

Manager Reference: Party

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.1 Introduction to Party Manager

The Party Manager administers information about Parties. Each party is given a specific Party ID; groups of parties are assigned a Group ID. A 'Party' is a person, a company, an organization or a group of parties. Sometimes a party is described as a vendor, an employee, et cetera, but these are just 'roles' that a party may be associated with.

.1.1 Conventions in this document

Within this document you will notice several conventions used to reduce the need for explanatory text. [brackets] surround labels seen in the application which initiate an action or take you to another screen. (Parens) within a list denote characteristics of a field such as (radio buttons) or (drop-down box). * indicates a required field. >> means that the action to the left leads or takes you to the result on the right. For example: [Show All Records] >> Table of parties means that if you click on [Show All Records], the next screen seen will be a Table of parties. Outline presentation is used to denote subordination for greater detail.

.1.1.1 Link Buttons

Link Buttons are the areas on a screen which are Active as links to an action or another screen. They usually show up as colored letters or in small boxes or bracketed like [this]. Most of the Link Buttons are collected into an item called 'link buttons' which generally is positioned immediately following the screen capture of the active screen where those buttons are found.

.1.1.2 PopupCalendar



.1.1.3 Popup Calendar

Most of the date fields in the Party Manager (in fact, throughout OfBiz) provide a popup calendar which allows you to find and click upon a viewed calendar date. The time is usually defaulted to the current time, regardless of date; that can be edited later if need be. However, when the date is to entered manually, you will see the format specified to the right of the box. Usually the format will be yyyy-MM-dd. To change to a previous year, click on the << button. To change to a previous month, click on the < button. To change to a future month, click on the > button. To change to a future year, click on the >> button. As soon as you click on the date, the date (and possibly the time) will be entered into the field associated with the popup calendar. To cancel the calendar without entering a date, click on the X in the upper right-hand corner of the popup.

.1.2 Discussion of the Tabs

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

.1.3 Links from Other Managers

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

.2 Main

.2.1 Discussion

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

.2.2 FindParty

id:[14095] image:

The screenshot displays the Party Manager Application interface. At the top left is the logo for "OPEN FOR BUSINESS OFBiz.org". At the top right, it says "Welcome THE ADMINISTRATOR!" with the date "2006-05-03 08:01:16.203" and a language dropdown set to "English (United States)". A navigation bar contains tabs for Accounting, Catalog, Content, Example, Facility, Manufacturing, Marketing, Order, Party (selected), Shark, WebTools, and Work Effort. Below this is a sub-navigation bar for the Party Manager Application with tabs for Main, Find (selected), Create, Communications, Visits, Classifications, Security, and Logout. The main content area is titled "Find Party" and includes a "Hide Fields" and "Lookup Party" link. The "Contact Information" section has radio buttons for "None", "Postal", "Telecom", and "Other". Below are input fields for "Party ID", "User Login", "Last Name", "First Name", and "Party Group Name". A "Role Type" dropdown menu is set to "Any Role Type". At the bottom of the form are "Lookup Party" and "Show all records" buttons. Below the form is a "Parties Found" section with a table header: "Party ID", "User Login", "Name", and "Type". The table content shows "No parties found." and a "Create New" button. At the bottom of the page are logos for W3C CSS and W3C XHTML 1.0, and a copyright notice: "Copyright (c) 2001-2006 The Open For Business Project - www.ofbiz.org Powered By OFBiz".

The opening screen when you select the Party Manager presents options for your search under the Find tab.

.3 Find

.3.1 Find - a Discussion

This function will be used whenever you need to work with a party (individual or group) and do not have his ID number. Once the Party is identified, you can obtain all the information available in the database about the party. You may also update the data associated with the party: a change of address, an update to a customer's credit card number, etc. <P>NOTE: The Party you find here is then maintained through the system as you select another function -- [Role], [Communication], [Contact List], etc., or another Tab -- Visits, Security, etc. Come back to Find to identify another Party for working in any of the other functions of the Party Manager.

.3.2 Find Party

.3.2.1 Discussion

The objective here is to obtain a specific Party ID number or to get to specifics about a party. You may search by ID number or the LoginID, his name, or any of the fields shown. After entering what you know, click on Lookup Party(s) and all parties matching the entered criteria will be returned. <P>For example, if you only know that the party's last name is Jones, enter Jones in the Last Name field and then click [Lookup Party(s)]; every Jones in the system will be displayed in a table. From the table you might be able to discern which Jones you needed to find. Search fields vary depending upon the Contact Info radio button selected; the default is None. Contact Information means what primary means are used to get in touch with the party. If you know his phone number but not his city, click on Telecom and enter the number, for example. Below we list the fields included in each of the 4 contact categories.

.3.2.2 findparty-post



Party Manager Application

Find Party

[Hide Fields](#) [Lookup Party](#)

Contact Information : None Postal Telecom Other

Party ID :

User Login :

Last Name :

First Name :

Party Group Name :

Role Type :

Address 1 :

Address 2 :

City :

State/Province :

PartyPostalCode :

[Lookup Party](#) [Show all records](#)

Parties Found

Party ID	User Login	Name	PartyPostalCode	Type
No parties found. Create New				



Party search for those parties with a Postal address in their contact information.

.3.2.3 link buttons

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

.3.2.4 Contact Info

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

.3.2.4.1 None

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

.3.2.4.1.1 Party ID

This is the primary identification number or name used in the System to uniquely identify the person, party or group. It could be just letters, as in <i>admin</i>. It could be a 5-number set automatically generated by the system, such as <i>10030</i>. <P> The system will accept partial User IDs as in Last Name. You may enter the

partial User ID of '101', and it will return a list including 10101, 10102, 10103,<P> If you already know the Party ID, your search is easy. Put in those letters or numbers or combination (<i>John32</i>), click on the link [Lookup Party], and you have them!

.3.2.4.1.2 User Login

When someone (a Party) logs into the System, they might be entering as a customer, as the senior Administrator, as the Blog Editor, in any of their different Roles. By having a different User Login, the system is able to respond to them appropriately. <P> For example, as the Administrator, they might have unlimited authority to make changes in the System, but if they tried to order products for delivery to their own home, the System might not have the address and account data associated with a Customer role. Each Role for a Party, then, should have its own User Login.<P> For the purposes of Search in the Find Party function, however, User Login might be remembered while Party ID was forgotten; using the User Login you might be able to find the Party in this instance.

.3.2.4.1.3 Last Name

Also known as the Family Name. <P> If you enter only a few initial letters, the system will return all instances of those letters in that sequence. For example, with 'er' entered, every last name containing an ER is returned, wherever that combination occurs within the name. This field is case insensitive. You could enter 'er', or 'ER', or 'eR' and the returns would be the same. See the following screen capture for the results of a search for 'Er'. <P> Results also depend upon whether the search is entered from the 'None' screen or 'Postal' screen, etc. If there is no Postal information about a Party, even if a Party exists, it will not be returned in a search on the 'Postal' screen. If unsure, search from the 'None' screen to avoid false negatives.

.3.2.4.1.3.1 Found from 'Er' search

id:[13611] image:

The screenshot shows the OFBiz Party Manager Application interface. At the top left is the logo for 'OPEN FOR BUSINESS OFBiz.org'. At the top right, it says 'Welcome THE ADMINISTRATOR!' with the date '2006-05-04 08:38:09.671' and a language dropdown set to 'English (United States)'. Below this is a navigation bar with tabs for Accounting, Catalog, Content, Example, Facility, Manufacturing, Marketing, Order, Party (selected), Shark, WebTools, and Work Effort. The main content area is titled 'Party Manager Application' and has a sub-menu with 'Main', 'Find', 'Create', 'Communications', 'Visits', 'Classifications', 'Security', and 'Logout'. The 'Find Party' section is active, showing search criteria: 'Contact Information' (radio buttons for None, Postal, Telecom, Other), 'Party ID', 'User Login', 'Last Name' (with 'er' entered), 'First Name', 'Party Group Name', and 'Role Type' (dropdown menu set to 'Any Role Type'). There are 'Lookup Party' and 'Show all records' buttons. Below the search form is a table titled 'Parties Found' with columns for Party ID, User Login, Name, and Type. The table contains one entry: Party ID 10010, User Login (None), Name Shopper, Sherry, and Type Person. There are 'Details', 'Orders', and 'New Order' buttons for this entry. At the bottom of the page, there are logos for W3C CSS and W3C XHTML 1.0, and a copyright notice: 'Copyright (c) 2001-2006 The Open For Business Project - www.ofbiz.org Powered By OFBiz'.

The only party found with an "er" letter combination in the last name.

.3.2.4.1.4 First Name

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

.3.2.4.1.5 Party Group Name

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

.3.2.4.1.6 Role Type (drop-down box)

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

.3.2.4.2 Postal

Same fields as None and adds the following:

.3.2.4.2.1 Address 1

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

.3.2.4.2.2 Address 2

This would be the second line of the Address. This might be something like 'Apartment 234.'<p> Remember that in a search, the more information you enter, the more specific your search results will be. If you can get the answer with just a little bit of information, entering more might be counter-productive. If you enter an error, it might keep the search tool from finding that which you seek because it is looking for that false bit of information.

.3.2.4.2.3 City

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

.3.2.4.2.4 State/Province (drop-down box)

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

.3.2.4.2.5 Party Postal Code

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

.3.2.4.3 Telecom

Same fields as None and adds the following:

.3.2.4.3.1 findparty-tele



Party Manager Application

Find Party

[Hide Fields](#) | [Lookup Party](#)

Contact Information : None Postal Telecom Other

Party ID :

User Login :

Last Name :

First Name :

Party Group Name :

Role Type :

Country Code :

Area Code :

Contact Number :

[Lookup Party](#) [Show all records](#)

Parties Found

Party ID	User Login	Name	Area Code	Type
No parties found. Create New				



Party search screen for those parties with a Telecom (phone, fax, cell) number in their contact information.

.3.2.4.3.2 link buttons

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

.3.2.4.3.3 Country Code

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

.3.2.4.3.4 Area Code

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

.3.2.4.3.5 Contact Number

In this field enter all 7 digits (North America) without spaces or punctuation.
A phone number (together with the Area Code) is such a unique identifier that with this alone you should be able to find the party you seek.

.3.2.4.4 CommonOther

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

.3.2.4.4.1 findparty-oth

id:[11050] image:



Welcome THE ADMINISTRATOR!
2006-05-03 09:48:07.0

English (United States)

Accounting | Catalog | Content | Example | Facility | Manufacturing | Marketing | Order | **Party** | Shark | WebTools | Work Effort

Party Manager Application
Main | Find | Create | Communications | Visits | Classifications | Security | Logout

Find Party Hide Fields | Lookup Party

Contact Information : None Postal Telecom Other

Party ID :

User Login :

Last Name :

First Name :

Party Group Name :

Role Type :

PartyContactInfoList :

Parties Found

Party ID	User Login	Name	Type
No parties found. <input type="button" value="Create New"/>			



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Powered By OFBiz

Party search screen especially for those parties on a Contact List.

.3.2.4.4.2 link buttons

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

.3.2.4.4.3 PartyContactInfoList

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

.3.2.5 Show all records link

.3.2.5.1 Discussion

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

.3.2.5.2 showall



Party Manager Application
Main Find Create Communications Visits Classifications Security Logout

Find Party Show Lookup Fields

Parties Found				Previous	1 - 20 of 43	Next
Party ID	User Login	Name	Type			
NA	(None)		Person	Details	Orders	New Order
admin	(Many)	ADMINISTRATOR, THE	Person	Details	Orders	New Order
ltdadmin	(Many)	Administrator, Limited	Person	Details	Orders	New Order
externaluser	supplier	User, External	Person	Details	Orders	New Order
bizadmin	bizadmin	Administrator, Business	Person	Details	Orders	New Order
BLOG_USERS	(None)		Party Group	Details	Orders	New Order
BLOG_EDITORS	(None)		Party Group	Details	Orders	New Order
BLOG_ADMINS	(None)		Party Group	Details	Orders	New Order
BLOG_AUTHORS	(None)		Party Group	Details	Orders	New Order
BLOG_PUBLISHERS	(None)		Party Group	Details	Orders	New Order
BLOG_GUEST	blog_guest	Guest, Blog	Person	Details	Orders	New Order
BLOG_ADMIN	blog_admin	Admin, Blog	Person	Details	Orders	New Order
BLOG_AUTHOR	blog_author	Author, Blog	Person	Details	Orders	New Order
BLOG_EDITOR	blog_editor	Editor, Blog	Person	Details	Orders	New Order
approver	approver	Smith, Robert	Person	Details	Orders	New Order
MARKETING	(None)	Marketing department	Party Group	Details	Orders	New Order
ACCOUNTING	(None)	Accounting department	Party Group	Details	Orders	New Order
SALES	(None)	Sales department	Party Group	Details	Orders	New Order
DEV	(None)	Development department	Party Group	Details	Orders	New Order
TESTING	(None)	Testing department	Party Group	Details	Orders	New Order



When you click on [Show all records], this is the first of many screens returned; scroll with [Previous] and [Next].

.3.2.5.3 link buttons

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

.3.2.5.4 Discussion

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

.3.3 >> Party(s) Found

.3.3.1 Discussion

1. Click on either the Party # or [Details] to get to the Profile for the party. The links to [Orders] and [New Order] open a screen in the Order Manager with the selected Party ID in place. <p> 2. You can come here to the Party Manager, find your customer, and go directly to the Order Manager to create his new order. Or, you can go to a table of previously placed orders to work with an existing order.

.3.3.2 findparty-found



Party Manager Application

Find Party [Hide Fields](#) [Lookup Party](#)

None Postal Telecom Other
Contact Information :
Party ID :
User Login :
Last Name :
First Name :
Party Group Name :
Role Type :

Address 1 :
Address 2 :
City :
State/Province :
PartyPostalCode :

Parties Found [Previous](#) | [1 - 1 of 1](#) | [Next](#)

Party ID	User Login	Name	PartyPostalCode	Type	
10010	(None)	Shopper, Sherry	69361	Person	<input type="button" value="Details"/> <input type="button" value="Orders"/> <input type="button" value="New Order"/>



First Name search (under Postal) found this party matching the parameter "sh." Click the ID or [Details] to view the Profile.

.3.3.3 link buttons

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

.3.3.4 Party ID

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

.3.3.5 User Login

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

.3.3.6 Name

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

.3.3.7 PartyPostalCode

Because the search was conducted under the Postal radio button criteria, this particular field is presented. A different

field will appear for each of the other Contact Mechanism types.

.3.3.8 Type

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

.3.4 Profile sub-tab

.3.4.1 Discussion

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

.3.4.2 viewprofile



Party Manager Application

Main Find Create Communications Visits Classifications Security Logout

Profile Role(s) Relationships Communications Vendor Tax Infos Rates Shopping Lists Segments Classifications Contact List

Billing Accounts Orders New Order Payments Sent Payments Received

The Profile of Sherry Shopper [10010]

Personal Information

Name: Sherry Shopper
 Gender: F
 Birth Date: 1980-01-04
 Marital Status: M
 Comments: Good customer.

Loyalty Points

You have 0 points from 0 order(s) in the last 12 Months.

Contact Information

Contact Type	Contact Information	Soliciting OK?	
Postal Address	Billing (AP) Address General Correspondence Address Shipping Destination Address To: Sherry Shopper 1313 Avenue Z Scottsbluff, NE 69361 USA (lookup:whitepages.com) (Updated: 2006-05-04 08:55:10.718)	(N)	<input type="button" value="Update"/> <input type="button" value="Expire"/>
Phone Number	Main Home Phone Number Payment (AR) Phone Number Primary Phone Number 308-555-1176 (lookup:anywho.com) (lookup:whitepages.com) (Updated: 2006-05-04 11:19:49.625)	(Y)	<input type="button" value="Update"/> <input type="button" value="Expire"/>
Email Address	Order Notification Email Address Primary Email Address luv2shop@gmail.info (send email) (Updated: 2006-05-04 11:22:02.765)	(Y)	<input type="button" value="Update"/> <input type="button" value="Expire"/>

Payment Method Information

Credit Card: Sherry Shopper - Visa 4111111111111111 08/2007 (Updated: 2006-05-04 09:43:18.718)

Gift Card: 06-G00476 [SH06145] (Updated: 2006-05-04 12:24:31.343)

EFT Account: Steve or Sherry Shopper - Bank: First City Bank Account #: 100203405 (Updated: 2006-05-04 12:29:45.765)

Cybersource AVS Override

AVS String: Global

User Name(s)

User Login: sherry ENABLED

Party Attribute(s)

Name: Shopping Frequency Value: Very Often

Last Visit(s)

Visit Id	User Login	New User	WebApp	Client IP	From Date	Thru Date
10013	sherry	N	ecommerce		2006-05-04 14:23:34.546	2006-05-04 14:28:03.0

Notes

By: ADMINISTRATOR, THE At: 2006-05-04 09:46:41.078 Good customer; give her the benefit of any doubt.



A typical customer Profile. Note the many links to processes available from this screen. Details will vary with each Party.

.3.4.3 link buttons

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

.3.4.4 Update Personal Information

.3.4.4.1 Edit Personal Information

1.) You come to this screen by clicking the [Update] link in the Party Profile > Personal Information section. The nature of the information given here depends upon whether the Party is a Group, an Employee, a Vendor, or a Customer. <p> 2.) Click on [Update]. The original information is entered from the Create Party screen which is very similar. Here is where you will make changes or update any changed details. Other details, such as contact information, is entered at other screens which are accessed through the View Profile screen. <p> 3.) Note the word 'Personal' -- these details are very private and inappropriate release could cause damage to your customers, employees or other party groups. <p> 4.) When finished, first click [Save]. When the screen returns a message that 'Person successfully updated.', click on the [Cancel / Done] link to return to the Profile screen.

.3.4.4.2 editperson



Party Manager Application

The Profile of Sherry Shopper [10010]

Party ID 10010 -[cannot change without re-creating]-

Salutation

First Name

Middle Name

Last Name

Personal Title

Suffix

Nickname

First Name Local

Last Name Local

Member Id

Gender

Birth Date

Height

Weight

Mothers Maiden Name

Marital Status

Social Security Number

Passport Number

Passport Expire Date

Total Years Work Experience

Comments

Employment Status Enum Id

Occupation

Years With Employer

Months With Employer

Preferred Currency Uom Id

Description



Almost identical to the Create Party screen. You can change or add personal information as desired (except PartyID).

.3.4.4.3 link buttons

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

.3.4.4.4 Party ID

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

.3.4.4.5 Salutation

How the Party is to be greeted in correspondence.

.3.4.4.6 First Name

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

.3.4.4.7 Middle Name

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

.3.4.4.8 Last Name

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

.3.4.4.9 Personal Title

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

.3.4.4.10 Suffix

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

.3.4.4.11 Nickname

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

.3.4.4.12 First Name Local

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

.3.4.4.13 Last Name Local

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

.3.4.4.14 Member ID

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

.3.4.4.15 Gender (drop-down box)

Select the gender from the drop-down box.

.3.4.4.16 Birth Date (popup calendar)

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

.3.4.4.17 Height

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

.3.4.4.18 Weight

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

.3.4.4.19 Mothers Maiden Name

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

.3.4.4.20 Marital Status (drop-down box)

Select from the drop-down box.

.3.4.4.21 Social Security Number

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

.3.4.4.22 Passport Number

Number on the passport.

.3.4.4.23 Passport Expire Date (popup calendar)

Date the passport expires.

.3.4.4.24 Total Years Work Experience

Useful for employee data.

.3.4.4.25 Comments

Additional notes can be entered here.

.3.4.4.26 Employment Status Enum Id

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

.3.4.4.27 Occupation

Nature of the Party's work or employment.

.3.4.4.28 Years With Employer

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

.3.4.4.29 Months With Employer

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

.3.4.4.30 Preferred Currency Uom ID

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

.3.4.4.31 Description

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

.3.4.5 Loyalty Points

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

.3.4.6 Contact Information

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

.3.4.6.1 Contact Type

The following appear only if they exist.

.3.4.6.1.1 Postal Address

Associated with the address are assignments for which the address is to be used, such as Billing, General Correspondence, Shipping, etc. <P> You might use the link to (lookup:whitepages.com) for confirming the address. <P> Note the column 'Soliciting OK?' If this is marked Y, then it is acceptable to mail marketing materials to the address. <p> Click on [Update] to make changes. Click on [Expire] if the address is no longer active.

.3.4.6.1.1.1 Edit Contact Mech - Postal

id:[14976] image:



Welcome THE ADMINISTRATOR!
2006-05-04 10:34:33.312

English (United States)

Accounting Catalog Content Example Facility Manufacturing Marketing Order Party Shark WebTools Work Effort

Party Manager Application

Main Find Create Communications Visits Classifications Security Logout

Edit Contact Information

Contact Purposes	Billing (AP) Address (Since:2006-05-04 09:43:18.718)	<input type="button" value="Delete"/>
	Shipping Destination Address (Since:2006-05-04 10:34:33.14)	<input type="button" value="Delete"/>
	General Correspondence Address	<input type="button" value="Add Purpose"/>

To Name:

Attention Name:

Address Line 1: *

Address Line 2:

City: *

State/Province: *

Zip/Postal Code: *

Country: *

Allow Solicitation?

W3C CSS W3C XHTML 1.0

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This is the Update screen where you can specify the purpose(s) for this Postal address.

.3.4.6.1.1.2 link buttons

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

.3.4.6.1.1.3 Contact Purposes

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

.3.4.6.1.1.3.1 List of existing

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

Manager Reference: Party

Purpose needs to be removed.

.3.4.6.1.1.3.2 Add Purpose (drop-down box)

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

.3.4.6.1.1.4 To Name

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

.3.4.6.1.1.5 Attention Name

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

.3.4.6.1.1.6 Address Line 1 *

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

.3.4.6.1.1.7 Address Line 2

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

.3.4.6.1.1.8 City *

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

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

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

.3.4.6.1.1.10 Zip/Postal Code *

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

.3.4.6.1.1.11 Country (drop-down box) *

Most of the countries of the world are listed alphabetically in this drop-down list. Select the one you need. <P> The United States of America is actually listed three times, first at the beginning of the list as 'USA', then again at the top as 'United States;' you will also find it deeper in the list, alphabetically, as United States.

.3.4.6.1.1.12 Allow Solicitation? (Y/N)

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

.3.4.6.1.2 Phone number

Each of the telecom numbers given is listed in its own section. These could be the main home phone number, the fax number, the mobile phone, etc. The links to (lookup:anywho.com) and (lookup:whitepages.com) are there to check out the numbers. <P> Note the column 'Soliciting OK? If this is marked Y, then it is acceptable to call or fax solicitations. <p> Click on [Update] to make changes. Click on [Expire] if the phone number is no longer active. Click on [Create New] to add another number.

.3.4.6.1.2.1 EditContactMech-Tele



Party Manager Application

Edit Contact Information

[Go Back] [Save]

Contact Purposes	Main Home Phone Number (Since:2006-05-04 09:40:46.765)	Delete	
	Payment (AR) Phone Number (Since:2006-05-04 11:13:56.093)	Delete	
	Primary Phone Number	Add Purpose	

Phone Number - 308 - 555-1176 ext

[Country Code] [Area Code] [Contact Number] [ext]

Allow Solicitation?

[Go Back] [Save]



When you click [Update] at the Profile screen, you are brought here to change the number or its Purpose(s).

.3.4.6.1.2.2 link buttons

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

.3.4.6.1.3 Email Address

This is the email address used to send automatically generated notices when shipping an order, etc. Click on the link (send email) to generate a message from this screen. <P> Note the column 'Soliciting OK? If this is marked Y, then it is acceptable to send marketing email messages. <p> Click on [Update] to make changes and indicate Purposes. Click on [Expire] if the address is no longer active.

.3.4.6.1.3.1 EditContactMech-Email



Party Manager Application
Main Find Create Communications Visits Classifications Security Logout

Edit Contact Information

[Go Back] [Save]

Contact Purposes	Order Notification Email Address (Since:2006-05-04 11:21:32.171)	Delete	<input type="checkbox"/>
	Primary Email Address (Since:2006-05-04 11:21:40.687)	Delete	<input type="checkbox"/>
	Other Email Address <input type="text"/>	Add Purpose	
Email Address	<input type="text" value="luv2shop@gmail.info"/> *		
Allow Solicitation?	<input type="text" value="Y"/>		

[Go Back] [Save]



Add Purpose(s) or change the existing Email Address here.

.3.4.6.1.3.2 link buttons

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

.3.4.6.1.4 Other

Other contact details might be listed.

.3.4.6.2 Soliciting OK? Y/N

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

.3.4.7 Payment Method Information

.3.4.7.1 Payment Method Information

Details are presented only for the existing methods of payment. <p> Similar screens appear for either [Create New] or [Update]. The only significant difference is that with [Update] existing information is presented as populated rather than blank. <p> [Manual Tx] refers to those with a credit card who do not wish their credit card details to exist within your system but will use a credit card number or some other means to accomplish an order by giving the details at the time of ordering for a one-time manual transaction. <p> Gift Cards need to be established elsewhere within the system with a means to transfer credit funds into them and a numbering system by which to assign them before they can be successfully [Create]d here.

.3.4.7.2 Update Credit Card

.3.4.7.2.1 editcreditcard



Party Manager Application

AccountingEditCreditCard

Company Name on Card

Prefix on Card

First Name on Card *

Middle Name on Card

Last Name on Card *

Suffix on Card

Card Type *

Card Number *

Expiration Date *

Billing Address **Party Use Current Address:**
Billing (AP) Address
General Correspondence Address
Shipping Destination Address
 To: Sherry Shopper
 1313 Avenue Z
 Scottsbluff, NE 69361
 USA
 (Updated: 2006-05-04 08:55:10.718)



Credit card accounts are edited here. Use a radio button to select Billing from multiple addresses.

.3.4.7.2.2 link buttons

[Cancel / Done] [Save]

.3.4.7.2.3 Company Name on Card

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

.3.4.7.2.4 Prefix on Card (drop-down box)

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

.3.4.7.2.5 First Name on Card *

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

.3.4.7.2.6 Middle Name on Card

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

.3.4.7.2.7 Last Name on Card *

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

.3.4.7.2.8 Suffix on Card (drop-down box)

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

.3.4.7.2.9 Card Type (drop-down box) *

The choices are all the usual types: Visa, MasterCard, and whatever others your Administrator chooses to include. Just because the application comes with the following doesn't mean that your processing company accepts them all. Supplied choices include: **** **<P>** Visa **
** Master Card **
** American Express **
** Diners Club **
** Discover **
** EnRoute **
** JCB ****

.3.4.7.2.10 Card Number *

* Required field. Be extremely accurate with this number and the expiration date. Double check the numbers before you click on [Save]. **<P>** In the Update or review mode, the field will only show the last four digits. You can see the complete number when you return to the View Profile screen. If incorrect there, return here to change it.

.3.4.7.2.11 Expiration Date * (drop-down boxes)

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

.3.4.7.2.12 Billing Address (button choices)

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

.3.4.7.2.12.1 Address choices

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

.3.4.7.2.12.2 (Create new)

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

.3.4.7.3 Update / Create Gift Card

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

.3.4.7.3.1 editgiftcard



Party Manager Application

Edit Gift Card

Card Number

Pin Number

Expire Date



When creating a new card, the title reads 'Create Gift Card.' Otherwise edit and create use this same screen.

.3.4.7.3.2 link buttons

[Cancel / Done] [Save]

.3.4.7.3.3 Card Number

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

.3.4.7.3.4 Pin Number

Enter the Pin number needed to confirm the user is authorized to charge items against the Gift Card. Be sure the customer has this number; you might want to back up the phone conversation with an email or a letter to provide a written record. <P> NOTE: Both the Gift Card number and the related Pin Number are given on the Profile screen, making it easy to pass on this information to the customer should they lose either number.

.3.4.7.3.5 Expire Date (drop-down boxes)

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

.3.4.7.4 Update / Create EFT Account

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

.3.4.7.4.1 editeftaccount



Party Manager Application
Main Find Create Communications Visits Classifications Security Logout

Page Title Edit EFT Account

Name on Account *

Company Name on Account

Bank Name *

Routing Number *

Account Type *

Account Number *

Party Billing Address **Party Use Current Address:**
Billing (AP) Address
General Correspondence Address
Shipping Destination Address
 To: Sherry Shopper
 1313 Avenue Z
 Scottsbluff, NE 69361
 USA
 (Updated: 2006-05-04 08:55:10.718)



Use this screen to edit or create a new Electronic Funds Transfer (EFT) account payment method.

.3.4.7.4.2 link buttons

[Cancel / Done] [Save]

.3.4.7.4.3 Name on Account *

* Required field. For the account transaction to process correctly, the name given on the account must be given exactly and completely. If the account holder tells you his name is Tom but Thomas is maintained on the account, you must have Thomas in this field. Middle initials generally need to be included as well.

.3.4.7.4.4 Company Name on Account

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

.3.4.7.4.5 Bank Name *

* Required field. This required field is important because the Routing Number and the Bank Name are completely linked in the system. By giving the name, you are confirming the Routing Number; the reverse is also true. <P> When financial institutions are merged, there is a period of confusion with the name. It may take a while before the name associated with the routing number is changed. Stay with the original name until the bank requests or confirms that the new one should be used.

.3.4.7.4.6 Routing Number *

* Required field. The Routing Number identifies the financial institution. At the bottom of a check, it will be the first group of numbers from the left. It is separated from the Account Number by a strange symbol that kind of

looks like **|**: except the 'pipe' is short and thick, rather like the colon symbol.

.3.4.7.4.7 Account Type * (drop-down box)

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

.3.4.7.4.8 Account Number *

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

.3.4.7.4.9 Billing Address

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

.3.4.7.5 Manual TX link

.3.4.7.5.1 Manual ETx

id:[14988] image:

The screenshot displays the OFBiz Accounting Manager Application interface. At the top left is the logo "OPEN FOR BUSINESS OFBiz.org". At the top right, it says "Welcome Sherry Shopper! 2006-05-04 12:40:45.796" and includes a language dropdown set to "English (United States)" and a "Set" button. Below the header is a navigation bar with tabs: Accounting, Catalog, Content, Example, Facility, Manufacturing, Marketing, Order, Party, Shark, WebTools, and WorkEffort. The main content area is titled "Accounting Manager Application" and contains a sub-menu with "Main", "Agreements", "Billing Accounts", "Invoices", "Payments", "Transactions", "Chart of Accounts", "Fixed Assets", "Tax Authorities", "Companies", and "Logout". The "Manual Electronic Transaction" form is visible, with the following fields: "AccountingPaymentMethodType" set to "Credit Card", "Product Store" set to "OFBiz E-Commerce Store", and "Transaction Type" set to "Payment Authorization Service". At the bottom of the form area, there are logos for W3C CSS and W3C XHTML 1.0, both with checkmarks. Below the logos is the copyright notice: "Copyright (c) 2001-2006 The Open For Business Project - www.ofbiz.org Powered By OFBiz". A text box at the bottom of the screenshot contains the instruction: "When you click the Manual TX link in this section, it opens this window to begin the manual processing of a Credit Card."

.3.4.8 Cybersource AVS Override

.3.4.8.1 Edit AVS Override String

Many companies often turn away sales that were 'approved' by the card issuer but that contained 'partial match' or 'no match' Address Verification Service (AVS) results in the authorization response. Unfortunately, these AVS results are often unreliable, since AVS does not evaluate the entire address. For example, AVS performs address matching only on the numeric digits of the address (that is, the street number and postal code). As a result, AVS results can lead you to believe that perfectly legitimate transactions are suspicious in some way. <P> In contrast, CyberSource uses powerful address validation technology that has been approved by the U.S. Postal Service. Smart Authorization analyzes the complete address and assesses the likelihood that it is legitimate and deliverable. Because this technology is so much more powerful and accurate than that provided by the card associations, we recommend that you ignore the AVS results in the authorization response. If Smart Authorization detects a 'bad' address, it will return a risk factor code indicating this. <P> See more information at the CyberSource website: <http://www.cybersource.com/>

.3.4.8.1.1 editAvsOverride

id:[DOCPRT3701] image:

The screenshot shows the 'Party Manager Application' interface. At the top left is the 'OPEN FOR BUSINESS OFBiz.org' logo. At the top right, it says 'Welcome THE ADMINISTRATOR!' with the date '2005-09-07 08:48:23.328' and a language dropdown set to 'English (United States)' with a 'Set' button. A navigation bar contains tabs for Accounting, Catalog, Content, Example, Facility, Manufacturing, Marketing, Order, Party (selected), Shark, WebTools, and WorkEffort. Below this is a sub-navigation bar with 'Main', 'Find', 'Create', 'Comm', 'Visits', 'Classifications', 'Security', and 'Logout'. The main content area has a form with a label 'AVS String' and an empty text input field. Below the input are two buttons: '[Save]' and '[Cancel/Done]'. At the bottom of the page, there are W3C CSS and W3C XHTML 1.0 logos, and a copyright notice: 'Copyright (c) 2001-2005 The Open For Business Project - www.ofbiz.org Powered By OFBiz'. A text box at the bottom of the screenshot contains the text: 'AVS Override String is simple, but the input of a new String is mandatory to change from the Global default.'

.3.4.8.1.2 link buttons

[Save] [Cancel / Done]

.3.4.8.1.3 AVS String *

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

.3.4.9 User Names

.3.4.9.1 Create New UserLogin

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

.3.4.9.1.1 createnewlogin



Party Manager Application

The Profile of Sherry Shopper [10010]

Create UserLogin

User Login Id

Current Password

Current Password Verify

Password Hint



A new User gets their first Login created here. Password hints help remind forgetful users of their password choice.

.3.4.9.1.2 link buttons

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

.3.4.9.1.3 User Login ID

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

.3.4.9.1.4 Current Password

When creating a Password, try to use a combination of random characters, upper and lower case, with one or more numerals, for a total of 6 to 16 characters. For example, lmLes is both too short and too easily guessed. Better would be rT8gvx30wppqM which is both meaningless and random. Something between these two extremes should be fine.

.3.4.9.1.5 Current Password Verify

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

.3.4.9.1.6 Password Hint

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

.3.4.9.2 Edit >> Changes screen

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

.3.4.9.2.1 editlogin

id:[DOCPRT3718] image:



Welcome THE ADMINISTRATOR!
2006-05-04 12:57:48.453

English (United States)

Accounting Catalog Content Example Facility Manufacturing Marketing Order Party Shark WebTools Work Effort

Party Manager Application

Main Find Create Communications Visits Classifications Security Logout

Profile Role(s) Relationships Communications Vendor Tax Infos Rates Shopping Lists Segments Classifications Contact List

Billing Accounts Orders New Order Payments Sent Payments Received

The Profile of Sherry Shopper [10010]
Change UserLogin Password

Current Password

New Password

New Password Verify

Password Hint

Update UserLogin Security Settings

Enabled

Disabled Date Time

Successive Failed Logins



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Powered By OFBiz

Password is changed, User Login access is enabled or denied, and number of failed login logins are set at this screen.

.3.4.9.2.2 link buttons

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

.3.4.9.2.3 Change UserLogin Password

.3.4.9.2.3.1 Current Password

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

.3.4.9.2.3.2 New Password

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

.3.4.9.2.3.3 New Password Verify

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

.3.4.9.2.3.4 Password Hint

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

.3.4.9.2.4 Update UserLogin Security Settings

.3.4.9.2.4.1 Enabled? (Y/N)

You might temporarily disable an account you have just created. This account could be for a new employee who is not yet on board or for a customer whose credit has not been verified. With the account already created during all of the other entries, it can be instantly Enabled whenever desired as the circumstances change. <P> If there is a question about an account, say a bill is late being paid, the account can be temporarily disabled without removing the customer from the system.

.3.4.9.2.4.2 Disabled Date (popup calendar)

This would be the date a UserLogin is disabled, either manually by an administrator or automatically by the system for too many attempts with the wrong password which might indicate an attempted hacking.<P> If you are manually disabling the account, enter the date/time here with the popup calendar.

.3.4.9.2.4.3 Successive Failed Logins

Enter the number of unsuccessful login attempts permitted before the system automatically disables the UserLogin. <p>NOTE: The system can be programmed to automatically reinstate an account after a set amount of time has elapsed.

.3.4.9.3 Security Groups

.3.4.9.3.1 EditUserLoginSecurityGroups

id:[DOCPRT3735] image:

The screenshot shows the 'Party Manager Application' interface. At the top, there is a navigation bar with tabs for Accounting, Catalog, Content, Example, Facility, Manufacturing, Marketing, Order, Party, Shark, WebTools, and Work Effort. The 'Party' tab is selected. Below the navigation bar, there is a header area with the text 'Welcome THE ADMINISTRATOR!' and the date '2006-01-27 20:28:29.157'. There is also a language dropdown menu set to 'English (United States)' and a 'Set' button. The main content area is titled 'Party Manager Application' and has a sub-header 'The Profile of Loyal Employee [10023]'. Below this, there are several tabs for different sections: Profile, Role(s), Relationships, Communications, Vendor, Tax Infos, Rates, Shopping Lists, Segments, Classifications, and Contact List. The 'Profile' tab is selected. Underneath, there are more tabs for 'Billing Accounts', 'Orders', 'New Order', 'Payments Sent', and 'Payments Received'. The main content area is titled 'Edit UserLogin Security Groups' and contains a table with the following data:

Group	From Date	Thru Date - Update
Flexible_Admin_group, has all granular permissions. [FLEXADMIN]	2005-12-06 08:58:57.263	[Update] [Remove]

Below the table, there is a section titled 'Add UserLogin to Security Group' with a dropdown menu for the group (set to '[WEB_BLOG_TECH] All technical permissions to manage / maintain website content.'), a 'From Date' field (set to '2006-01-02 20:28:29.516'), and a 'Thru Date' field. There is an 'Add' button below these fields. At the bottom of the page, there are logos for W3C CSS and W3C XHTML 1.0, and a copyright notice: 'Copyright (c) 2001-2006 The Open For Business Project - www.ofbiz.org Powered By OFBiz'.

Rights to access functions and the authority to make changes are limited by the Security Groups to which a Party has membership.

.3.4.9.3.2 link buttons

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

.3.4.9.3.3 Edit UserLogin Security Groups

.3.4.9.3.3.1 Group

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

.3.4.9.3.3.2 From Date

This is generally now, the current date and time.

.3.4.9.3.3.3 Thru Date

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

.3.4.9.3.3.4 Remove?

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

.3.4.9.3.4 Add UserLogin to Security Group

.3.4.9.3.4.1 Group (drop-down box)

Permissions are the authority to make changes to or allow entry into the System at certain places. Here you select from the Group which has the Permissions needed for the Party. <P> For example, if the Party works in the Accounting section making entries in the Accounts Receivable department, she would not need to have Permissions to change everyone's password. Her group would include only those Permissions she needs to do her job. On the other hand, the Systems Administrator needs to be able to do whatever might be needed anywhere in the Application; he would have the highest level of permissions and authorizations.

.3.4.9.3.4.2 From Date (popup calendar)

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

.3.4.9.3.4.3 Thru Date (popup calendar)

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

.3.4.10 Party Attributes

.3.4.10.1 partyattributes



Party Manager Application

Main Find Create Communications Visits Classifications Security Logout

Profile Role(s) Relationships Communications Vendor Tax Infos Rates Shopping Lists Segments Classifications Contact List

Billing Accounts Orders New Order Payments Sent Payments Received

The Profile of Sherry Shopper [10010]

Party Attribute

Attr Name	<input type="text" value="Shopping Frequency"/>
Attr Value	<input type="text" value="Very Often"/>
<input type="button" value="Update"/>	



Create whatever Attribute you would like for the Party and give that Attribute a Value at this screen.

.3.4.10.2 link buttons

[Edit] [Create New]

.3.4.10.3 Discussion

From the viewprofile screen you have a Section labeled 'Party Attributes.' This is usually empty until you click on the [Create New] link. That link takes you to the screen shown above which appears to be part of the Vendor tab processes. The fields are blank when first presented from the [Create New] link. Give any attribute you wish to use a name and a value the press [Update]. <P> The newly-created Attribute will continue to display in this Vendor > Create Attribute screen as if you had not clicked on the [Update] link, so to see the new Attribute you need to click on the [Profile] tab. You will see the newly-created Attribute in the Party Attribute(s) section of the Profile. <p> When you click [Edit], you are returned to this same screen under Vendor but with the fields populated for the selected Attribute. Make what ever changes you need then click [Update]. Again, you will need to return to the viewprofile screen to see the changes reflected in the Profile.

.3.4.10.4 Name

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

.3.4.10.5 Value

Words that give measure or purpose to the named Attribute.

.3.4.11 Last Visit(s) section

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

.3.4.11.1 Visit ID

Click on the ID to view the Visit Detail and Hit Tracker screen. Here you see details about when the Party used the application for a predetermined number of visits on display. <p/>You can also [List All] visits made by this party or you can click on the Visit ID for more information about that visit.</p>

.3.4.11.2 User Login

The 'name' by which they logged in.

.3.4.11.3 New User

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

.3.4.11.4 WebApp

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

.3.4.11.5 Client IP

The address of the client Internet Provider.

.3.4.11.6 From Date (includes time)

When did they log in?

.3.4.11.7 Thru Date (includes time)

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

.3.4.12 Notes

.3.4.12.1 By

Shows who created the Note.

.3.4.12.2 At (date/time)

Shows when the note was created.

.3.4.12.3 Text

Content of the Note.

.3.4.12.4 Notes discussed

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

.3.4.13 Billing Accounts link

.3.4.13.1 BillingAccounts



Accounting Manager Application

Billing Accounts

[New Account](#)

Account ID	Account Limit	RoleType ID	
10000	\$1,500.00	Bill-To Customer	<input type="button" value="Edit"/>



Click [Edit] to see details and transaction records under the Accounting Manager.

.3.4.13.2 Billing Accounts link discussion

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

.3.4.14 Orders link

.3.4.14.1 Orders

id:[14126] image:



Order Manager Application

Find Orders [Show Lookup Fields](#)

Order(s) Found Previous | 1 - 1 of 1 | Next

<input type="checkbox"/> Order Type	Order Id	Name	Survey	Items Ordered	Items Backordered	Items Returned	Remaining SubTotal	Order Total	Status	Order Date	Party ID
<input type="checkbox"/> Sales	WS10000	Sherry Shopper	0	3	1	0	\$57.59	\$61.07	Approved	2006-05-04 14:27:20.937	10010 <input type="button" value="View"/>



The [Orders] link takes you to this screen under the Order Manager > Find Orders > Orders Found screen in the Order Manager.

.3.4.14.2 Orders link discussion

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

.3.4.15 New Order link

.3.4.15.1 New Order link discussed

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

.3.4.15.2 newOrder

id:[14128] image:

The screenshot displays the OFBiz Order Manager Application interface. At the top, there is a navigation bar with tabs for Accounting, Catalog, Content, Example, Facility, Manufacturing, Marketing, Order, Party, Shark, WebTools, and Work Effort. The 'Order Manager Application' section is active, showing a 'Sales Order' form with fields for Product Store (OFBiz E-Commerce Store), Sales Channel (No Channel), User Login Id, and Party ID (10010). Below this is a 'Purchase Order' form with fields for Internal Organization (MARKETING - Marketing department), Supplier (No Supplier), and User Login Id. The interface includes a 'Find Party' and 'Continue' button for each section. The footer contains copyright information for 2001-2006 and mentions 'Powered By OFBiz'.

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

.3.4.16 Payments Sent link

.3.4.16.1 Payments Sent link discussed

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

.3.4.17 Payments Received link

.3.4.17.1 paymentsReceived



[Accounting](#) [Catalog](#) [Content](#) [Example](#) [Facility](#) [Manufacturing](#) [Marketing](#) [Order](#) [Party](#) [Shark](#) [WebTools](#) [WorkEffort](#)

Accounting Manager Application

[Main](#) [Agreements](#) [Billing Accounts](#) [Invoices](#) [Payments](#) [Chart of Accounts](#) [Fixed Assets](#) [Tax Authorities](#) [Transactions](#) [Logout](#)

Find Payments [Show Lookup Fields](#) [New Payment](#)

Payment(s) Found							Previous	1 - 2 of 2	Next
Payment #	Type	Method	Status	From Party	To Party	Effective	Amount		
10020	Customer Payment	Credit Card	Received	10011	Company	2006-01-27 07:00:44.375	117.37 Edit		
10000	Customer Payment	Credit Card	Received	10011	Company	2005-12-01 08:11:29.157	248.22 Edit		



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

.3.4.17.2 Payments Received link discussed

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

.4 Other Profile sub-tabs

.4.1 Role(s)

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

.4.1.1 viewroles

id:[DOCPRT3772] image:

The screenshot shows the 'Party Manager Application' interface. At the top, there is a navigation menu with tabs for Accounting, Catalog, Content, Example, Facility, Manufacturing, Marketing, Order, Party, Shark, WebTools, and Work Effort. The 'Party' tab is selected. Below the navigation menu is a header with the OFBiz logo and the text 'OPEN FOR BUSINESS OFBiz.org'. To the right of the header, there is a welcome message: 'Welcome THE ADMINISTRATOR! 2006-05-04 16:19:57.421' and a language dropdown menu set to 'English (United States)' with a 'Set' button.

The main content area is titled 'Party Manager Application' and has a sub-menu with tabs: Main, Find, Create, Communications, Visits, Classifications, Security, and Logout. The 'Role(s)' tab is selected. Below the sub-menu, there are several tabs: Profile, Role(s), Relationships, Communications, Vendor, Tax Infos, Rates, Shopping Lists, Segments, Classifications, and Contact List. The 'Role(s)' tab is selected, and the page title is 'The Profile of Sherry Shopper [10010]'. Below the title, there are tabs for Billing Accounts, Orders, New Order, Payments Sent, and Payments Received.

The 'Member Roles' section contains a table with the following data:

Role	Role Name	Action
Role	Bill-To Customer [BILL_TO_CUSTOMER]	Remove
Role	End-User Customer [END_USER_CUSTOMER]	Remove
Role	Placing Customer [PLACING_CUSTOMER]	Remove
Role	Ship-To Customer [SHIP_TO_CUSTOMER]	Remove

Below the table, there is a form to add a new role: 'Add To Role: Administrator' with an 'Add' button.

The 'New Role Type' section contains a form with the following fields:

- RoleType ID: *
- Description: *

There is a 'Save' button next to the Description field.

At the bottom of the page, there are logos for W3C CSS and W3C XHTML 1.0, and a copyright notice: 'Copyright (c) 2001-2006 The Open For Business Project - www.ofbiz.org Powered By OFBiz'.

A footer box contains the text: 'All Roles currently assigned are shown here; remove or add as needed. Note also the tool for creating new Role Types.'

.4.1.2 link buttons

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

.4.1.3 Member Roles

.4.1.3.1 Role

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

.4.1.3.2 Add To Role (drop-down box)

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

.4.1.4 New Role Type

.4.1.4.1 Role Type ID *

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

.4.1.4.2 Description *

Assignment of privileges for the new role type is made through Party Groups, Relationships and Security functions. <p> After pressing the [Save] link, the newly-created Role Type will appear in the drop-down box for assignment to any Party.

.4.2 Relationships

While the screen may seem complicated, this is a powerful tool for monitoring, updating and creating parent/child relationships between the parties. <p>NOTES:
 1. Must have previously established a Party which is treated as the 'current party' at this screen.
 2. Each party being assigned a relationship must have previously had the authority to hold the assigned role in the relationship. Use the Role(s) tab to establish that authority before proceeding.

.4.2.1 viewrelationships



Party Manager Application

The Profile of Mr. Harold S. Numbers II [10170]

Relationships

Description	From Date	
Party 10170 in role Supervisor is a Manager of party 10021 in role Contractor And Party Relationship Security Limited Catalog Admin group, has limited catalog permissions.	2006-01-23 11:12:32.863	<input type="button" value="[Remove]"/>
Thru Date: <input type="text"/> <input type="button" value="📅"/> Comments: <input type="text" value="Carla is an external auditor."/>		<input type="button" value="Update"/>
Party admin in role Administrator is a Manager of party 10170 in role Employee And Party Relationship Security Full Admin group, has all general permissions.	2006-01-23 11:08:07.175	<input type="button" value="[Remove]"/>
Thru Date: <input type="text"/> <input type="button" value="📅"/> Comments: <input type="text" value="Harry reports only to Admin."/>		<input type="button" value="Update"/>

The party with ID in the role of is a of the current party
in the role of
And Party Relationship Security

from thru
Comments:

The current party in the role of is a of the party with ID
in the role of
And Party Relationship Security

from thru
Comments:

New Relationship Type

Party Relationship Type Id

Parent Type

Party Relationship Name

Description

Valid From RoleType

Valid To RoleType



.4.2.2 link buttons

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

.4.2.3 Party Relationships

.4.2.3.1 Editing tool

Existing relationships editing tool. <P> NOTE: Table of existing relationships and this tool only shown when relationships already exist.

.4.2.3.1.1 Description

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

.4.2.3.1.2 From Date (popup calendar)

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

.4.2.3.1.3 Thru Date (popup calendar)

The Relationship terminates at the indicated Date and Time. You can leave this optional field open. <P> This Date can be changed here without recreating the Relationship. Either use the popup calendar or enter in the format yyyy-MM-dd H:mm:ss.0. The system will not accept an entry without the time, so if the relationship ends at midnight, enter 23:59:59.9.

.4.2.3.1.4 Comments

Comments can be added or amended in this box.

.4.2.3.2 Creating child

.4.2.3.2.1 Creating child

Creating child-relationships tool.

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

If you do not have the correct Party ID, use the tool to locate it. Any role to be assigned with this relationship must already exist; use the Roles tab to pre-authorize the assignment of Roles. <P> For example, if you wanted to make Harold S. Numbers II (10170) the manager of the Accounting Department, these role assignments need to already exist:
 1. The Party ID 10170 must be assigned a role of Manager.
 2. The ACCOUNTING Group party must be recognized as a Department.
 To make these assignments, bring up each party (one at a time), select the Roles tab, and make the necessary assignments. Then you can come here to Relationships and establish the Harry Numbers as the Manager of the Accounting Department.

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

Roles in the drop-down box might be Competitor, Manager, Employee, Contact, Vendor, whatever Role might need to be used. <P>New Roles can be created in the tool under the Role sub-tab, discussed above. As soon as they are created there, they will appear in the drop-down menu here.

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

Select from one of the listed Relationship terms. These might be Manager, Employee, Supervisor, Sales Representative, etc. <P> Use the tool at the bottom of the screen to create new Relationship terms. As soon as the term is created, it will appear in the drop-down list.

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

Roles in the drop-down box might be Competitor, Manager, Employee, Contact, Vendor, whatever Role might need to be used. <P>New Roles can be created in the tool under the Role sub-tab, discussed above. As soon as

they are created there, they will appear in the drop-down menu here.

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

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

.4.2.3.2.7 'from' (popup calendar)

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

.4.2.3.2.8 'thru' (popup calendar)

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

.4.2.3.2.9 Comments

Optional.

.4.2.3.3 Creating parent-relationships tool

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

Roles in the drop-down box might be Competitor, Manager, Employee, Contact, Vendor, whatever Role might need to be used. <P>New Roles can be created in the tool under the Role sub-tab, discussed above. As soon as they are created there, they will appear in the drop-down menu here.

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

Select from one of the listed Relationship terms. These might be Manager, Employee, Supervisor, Sales Representative, etc. <P> Use the tool at the bottom of the screen to create new Relationship terms. As soon as the term is created, it will appear in the drop-down list.

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

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

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

Assigned roles must be within pre-set parameters of those roles. <P>Roles in the drop-down box might be Competitor, Manager, Employee, Contact, Vendor, whatever Role might need to be used. <P>New Roles can be created in the tool under the Role sub-tab, discussed above. As soon as they are created there, they will appear in the drop-down menu here.

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

Select level of security from the drop-down box.

.4.2.3.3.6 'from' (popup calendar)

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

.4.2.3.3.7 'thru' (popup calendar)

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

.4.2.3.3.8 Comments

Optional.

.4.2.4 New Relationship Type

.4.2.4.1 Party Relationship Type ID

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

.4.2.4.2 Parent Type (drop-down box)

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

.4.2.4.3 Party Relationship Name

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

.4.2.4.4 Description

Describe the name in a few short terms.

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

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

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

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

.4.3 Communications

.4.3.1 commEvents

id:[14137] image:



Welcome THE ADMINISTRATOR!
2006-05-04 17:24:48.937

English (United States)

Accounting Catalog Content Example Facility Manufacturing Marketing Order **Party** Shark WebTools Work Effort

Party Manager Application

Main Find Create **Communications** Visits Classifications Security Logout

Profile Role(s) Relationships **Communications** Vendor Tax Infos Rates Shopping Lists Segments Classifications Contact List

Comm Event Event Purpose(s) Role(s) Communication Work Efforts Content

Found Communication Events

New Communication

Communication Event Id	Party Id From	Party Id To	Communication Event Type Id	Status ID	Contact Mech Type Id	Role Type Id From	Role Type Id To	Start Date	Finish Date/Time	Cust Request Id	Subject	
<input type="text" value="10000"/>	THE ADMINISTRATOR [admin]	Sherry Shopper [10010]	Auto Email	Entered	Email Address	Administrator	Ship-To Customer				Thank you for your order.	<input type="button" value="Delete"/>

W3C CSS W3C XHTML 1.0

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Powered By OFBiz

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

.4.3.2 Communications

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

.4.4 Vendor Information

This is where new Vendors are entered into your system. Vendors are those parties who will be supplying you with

products, material, services, and support.

.4.4.1 viewvendor

id:[DOCPRT3764] image:



Welcome THE ADMINISTRATOR!
2006-05-04 18:09:10.359

English (United States)

Accounting Catalog Content Example Facility Manufacturing Marketing Order **Party** Shark WebTools Work Effort

Party Manager Application

Main Find Create Communications Visits Classifications Security Logout

Profile Role(s) Relationships Communications **Vendor** Tax Infos Rates Shopping Lists Segments Classifications Contact List

Billing Accounts Orders New Order Payments Sent Payments Received

The Profile of Demo Supplier [DemoSupplier]

Vendor Information

Manifest Company Name	<input type="text" value="Wholesale Widgets and Gizmos"/>
Manifest Company Title	<input type="text" value="Widgets & Gizmos for the Industry"/>
Manifest Logo Url	<input type="text" value="http://www.widgiz.biz"/>
Manifest Policies	All sales are final. Bill due upon delivery. Net 30, 2% in 10 Shipped FOB destination. Liability under separate insurance. Minimum quantity = 10 units. Minimum sale = \$100. All monies to be in US Dollars.

W3C CSS W3C XHTML 1.0

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

.4.4.2 link buttons

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

.4.4.3 Manifest Company Name

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

.4.4.4 Manifest Company Title

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

.4.4.5 Manifest Logo Url

Where the business can be found on the Internet. For example, <I>www.ups.com.</I><P> 'URL' actually means Uniform Resource Locator, but it is the term used to specify a web address.

.4.4.6 Manifest Policies

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

.4.5 Tax Infos

.4.5.1 EditPartyTaxInfos

id:[13022] image:

The screenshot shows the 'Party Manager Application' interface. At the top, there is a navigation bar with tabs for Accounting, Catalog, Content, Example, Facility, Manufacturing, Marketing, Order, Party, Shark, WebTools, and Work Effort. The 'Party' tab is selected. Below the navigation bar, there is a header for 'Party Manager Application' with sub-tabs: Main, Find, Create, Comm, Visits, Classifications, Security, and Logout. The main content area has a sub-header 'The Profile of Demo Supplier [DemoSupplier]' and a series of buttons: Profile, Role(s), Relationships, Communications, Vendor, Tax Infos, Rates, Shopping Lists, Segments, Classifications, and Contact List. The 'Tax Infos' button is highlighted. Below this, there are buttons for Billing Accounts, Orders, New Order, Payments Sent, and Payments Received. The main content area contains a table with the following data:

Tax Authority Geo	Tax Authority Party	From Date & Time	Thru Date - Party Tax Id - Is Exempt - Is Nexus
[UT] Utah	Utah_Sales_Tax Authority UT_TAXMAN	2003-11-01 19:07:28.242	<input type="text"/> 54-3219876 Y Y Update

Below the table, there is a form for creating a new tax authority entry. It includes a dropdown for 'Tax Authority Geo' (Country: [ABW] Aruba), a text field for 'Tax Authority Party', and date pickers for 'From Date' and 'Thru Date'. There are also dropdowns for 'Is Exempt' and 'Is Nexus', and a 'Create' button.

At the bottom of the page, there are logos for W3C CSS and W3C XHTML 1.0, and a copyright notice: Copyright (c) 2001-2005 The Open For Business Project - www.ofbiz.org Powered By OFBiz.

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

.4.5.2 link buttons

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

.4.5.3 Table of applied jurisdictions

.4.5.3.1 Tax Authority Geo

Discussed in same topic under Tool, below.

.4.5.3.2 Tax Authority Party

Discussed under the same topic under Tool, below.

.4.5.3.3 From Date / Time

Discussed in same topic under Tool, below.

.4.5.3.4 Thru Date / Time (popup calendar)

May be updated within the table.

.4.5.3.5 Party Tax ID

May be edited within the table.

.4.5.3.6 Is Exempt? (Y/N)

Discussed in same topic under Tool, below.

.4.5.3.7 Is Nexus?

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

.4.5.4 Tool to apply jurisdictions

.4.5.4.1 Tax Authority Geo (drop-down box)

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

.4.5.4.2 Tax Authority Party

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

.4.5.4.3 From Date (popup calendar)

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

.4.5.4.4 Thru Date (popup calendar)

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

.4.5.4.5 Party Tax ID

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

.4.5.4.6 Is Exempt?

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

.4.5.4.7 Is Nexus?

Set to indicate if the party is considered Nexus with the State taxing authority. The exact definition of nexus is determined at the state level. Different states have different rules on what will create nexus in their state.<P> For example:
 * Florida may require a consistent physical presence; if true, employees attending seminars or conferences don't establish nexus.
 * New York requires only a series of temporary visits to create nexus.

* California requires only short visits to the state (more than seven days in a 12-month period) to create nexus.<p> As you can see, sales and use tax problems for the small business owner can be quite complex. If you have customers in a state, you must determine if your business conducts any activities in the state that creates nexus. For some states, acts such as attending a sales convention as a vendor, or visiting a customer in the state on a sales call, will be enough to generate nexus. For many states, hiring employees who work from their homes creates nexus in the employees' home states.

.4.6 Rates

.4.6.1 Viewrates

id:[13638] image:



Welcome THE ADMINISTRATOR!
2005-11-29 19:53:54.054

English (United States)

Accounting Catalog Content Example Facility Manufacturing Marketing Order **Party** Shark WebTools Work Effort

Party Manager Application

Main Find Create Comm Visits Classifications Security

The Profile of Demo Supplier [DemoSupplier]

[Edit Party Rates](#)

Rate Type	From Date & Time	Thru Date - Rate	
Standard Hourly Rate	2004-11-01 19:52:45.523	2005-12-02 19:52:45.523 <input type="button" value="Calendar"/> 78.6	<input type="button" value="Update"/> <input type="button" value="Delete"/>

Rate Type

From Date

Thru Date

Rate



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

.4.6.2 link buttons

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

.4.6.3 Table of rates

.4.6.3.1 Rate Type

Discussed under Tool, below.

.4.6.3.2 From Date and Time

Discussed under Tool, below.

.4.6.3.3 Thru Date and Time

Discussed under Tool, below.

.4.6.3.4 Rate

Discussed under Tool, below.

.4.6.4 Tool to enter rates

.4.6.4.1 Rate Type (drop-down box)

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

.4.6.4.2 From Date (popup calendar)

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

.4.6.4.3 Thru Date

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

.4.6.4.4 Rate

Indicate the rate per hour in your default currency.

.4.7 Shopping Lists

.4.7.1 editShoppingList



Party Manager Application
Main Find Create Comm Visits Classifications Security Logout

Profile Role(s) Relationships Communications Vendor Tax Infos Rates Shopping Lists Segments Classifications Contact List

Billing Accounts Orders New Order Payments Sent Payments Received

The Profile of Mrs. Sherry Shopper [10011]

Shopping Lists Create New

Sherry's List

Shopping List Detail - Sherry's List New Order Create Request for Quote Create Quote Save

List Name:
 Description:
 List Type:
 Public?:
 Parent List:

List Items - Sherry's List

Product	Quantity	Quantity Purchased	Price	Total	
WG-1111 - Micro Chrome Widget : Micro Widget - Chrome Colored	<input type="text" value="1"/>	<input type="text"/>	\$59.99	\$59.99	<input type="button" value="Update"/> <input type="button" value="Remove"/>
GZ-5005 - Purple Gizmo : The stylish gizmo	<input type="text" value="1"/>	<input type="text"/>	\$47.99	\$47.99	<input type="button" value="Update"/> <input type="button" value="Remove"/>
GZ-9290 - His/Her Gizmo : A set of his/her gizmos	<input type="text" value="1"/>	<input type="text"/>	\$97.99	\$97.99	<input type="button" value="Update"/> <input type="button" value="Remove"/>

Quick Add To Shopping List



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

.4.7.2 link buttons

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

.4.7.3 Shopping List (drop-down box)

Until a list is selected, there may be nothing shown under the other headings, below. List Items section may read, 'Empty Shopping List.' So, the first thing to do is identify which List you want to see.<P> Choose the List from the drop-down box, then click on [Edit]. A Party may have many lists. They should be named to reflect purpose or content.

.4.7.4 Shopping List Detail --

.4.7.4.1 List Name

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

.4.7.4.2 Description

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

.4.7.4.3 List Type (drop-down box)

Selections might include: <P> ---
 Automatic Re-orders
 Frequent Purchases
 Gift Registry
 Special Purpose
 Wish List

.4.7.4.4 Public? (Y/N)

Maintain privacy of list contents with this toggle.

.4.7.4.5 Parent List (drop-down box)

There can be a tree of Shopping Lists. For example, Mom's Shopping Lists might be the Parent of separate lists for Husband, Daughter, Son, Mother, etc.

.4.7.5 List Items --

.4.7.5.1 Product

Click on the Product ID and you are taken to the Catalog Manager > Main tab > Product sub-tab where you can review details about the product.

.4.7.5.2 Quantity

This Quantity can be changed. If you are maintaining quick shopping lists of items you order from your vendors, for example, you might record the minimum purchase quantity here. That way you will always re-order the correct minimum from the Vendor.

.4.7.5.3 Quantity Purchased

How many of this item has been purchased over time by this party?

.4.7.5.4 Price

The List Price, automatically inserted by the system.

.4.7.5.5 Total

Quantity times the Price creates this number.

.4.7.6 Quick Add to Shopping List

Enter the Product ID and the quantity desired; click on [Add To Shopping List]. The item will quickly appear in the selected List, above.

.4.7.7 Create New Shopping List

.4.7.7.1 createEmptyShoppingList



Party Manager Application

Main | Find | Create | Comm | Visits | Classifications | Security | Logout

The Following Occurred:

- The action was performed successfully.

Profile | Role(s) | Relationships | Communications | Vendor | Tax Infos | Rates | **Shopping Lists** | Segments | Classifications | Contact List

Billing Accounts | Orders | New Order | Payments Sent | Payments Received

The Profile of Mrs. Sherry Shopper [10011]

Shopping Lists Create New

New Shopping List

Shopping List Detail - New Shopping List New Order | Create Request for Quote | Create Quote | Save

List Name	<input type="text" value="New Shopping List"/>
Description	<input type="text"/>
List Type	<input type="text" value="Wish List"/>
Public?	<input type="text" value="N"/>
Parent List	<input type="text" value="No Parent"/>
<input type="button" value="Save"/>	

List Items - New Shopping List

Empty Shopping List.

Quick Add To Shopping List

1



This is the screen presented for creating a new shopping list.

.4.7.7.2 Discussion

Complete the items under Shopping List Detail and press on the [Save] link to create a new List. You could subordinate (nest) the new List under a previously-created one by selecting its parent from the Parent List drop-down box.

.4.7.8 'Quote' links

With either the [Create Request for Quote] or the [Create Quote] links, you are taken to the Order Manager to begin the Request or Quotation creation process using the items in the List and/or the Party currently selected.

.4.8 Segments

.4.8.1 ViewSegmentRoles



Party Manager Application

Main Find Create Comm Visits Classifications Security Logout

Profile Role(s) Relationships Communications Vendor Tax Infos Rates Shopping Lists Segments Classifications Contact List

Billing Accounts Orders New Order Payments Sent Payments Received

New User [MARKETING]

PartySegmentRoles

Segment Group Id	Role	
Internet Presence 10000	Parent Organization	Delete
Trade Show Presence 10001	Parent Organization	Delete

Segment Group Id

Role Type Id Administrator



View assignments of Party to Party Segment Roles at this screen; create new assignments of Segment to Party to Role Type ID.

.4.8.2 link buttons

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

.4.8.3 Table of Segments for this Party

.4.8.3.1 Segment ID

Segments are classifications created under another Manager. You are identifying them here for the purpose of assigning Roles to Parties related to existing Segments. <P> The Segment ID was assigned by the system when the Segment was created.

.4.8.3.2 Party ID

The Party assigned to or associated with an existing Segment.

.4.8.3.3 Segment Type ID

Descriptive Type assigned or created with the Segment. Given here to confirm that you are assigning the Role to the correct Party-Segment association.

.4.8.4 Tool to assign Segment and Role

.4.8.4.1 Segment ID (popup search tool)

Segment ID must already exist before this assignment is attempted. It will only be brought forth here if it is already related with the Party ID you have previously selected before clicking on the Segments tab. <P> Segments are

actually created under the Marketing Manager > Segment tab. In the process, remember that Roles must already be assigned for a Party under the Party > Role(s) tab.

.4.8.4.2 Party ID

This was already selected with the Find Party function before you came to the Segments tab.

.4.8.4.3 Role Type ID (drop-down box)

The selection of the Role to be played by your selected Party in relation to the Segment ID is the primary purpose of this Tab. Using the drop-down box, select the Role Type ID and then click on the [Save] button.

.4.9 Classifications

.4.9.1 EditPartyClassifications

id:[13049] image:

The screenshot shows the 'Party Manager Application' interface. At the top, there is a logo for 'OPEN FOR BUSINESS OFBiz.org' and a user welcome message: 'Welcome THE ADMINISTRATOR! 2006-01-31 16:21:40.016'. A language dropdown is set to 'English (United States)'. The navigation menu includes 'Accounting', 'Catalog', 'Content', 'Example', 'Facility', 'Manufacturing', 'Marketing', 'Order', 'Party', 'Shark', 'WebTools', and 'Work Effort'. The 'Party' tab is active, and the 'Classifications' sub-tab is selected. The main content area shows the profile of 'Ms. Carla Consultant [10021]' with various management buttons like 'Profile', 'Role(s)', 'Relationships', etc. Below this is a table titled 'Classifications' with the following data:

PartyId	Description [Classification Group Id]	From Date	Thru Date - Save	
10021	Internet Marketing [10000]	2005-12-05 09:38:14.953	2007-01-01 16:21:40.391	<input type="text"/> Save Delete
10021	Those persons who are both Employees and Customers [10010]	2005-12-05 11:23:50.671		<input type="text"/> Save Delete

Below the table is a form to edit a classification. The 'Party ID' is set to '10021'. The 'Classification Group Id' is set to 'Internet Marketing'. There are input fields for 'From Date' and 'Thru Date', each with a calendar icon. A 'Save' button is at the bottom of the form.

At the bottom of the page, there are logos for 'W3C CSS' and 'W3C XHTML 1.0', and a copyright notice: 'Copyright (c) 2001-2006 The Open For Business Project - www.ofbiz.org Powered By OFBiz'.

Once a Party has been assigned a Classification, that classification (and any others assigned) appear(s) here in this table.

.4.9.2 link buttons

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

.4.9.3 Table of assigned Classifications

.4.9.3.1 Party ID

This would be the Party you have already selected to be working with.

.4.9.3.2 Description

Actually the terms of the Classification Group. Classifications are created elsewhere.

.4.9.3.3 From Date

When the Classification was assigned.

.4.9.3.4 Thru Date (popup calendar)

This is the only element of the previous assignment you can change. Use the [Save] link next to the calendar link to update the new entry.

.4.9.4 Tool to assign Classifications

.4.9.4.1 Party ID

This was already established when you selected the current Party through the Find Party function.

.4.9.4.2 Classification Group ID (drop-down box)

Select a Classification Group from the drop-down box. These are created under the Classifications tab.

.4.9.4.3 From Date (popup calendar)

That would generally be now, as you are assigning the Classification Group. You could pre-date or post-date if there were a reason for such.

.4.9.4.4 Thru Date (popup calendar)

The Classification Group assignment will expire at the time selected.

.4.10 Contact List

.4.10.1 ListPartyContactLists



Party Manager Application

Main Find Create Comm Visits Classifications Security Logout

Profile Role(s) Relationships Communications Vendor Tax Infos Rates Shopping Lists Segments Classifications **Contact List**

Contact List

Contact List	From Date	Status History - Thru Date - Status Id - Opt-in Code - Preferred Contact Mech Id
New Product Announcements 9000	2005-12-01 11:43:18.016	-- Status History -- <input type="text"/> Pending Acceptance <input type="button" value="Save"/> [10004] [sherry@yahoo.com] [--] [, , , ,]
Product Tips Newsletter 9010	2005-12-01 11:44:16.75	-- Status History -- <input type="text"/> Pending Acceptance <input type="button" value="Save"/> [10004] [sherry@yahoo.com] [--] [, , , ,]

Add Party to Contact List

Contact List Id

From Date

Thru Date

Status Id Pending Acceptance

Preferred Contact Mech Id



Existing Contact List ID is associated with the current Party or updated from this screen. Create new Contact Lists elsewhere.

.4.10.2 link buttons

[Save] [Profile] [Role(s)] [Relationships] [Communications] [Vendor] [Tax Infos] [Rates] [Shopping Lists] [Segments] [Classifications] [Contact List]

.4.10.3 Table of associated Contact Lists

.4.10.3.1 Contact List

Click the list ID number to view or edit the actual Contact List.

.4.10.3.2 From Date

Either the date the list was created or the association was established.

.4.10.3.3 Status History

Where the status has progressed from Pending Acceptance through Approved, etc.

.4.10.3.4 Thru Date (popup calendar)

Can be changed. This will be the date the list or its association with the Party will expire.

.4.10.3.5 Status ID (drop-down box)

Edit here when Status is changed. Use popup calendar to enter date if different than Now. <P>Possible Status could include one of the following:
 Pending Acceptance
 Accepted
 Rejected

.4.10.3.6 Opt-in Code

Does the Party agree to receive contact from you through this list? If so, the appropriate Opt-In code needs to be entered before the Party can be accepted to the List.

.4.10.3.7 Preferred Contact Mech ID (drop-down box)

You may change the Contact Mechanism even after acceptance.

.4.10.4 Tool to associate Contact Lists

.4.10.4.1 Contact List ID (popup search tool)

The search tool presents a list of all the existing Contact Lists; select one from among them.

.4.10.4.2 From Date (popup calendar)

Either today's date or the date of effectivity.

.4.10.4.3 Thru Date (popup calendar)

When do you wish the association with the Contact List to expire? May be left blank.

.4.10.4.4 Status ID (drop-down box)

Possible Status could include one of the following:<P> Pending Acceptance
 Accepted
 Rejected

.4.10.4.5 Preferred Contact Mech ID (drop-down box)

Each of the existing Contact Mechanisms for the selected Party will appear in the drop-down list; select the preferred method.

.5 Create

.5.1 createnew

id:[DOCPRT3877] image:



The screenshot shows the 'Party Manager Application' interface. At the top left is the 'OPEN FOR BUSINESS OFBiz.org' logo. At the top right, it says 'Welcome THE ADMINISTRATOR!' with the date '2006-05-03 10:43:13.593' and a language dropdown set to 'English (United States)'. A navigation bar contains tabs for Accounting, Catalog, Content, Example, Facility, Manufacturing, Marketing, Order, Party (selected), Shark, WebTools, and Work Effort. Below this is a sub-navigation bar with 'Main', 'Find', 'Create' (selected), 'Communications', 'Visits', 'Classifications', 'Security', and 'Logout'. The main content area is titled 'Create New Party Detail' and contains five links: '[*] Create New Party Group', '[*] Create New Person', '[*] Create Customer', '[*] Create Prospect', and '[*] Create Employee'. At the bottom of the page, there are logos for W3C CSS and W3C XHTML 1.0, and a copyright notice: 'Copyright (c) 2001-2006 The Open For Business Project - www.ofbiz.org Powered By OFBiz'. A footer box contains the text: 'From the Create tab you can choose which of 5 different types of Party to create. Click on the appropriate link here to begin.'

.5.2 link buttons

[Create New Party Group] [Create New Person] [Create Customer] [Create Prospect] [Create Employee]

.5.3 Create New Party Group

.5.3.1 Discussion

Once created, the Party Group will have a Profile which can be edited and updated from the Party Profile tab. You are taken to that tab when [Save] is selected.

.5.3.2 editpartygroup



Party Manager Application

Group Name	<input type="text" value="Catch the Calls - a Call Center"/>
Group Name Local	<input type="text" value="Call Center"/>
Office Site Name	<input type="text" value="Denver Call Center"/>
Comments	<input type="text" value="Group of telemarketers and e-commerce sys admins plus support"/>
Logo Image Url	<input type="text" value="http://www.openforcommerce.biz"/>
Description	<input type="text" value="Demo purpose business group"/>
	<input type="button" value="Save"/>
	<input type="button" value="Cancel/Done"/>



For identification, organization or communication purposes, Groups are always needed. URL is optional.

.5.3.3 link buttons

[Cancel / Done] [Save]

.5.3.4 Group Name

Should be a very descriptive Name so that its purpose or function is clearly understood.

.5.3.5 Group Name Local

What the Group is called casually within the company.

.5.3.6 Office Site Name

If associated with an office building or floor or area, what that is called. For example, a Group called the Finance Department might be found in the 'Accounting' wing of the 'Main Office Building' so this field could be Main Office Bldg. - Accounting Wing.

.5.3.7 Comments

Elaborate on the Group Name, explain why the Group exists, etc.

.5.3.8 Logo Image URL

If there is a link to a graphic or a website for this Group, state it here.

.5.3.9 Description

Here is where you can paint a word picture of what the Group is all about: how it differs from other Groups, its relationship with others, the primary functions it performs, etc.

.5.3.10 Group Profile

.5.3.10.1 viewprofile-group

id:[12095] image:

Group Profile screen is different, but it has the same links as a Party Profile; use the sub-tabs and links to build the Group.

.5.3.10.2 link buttons

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

.5.3.10.3 Discussion of the Group Profile

The details of the Party Group are presented and edited under Profile and the other sub-tabs shown on the screen. Those sub-tabs (with links to update or create more data) are discussed in depth under Find, above. <P> Some sections do not apply; this will always be the case working with generic screens such as these. Use what is appropriate and ignore the other. <p> Remember that the function of a Group is either (a) to identify or organize a collection of parties; or (b) to create a functionality such as a Department or a major Project which cuts across many Party Groups. <p> Groups can be nested. Groups can have multiple assignments. Parties or Groups can belong to more than one Group. Use the Roles and the Relationships tabs to create these associations.

.5.4 Create New Person

.5.4.1 Create New Person

Of course, you are not REALLY creating a new person but, as far as the database is concerned, the person does not exist until created at this screen. <p>NOTE: Do not try to fill every field; they are only presented to give you a place to record the data if it is available and also required by your company.

.5.4.2 editperson-new

id:[DOCPRT3895] image:



Welcome!
2006-05-03 11:13:14.578

English (United States)

Accounting | Catalog | Content | Example | Facility | Manufacturing | Marketing | Order | Party | Shark | WebTools | Work Effort

Party Manager Application

Main | Find | Create | Communications | Visits | Classifications | Security | Logout

Salutation	<input type="text"/>
First Name	<input type="text" value="Fred"/>
Middle Name	<input type="text"/>
Last Name	<input type="text" value="Flatrock"/>
Personal Title	<input type="text"/>
Suffix	<input type="text"/>
Nickname	<input type="text" value="Fred"/>
First Name Local	<input type="text" value="Fred"/>
Last Name Local	<input type="text" value="Flatrock"/>
Member Id	<input type="text"/>
Gender	<input type="text" value="Male"/>
Birth Date	<input type="text"/> <input type="button" value="Calendar"/>
Height	<input type="text"/>
Weight	<input type="text"/>
Mothers Maiden Name	<input type="text"/>
Marital Status	<input type="text" value="Single"/>
Social Security Number	<input type="text" value="000-00-0000"/>
Passport Number	<input type="text"/>
Passport Expire Date	<input type="text"/> <input type="button" value="Calendar"/>
Total Years Work Experience	<input type="text" value="15"/>
Comments	<input type="text"/>
Employment Status Enum Id	<input type="text"/>
Occupation	<input type="text" value="Consultant"/>
Years With Employer	<input type="text" value="2"/>
Months With Employer	<input type="text" value="27"/>
Preferred Currency Uom Id	<input type="text"/>
Description	<input type="text"/>
	<input type="button" value="Save"/>
	<input type="button" value="Cancel/ Done"/>



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Powered By OFBiz

Create (add) a new Party or individual from this screen.

.5.4.3 link buttons

[Save] [Cancel / Done]

.5.4.4 Salutation

How the person is to be greeted.

.5.4.5 First Name

The given name, rather than the family name.

.5.4.6 Middle Name

If they have a second or middle name, enter that or the initial letter here.

.5.4.7 Last Name

First and Last Name are the only required fields. Upon clicking [Save], you are taken to the Profile screen from where changes can be made.

.5.4.8 Personal Title

This could be Mr., Mrs., Dr., Ms., etc.

.5.4.9 Suffix

This would be Junior, Sr., Esquire, MD, Ph. D., etc.

.5.4.10 Nickname

Is there another name they prefer to be called? For example, Richard might be known as Dick to many people.

.5.4.11 First Name Local

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

.5.4.12 Last Name Local

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

.5.4.13 Member ID

If you have some kind of a membership group or other affiliation linkage, their membership identification in that organization can be entered here. This IS NOT the Party ID which will be generated by the system when you click [Save].

.5.4.14 Gender (drop-down box)

Use the drop-down box to identify their gender.

.5.4.15 Birth Date (popup calendar)

Either enter as yyyy-MM-dd or let the popup calendar insert it for you.

.5.4.16 Height

Height and weight can be recorded in US or metric terms.

.5.4.17 Weight

Height and weight can be recorded in US or metric terms.

.5.4.18 Mothers Maiden Name

Considered a reliable way to confirm someone claiming to be the party, for example. Usually only the party themselves would know their mother's maiden name. If a person representing themselves to be the Party fails to produce this item, they would be suspect.

.5.4.19 Marital Status (drop-down box)

Choices might include: <P> Single
 Married
 Separated
 Divorced
 Widowed

.5.4.20 Social Security Number

In countries outside the USA, this might be the national identification number.

.5.4.21 Passport Number

The country of issue could be entered along with the Passport Number.

.5.4.22 Passport Expire Date (popup calendar)

Especially if you have people working for you needing a valid passport for their travel, this date is important. You can confirm before they leave on a business trip, for example, that their passport will remain valid during their travels.

.5.4.23 Total Years Work Experience

More likely to be entered when a person will be an employee or a contractor. Might be useful if extending credit to someone.

.5.4.24 Comments

You can place any information here that does not fit under another topic regarding this Party.

.5.4.25 Preferred Currency Uom ID

Especially outside the US, individuals will have a preference for which national currency they use; enter that here.

.5.4.26 Description

If useful for your purposes, a Description of the person can be entered here.

.5.5 Create Customer

.5.5.1 Discussion

One obvious difference between creating a Customer and creating a Person or Employee is that this screen immediately asks for the Contact information - addresses, phone numbers, etc. <p> Username and Password are initially populated with data valid for the party creating the new customer information. Replace that with the customer's username and password or you will receive an error message that the username is already assigned.

.5.5.2 newcustomer

Party Manager Application

Create Customer

Title Mr.

First Name Charles -[*]-

Middle Initial E

Last Name Customer -[*]-

Suffix

Mailing/Shipping Address

Address Line 1 53 West Center Street -[*]-

Address Line 2 Unit 1546

City Orem -[*]-

State: [UT] Utah -[*]-

Zip/Postal Code 84058 -[*]-

Country USA: United States -[*]-

Allow Address Solicitation?

Home Phone Number

Country Code

Area Code 801

Phone Number 555-8764

Extension

Allow Solicitation?

Work Phone Number

Country Code

Area Code 801

Phone Number 555-9832

Extension

Allow Solicitation?

Fax Number

Country Code

Area Code 801

Phone Number 555-2356

Extension

Allow Solicitation?

Mobile Phone Number

Country Code

Area Code 801

Phone Number 555-7777

Allow Solicitation?

Email Address

Email CECustomer@mybox.info -[*]-

Allow Solicitation?

Username charley -[*]-

Password ***** -[*]-

Password ***** -[* Confirm]-

Fields marked with (*) are required.



Customers are added to the database through this screen. Also create their user login for the ecommerce site in the process.

.5.5.3 link buttons

[Save]

.5.5.4 Title

Mr., Ms., etc.

.5.5.5 First name *

This is the given name, not the Patronymic.
* The field is Required.

.5.5.6 Middle Initial

If there is a second or middle name, enter the initial letter here.

.5.5.7 Last Name *

This is the Family name, the last name in the English tradition.
* The field is Required.

.5.5.8 Suffix

Here will be entered terms such as Jr., Esq., M.D., Ph. D., etc.

.5.5.9 Mailing / Shipping Address

.5.5.9.1 Address Line 1 *

The mailing or delivery address. If there is only one line of address, enter it here.
* This field is required.

.5.5.9.2 Address Line 2

When the address requires two lines, enter the second one here. Do not use this line if there is only one needed.

.5.5.9.3 City *

The name of the town, city or community is in a * required field.

.5.5.9.4 State (drop-down box) *

Use the drop-down box to locate and select the region, state or province in this * required field.

.5.5.9.5 ZIP/Postal Code

(*) Required field.

.5.5.9.6 Country (drop-down box) *

Select the country from the drop-down box for this * required field.

.5.5.9.7 Allow Address Solicitation? (Y/N)

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

.5.5.10 Phone Numbers

NOTE: Each of the phone and fax number lines have a drop-down box to mark the customer's desires regarding solicitation. Read the comment above under Address Solicitation; the same policy applies to the phone and fax numbers but, while the customer might accept mailed advertisements, they might not welcome phone calls or faxes. Confirm for each item or assume the answer is NO.

.5.5.10.1 Home Phone Number

The telephone at the place of residence. The following information is to be entered:<P> Country Code and

this is NOT the Area Code!!
 Area Code
 Phone Number all 7 numbers in the US -- 555-1234
 Extension
 Allow Solicitation? Y/N (drop-down box) Confirm this item!

.5.5.10.2 Work Phone Number

The telephone at the place of employment. The following information is to be entered:<P> Country Code and this is NOT the Area Code!!
 Area Code
 Phone Number all 7 numbers in the US -- 555-1234
 Extension
 Allow Solicitation? Y/N (drop-down box) Confirm this item!

.5.5.10.3 Fax Number

The facsimile (fax) telephone number where the party can receive a fax. The following information is to be entered:<P> Country Code and this is NOT the Area Code!!
 Area Code
 Phone Number all 7 numbers in the US -- 555-1234
 Extension
 Allow Solicitation? Y/N (drop-down box) Confirm this item!

.5.5.10.4 Mobile Phone Number

The cell phone or mobile phone carried by the customer. The following information is to be entered:<P> Country Code and this is NOT the Area Code!!
 Area Code
 Phone Number all 7 numbers in the US -- 555-1234
 Allow Solicitation? Y/N (drop-down box) Confirm this item!

.5.5.11 Email address *

(*) Required field. <P> NOTE: The e-mail address line also has a drop-down box to mark the customer's desires regarding solicitation. Read the comment above under Address Solicitation; the same policy applies to the e-mail address. Confirm acceptance or assume the answer is NO. <p/>If there is a company policy to contact customers with e-mail updates regarding products, prices or policies, let the customer know to expect such mailings.</p>

.5.5.12 Username *

(*) Required field. Confirmed by email to the customer when a new account is approved. <P> NOTE: When this screen is brought up, the username of the party making the entry will appear here. Replace that with the new username or you will receive an error message.

.5.5.13 Password *

(*) Required field. Create a suitable password. <P> NOTE: When this screen is brought up, the password of the party making the entry will appear here as a series of asterisks (*****). Replace that with the new username or you will receive an error message.

.5.5.14 Password * (confirming)

Re-enter the password to confirm before the system locks it in. <P> NOTE: When this screen is brought up, the password of the party making the entry might appear here as a series of asterisks (*****). Replace that with the new username or you will receive an error message.

.5.6 Create Prospect

Except for the label in the upper LH corner, the form for Create Prospect is the same as the one for Create Customer and Create Employee. See the explanations of the fields above under Create Customer. <P> Differentiation between Customers, Prospects, and Employees is accomplished with the screens for Role(s), Relationships, and Contact Lists. There you can refine the Party data to accommodate the differences in needs.

.5.7 Create Employee

Except for the label in the upper LH corner, the form for Create Employee is the same as the one for Create Customer and Create Prospect. See the explanations of the fields above under Create Customer. <P> Differentiation between Customers, Prospects, and Employees is accomplished with the screens for Role(s), Relationships, and Contact Lists. There you can refine the Party data to accommodate the differences in needs. <P> You might prefer to use the form for Create Person as that has some fields not found here which might be useful with an employee.

.5.8 Create Contact Mechanisms

.5.8.1 EditContactMech-new

id:[14969] image:

The screenshot shows the OFBiz web application interface. At the top left is the logo for 'OPEN FOR BUSINESS OFBiz.org'. At the top right, it says 'Welcome THE ADMINISTRATOR!' with the date '2006-05-03 12:44:06.39' and a language dropdown set to 'English (United States)' with a 'Set' button. A navigation bar contains tabs for Accounting, Catalog, Content, Example, Facility, Manufacturing, Marketing, Order, Party (selected), Shark, WebTools, and Work Effort. Below this is a blue header for 'Party Manager Application' with sub-tabs: Main, Find, Create, Communications, Visits, Classifications, Security, and Logout. The main content area is titled 'Create New Contact Information' and contains a form with 'Select Contact Type:' and a dropdown menu showing 'Electronic Address', a '[Create]' button, and a '[Go Back]' button. Below the form are logos for W3C CSS and W3C XHTML 1.0. At the bottom, it says 'Copyright (c) 2001-2006 The Open For Business Project - www.ofbiz.org Powered By OFBiz'. A text box at the very bottom states: 'New contact mechanisms are begun at this screen after a Party is selected. Choose type from the drop-down box.'

.5.8.2 link buttons

[Create] [Go Back]

.5.8.3 Discussion

When a Party has been selected, this screen appears after clicking on a [Create] link. Select the type of contact mechanism you wish to create or add from the drop-down box, complete as much information as you have at that screen, then click [Save]. After each new Contact Mechanism has been created, you have an option presented for you to [Go Back] where you can choose another type. See the discussion of these screens under the Find topic, Profile > Contact Information > Edit Contact Mechanism section, above. <P> Choices available for a new Contact Mechanism include the following:
 Electronic Address
 Postal Address
 Phone Number
 Email Address
 Internet IP Address
 Internet Domain Name
 Web URL/Address

.6 Comm

.6.1 FindCommunicationEvents

id:[13656] image:

The screenshot displays the 'Party Manager Application' interface. At the top, there is a navigation bar with tabs for Accounting, Catalog, Content, Example, Facility, Manufacturing, Marketing, Order, Party, Shark, WebTools, and Work Effort. The 'Party' tab is selected. Below the navigation bar, there is a header for 'Party Manager Application' with sub-tabs: Main, Find, Create, Comm, Visits, Classifications, Security, and Logout. The main content area is titled 'Find Communication Events' and includes a 'New Communication' link. The search tool contains several input fields and radio button options:

- Communication Event Id:** Text input field with radio buttons for Equals, Begins With, Contains, Is Empty, and Ignore Case.
- Party Id From:** Text input field with a calendar icon.
- Party Id To:** Text input field with a calendar icon.
- Status Id:** Dropdown menu.
- Contact Mech Type Id:** Dropdown menu.
- Role Type Id From:** Dropdown menu.
- Cust Request Id:** Text input field with a calendar icon.
- Start Date:** Two text input fields with calendar icons and radio buttons for Equals, Same Day, Greater Than From Day Start, Greater Than, Less Than, Up To Day, Up Thru Day, and Is Empty.
- Finish Date/Time:** Two text input fields with calendar icons and radio buttons for Equals, Same Day, Greater Than From Day Start, Greater Than, Less Than, Up To Day, Up Thru Day, and Is Empty.
- Subject:** Text input field with radio buttons for Equals, Begins With, Contains, Is Empty, and Ignore Case.

At the bottom of the search tool is a 'Find' button. Below the search tool, there are logos for W3C CSS and W3C XHTML 1.0. The footer contains the text: 'Copyright (c) 2001-2006 The Open For Business Project - www.ofbiz.org Powered By OFBiz'.

First screen under the Comm tab. Enter search parameters then click on [Find].

.6.2 link buttons

[New Communication] [Find]

.6.3 Search tool parameters

.6.3.1 Discussion

Assumptions for the use of this tool are these:
 1.) You know that a communication event was documented in the system.
 2.) You have at least one of the pieces of information requested in the search tool. <p> Enter as few parameters as possible to bring up the Event. Ideally you will have the Communication Event ID number, which is what the search is trying to recover. If not, you would know who the communication was to or who it was from; enter one of those IDs and a table with all communications to or from that party will be presented. If those items are unknown, try to use one of the other parametric search items, paying attention to the Radio Buttons. <p> If you click on [Find] without entering any parameters, ALL existing Comm events will be presented. The screen shown below (ListLookUpCommEvents) shows a small snapshot of the variety of Comm Events that could be displayed.

.6.3.2 Communication Event ID

If you have the ID, enter it and that will be the only Event listed in the table of results. Use the radio buttons to reflect your entry. <P> This field is more than a place to enter what you might not know. For example, if you knew that the last 2 digits were 10, enter that with the radio button 'Contains' selected. Likewise, if the ID began with 'QU', select the 'Begins With' radio button and you will get a table with all the QU comm events. You could reduce that with a date range parameter entered as well.

.6.3.3 Party ID From

If you know who created the Communication, enter that here. You can use the popup search tool to find the Party ID if you only know the person's name or login ID.

.6.3.4 Party ID To

The recipient of the communication.

.6.3.5 Status ID

If you know the last entered Status of your Communication, you can enter that parameter. Status IDs include the following: <P> Entered
 Pending
 Read
 In-Progress
 Complete
 Resolved
 Referred
 Cancelled

.6.3.6 Contact Mech Type ID (drop-down box)

Was this a phone call? an email? a letter? Select the contact mech from the drop-down box. All of the standard mechanisms are listed there.

.6.3.7 Role Type ID From (drop-down box)

What Role was used by the Party which originated the communication? Was she the Blog Editor? Was he the Administrator? Select from the drop-down box.

.6.3.8 Cust Request ID

Was this communication in response to a Customer Request? Do you have the Request ID? Enter that here.

.6.3.9 Start Date (popup calendars)

Did the communication discuss a calendar event with a specified start date? Enter that here, but use the two calendars and bracket the date and time. You might need to alter the time because the popup calendar will put in the date you choose but the time is Now. Use time format 0:00:00.000 which is H:MM:SS.0<P> For example, if you think the date was around noon on December 1, 2005, in the top calendar enter November 30, 2005, then select radio button 'Greater Than From Day.' With the other calendar, enter December 3, 2005, then select radio button 'Up Thru Day.'

.6.3.10 Finish Date / Time (popup calendars)

Did the communication discuss a calendar event with a specified finish date? Enter that here, but use the two calendars and bracket the date and time. You might need to alter the time because the popup calendar will put in the date you choose but the time is Now. Use time format 0:00:00.000 which is H:MM:SS.0<P> For example, if you think the finish date was around noon on December 5, 2005, in the top calendar enter December 4, 2005, then select radio button 'Greater Than From Day.' With the other calendar, enter December 6, 2005, then select radio button 'Up Thru Day.'

.6.3.11 Subject

When you know the subject or part of the subject, enter it here. Use the radio buttons to reflect your entry.

.6.4 Found CommEvents

.6.4.1 ListLookupCommEvents



Found Communication Events

Communication Event Id	CommonPartyId From	CommonPartyId To	Status Id	Contact Mech Type Id	Role Type Id From	Role Type Id To	Start Date	Finish Date/Time	Cust Request Id	Subject	
10000	THE ADMINISTRATOR [admin]	Sherry Shopper [10011]	Entered	Email Address						OFBiz Demo - Your Order Is Complete #WS10000	<input type="button" value="Delete"/>
10010	Loyal Employee [10023]	THE ADMINISTRATOR [admin]	In-Progress	Electronic Address	Non-exempt (Hourly) Manager	Administrator		2006-01-03 10:58:20.465		Request for Vacation between Holidays	<input type="button" value="Delete"/>
10020	Blog Editor [BLOG_EDITOR]	Carla Consultant [10021]	In-Progress	Electronic Address	Blog Editor	Contractor	2006-01-05 08:15:23.312			February Newsletter	<input type="button" value="Delete"/>
10030	THE ADMINISTRATOR [admin]	Roger Ready [10120]	Complete	Email Address						OFBiz Demo - Your Order Is Complete #WS10040	<input type="button" value="Delete"/>
10040	THE ADMINISTRATOR [admin]	Sherry Shopper [10011]	Complete	Email Address						OFBiz Demo - Your Order Is Complete #WS10050	<input type="button" value="Delete"/>



Here is a Table of pending, active and completed Communication Events. Click on the Communication EventID # to view or edit.

.6.4.2 link buttons

.6.4.3 Table of communication events

.6.4.3.1 Communication Event ID

Click on this number to view or edit the communication.

.6.4.3.2 Common Party ID From

Who originated the communication.

.6.4.3.3 Common Party ID To

To whom the communication was addressed.

.6.4.3.4 Status ID

The status could be shown as one of the following: **Entered** **Pending** **Read** **In Progress** **Complete** **Resolved** **Referred** **Cancelled**

.6.4.3.5 Contact Mech Type ID

What was the method of communication: Phone, Email, etc.?

.6.4.3.6 Role Type ID From

The Role Type of the party originating the communication.

.6.4.3.7 Role Type ID To

The Role Type of the recipient of the communication.

.6.4.3.8 Start Date

Beginning of any period of activity discussed in the communication; need not be the origin date of the communication.

.6.4.3.9 Finish Date / Time

When the communication process will completed, or when the action discussed in the communication needs to be accomplished.

.6.4.3.10 Cust Request ID

If this is in response to a Customer Request, that ID will be here.

.6.4.3.11 Subject

What was the communication about.

.6.5 Edit Communication Event

.6.5.1 Discussion

Clicking on the Communications sub-tab under the Find tab takes you directly to the Party Manager > Comm > Communications > CommEvent sub-tab.<P> Existing Communications with a selected Party are given in a table here. If you click on the Communication Event ID, you are taken to the same screen as [New Communication], except that established fields are already populated. Click on the Party ID to go to the Party Profile screen.<p> When you have identified the Communications Event ID, you can use the other sub-tabs to navigate through the Edit screen and on to Purposes and Roles. If the communication is connected with a Quotation, WorkEfforts and CustRequests tabs give you more access to the Communication.

.6.5.2 CommEvent

.6.5.2.1 EditCommunicationEvent-commtab



Party Manager Application
Main Find Create Comm Visits Classifications Security Logout

CommEvent Purposes Roles WorkEfforts

Edit Communication Event

Communication Event Id 10020

Communication Event Type Id Face-To-Face

Party From BLOG_EDITOR

Party To 10021

Status In-Progress

Contact Mech Type Id Electronic Address

From Contact Mech

To Contact Mech

Role Type Id From Blog Editor

Role Type Id To Contractor

Contact List Id 9010

Start Date 2006-01-05 08:15:23.312

Finish Date/Time

Subject February Newsletter

Content Mime Type Id application/msword

Carla,
Please prepare a newsletter to go out the end of this month (January) to the Contact List regarding specials offered during February. Especial attention should be made for Valentines Day and Presidents Day events.
Bloggie

Note
Need to start preparation of a Febr. newsletter ASAP!



Edit Comm Event under the Comm tab brings up the row of sub-tabs to provide tools for recording Comm Events.

.6.5.2.2 link buttons

[Save] [CommEvent] [Purposes] [Roles] [WorkEfforts]

.6.5.2.3 Communication Event ID

Do not change or you will be creating a New Event.

.6.5.2.4 Communication Event Type ID (drop-down box)

Select from one of the following to define the Type of a Communication Event that this is: <P> ---
 Comment/Note
 Email
 Face-To-Face
 Fax
 Letter
 Phone
 Web Site

.6.5.2.5 Party ID From (popup search tool)

Use the popup search tool to identify the Party initiating or originating the Communication.

.6.5.2.6 Party ID To (popup search tool)

Use the popup search tool to identify the Party receiving or corresponding in the Communication.

.6.5.2.7 Status (drop-down box)

The status could be selected from one of the following; note that the Status options presented in the list will vary depending upon the progress of the Communication <P> Entered

 Set Pending (Pending)
 Pending
 Read
 In Progress
 Complete
 Resolved
 Referred
 Cancel (Cancelled)
 Cancelled

.6.5.2.8 Contact Mech Type Id (drop-down box)

What communication method (Contact Mechanism) will be used for this iteration of this communication? Select from the drop-down box. Choices might include the following: <P> ---
 Electronic Address
 Email Address
 Internet Domain Name
 Internet IP Address
 Phone Number
 Postal Address
 Web/URL Address

.6.5.2.9 From Contact Mech

The preferred Contact Mech or the one used in receiving the most recent iteration of this communication.

.6.5.2.10 To Contact Mech

The preferred Contact Mech or the one used in sending the most recent iteration of this communication.

.6.5.2.11 Role Type ID From (drop-down box)

Select the Role being performed by the Originator from the drop-down box. If an appropriate Role is not listed in the drop-down box, you can create one.
 - 1.) Go to the Party Manager > Find tab.
 - 2.) Select any Party.
 - 3.) From the viewprofiles screen, select the Roles tab.
 - 4.) Use the tool at the bottom of the viewroles screen for creating a new Role.

.6.5.2.12 Role Type ID To (drop-down box)

From the drop-down box, select the Role in which the Recipient is receiving the Communication.

.6.5.2.13 Contact List ID (popup search tool)

If the Communication is to be broadcast to members of a Contact List, use the search tool to identify and select the Contact List ID.

.6.5.2.14 Customer Request #

If this Communication Event is part of a Request, the number will appear here. If there is no field given, then the Communication did not originate in the Request function.

.6.5.2.15 Start Date (/Time) (popup calendar)

Enter the time of origin for this Communication.

.6.5.2.16 Finish Date /Time (popup calendar)

This could be the date and time when the Communication is Complete, Referred, Resolved or Cancelled.

.6.5.2.17 Subject

This should be short and concise.

.6.5.2.18 Content Mime Type Id (drop-down box)

What form or format was used in preparation of the communication content? (Use the drop-down box to identify.)

.6.5.2.19 Content

This is where the 'meat' of the 'event' is recorded. You may copy and paste from other sources or manually enter or provide a link to a file, etc.

.6.5.2.20 Note

Here will go the background, the references, or whatever supporting material you wish to append to the content of the message itself.

.6.5.3 Purposes

.6.5.3.1 UpdateCommPurposes

id:[13007] image:

The screenshot shows the 'Party Manager Application' interface. At the top, there is a navigation bar with tabs for Accounting, Catalog, Content, Example, Facility, Manufacturing, Marketing, Order, Party, Shark, WebTools, and Work Effort. Below this is a sub-navigation bar with tabs for Main, Find, Create, Comm, Visits, Classifications, Security, and Logout. The main content area is titled 'Communication Event Purposes' and contains a table with one row: 'Activity Request' and a 'Delete' button. Below the table is a form to 'Add Communication Event Purpose' with a dropdown menu for 'Communication Event Prp Typ Id' set to 'Meeting' and an 'Add Purpose' button. The footer includes W3C CSS and XHTML 1.0 logos, a copyright notice for 2001-2006, and the URL www.ofbiz.org.

Add or delete a Purpose Type to the Comm Event here. There may be multiple Purposes assigned to a single Comm Event.

.6.5.3.2 link buttons

[Delete] [Add Purpose] [CommEvent] [Purposes] [Roles] [WorkEfforts]

.6.5.3.3 Communication Event Purposes

The only column in this List is <I>Communication Event Prp Typ ID</I>; remove any Purpose from the list using the [Delete] link, or add a new Purpose Type with the tool below.

.6.5.3.4 Communication Event Prp Typ ID (drop-down box)

Select an Event Purpose Type from the drop-down box. When matched with the correct Party ID, click on [Add Purpose].<P> Purposes listed might include the following:
 Activity Request
 Conference
 Customer Service Call
 Inquiry
 Meeting
 Sales Follow Up
 Seminar
 Support Call

.6.5.4 Roles

.6.5.4.1 UpdateCommRoles

id:[13009] image:

The screenshot shows the OFBiz Party Manager Application interface. At the top, there is a navigation bar with tabs for Accounting, Catalog, Content, Example, Facility, Manufacturing, Marketing, Order, Party, Shark, WebTools, and Work Effort. The 'Party' tab is selected. Below the navigation bar, there is a header for 'Party Manager Application' with sub-tabs for Main, Find, Create, Comm, Visits, Classifications, Security, and Logout. The 'Roles' tab is selected, showing a table of 'Communication Event Roles' and an 'Add Communication Event Role' form.

Communication Event Roles

Party Id	Role Type Id	
Carla Consultant 10021	Blog Author	Delete
Carla Consultant 10021	Blog Publisher	Delete
Carla Consultant 10021	Contractor	Delete
Loyal Employee 10023	Blog Administrator	Delete
Loyal Employee 10023	Blog Editor	Delete

Add Communication Event Role

Party Id

Role Type Id

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Specify the Roles of each Party involved in a Communication here.

.6.5.4.2 link buttons

[Delete] [Add Role] [CommEvent] [Purposes] [Roles] [WorkEfforts]

.6.5.4.3 Communication Event Roles

.6.5.4.3.1 Party ID

Which Party has this role as related to the Communication Event.

.6.5.4.3.2 Role Type ID

Which Role Type has been assigned to this Party for this Comm Event.

.6.5.4.4 Add Communication Event Role

.6.5.4.4.1 Party ID (popup search tool)

Identify the Party, either by entering their Party ID or selecting from the popup tool.

.6.5.4.4.2 Role Type ID (drop-down box)

Select the Role from the drop-down list. Remember that this is to define the Role played within the Communication Event, not just the regular job title of the Party. Also remember that if a Party does not have the Role already assigned as a potential role under Party > Find > Role(s), it cannot be applied here. If an error

message occurs, click on Role(s) and assign the role, then return here.

.6.5.5 WorkEfforts

.6.5.5.1 Discussion

When there are Communication Events related to WorkEfforts, they will be shown here. New WorkEfforts can be quickly created and related to the Comm Event from this screen. See the major Work Effort application for details about this screen.

.6.5.5.2 AddCommEventWorkEffort



Party Manager Application

Communication Work Efforts

Quick Add Comm. Event Id

Enter existing WorkEffort Id below

OR add new WorkEffort data below to create new entity (leave WorkEffort Id empty)

Quick Assign Party Id

Name*

Description

Type*

Purpose

Status*

Percent Complete

Priority

Scope

Estimated Start Date

Estimated Completion Date

Actual Start Date

Actual Completion Date

Work Effort Parent Id

Location Desc

Estimated Milli Seconds

Estimated Setup Millis

Estimate Calc Method

Actual Milli Seconds

Actual Setup Millis

Total Milli Seconds Allowed

Total Money Allowed

Currency

Special Terms

Time Transparency

Universal Id

Source Reference Id

Fixed Asset Id

Facility Id

Info Url

Service Loader Name

Quantity To Produce

Quantity Produced

Quantity Rejected

Reserv Persons

Reserv 2nd P P Perc

Reserv Nth P P Perc

Requirement Id



New WorkEffort based upon a Communication Event is established from this screen.

.6.5.5.3 link buttons

[Save] [CommEvent] [Purposes] [Roles] [WorkEfforts]

.6.6 Create Reply/New Communication

.6.6.1 EditCommunicationEvent-reply

id:[DOCPRT3848] image:



Welcome THE ADMINISTRATOR!
2005-09-16 06:45:25.64

English (United States)

Accounting Catalog Content Example Facility Manufacturing Marketing Order Party Shark WebTools WorkEffort

Party Manager Application

Main Find Create Comm Visits Classifications Security

New Communication

[New Communication]

[Reply]

Communication Event Type Id

Party Id From

Party Id To

Status

Contact Mech Type Id

Role Type Id From

Role Type Id To

Contact List Id

Start Date

Finish Date/Time

Subject

Note

Content



When you choose to [Reply] to a Communication item, this blank screen (linked to the Event) is presented.

.6.6.2 link buttons

[New Communication] [Reply] [Save] [Cancel / Done] [Profile] [Role(s)] [Relationships] [Communications] [Vendor] [Tax Infos] [Shopping Lists] [Segments] [Classifications] [Contact List]

.6.6.3 Discussion

The Edit/View form is essentially the same as the Reply and the New Communication screen: the default selections are there, no content is given, nothing indicates whether this is a Reply or a New Communication Event.
 All of the same items were discussed above when we Viewed the Communication except there is no CommunicationEventID number. That is associated with a Reply and created internally with a New Communication Event.<P> You will need, therefore, to identify the Party to whom you are replying, choose the appropriate Contact Mechanism, etc. What you see in some of the fields above are default values, not populated data. Complete each of the relevant parts.<P> Internally, however, [Reply] and [New Communication] are different. Reply is linked to the original Communications Event ID for tracking purposes. The Reply will be part of the electronic record. A New Communication is linked between whomever you assign for the Party ID From and To codes.

.7 Visits

.7.1 Active Visit Listing

Click on the column labels to sort the column. For example, click on Party ID and all the contents will be sorted by the number then the letter of the ID. This will group all visits of a particular ID or client server, etc.

.7.1.1 showvisits

id:[DOCPRT3945] image:



Welcome THE ADMINISTRATOR!
2006-01-31 08:11:31.188

English (United States)

Accounting Catalog Content Example Facility Manufacturing Marketing Order **Party** Shark WebTools Work Effort

Party Manager Application

Main Find Create Comm Visits Classifications Security

Active Visit Listing

1 - 11 of 12

Visit ID	Visitor ID	Party ID	User Login ID	New User	Web App	Client IP	From Date	Thru Date
10655	10000	admin	admin	N	webtools	127.0.0.1	2006-01-31 08:10:51.375	
10654	10000	admin	admin	N	shark	127.0.0.1	2006-01-31 08:10:46.500	
10653	10000	admin	admin	N	ordermgr	127.0.0.1	2006-01-31 08:10:36.469	
10652	10000	admin	admin	N	marketing	127.0.0.1	2006-01-31 08:10:31.969	
10651	10000	admin	admin	N	manufacturing	127.0.0.1	2006-01-31 08:10:27.094	
10650	10000	admin	admin	N	facility	127.0.0.1	2006-01-31 08:10:21.875	
10649	10000	admin	admin	N	example	127.0.0.1	2006-01-31 08:10:17.031	
10648	10000	admin	admin	N	content	127.0.0.1	2006-01-31 08:10:11.406	
10647	10000	admin	admin	N	accounting	127.0.0.1	2006-01-31 08:09:57.891	
10646	10000	admin	admin	N	partymgr	127.0.0.1	2006-01-31 08:06:32.625	
10645	10000	admin	admin	N	catalog	127.0.0.1	2006-01-31 08:06:00.453	

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Initially shows all of the current day's visits by the Party currently logged in. Click to view all activity.

.7.1.2 link buttons

.7.1.3 Visit ID

Click on the Visit ID number to be taken to the Visit Detail Screen. See details below.

.7.1.4 Visitor ID

When a non-recognized Party logs in, before they are assigned a login ID, they are given a Visitor ID. The New User column should also indicate Y.

.7.1.5 Party ID

The Party which logged in for this Visit. Click on this ID to see the viewprofile screen for this Party.

.7.1.6 User Login ID

The identity under which they logged in. For example, a Party might be a customer as well as an employee and have separate login identities for each. This column indicates the Login ID.

.7.1.7 New User (Y or N)

If this is a first-time visit, the Party would be a New User.

.7.1.8 Web App

Which Application was the Party using: Accounting? Catalog? Order Manager? This column indicates which was visited.

.7.1.9 Client IP

Where the visit originated from, the Internet Provider of the Client.

.7.1.10 From Date (includes time)

When the visitor entered the Application is given here.

.7.1.11 Thru Date (includes time)

There is no departure time from the Application if the visitor merely went through and then on to another app. The only time Thru Date (and time) are recorded is if there has been activity within that application.

.7.2 Visit Detail screen

.7.2.1 visitdetail



Party Manager Application

Visit Detail

VisitID / SessionID : 10643 / AE052BD1E21E9DCC14AFF39D1596B6F5.jvm1
Visitor ID : 10000
PartyID / UserLoginID : /
User Created : N
WebApp : partymgr
Server : /
Client : /
Client User :
Initial Locale : en_US
Initial Request :
Initial Referrer :
Initial User Agent : Mozilla/5.0 (Windows; U; Windows NT 5.1; en-US; rv:1.7.11) Gecko/20050728
Cookie :
From Date / Thru Date : 2006-01-30 09:23:26.165 / 2006-01-30 11:40:39.915

Hit Tracker

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Content ID	Type	Size	Start Time	Time	URI
partymgr.EditCommunicationEvent	REQUEST	?	2006-01-30 11:40:39.915	79	https://localhost:8443/partymgr/control/EditCo...
partymgr.FindCommunicationEvents	REQUEST	?	2006-01-30 11:40:37.494	250	https://localhost:8443/partymgr/control/FindCo...
partymgr.EditCommunicationEvent	REQUEST	?	2006-01-30 11:40:23.384	375	https://localhost:8443/partymgr/control/EditCo...
partymgr.UpdateCommRoles	REQUEST	?	2006-01-30 11:40:09.228	359	https://localhost:8443/partymgr/control/Update...
partymgr.UpdateCommPurposes	REQUEST	?	2006-01-30 11:39:50.681	281	https://localhost:8443/partymgr/control/Update...
partymgr.EditCommunicationEvent	REQUEST	?	2006-01-30 11:39:33.087	47	https://localhost:8443/partymgr/control/EditCo...
partymgr.ListPartyCommEvents	REQUEST	?	2006-01-30 11:39:29.056	250	https://localhost:8443/partymgr/control/ListPa...
partymgr.viewprofile	REQUEST	?	2006-01-30 11:39:21.009	1,188	https://localhost:8443/partymgr/control/viewpr...
partymgr.findparty	REQUEST	?	2006-01-30 11:39:18.837	250	https://localhost:8443/partymgr/control/findpa...
partymgr.findparty	REQUEST	?	2006-01-30 11:39:06.197	203	https://localhost:8443/partymgr/control/findpa...
partymgr.EditCommunicationEvent	REQUEST	?	2006-01-30 11:37:47.712	78	https://localhost:8443/partymgr/control/EditCo...
partymgr.ListLookupCommEvents	REQUEST	?	2006-01-30 11:37:44.337	125	https://localhost:8443/partymgr/control/ListLo...
partymgr.FindCommunicationEvents	REQUEST	?	2006-01-30 11:37:38.884	266	https://localhost:8443/partymgr/control/FindCo...
partymgr.EditCommunicationEvent	REQUEST	?	2006-01-30 11:37:30.478	62	https://localhost:8443/partymgr/control/EditCo...
partymgr.FindCommunicationEvents	REQUEST	?	2006-01-30 11:37:27.134	266	https://localhost:8443/partymgr/control/FindCo...
partymgr.FindCommunicationEvents	REQUEST	?	2006-01-30 11:36:54.462	63	https://localhost:8443/partymgr/control/FindCo...
partymgr.EditCommunicationEvent	REQUEST	?	2006-01-30 11:36:51.806	281	https://localhost:8443/partymgr/control/EditCo...
partymgr.ListCommWorkEfforts	REQUEST	?	2006-01-30 11:36:44.697	62	https://localhost:8443/partymgr/control/ListCo...
partymgr.UpdateCommRoles	REQUEST	?	2006-01-30 11:36:41.931	391	https://localhost:8443/partymgr/control/Update...
partymgr.UpdateCommPurposes	REQUEST	?	2006-01-30 11:36:38.056	391	https://localhost:8443/partymgr/control/Update...

1 - 20 of 85 |

Page Push/Following

Push URL

Follow Session



Details of the visit are seen here. Some content items are linked to additional information.

.7.2.2 link buttons

[Submit]

.7.2.3 Visit Detail

.7.2.3.1 Visit ID/Session ID

The first number (Visit ID) is what you clicked on in the showvisits screen. The second number is generated by the application.

.7.2.3.2 Visitor ID

The number used to identify a non-registered User on their first login.

.7.2.3.3 Party ID/User Login ID

Click on either to go to the Party Manager > View Profile screen.

.7.2.3.4 User Created (Y/N)

Was a new User ID created during this visit?

.7.2.3.5 WebApp

Which application within OFBiz was visited? The initial login will always be either into ecommerce or the Party manager.

.7.2.3.6 Server

The first box should identify the Server you are operating your application from. The second box should identify the actual computer you are running in.

.7.2.3.7 Client

A click on this URL takes you to <http://ws.arin.net/cgi-bin/whois.pl?queryinput=> for whatever details they might have about the site.

.7.2.3.8 Client User

If there is any information provided about the User, it will display here.

.7.2.3.9 Initial Locale

Gives the language requested by the visitor.

.7.2.3.10 Initial Request

Internal processing information.

.7.2.3.11 Initial Referer

Internal processing information.

.7.2.3.12 Initial User Agent

Type of browser being used by the Visitor.

.7.2.3.13 Cookie

If there was a cookie implanted, what it was.

.7.2.3.14 From Date / Thru Date

Login Date (includes time) / Logout Date. If the Visit is still active while viewing this visit, the note indicates that. Also, if the visitor left the application to move to another, the Thru Date is for when the visitor departed from the App, not necessarily from the session.

.7.2.4 Hit Tracker

.7.2.4.1 Content ID

This ID is a combination of the application name and the name of the screen presented.

.7.2.4.2 Type

What type of a hit? Generally this will be a Request.

.7.2.4.3 Size

If the hit was a transfer input of data files, the size would be given here.

.7.2.4.4 Start Time

When was the screen first displayed? Includes date and the time in milliseconds.

.7.2.4.5 Time

This is the duration of the visit in seconds.

.7.2.4.6 URI

Follow this link back for more details of the visit.

.7.2.5 Page Push / Following

.7.2.5.1 Push URL

TBD. Documentation to follow.

.7.2.5.2 Follow Session

TBD. Documentation to follow.

.8 Classifications

.8.1 showclassgroups

id:[13135] image:

The screenshot shows the Party Manager Application interface. At the top, there is a logo for 'OPEN FOR BUSINESS OFBiz.org' and a welcome message for 'THE ADMINISTRATOR!' dated '2006-01-31 10:47:23.594'. A language dropdown menu is set to 'English (United States)'. Below the navigation bar, the 'Party' tab is selected. The main content area displays 'Classification Groups' with a 'Create New Party Classification Group' button. A table lists existing classification groups with columns for ID, Type, Parent ID, and Description, each with a 'Delete' button.

Classification Group Id	PartyClassificationTypeId	Parent Id	Description	
10000	Organization	10000	Internet Marketing	Delete
10001	Person	10002	Those persons who are customers but not employees.	Delete
10002	Person		Those Persons who are customers.	Delete
10010	Person	10002	Those persons who are both Employees and Customers	Delete

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Powered By OFBiz

Currently existing Classification Groups. Click on the GroupID to edit, or [Create New Party Classification Group] for a new one.

.8.2 link buttons

[Delete] [Create New Party Classification Group]

.8.3 Classification Group ID

Click on the ID to edit the Classification Group.

.8.4 Party Classification Type ID

These could be one of the following: <P> Minority
 Income
 Industry
 Organization
 Person
 Size

.8.5 Parent ID

If this is a Child of another ID, the Parent is given here.

.8.6 Description


What distinguishes this Classification from another.

.8.7 Tool to create Classification Group

.8.7.1 EditPartyClassificationGroup-new

Party Manager Application

Classification Group

PartyClassificationTypeId	<input type="text" value="Income"/>
Parent Id	<input type="text" value="10002"/> 
Description	<input type="text" value="Those Customers whose Income > \$100,000"/>
	<input type="button" value="Save"/>



A new Classification Group is created at this screen.

.8.7.2 link buttons

[Save]

.8.7.3 PartyClassificationTypeId (drop-down box)

Select from the drop-down ID box. Selections could be: <P> Minority
 Income
 Industry
 Organization
 Person
 Size

.8.7.4 Parent ID (popup search tool)

If there is a parent, enter its ID here. Use the popup search tool to find existing Party Classifications.

.8.7.5 Description

Describe the Group's characteristics such that they are differentiated from their Parent and from other Groups.

.8.8 Edit Existing Classification Group

.8.8.1 Classification Groups

.8.8.1.1 EditPartyClassification Group



Classification Group

Classification Groups

Classification Group Id: -[cannot change without re-creating]-

PartyClassificationTypeId:

Parent Id:

Description:



Edit an existing Classification Group at this screen; click on [Parties] to associate a Party with this Group.

.8.8.1.2 link buttons

[Save] [Classification Groups] [Parties]

.8.8.1.3 Classification Group ID

This is the identity of what you are now editing; obviously it cannot be changed.

.8.8.1.4 Party Classification Type ID (drop-down box)

Although you can program in other Types, these are the default types that come with Open For Business: <P>---
 Income
 Industry
 Minority
 Organization
 Person
 Size

.8.8.1.5 Parent ID (popup search tool)

Unless you are creating a Parent Group, use the popup search tool to assign this Group to its Parent.

.8.8.1.6 Description

This is actually a long-name description, so it needs to be succinct yet differentiate this Group from all others. At the same time, it should specify the larger Group of which this is a part so the relationships are obvious.

.8.8.2 Parties

.8.8.2.1 EditPartyClassificationGroupParties



Classification Groups

Description [Classification Group Id]	PartyId	From Date	Thru Date	
Those persons who are both Employees and Customers [10010]	10021	2005-12-05 11:23:50.671	<input type="text"/>	<input type="button" value="Save"/> <input type="button" value="Delete"/>
Those persons who are both Employees and Customers [10010]	10023	2005-12-05 11:24:24.078	<input type="text"/>	<input type="button" value="Save"/> <input type="button" value="Delete"/>

Classification Group Id

Party ID

From Date

Thru Date



Here you associate a Party with an existing Classification Group. Use the table to identify existing members.

.8.8.2.2 link buttons

[Save] [Delete] [Classification Groups] [Parties]

.8.8.2.3 Table of existing assignments

.8.8.2.3.1 Description (Classification Group ID)

The descriptive ID for the group, with its ID number in parentheses.

.8.8.2.3.2 Party ID

The Party ID of the Party assigned to this Group.

.8.8.2.3.3 From Date

When the assignment was made.

.8.8.2.3.4 Thru Date (popup calendar)

Unless blank, when the assignment will expire. You may edit this date using the popup calendar.

.8.8.2.4 Tool to assign Parties to Group

.8.8.2.4.1 Classification Group ID

The currently selected Group to which you are adding a Party. This cannot be changed here. If you wish to edit another Group, return to the Classifications screen and select a different one.

.8.8.2.4.2 Party ID (popup search tool)

Either enter the Party ID or select it with the popup search tool. First, check the table above to avoid an

attempted duplication of assignment.

.8.8.2.4.3 From Date (popup calendar)

Will automatically enter Now upon assignment unless you select a different date/time using the popup calendar.

.8.8.2.4.4 Thru Date

Generally you would leave this blank unless you expressly wish an assignment to expire at a future known date.

.9 Security

.9.1 Security Groups List

.9.1.1 FindSecurityGroup

id:[DOCPRT3986] image:



Welcome THE ADMINISTRATOR!
2006-01-31 16:59:21.834

English (United States)

Accounting Catalog Content Example Facility Manufacturing Marketing Order Party Shark WebTools Work Effort

Party Manager Application

Main Find Create Comm Visits Classifications Security

SecurityGroups List

[\[New Security Group\]](#)

Security Group ID	Description
[ORDERPROC]	Admin group for restricted order processing.
[WEB_BLOG_TECH]	All technical permissions to manage / maintain website content.
[CATALOGADMIN]	Catalog Admin group, has all catalog permissions.
[VIEWADMIN]	Demo Admin group, has all view permissions.
[FLEXADMIN]	Flexible Admin group, has all granular permissions.
[FULLADMIN]	Full Admin group, has all general permissions.
[BIZADMIN]	Full Business Applications permission group, has all business app admin permissions, not technical permissions.
[CATALOGADMIN_LTD]	Limited Catalog Admin group, has limited catalog permissions.
[ORDERSUPPLIER_LTD]	Limited Order Admin group for Supplier Agents.
[ORDERADMIN_LTD]	Limited Order Admin group, has all limited order permissions.
[ORDERADMIN]	Order Admin group, has all order permissions.
[ORDERENTRY]	Order Entry Admin group; permissions for creating orders.
[ORDERENTRY_ALL]	Order entry permission for all stores. No special role is needed.
[ORDERPURCH]	Order entry with purchasing permissions
[POSCLERK]	POS Clerk
[PARTYADMIN]	Party Admin group, has all party permissions.



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This table names and describes all of the existing Security Groups. Click on a Security Group ID to edit it.

.9.1.2 link buttons

[\[New Security Group\]](#)

.9.1.3 Security Group ID

Click on this link to Edit the Security Group.

.9.1.4 Description

Description given when the Security Group was created. Can be changed at the EditSecurityGroup screen.

.9.2 Edit Security Group screen

.9.2.1 Edit Security Group

.9.2.1.1 EditSecurityGroup

id:[DOCPRT3991] image:



Welcome THE ADMINISTRATOR!
2006-01-31 17:14:58.053

English (United States)

Accounting Catalog Content Example Facility Manufacturing Marketing Order Party Shark WebTools Work Effort

Party Manager Application

Main Find Create Comm Visits Classifications Security

Edit Security Group With ID [WEB_BLOG_TECH]

Security Group ID -[cannot change without re-creating]-

Description



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When you have clicked on a Security Group, this is the first screen following. Only the Description can be changed here.

.9.2.1.2 link buttons

**** ****

.9.2.1.3 Security Group ID

Although it appears to be capable of changing, the ID cannot be edited. If the 'Name' must be changed, create a new Security Group ID and delete the incorrect one.

.9.2.1.4 Description

Brief phrase that defines this Security Group from all others.

.9.2.2 Permissions

.9.2.2.1 EditSecurityGroupPermissions

Party Manager Application

Main Find Create Comm Visits Classifications Security

Permissions for SecurityGroup with ID [WEB_BLOG_TECH]

Permission ID		
[CATALOG_ROLE_UPDATE]	Limited Update operations in the Catalog Manager.	<input type="button" value="[Remove]"/>
[MARKETING_ADMIN]	ALL operations in the Marketing Manager.	<input type="button" value="[Remove]"/>
[ORDERMGR_PURCHASE_VIEW]	View purchase orders in the Order Manager.	<input type="button" value="[Remove]"/>
[ORDERMGR_ROLE_VIEW]	Limited view operations in the Order Manager.	<input type="button" value="[Remove]"/>

Add Permission (from list) to SecurityGroup

Permission ID Permission required, in addition to other applicable permissions, to maintain product price information including prices, promotions, and price rules.

Add Permission (manually) to SecurityGroup

Permission ID



Table of current Permissions for the selected Security Group (from which any Permission can be deleted) and a tool to specify additional Permissions.

.9.2.2.2 link buttons

[New Security Group] [Remove] [Add] [Security Groups] [Permissions] [User Logins]

.9.2.2.3 Table of assigned Permissions

.9.2.2.3.1 (Permission ID) with Description

Click the [Remove] button to delete from permissions.

.9.2.2.4 Add Permission (drop-down box)

Add Permission ID from the drop-down list to the Security Group.

.9.2.2.5 Add Permission (manually) to Security Group

Enter the Permission ID then click on [Add].

.9.2.3 User Logins

User Logins for Security Group with ID 'Nnnnnn'.

.9.2.3.1 EditSecurityGroupUserLogins



Party Manager Application

Security Groups Permissions **User Logins**

UserLogins for SecurityGroup with ID [WEB_BLOG_TECH]

[\[New Security Group\]](#)

User Login Id	From Date	Thru Date - Update	Party
bizadmin	2006-01-31 17:12:55.053	<input type="text"/> <input type="button" value="Update"/>	Business Administrator [bizadmin] <input type="button" value="Remove"/>
ltdadmin	2005-01-01 17:13:08.474	2006-12-31 17:13:23.881 <input type="button" value="Update"/>	Limited Administrator [ltdadmin] <input type="button" value="Remove"/>

Add UserLogin to Security Group

User Login Id

From Date

Thru Date



Control access to Security Groups by associating their Logins with the Security Group.

.9.2.3.2 link buttons

[\[New Security Group\]](#) [\[Update\]](#) [\[Remove\]](#) [\[Add\]](#) [\[Security Groups\]](#) [\[Permissions\]](#) [\[User Logins\]](#)

.9.2.3.3 Table of UserLogins

.9.2.3.3.1 User Login ID

The ID under which the Party would login to have these permissions.

.9.2.3.3.2 From Date

Date the Permission was assigned or, as shown in the example, the date when the Permission becomes effective. Note that the text is highlighted in red to show that permission was not current at the time the screen was captured for this illustration.

.9.2.3.3.3 Thru Date (popup calendar)

Date the assignment of permission will expire. Leave blank only if you want the permission to be indefinite.<p> There are security reasons for requiring periodic expiration of access or authorization privileges. For example, an employee might leave or be fired; if you forgot to remove permissions at the time of their departure, an expiration will ensure eventual closing of this potential security breach.

.9.2.3.3.4 Party

The Party ID is a link to the Party > Profile for that ID. The description precedes the Party ID in this cell.

.9.2.3.4 Add UserLogin to this Security Group

.9.2.3.4.1 User Login ID

The login under which the Party will have these permissions.

.9.2.3.4.2 From Date (popup calendar)

Date the Permission was assigned or, as shown in the example, the date when the Permission becomes effective. Note that the text is highlighted in red to show that permission was not current at the time the screen was captured for this illustration.

.9.2.3.4.3 Thru Date (popup calendar)

Date the assignment of permission will expire. Leave blank only if you want the permission to be indefinite. This date can be changed in the table above after the assignment has been made.<p> There are security reasons for requiring periodic expiration of access or authorization privileges. For example, an employee might leave or be fired; if you forgot to remove permissions at the time of their departure, an expiration will ensure eventual closing of this potential security breach.

.9.3 Create New Security Group

>> Edit Security Group With ID ###

.9.3.1 EditSecurityGroup-new

id:[DOCPRT4013] image:

The screenshot displays the 'Party Manager Application' interface. At the top, there is a navigation menu with tabs for Accounting, Catalog, Content, Example, Facility, Manufacturing, Marketing, Order, Party, Shark, WebTools, and Work Effort. The 'Party' tab is selected. Below the navigation menu, there is a header for 'Party Manager Application' with sub-tabs: Main, Find, Create, Comm, Visits, Classifications, Security, and Logout. The 'Security' tab is active, showing the 'Edit Security Group With ID []' form. The form has a link for '[New Security Group]' and two input fields: 'Security Group ID' with the value 'WEB_BLOG_TECH' and 'Description' with the value 'All technical permissions to manage / maintain website content.'. There is an 'Update' button below the description field. At the bottom of the page, there are logos for W3C CSS and W3C XHTML 1.0, and a copyright notice: 'Copyright (c) 2001-2005 The Open For Business Project - www.ofbiz.org Powered By OFBiz'. In the top right corner, there is a welcome message: 'Welcome THE ADMINISTRATOR! 2005-12-05 12:53:35.765' and a language dropdown menu set to 'English (United States)' with a 'Set' button.

A new Security Group is created here with an ID and a description. Permissions are associated elsewhere.

.9.3.2 link buttons

[New Security Group] [Update]

.9.3.3 Security Group ID

Create the name (ID) of the new Security Group here.

.9.3.4 Description

Provide a concise yet unique Description to differentiate this Security Group from all others.