (caution: this screen can be confusing and it is worth spending some time familiarising yourself with this) screen to apply features to a product, and each application of a feature has a given type. For a base or 'virtual' product, you will apply a feature as type 'Selectable'. This gives the end user the ability to choose between selections, i.e., a drop down will appear for each selectable feature type, listing all selectable features of each type.

#### .9.2.47.3.2 Examples

For example, if we apply features of the Color feature type that means there will be one drop-down labeled 'Color'. If we applied features of feature type 'Size' there would also be a drop down for Size. This screen is a bit awkward because it takes you back to the other screen each time you apply a feature. Once we've done the features we need to do the variant. This part is easier. In the Quick Add Variants screen it will automatically create our variant products so you put your product id that you want it to have and click create. So if we had 3 sizes too, there would be a total of 6 variants... 2 colors * 3 sizes = 6 combinations.

#### .9.2.47.3.3 Virtual N, Variant Y

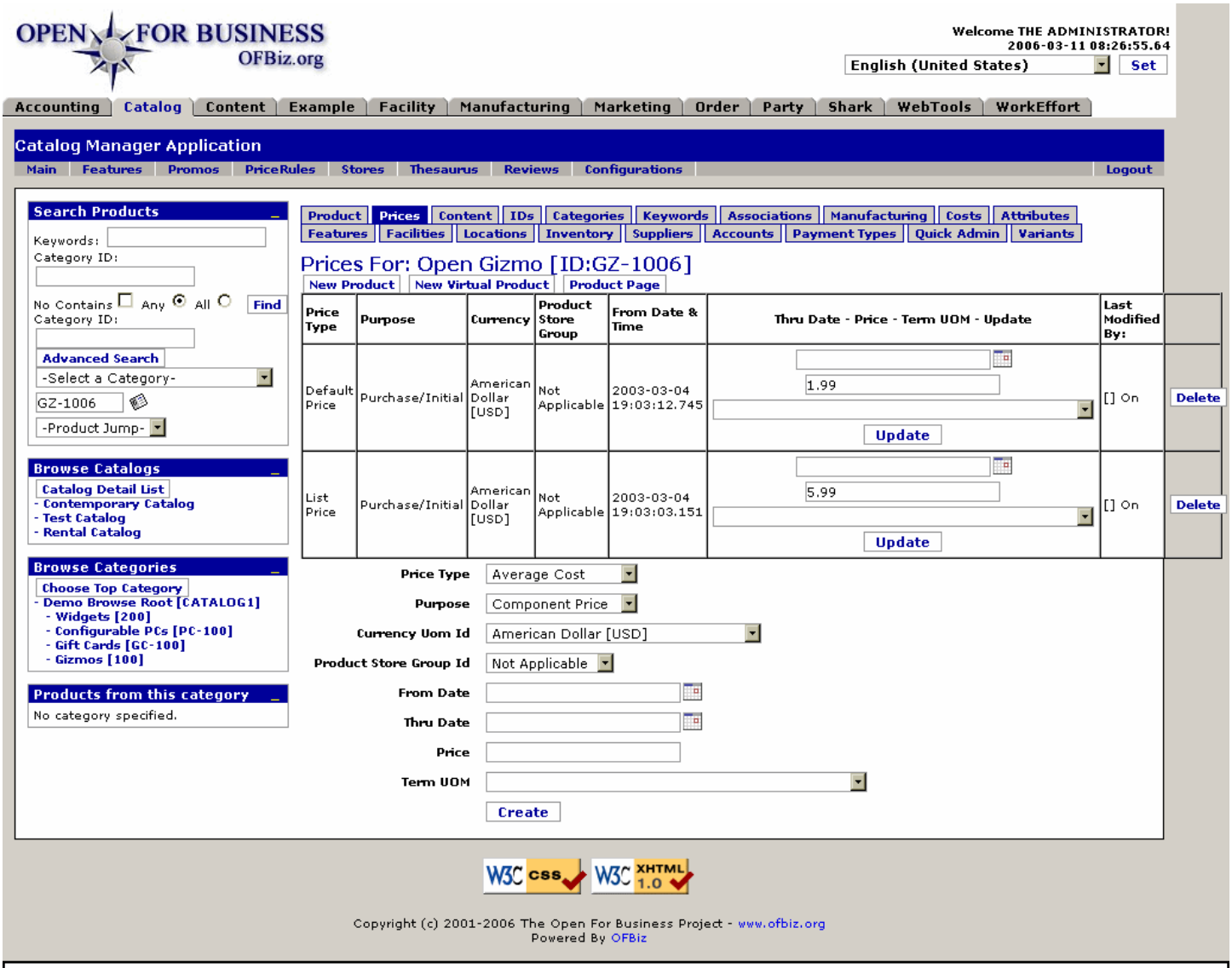
This is really just a product but we see it has virtual set to N and variant set to Y. So it has now generated a finished good with the characteristics we specified. So when we look at the features, we see there is one feature applied, but now the application type is 'Standard.' Before that it was selectable on the base product.

#### .9.2.47.3.4 Sell Variant, not Product

Features on a variant product denote what 'kind' of test shirt it is as in, a red one or a blue one. NOTE: You must add inventory to the variant and not the base product. This is because you are selling the variant and not the base product.

## .9.3 Prices

### .9.3.1 EditProductPrices




At this Price screen you can change a Price, create a new Price, or delete an obsolete one. Many OFBiz processes are based upon these prices.

## .9.3.2 link buttons

[Update] [Create] [Delete] [New Product] [New Virtual Product] [Product Page] <B> [Product] [Prices] [Content] [IDs] [Categories] [Keywords] [Associations] [Manufacturing] [Costs] [Attributes] [Features] [Facilities] [Locations] [Inventory] [Suppliers] [Accounts] [Payment Types] [Quick Admin] [Variants] [Configurations] </B>

## .9.3.3 General discussion of prices

### .9.3.3.1 Required prices

There are several different types of prices. The only REQUIRED ones are List Price and Default Price. So you should have a price at which it is bought and a price at which it is sold. List price can be used as Suggested Retail price and Default price would be the price which you will sell it for (by default).

### .9.3.3.2 Average Cost and other prices

Average Cost would reference how much you paid for the product since you could pay different amounts for the item, depending on when you purchased, from whom you purchased or how many you purchased at the time. This field references the average amount the item cost. In the future this may be generated based on purchase orders, etc. But that will be a while. Currently I do not believe Recurring Charge and Usage Charge do anything at all. They are there for future use. That leaves max, min and promo price.

#### .9.3.3.2.1 Max price

Max price is the MOST you will ever sell this product for. When we get into Price Rules you can see that all sorts of adjustments can be made to the price, so this acts as a failsafe.

#### .9.3.3.2.2 Min price

Min price is set the same way as Max, but it makes sure you never sell the product for less then what you set. If max price is ever less then min price, min price will take priority.

### .9.3.3.3 Price Unit of Measure

There are 3 fields on the Product that are used to describe Price Unit of Measure (UOM). They are Quantity Included, Quantity Uom ID, and Pieces Included. The price of the product is for the given quantity and number of pieces. <P> For example, a 6-pack of 12 ounce soda cans would have Quantity Included = 12, Quantity Uom ID is ounces, and Pieces Included = 6. If there is just one of something, the Pieces Included can be left blank as that implies a single piece. <P> The Term Uom Id on the price screen has nothing to do with this. That is used only when the price purpose would require this extra information. The UOMs included there might, therefore, not make sense for all circumstances, and in most cases this field would be left empty. <P> An example of Term Uom Id is a recurring price that is charged monthly: the Term Uom would be 'Time/Frequency: Time in Months'. Another example is a usage charge per kilobyte transferred, with the corresponding term used to further describe the price.

## .9.3.4 Table of assigned prices

### .9.3.4.1 Price Type

How the Application uses the Price is partly constrained by the term found here. The Type will be one of the following: <B><P> Average Cost <br> Competitive Price <br> Default Price <br> List Price <br> Maximum Price <br> Minimum Price <br> Promotional Price <br> Wholesale Price</B>

### .9.3.4.2 Purpose

For what purpose was this price established?

### .9.3.4.3 Currency

The national currency in which the Price is expressed.

### .9.3.4.4 Product Store Group

If you have different Product Store Groups set up, the Price might vary between them. This is where the specific Product Store Group limitation would be indicated.

### .9.3.4.5 From Date and Time

When the Price was established or scheduled to be applied.

### .9.3.4.6 Thru Date (popup calendar)

If the Price will expire at a particular date and time, that is indicated here. Use the popup calendar and the [Update] link to change the Thru date for this pricing.

### .9.3.4.7 Price

The established Price can be modified here within this table. Click [Update] after any changes are made.

### .9.3.4.8 Term UOM (drop-down box)

Can change the Unit of Measure here; use the drop-down box. If UOM is 'Each' or some term not listed, do not assign a UOM.

### .9.3.4.9 Last Modified by - On

Who changed the Price or its terms and when that change was done.

## .9.3.5 Tool to assign prices

#### .9.3.5.1 Price Type (drop-down box)

Select one of the following from the drop-down box: <B><P> Average Cost <br> Competitive Price <br> Default Price <br> List Price <br> Maximum Price <br> Minimum Price <br> Promotional Price <br> Wholesale Price</B>

#### .9.3.5.2 Purpose

For what purpose is this Price being established? Select one of the following from the drop-down box:<B> <P> Component Price <br> Purchase/Initial <br> Recurring Charge <br> Usage Charge</B>

#### .9.3.5.3 Currency Uom ID (drop-down box)

In which national Currency is the price expressed?

#### .9.3.5.4 Product Store Group ID (drop-down box)

If you have different Product Store Groups set up, the Price might vary between them. This is where the specific Product Store Group limitation would be indicated.

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

Defaults to now. When the price will not be effective until a later date and time, or if you are documenting an earlier price assignment, enter that date here.

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

If the Price will expire at a specific date in the future, use the popup calendar to identify that date here.

#### .9.3.5.7 Price

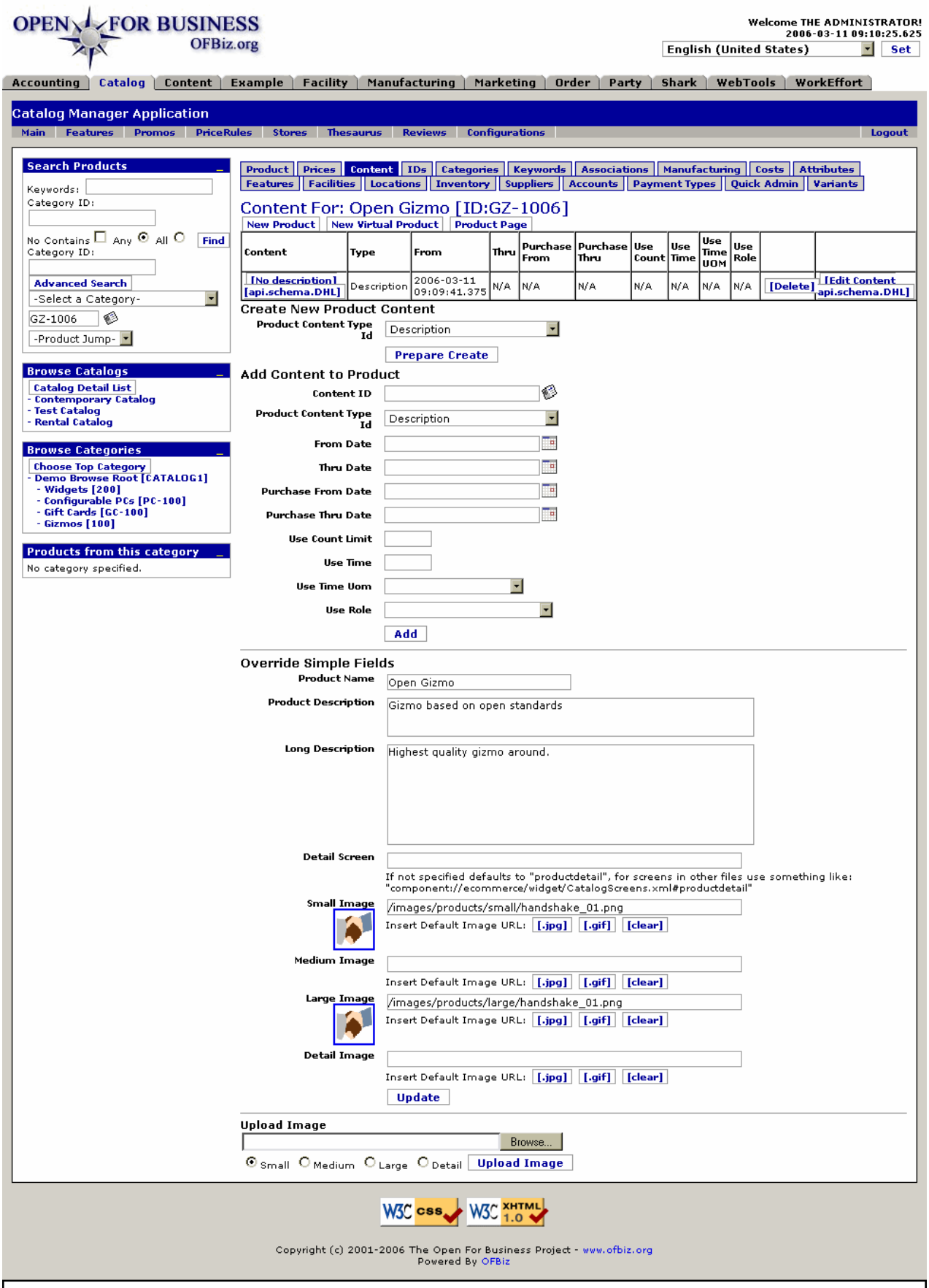
This is THE price which will be reported in its relationship with Type: List Price, Default Price, Average Cost, etc.

#### .9.3.5.8 Term UOM

Price is always specified for a particular term: so much per gallon, per dozen, each, per acre, etc. If the term is obvious, such as Each, just leave this Term blank. You might need to find a specific term, however, so try to find it in the drop-down list.

## .9.4 Content

### .9.4.1 EditProductContent




Initial edit screen for catalog Content associated with this Product. [Edit Content] takes you to the Content Manager for refinements.

## .9.4.2 link buttons

[Delete] [Edit Content ...] [Prepare Create] [Add] [.jpg] [.gif] [clear] [Update] [Browse] [Upload Image] [New Product] [New Virtual Product] [Product Page] <B> [Product] [Prices] [Content] [IDs] [Categories] [Keywords] [Associations] [Manufacturing] [Costs] [Attributes] [Features] [Facilities] [Locations] [Inventory] [Suppliers] [Accounts] [Payment Types] [Quick Admin] [Variants] [Configurations] </B>

## .9.4.3 Table of Current Content

### .9.4.3.1 Content

Gives you the Short Description and the Content ID. Click on that to go to the EditProductContentContent screen in the Catalog manager to make high-level changes. For detailed work on the Content, go to the far right column and click on the [Edit Content] link which takes you to the Content Manager with this Content.

### .9.4.3.2 Type

What kind of content is this?

### .9.4.3.3 From

What is the effective Date for the Content?

### .9.4.3.4 Thru

When does the effectivity of this Content for this Product expire?

### .9.4.3.5 Purchase From

This Content is effective for this Product for purchases from what date and time forward?

### .9.4.3.6 Purchase Thru

This Content is effective for this Product for purchases until what date and time?

### .9.4.3.7 Use Count

How many times may this item be used?

### .9.4.3.8 Use Time

For what period of time may the content be used?

### .9.4.3.9 Use Time UOM

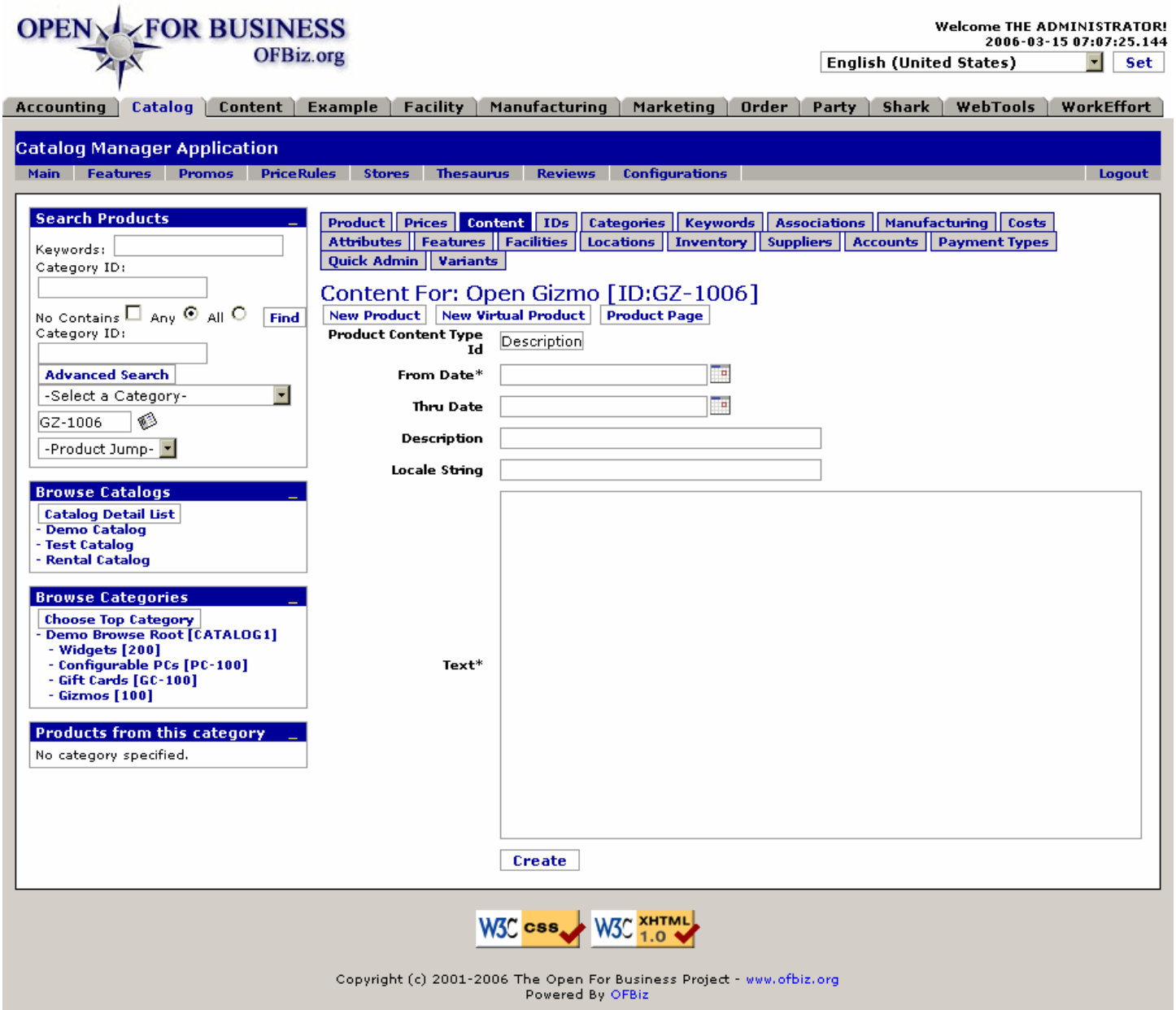
Will the periods of use time be measured in seconds, minutes, days, years?

### .9.4.3.10 Use Role

What will be the Role of the Party using this Content?

## .9.4.4 Create new Product Content

### .9.4.4.1 prepareAddContentToProduct




A click on [Prepare Create] with "Description" selected brings up this creation screen. Type determines which screen presented.

## .9.4.4.2 link buttons

[Create] [New Product] [New Virtual Product] [Product Page] <B> [Product] [Prices] [Content] [IDs] [Categories] [Keywords] [Associations] [Manufacturing] [Costs] [Attributes] [Features] [Facilities] [Locations] [Inventory] [Suppliers] [Accounts] [Payment Types] [Quick Admin] [Variants] [Configurations] </B>

## .9.4.4.3 Product Content Type ID (drop-down box)

Select the Type from among the following; then click on [Prepare Create]. The screen presented will be determined by the Type selected. <B><P> Description <br> Description - Long <br> Digital Download <br> Directions <br> Fulfillment Email <br> Fulfillment External (Async) <br> Fulfillment External (Sync) <br> Image - Detail <br> Image - Large <br> Image - Medium <br> Image - Small <br> Ingredients <br> Online Access <br> Product Name <br> Special Instructions <br> Unique Ingredients <br> Warnings</B>

## .9.4.4.4 Details vary

Details for inclusion dependent upon Type ID selected.

#### .9.4.4.5 When editing ...

Selection of existing Content ID for editing brings up similar screen with existing content populated.

### .9.4.5 Add Content to Product

#### .9.4.5.1 Content ID

Must be existing Content. Use the popup search tool to locate Content ID.

#### .9.4.5.2 Product Content Type ID (drop-down box)

Use the drop-down box to select from one of the following: <B> <P> Description <br> Description - Long <br> Digital Downloads <br> Directions <br> Fulfillment Email <br> Fulfillment External (Async) <br> Fulfillment External (Sync) <br> Image - Detail <br> Image - Large <br> Image - Medium <br> Image - Small <br> Ingredients <br> Online Access <br> Product Name <br> Special Instructions <br> Unique Ingredients <br> Warnings</B>

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

Date the assignment is effective.

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

Date the assignment expires.

#### .9.4.5.5 Purchase From Date (popup calendar)

Effective with purchase from which date.

#### .9.4.5.6 Purchase Thru Date (popup calendar)

Not valid for purchases after this date.

#### .9.4.5.7 Use Count Limit

The maximum number of uses.

#### .9.4.5.8 Use Time

The maximum period of time it can be used.

#### .9.4.5.9 Use Time UOM (drop-down box)

Use time is expressed in these units of time.

#### .9.4.5.10 Use Role

What is the Role of the Party using this Content.

### .9.4.6 Override Simple Fields

#### .9.4.6.1 Product Name

What the Product is called. This datapage is already associated with the selected Product ID.

#### .9.4.6.2 Product Description

Should be a short descriptive phrase.

#### .9.4.6.3 Long Description

This is your long narrative, describing or defining.

#### .9.4.6.4 Detail Screen

If not specified defaults to 'productdetail', for screens in other files use something like:

'component://ecommerce/widget/CatalogScreens.xml# productdetail'

#### .9.4.6.5 Small Image

Displays currently-loaded small-sized image to the left. <br> Different sized images may be called out for different positions in the Catalog content. If available it is good to have each of these 4 types loaded. <P> Insert Default Image URL, then click on the type to upload, either [.jpg] or [.gif]. Click on the link [clear] to remove the current graphic without replacement.

#### .9.4.6.6 Medium Image

Displays currently-loaded medium-sized image to the left. <br> Different sized images may be called out for different positions in the Catalog content. If available it is good to have each of these 4 types loaded. <P> Insert Default Image URL, then click on the type to upload, either [.jpg] or [.gif]. Click on the link [clear] to remove the current graphic without replacement.

#### .9.4.6.7 Large Image

Displays currently-loaded large-sized image to the left. <br> Different sized images may be called out for different positions in the Catalog content. If available it is good to have each of these 4 types loaded. <P> Insert Default Image URL, then click on the type to upload, either [.jpg] or [.gif]. Click on the link [clear] to remove the current graphic without replacement.

#### .9.4.6.8 Detail Image

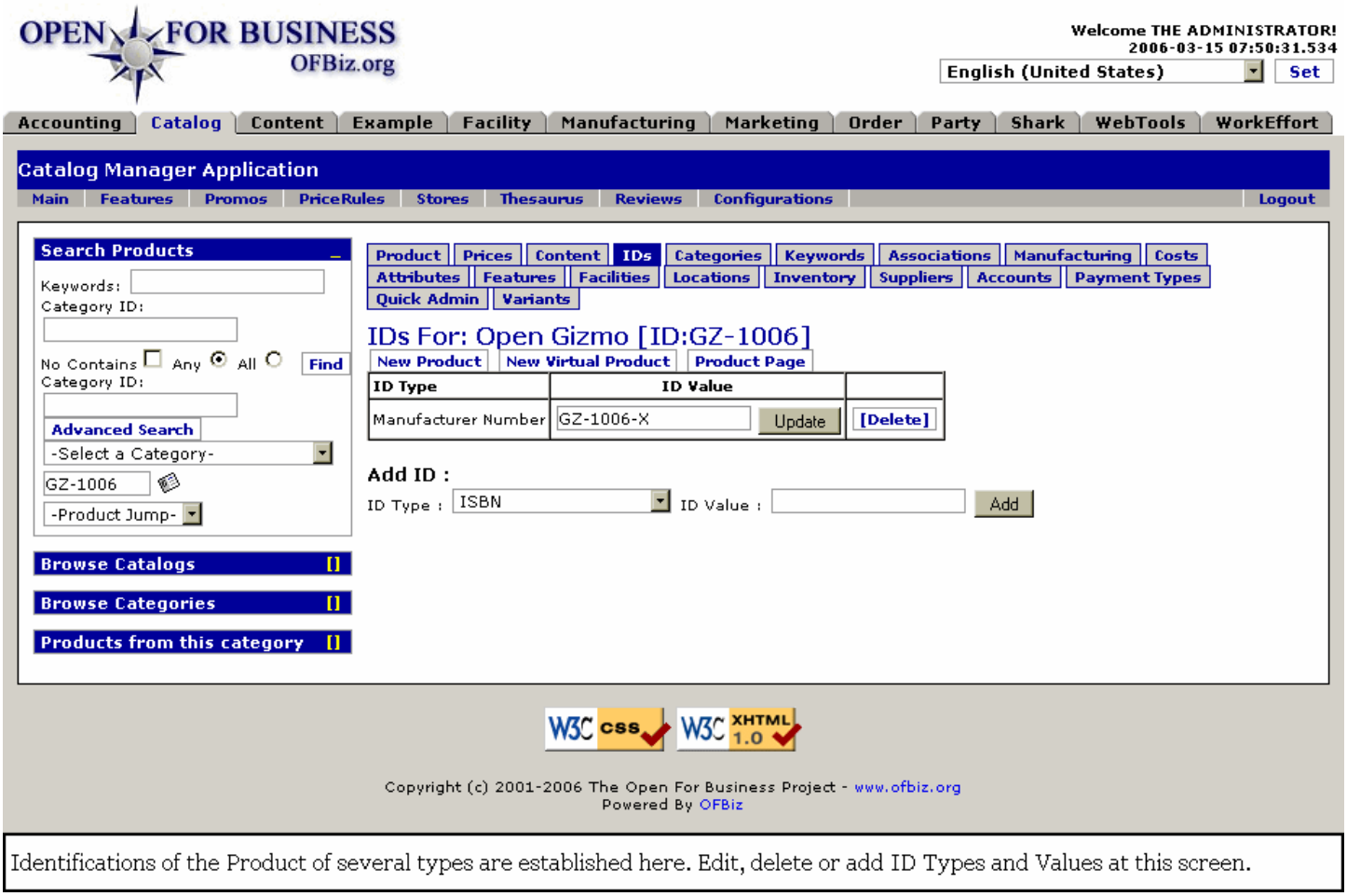
Displays currently-loaded Detail Image to the left. <br> Different sized images may be called out for different positions in the Catalog content. If available it is good to have each of these 4 types loaded. <P> Insert Default Image URL, then click on the type to upload, either [.jpg] or [.gif]. Click on the link [clear] to remove the current graphic without replacement.

### .9.4.7 Upload Image

Enter the Image URL, or select through the Browse function. Then select an applicable Radio Button (Small / Medium / Large / Detail) and click on [Upload Image]. <p> This function accomplishes the same purpose as each of the related lines above but, as it can only upload one image at a time, it will most likely be used for making changes.

## .9.5 IDs

### .9.5.1 EditProductGoodIdentifications




Identifications of the Product of several types are established here. Edit, delete or add ID Types and Values at this screen.

## .9.5.2 link buttons

[Update] [Delete] [Add] [New Product] [New Virtual Product] [Product Page] <B> [Product] [Prices] [Content] [IDs] [Categories] [Keywords] [Associations] [Manufacturing] [Costs] [Attributes] [Features] [Facilities] [Locations] [Inventory] [Suppliers] [Accounts] [Payment Types] [Quick Admin] [Variants] [Configurations] </B>

## .9.5.3 Table of existing types and values

### .9.5.3.1 ID Type

This is selected in the Add ID tool, below. It cannot be changed here without creating a new one and deleting the incorrect one.

### .9.5.3.2 ID Value

This field can be edited. Click on [Update] after any changes are complete.

## .9.5.4 Tool to Add ID

### .9.5.4.1 ID Type (drop-down box)

Typical ID types include: <p> <B> ISBN </B> International Standard Book Number <br> <B> Manufacturer Number </B> Product ID assigned by the Manufacturer; this could be your company or the OEM <B> <br> Other <br> SKU </B> unique code identifier of inventory item <B> <br> UPCA </B> Universal Product Code, type A <B><br> UPCE </B> Universal Product Code, type E

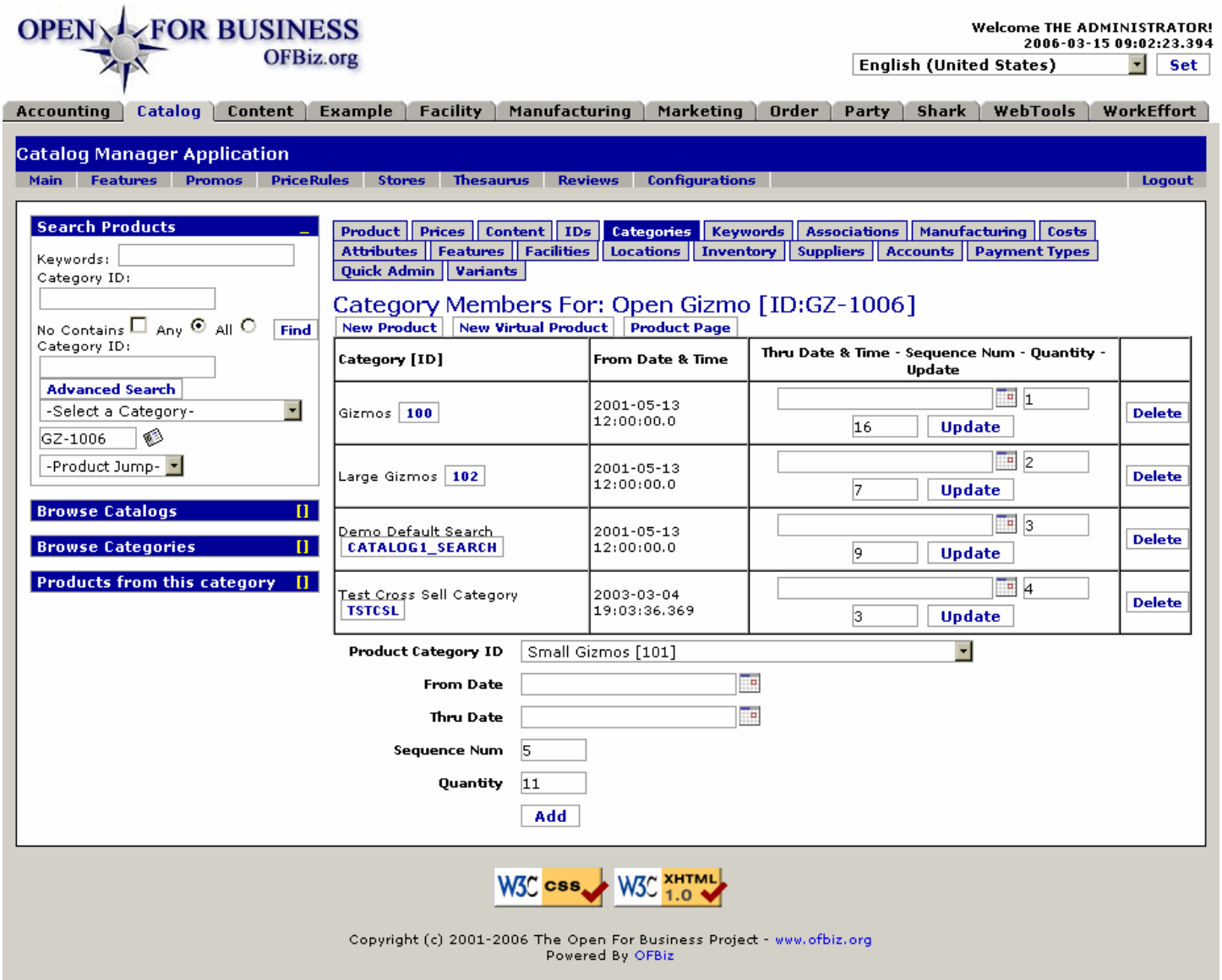
### .9.5.4.2 ID Value

Enter the unique value here, then click on [Add].

## .9.6 Categories

### .9.6.1 EditProductCategories

id:[DOCCAT1028] image:




Existing Categories linked to this Product are shown or deleted, new ones assigned, and duration of linkage set here.

### .9.6.2 link buttons

[Update] [Delete] [Add] [New Product] [New Virtual Product] [Product Page] <B> [Product] [Prices] [Content] [IDs] [Categories] [Keywords] [Associations] [Manufacturing] [Costs] [Attributes] [Features] [Facilities] [Locations] [Inventory] [Suppliers] [Accounts] [Payment Types] [Quick Admin] [Variants] [Configurations] </B>

### .9.6.3 Table of existing Category links

#### .9.6.3.1 Category ID

If it shows here, it should also appear in the Category searches under the Browse Categories tool in the LH pane. Click on the ID to jump to the EditCategory screen.

#### .9.6.3.2 From Date and Time

When the association with this Category was made or when it becomes effective.

#### .9.6.3.3 Thru Date and Time (popup calendar)

May be edited within the table. Use the popup calendar to indicate a date and time of expiration of the association with this category.

#### .9.6.3.4 Sequence Num

Optional sequencing number.

#### .9.6.3.5 Quantity

How many are available or will be accommodated.

### .9.6.4 Tool to link other Product Categories

#### .9.6.4.1 Product Category ID (drop-down box)

All the existing Product Categories are listed in the drop-down list. Select the one you wish to add.

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

If you leave blank, the entry will default to now, when you make the association. Use the popup calendar to select a different time of effectivity.

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

Optional. Assign a date only if you want the association to expire by a certain future time.

#### .9.6.4.4 Sequence Num

Optional. Use only if you have a sequencing system in place.

#### .9.6.4.5 Quantity

How many.

## .9.7 Keywords

### .9.7.1 Discussion about keywords

As it says on the screen below, 'Keywords are automatically created when product information is changed, but you may manually CREATE or DELETE keywords here as well.' On the Main page of the Catalog Manager is a link to [Auto Create Keywords for All Products]; that will also create them. <p> Keywords are used in searches. If there are other keywords not already used in related text about the product, this is a good time to add them. Some people might call a Widget a 'thingamabob'; if you do not associate it here, searches for thingamabobs will not bring up Widgets in their search.<p> Also overlooked are common misspellings. A search for 'Wigit' will not return 'Widget' even if that was the intended object. You can add misspelled words to the keywords to aid in customer searches. If you have an international market, consider including foreign terms for your keywords as well.

### .9.7.2 EditProductKeyword

All Keyword editing functions can be performed here, to include "re-inducing" keywords.

## .9.7.3 link buttons

[Edit Product] [Re-induce Keywords ] [Delete All Keywords] [Delete] [Add] [New Product] [New Virtual Product] [Product Page] <B> [Product] [Prices] [Content] [IDs] [Categories] [Keywords] [Associations] [Manufacturing] [Costs] [Attributes] [Features] [Facilities] [Locations] [Inventory] [Suppliers] [Accounts] [Payment Types] [Quick Admin] [Variants] [Configurations] </B>

## .9.7.4 Add product keyword

### .9.7.4.1 Keyword

Enter a word that is or should associate with the Product which might be used by someone trying to search for this type of product. Use all lower case letters.

#### .9.7.4.2 Weight

Weight refers to relative values of some words over others in a search.

### .9.7.5 Table of existing Keywords

#### .9.7.5.1 (Weight)

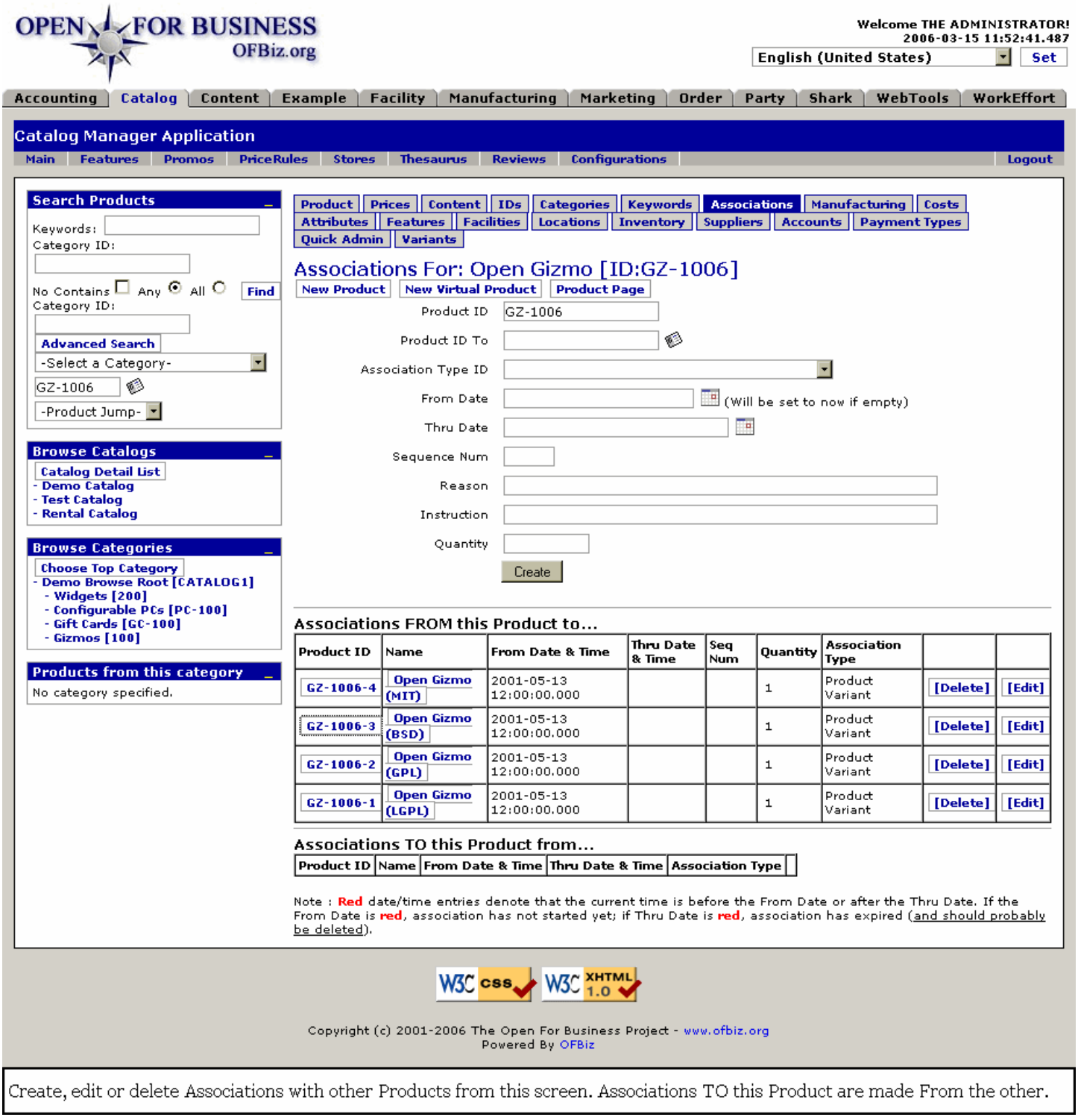
Although not labeled, the first column is the assigned Weight for the associated Keyword.

#### .9.7.5.2 (Keyword)

The second column is the number, letter or word determined to be a useful Keyword in searching for this product. If you do not wish it to be considered in searches, use the [Delete] button to remove it.

## .9.8 Associations

### .9.8.1 EditProductAssoc-create




Create, edit or delete Associations with other Products from this screen. Associations TO this Product are made From the other.

## .9.8.2 link buttons

[Create] [Delete] [Edit] [New Product] [New Virtual Product] [Product Page] <B> [Product] [Prices] [Content] [IDs] [Categories] [Keywords] [Associations] [Manufacturing] [Costs] [Attributes] [Features] [Facilities] [Locations] [Inventory] [Suppliers] [Accounts] [Payment Types] [Quick Admin] [Variants] [Configurations]</B>

## .9.8.3 Tool to Create Associations

### .9.8.3.1 Product ID

Populated by current selection; enter another Product ID to create another set of associations.

### .9.8.3.2 Product ID To (popup search tool)

Select the associated Product from the popup search tool.

### .9.8.3.3 Association Type ID (drop-down box)

Describes the relationship between these products. Select from one of the following: <B><P> Also Bought <br> Upgrade or Up-Sell <br> Complementary or Cross Sell <br> Incompatable <br> New Version, Replacement <br> Marketing Package Component <br> Marketing Package Auto Explode Component <br> Actual Product Component <br> Equivalent or Substitute <br> Product Variant <br> Revision <br> Unique Item <br> Manufacturing Bill of Materials <br> Engineering Bill of Materials <br> Product Manufactured As</B>

### .9.8.3.4 From Date (popup calendar)

If left blank, will default to Now.

### .9.8.3.5 Thru Date (popup calendar)

Enter only if the Association is to expire at a particular time in the future.

### .9.8.3.6 Sequence Num

Optional use if there is a sequencing method in place.

### .9.8.3.7 Reason

Why this Association was made. Although optional, this is good information for other employees to have who might not have participated in the decision to make the association.

### .9.8.3.8 Instruction

If this Association results in certain actions or other assignments to be made, record the requirements here.

### .9.8.3.9 Quantity

How many units are involved.

## .9.8.4 Table of Associations FROM ...

### .9.8.4.1 Table of Associations FROM ...

[Edit] brings up the EditProductAssoc screen for the associated product ID.

### .9.8.4.2 Product ID

This Product ID is being associated TO. As the Table Label says, FROM the selected Product To the items listed here. Click on the ID number and you are taken to the Edit Product page for that product.

### .9.8.4.3 Name

The name of the associated Product. Click on either the ID number or this Name and you are taken to the Edit Product page for that product.

### .9.8.4.4 From Date and Time

Date of effectivity or creation of the Association.

### .9.8.4.5 Thru Date and Time

When the Association will expire.

### .9.8.4.6 Seq Num

Optional - Sequencing number.

### .9.8.4.7 Quantity

How many, if there are any restrictions on the Association.

### .9.8.4.8 Association Type

Describes the relationship between these products. Was assigned as one of the following:<P> Also Bought <br> Upgrade or Up-Sell <br> Complementary or Cross Sell <br> Incompatable <br> New Version, Replacement <br> Marketing Package Component <br> Marketing Package Auto Explode Component <br> Actual Product Component <br> Equivalent or Substitute <br> Product Variant <br> Revision <br> Unique Item <br> Variant <br> Manufacturing Bill of Materials <br> Engineering Bill of Materials <br> Product Manufactured As

## .9.8.5 Table of Associations TO ...

### .9.8.5.1 Product ID

Click on the Product ID to be taken to the Product page for this Product. <P> Note: You must create the association TO this Product from the one we have been analyzing at THIS OTHER product's page. At that point, it will be seen as From that product To this product.

### .9.8.5.2 Name

Name of the Product. Click on either the ID number or this Name and you are taken to the Edit Product page for that product.

### .9.8.5.3 From Date and Time

Date of effectivity or original assignment.

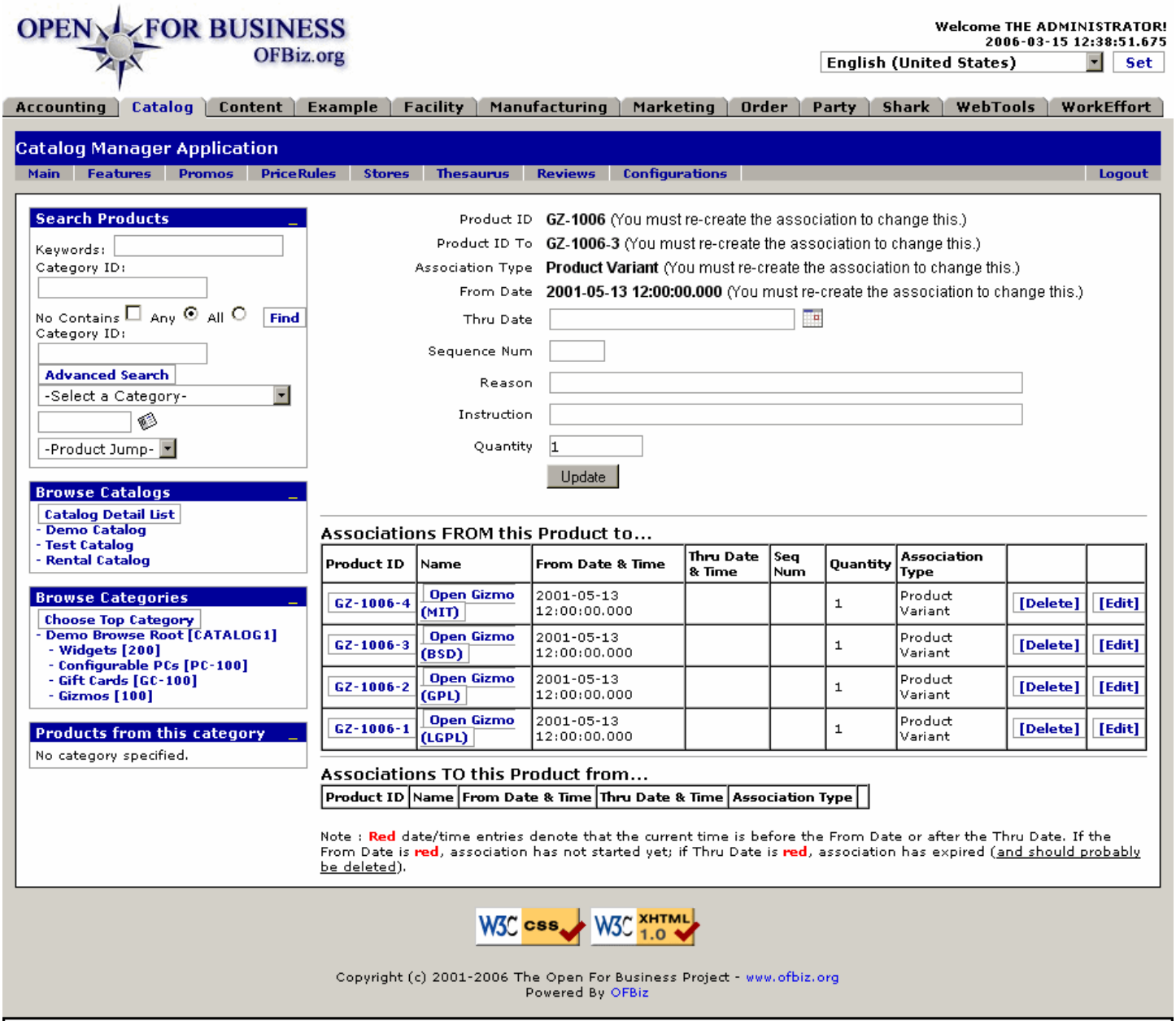
### .9.8.5.4 Thru Date and Time

Date the Association expires.

### .9.8.5.5 Association Type

Describes the relationship between these products. Was assigned as one of the following:<P> Also Bought <br> Upgrade or Up-Sell <br> Complementary or Cross Sell <br> Incompatable <br> New Version, Replacement <br> Marketing Package Component <br> Marketing Package Auto Explode Component <br> Actual Product Component <br> Equivalent or Substitute <br> Product Variant <br> Revision <br> Unique Item <br> Variant <br> Manufacturing Bill of Materials <br> Engineering Bill of Materials <br> Product Manufactured As

## .9.8.6 EditProductAssoc-edit



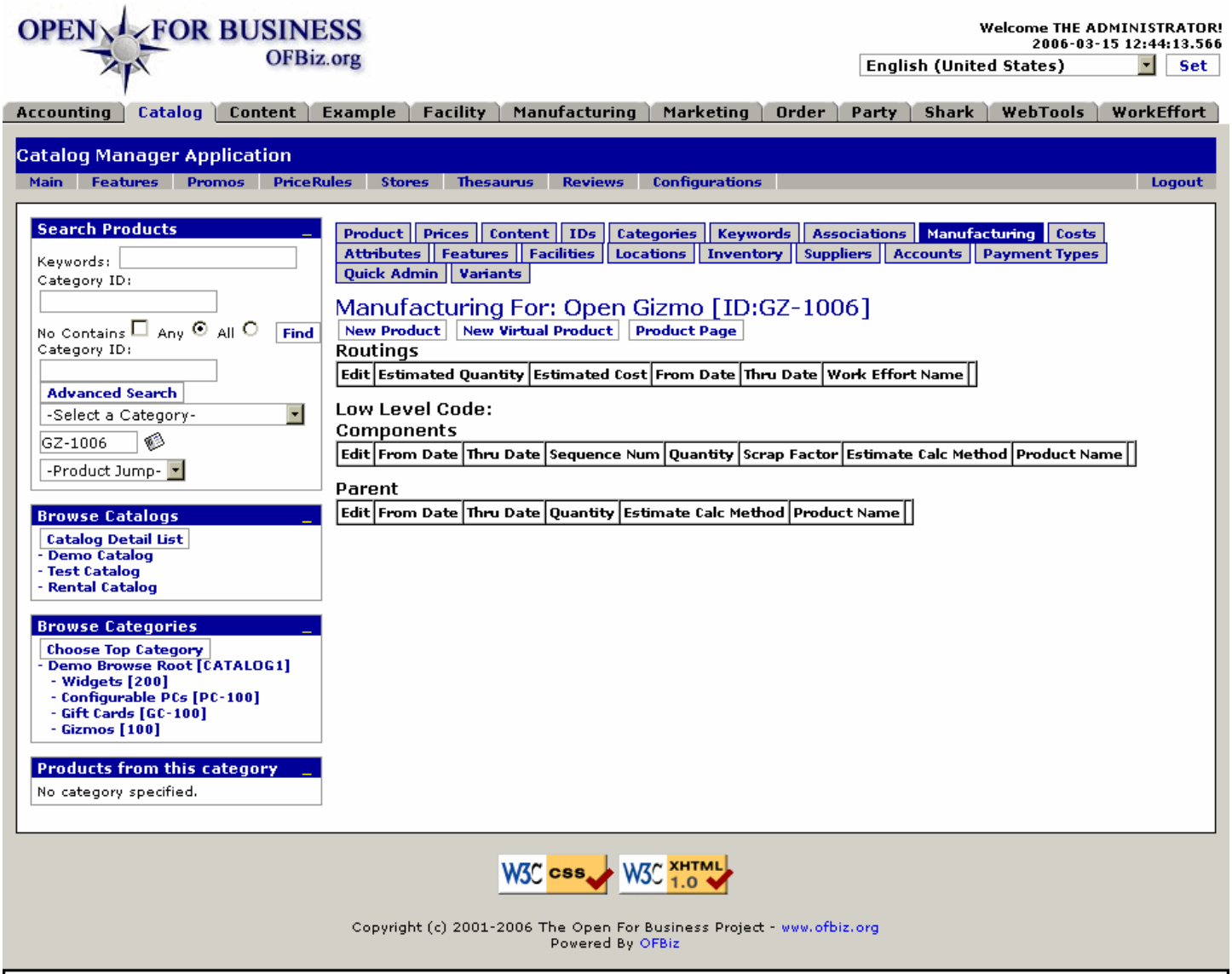

Those items which can be edited are presented, along with the table of all associations.

### .9.8.7 link buttons

[Update]

## .9.9 Manufacturing

### .9.9.1 ViewProductManufacturing




Data in tables will reflect inputs in the Manufacturing Manager; these are summaries. Click under Edit column.

## .9.9.2 link buttons

[New Product] [New Virtual Product] [Product Page] <B> [Product] [Prices] [Content] [IDs] [Categories] [Keywords] [Associations] [Manufacturing] [Costs] [Attributes] [Features] [Facilities] [Locations] [Inventory] [Suppliers] [Accounts] [Payment Types] [Quick Admin] [Variants] [Configurations] </B>

## .9.9.3 Table of Routings

### .9.9.3.1 Edit

This would be the link to the ID for editing the manufacturing Routing details.

### .9.9.3.2 Estimated Quantity

How many to be manufactured.

### .9.9.3.3 Estimated Cost

How much it will probably cost.

#### .9.9.3.4 From Date

When the work is to begin.

#### .9.9.3.5 Thru Date

When the work is to be completed.

#### .9.9.3.6 Work Effort Name

Name assigned to the effort.

### .9.9.4 Low Level Code: Components

This table extracts information from the Low Level Code component breakout and presents the data under the following headings: Edit | From Date | Thru Date | Sequence Num | Quantity | Scrap Factor | Estimate Calc Method | Product Name.

### .9.9.5 Low Level Code: Parent

Details of the Parent source of the low level code are presented in a table with the following headings: Edit | From Date | Thru Date | Quantity | Estimate Calc Method | Product Name.

## .9.10 Costs

### .9.10.1 EditProductCosts

Track the component parts of product Costs here. These costs can be used in proposals and setting prices.

## .9.10.2 link buttons

[Edit] [Submit] [New Product] [New Virtual Product] [Product Page] <B> [Product] [Prices] [Content] [IDs] [Categories] [Keywords] [Associations] [Manufacturing] [Costs] [Attributes] [Features] [Facilities] [Locations] [Inventory] [Suppliers] [Accounts] [Payment Types] [Quick Admin] [Variants] [Configurations] </B>

## .9.10.3 Table of Costs components

### .9.10.3.1 Cost Component ID

Once created, the Component is given an ID number. When you click this number to edit the component. The terms will appear below under the <B>Product Edit Cost Component </B>section where you may change any element of the Cost.

### .9.10.3.2 Cost Component Type ID

Types are listed below in the description of fields used in creating Cost Components.

### .9.10.3.3 Product Feature ID

When a Product Feature is incorporated into a Product, you can identify this portion of the cost as being driven by the Feature specified here.

### .9.10.3.4 Party ID

Party establishing or entering this Cost item is identified here.

### .9.10.3.5 Geo ID

If this cost is only for or within a specific geographical area, that would be indicated by a Geo code here.

### .9.10.3.6 From Date (and Time)

Displays either the date and time when the Cost was established or the date and time when it became (or will become) effective. <P> NOTE: If the date appears here in red, that indicates a future date; such a Cost is not yet effective.

### .9.10.3.7 Thru Date (and Time)

The date and time when the Cost has expired or will expire. <P> NOTE: If the date appears here in red, that indicates the Cost has already expired. If you wish to renew the Cost item, click on the Cost Component Id in the LH column. The terms will appear below under the <B>Product Edit Cost Component </B>section where you may change the Thru Date and any other element of the Cost.

### .9.10.3.8 Cost

This number is the raw value, in the currency selected, for the Cost Component Type portion of the total cost of the Product.

### .9.10.3.9 CommonCurrencyUomId (drop-down box)

Which currency the cost is established in.

## .9.10.4 ProductEditCostComponent

### .9.10.4.1 Cost Component Type Id (drop-down box)

Select from the drop-down box which Type of cost element this Component will be. Choices available might include: <B> <P> Estimated Standard Labor Cost <br> Estimated Standard Materials Cost <br> Estimated Standard Other Cost <br> Estimated Standard Route Cost </B> (Fixed Asset usage)

### .9.10.4.2 Product Feature ID

When a Product Feature is incorporated into a Product, you can identify this portion of the cost as being driven by the Feature specified here. Enter only the Feature ID as known to the system. Use the Features tab of the Order manager to identify and create Features Types.

### .9.10.4.3 Party Id

Which Party established or is responsible for this Component.

### .9.10.4.4 Geo Id

If this cost is only for or within a specific geographical area, that can be indicated by a Geo code entered here.

### .9.10.4.5 From Date (popup calendar)

If nothing entered, defaults to the date and time when the Cost was established. You may enter the date and time when it became (or will become) effective.

### .9.10.4.6 Thru Date (popup calendar)

Only enter a date if this Cost Component will expire at a known point in the future.

#### .9.10.4.7 Cost

Enter only the portion of the cost that is expressed in this component as specified by the Cost Component Type ID and within any other parameters presented in this component. Be sure to also select the Currency before you click [Create] or [Update].

#### .9.10.4.8 CommonCurrencyUomId (drop-down box)

Find the currency in the drop-down box.

#### .9.10.4.9 Cost Component Id (edit mode only)

When you have clicked upon the Cost Component ID in the table, all elements of the cost are displayed in this section of the screen. That number appears here only during this edit mode, giving you confirmation that you are working on the correct Cost Component. You may NOT change or edit this number.

### .9.10.5 ProductAutoCreateCosts

#### .9.10.5.1 Discussion

This tool will consolidate existing, compatible Cost Components into a new Component, basically adding the other values together and placing this new Component into the table with a new Type designation.

#### .9.10.5.2 Currency Uom Id (drop-down box)

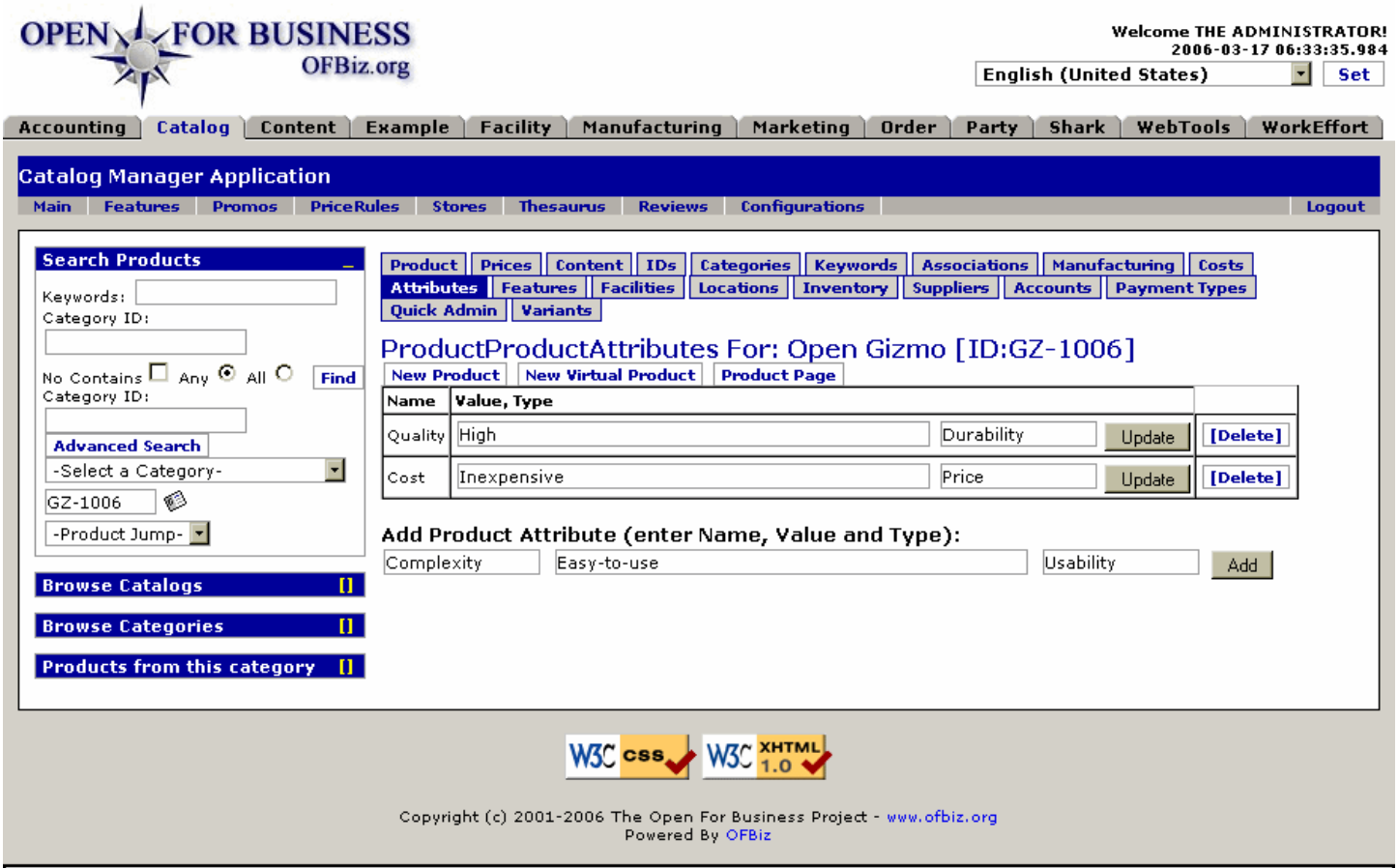
Select the appropriate currency from the drop-down box.

#### .9.10.5.3 Cost Component Type Prefix (drop-down box)

There will be at least two choices here. Select one of them, then click the [Submit] button. The new Component Cost should appear in the table, above. Types offered might be: <P> <B> --- <br> Estimated Standard Costs </B>

## .9.11 Attributes

### .9.11.1 UpdateProductAttribute




Product Attributes are declared and assigned from this screen.

## .9.11.2 link buttons

[Update] [Delete] [Add] [New Product] [New Virtual Product] [Product Page] <B> [Product] [Prices] [Content] [IDs] [Categories] [Keywords] [Associations] [Manufacturing] [Costs] [Attributes] [Features] [Facilities] [Locations] [Inventory] [Suppliers] [Accounts] [Payment Types] [Quick Admin] [Variants] [Configurations] </B>

## .9.11.3 Table of attributes

### .9.11.3.1 Name

What the attribute is called.

### .9.11.3.2 Value

Words to describe this value of the product.

### .9.11.3.3 Type

What type of an attribute this is.

## .9.11.4 Tool to Add Product Attribute

### .9.11.4.1 (box for Name)

Enter a descriptive name for the attribute.

### .9.11.4.2 (box for Value)

Enter a word or words to describe the Value of this Attribute.

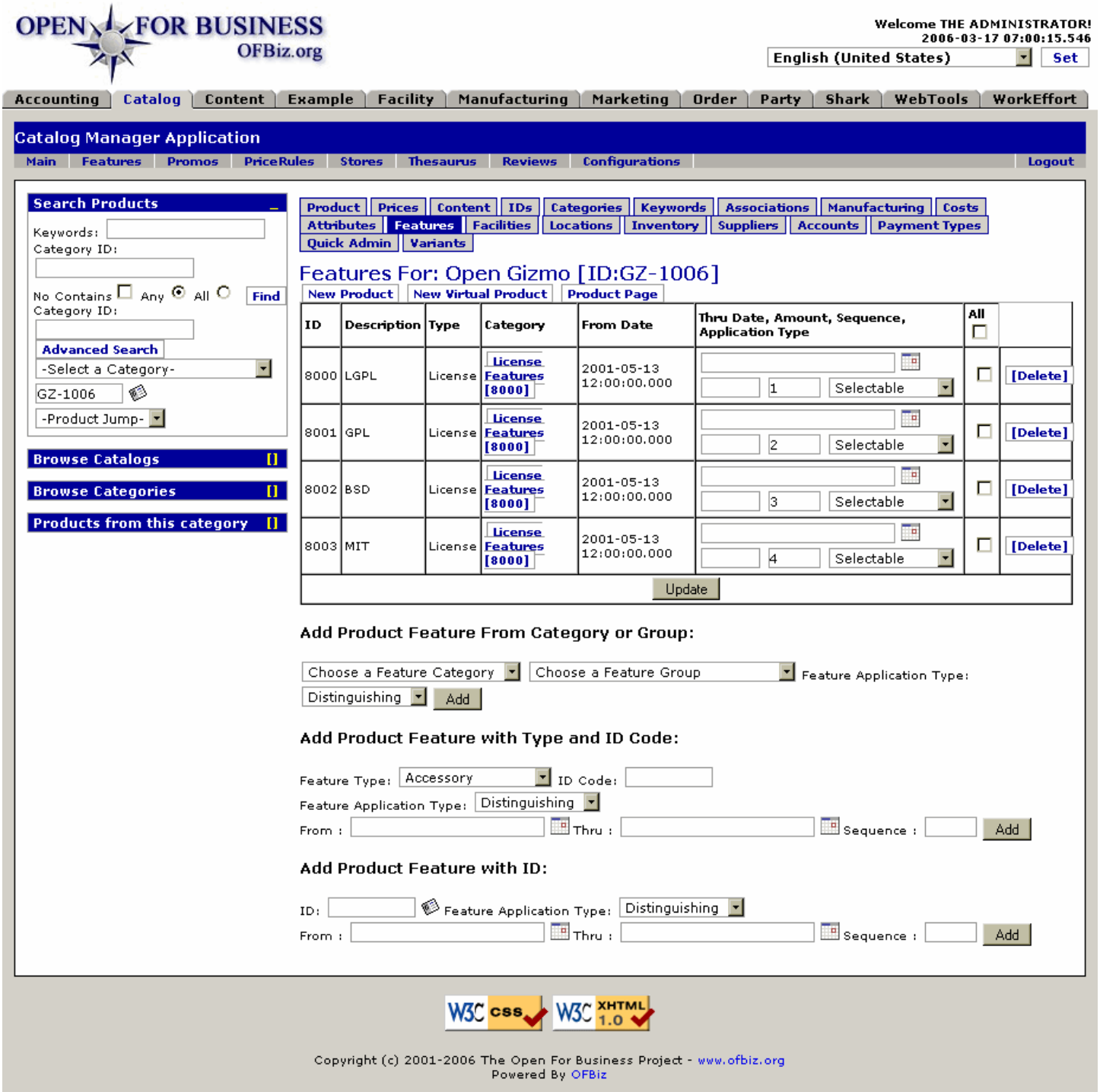
### .9.11.4.3 (box for Type)

Enter a term to define what type of an attribute this is.

## .9.12 Features

### .9.12.1 EditProductFeatures

id:[DOCCAT1089] image:




Product Features for the catalog are selected here. Features are then applied to the Catalog, or scheduled for later inclusion.

## .9.12.2 link buttons

[Update] [Delete] [Add] [New Product] [New Virtual Product] [Product Page] <B> [Product] [Prices] [Content] [IDs] [Categories] [Keywords] [Associations] [Manufacturing] [Costs] [Attributes] [Features] [Facilities] [Locations] [Inventory] [Suppliers] [Accounts] [Payment Types] [Quick Admin] [Variants] [Configurations] </B>

## .9.12.3 Table of features

### .9.12.3.1 ID

This is the Feature ID number. You cannot edit it here. Click on the corresponding item under Category to edit the Feature.

### .9.12.3.2 Description

Short description which helps to identify this Feature from other features with similar IDs.

### .9.12.3.3 Type

What type of a feature this is.

### .9.12.3.4 Category

When you click on the link in this Type column, you are taken to the Feature tab where you can edit the Feature.

### .9.12.3.5 From Date

Date this Feature was assigned to this Product, or the date of its scheduled effectivity.

### .9.12.3.6 Thru Date (popup calendar)

Date this Feature is scheduled to expire, cancel or terminate its relationship to the Product. Use the popup calendar to enter or edit a new expiration date.

### .9.12.3.7 Amount

You can enter an Amount at any time.

### .9.12.3.8 Sequence

If a sequencing system is in place, the sequence number can be entered or changed here.

### .9.12.3.9 Application Type (drop-down box)

Select from one of the following Application Types: <P><B> Selectable <br> Distinguishing <br> Optional <br> Required <br> Standard </B>

### .9.12.3.10 All

Checkboxes in this column to identify which rows will be updated when the [Update] link is clicked. If you check the top box, all of the rows will be updated.

## .9.12.4 Add Product Feature from Category or Group

### .9.12.4.1 Category (drop-down box)

Select a Feature Category from the drop-down box.

### .9.12.4.2 Feature Group (drop-down box)

Choose a Feature Group from the drop-down box.

### .9.12.4.3 Feature Application Type (drop-down box)

Select from one of the following Application Types: <P><B> Selectable <br> Distinguishing <br> Optional <br> Required <br> Standard </B>

### .9.12.5 Add Product Feature with Type and ID Code

#### .9.12.5.1 Feature Type (drop-down box)

Choose a Feature Type from the drop-down box.

#### .9.12.5.2 ID Code

Enter an ID Code by which the new Product Feature will be known.

#### .9.12.5.3 Feature Application Type (drop-down box)

Choose one of the Application Types from the drop-down box. Choices would include:<P><B> Distinguishing <br> Optional <br> Required <br> Selectable <br> Standard</B>

#### .9.12.5.4 From (popup calendar)

Defaults to Now.

#### .9.12.5.5 Thru (popup calendar)

Enter only if the Feature's association with the Product must expire at some future point.

#### .9.12.5.6 Sequence

Include if a sequencing system is in place.

### .9.12.6 Add Product Feature with ID

#### .9.12.6.1 ID (popup search tool)

Select from popup search tool.

#### .9.12.6.2 Feature Application Type (drop-down box)

Choose one of the Application Types from the drop-down box. Choices would include:<P><B> Distinguishing <br> Optional <br> Required <br> Selectable <br> Standard</B>

#### .9.12.6.3 From (popup calendar)

Defaults to Now.

#### .9.12.6.4 Thru (popup calendar)

Enter a future date only if the association with this Product is to be ended at some point.

#### .9.12.6.5 Sequence

Optional; enter if a sequencing system is in place.

## .9.13 Facilities

### .9.13.1 EditProductFacilities

Here you specify which Facility carries the Product, establish stock and re-order levels, and show time needed to replenish stock.

## .9.13.2 link buttons

[Update] [Delete] [Add] [New Product] [New Virtual Product] [Product Page] <B> [Product] [Prices] [Content] [IDs] [Categories] [Keywords] [Associations] [Manufacturing] [Costs] [Attributes] [Features] [Facilities] [Locations] [Inventory] [Suppliers] [Accounts] [Payment Types] [Quick Admin] [Variants] [Configurations]</B>

## .9.13.3 Table of facilities

### .9.13.3.1 Facility

The named facility.

### .9.13.3.2 Minimum Stock

The level at which stock needs to be reordered.

### .9.13.3.3 Reorder Quantity

How many to reorder when stock level reaches minimum.

### .9.13.3.4 Days to Ship

How long it takes a vendor or the manufacturing section to deliver the replacement stock.

## .9.13.4 Add Facility

### .9.13.4.1 Facility (drop-down box)

Select the Facility from the drop-down box.

### .9.13.4.2 Minimum Stock

The minimum stock level at which product needs to be reordered.

### .9.13.4.3 Reorder Quantity

How much product needs to be reordered when the stock level reaches the minimum level.

### .9.13.4.4 Days to Ship

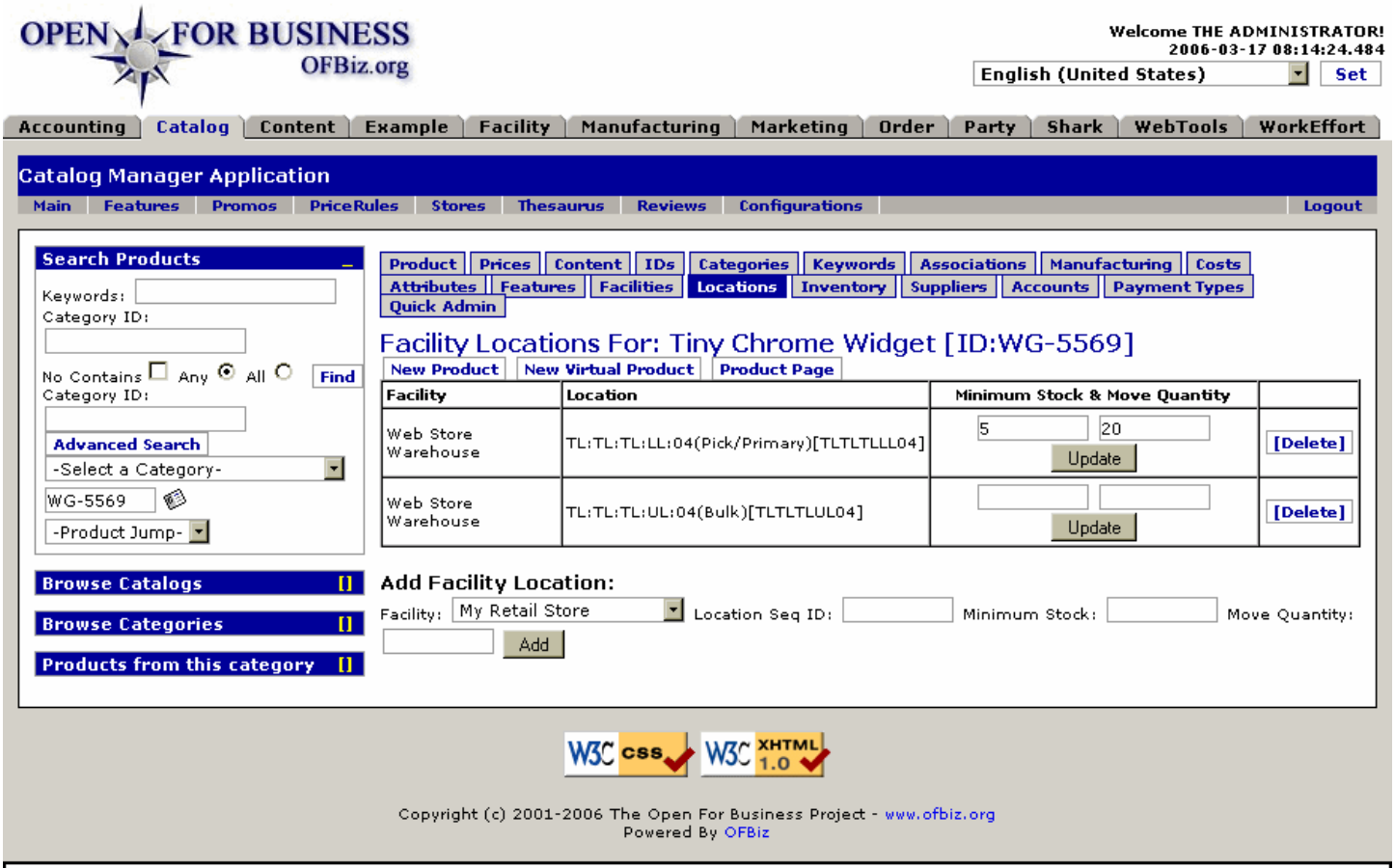
How many days to receive the product from a Vendor or the factory.

## .9.14 Locations

Virtual products will not have a location, only their variants.

### .9.14.1 EditProductFacilityLocations

id:[DOCCAT1144] image:




Update or add location of the Product within a Facility. Location Sequence is specific; see the Facility Manager.

### .9.14.2 link buttons

[Add] [Update] [Delete] [New Product] [New Virtual Product] [Product Page] <B> [Product] [Prices] [Content] [IDs] [Categories] [Keywords] [Associations] [Manufacturing] [Costs] [Attributes] [Features] [Facilities] [Locations] [Inventory] [Suppliers] [Accounts] [Payment Types] [Quick Admin] [Variants] [Configurations] </B>

### .9.14.3 Table of existing locations

#### .9.14.3.1 Facility

The Facility where the Product is being Located.

#### .9.14.3.2 Location

The place within the Facility where the Product will be found.

#### .9.14.3.3 Minimum Stock

The minimum stock level at which more stock is ordered to replenish.

#### .9.14.3.4 Move Quantity

The minimum amount to be moved to this location.

### .9.14.4 Add Facility Location

#### .9.14.4.1 Facility (drop-down box)

Select the Facility within which you will specify a stock location.

#### .9.14.4.2 Location Sequence ID

This is a specific kind of ID that is actually created in the Facilities Manager.

#### .9.14.4.3 Minimum Stock

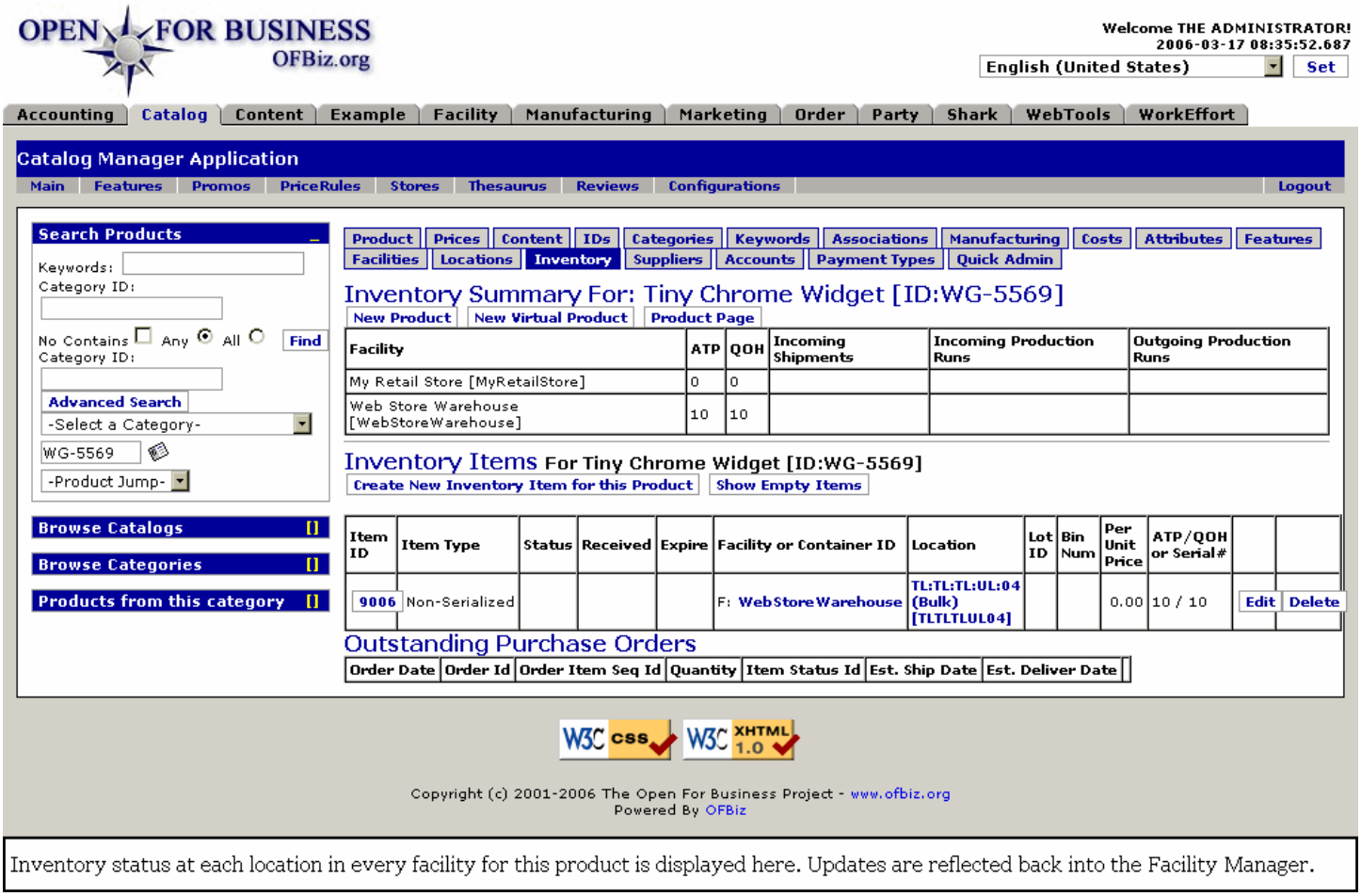
The minimum quantity of Product at which point stock is to be reordered.

#### .9.14.4.4 Move Quantity

Amount of stock to be moved.

## .9.15 Inventory

### .9.15.1 EditProductInventoryItems




Inventory status at each location in every facility for this product is displayed here. Updates are reflected back into the Facility Manager.

## .9.15.2 link buttons

[Create New Inventory Item for this Product ] [Show/Hide Empty Items] [Edit] [Delete] [New Product] [New Virtual Product] [Product Page] <B>[Product] [Prices] [Content] [IDs] [Categories] [Keywords] [Associations] [Manufacturing] [Costs] [Attributes] [Features] [Facilities] [Locations] [Inventory] [Suppliers] [Accounts] [Payment Types] [Quick Admin] [Variants] [Configurations] </B>

## .9.15.3 Inventory Summary table

### .9.15.3.1 Facility

Name and ID of the facility where the Inventory is located.

### .9.15.3.2 ATP

Number of units Available To Process at each location.

### .9.15.3.3 QOH

What the actual Quantity On Hand consists of at the time of Inventory. Some of the QOH could be held for outstanding orders, thus not be available to process.

### .9.15.3.4 Incoming Shipments

If there were Incoming Shipments, the ID number(s) would be indicated here.

### .9.15.3.5 Incoming Production Runs

If there were Incoming Production Runs, the ID numbers of those Production Runs would be given here.

### .9.15.3.6 Outgoing Production Runs

Product going out to another Facility or committed in a Sales Order would be identified by the ID number here.

## .9.15.4 Inventory Items

### .9.15.4.1 Discussion

Select the link [Create New ...] or click on the Item ID to jump you to the Facility Manager for creating a new item.

### .9.15.4.2 Item ID

Click on the ID and you are taken to the EditInventoryItem screen in the Facility Manager; see below in this topic for a screen shot. <P> NOTE: Product is not tracked by its Product ID as much as it is by its Inventory Item ID. You might have several locations with Product; by tracking it through Item ID, you can more accurately locate the Product when you need it. Thus, several different Item IDs may all have the same Product ID.

### .9.15.4.3 Item Type

Serialized or Non-Serialized. When each Item has its own serial number that needs to be tracked, Inventory is handled more tightly.

### .9.15.4.4 Status

The products in the Item ID might be On Hold in the receiving docks, Awaiting Inspection, Damaged In Transit, etc. Status is generally given if there is some situation keeping the product from being available for release to a customer.

### .9.15.4.5 Received

When the Inventory Item was received.

### .9.15.4.6 Expire

If the Inventory Item will expire, that is given here.

### .9.15.4.7 Facility or Container ID

If you click on the ID; it will link you to the Facility Manager > Facilities tab > Facility sub-tab with the Edit Facility screen for viewing.

### .9.15.4.8 Location

The Location ID is created from a concatenation of location specifics in the Facility Manager > Locations tab. Click on the Location ID here in this column and it will take you there in the EditFacilityLocation screen which you can edit or update.

### .9.15.4.9 Lot ID

If there is an ID for a specific Product Lot, it will be given here.

### .9.15.4.10 Bin Num

If the Product or at least this portion of it (Item ID) if kept in a Bin, that Bin Number will be given here.

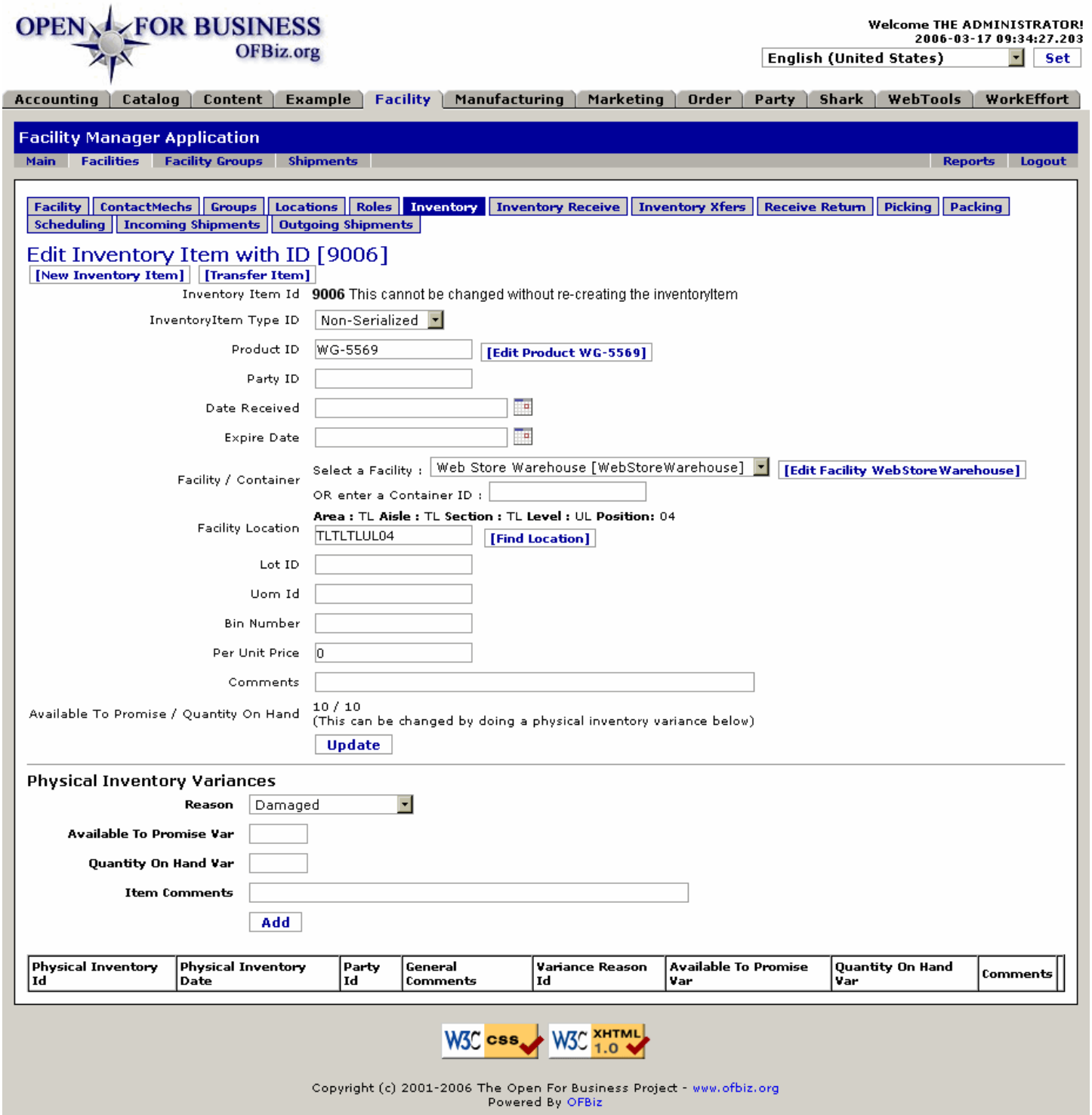
### .9.15.4.11 Price Per Unit

Price upon which total Inventory value is based.

### .9.15.4.12 ATP/QOH or Serial#

If non-serialized, the ATP is shown over the QOH. For serialized inventory, each line item will have its own Serial number.

### .9.15.4.13 EditInventoryItem




This screen (under the Facility Manager) deals specifically with the Inventory Item.

### .9.15.4.14 See the Facility Manager

Selecting the Item ID number (or the [Edit] link) jumps you to this item on the FacilityManager > Facilities > Inventory Items edit screen (EditInventoryItem). For more details, see the Facility Manager.

## .9.15.5 Outstanding Purchase Orders

If there are any outstanding Purchase Orders against this item, they will appear here with details given under the

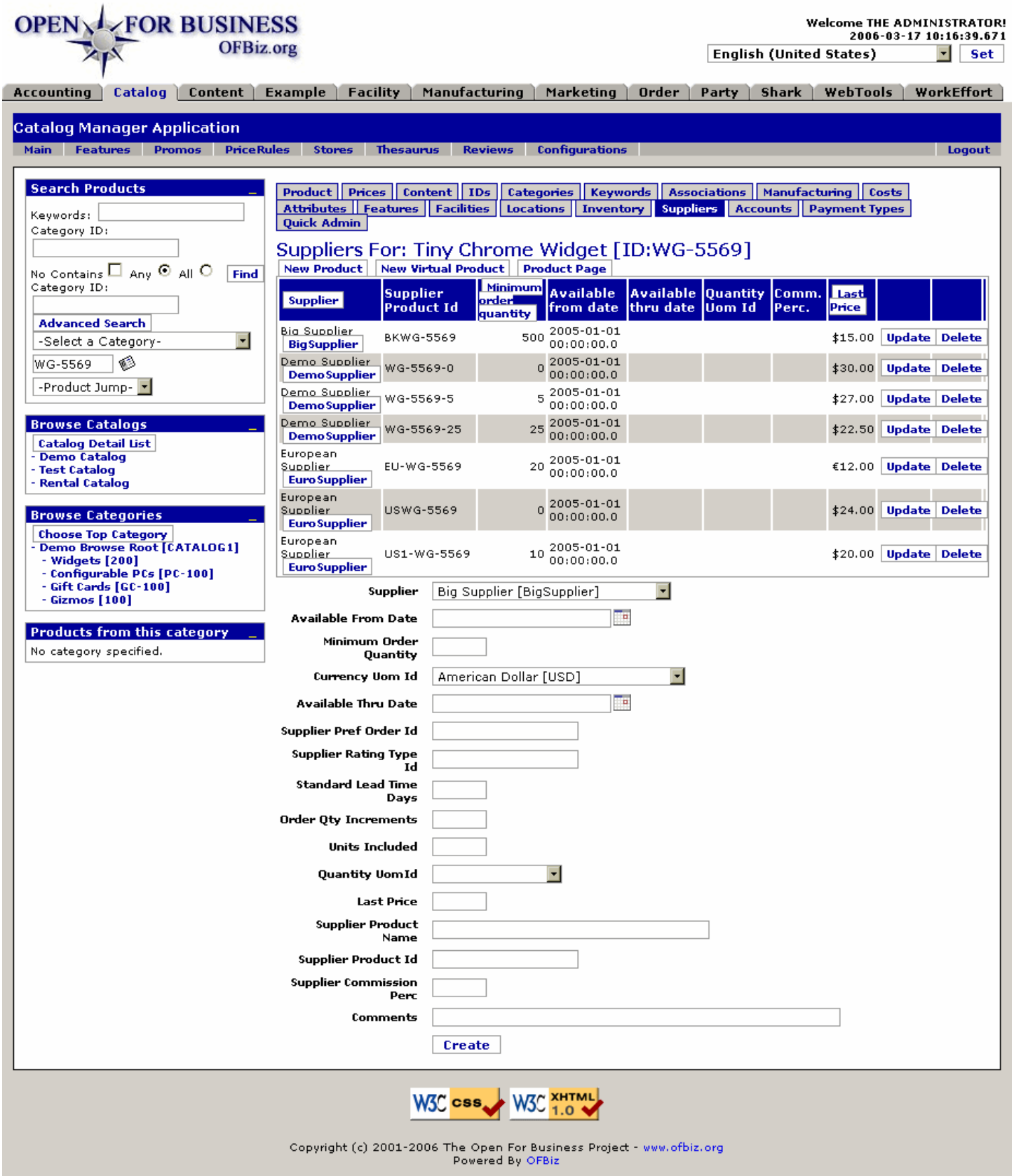
following headings: <B><br> Order Date <br> Order Id <br> Order Item Seq Id <br> Quantity <br> Item Status Id <br> Est. Ship Date <br> Est. Deliver Date </B>

# .9.16 Suppliers

## .9.16.1 Discussion

This section is critical to complete accurately. This is where you establish the details about your inventory sources. If this section is incomplete, you might not be able to order the item from your vendors! <P> Every product in every variant needs to have its own entry, with distinct details about every supplier for each item. You should only need to do this once, as part of establishing a new Product in your Store. <P> Each time you receive communication from your Vendor that changes details such as delivery time, minimum order quanitities, price breaks, etc., you should update your information here. <P> You will keep details about Promotions in the Catalog Promos section.

## .9.16.2 EditProductSuppliers




Associate Suppliers with the Product at this screen. Each must first have a PartyID; multiple suppliers for the product are shown.

## .9.16.3 link buttons

[Update] [Delete] [Create] [New Product] [New Virtual Product] [Product Page] <B> [Product] [Prices] [Content] [IDs] [Categories] [Keywords] [Associations] [Manufacturing] [Costs] [Attributes] [Features] [Facilities] [Locations] [Inventory] [Suppliers] [Accounts] [Payment Types] [Quick Admin] [Variants] [Configurations] </B>

## .9.16.4 Table of existing Suppliers

### .9.16.4.1 Table sort order

Three of the columns have reverse-color highlighting: Supplier, Minimum order quantity, and Last Price. You can click on the column title to have the items sorted by those categories.

### .9.16.4.2 Supplier

Click on the ID link to be taken to the Party Manager for more information about the Supplier.

### .9.16.4.3 Supplier Product ID

This is the ID used by the Supplier, not the number used by your company or catalog.

### .9.16.4.4 Minimum Order Quantity

What is the smallest number of units that can be ordered from this Supplier?

### .9.16.4.5 Available from date

If availability is not continuous, this tells you when it will be.

### .9.16.4.6 Available thru date

If the product will no longer be available after some date, the date is shown here.

### .9.16.4.7 Quantity UOM ID

Not all Product will be ordered in quantities of Each. When the Supplier sells only in case lots, for example, that will be specified here.

### .9.16.4.8 Comm. Perc.

The percentage charged by the Supplier as his commission, if any.

### .9.16.4.9 Last Price

What was the Price per Quantity UOM the last time you ordered from or received a Quote from this Supplier?

## .9.16.5 Tool to add new Supplier

### .9.16.5.1 Supplier (drop-down box)

Party must already exist in the Party Manager system with an assigned Role as a Supplier. Parties holding the Supplier Role appear in the drop-down box.

### .9.16.5.2 Available from date (popup calendar)

When was the Supplier first able to provide this Product for your company?

### .9.16.5.3 Minimum Order Quantity

Required field. MinimumOrderQuantity is used to define the minimum quantity of units that can be purchased from this supplier at this price. <P> NOTE: If you try to order fewer than this number when creating a Purchase Order, your order will not be processed. Be sure this is a valid number. If you have permission from your supplier to order a smaller quantity, change this number here before attempting to create the PO.

### .9.16.5.4 Currency Uom ID (drop-down box)

Required field. This is the currency's Uom ID (unit of measurement ID), e.g.: USD, Euro, etc.

#### .9.16.5.5 Available Thru Date (popup calendar)

When will the Vendor Role expire for this Supplier? This may be due to a periodic review, an announcement that they are no longer able to supply the Product, an agreement you have to make another Supplier the exclusive vendor, or any number of reasons.

#### .9.16.5.6 Supplier Pref Order ID

What does the Supplier use to identify your Product? This is the name or part number that you must use to obtain the correct item from this vendor.

#### .9.16.5.7 Supplier Rating Type ID

Give them a rating to compare them with other Suppliers.

#### .9.16.5.8 Standard Lead Time Days

How much advance notice is needed by this supplier to provide this product. Some products might be 'on the shelf;' others might need to be assembled or manufactured. This information is critical if you want to maintain a current inventory.

#### .9.16.5.9 Order Quantity Increments

Is the Supplier able to accommodate orders of 6 units this time, 25 units next, the 13 units at another time? That would mean an Order Qty Increment of '1'. Or does the order need to be in increments of 10, with a minimum order quantity stated as 30, for example, so you would need to order 30 or 40 or 80.

#### .9.16.5.10 Units Included

Similar to Order Qty Increments, but this would be a matter of how units are packaged. If the units are by the carton with 24 counts of a product in a carton, the units included would be 24.

#### .9.16.5.11 Quantity Uom ID (drop-down box)

When product is measured by some Unit of Measure that is specified by any of the UOM IDs on the drop-down list, use this. Otherwise, leave blank.

#### .9.16.5.12 Last Price

Last Price is the price for the item from the supplier. Whether as the result of a Price List sent out by them, or by their response to a Request for Quotation, or it is the last price you paid with your most recent order from them -- whatever the basis, this is the most accurate price you have for this item from this Supplier.

#### .9.16.5.13 Supplier Product Name

The name used by the Supplier, not your catalog or company name for the product (unless it happens to be the same!!).

#### .9.16.5.14 Supplier Product ID

What is the Code, or Part Number or specific Identification used by this Supplier for the Product you are ordering from them?

#### .9.16.5.15 Supplier Commission Perc

What Commission percentage this Supplier will charge on the order.

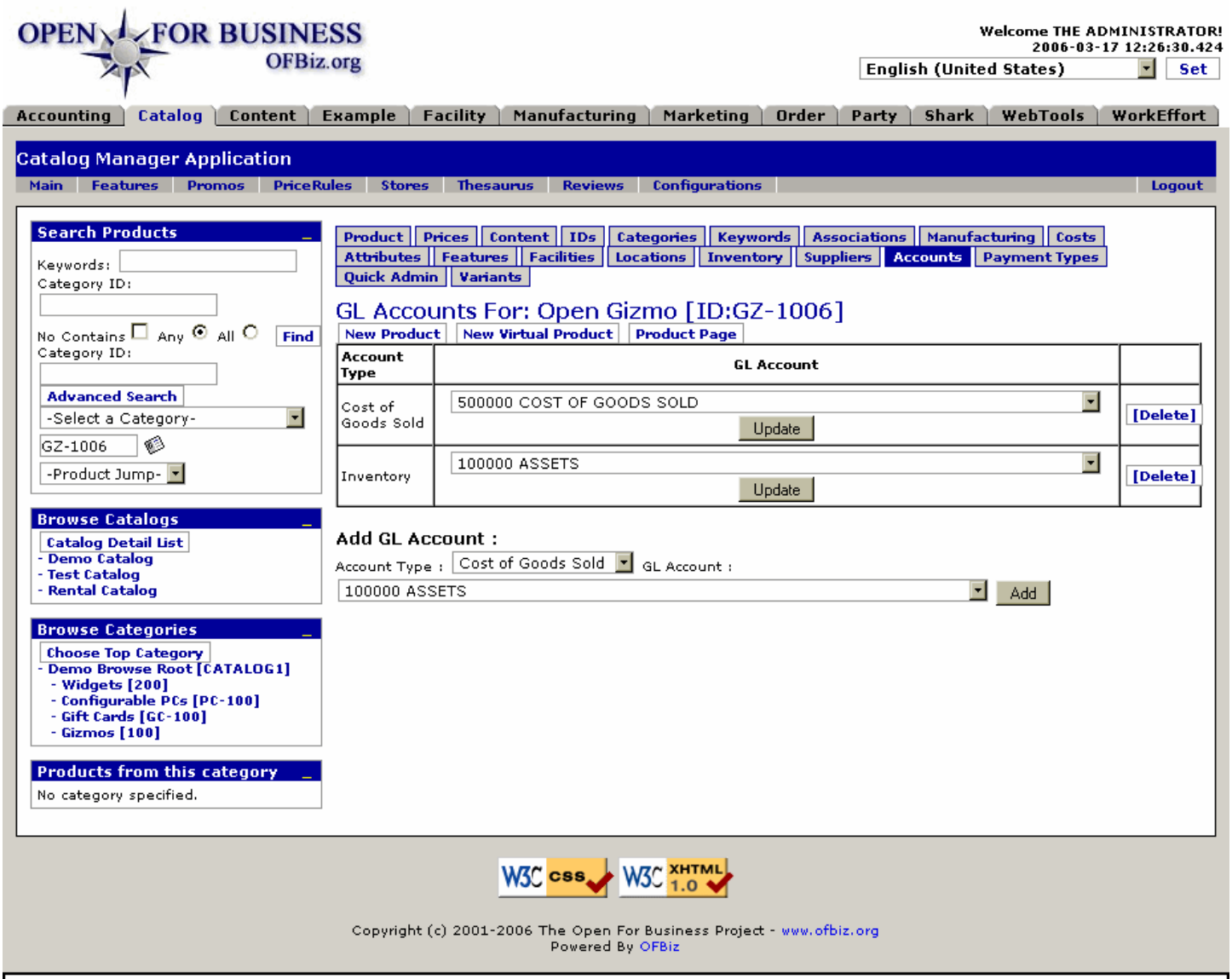
#### .9.16.5.16 Comments

Here you could note such information as the Factory Rep's name, the best time of day to reach the seller, any particular information to help you maintain a smooth customer relationship with this Supplier.

## .9.17 Accounts

### .9.17.1 EditProductGlAccounts

id:[DOCCAT1179] image:




General Ledger accounts for this Product may be assigned or updated from this screen. Connects with the Accounting Manager.

## .9.17.2 link buttons

[Update] [Delete] [Add] [New Product] [New Virtual Product] [Product Page] <B> [Product] [Prices] [Content] [IDs] [Categories] [Keywords] [Associations] [Manufacturing] [Costs] [Attributes] [Features] [Facilities] [Locations] [Inventory] [Suppliers] [Accounts] [Payment Types] [Quick Admin] [Variants] [Configurations]</B>

## .9.17.3 Table of assigned GL Accounts

### .9.17.3.1 Account Type

What type of Account is this: <br> Cost of Goods Sold <br> Inventory <br> Sales.

### .9.17.3.2 GL Account (drop-down box)

All GL Accounts appear in the drop-down box. You can change this at any time, but you should not do so without working with your accountant.

## .9.17.4 Add a General Ledger Account

### .9.17.4.1 Account Type (drop-down box)

Select from the drop-down box what type of Account this is: <P><B> Cost of Goods Sold <br> Inventory <br> Sales </B>

### .9.17.4.2 GL Account (drop-down box)

All GL Accounts appear in the drop-down box; assign an account from here, but you should not do so without working with your accountant.

## .9.18 Payment Types

### .9.18.1 EditProductPaymentMethodTypes

id:[13221] image:

View and edit any Payment type. These can be established, updated or deleted here.

### .9.18.2 link buttons

[Update] [Delete] [Create] [New Product] [New Virtual Product] [Product Page] <B> [Product] [Prices] [Content] [IDs] [Categories] [Keywords] [Associations] [Manufacturing] [Costs] [Attributes] [Features] [Facilities] [Locations]

[Inventory] [Suppliers] [Accounts] [Payment Types] [Quick Admin] [Variants] [Configurations] </B>

## .9.18.3 Table of Payment Method Types

### .9.18.3.1 Payment Method Type

This describes how the payments are made.

### .9.18.3.2 Purpose

Why the Payment would be made.

### .9.18.3.3 From Date and Time

When this Payment Method was established.

### .9.18.3.4 Thru Date (popup calendar)

When this Payment Method will expire, if ever.

### .9.18.3.5 Sequence Num

If there is a sequencing system in place, this is the Sequence Number for this item.

## .9.18.4 Tool to add Payment Method Types

### .9.18.4.1 Payment Method Type (drop-down box)

Select the Payment Method from the drop-down list of types. Choices might include: <B><P> Billing Account <br> Cash <br> Cash On Delivery <br> Certified Check <br> Company Account <br> Company Check <br> Credit Card <br> Electronic Funds Transfer <br> Gift Card <br> Gift Certificate <br> Money Order <br> Offline Payment <br> PayPal <br> Personal Check <br> WorldPay</B>

### .9.18.4.2 Purpose (drop-down box)

For what purpose will the Payment be made? Select from among these choices: <P><B> Component Price <br> Purchase/Initial <br> Recurring Charge <br> Usage Charge</B>

### .9.18.4.3 From Date (popup calendar)

Defaults to Now. Select a different Date and Time of effectivity if appropriate.

### .9.18.4.4 Thru Date (popup calendar)

If this Payment Method Type is going to expire for some reason in the future, indicate the expiration date here.

### .9.18.4.5 Sequence Num

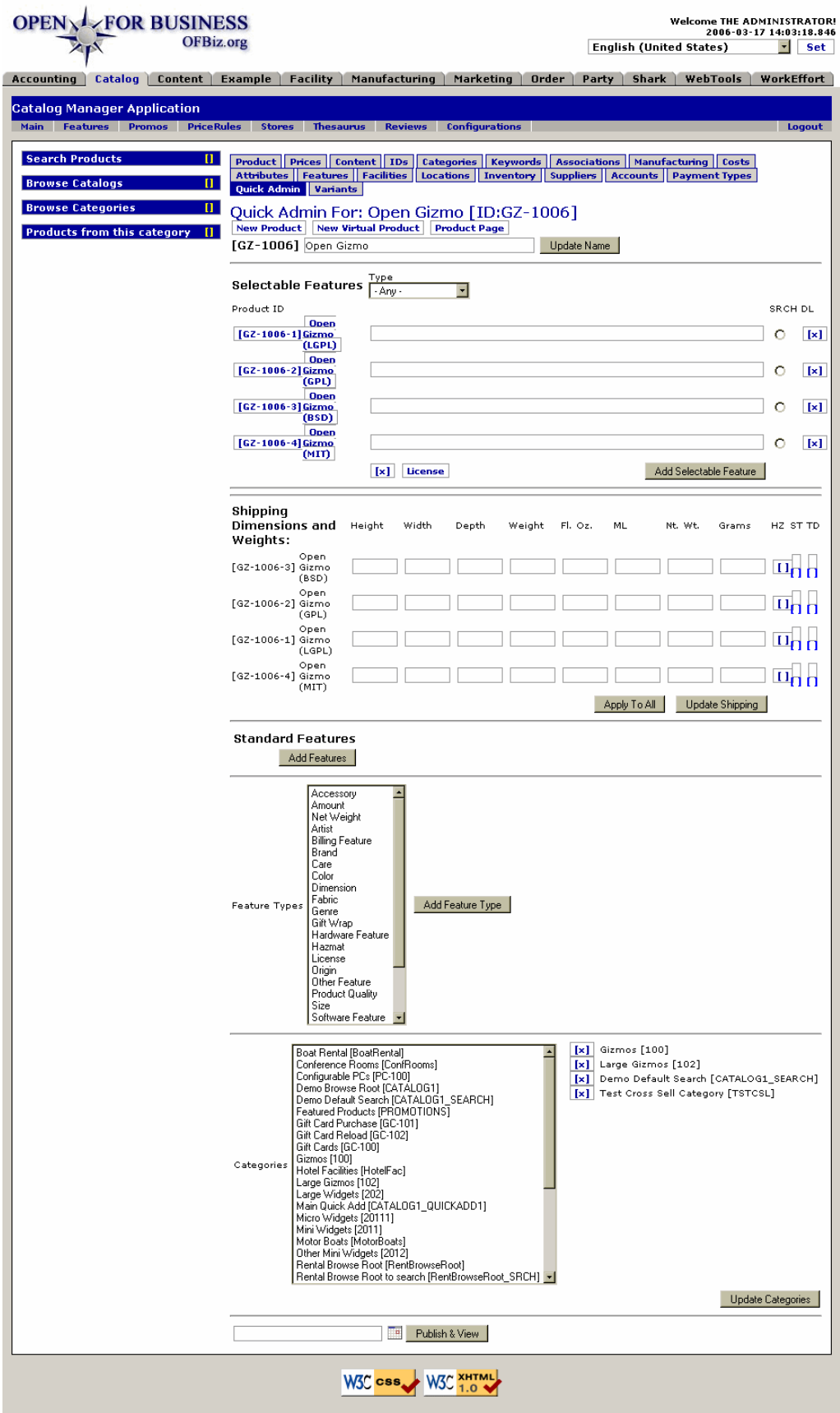
If a sequencing system is in place, enter the Sequence Number here.

# .9.19 Quick Admin

## .9.19.1 Discussion

This screen is for your convenience. Most of the tools presented here duplicate functions found at other screens. They are gathered in one screen here to give access to those common items you frequently need to update about your product. This screen could be modified by your programmer to include other (or fewer) functions.

## .9.19.2 EditProductQuickAdmin




Quick access is provided here to many of the commonly-revised elements of Product support, all gathered at one screen.

### .9.19.3 link buttons

[Update Name] [License] [Add Selectable Feature] [Apply to All] [Update Shipping] [Add Features] [Add Feature Type] [Update Categories] [Publish n View] [Remove From Site] [New Product] [New Virtual Product] [Product Page] <B> [Product] [Prices] [Content] [IDs] [Categories] [Keywords] [Associations] [Manufacturing] [Costs] [Attributes] [Features] [Facilities] [Locations] [Inventory] [Suppliers] [Accounts] [Payment Types] [Quick Admin] [Variants] [Configurations] </B>

### .9.19.4 Product Name

If you wish to change the Name of the Product, enter the new one in the box and click on [Update Name].

### .9.19.5 Selectable Features

If a Selectable Feature in the drop-down box can be applied to the Product, it will be added when the [Add Selectable Feature] button is clicked. Delete a Feature by clicking on the [x] link.

### .9.19.6 Shipping Dimensions and Weights

Add or revise any of the measurements given then click on [Update Shipping]. HZ, ST and TD are check boxes.

### .9.19.7 Standard Features

Existing features are listed; click on the [x] to remove. Select from the drop-down box then click on [Add Features] as needed.

### .9.19.8 Feature Types

Click on new Feature Types in the drop-down box, then click on [Add Feature Types]. Added Features will appear in the previous section above, where you can then click to Add Feature.

### .9.19.9 Categories

Click on new ones in the drop-down box, then click on the [Update Categories] command. To remove, click on the [x] box beside the Category in the list.

### .9.19.10 View/remove product page (popup calendar)

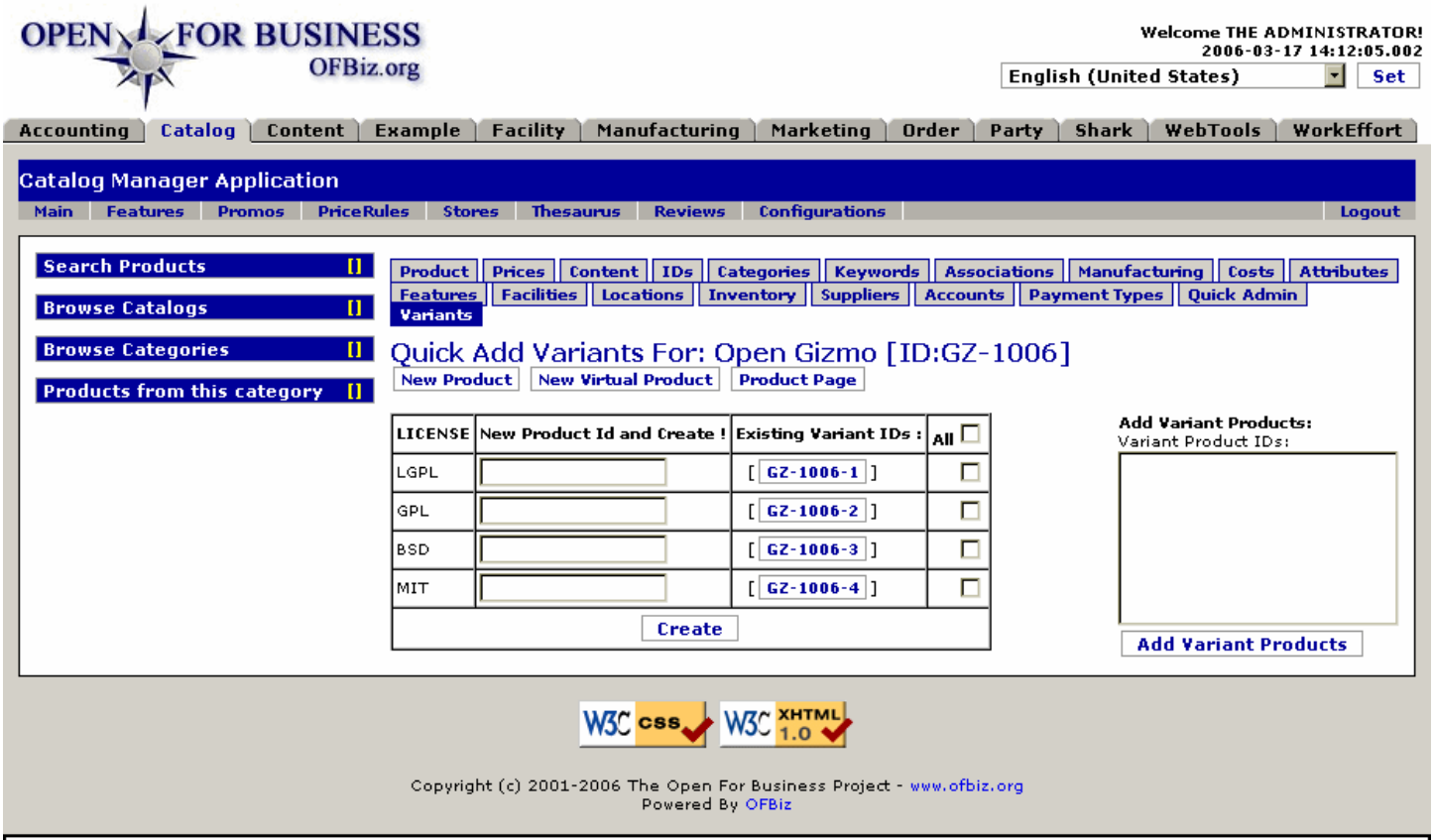
This calendar schedules a publication date and time for any new changes. Click on [Publish n View] to publish immediately and be taken to a new screen in the ecommerce site for this product.<p> After publication, the option changes. The calendar now schedules the date and time for the item to be removed from publication. To remove immediately, click on [Remove From Site].

## .9.20 Variants

### .9.20.1 Quick Create Virtual from Variants

On the Catalog Administration Main Page is a link [Quick Create Virtual from Variants]. You can enter a Product ID in the box then click on this link for a shortcut to creating Virtual products from existing Variants.

### .9.20.2 QuickAddVariants




Quickly establish new Variants for virtual products here; parameters of the Virtual Products determine what is displayed.

### .9.20.3 link buttons

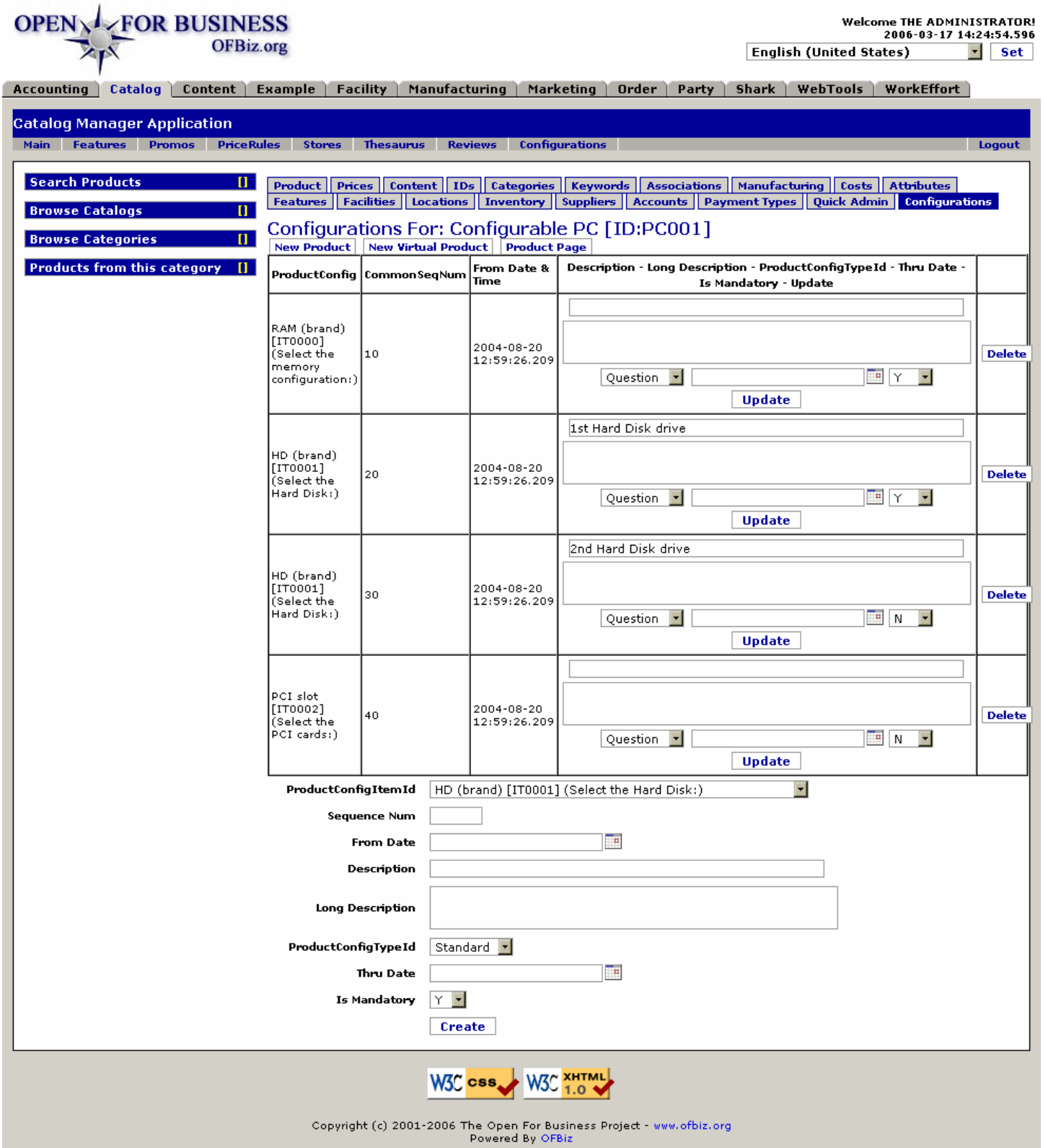
[Create] [Add Variant Products] [New Product] [New Virtual Product] [Product Page] <B> [Product] [Prices] [Content] [IDs] [Categories] [Keywords] [Associations] [Manufacturing] [Costs] [Attributes] [Features] [Facilities] [Locations] [Inventory] [Suppliers] [Accounts] [Payment Types] [Quick Admin] [Variants] [Configurations] </B>

### .9.20.4 Discussion

Options shown here are examples. Virtual products with 'Selectable' Application Type features can be quickly defined with Variant Features at this screen. These choices will be what appears to the customer when he makes his choices in the catalog. Options presented depend upon the product selected. <P> Labels and choices shown are determined by programming behind this screen. For example, instead of size and color, choices could be in text language for a document, along with its format (print, PDF file, cd, etc.)<p> When the Product is not identified as a Virtual Product to the system, the system might still work with you but you will get an error message: 'This product is not a virtual product, variants will not generally be used.'

## .9.21 Configurations

### .9.21.1 EditProductConfigs




Configuration details are gathered together for an aggregated product such as personal computer, automobile, trip planning, etc.

## .9.21.2 link buttons

[Update] [Delete] [Create] [New Product] [New Virtual Product] [Product Page] <B> [Product] [Prices] [Content] [IDs]

[Categories] [Keywords] [Associations] [Manufacturing] [Costs] [Attributes] [Features] [Facilities] [Locations] [Inventory] [Suppliers] [Accounts] [Payment Types] [Quick Admin] [Variants] [Configurations] </B>

## .9.21.3 Product Config

This item identifies which subordinate product is being configured here. The item must already exist and be associated with the Configurable Product before it will appear here.

## .9.21.4 CommonSeqNum

Sometimes the sequence of assembling a Configurable Product is significant. The number here identifies the heirarchy position.

## .9.21.5 From Date and Time

When was this particular Configuration established.

## .9.21.6 Configuration working section

### .9.21.6.1 Description

This short description is used when a name is needed for a numbered item.

### .9.21.6.2 Long Description

Information needed in making a decision about the item. Describe what it does, how it works, its advantages, related needs (controller, software, etc.), and why the customer should have it.

### .9.21.6.3 Product Config Type ID (drop-down box)

In this instance, the Config Type ID is establishing whether the item is a standard part or will the customer be asked (Question) whether he wants it.

### .9.21.6.4 Thru Date (popup calendar)

Expiration of validity for the Configuration, if any. Perhaps this particular option will not be offered after a certain date, for example.

### .9.21.6.5 Is Mandatory (Y/N)

Some components of a Configurable Product are needed or the product will not function, eg: memory for a PC. Others, such as a 2nd Hard Drive, would not be mandatory.

## .9.21.7 Tool to add configuration

### .9.21.7.1 Product Config Item ID (drop-down box)

Select from those Configuration Types already established.

### .9.21.7.2 Sequence Num

If there is a sequencing system, enter the Sequence number here.

### .9.21.7.3 From Date (popup calendar)

When was this configuration created or when will it be effective from.

### .9.21.7.4 Description

This short description is used when a descriptive name is needed to better identify a numbered item.

### .9.21.7.5 Long Description

Information needed in making a decision about the item. Describe what it does, how it works, its advantages, related needs (controller, software, etc.), and why the customer should have it.

### .9.21.7.6 Product Config Type ID (drop-down box)

Select from the drop-down box. In this instance, the Config Type ID is establishing whether the item is a standard part or will the customer be asked (Question) whether he wants it.

### .9.21.7.7 Thru Date (popup calendar)

Expiration of validity for the Configuration, if any.

### .9.21.7.8 Is Mandatory (Y/N)

Some components of a Configurable Product are needed or the product will not function, eg: memory for a PC. Others, such as a second Hard Drive, would not be mandatory.

# .10 Tab - Catalog Features

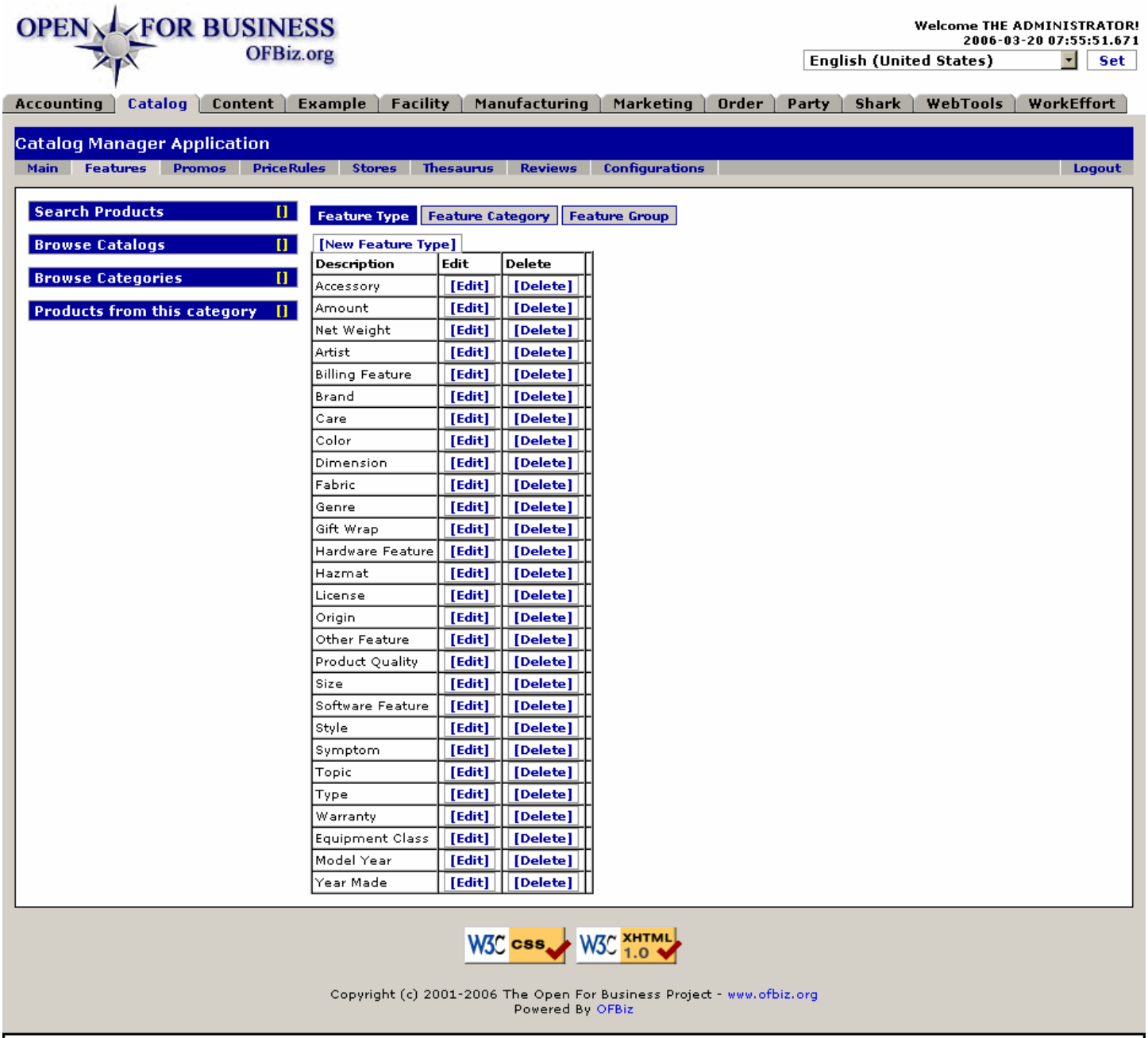
## .10.1 Discussion of Features

While there are tabs to screens for Feature Types, Feature Categories, and Feature Groups, to actually create a Feature you must first go to the tab <I> Feature Category. </I> From there, click on the [Edit] link. The details are shown under Feature Categories - Edit Feature, below.

## .10.2 Feature Types

### .10.2.1 Table of existing Feature Types

#### .10.2.1.1 EditFeatureTypes




From this table, identify existing Product Feature Types; click the [Edit] link or the [Delete] button, as needed.

### .10.2.1.2 link buttons

[NewFeatureType] [Edit] [Delete] <B> [Feature Type] [Feature Category] [Feature Group] </B>

### .10.2.1.3 Description

Actually more useful as a one-word Name of the Feature Type.

### .10.2.1.4 Edit column

Click on the [Edit] link in this column to be taken to the EditFeatureType screen, discussed below.

### .10.2.1.5 Delete column

If you click on the [Delete] button, the Feature Type will be gone.

### .10.2.2 NewFeatureType or Edit links

Either click on [NewFeatureType] to create a new type, or click on the associated [Edit] button to bring up this tool. When you click [Edit], the ID will already be populated.

#### .10.2.2.1 EditFeatureType-new

id:[11765] image:

Create a new Feature Type when you enter a new Type ID. Edit uses the same screen with the Type ID already populated.

#### .10.2.2.2 link buttons

[Update] <B> [Feature Types] [Feature Categories] [Feature Groups] </B>

#### .10.2.2.3 Product Feature Type ID

Should be short, but descriptive. Convention calls for ALL CAPS.

#### .10.2.2.4 Parent Type ID (drop-down box)

If this Type is part of a family of Product Feature types, enter the Parent ID here from the drop-down screen.

#### .10.2.2.5 Has Table (Y/N)

If there is an accompanying Table, select Y for Yes.

#### .10.2.2.6 Description

This would be more like a name, but generally longer than the ID. This can be more descriptive.

## .10.3 Feature Categories

### .10.3.1 EditFeatureCategories

Opening screen under the Features tab. Click on the ID or [Edit] link to edit, or create a new Category with the tool at the top.

## .10.3.2 link buttons

[Edit] [Update] [Create] <B> [Feature Type] [Feature Category] [Feature Group] </B>

## .10.3.3 Create a Product Feature Category

Creating a new feature immediately adds it to the table of features in the opening screen.

### .10.3.3.1 Description

Enter a brief, unique descriptor or phrase, preferably less than 30 characters total, which will accompany the system-generated Feature Category ID number.

### .10.3.3.2 Parent Category (drop-down box)

If this is part of a group of features that is under the umbrella of a Parent Category, use the drop-down box to find and assign its Parent.

## .10.3.4 Edit Feature with ID:

### .10.3.4.1 Edit or Create - Discussion

When you enter an existing Feature ID # and select [Edit], you will be taken to the Edit Feature screen.<P> If you click on [Edit] without having entered any number, you will reach the same screen but you can use it to create a new Feature. <P><B> Note:</B> This is different from the Edit Feature Categories screen. To edit the Feature Category, click on the ID number to the left in the table or on the [Edit] link to the right of the desired Feature Category.

### .10.3.4.2 Jump link

Enter the ID of an existing Feature and click [Edit] to go directly to the EditFeature screen, discussed further, below.

### .10.3.4.3 Table of Product Feature Categories

#### .10.3.4.3.1 ID

Click on this ID number to go to the EditFeature screen, below.

#### .10.3.4.3.2 Description

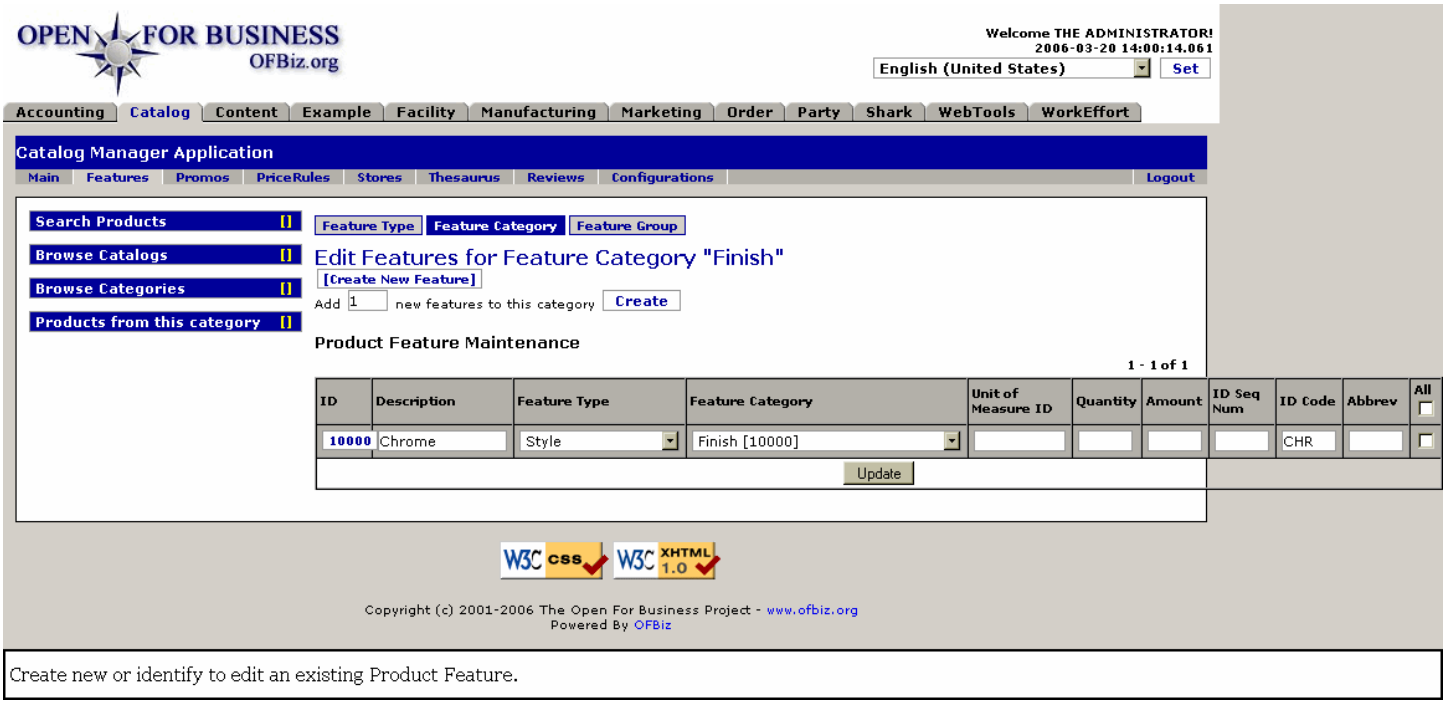
Generally the Name of the category. If you wish to change only this, enter the changes here then click on the [Update] button.

#### .10.3.4.3.3 Parent Category (drop-down box)

If this Product Category is the child of another, that is given here. If you change the Parent Category with the drop-down box, click on the [Update] link.

### .10.3.4.4 EditFeatureCategoryFeatures

id:[DOCCAT1377] image:




### .10.3.4.5 link buttons

[Update] [Create] [Create New Feature] <B> [Feature Type] [Feature Category] [Feature Group] </B>

### .10.3.4.6 Edit Features for Feature Category ...

#### .10.3.4.6.1 Add / Create new features line

Enter how many new features you wish to create, then press the [Create] link.

## .10.3.4.7 Table of Product Feature Categories

### .10.3.4.7.1 ID

Click on this ID number to go to the EditFeature screen. <br> Note: many of the items you can change here in this table, followed by clicking on the [Update] link.

### .10.3.4.7.2 Description

Actually used as the name for the feature is brief enough. This WILL appear in the catalog for the primary item as one of the selectable features.

### .10.3.4.7.3 Feature Type (drop-down box)

The originally assigned Feature Type appears here. This can be changed using the drop-down selection box.

### .10.3.4.7.4 Feature Category (drop-down box)

Originally assigned Category for this Feature is given. You can change this by making a different selection from the drop-down box.

### .10.3.4.7.5 Unit of Measure ID

If something other than 'Each,' the Unit of Measure should be given here.

### .10.3.4.7.6 Amount

How much of the Feature is included, when appropriate.

### .10.3.4.7.7 ID Seq Num

If a sequencing system is in place, the sequence for this Feature should be given here.

### .10.3.4.7.8 ID Code

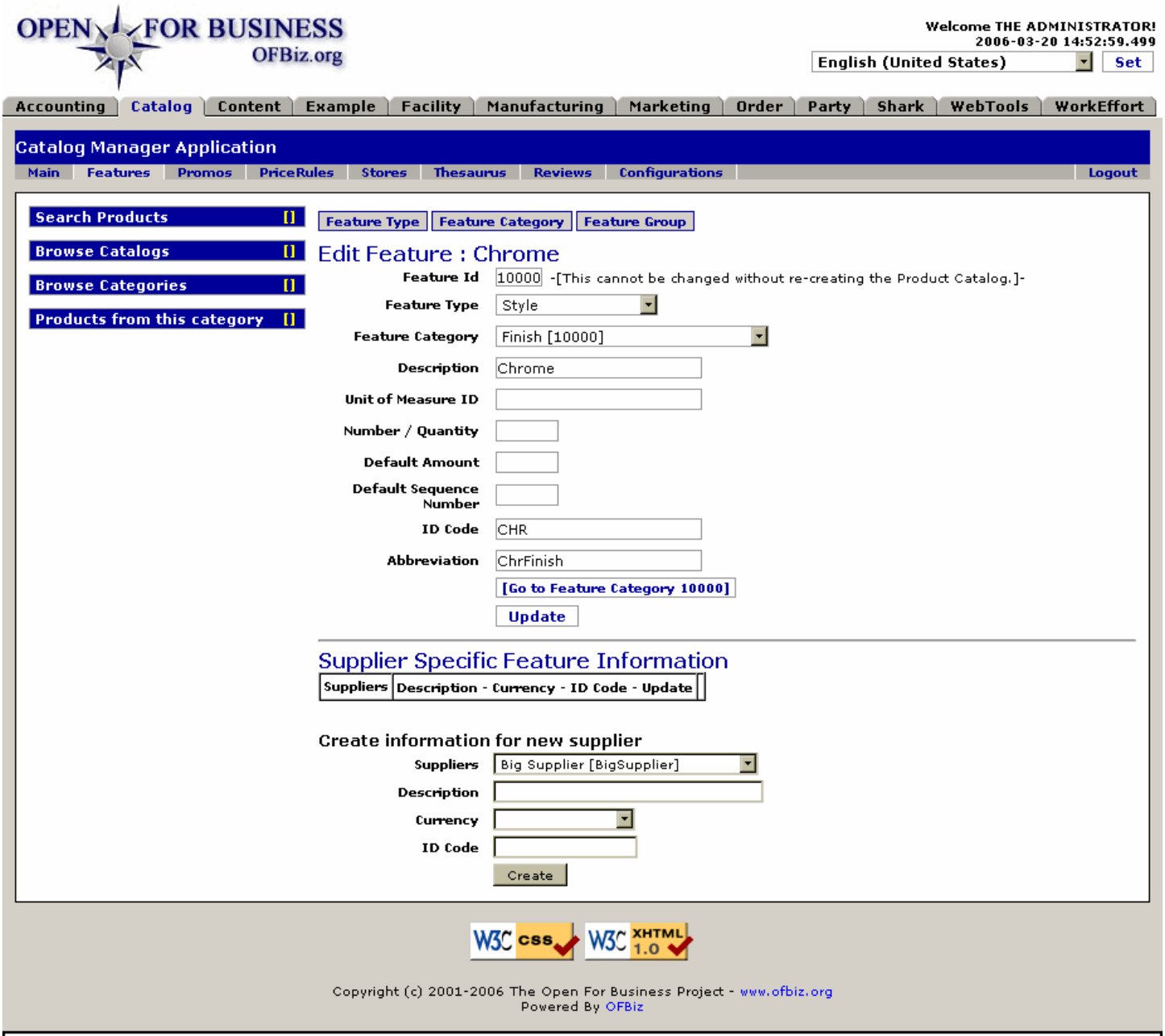
An assigned Code to identify this Feature in transactions will be seen here.

### .10.3.4.7.9 Abbrev

If the Description is too long to be used for this Feature, an abbreviation might be developed; that can be recorded here.

## .10.3.4.8 Edit Feature screen

### .10.3.4.8.1 EditFeature




Come to this screen to edit the Feature. You can also find Supplier info and establish new Suppliers here.

### .10.3.4.8.2 link buttons

[Go to Feature Category ...] [Update] [Create] <B> [Feature Type] [Feature Category] [Feature Group] </B>

### .10.3.4.8.3 Edit Feature: ... section

#### .10.3.4.8.3.1 Feature ID

The system-assigned ID number for this Feature. As it says, 'This cannot be changed without re-creating the Product Catalog.' Actually that should say, '... without recreating the Category Feature.' You can change practically anything else about the Category Feature, either here or in the table at the previous screen.

#### .10.3.4.8.3.2 Feature Type (drop-down box)

Originally assigned Feature Type can be changed here with the drop-down box selections.

#### .10.3.4.8.3.3 Feature Category (drop-down box)

Originally assigned Feature Category can be changed here with the drop-down box selections.

#### .10.3.4.8.3.4 Description

Best kept short; this will appear in the Catalog and is often used in place of a name.

#### .10.3.4.8.3.5 Unit of Measure ID

If other than 'each,' the Unit of Measure goes here.

#### .10.3.4.8.3.6 Number / Quantity

How many are involved? That number or quantity goes here.

#### .10.3.4.8.3.7 Default Amount

The price for this Feature assuming it is not covered elsewhere as part of the Parent or in some other way.

#### .10.3.4.8.3.8 Default Sequence Number

If not overridden by a Parent's Sequence Number or some other sequencing system, this is the anticipated Sequence Number.

#### .10.3.4.8.3.9 ID Code

For transaction tracking, Features may be assigned an ID Code; enter that here.

#### .10.3.4.8.3.10 Abbreviation

If the description is too long, an abbreviation can be assigned to it here.

### .10.3.4.8.4 Supplier Specific Feature Information

#### .10.3.4.8.4.1 Table of Suppliers' data

Established Suppliers for this Category Feature can be viewed in the table. Changes can be made in the table if you will click the [Update] link in the RH column. Information is shown under these categories: <br> <B> Suppliers <br> Description <br> Currency <br> ID Code </B> <p. See explanations for these fields in the topics

#### .10.3.4.8.4.2 Create information for new supplier

##### .10.3.4.8.4.2.1 Suppliers (drop-down box)

A vendor able and willing to provide the components for the Category Feature. Must already be identified under the Party Manager.

##### .10.3.4.8.4.2.2 Description

What the Supplier calls the Category Feature it is going to provide.

##### .10.3.4.8.4.2.3 Currency (drop-down box)

The national currency to be used with this Supplier. Select from the drop-down box.

##### .10.3.4.8.4.2.4 ID Code

The ID Code for the Feature being obtained from this Supplier.

## .10.4 Feature Groups

The set of Product Feature Groups displayed here will be constrained by the specific Catalog, Categories and/or Products previously selected.

### .10.4.1 EditFeatureGroups

Product Feature Groups are created, updated and selected for editing from this screen.

## .10.4.2 link buttons

[Edit] [Update] [Create] <B> [Feature Type] [Feature Category] [Feature Group] </B>

## .10.4.3 Table of Groups

### .10.4.3.1 ID

Links to Edit Feature Group Applications screen.

### .10.4.3.2 Description

This Description of the Group can be changed here in the table. Click [Update] when finished.

## .10.4.4 Create a Product Feature Group

### .10.4.4.1 Description

Give the feature group a name here. When you click upon the [Create] button, the group is created in name and ID number only. Return to the table above and Edit the new group to establish details.

## .10.4.5 Edit Product Feature Group

### .10.4.5.1 EditFeatureGroupAppls

Contents of the Feature Group can be removed, applied or newly created from this screen.

## .10.4.5.2 link buttons

[Create] [Remove] [Continue] <B>[Feature Type] [Feature Category] [Feature Group] </B>

## .10.4.5.3 Table of Feature Group Application IDs

### .10.4.5.3.1 ID

The identification number for this feature.

### .10.4.5.3.2 Feature

As originally entered as the description or name of the Feature.

### .10.4.5.3.3 Type

The type of a feature.

### .10.4.5.3.4 Category

The Category of features from which this was selected.

## .10.4.5.4 Quick Apply Product Feature

Enter the ID number of an existing Product Feature, such as 9003 for the 4-wheel Widget feature, and it will be applied after clicking on the [Create] link.

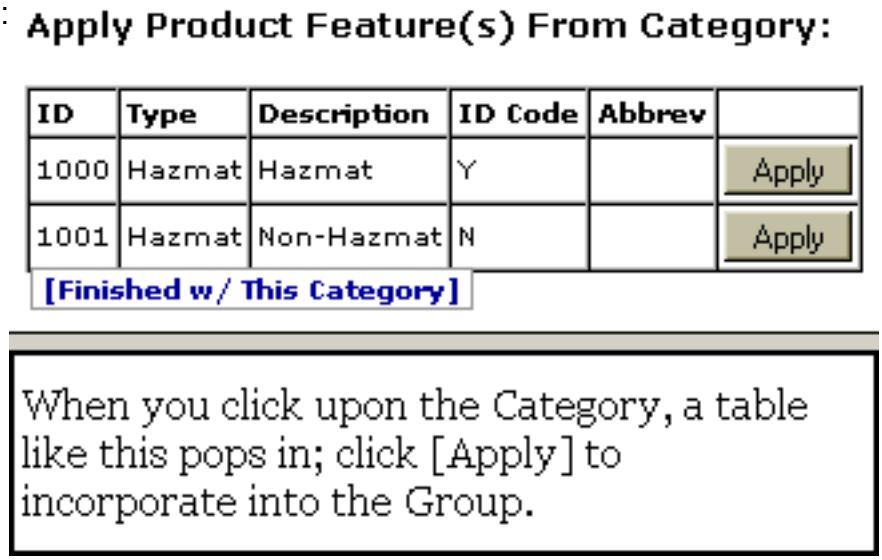
## .10.4.5.5 Apply Product Feature(s) From Category

### .10.4.5.5.1 Discussion

Select a Category from the Feature Category drop-down box, click on [Continue]. A table populated with the Features from that Category will appear. Select the desired Feature from the table and it will be applied to the Feature Group. <p> When finished with the Category, click on the link [Finished w/ This Category] and you can select another Category from which to choose.

### .10.4.5.5.2 Continue

id:[11797] image:



# .11 Tab - Catalog Promos

## .11.1 FindProductPromo

id:[DOCCAT1439] image:

Table of existing Product Promotions; select from here to view or edit. Note links to both Promos and Products.

## .11.2 link buttons

[Create New ProductPromo] [View Manual and Imported (toggle)] [Edit]

## .11.3 Table of current promotions

### .11.3.1 Promo Name (ID)

Click on either the Name/ID combination here or on the [Edit] link to the right to be taken to the EditProductPromo screen for this promotion.

### .11.3.2 Promo Text

The explanation of the Promotion as it will appear on the ecommerce screens or the Order Entry screens of the Order Manager. Should be clear and complete enough for both your staff and your customers to understand.

### .11.3.3 Req. Code?

This Yes / No response indicates which flag is set. Does a Promotional Code need be entered before this Promotion can be effected for a customer? If Y, the customer will need to enter a Promotion Code to benefit from the Promotion. Otherwise, it could be automatically imposed if the criteria are met as set out in the text.

### .11.3.4 Created

Date and Time when the Promotion was created. <P> NOTE: the examples which come with OFBiz are old but they can serve as examples. They can not be modified and used effectively in your installation. Create new promotions matching the characteristics that you might like from these examples.

## .11.4 Edit Promotion Code

### .11.4.1 PromotionCode-Edit

Enter a Promo Code in the upper LH corner of the opening screen and you are brought directly to the Codes tab. See below.

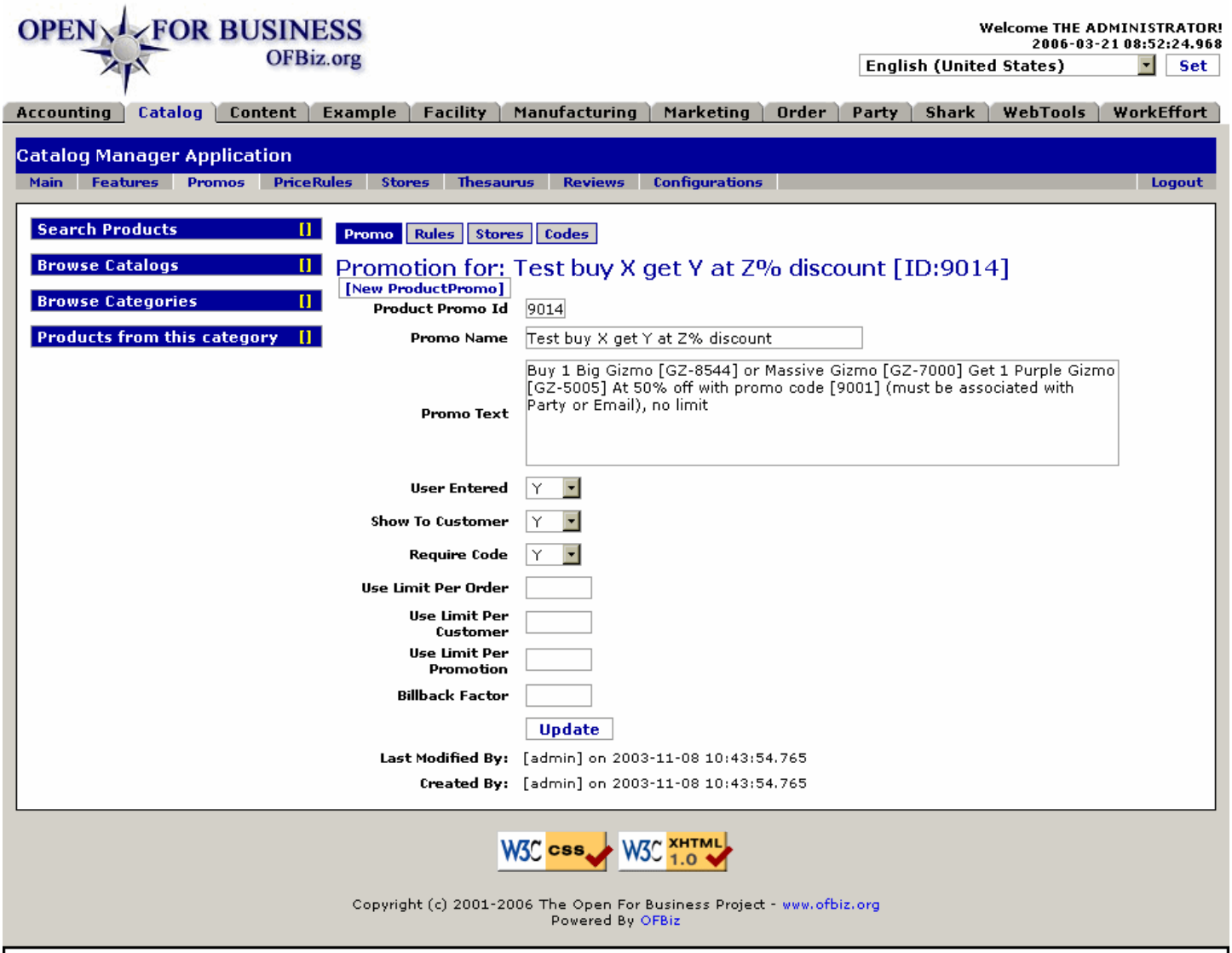
## .11.5 Editing tabs

Click on the Promo Name ID or the associated [Edit] link to see further details or to make changes to the promotion.

### .11.5.1 Edit Promotion

Links from [Edit] or from Promo Name [ID].

#### .11.5.1.1 EditProductPromo




Edit the details of a selected Promotion from this screen and under the other tabs.

### .11.5.1.2 link buttons

[New Product Promo] [Update] <B> [Promo] [Rules] [Stores] [Codes] </B>

### .11.5.1.3 Product Promo ID

The ID number assigned by the system when this Promotion was created.

### .11.5.1.4 Promo Name

Name by which this Promotion is known within your organization. Will also be viewed by the ecommerce customer.

### .11.5.1.5 Promo Text

This is the text that appears on the ecommerce screen or the Order Entry screens of the Order Manager.

### .11.5.1.6 User Entered (Y/N)

Does the User have to enter this Promotion information? Meaning, does he have to place an order for a second product to take advantage of the promotion?

### .11.5.1.7 Show to Customer (Y/N)

Is the Promotion shown to the customer on the Product sheet or in the ecommerce pages?

#### .11.5.1.8 Require Code (Y/N)

Does a Promotional Code need be entered before this Promotion can be effected for a customer?

#### .11.5.1.9 Use Limit Per Order

Within one customer Order, how many instances may the customer have to use this Promotion? <P> For example, if he get a free Micro Widget with the purchase of any kind of Gizmo, does he get one free with the purchase of each different Gizmo or just the first?

#### .11.5.1.10 Use Limit Per Customer

How many times may a customer benefit from this Promotion?<P> For example, if he gets a free Widget with this Order, then orders a Gizmo tomorrow, will he (as a Party ID) be allowed to get another or is this limited to 1 time or 4 times or how many?

#### .11.5.1.11 Use Limit Per Promotion

How many promotional give-a-ways or discounts will be accepted for the life of this promotion? <P> For example, if you are giving away free Widgets with the Purchase of Gizmos, and you have 100 Gizmos to sell but only 20 widgets to give away, you will need to enter '20' here, and state in the Promotion, 'First 20 sales only.'

#### .11.5.1.12 Billback Factor

When the Promotion is underwritten or subsidized by a Supplier, the cost of the Promotion can be partly or fully covered by this source. Here is where the code to identify the Billiback is entered.

#### .11.5.1.13 Last Modified By:

Includes title, date and time.

#### .11.5.1.14 Created By

Party that originally created this Promotion.

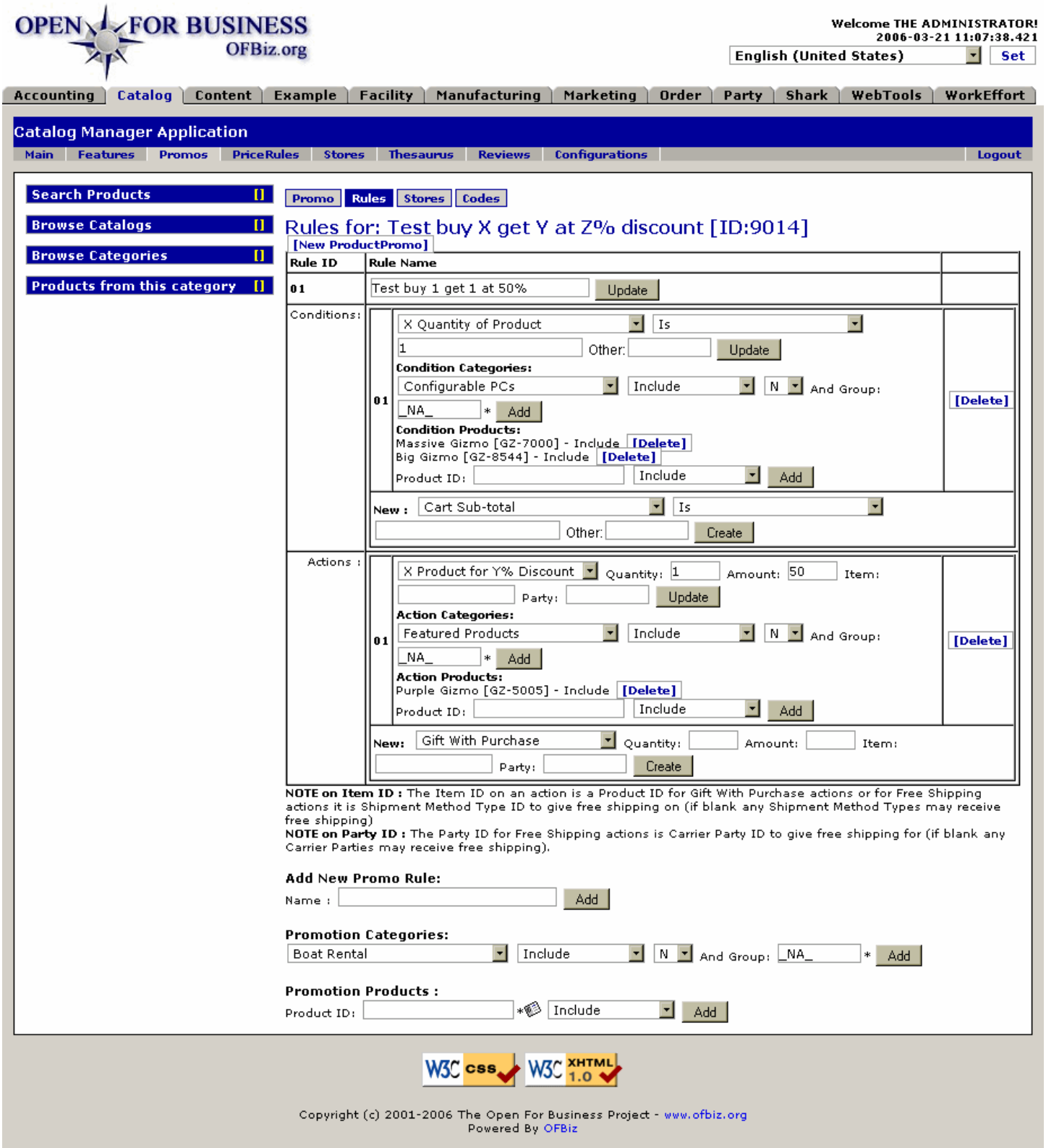
### .11.5.2 Edit Rules

Rules for the promotion. Powerful engine creates the relationships required to properly implement the Rules for processing the promised promotional discounts.

#### .11.5.2.1 Rules discussion

Rules for promotions are used to determine what actions should be taken in the promotion. Each promotion can have multiple rules, and each rule can have multiple conditions and actions. If a promotion had multiple rules, they would all be checked in sequence, and the rules whose conditions were true will be activated. This is especially helpful for complicated promotions that have multiple offers.

#### .11.5.2.2 EditProductPromoRules




Tool for establishing the Conditions and Actions for Promotions; add other features. Choices shown are only typical.

## .11.5.2.3 link buttons

[Update] [Add] [Create] [Delete] [New Product Promo] <B> [Promo] [Rules] [Stores] [Codes] </B>

### .11.5.2.4 Rule ID

Typically a 2-digit number, this is created by the system and cannot be changed.

### .11.5.2.5 Rule Name

How the Rule is known within the Promotion. This can be modified; click [Update] when finished.

### .11.5.2.6 Conditions

#### .11.5.2.6.1 Relative values

If these values exist (as established in the drop-down boxes and the filled-in numbers), then the action will be considered, subject to the following Condition Categories.

#### .11.5.2.6.2 Condition Categories (drop-down box)

Select a Condition Category from the drop-down box (if needed), specify whether to Include, Exclude, or Always Include from that drop-down box, confirming with a Y or N choice and naming the applicable Group. If there is no Group named (_NA_), then the Condition will not be applied.

#### .11.5.2.6.3 Condition Products

If specific Products are to be Included, Excluded or Always Included, identify them here, and click on [Add].

#### .11.5.2.6.4 New condition

Introduce a new Conditions rule here by selecting conditions, terms and values, then clicking [Create]. The Conditions sections will stack within this section of the Rule Name column, each with their own two-digit ID and Name; you can edit and add Products and Categories after the new Condition is created.

### .11.5.2.7 Actions

#### .11.5.2.7.1 Relative terms

Who will benefit from this promotion is established in the first couple of lines here, using the drop-down box. Then the value of the action is stated for Quantity, Item, Amount and/or Party.

#### .11.5.2.7.2 Action Categories

Select an Action Category from the drop-down box (if needed), specify whether to Include, Exclude, or Always Include from that Category, confirming with a Y or N choice and naming the applicable Group. If there is no Group named (_NA_), then the Action Category will not be applied in this Action.

#### .11.5.2.7.3 Action Products

If specific Products are to be Included, Excluded or Always Included, identify them here, and click on [Add].

#### .11.5.2.7.4 New Actions rule

Use the drop-down box to select type of action. Introduce a new Action item here by selecting Quantity, Items, Amount and Party, then clicking [Create]. The Actions sections will stack within this section of the Rule Name column, each with their own two-digit ID and Name; you can edit and add Products and Categories after the new Condition is created.

### .11.5.2.8 Add New Promo Rule

#### .11.5.2.8.1 Name:

Enter a name for the new Promotion rule, click [Add], and the table will include the new rule with spaces for editing as discussed above.

### .11.5.2.9 Promotion Categories

#### .11.5.2.9.1 Categories (drop-down box)

Any existing Promotion Category can be selected from the drop-down box.

#### .11.5.2.9.2 Include/Exclude (drop-down box)

Indicate whether the Promotion Category is to be Included, Excluded or Always Included in the new Rule.

#### .11.5.2.9.3 Yes/No (Y/N)

Confirm Yes or No.

#### .11.5.2.9.4 Group * (drop-down box)

Group must be named to add the Category; if _NA_, will not affect the Rule.

### .11.5.2.10 Promotion Products

#### .11.5.2.10.1 Product ID * (popup search)

Product must be specified before it can be added. Use the popup search tool to locate.

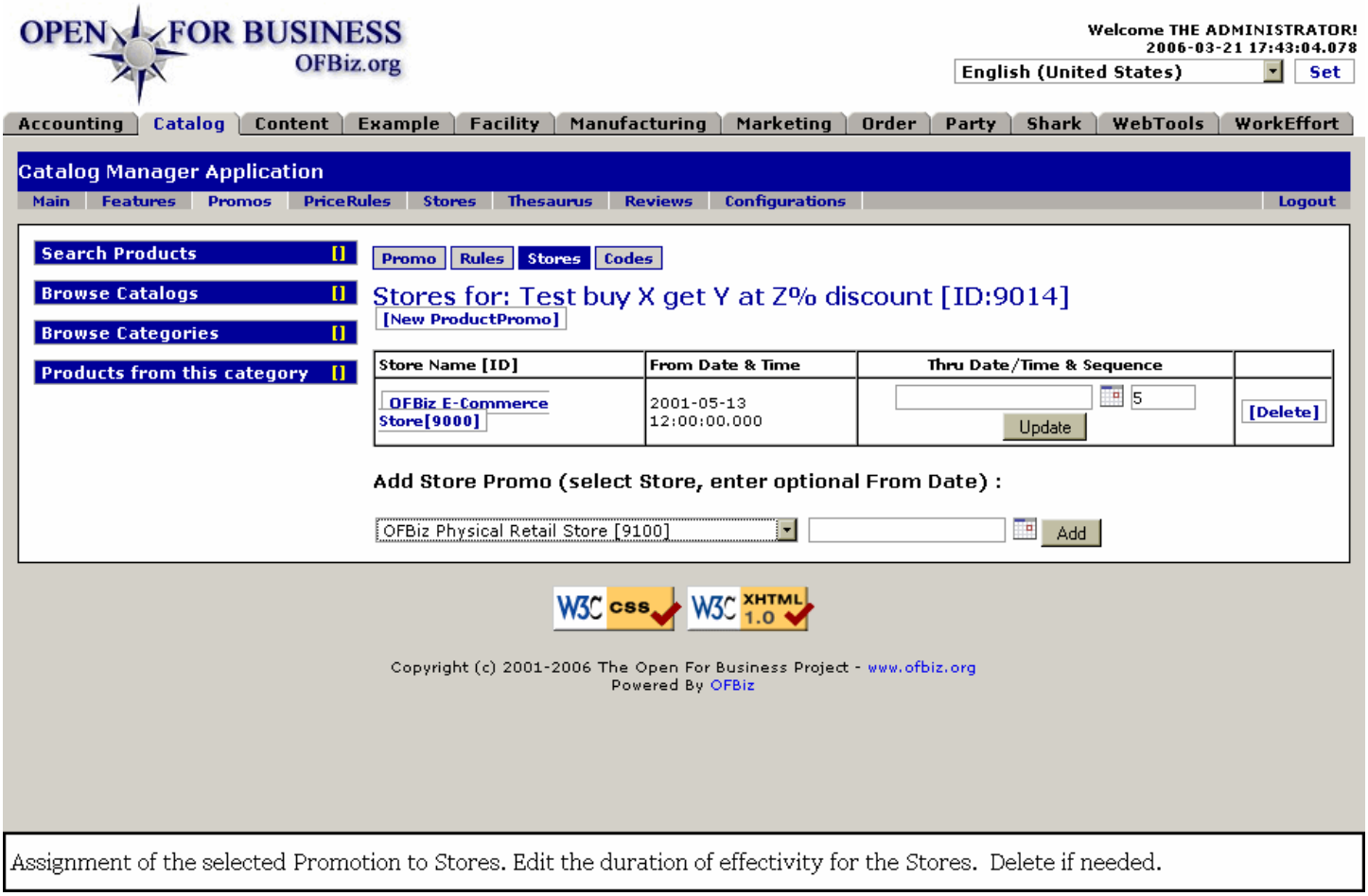
#### .11.5.2.10.2 Include/Exclude (drop-down box)

The named Product can be Included, Excluded or Always Included.

## .11.5.3 Stores (for promotion)

### .11.5.3.1 EditProductPromoStores

id:[DOCCAT1478] image:




Assignment of the selected Promotion to Stores. Edit the duration of effectivity for the Stores. Delete if needed.

### .11.5.3.2 link buttons

[Update] [Add] [Delete] [New Product Promo] <B> [Promo] [Rules] [Stores] [Codes] </B>

### .11.5.3.3 Table of stores

#### .11.5.3.3.1 Store Name (ID)

ID with link to Catalog - Stores tab, Store sub-tab for information and editing.

#### .11.5.3.3.2 From Date and Time

When the Promotion was assigned to this Store or when it was made effective.

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

Expire an assignment to this Store by entering the expiration date here. If left blank, will remain indefinitely.

#### .11.5.3.3.4 Sequence

If a sequencing system is in place, enter or edit the Sequence number here.

### .11.5.3.4 Add Store Promo

#### .11.5.3.4.1 Store (drop-down box)

Select other Stores to be included with the Promotion from the drop-down box.

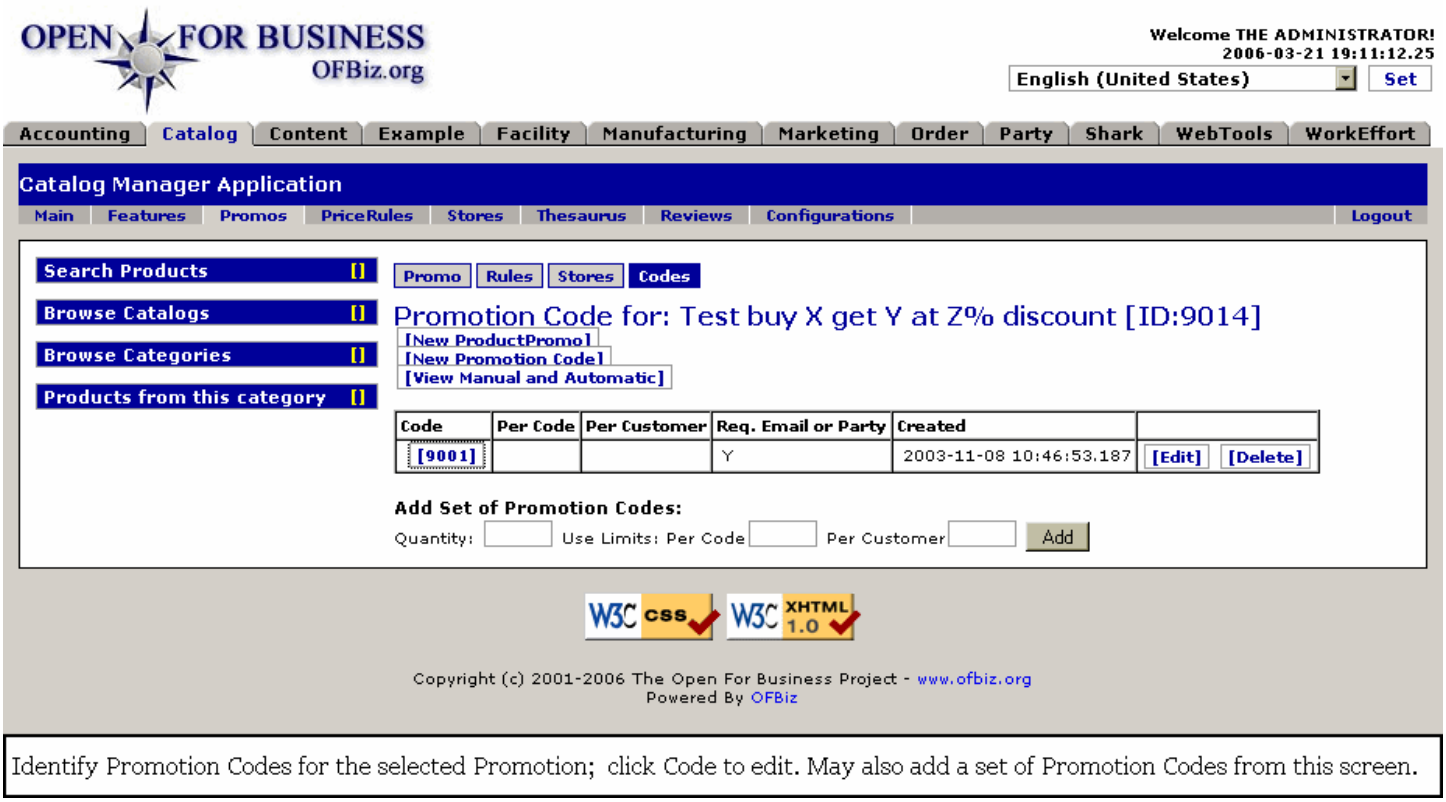
#### .11.5.3.4.2 Optional From Date (popup calendar)

Date will default to Now unless a future date is selected.

## .11.5.4 Codes

### .11.5.4.1 FindProductPromoCode

id:[DOCCAT1489] image:




Identify Promotion Codes for the selected Promotion; click Code to edit. May also add a set of Promotion Codes from this screen.

### .11.5.4.2 link buttons

[New Product Promo] [New Promotion Code] [View Manual and Automatic] [Edit] [Delete] [Add] <B>[Promo] [Rules]

[Stores] [Codes]</B>

## .11.5.4.3 Table of existing Promotion Codes

### .11.5.4.3.1 Code

The Code number assigned by the system when it was created.

### .11.5.4.3.2 Per Code

How many instances of sales can this Code be used? If tied with a Product, you should not exceed the amount of inventory or include a notice that the Promo applies to the first X number of sales only.

### .11.5.4.3.3 Per Customer

How many times can the customer use this Promotion Code?

### .11.5.4.3.4 Req. Email or Party

If the 'Require Email or Party' flag is set to N (No), any email addresses or parties listed will be ignored. To require an email address or party from these lists, set the flag to Y (Yes).

### .11.5.4.3.5 Created

Date this Promotion Code was created or made effective.

## .11.5.4.4 Add Set of Promotion Codes

### .11.5.4.4.1 Quantity

How many new Codes do you wish to add?

### .11.5.4.4.2 Use Limits Per Code

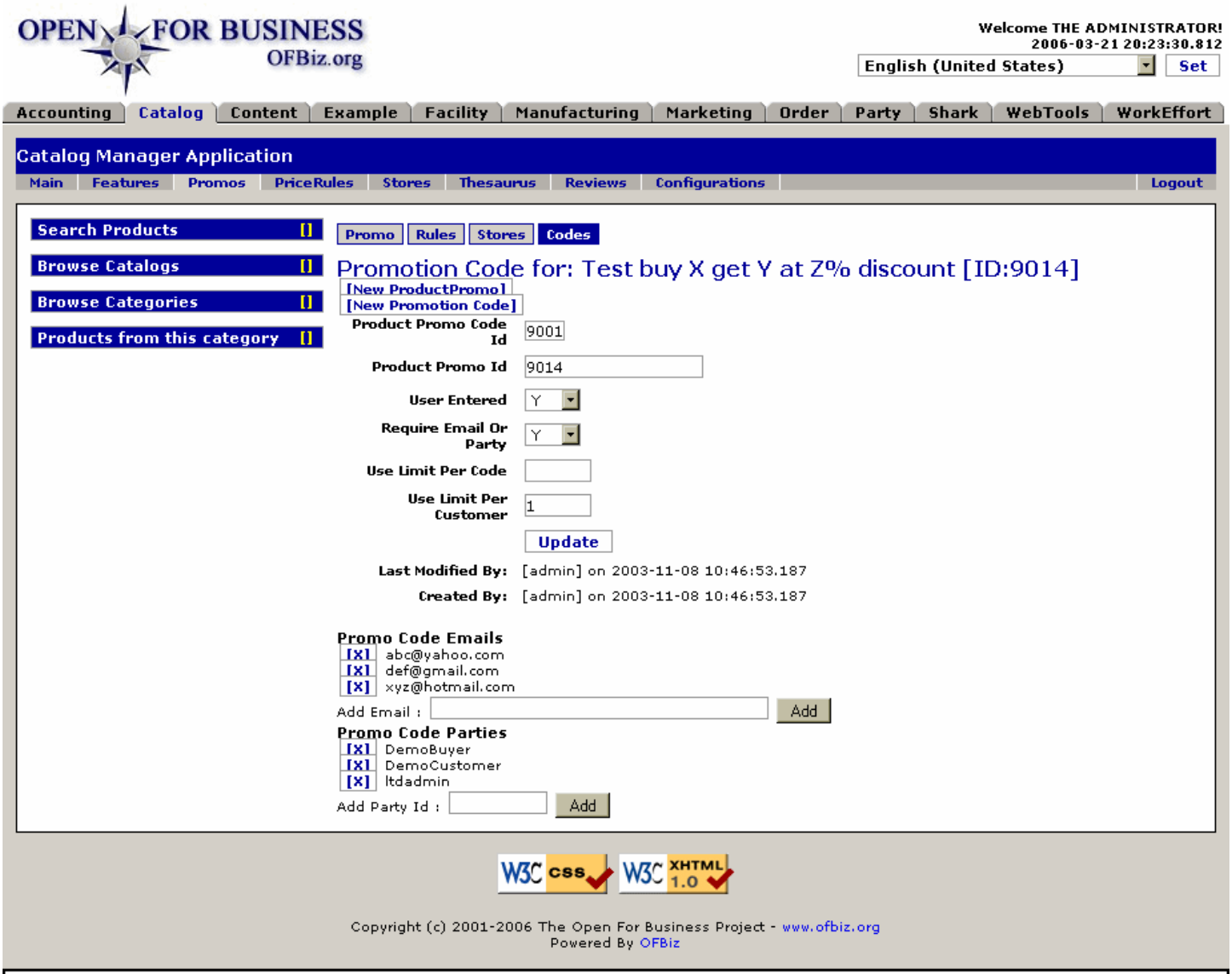
How many times can the new Code be used before it is exhausted?

### .11.5.4.4.3 Use Limits Per Customer

How many times can one customer use the Promotion Code?

## .11.5.4.5 Edit Promotion Code

### .11.5.4.5.1 EditProductPromoCode




Edit the Promotion Code and add details from this screen. Click [X] to remove party.

### .11.5.4.5.2 link buttons

[New ProductPromo] [New Promotion Code] [Add] [Update] <B> [Promo] [Rules] [Stores] [Codes] </B>

### .11.5.4.5.3 Product Promo Code ID

A promotion or coupon code which a shopper can use. This number is created by the system and cannot be changed.

### .11.5.4.5.4 Product Promo ID

The ID code of the promotion for which this code is applicable.

### .11.5.4.5.5 User Entered (Y/N)

Specifies whether this was a user entered promotion or, if N, implies it was an automatically created promotion code. This is to help when there are a lot of auto-generated codes that you don't want to have to see when manually maintaining codes.

### .11.5.4.5.6 Require Email or Party (Y/N)

Determines if the user needs to be on a specific list of email addresses of party identification numbers to be able

to use the promotion code. At the bottom of the page are lists of active email addresses and party IDs and spaces for entering email addresses and party IDs. Clicking on the 'X' next to an email address or party ID removes it from the promotion.

#### .11.5.4.5.7 Use Limit Per Code

Controls the number of times the given coupon code can be used. Limited stock or controlled distribution of coupons would drive this restriction.

#### .11.5.4.5.8 Use Limit Per Customer

Controls the number of times the given coupon code can be used by a specific Party ID.

#### .11.5.4.5.9 Last Modified by

Last Modified by Name on Date at Time.

#### .11.5.4.5.10 Created by

Created by Name on Date at Time.

#### .11.5.4.5.11 Promo Code Emails

.11.5.4.5.11.1 Existing email list

Not shown unless they exist.

.11.5.4.5.11.2 Add Email:

Enter an email address and press [Add].

#### .11.5.4.5.12 Promo Code Parties

.11.5.4.5.12.1 Existing code parties

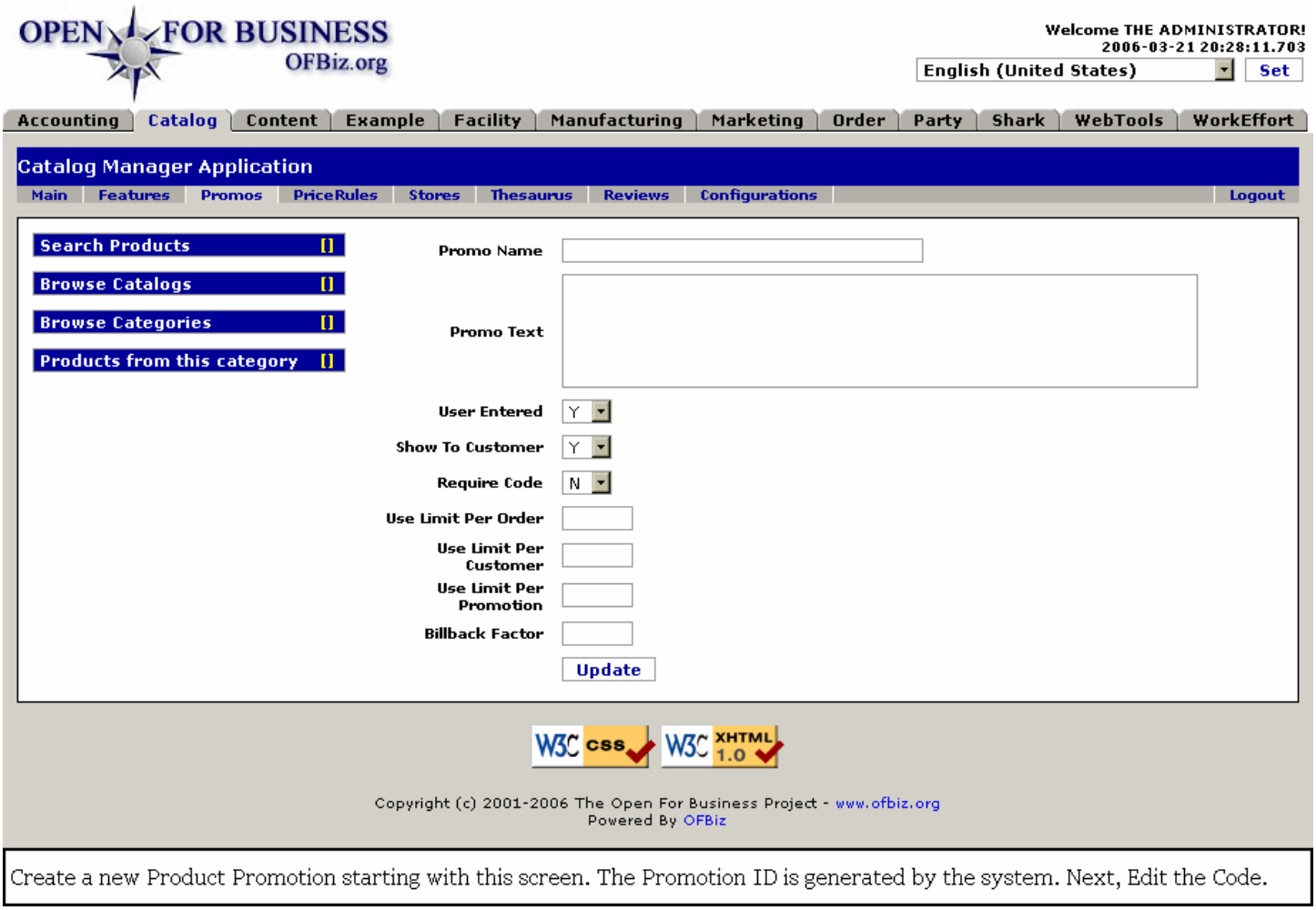
Not shown unless they exist.

.11.5.4.5.12.2 Add Party ID:

Enter a Party ID to identify those Parties associated with this Promotion Code.

## .11.6 Create New Product Promo

### .11.6.1 EditProductPromo-New




Create a new Product Promotion starting with this screen. The Promotion ID is generated by the system. Next, Edit the Code.

## .11.6.2 link buttons

[Update]

## .11.6.3 Promo Name

The Name is independent of the assigned Promo ID and can be used over and over. This will appear on the ecommerce site and the product order webscreen. Needs to be succinct yet descriptive.

## .11.6.4 Promo Text

What is said on the Product Page or in the ecommerce presentation screens about this Promotion.

## .11.6.5 User Entered (Y/N)

A way to flag promotions as 'user entered' for cases where automated promotions are used. When promotions are listed by default it doesn't show promotions where User Entered is N unless they click on the link to show all promotions.

## .11.6.6 Show To Customer (Y/N)

Controls whether this will be shown to customers automatically when they are viewing their shopping cart or checking out, or whether this promotion is kept hidden and requires the customer to find out about it some other way.

## .11.6.7 Require Code (Y/N)

Denotes whether the promotion requires the use of a special coupon code or is applicable to any user who qualifies under its rules.

## .11.6.8 Use Limit Per Order

These boxes allow you to specify how many times the promotion can be used, either per order, customer, or promotion. You can specify how many times the promotion can be applied, either for a specific order, specific customer, or for the life the promotion. Be sure to specify at least one of these. Otherwise, Open for Business will keep applying the promotion without limits on the same order.

## .11.6.9 Use Limit Per Customer

How many times may a customer benefit from this Promotion?<P> For example, if he gets a free Widget with this Order, then orders a Gizmo tomorrow, will he (as a Party ID) be allowed to get another or is this limited to 1 time or 4 times or how many?

## .11.6.10 Use Limit Per Promotion

How many instances of this Promotion are allowable? If this is a flat discount, for example, there probably needs not be a limit during the run of the Promotion. On the other hand, if there is a give-away item, the instances should be limited to the number of such items on hand.

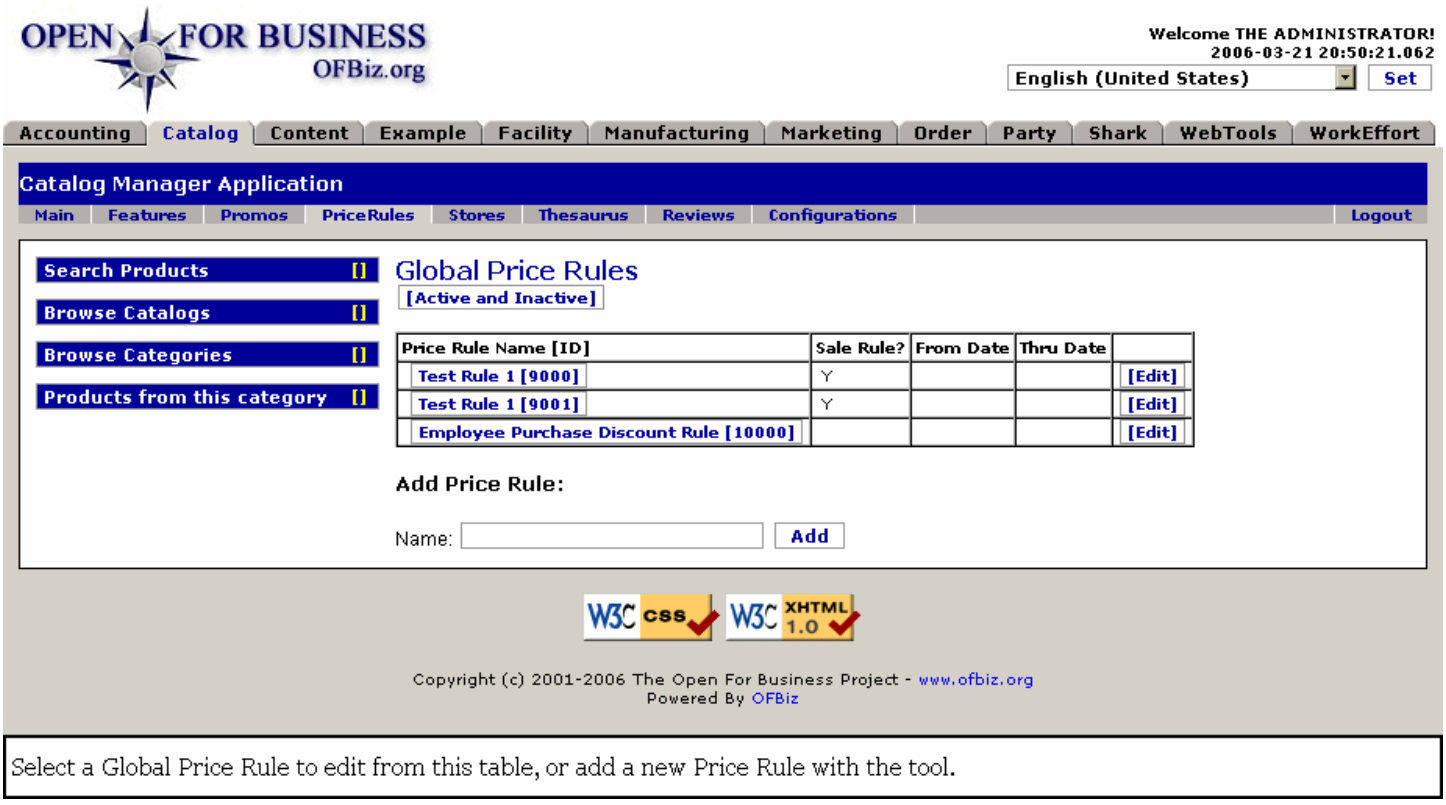
## .11.6.11 Billback Factor

Used to track how much of the discount offered for the promotion should be billed back to the manufacturer or distributor that is sponsoring or underwriting the promotion.

# .12 Tab - Catalog PriceRules

## .12.1 FindProductPriceRules

id:[DOCCAT1526] image:




Select a Global Price Rule to edit from this table, or add a new Price Rule with the tool.

## .12.2 link buttons

[Active and Inactive (toggle)] [Edit] [Add]

## .12.3 General discussion

Price Rules tab can be seen on the top nav bar. If you select the example 'test rule', this rule sets all items in the promotions category 20% off the list price and marks the item as 'On Sale!' <p>Each rule consists of a set of conditions and a set of actions. The actions only run if all conditions evaluate as true. <p>There are many options for conditions. The conditions will limit which products and which people get which prices so, if I wanted to give 'admin' 50% off all items in promotions, I would create a new PriceRule and then set the conditions to be that Party = Admin and update it and then set Percent of List Price to -50. Don't forget the minus sign.

### .12.3.1 Processes

#### .12.3.1.1 Cookie

The cookie remembers users so when that, when they return their prices are already established even before they login. Without the cookie they are not 'known' so they do not qualify for the discount, but rather get the default price.

#### .12.3.1.2 Conditions

The conditions can be as general as which website they are on, or as detailed as which product we are working with. There are several different actions which can be used, but <B>all</B> of them are applied, <I>in order</I> (sequentially), so it can be a little dangerous.

#### .12.3.1.3 Flat Amount Modify

Flat amount modify will modify the list price (all the modifiers modify the List Price) by a dollar amount. If you try this: put in '-20' this would give 20.00 off the list price. Notice the minus sign -- without it the rule would raise the price by 20.00. Flat amount override will change the price to the amount in the box.

#### .12.3.1.4 Comparing 'Override' and 'Modify'

The difference between override and modify is that override will set the price to the value in the box, modify will alter the price by the amount in the box. Override 20 would make the price exactly 20.00; modify -20 would take 20.00 off the list price.

## .12.4 Table of existing Price Rules

Either the ID or the Edit choice takes you to the Edit Global Price Rule work page.

### .12.4.1 Price Rule Name and ID

You have assigned the Rule Name, but the system assigns the ID. Click on the combination in this column or click on the [Edit] link to go to the Edit screen where you can change the name if you wish.

### .12.4.2 Sale Rule?

Is this a Sale Rule? Yes or No.

### .12.4.3 From Date

This could be either the date of creation or the date of effectivity of this Price Rule. Optional, so may be blank.

### .12.4.4 Thru Date

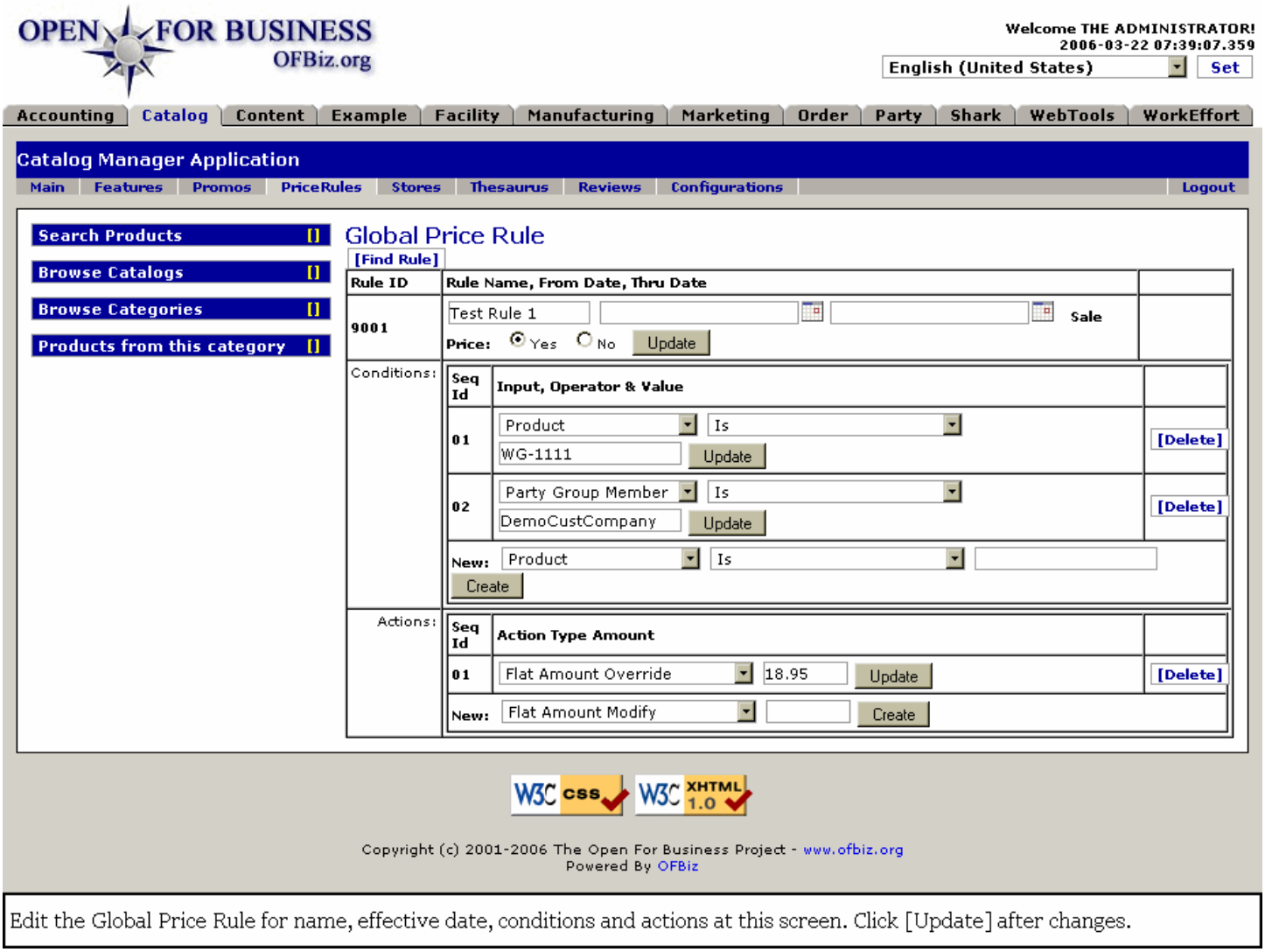
If present, the date when this Price Rule expires.

## .12.5 Add a Price Rule

Key in the name and click on [Add]. The new Rule will now appear in the Table. Click on the new ID or [Edit] to go to the edit screen, discussed below.

## .12.6 Edit Global Price Rule

### .12.6.1 EditProductPriceRules




Edit the Global Price Rule for name, effective date, conditions and actions at this screen. Click [Update] after changes.

## .12.6.2 link buttons

[Find Rule] [Create] [Update] [Delete]

## .12.6.3 Rule ID

The system-generated ID number which tracks this Rule. Cannot be changed.

## .12.6.4 Rule Name

You can assign or edit this name.

## .12.6.5 From Date (popup calendar)

Optional. If present, Rule will not be effective until this date is reached.

## .12.6.6 Thru Date (popup calendar)

Optional. If given, Price Rule will expire at this date and time.

## .12.6.7 Sale Price (Y/N)

Does this affect the Sales Price?

## .12.6.8 Conditions

#### .12.6.8.1 Seq. ID

This number reflects the sequence the conditions were created, so you should progress the conditions from the universal to the specific.

#### .12.6.8.2 Input (drop-down box)

Choices for input from this list include: <B><P> Product <br> Product Category <br> Product Catalog <br> Product Store Group <br> Website <br> Quantity <br> Party <br> Party Group Member <br> Party Classification <br> Role Type <br> List Price <br> Currency UOM ID <br> </B>

#### .12.6.8.3 Operator (drop-down box)

Choices of operator include: <B><P> Is <br> Is Not <br> Is Less Than <br> Is Less Than or Equal To <br> Is Greater Than <br> Is Greater Than or Equal To</B>

#### .12.6.8.4 Value

Enter the ID of the Party, Group, Product, etc., whatever is being operated upon to create the Condition.

#### .12.6.8.5 New Condition sequence rule

To create a new Conditions sequence rule, select Input, Operator and Value here; click on [Create] and the new Condition will appear in the table with a different Seq. ID.

### .12.6.9 Actions

#### .12.6.9.1 Seq ID

These Sequence numbers are assigned as they are created.

#### .12.6.9.2 Action Type (drop-down box)

Select from the drop-down list. The choices offered are discussed below.

#### .12.6.9.3 Amount

If the Amount is to be a percentage discount, use a negative sign (-) in front of the units.

#### .12.6.9.4 New Action sequence rule

To create a new Action sequence rule, select type and enter values here; click on [Create] and the new Action will appear in the table with a different Seq. ID.

#### .12.6.9.5 Actions Discussion

Once the conditions are met, the actions are what determine the final price of the product. You can specify any of the following actions:

##### .12.6.9.5.1 Flat Amount Modify

Modify the price by a flat amount.

##### .12.6.9.5.2 Flat Amount Override

Regardless of the established price, override it with the Amount given here.

##### .12.6.9.5.3 Percent of Average Cost

Take the assigned percentage times the established Average Cost. For example, if you wanted to have 100 percent margin over the Average Cost, enter 200 for the value.

##### .12.6.9.5.4 Percent of Default Price

Generally the same as the List Price, the Default Price is the one assigned in the absence of other calls. In this case, the Price Rule calls for a percentage of the Default Price.

##### .12.6.9.5.5 Percent of List Price

Assign a percent against the established List Price.

### .12.6.9.5.6 Percent of Margin

This refers to List Price - Average Cost. Some companies like to do margin based pricing and not just list or cost based pricing; this makes such possible.

### .12.6.9.5.7 Promo Amount Override

Use the 'Promotional Price' for this item as fixed amount, overriding all other price actions; this is not an adjustment of any existing price but rather a replacement of that price.

### .12.6.9.5.8 Wholesale Amount Override

Charge only the Wholesale Price, whatever that might be.

### .12.6.9.5.9 Multiple actions

When multiple actions are specified, all the actions will be run and the final price determined from that. If there is a Flat Amount or Promotional Amount override, however, these will be used to obtain the final price, and all other actions will be ignored.

# .13 Tab - Catalog Stores

## .13.1 FindProductStore

id:[DOCCAT1559] image:

Table of existing Product Stores. Click on the Store Name-[ID] link or on the [Edit] button to view, edit, or access the sub-tabs.

## .13.2 link buttons

[Create New Product Store] [Edit]

## .13.3 Product Store table

Select a store and you are taken to the first tab of the Store Edit/Creation page. From there you can edit the details of the selected store, or choose one of the other tabs as detailed below.

### .13.3.1 Store Name

Click on the Store Name-ID link to edit the Store.

### .13.3.2 Title

This is what is presented to your customers as the 'Name' of your store or business.

### .13.3.3 Sub-Title

This would be like a motto, slogan, or marketing phrase to help your customers have a 'feel' for your business.

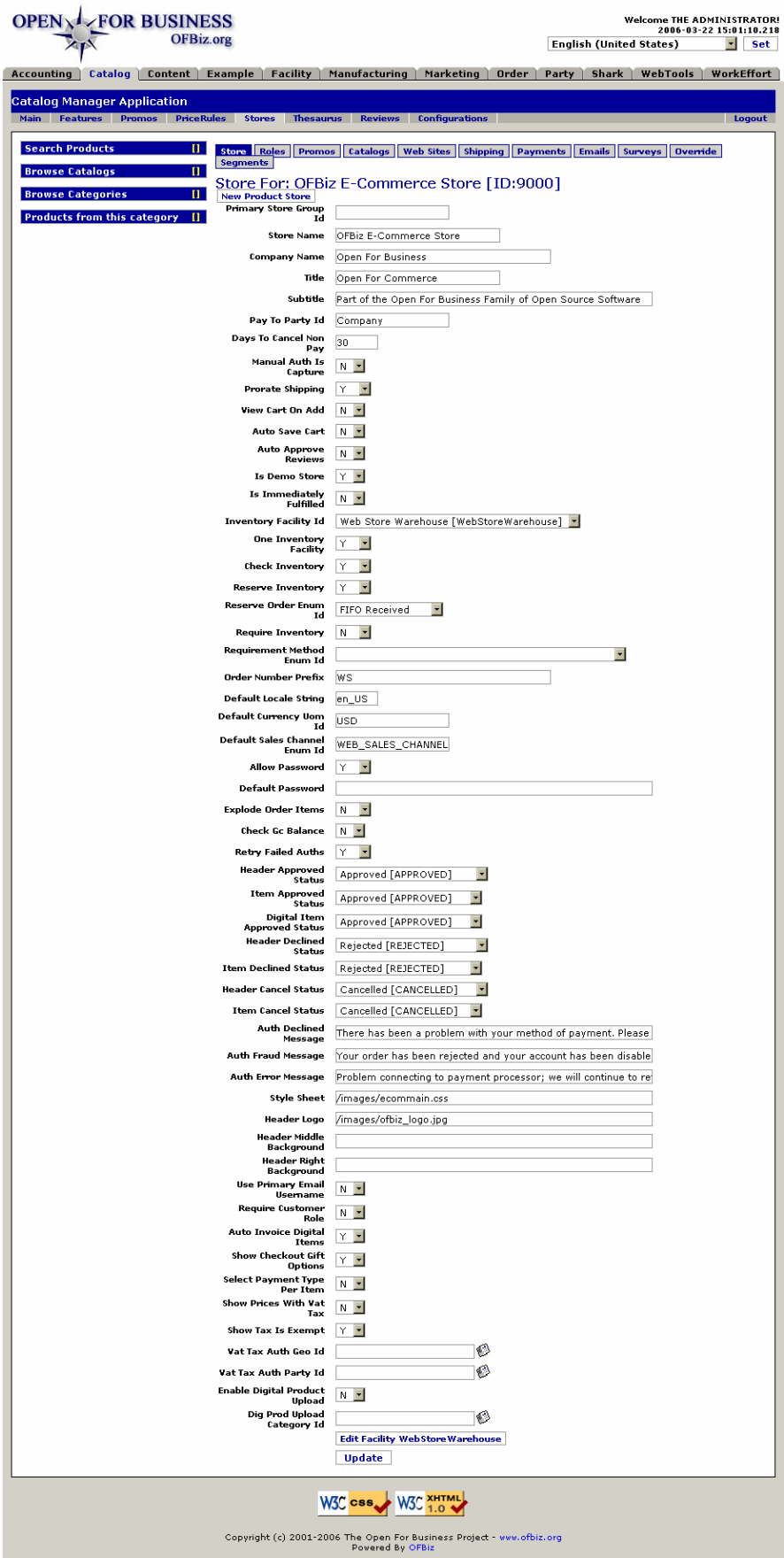
## .13.4 Store

### .13.4.1 Discussion

A 'Store' is not a building with signs, windows, shelves and people selling things. Today it is an organized effort to achieve a business objective. The Name is part of its identity; products and/or services are offered; various functions are performed to assemble, present, and deliver those goods and services. <p> With Open For Business, you can maintain several different Stores, each with their unique Identity and Purpose, which may share many of the

resources (people, products, physical addresses, etc.) and monitor the operation within this one suite of applications. In this Application (Store Manager) you specify the details of the operating entity - The Store. <p> Entries made in this section are reflected in many critical operations within other Managers. For example, choices indicated on the following screen are important in the operation of the Catalog Manager, The Order Manager, the Manufacturing Manager, and the Accounting Manager. In turn, data and choices maintained in the Party Manager, the Content Manager, and the Facility Manager are called upon from this Application to perform its functions. <P> You will return to this section frequently as you setup and maintain your businesses to adjust, fine tune and improve your operation. You might consider this to be the Staff for the Chief Operations Officer!

## .13.4.2 EditProductStore




Enter (or change) details about your Store. This screen can also be a working checklist to help you create your own Store.

## .13.4.3 link buttons

[New Product Store] [Update] [Edit Facility ...] <B>[Store] [Roles] [Promos] [Catalogs] [Web Sites] [Shipping] [Payments] [Emails] [Surveys] [Override] [Segments]</B>

## .13.4.4 Store for: ... (ID...)

This is the Name and Product Store ID assigned by the application when the Product Store was created. It cannot be changed here.

## .13.4.5 Primary Store Group ID

What group this store belongs to. As mentioned in the section above on pricing, stores can be grouped together with a price for each store group. It can be left blank if there are no store groups set up. Store groups cannot be set up in the catalog manager and must be inserted directly into the database.

## .13.4.6 Store Name

This is the name of the store that this catalog represents.

## .13.4.7 Company Name

This is the name as you want it to appear on the display.

## .13.4.8 Title

This is the theme name as you want it to appear on the display.

## .13.4.9 Subtitle

This is the strapline for the display.

## .13.4.10 Pay To Party ID

A party (see Party Manager) where store payments will be credited to.

## .13.4.11 Days to Cancel Non Pay

Triggers cancellation for non-payment after number of days entered here. There is an automated service that can be scheduled (see Job Scheduler in Webtools) nightly to cancel orders which have not been paid. This defines how many days an order can be outstanding and unpaid before it is canceled. A value of zero here will leave all orders open indefinitely.

## .13.4.12 Manual Auth Is Capture (Y/N)

Drop-down Y/N box on the question of whether a Manual Authorization is captured.

## .13.4.13 Prorate Shipping (Y/N)

When some share of the cost of shipping is covered under an account other than the bill-to.

## .13.4.14 View Cart on Add (Y/N)

Controls whether the user is taken to the shopping cart immediately after adding a product to his cart.

## .13.4.15 Auto Save Cart (Y/N)

Drop-down Y/N box on the question of automatically saving the contents of the shopping cart.

## .13.4.16 Auto Approve Reviews (Y/N)

If the site allows users to enter product reviews, this controls whether the reviews must be approved (see 'Product reviews' below), or whether they are automatically shown on the site.

## .13.4.17 Is Demo Store (Y/N)

Drop-down Y/N box on the question of whether this is a Demonstration store (Y) or a working business (N). When

operating as a business, you will want this to say Yes. For a training setup, by choosing No, any orders created will not be sent, credit card charges will not be made, etc.

## .13.4.18 Is Immediately Fulfilled (Y/N)

Drop-down Y/N box on the question of whether an order is immediately fulfilled through system-generated processes in the Warehouse, Accounting, Shipping, Inventory and/or other segments of the business. If the fulfillment process is held for a manual or credit review and approval of the order first, this answer should be No. <P> In fact, the only likely time this would be set to Yes is for a POS operation (Point Of Sale) where the item is only sold off the shelf and handed directly to the customer or the customer 'shops' the store then pays at a checkout station.

## .13.4.19 Inventory Facility ID (drop-down box)

This is where the stock levels are drawn from. Used for knowing where to change product inventory as items are sold. See the 'Facility Manager' to create a facility. All existing facilities are presented here.

## .13.4.20 One Inventory Facility (Y/N)

If this is a 'Single Inventory' facility, set to Y for yes. With newer or less complex businesses, you will find the Single Inventory concept much easier to work with.

## .13.4.21 Check Inventory (Y/N)

This determines whether the system checks inventory levels when processing an order. If inventory IS checked (Y), the item cannot be ordered or rather the order cannot be fulfilled if there is insufficient QOH or ATP. If Inventory is not checked, however, the order may be accepted but items not available will be processed as a back-order. You need a system in place to track, replenish and fulfill back-ordered items if you set this flag to N.

## .13.4.22 Reserve Inventory (Y/N)

Causes inventory to be reserved for items ordered in the store. The inventory may still be on hand but will no longer be available for other orders.

## .13.4.23 Reserve Order Enum ID (drop-down box)

Choose how inventory should be reserved: FIFO, LIFO.

## .13.4.24 Require Inventory (Y/N)

If sufficient inventory not on hand, order will not be processed when this flag is set to Yes.

## .13.4.25 Requirement Method Enum ID (drop-down box)

Select from these choices on the drop-down list: <B><P> FIFO Expire <br> FIFO Received <br> Greater Unit Cost <br> LIFO Expire <br> LIFO Received <br> Less Unit Cost</B>

## .13.4.26 Order Number Prefix

All orders will be prefixed by this. For example, if you wished accounting to be able to quickly differentiate orders between stores, each store could have a prefix affixed such as DENxxxxx, NYxxxxx, LAxxxxxx, etc.

## .13.4.27 Default Locale String

Default locale, for language, number, and currency formats.

## .13.4.28 Default Currency Uom ID

Which national currency will be used if none is specified. Use webtools to find codes for non-US locations.

## .13.4.29 Default Sales Channel Enum ID

Unless the sales channel has been specified in the transaction, it will be assumed that the sale came in through the selected path. Be sure to enter this correctly, exactly as it is recognized by the system.

## .13.4.30 Allow Password (Y/N)

Defaults to Y (Yes), if N (No) then when a customer creates an account they will not be asked for a password and they have to wait for their account to be enabled and a password to be sent to them.

## .13.4.31 Default Password

If you allow others access with a password, what is the default password that anyone could use if they knew it?

## .13.4.32 Explode Order Items (Y/N)

Defaults to N, if set to Y then any shopping cart item with a quantity greater than one will be split into separate order items with a quantity of 1 each.

## .13.4.33 Check Gc Balance (Y/N)

## .13.4.34 Retry Failed Auths (Y/N)

How many times can an unsuccessful attempt to authorize an order be allowed?

## .13.4.35 Header Approved Status

This is the message you want your customers to see when their order is approved.

## .13.4.36 Item Approved Status

What to set order items status to when orders are approved, declined, or canceled. Based on the standard defined status codes in Open for Business.

## .13.4.37 Digital Item Approved Status

What to set order items status to when Digital Item orders are approved, declined, or canceled. Based on the standard defined status codes in Open for Business.

## .13.4.38 Header Declined Status

This is the message you want your customers to see when their order is declined. Based on the standard defined status codes in Open for Business.

## .13.4.39 Item Declined Status

This is the message you want the customer to see when one of their items is declined for some reason.

## .13.4.40 Header Cancel Status

This is the message that you want the client to see when their order is cancelled.

## .13.4.41 Item Cancel Status

The message shown when an item they ordered is cancelled.

## .13.4.42 Auth Declined Message

Message shown when payment authorization is declined.

## .13.4.43 Auth Fraud Message

Message sent when fraud is suspected.

## .13.4.44 Auth Error Message

Message sent when a processing error is encountered.

## .13.4.45 Style Sheet

For controlling the look and feel and a web-based store. You can define the stylesheet (CSS) and images for the store here.

## .13.4.46 Header Logo

This is the logo that the store uses and is the company logo for headed displays (stationary, web pages etc.,).

## .13.4.47 Header Middle Background

URI pathway to content for the display presented to the right of the Header, will be placed in the middle background of the screen.

## .13.4.48 Header Right Background

URI pathway to content for the display presented to the far right of the Header, will be placed in the right-side background of the screen.

## .13.4.49 Use Primary Email Username (Y/N)

Defaults to N; if set to Y then in the create customer form no entry box will be presented for a username and the primary email address will be used for that. If set to N, the default, there is a checkbox a user can select to use the email address as a username, but they also have the option of entering a username.

## .13.4.50 Require Customer Role (Y/N)

Defaults to N; if set to Y then the customer must be associated with the store in the Customer role in order to be able to login. If they are not associated with the store in the Customer role, they will receive an error message when they try to login. Note that this means entering an assignment of Customer as Role for every customer that wants to by. This could delay them from being able to make purchases. It also means giving attention to every prospect until they become identified as a Customer.

## .13.4.51 Auto Invoice Digital Items (Y/N)

Default to Y meaning that digital items will be immediately invoiced when the order is placed rather than waiting for some sort of fulfillment process to set the item status to complete which would then trigger the invoice creation.

## .13.4.52 Show Checkout Gift Options (Y/N)

This defaults to Y; if set to N the options related to gifts (the 'is gift' and 'gift message' options) will not be shown during checkout. This is meant for use in business oriented stores or others where the gift options do not make sense.

## .13.4.53 Select Payment Type Per Item (Y/N)

Defaults to N; if Yes, allows customer to pay for some order items with one payment type, others with another type.

## .13.4.54 Show Prices With Vat Tax (Y/N)

Should the displayed prices include (Y) or not include (N) the VAT Tax amount?

## .13.4.55 Show Tax Is Exempt (Y/N)

Will it be appropriate to indicate when an item is exempt from tax?

## .13.4.56 Vat Tax Auth Geo ID (popup search tool)

What is the Geographical ID for the VAT taxing authority? Use the popup search tool to identify.

## .13.4.57 Vat Tax Auth Party ID (popup search tool)

What is the Party ID of the Vat Taxing Authority? Use the popup search tool to identify.

## .13.4.58 Enable Digital Product Upload (Y/N)

Unless this is set to Yes, the sale of Digital Products from your Store will not be permitted.

## .13.4.59 Dig Prod Upload Category Id (popup search tool)

Which Category of Digital Products may be uploaded?

## .13.4.60 'Edit Facility WebStore Warehouse' link

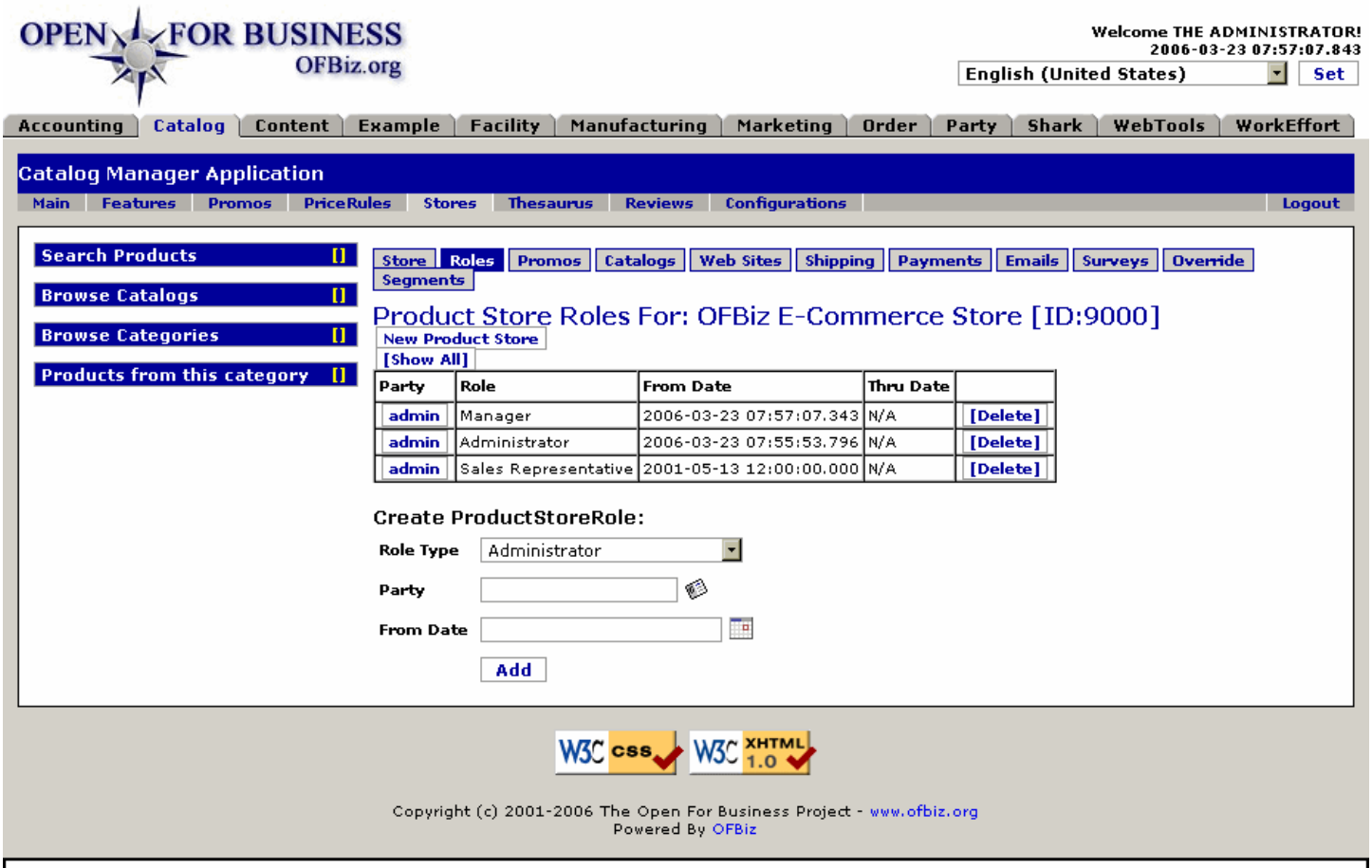
Takes you to the Facilities Manager > Facilities Tab > Facility Sub-tab for this store. When making changes here in the Catalog Manager > Stores tab, it is quite likely you will also need to take care of some items in the Facilities Manager as well.

## .13.5 Roles

The Edit function is performed in the Party Manager under the Profile tab.

### .13.5.1 EditProductStoreRoles

id:[DOCCAT1628] image:




Role of Parties associated with this Store are set here; PartyID in the Party column takes you to the Party Manager > Roles tab.

### .13.5.2 link buttons

[New Product Store] [Show All] [Delete] [Add] <B> [Store] [Roles] [Promos] [Catalogs] [Web Sites] [Shipping] [Payments] [Emails] [Surveys] [Override] [Segments] </B>

### .13.5.3 Table of Roles

The link [Show All] will display expired Roles as well as active ones. Thru Date only applies to deleted or expired Roles.

#### .13.5.3.1 Party

Click on the ID to edit the Party in the Party Manager.

#### .13.5.3.2 Role

Actually the Role Type as selected earlier from the list.

#### .13.5.3.3 From Date

Date the assignment was created or made effective.

#### .13.5.3.4 Thru Date

Only given when a Party has been deleted or expired from the list.

### .13.5.4 Create Product Store Role

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

Select the anticipated Role from the drop-down box.

#### .13.5.4.2 Party

You may use the popup search tool to help find the Party.

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

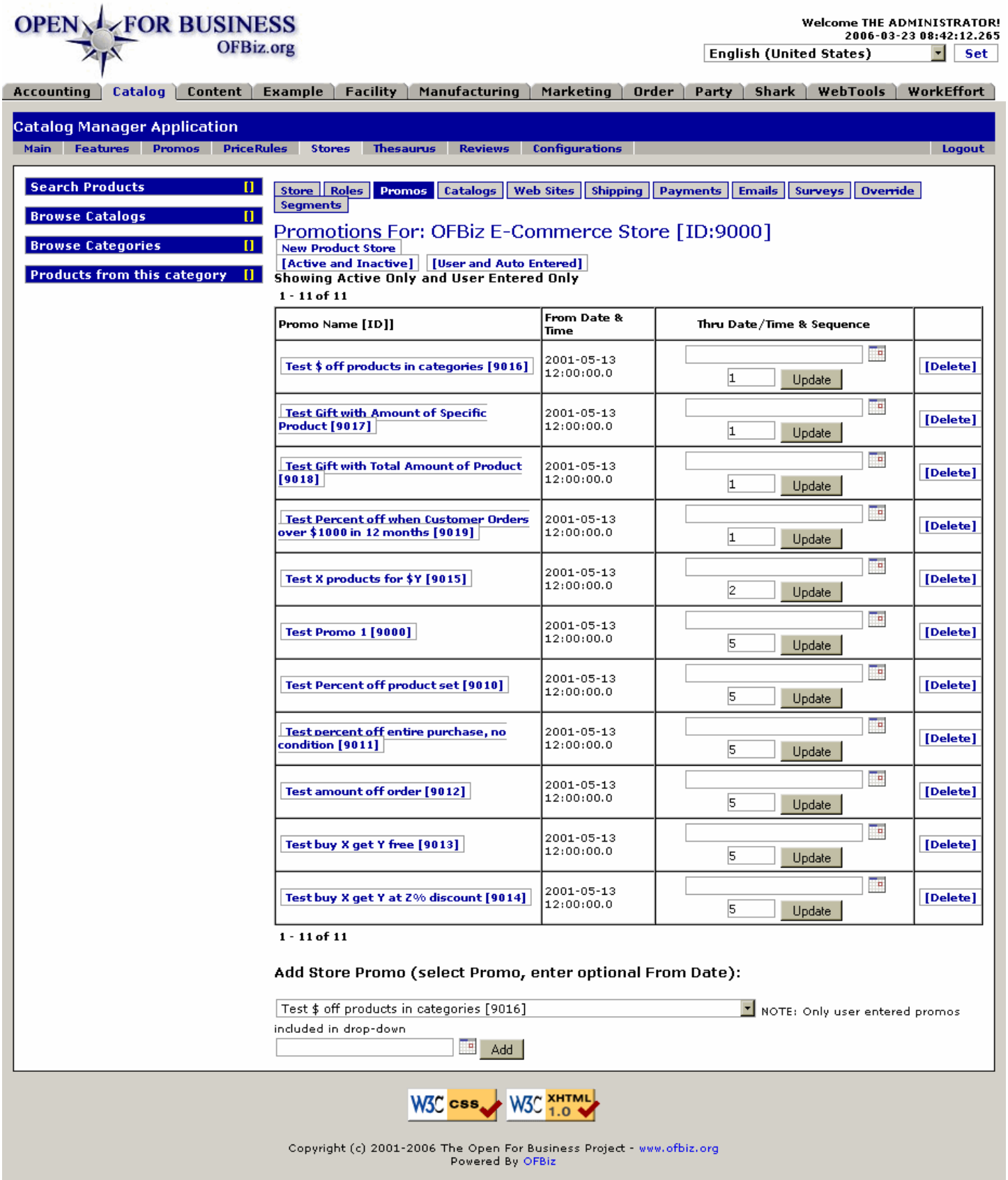
Defaults to Now; enter a future date if not to be effective until later.

## .13.6 Promos

### .13.6.1 Discussion

Links to the Promo Name [ID] will take you to the Catalog - Promos tab where additional details are available for that promotion. <P> Only promos associated with the selected store will be shown here. If a promo is deleted here, it is only deleted from this store association, not from the system. <P> What you see here is asically the same as what you find under the major tab - Promos. The difference: these are the ones selected just for this Store. They are created and treated essentially the same here as under the other Tab, but remember that these will not apply to other stores unless you assign them to that specific Store.

### .13.6.2 EditProductStorePromos




Only Promotions currently associated with this Store are shown here; use the tool beneath the table to associate new Promotions.

### .13.6.3 link buttons

[New Product Store] [Active and Inactive (toggle)] [User and Auto Entered (toggle)] [Update] [Delete] [Add] <B> [Store] [Roles] [Promos] [Catalogs] [Web Sites] [Shipping] [Payments] [Emails] [Surveys] [Override] [Segments] </B>

### .13.6.4 Table of Promotions

#### .13.6.4.1 Discussion

Promos listed are for the active Product Store and meet the criteria set by the toggles above.

#### .13.6.4.2 Promo Name (ID)

Link to Promotion Edit screen Under Catalog Manager > Promos tab.

#### .13.6.4.3 From Date

Date created or made effective.

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

Shows when the association of this Promotion with the Product Store ends or expires. Use the popup calendar to set or change an expiration date. Click [Update] to complete any changes.

#### .13.6.4.5 Sequence

If there is a sequencing system in place, this is the number assigned.

### .13.6.5 Tool to Add Store Promo

#### .13.6.5.1 Select promo (drop-down box)

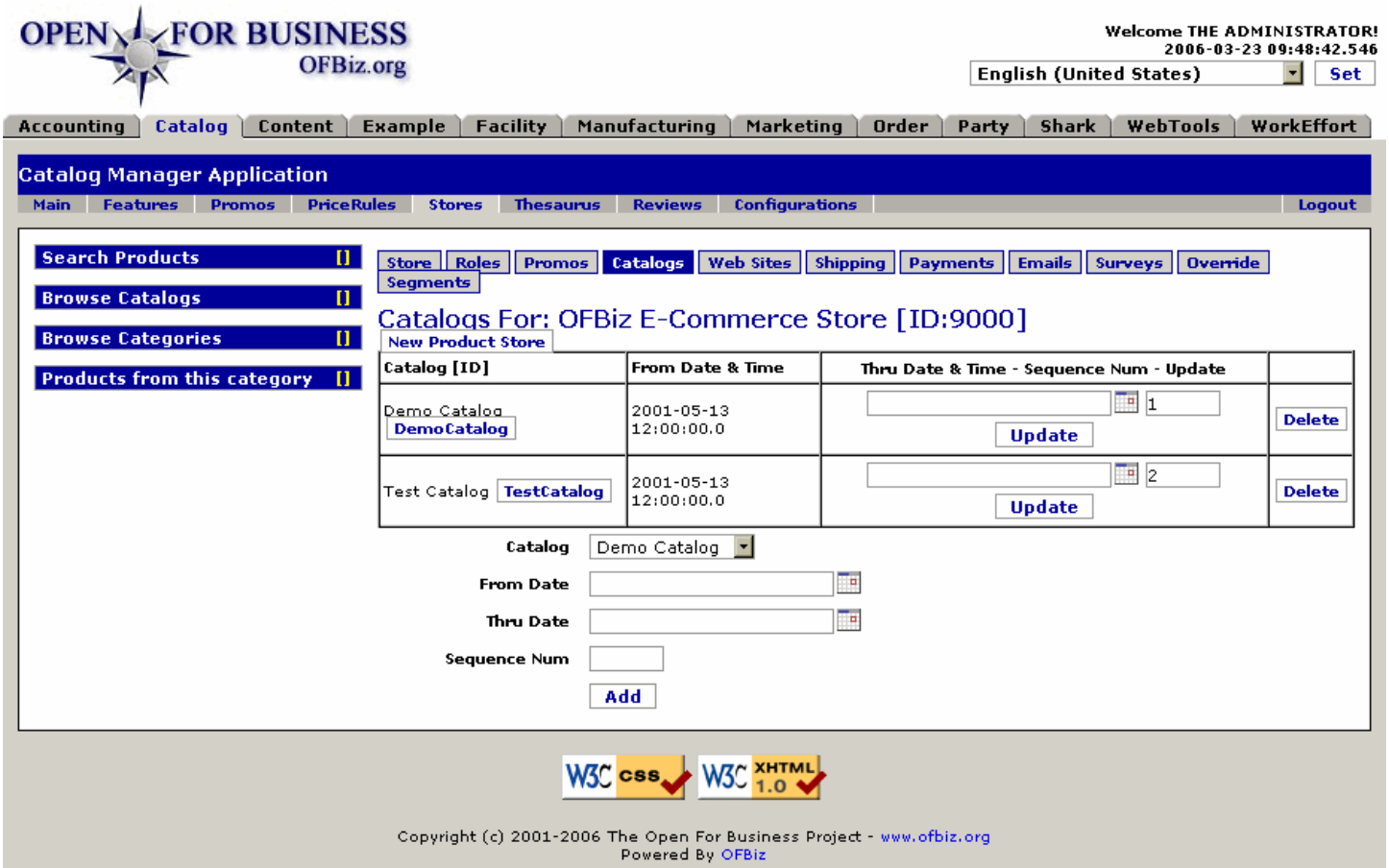
Only user entered Promos already in the system at the Catalog - Promos tab can be added to the Store.

#### .13.6.5.2 From date and time

Defaults to Now; use the popup calendar to enter a future effectivity date.

## .13.7 Catalogs

### .13.7.1 EditProductStoreCatalogs




Any Catalog associated with the active Store can be selected for edit from here; additional Catalogs can be linked as well.

## .13.7.2 link buttons

[New Product Store] [Update] [Delete] [Add] <B> [Store] [Roles] [Promos] [Catalogs] [Web Sites] [Shipping] [Payments] [Emails] [Surveys] [Override] [Segments] </B>

## .13.7.3 Table of applicable catalogs

Click on [Edit] or the Catalog ID to go to the Edit Catalog screen. From there you can edit the Catalog, the Stores, the Parties or the Categories associated with it. See Catalog - EditProdCatalog for details on those screens.

### .13.7.3.1 Catalog

Name of the Catalog and its Catalog ID. Click on the ID to edit.

### .13.7.3.2 From Date and Time

Date the association was created or made effective.

### .13.7.3.3 Thru Date and Time (popup calendar)

Enter if you wish the Catalog to expire at a future date.

### .13.7.3.4 Sequence Num

If there is a sequencing system in place, this is the number.

## .13.7.4 Tool to add catalog

### .13.7.4.1 Catalog (drop-down box)

Select the Catalog to add from the drop-down list.

### .13.7.4.2 From Date (popup calendar)

Defaults to Now; enter if you wish a future date of effectivity.

### .13.7.4.3 Thru Date (popup calendar)

Enter only if you wish the association to expire at some future point.

### .13.7.4.4 Sequence Num

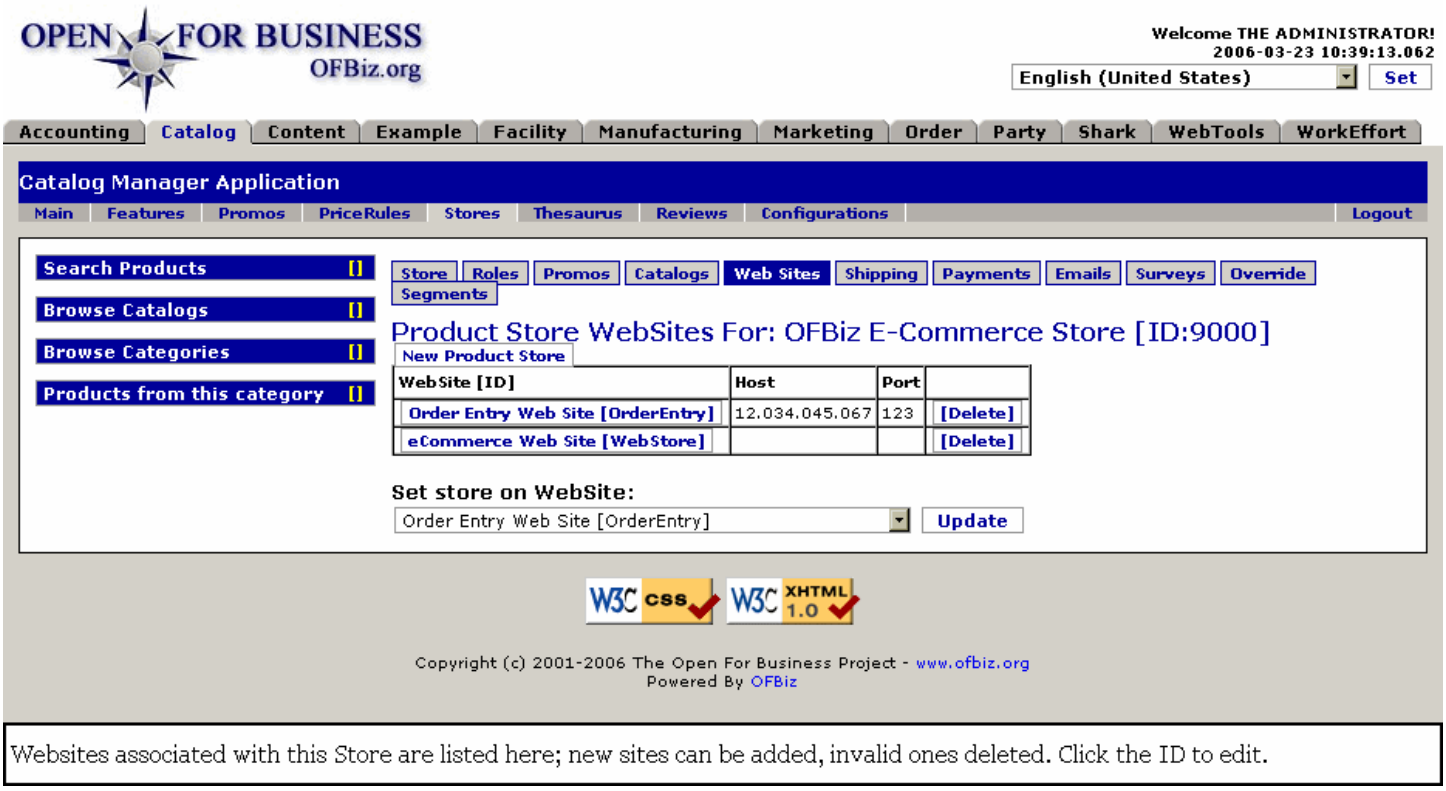
If there is a sequencing system in place, enter the Sequence number for this Catalog here.

## .13.8 Web Sites

A click on Site Name takes you to the Content Manager - WebSites tab to update web site data.

### .13.8.1 EditProductStoreWebSites

id:[DOCCAT1663] image:




Websites associated with this Store are listed here; new sites can be added, invalid ones deleted. Click the ID to edit.

### .13.8.2 link buttons

[New Product Store] [Delete] [Update] <B> [Store] [Roles] [Promos] [Catalogs] [Web Sites] [Shipping] [Payments] [Emails] [Surveys] [Override] [Segments] </B>

### .13.8.3 Table of Websites

#### .13.8.3.1 WebSite

A click on the Website ID takes you to the Content Manager - Edit Website screen.

#### .13.8.3.2 Host

The address of the Host.

#### .13.8.3.3 Port

The server Port connection for the Website.

### .13.8.4 Set store on WebSite

Select name from drop-down box, then click on [Update].

## .13.9 Shipping

### .13.9.1 EditProductStoreShipSetup

id:[DOCCAT1685] image:

More than just a table of Shipment Settings, this is a portal to creating new Estimates and new Methods as well as viewing the details about existing Shipping Estimates.

### .13.9.2 link buttons

[New Product Store] [New Shipment Estimate] [New Shipment Method] [Delete] [View] <B> [Store] [Roles] [Promos] [Catalogs] [Web Sites] [Shipping] [Payments] [Emails] [Surveys] [Override] [Segments] </B>

### .13.9.3 Estimate ID

The ID number assigned by the system when the Estimate was created.

### .13.9.4 Method

What method is the order being shipped: UPS Ground? Postal? DHL?

### .13.9.5 To

Destination geographically. If All, that means all destinations; in other words, this is a blanket estimate. If the Estimate names a specific destination, it will be listed here. <P> NOTE: When created, the drop-down box lists all countries, all provinces, all states, and regions, so this <B>To</B> refers to major geographical destinations but not cities or communities.

## .13.9.6 Party

<B>All</B> means that this Estimate is valid for All parties using the system. If a Party is named, then this Estimate is just for that Party.

## .13.9.7 Role

If <B>All</B>, then this Estimate is valid for All or any Party Role using it. If there is a Role listed, then the Estimate is only valid for those with that Role.

## .13.9.8 Base Prc

Flat Base Percent of the total order value. Determined by the formula: <br> <B>shipamount=shipamount + (orderTotal * percent)</B>

## .13.9.9 Base Price

Flat Base Price. Determined by the formula: <br> <B>shipamount=shipamount + price</B>

## .13.9.10 Item Price

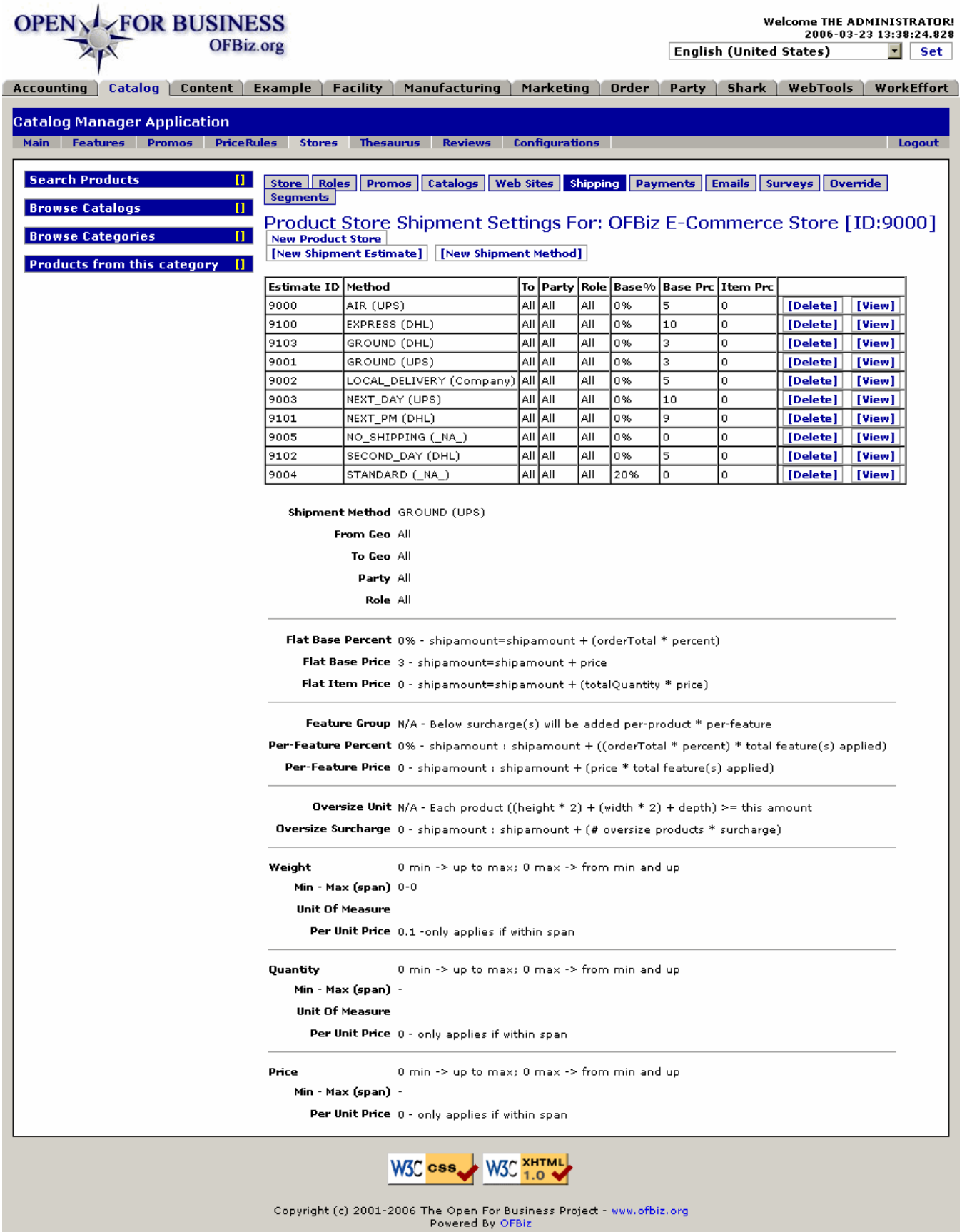
Flat Item Price on the total order quantity. Determined by the formula: <br> <B> shipamount=shipamount + (totalQuantity * price) </B>

## .13.9.11 Product Store Shipment Settings

### .13.9.11.1 Discussion

You may have many different Shipping Estimates associated with any one Shipping Method. This makes it possible to accommodate the variety of shipping situations you are likely to encounter.

### .13.9.11.2 EditProductStoreShipSetup-View




When [View] is selected for anyof the displayed settings, an enlarged presentation like this is presented.

### .13.9.11.3 link buttons

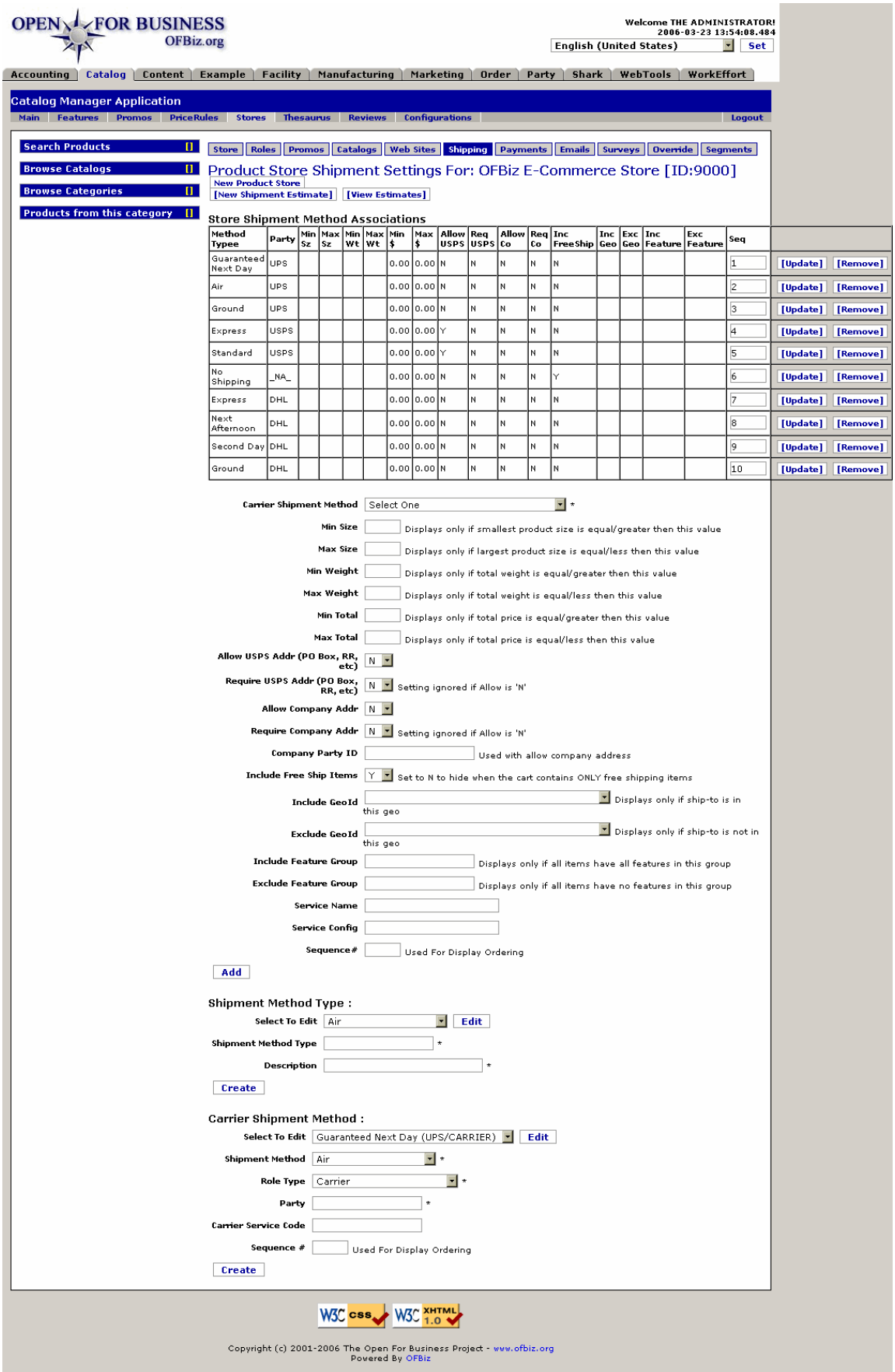
[New Product Store] [New Shipment Estimate] [New Shipment Method] [Delete] [View] <B> [Store] [Roles] [Promos] [Catalogs] [Web Sites] [Shipping] [Payments] [Emails] [Surveys] [Override] [Segments]</B>

### .13.9.11.4 Details of the Settings

These details given beneath the table will vary according to the shipping method. Shown here are typical details from one method.

## .13.9.12 New Product Store Shipment Method Settings

### .13.9.12.1 EditProductStoreShipSetup-Method




Add, create, delete or edit details of the Store Shipment Method Associations from this working screen. Caution: settings impact Order Entries.

## .13.9.12.2 link buttons

[New Product Store] [New Shipment Estimate] [View Estimates] [Update] [Remove] [Add] [Edit] [Create] <B> [Store] [Roles] [Promos] [Catalogs] [Web Sites] [Shipping] [Payments] [Emails] [Surveys] [Override] [Segments] </B>

## .13.9.12.3 Table of Store Shipment Method Associations

### .13.9.12.3.1 Method Type

Originally entered from the Carrier Shipment Method drop-down box beneath the table and created at the 'Shipment Method Type' section of the tools below.

### .13.9.12.3.2 Party

This is the Party that performs the shipping: UPS, DHL, etc.

### .13.9.12.3.3 Min Sz

Minimum Size - Displays only if smallest product size is equal/greater than this value. <br> Be careful with this. If your Minimum Size is too large, anything smaller will not be shipped by this method. You do not need to state a Minimum Size unless the Carrier has specified such.

### .13.9.12.3.4 Max Sz

Maximum size - Displays only if largest product size is equal/less than this value. <br> As with the Minimum Size, if your parameter is set too small, anything larger will not be accommodated. You really do not need to state a Maximum Size unless the Carrier has specified such.

### .13.9.12.3.5 Min Wt

Minimum weight - Displays only if total weight is equal/greater than this value. <br> You really do not need to state a Minimum weight unless the Carrier has specified such. Consider this: if the catalog does not carry any weight measurement for the item, that '0' would register as below whatever Minimum you might set over '0'. In this case, you could not ship the item with this method; it would not appear as a choice.

### .13.9.12.3.6 Max Wt

Maximum weight - Displays only if total weight is equal/less than this value. <br> Not recommended unless the Carrier has specified a Maximum. Anything over this weight will cause the Shipment Method to not be shown.

### .13.9.12.3.7 Min $

Minimum Total Price - Displays only if total price is equal/greater than this value. <br> Unless there is a cost - value determination that this is not an economical method to ship items for less than this amount, you need not specify a Minimum Total Price. Any amount you specify will be a cut-off: if $10 is stated (for example), then an order for $9.99 or less will not have this Shipping Method dsplayed.

### .13.9.12.3.8 Max $

Maximum Total Price - Displays only if total price is equal/less than this value. <br> You really do not need to state a Maximum Total Price unless the Carrier has specified such for insurance reasons, for example. Any orders exceeding this Total Price will not have this shipping method displayed to them.

### .13.9.12.3.9 Allow USPS (Y/N)

Allow USPS Addr (PO Box, RR, etc) - refers to the difference between a mailing address and a shipping address. Some items cannot be received at a US Postal Service address, especially when this involves a consolidated or centralized mail box station at an apartment complex, for example, or at a Postal Facility (PO Box). Smaller items generally are acceptable. This choice is to flag whether receipt at the limited Postal facility is acceptable. <P> For Shipment Methods using DHL and other private carriers, this should be set to N because they cannot deliver to PO boxes. For Shipment Methods using USPS, this must be set to Y.

### .13.9.12.3.10 Req USPS

Require a USPS Address (PO Box, RR, etc.) - Sometimes the shipment MUST be made to a USPS address to

ensure, for example, that no one other than the addressee receives the item. If too large for a postal box, the item could be held at the Postal facility for claim by the addressee. <P> Generally set this to N unless the carrier is USPS because the US Postal Service can always ship to these addresses.

#### .13.9.12.3.11 Allow Co

Allow Company Address - If an item is sent to a private party but received at a Company address, there is greater likelihood that the addressee might never receive it, or claim to never have received it. <P> On the other hand, the reasoning above is just speculative; you need to be able to ship wherever the customer wants delivery, so this should probably be set to Y. This flag, if set to N, indicates denial of delivery to a company address.

#### .13.9.12.3.12 Req Co

Require Company Address? When the order has been made on behalf of a company, or the shipment is the result of a company purchase order or company account, shipment should be made to a Company address rather than an individual's address. This will help to ensure receipt and subsequent payment for the product. <P> On the other hand, if the flag is set to Yes, then this method cannot be used unless the order is being shipped to a Company address. Therefore, to Require a Company Address should probably be set to N unless you have a compelling reason to require it.

#### .13.9.12.3.13 Inc Free Ship

Include Free Ship Items - Set to N to hide when the cart contains ONLY free shipping items.

#### .13.9.12.3.14 Inc Geo

Include Geo Id (the geographical area code) - Displays only if the ship-to is in this geographical area.

#### .13.9.12.3.15 Exc Geo

Exclude Geo Id - Displays only if ship-to is not in this geographical area.

#### .13.9.12.3.16 Inc Feature

Include Feature Group - Displays only if <B>all</B> items have <B>all</B> of the features in this group.

#### .13.9.12.3.17 Exc Feature

Exclude Feature Group - Displays only if <B>all</B> items have <B>NONE</B> of the features in this group.

#### .13.9.12.3.18 Sequence

Sequence number assigned.

### .13.9.12.4 Carrier Shipment Method criteria

#### .13.9.12.4.1 Carrier Shipment Method (drop-down box)

Select from the drop-down box.

#### .13.9.12.4.2 Min Size

Minimum Size - Displays only if smallest product size is equal/greater than this value. <br> Be careful with this. If your Minimum Size is too large, anything smaller will not be shipped by this method. You really do not need to state a Minimum Size unless the Carrier has specified such.

#### .13.9.12.4.3 Max Size

Maximum size - Displays only if largest product size is equal/less than this value. <br> As with the Minimum Size, if your parameter is set too small, anything larger will not be accommodated. You really do not need to state a Maximum Size unless the Carrier has specified such.

#### .13.9.12.4.4 Min Weight

Minimum weight - Displays only if total weight is equal/greater than this value. <br> You really do not need to state a Minimum weight unless the Carrier has specified such. Consider this: if the catalog does not carry any weight measurement for the item, that '0' would register as below whatever Minimum you might set over '0'. In this case, you could not ship the item with this method; it would not appear as a choice.

### .13.9.12.4.5 Max Weight

Maximum weight - Displays only if total weight is equal/less than this value. <br> Not recommended unless the Carrier has specified a Maximum. Anything over this weight will cause the Shipment Method to not be shown.

### .13.9.12.4.6 Min Total ($)

Minimum Total Price - Displays only if total price is equal/greater than this value. <br> Unless there is a cost - value determination that this is not an economical method to ship items for less than this amount, you need not specify a Minimum Total Price. Any amount you specify will be a cut-off: if $10 is stated (for example), then an order for $9.99 or less will not have this Shipping Method dsplayed.

### .13.9.12.4.7 Max Total ($)

Maximum Total Price - Displays only if total price is equal/less than this value. <br> You really do not need to state a Maximum Total Price unless the Carrier has specified such for insurance reasons, for example. Any orders exceeding this Total Price will not have this shipping method displayed to them.

### .13.9.12.4.8 Allow USPS Addr (Y/N)

Allow USPS Addr (PO Box, RR, etc) - refers to the difference between a mailing address and a shipping address. Some items cannot be received at a US Postal Service address, especially when this involves a consolidated or centralized mail box station at an apartment complex, for example, or at a Postal Facility (PO Box). Smaller items generally are acceptable. This choice is to flag whether receipt at the limited Postal facility is acceptable. <P> For Shipment Methods using DHL and other private carriers, this should be set to N because they cannot deliver to PO boxes. For Shipment Methods using USPS, this must be set to Y.

### .13.9.12.4.9 Require USPS Addr (Y/N)

Setting ignored if Allow USPS Addr is 'N'. Sometimes the shipment MUST be made to a USPS address to, for example, ensure that no one other than the addressee receives the item. If too large for a postal box, the item could be held at the Postal facility for claim by the addressee. <br> Generally set this to N unless the carrier is USPS because the US Postal Service can always ship to these addresses.

### .13.9.12.4.10 Allow Company Addr (Y/N)

Allow Company Address - If an item is sent to a private party but received at a Company address, there is greater likelihood that the addressee might never receive it, or claim to never have received it. <P> On the other hand, the reasoning above is just speculative; you need to be able to ship wherever the customer wants delivery, so this should probably be set to Y. This flag, if set to N, indicates denial of delivery to a company address.

### .13.9.12.4.11 Require Company Addr (Y/N)

Setting ignored if Allow is 'N'. When the order has been made on behalf of a company, or the shipment is the result of a company purchase order or company account, shipment should be made to a Company address rather than an individual's address. This will help to ensure receipt and subsequent payment for the product. <P> On the other hand, if the flag is set to Yes, then this method cannot be used unless the order is being shipped to a Company address. Therefore, to Require a Company Address should probably be set to N unless you have a compelling reason to require it.

### .13.9.12.4.12 Company Party ID

Used with 'Allow company address.'

### .13.9.12.4.13 Include Free Ship Items (Y/N)

Set to N to hide when the cart contains ONLY free shipping items.

### .13.9.12.4.14 Include GeoID (drop-down box)

Displays only if ship-to<B> is</B> in this geo.

### .13.9.12.4.15 Exclude GeoID (drop-down box)

Displays only if ship-to is <B>not</B> in this geographical area.

### .13.9.12.4.16 Include Feature Group

Displays only if <B>all</B> items have <B>all</B> features in this group.

#### .13.9.12.4.17 Exclude Feature Group

Displays only if <B>all</B> items have <B>NO</B> features in this group.

#### .13.9.12.4.18 Service Name

Name of the shipping service. This is NOT the Carrier. Unless you are using an on-line rate inquiry service or some similar shipping information support company, this field should remain blank.

#### .13.9.12.4.19 Service Config

Configuration established for this Shipment Method as associated with the forgoing Service Company. You can probably leave this blank.

#### .13.9.12.4.20 Sequence #

Used For Display Ordering.

### .13.9.12.5 Shipment Method Type

Edit takes you to the New Shipment Work Screen, above.

#### .13.9.12.5.1 Select To Edit (drop-down box)

Select from one of the following types of Shipment Methods: <B> <P> Air <br> Express <br> Ground <br> Guaranteed Next Day <br> Local Delivery <br> Next Afternoon <br> No Shipping <br> Second Day <br> Standard</B>

#### .13.9.12.5.2 Shipment Method Type *

Required Field. This is the Carrier's name for the Method Type.

#### .13.9.12.5.3 Description *

Required field. Enter a short descriptive phrase, then click on [Create].

### .13.9.12.6 Carrier Shipment Method

Edit takes you to the New Shipment Work Screen, above.

#### .13.9.12.6.1 Select to Edit (drop-down box)

Choose from the drop-down box. Entries are combinations of a Shipment Method and a Carrier.

#### .13.9.12.6.2 Shipment Method * (drop-down box)

Required field. Select from one of the following types of Shipment Methods: <B> <P> Air <br> Express <br> Ground <br> Guaranteed Next Day <br> Local Delivery <br> Next Afternoon <br> No Shipping <br> Second Day <br> Standard</B>

#### .13.9.12.6.3 Role Type * (drop-down box)

Required field. Although all established Roles are presented in the list, 'Carrier' is most likely the one desired here.

#### .13.9.12.6.4 Party *

Party ID for the Carrier itself.

#### .13.9.12.6.5 Carrier Service Code

This is the Code or name the Carrier Service assigns to this type of shipment service.

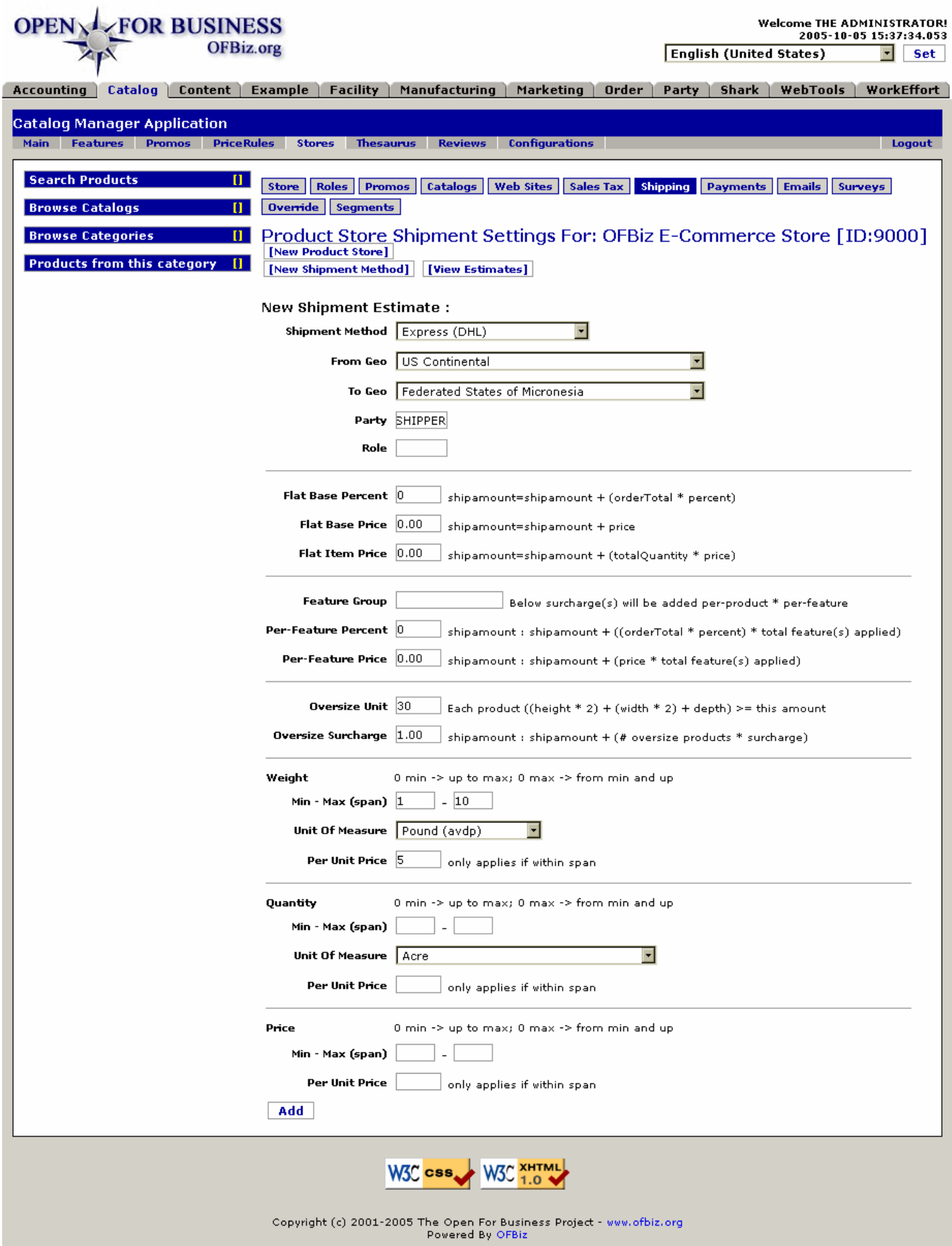
#### .13.9.12.6.6 Sequence #

Used for display ordering.

## .13.9.13 New Product Store Shipment Estimates

Any one Shipping method may have many different Estimates. To support multiple sets of constraints, you can create multiple Estimate records for a specific Shipping Method.

### .13.9.13.1 EditProductStoreShipSetup-Estimate




Create a new Estimate for shipping a product from this store at this screen. Only complete applicable sections.

### .13.9.13.2 link buttons

[New Product Store] [View Estimates] [New Shipment Method] [Add] <B> [Store] [Roles] [Promos] [Catalogs] [Web Sites] [Shipping] [Payments] [Emails] [Surveys] [Override] [Segments] </B>

### .13.9.13.3 Shipment Method (drop-down box)

All the previously-established Shipment Methods are listed on this drop-down box. They were created from the screen 'New Shipment Method.' Select the method upon which this Estimate is based.

### .13.9.13.4 From Geo (drop-down box)

Shipping from this Geographical region. If any Geo is specified, this Estimate will not apply to any shipping from outside of that region.

### .13.9.13.5 To Geo (drop-down box)

Shipping TO this geographical region. If any Geo is specified, this Estimate will not apply to any shipping to a Geo outside of the given region.

### .13.9.13.6 Party

<B>All</B> means that this Estimate is valid for <I>All</I> parties using the system. If a specific Party is named, then this Estimate is just for that Party.

### .13.9.13.7 Role

If <B>All</B>, then this Estimate is valid for <I>All Roles</I> or for any Party Role using it. If there is a Role listed, then the Estimate is only valid for those Parties with that Role.

### .13.9.13.8 Flat Base Percent

One of the essential fields to set if a Flat Base Percent is the basis for how much you are going to charge. Enter a percent value that reflects what the charge will be IF based upon a percent value of the Total sales order. <P> The formula that will then calculate your shipping charges on this basis would be: <br> shipamount = shipamount + (orderTotal * percent)

### .13.9.13.9 Flat Base Price

One of the essential fields to set if 'Flat Base Price' is the basis for how much you are going to charge. Enter a price that reflects what the charge in this estimate will be IF based solely upon this Flat Base. <P> The formula that will then calculate your shipping charges on this basis would be: <br>shipamount = shipamount + price

### .13.9.13.10 Flat Item Price

One of the essential fields to set if Flat Item Price is the basis for how much you are going to charge. Enter a value that reflects what the charge will be per unit item. <P> The formula that will then calculate your shipping charges on this basis would be: <br> shipamount = shipamount + (totalQuantity * price)

### .13.9.13.11 Feature Group

Below surcharge(s) will be added per-product * per-feature.

#### .13.9.13.11.1 Per-Feature Percent

shipamount : shipamount + ((orderTotal * percent) * total feature(s) applied)

#### .13.9.13.11.2 Per-Feature Price

shipamount : shipamount + (price * total feature(s) applied)

### .13.9.13.12 Oversize Unit

Check with your Carrier to establish this value. The number relates to the largest physical size that can be accepted with this Estimate. <P> Each product has these three factors: Height, Width and Depth. Take the height (from the top to the bottom at the highest point) and multiply it times two. <br> Take the width (from the left to the right at the widest point) and multiply it times two. <br> Take the depth (from the front to the rear at the deepest

point) but do NOT double that. <br> Add these three factors together to determine the packages Oversize Value, using the formula : ((height * 2) + (width * 2) + depth). Whatever value derives must not exceed the Oversize Unit amount as entered in this field.

#### .13.9.13.13 Oversize Surcharge

shipamount : shipamount + (# oversize products * surcharge)

#### .13.9.13.14 Weight

##### .13.9.13.14.1 Min-Max (span)

The span is optional. Having this set incorrectly can cause more problems than not having one set at all. Follow the Carrier's lead on this one, if needed. <br> 0 min -> up to max; 0 max -> from min and up

##### .13.9.13.14.2 Unit of Measure (drop-down box)

Unless unit is Each, select a UOM from the drop-down box.

##### .13.9.13.14.3 Per Unit Price

If the shipping cost is based upon weight, the price per unit of weight must be stated here, with the unit of measure properly set, above.

#### .13.9.13.15 Quantity

##### .13.9.13.15.1 Min-Max (span)

The span is optional. Having this set incorrectly can cause more problems than not having one set at all. Follow the Carrier's lead on this one, if needed. <br> 0 min -> up to max; 0 max -> from min and up

##### .13.9.13.15.2 Unit of Measure (drop-down box)

Unless unit is Each, select a UOM from the drop-down box.

##### .13.9.13.15.3 Per Unit Price

If the shipping cost is a Flat Unit Price, state the price per unit here, based upon the Unit of Measure set above.

#### .13.9.13.16 Price

##### .13.9.13.16.1 Min-Max (span)

The span is optional. Having this set incorrectly can cause more problems than not having one set at all. Follow the Carrier's lead on this one, if needed. <br> 0 min -> up to max; 0 max -> from min and up

##### .13.9.13.16.2 Per Unit Price

Set a Per Unit Price. This setting is essential if the Estimate is based upon a Flat Unit Price.

## .13.10 Payments

### .13.10.1 EditProductStore PaySetup

All Payment Settings are shown here. You may delete, edit or create new Settings. This integrates with Accounting and Order managers.

## .13.10.2 link buttons

[New Product Store] [Delete] [Edit] [Create] <B> [Store] [Roles] [Promos] [Catalogs] [Web Sites] [Shipping] [Payments] [Emails] [Surveys] [Override] [Segments] </B>

## .13.10.3 Table with existing payment settings

### .13.10.3.1 Payment Method Type

Credit Card, EFT, etc.

### .13.10.3.2 Service Type

What type of service is available.

#### .13.10.3.3 Service Name

The programmed name to activate this Service.

#### .13.10.3.4 Payment Props

Payment Properties are generally set to Global by default unless otherwise specified.

#### .13.10.3.5 All Prods?

Does this Service work for all Products? Yes or No.

### .13.10.4 Tool to edit or start methods

When [Edit] is selected from the table above, the appropriate fields are populated to match the selected item. Click [Update] to take the changes to the table.

#### .13.10.4.1 Payment Method Type (drop-down box)

Typical Payment Methods might include: <p><B> --- <br> Billing Account <br> Certified Check <br> Cash on Delivery <br> Company Account <br> Company Check <br> Credit Card <br> Electronic Funds Transfer (EFT) <br> Gift Card <br> Gift Certificate <br> Money Order <br> Offline Payment <br> PayPal <br> Personal Check <br> WorldPay </B>

#### .13.10.4.2 Service Type (drop-down box)

Typical Service Types might include: <p><B> External Payment (no service) <br> Payment Auth Verification Service <br> Payment Authorization Service <br> Payment Capture Service <br> Payment Credit Service <br> Payment Re-Authorization Service <br> Payment Refund Service <br> Payment Release Authorization Service</B>

#### .13.10.4.3 Service Name

The programmed name to activate this Service.

#### .13.10.4.4 Payment Properties

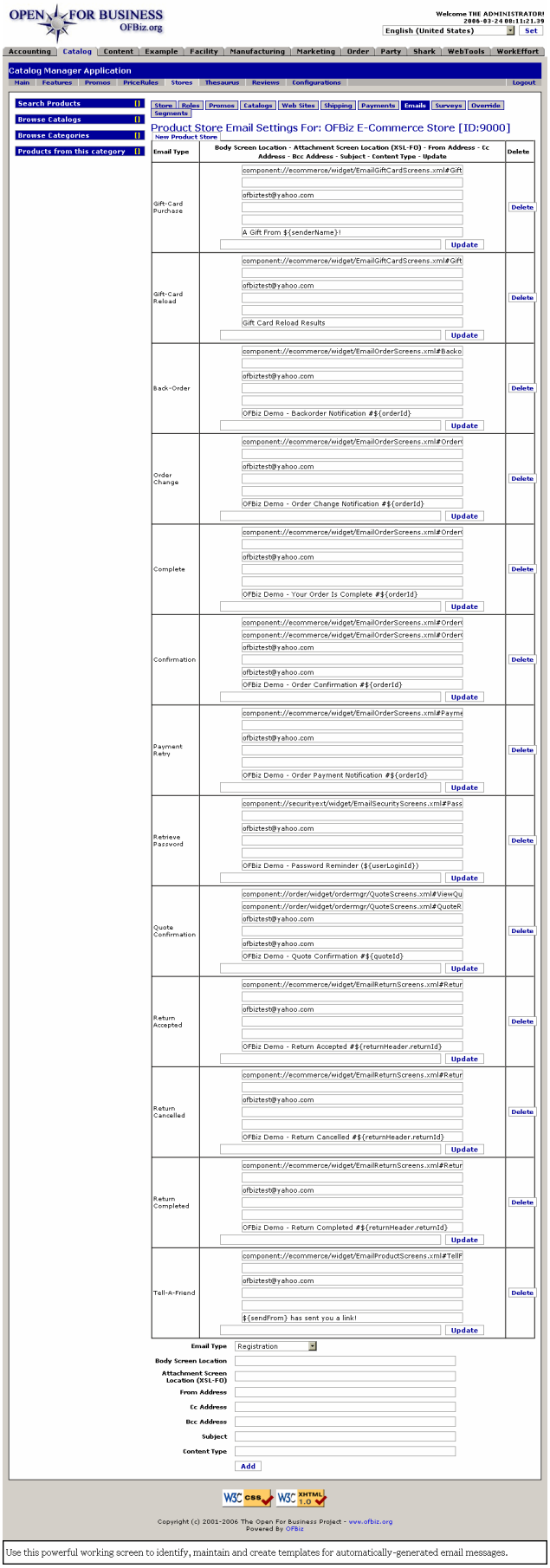
Defaults to Global.

#### .13.10.4.5 Apply to All Products? (Y/N)

Does this Service apply to all products? If not, select N.

## .13.11 Emails

### .13.11.1 EditProductStoreEmails




Use this powerful working screen to identify, maintain and create templates for automatically-generated email messages.

## .13.11.2 link buttons

[New Product Store] [Update] [Delete] [Add] <B> [Store] [Roles] [Promos] [Catalogs] [Web Sites] [Shipping] [Payments] [Emails] [Surveys] [Override] [Segments] </B>

## .13.11.3 Table of existing email settings

### .13.11.3.1 Email Type

Used to identify the purpose of the email.

### .13.11.3.2 Body Screen Location

The top text box within the frame indicates where the template text and commands exist on your server. You may edit this content here, then click on [Update].

### .13.11.3.3 Attachment Screen Location (XSL-FO)

This is in the second text box from the top of the section. It gives the address on your server where the email program will find locations for attachments to these automated messages. You may edit this content here, then click on [Update].

### .13.11.3.4 From Address

In the third text box from the top in this section is your originating email address, the one which the addressee may respond to. You may edit this content here, then click on [Update].

### .13.11.3.5 CC Address

In the 4th text box from the top of each frame is the address of anyone else besides the recipient who should be getting a copy of this email. For example, on shipping you might CC the shipping department and the carrier. You may edit this content here, then click on [Update].

### .13.11.3.6 BCC Address

In the 5th text box from the top of each frame is the address of anyone else who should be getting a copy of this email but without the primary recipient's awareness. You may edit this content here, then click on [Update].

### .13.11.3.7 Subject

Found in the text box next to the bottom in the frame, this will be the content of the Subject line on the email. You may edit this content here, then click on [Update].

### .13.11.3.8 Content Type

The bottom text box within each frame is used to specify Content Type, if needed. You may edit this content here, then click on [Update].

## .13.11.4 Tool to add other Emails

### .13.11.4.1 Email Type (drop-down box)

Typical Email Types might include: <p> <B> Registration <br> Confirmation <br> Complete <br> Back-Order <br> Order Change <br> Payment Retry <br> Return Accepted <br> Return Completed <br> Return Cancelled <br> Retrieve Password <br> Tell-A-Friend <br> Gift-Card Purchase <br> Gift-Card Reload <br> Quote Confirmation </B>

### .13.11.4.2 Body Screen Location

Enter the location where the template text and commands exist on your server.

### .13.11.4.3 Attachment Screen Location (XSL-FO)

Enter the electronic location of any attachments that are to go out with the email message.

### .13.11.4.4 From Address

This will be your company email address to which the recipients can reply.

#### .13.11.4.5 Cc Address

Enter the email address of anyone else besides the primary recipient who should be getting a copy of this email. For example, on shipping you might CC the shipping department and the carrier.

#### .13.11.4.6 Bcc Address

Enter the address of anyone who should be getting a copy of this email without the awareness of the primary recipient. This could be the QA department, the commissioned salesperson or someone monitoring performance.

#### .13.11.4.7 Subject

Enter the Subject Line as it will appear in the recipient's email. Note the examples in the table shown above.

#### .13.11.4.8 Content Type

If the Content Type needs to be noted, this is the place.

## .13.12 Surveys

### .13.12.1 EditProductStoreSurveys

Surveys can be started or deleted here in the Store. Survey content is created at the Content manager.

## .13.12.2 link buttons

[New Product Store] [Delete] [Add] <B> [Store] [Roles] [Promos] [Catalogs] [Web Sites] [Shipping] [Payments] [Emails] [Surveys] [Override] [Segments] </B>

## .13.12.3 Table of existing surveys

Click on the description under the Survey column and you will be taken to the Content Manager - Surveys tab for editing the survey.

### .13.12.3.1 Type

Surveys are grouped into Types; this column indicates which type this survey belongs to.

### .13.12.3.2 Name

Not always assigned a Name; if there is one it will be here.

### .13.12.3.3 Survey

Actually the Survey ID; click on the link to go to the Content Manager Survey Edit screen.

### .13.12.3.4 Product

If there is a Product associated with this Survey, it will be given here.

### .13.12.3.5 Category

Besides the Type of survey, here are the specific Groups of surveys identified, when they exist.

### .13.12.3.6 From Date

When the Survey was established for this store.

### .13.12.3.7 Sequence #

If there is a sequencing system in place, this is the sequence number for this survey.

## .13.12.4 Tool to Create Store Survey

### .13.12.4.1 Type (drop-down box)

Select from one of the following types: <B><P> Add-To Cart <br> Check-Out <br> Customer Profile <br> General Poll <br> Purchase Order Item Placement <br> Purchase Order Placement <br> Random Poll <br> Sales Order Placement </B>

### .13.12.4.2 Group Name

If a survey group is established, enter the name here.

### .13.12.4.3 Survey (drop-down box)

This is the Survey ID. These are actually created in the Content Manager Surveys tab. Existing surveys populate the drop-down box. Select the appropriate one.

### .13.12.4.4 Product ID

If there is a product associated with the Survey, identify it here.

### .13.12.4.5 Category ID (drop-down box)

Select an applicable product Category ID from the drop-down box.

### .13.12.4.6 From Date (popup calendar)

Defaults to Now. Enter a future effectivity date if preferred.

### .13.12.4.7 Thru Date (popup calendar)

Optional; this would be the date the Survey should expire or terminate.

### .13.12.4.8 Survey Template Path

Server location of the Survey Template.

### .13.12.4.9 Result Template Path

Server location of the Results Template.

### .13.12.4.10 Sequence

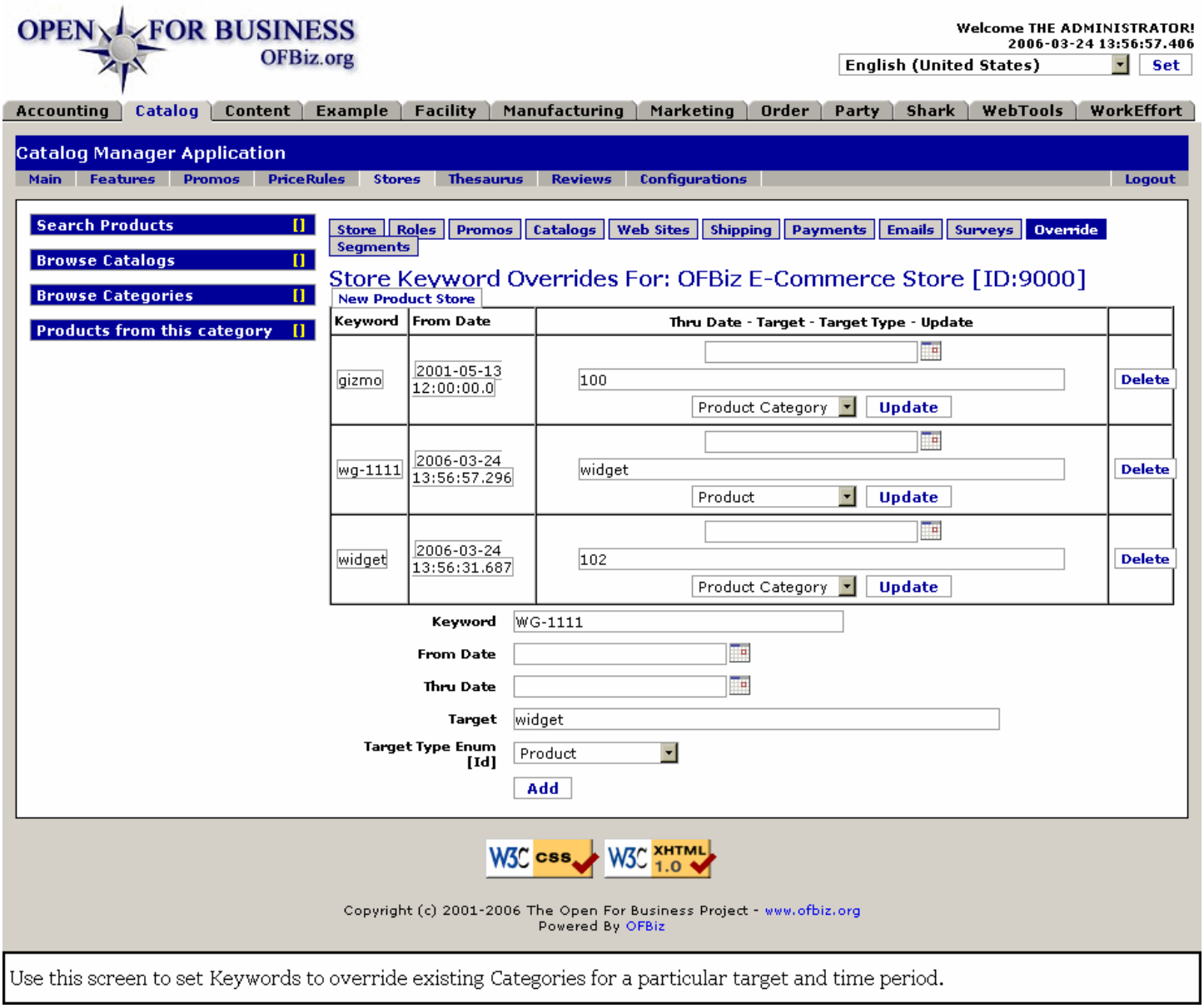
If there is a sequence system, enter the sequence number here.

## .13.13 Override

(Product Store Keyword Override Settings)

### .13.13.1 editProductStoreKeywordOvrd

id:[DOCCAT1820] image:




Use this screen to set Keywords to override existing Categories for a particular target and time period.

### .13.13.2 link buttons

[New Product Store] [Update] [Delete] [Add] <B> [Store] [Roles] [Promos] [Catalogs] [Web Sites] [Shipping] [Payments] [Emails] [Surveys] [Override] [Segments] </B>

### .13.13.3 Table of existing overrides

#### .13.13.3.1 Keyword

The Keyword that will override the Category.

#### .13.13.3.2 From Date

When the keyword will begin to override the category.

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

Date and time after which the keyword will no longer be overriding the category. You can change or set this date from within the table.

#### .13.13.3.4 Target

This is the category or the product within a category that will be brought up in any search for the overriding keyword. You can edit this within the table.

#### .13.13.3.5 Target Type (drop-down box)

The Target Type is essentially the category which holds the target which is being overridden. This can be changed within the table.

### .13.13.4 Tool to create new override settings

#### .13.13.4.1 Keyword

The Keyword that will override the Category.

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

When the keyword will begin to override the category.

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

Date and time after which the keyword will no longer be overriding the category.

#### .13.13.4.4 Target

This is the category or the product within a category that will be brought up in any search for the overriding keyword.

#### .13.13.4.5 Target Type Enum ID (drop-down box)

The Target Type is essentially the category which holds the target which is being overridden. Typical types might include: <p><B> Product Category <br> Product <br> OFBiz URL <br> Absolute URL</B>

## .13.14 Segments

### .13.14.1 ViewProductStoreSegments

Click the Segment ID to edit the Segment in the Marketing Manager - Segments tab where these are created.

### .13.14.2 link buttons

[New Product Store] [New Segment] [Delete] <B> [Store] [Roles] [Promos] [Catalogs] [Web Sites] [Shipping] [Payments] [Emails] [Surveys] [Override] [Segments] </B>

### .13.14.3 Discussion

Whether you click on [New Segment] or click to [Edit] a Segment Group, you are taken to the Marketing Manager > Segment tab for the task. See Marketing Manager for more details.

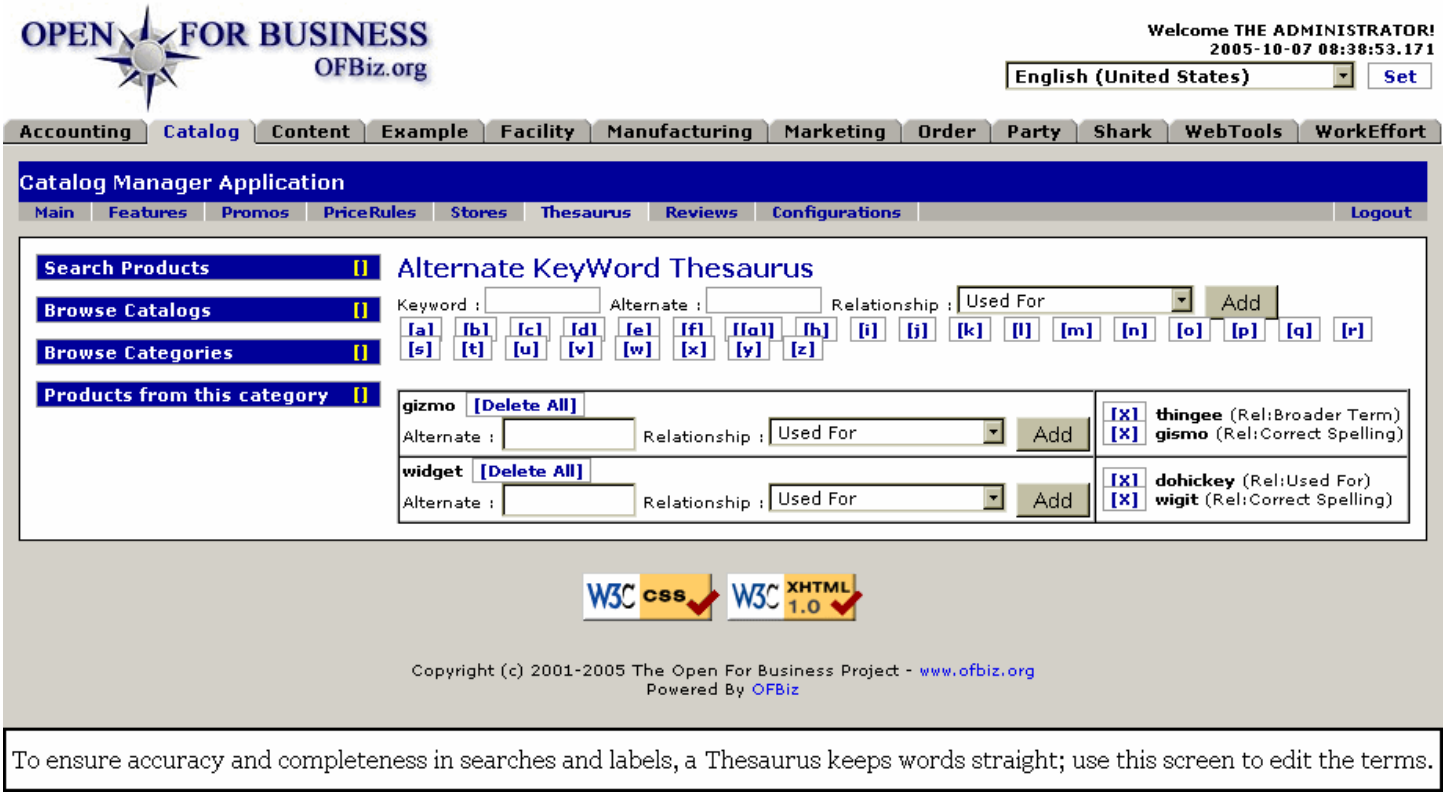
## .13.15 Create New Product Store

When you click on the [Create New Product Store] link, you are taken to the same screen as Edit Store but without the other buttons (Roles, Promos, Catalogs, Etc.) as seen at Edit Store.

# .14 Tab - Catalog Thesaurus

## .14.1 editKeywordThesaurus

id:[DOCCAT1836] image:




To ensure accuracy and completeness in searches and labels, a Thesaurus keeps words straight; use this screen to edit the terms.

## .14.2 link buttons

[Delete All] [X] [Add] [a] [b] [c] ...

## .14.3 Add to Alternate KeyWord Thesaurus

This powerful tool is very simple to use. As you enter a term, select its relationship to the alternate term using the drop down box choices. Once the Add button is selected, that term now exists in its established relationship to the other term. <p> The terms will be used by searches to find items which might be called other things by different people. For example, foreign terms or different spellings (color - colour) might prevent a search from being successful. Perhaps more powerfully, this method of expanding relationships can open more possibilities for sales through suggesting items which might not have been considered by the customer.

### .14.3.1 Keyword

The reference keyword.

### .14.3.2 Alternate

The spelling of a word as it might be sought; this term is being related to the keyword.

### .14.3.3 Relationship (drop-down box)

Choices could include: <p> Used For <br> Use Instead <br> Correct Spelling <br> Narrower Term <br> Broader Term <br> Micro-thesaurus Term <br> Related Term <br> Scope Notes <br> Language: Spanish <br> Language: French 

## .14.4 Alphabet letter shortcut

[a] [b] [c] ...

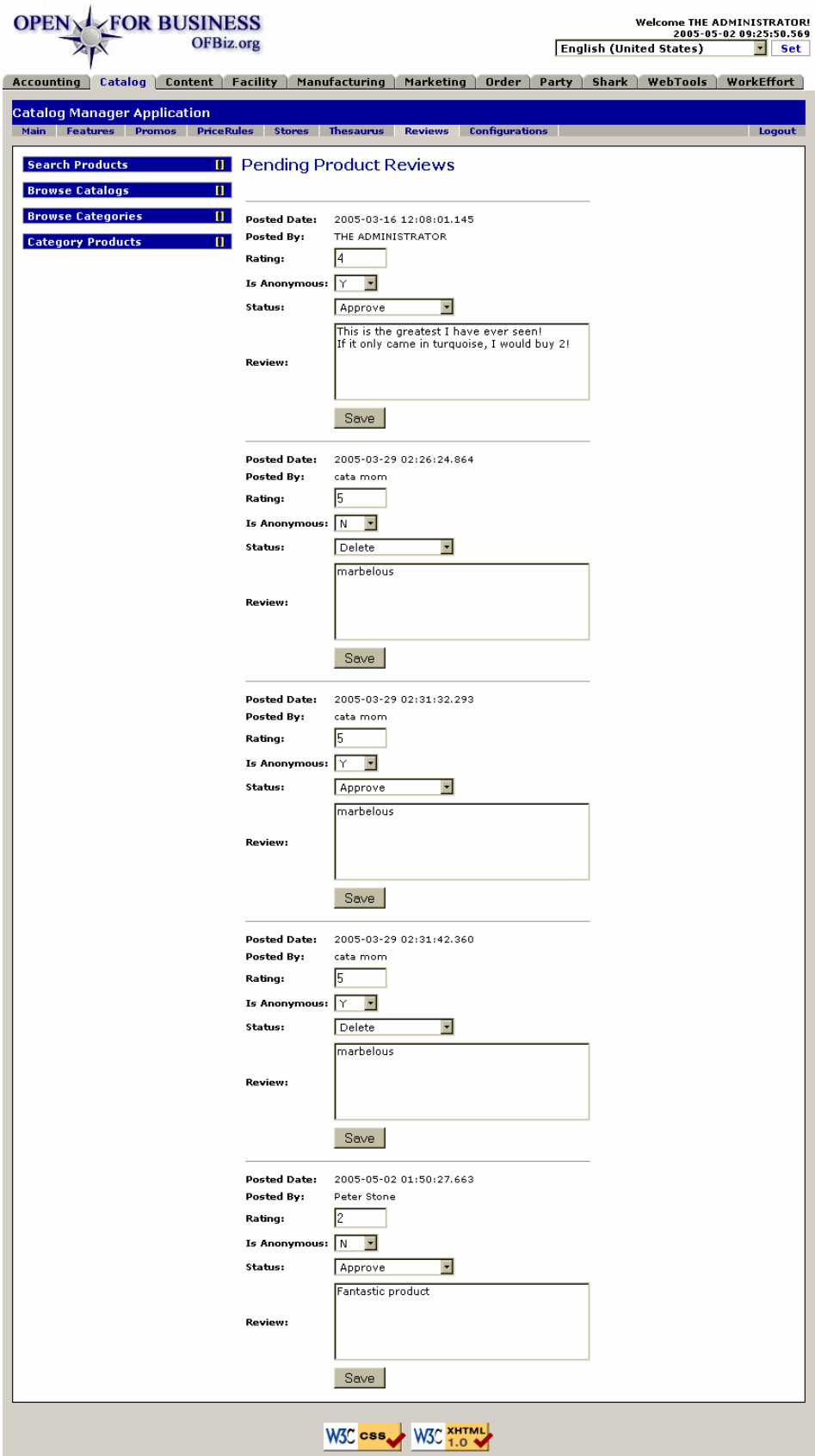
## .14.5 Table to edit existing keywords

Click the [X] to delete a specific term. Use the space to add another relative term for this keyword, specify the Relationship from the drop down box, then click [Add].

# .15 Tab - Catalog Reviews

Pending Product Reviews are those reviews submitted which are still needing approval before they can be released for customers to see at the business site.

## .15.1 pendingReviews




As the Reviews are received, they are gathered here for Approval or Deletion. Press [Save] after changing the status.

## .15.2 link buttons

[Save]

## .15.3 Posted Date

When the Review was posted.

## .15.4 Posted By

Who posted the Review.

## .15.5 Rating

How they rated the product.

## .15.6 Is Anonymous (Y/N)

If their Review is published, do they wish to remain anonymous?

## .15.7 Status (drop-down box)

Choices are:<p> Pending Approval <br> Approved <br> Delete 

## .15.8 Review

Text as entered by the reviewer is shown here. You can make editorial revisions if needed. For example, the word 'marbelous' in a review could be changed to say 'Marvelous' without compromising the integrity of the review.

# .16 Tab - Configurations

## .16.1 FindProductConfigItems

id:[10960] image:

Existing Configurations are presented upon opening the Configurations tab; [Edit] existing or [Create New Config Item] from here.

## .16.2 link buttons

[Create New Config Item] [Edit]

## .16.3 Table of Existing Configurations

Any existing configurations developed for products within this Catalog are presented here. This screen only appears when the Configurations tab is first selected. After selecting a specific Configuration to work with, you will need to reselect the Configurations Tab to return to this list.

### .16.3.1 Config Item

The ID and Name of the Configuration Item.

### .16.3.2 Type

Called the ProductConfigItemType when selected from a drop-down box during the creation of a Configuration Item, this might be 'Single Choice' or 'Multi Choice.'

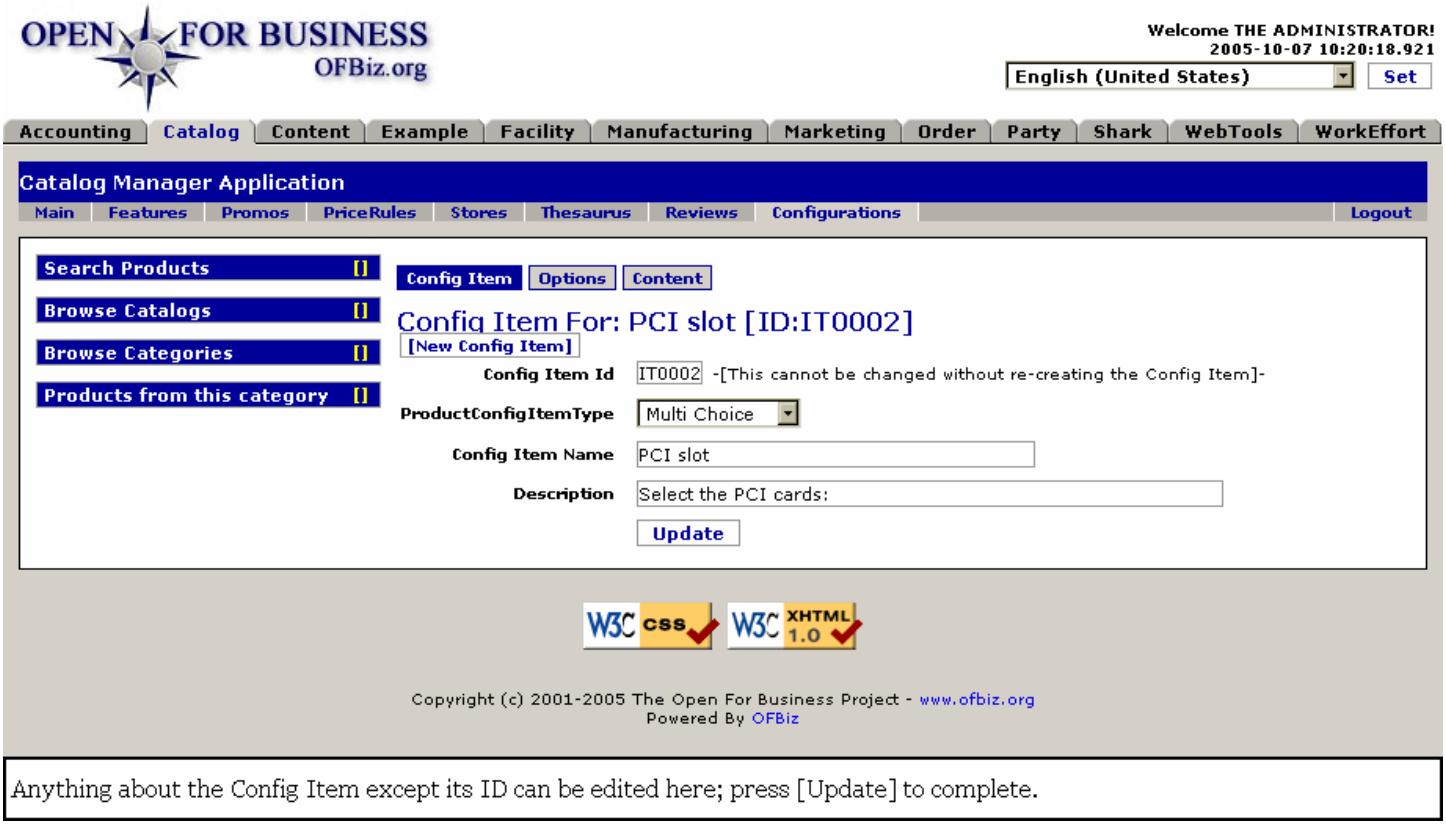
### .16.3.3 Description

What distinguishes this Item from others; what it is intended to accomplish. Could also be a leading question to the next step in the configuration process.

## .16.4 Edit an Existing Configuration

### .16.4.1 EditProductConfigItem

id:[10974] image:




Anything about the Config Item except its ID can be edited here; press [Update] to complete.

### .16.4.2 link buttons

[New Config Item] [Update]  [Config Item] [Options] [Content] 

### .16.4.3 Config Item ID

Cannot be changed. Was assigned at creation, and can only be deleted as an Item.

### .16.4.4 ProductConfigItemType (drop-down box)

Selections at the present time include: <B><P> Single Choice <br> Multi Choice </B>

### .16.4.5 Config Item Name

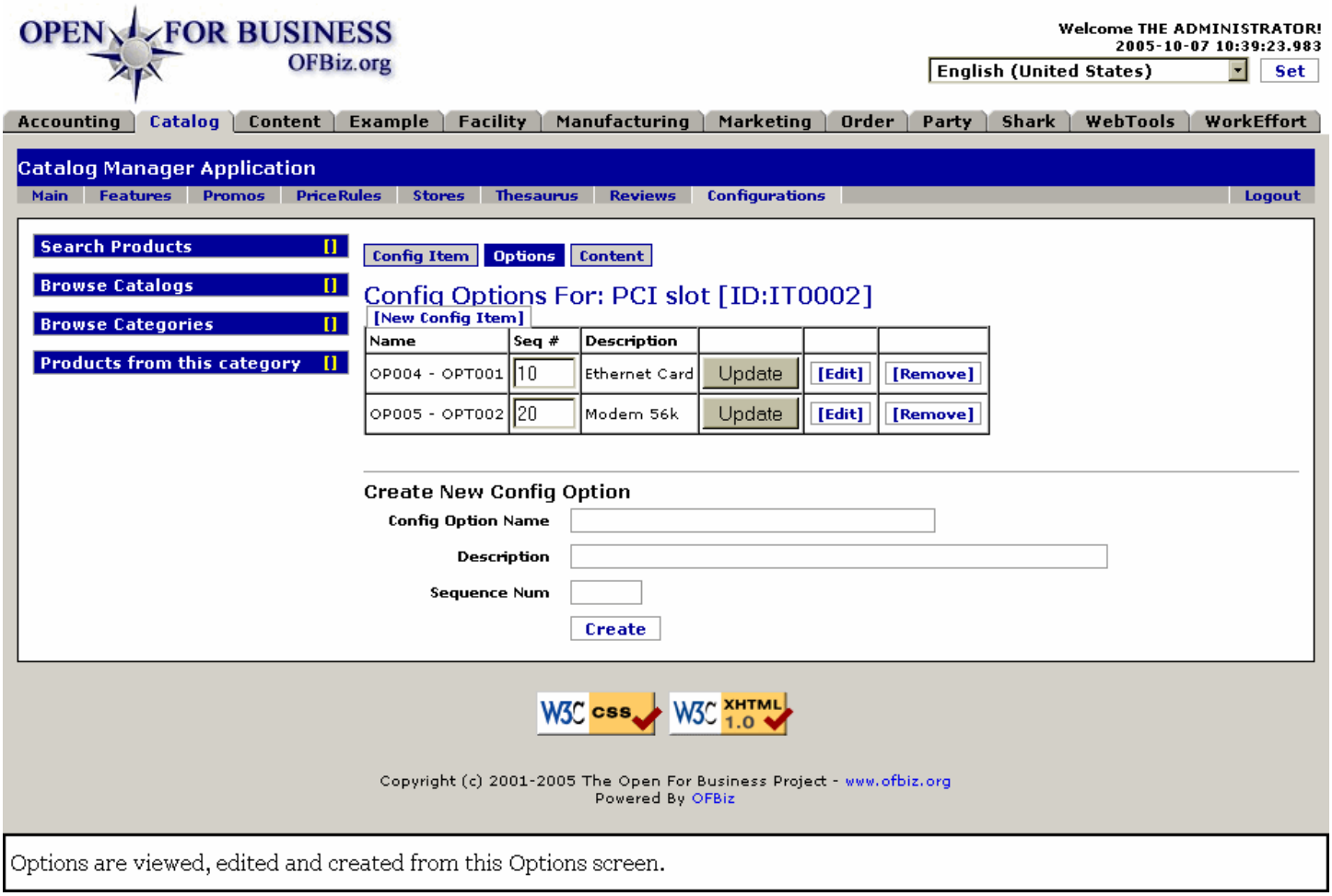
Very short name to differentiate this Item from others.

### .16.4.6 Description

Short but complete description about the purpose or function of this item.

### .16.4.7 Options Tab

#### .16.4.7.1 EditProductConfigOptions




Options are viewed, edited and created from this Options screen.

### .16.4.7.2 link buttons

[New Config Item] [Update] [Edit] [Remove] [Create] [Config Item] [Options] [Content]

### .16.4.7.3 Table of Existing Options

#### .16.4.7.3.1 Name

The first part of the name is the ID for the component, the second part is the Option ID. Thus, OP004 identifies the Ethernet Card, and the OPT001 specifies option.

#### .16.4.7.3.2 Seq #

Sequence Number changes are updated by pressing the [Update] button; press the [Edit] button to change other aspects of the option.

#### .16.4.7.3.3 Description

Describes what it is.

### .16.4.7.4 Create New Config Option tool

#### .16.4.7.4.1 Config Option Name

Be very brief but descriptive.

#### .16.4.7.4.2 Description

Explain in a few words what is unique about this Option.

#### .16.4.7.4.3 Sequence Num

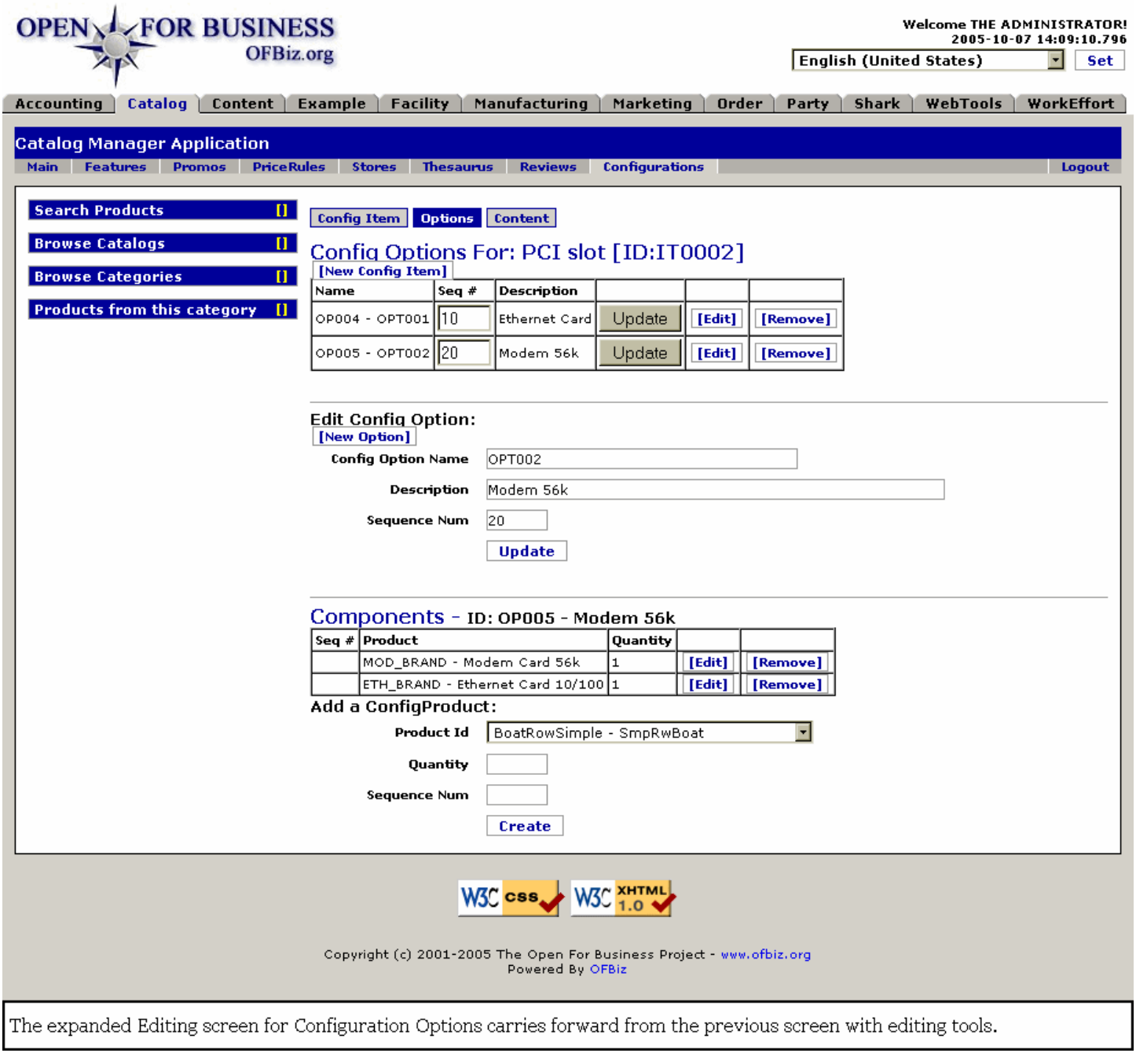
Optional; use if a sequencing system is in place.

### .16.4.7.5 Edit Existing Config Option

Whether creating a new or editing an existing Option, this is the expanded screen in which you will work.

#### .16.4.7.5.1 EditProductConfigOptions-edit

id:[11011] image:




The expanded Editing screen for Configuration Options carries forward from the previous screen with editing tools.

#### .16.4.7.5.2 link buttons

[Update] [Edit] [Remove] [Create]

#### .16.4.7.5.3 Components section

Note: other sections of this screen are discussed above.

.16.4.7.5.3.1 Table of details in product option

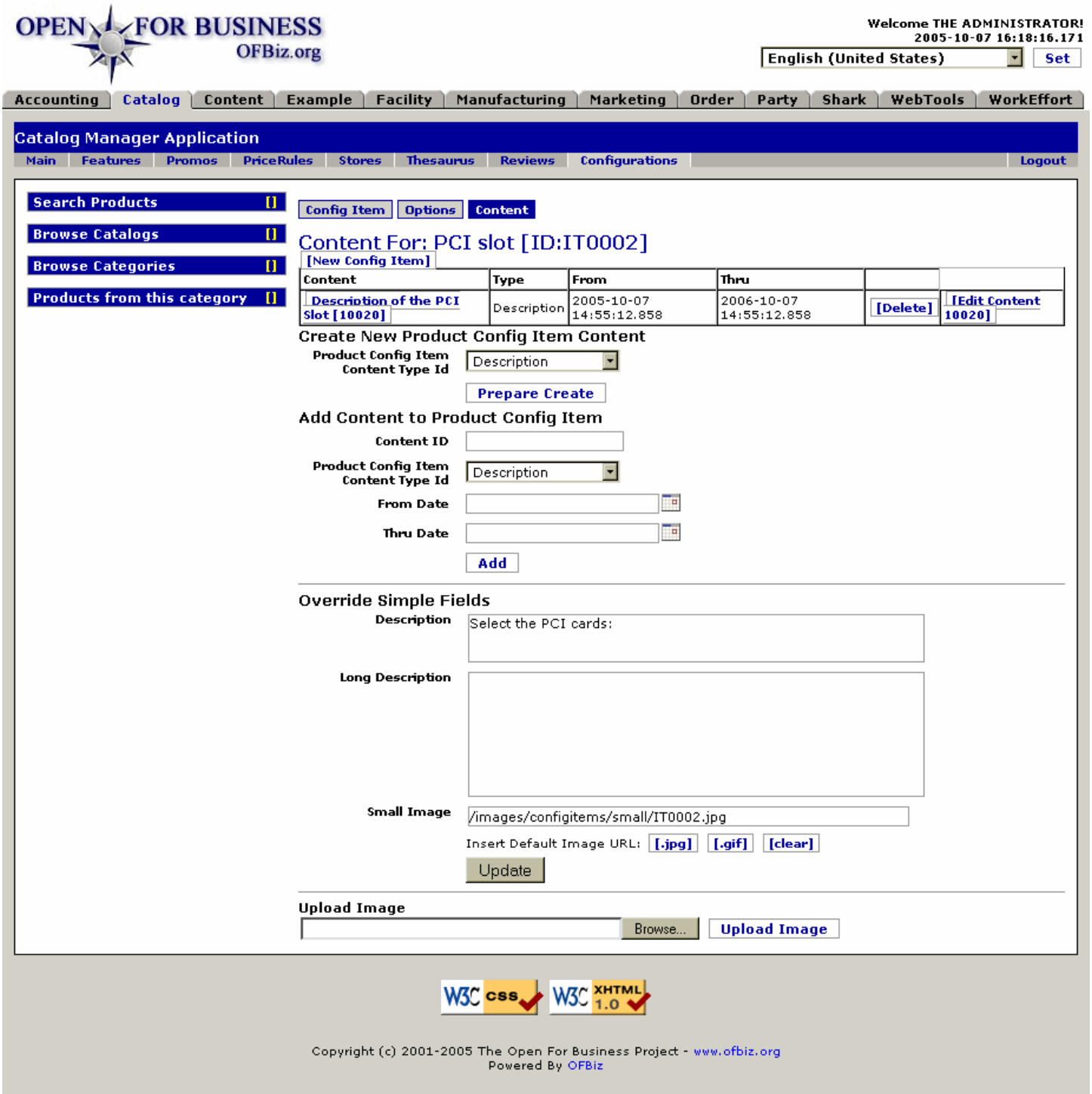
<p><B> Sequence # <br> Product <br> Quantity </B>

.16.4.7.5.3.2 Add a Config Product

<p><B>Product ID (drop-down box) <br> Quantity <br> Sequence num </B>

## .16.4.8 Update Content of Existing Configuration

### .16.4.8.1 EditProductConfigItemContent




Update the Content of an existing Configuration Option from this screen.

### .16.4.8.2 link buttons

[New Config Item] [Delete] [Edit Content Nnnn] [Prepare Create] [Add] [Update] [Browse] [Upload Image] [Clear] [.jpg] [.gif]  [Config Item] [Options] [Content] 

### .16.4.8.3 Table of Existing Content

#### .16.4.8.3.1 Content

Click on this descriptive title to go to the edit screen with this content.

#### .16.4.8.3.2 Type

Single Choice or Multi-Choice

#### .16.4.8.3.3 From

Date of creation or effectivity.

#### .16.4.8.3.4 Thru

Date of expiration; leave blank unless the Content needs to terminate.

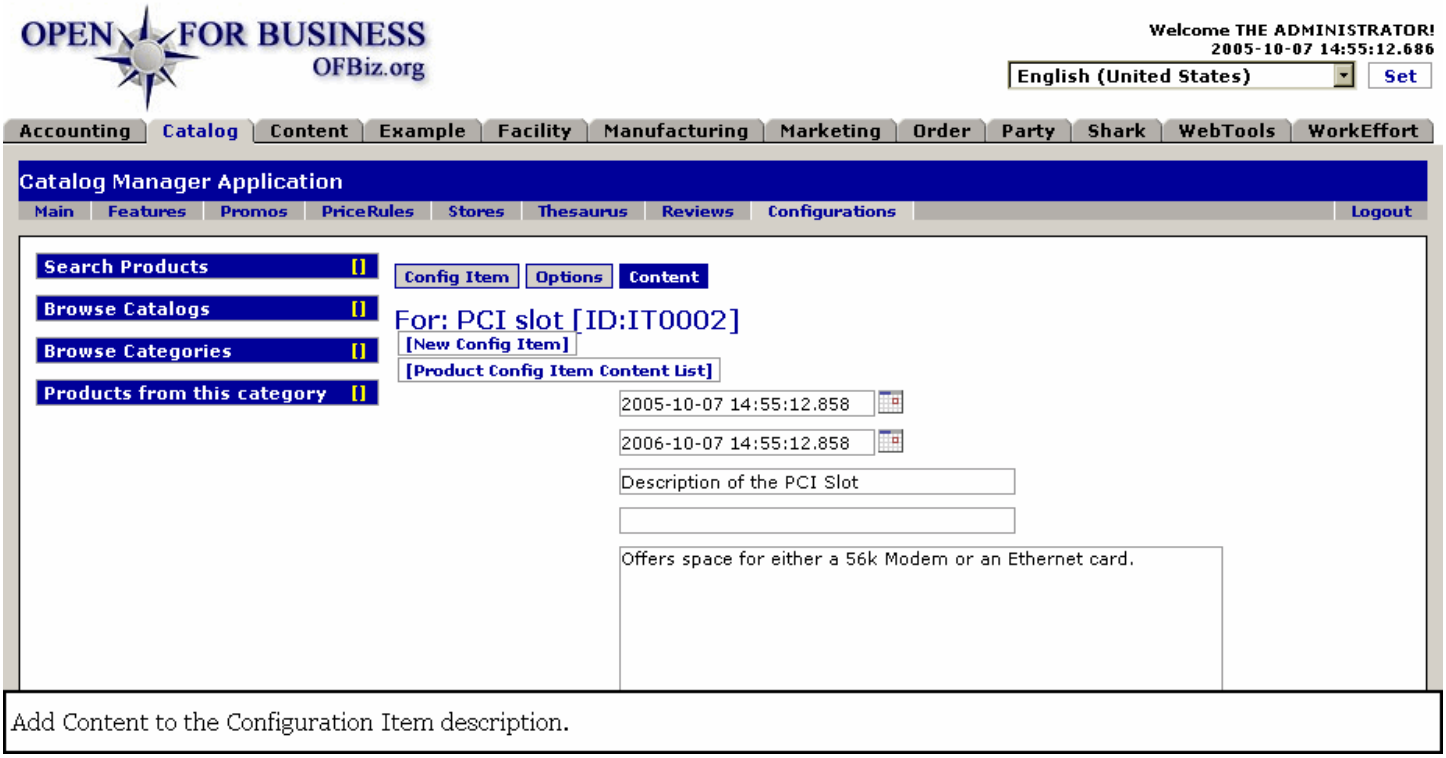
### .16.4.8.4 Create New Product Config Item Content

#### .16.4.8.4.1 Product Config Item Content Type Id

Drop-down box includes these choices:<B> <p> Description <br> Description - long <br> Image <br> Instructions </B>

#### .16.4.8.4.2 prepareAddContentToProductConfigItem

id:[11827] image:




Add Content to the Configuration Item description.

#### .16.4.8.4.3 link buttons

[New Config Item] [Product Config Item Content List] [Submit Query] <B> [Config Item] [Options] [Content] </B>

### .16.4.8.5 Add Content to Product Config Item

#### .16.4.8.5.1 Content ID

Name or descriptive title for the Content.

#### .16.4.8.5.2 Product Config Item Content Type Id (drop-down box)

Single Choice or Multi-Choice are presently available.

#### .16.4.8.5.3 From Date (pop-up calendar)

Date of creation or effectivity.

#### .16.4.8.5.4 Thru date (pop-up calendar)

Optional; content will expire on the date you enter.

### .16.4.8.6 Override Simple Fields

#### .16.4.8.6.1 Description

Like a label or title.

#### .16.4.8.6.2 Long Description

What you wish to say about the Configuration Item.

#### .16.4.8.6.3 Small Image

'Insert Default Image URL:'

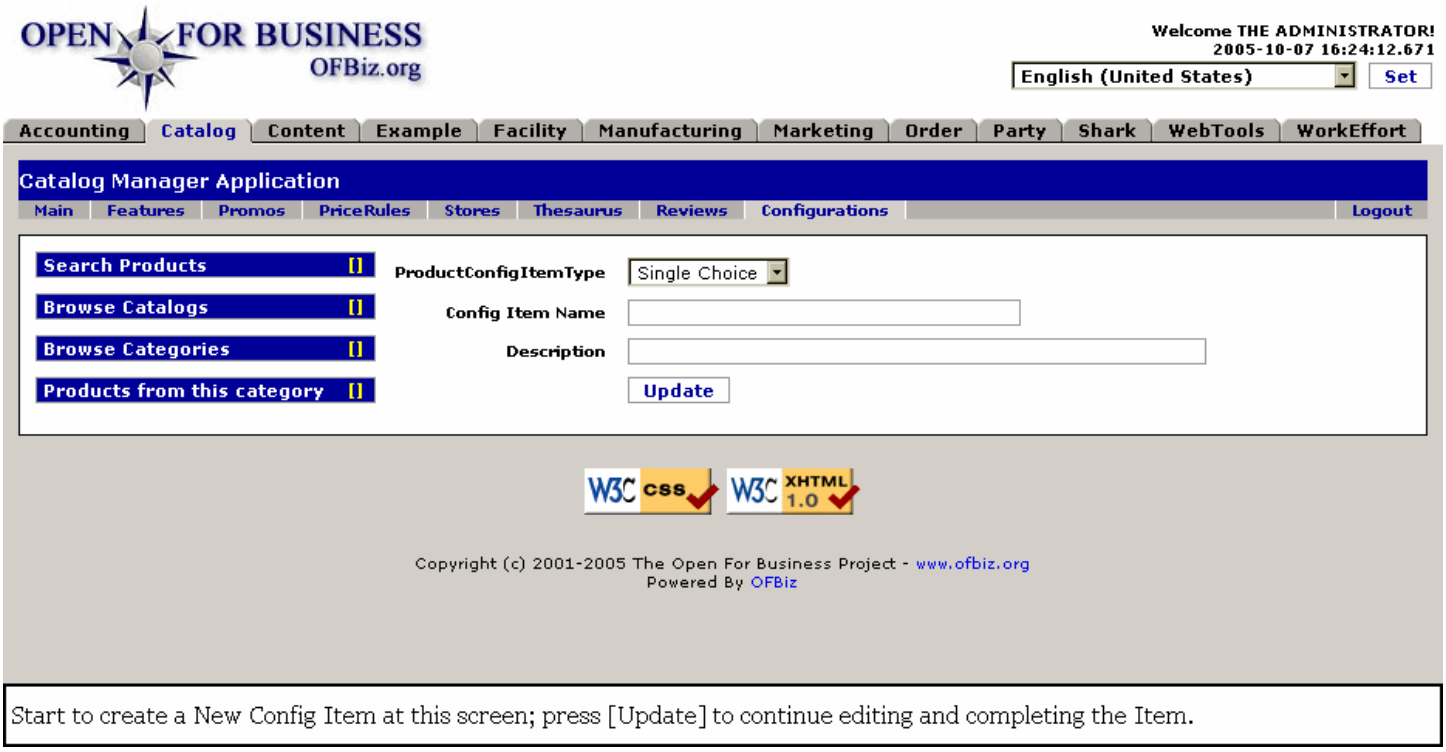
### .16.4.8.7 Upload Image

Either enter the path to the image file, or use the Browse search tool to locate the file. Then click [Upload Image].

## .16.5 Create a new Product Config

### .16.5.1 EditProductConfigItem-new

id:[10968] image:




### .16.5.2 link buttons

[Update]

### .16.5.3 Product Config Item Type (drop-down box)

Presently limited to Single Choice or Multi-Choice.

### .16.5.4 Config Item Name

The label which will become like an ID for this new Configuration Item.

### .16.5.5 Description

Describe it to differentiate from any other.

## .16.6 Testing New Configurations

### .16.6.1 At the ECommerce Site

#### .16.6.1.1 View Product Page

To test your configuration, go to the related product page at the ecommerce site and see the results of your configuration process. In the bottom of the page a form with the questions or options available will appear.

#### .16.6.1.2 Compare Content with Configuration

The messages, images, or instructions are taken from the content attached to the questions you have created as outlined in the processes described above. Check that the results match your expectations when you created the content configuration questions and dialog

#### .16.6.1.3 Check the Prices

The options prices are derived from the product's prices attached to the selected options and they are used to determine the total configuration price. That final price is shown when the customers click over the 'verify' link. You should confirm that the pricing process deals appropriately with the pricing guidelines.

### .16.6.2 Warehouse and Manufacturing Operations

#### .16.6.2.1 Check the Order Detail Page

When an order is created for a configured product, a production run is automatically created and linked to the order line. You can see it in the order detail page. The production run will take components from the warehouse for each of the products linked to the selected options.

#### .16.6.2.2 Check for Manufacturing Tab

In creating a production run, the product is linked to a routing; this is done in the manufacturing component and then seen under the new 'manufacturing' tab in the product's pages.