Internet Applications

Sage MAS 500

Introducing Internet Applications

1

The Sage MAS 500 Internet Applications maximize your system's capabilities with modules that run from a Web server. This chapter describes the modules and how to install them.

In this chapter

Internet Applications Modules

Overview

Description

The Sage MAS 500 Internet Applications consist of the following modules:

- eCustomer enables your customers to place orders directly to your accounting system from the Internet.
- eSalesforce enables salespeople to manage their sales contacts anywhere through a Web browser.
- eExecutive enables executives to view company financial information from their Web browser.
- eTimesheets enables users to enter and approve timesheets and expense reports.
- Sage MAS 500 Remote Client enables you to run the Sage MAS 500 client software through a Web browser and Microsoft Terminal Services Advanced Client. For information about using Sage MAS 500 with Terminal Services, see the *Installation and System Configuration* guide.

eCustomer Features

Overview

Summary of features

eCustomer provides what you need to develop a business-to-business e-commerce system linked to your financial data in Sage MAS 500. It includes:

- Data processing enhancements designed for Web-based processing.
- Enhancements to the Common Information, Inventory Management, and Sales Order modules to set up Web site folders; maintain users of the Web site; select items to sell through the Web site, organize them into groups and attach images to them; and process or purge sales orders with errors.
- A Web site that runs on IIS. You can customize the site with Microsoft Visual InterDev and change security settings to fit your company's needs.

Because eCustomer is a part of Sage MAS 500, purchases made from the Web site update the financial information in Sage MAS 500.

eCustomer Architecture

Components used by eCustomer

eCustomer uses the following Microsoft components to perform transaction processing on the Internet:

- COM+ applications are designed for processing on the Internet. They manage, package, and provide security for transactions.
- IIS is used as the Internet server because it provides security, extensibility, and a complete set of tools for developing a Web site with dynamic information.

- Microsoft Messaging Queue (MSMQ) processes data in queues so that users do not have to wait for the database to be updated before completing a transaction. Transactions are completed when the database is available.
- OLE DB provides links between the databases and the ActiveX Data Objects (ADO) used as data interfaces. OLE DB enables you to specify servers and provides better performance than ODBC.
- Active Server Pages are used by the Web site to retrieve and display data. You can customize the format and scripting to meet your needs.

eCustomer Integration with the Rest of MAS 500

Introduction

This section describes how eCustomer fits in with the rest of Sage MAS 500. For information about using these features to configure eCustomer, see Chapter 5, *Configuring the System for eCustomer*.

Product categories

Product categories enable you to organize the merchandise on your Web site into different groups, such as refrigerators, microwaves, and dishwashers. Within each category, you can create an unlimited number of subcategories. You can attach inventory and non-inventory items to product categories, assign an item to more than one product category, and change categories when needed.

For more information about this feature, see *Making Items Available for Sale* on page 95.

Attaching images to items

eCustomer enables you to attach a number of image files to the items you sell through the Web site.

When the customer selects an item on the order entry page, the image you selected appears in an adjacent frame. If you have more than one image assigned to this inventory item, a pair of buttons appears that enables you to browse through images.

You would provide more than one image if you want to show different views of the product, such as showing the exterior and interior of a refrigerator, close-ups of details, or the item in different colors. You can use images on your Web server, or you can use images available on the Internet.

Managing external users of the Web site

To support customers who will use the Web site, eCustomer adds features for managing user names and passwords, granting buyers different levels of access to the site, and setting transaction limits. For information, see Chapter 5, *Configuring the System for eCustomer*.

Database enhancements

eCustomer requires an additional Sage MAS 500 database called the Internet application database. This database offers the following benefits:

- Greater security: Data used on the Web site is kept separate from the rest of your Sage MAS 500 data. You can configure the Internet application database with different security so it is available to Web users while keeping the Sage MAS 500 system and application database secure.

- Greater performance and availability: Customers do not have to wait to get product information or for orders to update the Sage MAS 500 application database. Transactions are placed in a queue and processed when the Sage MAS 500 production database is available.

For more information about this database, see the *Installation and System Configuration* guide.

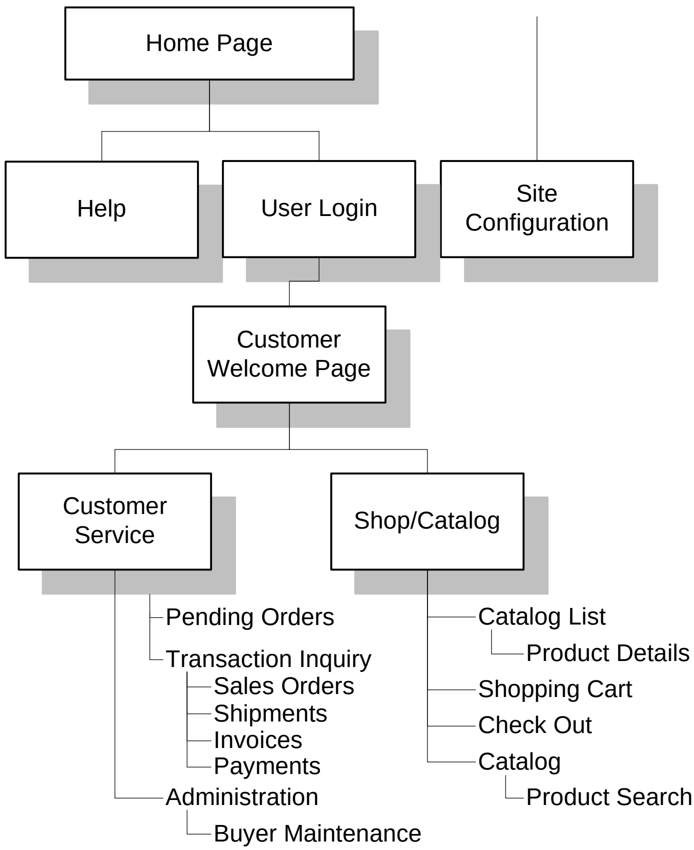
eCustomer Web Site Features

Overview of Web site

The Web site provided with eCustomer is designed to be flexible and freely customizable. The Active Server Pages can be modified to use your company's graphics and design schemes. You can have the Web site installed on your preferred host and use your preferred system of security. This section describes features and options of the eCustomer Web site.

Site structure

The basic eCustomer Web site has the following structure:



Site customization

You can link these pages to your existing site, add pages, and customize the pages to fit your needs. eCustomer comes with sample home pages that you can customize or replace with your own.

To get full functionality from the site, it is recommended that you do not remove any of the pages from the User Login branch of the Web site.

Order Processing in eCustomer

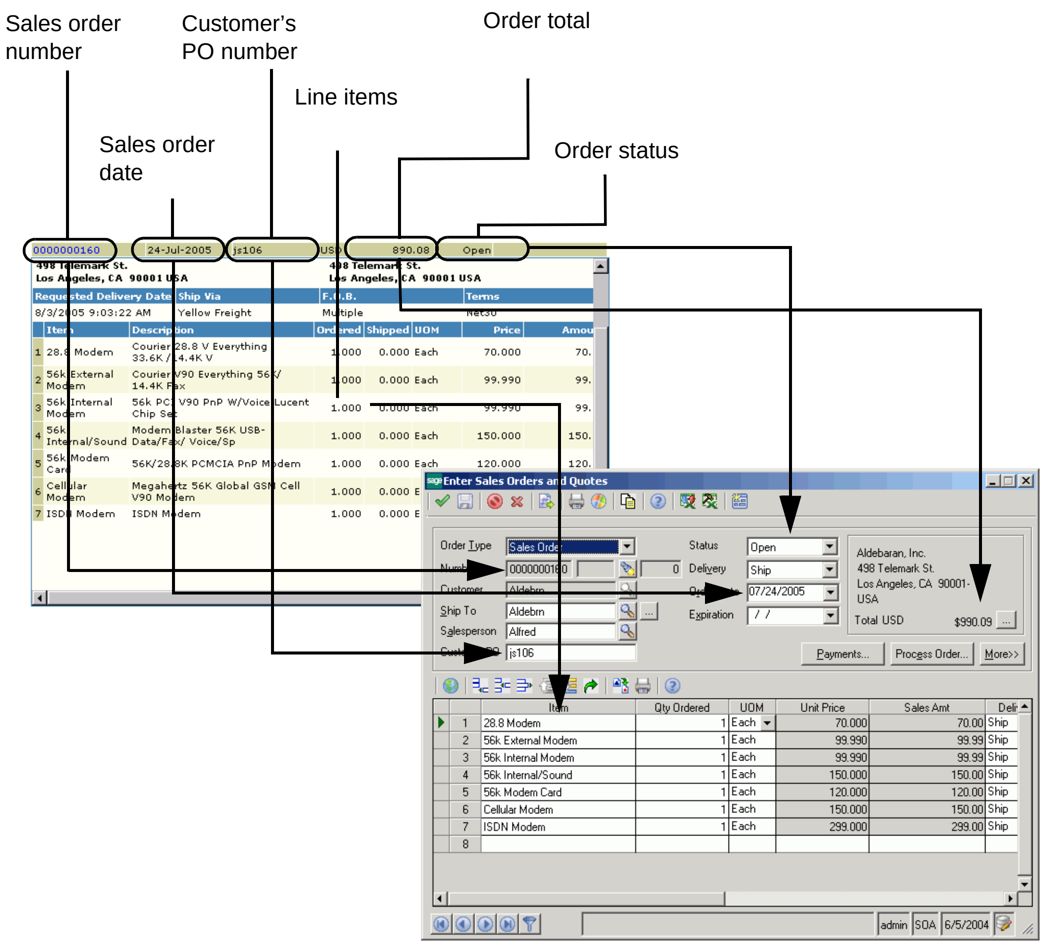
Introduction

When a customer creates an order in the Web site, it updates the application database and appears in Sales Order. This section provides an overview of how orders are processed from the Web site. For more information about processing sales orders, see the *Sales Order* guide.

Viewing Web orders as sales orders

Orders from the Web site become sales orders in Sales Order. In Sales Order, you can open, view, edit, and process sales orders that came from the Web site.

The following figure shows how information from a Web-based order, as indicated on the Order Inquiry page, appears when you retrieve the order in Sales Order.


Sales order number
Customer's PO number
Order total
Line items
Sales order date
Order status
Enter Sales Orders and Quotes

Order fulfillment

Once the order is entered into Sage MAS 500 from the Web site, it follows the same order fulfillment process as any sales order. This includes acknowledgement, picking, shipping, and invoicing. See the *Sales Order* guide for more information.

As the order is processed in Sales Order, the changes are reflected on the Order Inquiry page. The order status on the inquiry is reported as Open from the time it is received as an unacknowledged sales order to when it is closed.

Closed orders

When you close an order from Sales Order, the order no longer appears on the Order Inquiry page of the Web site.

Cancelled orders

Orders cannot be cancelled from the Web site. Customers need to contact you to have orders cancelled from Sales Order. When you cancel an order, it is removed from the Order Inquiry page.

eSalesforce Features

Overview

Introduction

eSalesforce enables salespeople to manage their customers from any system through their Web browser. This enables salespeople to retrieve customer information while they are at the customer's site and place orders for that customer through the eCustomer Web site.

Main features

eSalesforce includes the following main features:

- Integration between Sage MAS 500 and SalesLogix. This enables information about potential and current customers in SalesLogix to be linked with transaction information in Sage MAS 500.
- A Web site for searching and retrieving customer information. Like the Web site in eCustomer, you can customize the eSalesforce Web site to match your company colors and add other information.

This section explains the different parts of eSalesforce.

SalesLogix Integration

Overview of integration

SalesLogix includes information such as leads, prospects for orders, contacts, and communications with the customer. eSalesforce links the customer information in SalesLogix with the sales orders, invoices, and payments recorded in Sage MAS 500.

eSalesforce integrates the information in the following ways:

- An integration applications programming interface (API)
- The eSalesforce Web site

Integration API

The integration API transfers the following information from MAS 500 to SalesLogix:

- Customer information, including customer classifications, salespeople, territories, credit limits, and terms codes. This information is transferred to the prospect tables in SalesLogix.
- Product information, including item codes, descriptions, and standard pricing. This information is transferred to the prospect and opportunity tables in SalesLogix.

The integration API uploads information in the Sage MAS 500 databases and exports it to the SalesLogix database. You can control the frequency and time when the information is uploaded as shown in Chapter 6, *Configuring the System for eSalesforce*.

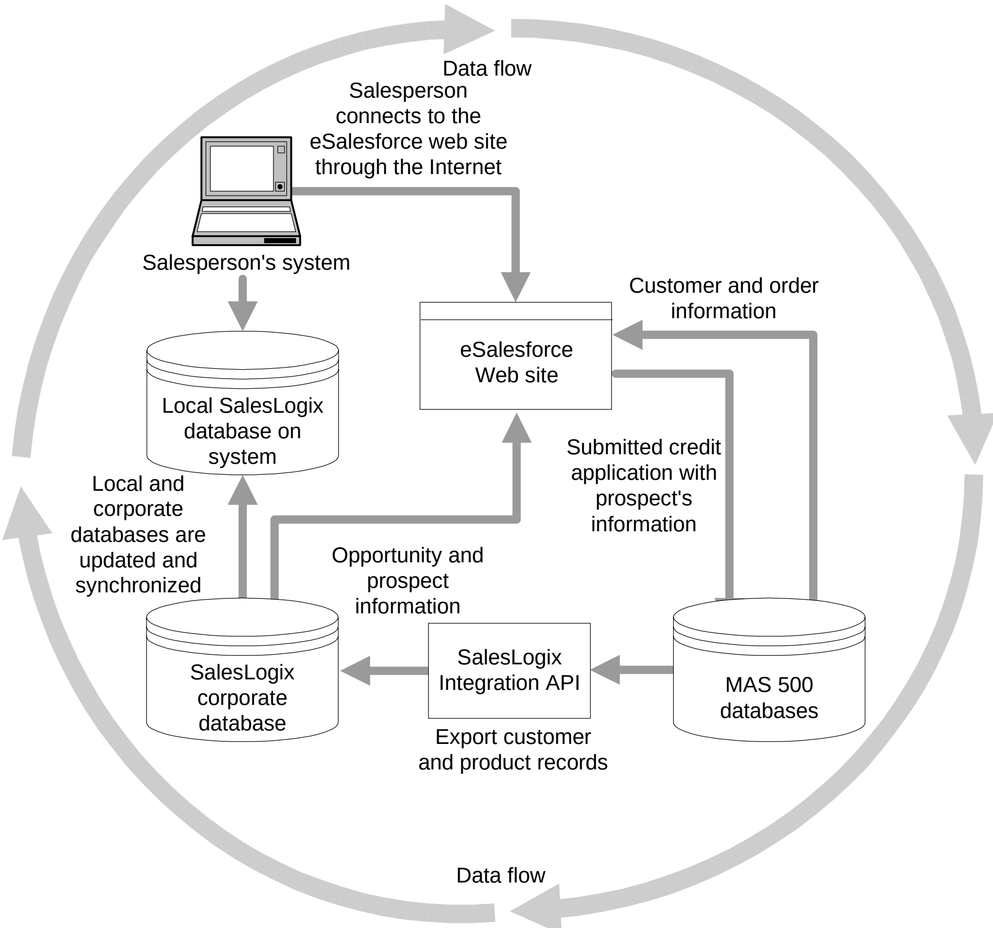
eSalesforce Web site integration

The eSalesforce Web site provides a unified view of the information, drawing together information from Sage MAS 500 and SalesLogix and showing the information that the salesperson requests. The salesperson does not have to remember to look at one system or the other to find the needed information.

The Web site also moves information from SalesLogix to Sage MAS 500. When you create a new customer through the eSalesforce Web site, it takes the prospect information from SalesLogix and uses it to fill in a credit application form. When the credit application is approved, the prospect information is used in the customer record created in Sage MAS 500.

Flow of information

The following chart shows how data flows through the eSalesforce system from the salesperson's system, the eSalesforce Web site, and the Sage MAS 500 and SalesLogix.



Connections with MAS 500

Only one Sage MAS 500 company can be integrated to the SalesLogix database. You can change to another SalesLogix database by undoing SalesLogix integration and then reestablishing it with the same company. For more information, see *Undoing SalesLogix Integration* on page 151.

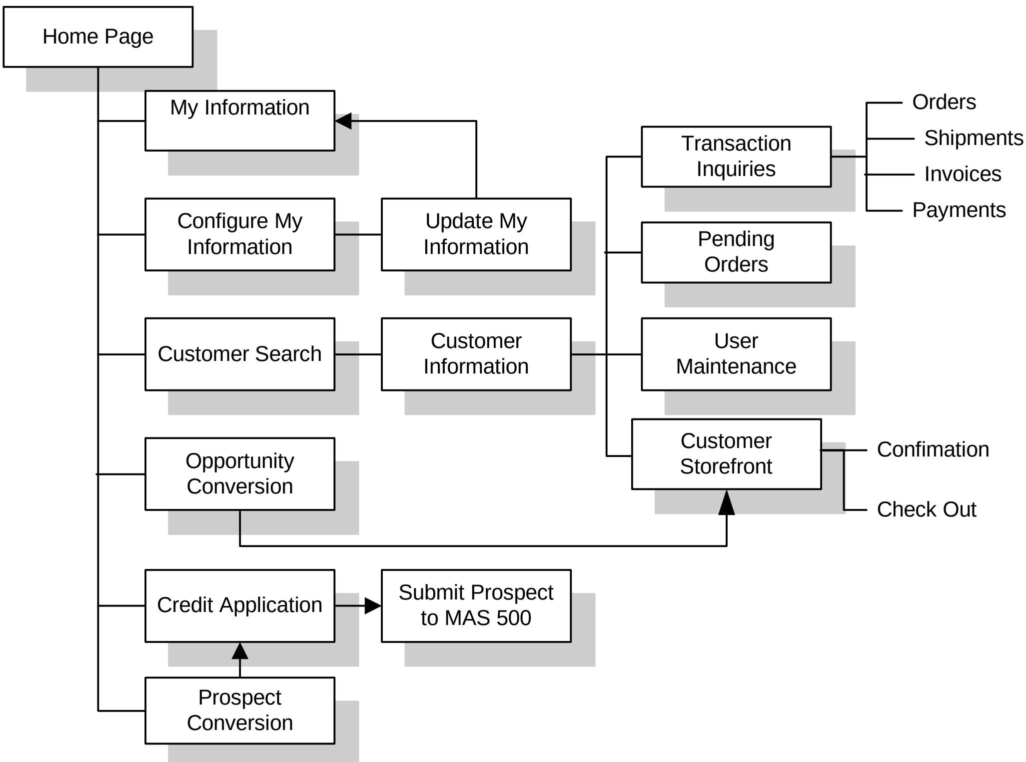
eSalesforce Web Site

Introduction

The eSalesforce Web site is designed to be used by your salespeople as an interface to Sage MAS 500 and SalesLogix. It gathers information from Sage MAS 500 and SalesLogix, generates credit applications with contact information from SalesLogix that becomes customers in Sage MAS 500, and provides links to eCustomer for placing sales orders. (For more information, see *Using eSalesforce with eCustomer* on page 16.)

Site structure

The basic eSalesforce Web site has the following structure:



Supported customization

You can customize the eSalesforce site to use your company colors and formats. End users can also customize information that appears on the My Information page.

Using eSalesforce in the Sales Cycle

Introduction

Salespeople use the different pages of eSalesforce at different stages of the sales cycle. They can use pages to convert leads into customers and generate orders. These features are described in this section.

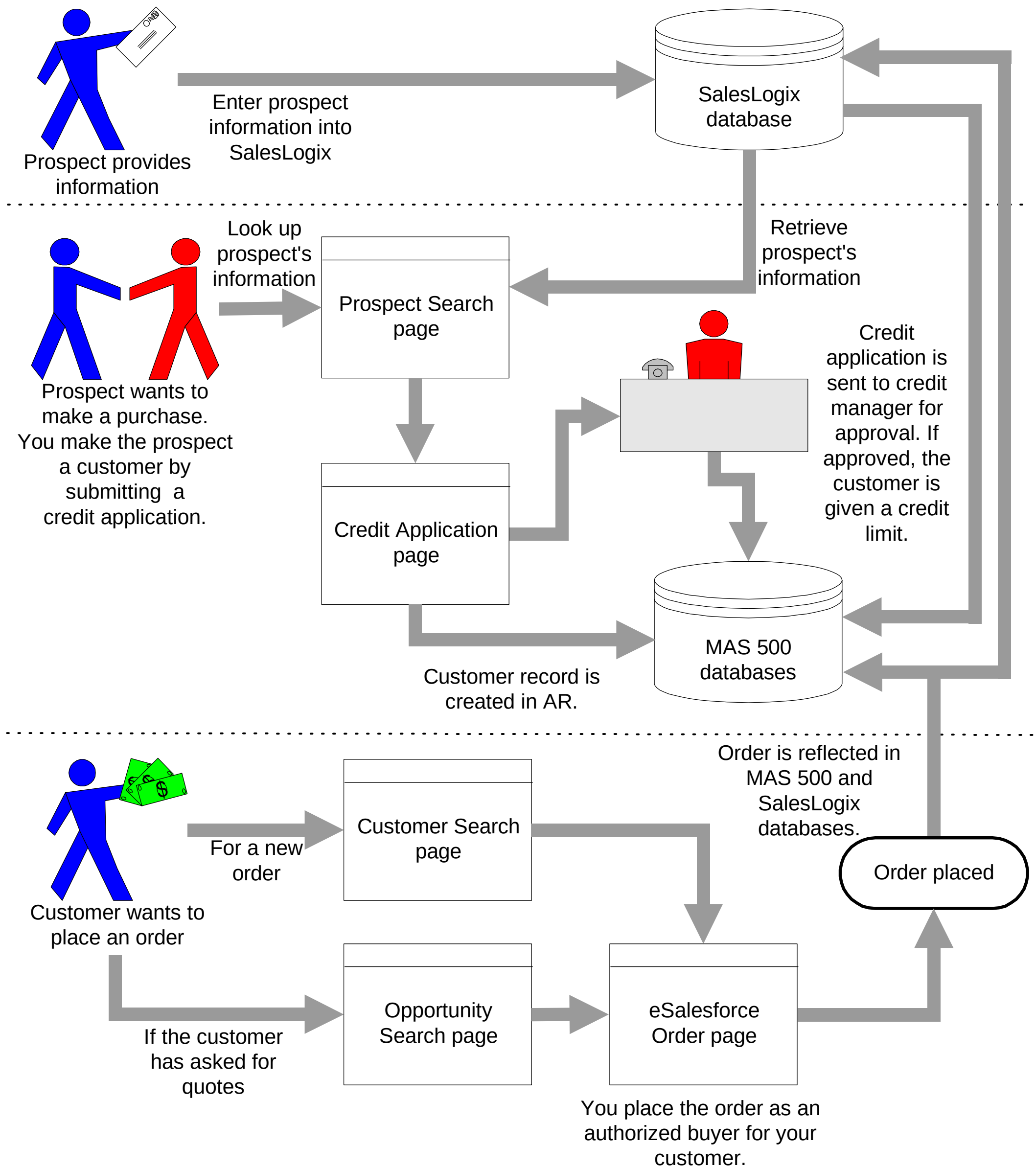
Terminology

eSalesforce uses the following terminology to describe the parts of the sales process:

Term	Description
Prospect	A person or company that could potentially buy products from you. You track prospects in SalesLogix.
Customer	A person or company who is ready to order or has already placed an order. A customer record is set up in Sage MAS 500 that enables that person or company to place orders.
Opportunity	A group of products and services that a customer may buy. You set up and track opportunities in SalesLogix using inventory and non-inventory items and standard pricing transferred from Sage MAS 500.

Overview of process

The following figure shows the sales process.



Using eSalesforce with eCustomer

Introduction

Use eSalesforce with eCustomer to enable salespeople to place orders for the customer.

Process of using the modules together

Salespeople use the combined modules as follows:

1. When customers want to place an order, salespeople look up the customer information on the eSalesforce Web site as follows:
   - If an opportunity already exists for this customer, they use the Opportunity Search page.
   - Otherwise, they use the Customer Search page.
2. From the search page, they launch eCustomer. They are logged into your company eCustomer site as an authorized buyer for that customer.

   If a salesperson launches eCustomer from the Opportunity Search page, the order is filled with the items from the selected opportunity. The items come from Sage MAS 500.

eExecutive Features

Overview

Introduction

eExecutive includes a series of components (called Web Parts) that generate summary information and charts from your financial information. The Web Parts appear in the user's Web browser and can be customized.

This section describes information about eExecutive related to its installation and configuration. For information about using eExecutive, see the *eExecutive* guide or online help.

Operation of eExecutive

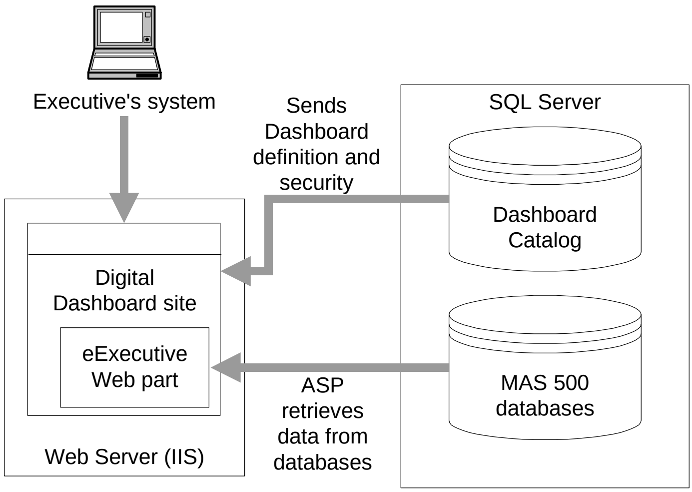
Overview

eExecutive includes a series of Active Server Pages (ASP), called Web Parts, that draw information from the Sage MAS 500 databases. The pages are arranged in a master window using Microsoft Digital Dashboard. Digital Dashboard enables users to arrange Web Parts and add content from a variety of sources, including external Web sites and Outlook windows.

The pages are installed on a Web server. Users connect to the pages through a Web browser. Digital Dashboard renders the pages according to the options that the user selects. The options are stored in a SQL Server database called a Dashboard Catalog.

Flow chart

The following figure shows how the Digital Dashboard and eExecutive work:



Updates

The data that appears in the eExecutive site is updated according to the schedule you set in Set Up CI Options. You can also generate manual updates. For information, see *Setting Site Options in Sage MAS 500* on page 78.

Installation of eExecutive

Where eExecutive is installed

eExecutive is installed as an IIS application on the same Web server as the other Internet Applications.

Requirement for Digital Dashboard

IIS must have Digital Dashboard installed on it. To install Digital Dashboard, see *Installing and Configuring Digital Dashboard* on page 48.

Security

eExecutive requires Windows authentication. It cannot be configured for anonymous access. For more information, see *Security* on page 28.

eTimesheets Features

Overview

Introduction

eTimesheets offers rapid and timely access to timesheet entry, expense claim entry, approvals, and project manager functions. The integration between the Sage MAS 500 Project Accounting module and eTimesheets provides consistently up-to-date project information.

This section provides procedures for launching and setting up eTimesheets. For information on performing routine eTimesheets tasks, see the eTimesheets Help.

Main features

eTimesheets is a time and expense application for remote workforces. eTimesheets includes the following main features:

- Enter time and expenses remotely over the Internet against a project set up in Project Accounting.
- Used in conjunction with Project Accounting, quickly update time on projects, as well as expenses that are incurred as a result of working with a project.
- Set up alerts to warn project managers when parameters have been met or surpassed.

Create user-defined timesheet periods.

Setting up resources

Before you can use eTimesheets, you must set up the resources that will use eTimesheets. Resources are created in the Maintain Resources window in Project Accounting. You will probably set up this information only once, but may refer to this section to make changes or add new eTimesheets users. For more information, see the Project Accounting Help. For information about configuring and launching eTimesheets, see *eTimesheets Configuration* on page 83.

Site Hosting and Configuration 2

This chapter describes hosting and configuration issues to consider when setting up your Web sites. Each Internet Application has different requirements, so you need to configure the sites for the appropriate level of security. The server where the Web sites are hosted need access to the Sage MAS 500 server, so you need to configure the necessary components to enable the Web sites to communicate with the Sage MAS 500 databases.

In this chapter

Information Processing

Overview

Introduction

This section provides examples of how information is processed by the Internet Applications and Microsoft Web components. An understanding of this information will help you to plan your Web sites.

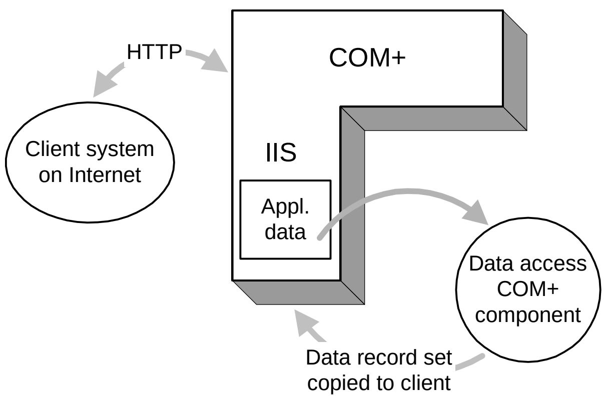
Internet Application Processing

Introduction

When customers connect to the Internet Applications Web sites, they interface with IIS and COM+ applications. The COM+ applications perform data retrieval and update tasks.

Data inquiries

When a user requests information on the Web site, such as an order inquiry or to see what merchandise is available, the request is sent through HTTP to IIS. A COM+ application for data access retrieves a disconnected set of tabular data and copies it to the user's client system.



eCustomer processing

eCustomer uses queued processing. When a customer places an order from the eCustomer web site, it is put into a queue to be added to the database as soon as it is available. This type of processing benefits the user in the following ways:

- The customer does not need to wait until the database is updated to continue using the Web site.
- If the connection to the application database is down, the request is not lost. The request remains in the queue and is processed on the database when the server becomes available.

When a request is made from the eCustomer Web site, two queued COM+ applications are used. These components are part of MSMQ:

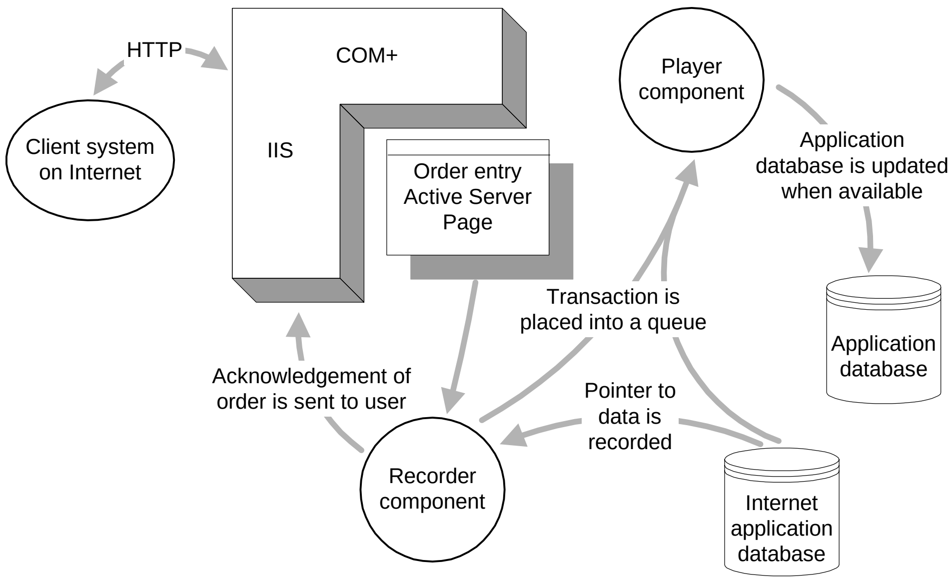
- Recorder: Packages the order into a request to update the database.
- Player: Sends the information to the server to update the database.

For example, when the customer places an order on the eCustomer Web site, the following happens:

1. The recorder does the following:
   - Draws information from the Internet application database to package a transaction to update the application.
   - Sends a message back to the customer acknowledging the order.
2. The package is then put in a queue to be sent to the application database.
3. Depending on the availability of the application, either of the following happens:
   - If the application database is available, the transaction updates the application database immediately.

- If the COM+ application cannot connect to the application database, the transaction remains in the queue until the application database can be updated.

The following chart shows how the process works.



After the order enters Sage MAS 500, it is processed as if it were entered directly in Sales Order. For more information, see *Internal Hosting* on page 25.

eSalesforce and eExecutive

eSalesforce and eExecutive use scheduled SQL Server tasks to update data. For information, see *Setting SQL Server Schedules* on page 79.

eTimesheets

eTimesheets communicates with the database through a Java application using XML.

Site Hosting Options

Overview

Introduction

The Internet Applications are flexible enough to work with your current Web hosting system and preferred method of security. This section describes options for hosting and security.

You can place the Web site on an intranet, an internal Web server, or a separate Internet service provider (ISP). This section explains how to configure the Internet Applications for different types of hosting.

Internal Hosting

Introduction

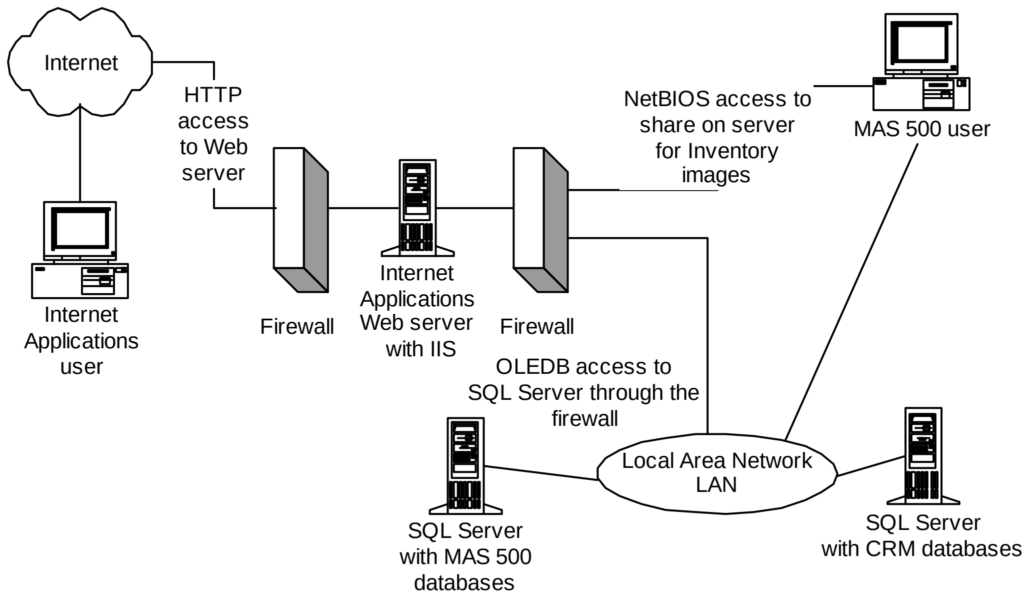
If your company does its own Web hosting (either on-site or in a co-location), you install the Internet Applications on your Web server. You then surround the Web server with firewalls (one to protect it from the outside and the other to limit access by internal users).

NetBIOS connection requirement

In order to install the Internet Applications Web components on the Web server, you need to have local access on your system to the system's local drives through NetBIOS. You also need NetBIOS access to the shared folder for inventory images.

Sample site configuration

The following figure shows an example of an internal hosting setup.



Hosting Through an ISP

Introduction

The Internet Applications can also be hosted by an external ISP.

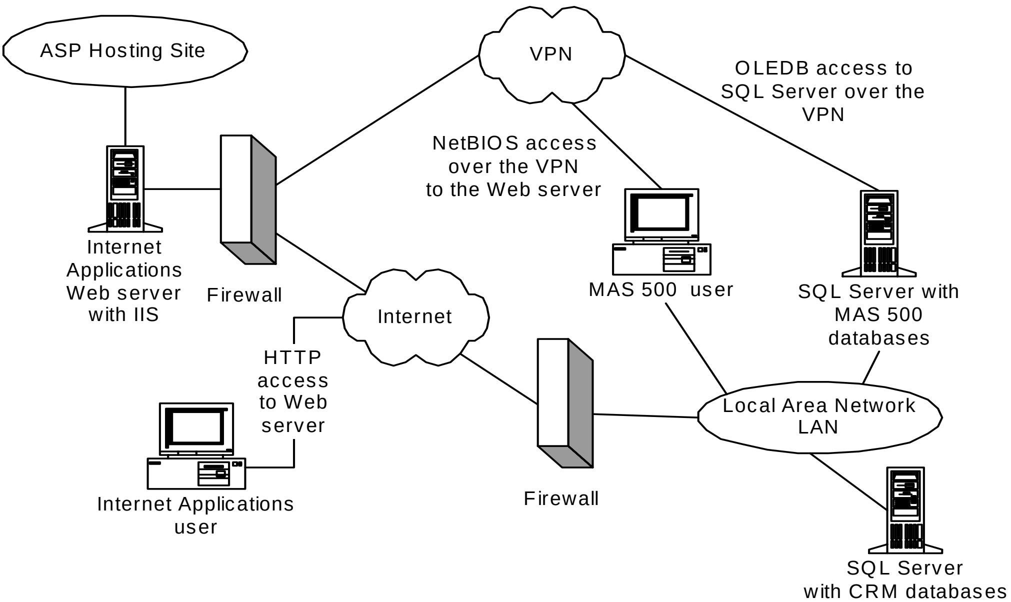
NetBIOS connection requirement

As with the internal Web server, you need to have direct access to the Web server's local C drive through NetBIOS to install the eCustomer Web components. You also need NetBIOS access to the folder used for inventory images for eCustomer.

The ISP can grant you access through a virtual private network (VPN) to communicate to the Web server. If the ISP does not have a VPN available, you will need to either go to the physical server and install it directly or send the Internet Applications installation CD-ROM to the ISP and have them install it for you.

Sample configuration

The following figure shows an example of a hosted setup.



Security

Overview

Introduction

To protect your data and control access, Internet Applications work with security provided with Sage MAS 500, IIS, and the COM+ applications.

This section describes features and issues that you should consider in setting up security for your site. For more information, see the Microsoft IIS and COM+ documentation or the Microsoft Web site at www.microsoft.com. If you have concerns about setting up security yourself, work with your ISP or a consultant to set up the best security for your site.

General Security Considerations

Public and private site considerations

The amount of security you set for a Web site depends on whether the site should be public or private. For private sites, configure them for high security. For public sites, you must balance the need for security with the need to make your Web site accessible. Some forms of security can make it difficult for legitimate users to enter and discourage them from visiting your site.

Web Site	Recommended type of site	Security issues
eCustomer	Public	Anonymous access can be used for greater access Secure administrative folders to prevent public access
eSalesforce	Private	Anonymous access not recommended

Web Site	Recommended type of site	Security issues
eExecutive	Private	Windows authentication required Cannot use anonymous access
eTimesheets	Private	Requires anonymous access

Controlling access to the Web site and data

To gain access to portions of the Web site and data, users need to be authenticated either by having them enter a login name and password or by using logins set up in the system.

This section explains how security and logins work. For more information, see *Configuring the Web Site* on page 91.

Firewalls

Surround the Web server with two firewalls: one protecting the links from Internet and the other protecting links from internal users. The firewall on the internal link also protects your internal systems if someone manages to breach the external firewall. Configure the firewalls to allow access to port 80.

Firewalls are your first line of defense, but they should not be the only one. It is recommended that you configure the Web server to provide additional protection.

Access to the Web site

The Internet Application Web sites use IIS to grant access. The settings for each site are different:

- The eCustomer Web site uses an anonymous login because it is a site you want to make readily available to external customers. When users go to your Web site, they are not prompted to log in. They are authenticated automatically by the system using a system-generated login and password. (You can replace the system-generated login with a dedicated user login on the system.)

- The eSalesforce Web site uses Windows authentication to restrict access to salespeople on your domain who are configured to have access in Sage MAS 500.
- The eExecutive Web site uses Windows authentication. You need to configure the Web server to grant access to the Web site only to the users who need it.
- The eTimesheets Web site manages its own login information. To support this feature, you need to configure the Web server for anonymous access.

You can provide additional security through IIS by granting authenticated access to folders, the system, or the domain. If you use this feature, you also need to create a local account on the Web server with a user name and password for the system or domain; this account does not create the login for the Web site in Sage MAS 500. The authentication of folders in IIS requires that the Web site be on an NTFS volume.

You can also use the options provided with NTFS to provide additional access to your Web site. For example, you can set some folders as read-only to prevent them from being modified by unauthorized users. You can also limit access to some folders entirely to all but specific users.

Access to transaction processing

The eCustomer Web site uses Sage MAS 500 security to restrict access to the transaction portion of the Web site. The Web site has a login page where the user name and password are authenticated.

Users of the site are granted access either through Sage MAS 500 or through a page on the Web site available to administrators. For information, see Chapter 5, *Configuring the System for eCustomer*.

Access to COM+ applications

COM+ applications require a valid login by a user of either the Windows Server or the domain where it is located. A default COM+ login is created during installation. This login can be changed. For more information, see *Settings Generated Automatically by the Installation* on page 54.

Secure Socket Layers (SSL)

Introduction

You can use SSL with any of the security methods described in this section to add greater security to the Web site. Your customers will appreciate the protection SSL gives them as they send their sensitive information through your site.

How SSL works

SSL provides a secured communications channel. Data is encrypted while it is in transit. The data is decrypted when it reaches its destination, but it is also decrypted at routers and bridges that it stops at on the way.

Web sites with SSL are connected with HTTPS instead of HTTP. A padlock icon appears on the status bar of the browser window when a user visits a site with SSL.

SSL and certificates

In order to use SSL on a Web site, you need to set up a certificate for the Web server. Certificates grant further security by using keys to authenticate the transaction: your public key and the customer’s private key.

Certificates can be generated in the following ways:

- You can obtain certificates from a public certificate authority. These certificates are normally accepted automatically by external users.
- You can generate your own certificate using Windows certificate services. By default, these certificates are not trusted by external users. Users are prompted to accept the certificate each time they log into your site, but they have the option of installing the certificate so that they accept the certificate automatically.

See the IIS documentation for instructions on obtaining and installing certificates.

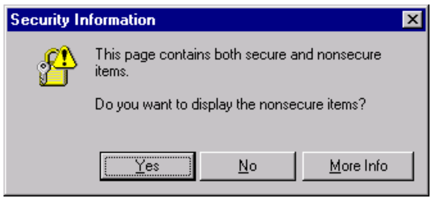
SSL options

Once you have set up a certificate for the server, you can select SSL options for the Web site.

One of the options you can use is 128-bit encryption. This offers a high level of security for data transmissions. Keep in the mind that if you use 128-bit encryption, the user of your site must have a 128-bit version of Internet Explorer, which is not available outside the United States. If you plan to support users from different countries, avoid using 128-bit encryption.

Effects of using graphics

If you use SSL with your Web site, it is recommended that you put all images of items on your Web server or on another server with SSL. If you have images on a server without SSL, the following message appears each time the user connects to your site:



The message indicates that there are elements on the page that are not secure. This does not affect the secure communications between the client system and your Web site. However, to avoid having the message appear whenever customers enter the site, put all images on your server.

Addresses of the Web Sites

Overview

Introduction

An address of a Web site is based on the IIS application name of the Internet Applications Web site. The Web sites are typically installed in subfolders of \Inetpub\wwwroot. When you access the pages from a browser, you replace \Inetpub\wwwroot with the domain name of the Web server.

eExecutive is launched from Digital Dashboard. Open Digital Dashboard from its URL and then open the eExecutive dashboard from the Digital Dashboard.

This section describes how the addresses are determined, so that you can determine what URL you want for the Web sites.

IIS Folder Names

Default IIS application names

The default IIS folder names for the Internet Applications are as follows:

Application	Default Folder
eCustomer	eCustomer
eSalesforce	eSalesforce
eTimesheets	eTimesheets

Location of files

By default, files for an Internet Application are installed into a folder based on the IIS application name. If you used eCustomer as the IIS application name for eCustomer, the files are installed into C:\inetpub\wwwroot\eCustomer. You can have the files installed into a different folder by using Custom installation. (See *Installing the Software* on page 57 for information.)

Changes on upgrades

If you are upgrading from a previous version of the Internet Applications that used the default folder names, the old folders and IIS application names are deleted and new ones are created with the new default names. Be sure to inform your users of the changes and have them update their bookmarks.

Determining the URL

Domain and folder names

The URL for an Internet Application is the following format:

http://WebServer/ApplicationName

Where *WebServer* is the Web server domain name and *ApplicationName* is the name of the IIS application name.

For example, if the domain of the Web server is www.mycompany.com, and you used the default IIS application name, eCustomer, the eCustomer URL is:

http://www.mycompany.com/eCustomer

Typing this URL opens the default page of the Web site after you finish configuring the Web site.

Using different folder names

During installation, you can select a different IIS application name. If you are running a publicly accessible site, you might choose a more descriptive name than the default.

Suppose you want to use the following URL:

http://www.mycompany.com/weborder

In the Installation wizard, enter weborder as the IIS application name for the Web site.

Changing the computer name

Use caution when changing the name of the Web server name. After renaming the Web server, edit the anonymous logon account for the Internet Information Server. Then change the logon to a valid domain and user account.

Preparing for Installation 3

This section covers prerequisite steps and information that you need before you start installing the Internet Applications. This information affects how the Web site operates, so read this information carefully before installing the Web components.

In this chapter

System Requirements

Overview

Introduction

To ensure a smooth installation, make sure that the servers and workstations you plan to use with the Internet Applications meet the system requirements shown in this section.

Overall System Requirements

Compatibility and Resource Guide

Read the *Sage MAS 500 Compatibility and Resource Guide* for information about system requirements, supported platforms, and recommended configurations. View the document on the Sage Software Web site at this address:

http://support.bestsoftwareinc.com/mas500/support/documents/compatibility.htm

SalesLogix Requirements

Supported versions

eSalesforce supports SalesLogix version 6.1 only with Web and 32-bit clients.

eCustomer Requirements

Required software

To set up customers in eCustomer, one of the following is required:

- eOrder
- eSalesforce
- Sage MAS 500 Inventory Management and Sales Order

eExecutive Requirements

Required software

Before installing eExecutive, install Microsoft SQL Server Digital Dashboard on the Web server. See *Installing and Configuring Digital Dashboard* on page 48 for more information.

eTimesheets Requirements

Required software

Before installing eTimesheets, install Project Accounting and the eTimesheets database as part of the standard Sage MAS 500 client and database installation. See the *Installation and System Configuration* guide.

Upgrade requirements

You can upgrade to eTimesheets only from the version included with Sage MAS 500 v6.1 to v6.3.

Case Sensitivity

Description

This version of Sage MAS 500 supports case-insensitive SQL Servers only. To upgrade from a case-sensitive server, see your authorized reseller for assistance.

Administrator Requirements

Accounts that need administrator access

Before installing the software, you need to be logged onto the Web server as a local administrator. You also need to make sure that the following user accounts on the server where the Web components will be installed are also configured as administrators:

- IUSR_*computername*
- IWAM_*computername*

With *computername* as the physical name of the computer. If the name of the computer is WEBSERV1, these accounts would be called IUSR_WEBSERV1 and IWAM_WEBSERV1.

Checking the settings

Follow these steps to check the settings:

1. From the Windows Start menu, select Programs, Administrative Tools, and Computer Management.
2. In the Tree pane of the Computer Management window, click Local Users and Groups.
3. In the Computer Management window, click Users. A list of user accounts appears. Widen the column if needed to view the entire name.
4. Right-click on IUSR_*computername*. From the menu that appears, select Properties.
5. In the Properties window, click the Member Of tab. Do the following:
   - In the Member Of box, click Guest, and then click Remove.
   - Click Add. From the window that appears, select Administrators and then click Add. Click OK to close the window.
6. Click OK to close the Properties window.
7. Repeat steps 4 through 6 for IWAM_*computername*.

Installing Required Software

Overview

Introduction

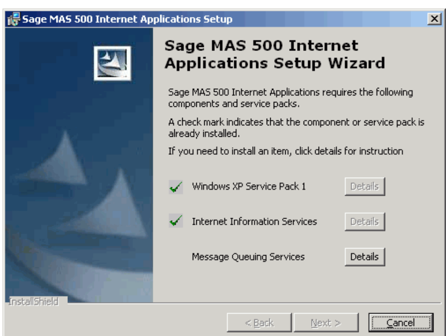
Before installing the Internet Applications, you need to install the software as shown in following sections:

This section covers issues you need to know when installing this software for use with the Internet Applications. See the applicable installation documentation for more information about installing these products.

Installing MSMQ

Introduction

You need to have MSMQ on the Web server before you can install the Internet Applications. If MSMQ is not on the Web server, the following message appears when you start the Internet Applications installation:

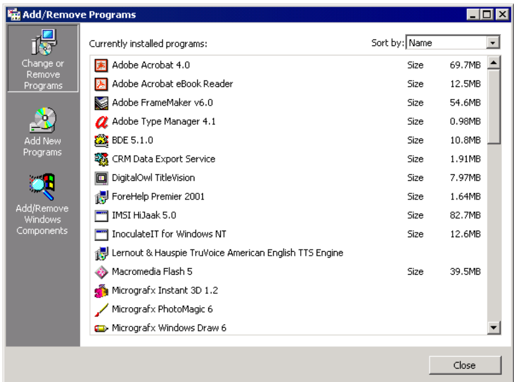


Click OK to end the installation, and then install MSMQ.

Procedure

Follow these steps to install MSMQ:

1. From the Windows Start menu, select Settings, and then Control Panel.
2. In the Control Panel window, open Add/Remove Programs.



3. In the Add/Remove Programs window, click Add/Remove Windows Components. The Windows Component wizard window opens.

4. Scroll down the list of component to Message Queuing Services. Put a check in the box. Click Next to continue.
5. As you run the wizard, use the default settings and note the following:

- Put a check in the box to install Message Queuing Server.
- Do not check the boxes for Enable routing and Manually select access mode to Active Directory.
- Select Message Queuing instead of accessing a directory service.

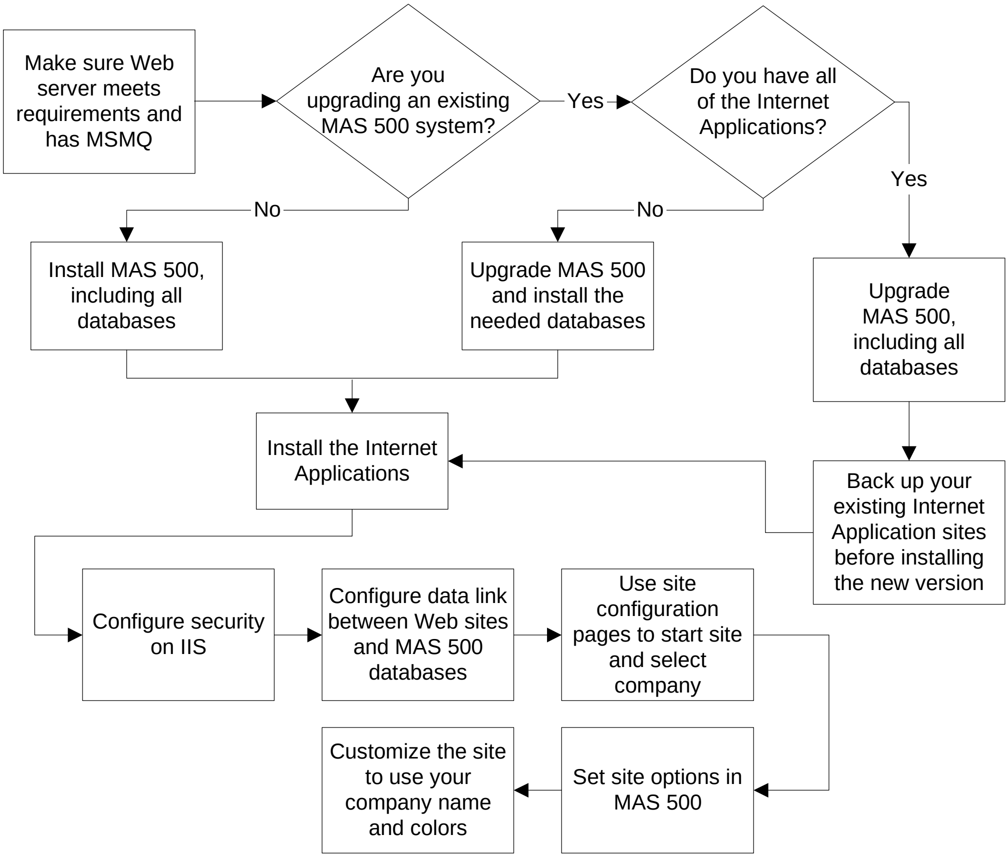
6. When you have selected your options, click Finish to add the components. Reboot the system, if directed.

Installing and Upgrading Sage MAS 500

General installation steps

Installing Sage MAS 500 and the Internet Applications consists of installing or upgrading Sage MAS 500, and installing and configuring the Internet Applications on the Web server. For complete installation instructions for Sage MAS 500, see the *Installation and System Configuration* guide.

The following chart shows an overview of the installation and configuration process.



Required tasks

Before installing the Internet Applications, install or upgrade Sage MAS 500. Follow the instructions in the *Installation and System Configuration* guide and be sure to do the following:

- For a new installation, install new system, application, and Internet application databases. For an existing installation, upgrade the current system and application databases to the new version and install an Internet application database on the same SQL Server.

- Install the Sage MAS 500 client software on at least one system. That system needs to have NetBIOS access to the shared folder for inventory images (see *Using the Folder for Item Images* on page 90 for information) either through the network or a VPN.

- Register and activate the applicable modules:

eCustomer	eSalesforce	eExecutive	eTimesheets
Accounts Receivable (AR)	Accounts Receivable (AR)	Accounts Receivable (AR)	Project Accounting (PA)
eCustomer (EC)	eSalesforce (SF)	Cash Management (CM)	eTimesheets (PT)
Sales Order (SO)	SalesLogix Link (SL)	eExecutive (EX)*	
Inventory Management (IM)		General Ledger (GL)	
		Inventory Management (IM)	
		Sales Order (SO)	

* Only eExecutive is required to be registered and activated. The other modules listed under eExecutive provide data for Web Parts. Activate only the modules you purchased. eExecutive Web Parts show data only for modules you registered and activated.

Note: There are no eCustomer, eSalesforce, eExecutive, and eTimesheets links in the Sage MAS 500 Desktop. These modules refer to the Web components and features in Sage MAS 500 modules to support the Web site.

- Make sure your sales order system is set up correctly. See the *Sales Order*, *Accounts Receivable*, and *Inventory Management* guides and online Help for information on which options need to be configured.

Security rights required

Users who administer and configure the Internet Applications need access rights to several tasks in Sage MAS 500. The following table lists the minimum access rights required for each of the Internet Applications.

Module	eCustomer	eSalesforce	eExecutive	eTimesheets
Common Information	CI External User List CI Maintain External Users CI Maintain Non-Stock Items CI Options Setup	CI Contact Maint CI Options Setup	CI Options Setup	
Accounts Receivable	AR Customer Maint	AR Customer Maint AR Salesperson Maint		
Inventory Management	IM Maintain Items IM Product Category List IM Set Up Product Categories			
Sales Order	SO Entry			
Project Accounting				All tasks

Installing or Upgrading SalesLogix

Introduction

Make sure that you have the version of the SalesLogix described in *SalesLogix Requirements* on page 38. If not, install or upgrade SalesLogix to the correct version and then set it up as shown in this section to use it with eSalesforce.

See the SalesLogix documentation for instructions on performing these tasks.

Required modules

The Administrative Workstation is required for all configurations of SalesLogix. Install the Administrative Workstation from the first SalesLogix CD-ROM.

To use the desktop version of SalesLogix, install Sales Network Client.

If you are using SalesLogix Web, install the Web Host and Web Manager.

Required tasks for all SalesLogix configurations

Perform the following tasks before using any configuration of SalesLogix with eSalesforce:

- Register SalesLogix. Sage MAS 500 cannot integrate with SalesLogix unless it is registered.
- Note where you install SalesLogix. If you do not install SalesLogix in the default folder indicated in the installation software, you will need to perform extra steps in setting up the bundles for SalesLogix integration. See *Integration Setup in SalesLogix* on page 130.
- Note the server port number and Read\Write password for the connection as you install the SalesLogix server. This information is needed when configuring the connection in Set Up CI Options. For information about the server port number and Read\Write password, see the *SalesLogix Implementation Guide*.

Required tasks for SalesLogix Web

If you are using SalesLogix Web, do the following in Internet Services Manager:

- If you plan to install the SalesLogix Web Host on the same Windows server as the Sage MAS 500 Internet Applications, create a separate Web site for the

SalesLogix Web applications. Do not install it in the Default Web Site, where the Sage MAS 500 Internet Applications are installed.

Use the SalesLogix Web Manager to install the SalesLogix Web Host in the desired location.

- Make sure the new Web site is configured correctly. Right-click on the Web site and select Properties. In the Properties window, make sure the HTTP Keep-Alives Enabled check box on the Web Site tab is not selected.
- The following virtual directories are set up for each Web host and virtual server: Scripts (containing slxweb.dll), Slxweb (containing HTML pages and JavaScript), Help, and Temp.
- Web Manager has been configured as follows:
  - You have set up an OLE DB provider for the SQL Server you are using for the SalesLogix database.
  - A Web profile has been set up.
  - A Web server has been set up with connection information to the database.

Installing and Configuring Digital Dashboard

Description

If you are installing eExecutive, you need to have either the Microsoft SQL Server Digital Dashboard or the SharePoint Portal Server installed on your Web server. The eExecutive installation software checks to see if these programs are installed and warns you if they are not.

If you do not have either of those programs, you can install the Microsoft SQL Server Digital Dashboard from the Sage MAS 500 Installation CD-ROM. If you want the SharePoint Portal Server, you can purchase it from Microsoft or an authorized reseller.

Installation

You can install the SQL Server Digital Dashboard from the Sage MAS 500 Installation CD-ROM in either of the following ways:

- If the Internet Applications installation wizard does not detect either SQL Server Digital Dashboard or the SharePoint Portal Server installed on your Web server, you are given the option of launching the SQL Server Digital Dashboard Setup program. See *Installing the Software* on page 57.
- You can start the SQL Server Digital Dashboard Setup program directly by following the procedure in this section.

Follow these steps:

1. Start the installation software as shown in the *Installation and System Configuration* guide. The installation window appears.
2. Click the link for SQL Digital Dashboard.
3. The SQL Server Digital Dashboard installation wizard starts. Follow the instructions on the screen to complete the wizard, and note the following:
   - When you are prompted if you want to create or select a database for storing dashboard configuration, create a new database or use a database that has been previously used for dashboard data. Do not use a Sage MAS 500 database.
   - The default Dashboard database is DAVCatalog.
   - If you use settings other than the defaults, make note of them.

Security

The Digital Dashboard and eExecutive Web site need to be configured for Windows authentication. See the Digital Dashboard documentation for more information.

Digital Dashboard and Web Parts configuration

After you have installed Digital Dashboard and the eExecutive Web Parts (described in Chapter 4, *Installing Internet Applications*), use the Administration pages to set Dashboard and Web Part properties. You can set the options to any that apply to your configuration.

Installing Internet Applications 4

This chapter shows you how to install the Internet Applications.

In this chapter

Web Component Installation

Overview

Introduction

Once the Web server is ready, run the installation wizard to install the Web components with the parameters you specify.

Methods of Installation

Description

You can install the Internet Applications using either of these methods:

- Express Installation: Installs the Internet Applications with the client software and default databases on a single computer. Express installation installs complete versions of all Internet Applications in their default settings. Use when the Internet Applications are part of a demonstration and training system.
- Internet Applications Installation wizard: Installs the Internet Applications alone. Use for installing a production system.

For information about which installation method to use, run the Installation Advisor from the Installation screen or see the *Installation and System Configuration* guide.

Pre-Installation Checklist

Introduction

Before you begin installing the Internet Applications, make sure you have the following information. See the indicated pages of the Internet Applications guide for details.

Checklist

Complete the following checklist:

Information		See
Applications to install	• All (Can use Complete installation) • eCustomer alone or with another application (Use Custom) • eSalesforce alone or with another application (Use Custom) • eExecutive alone or with another application (Use Custom) • eTimesheets alone or with another application (Use Custom) • Sage MAS 500 Remote Client alone or with another application (Use Custom)	Page 57
IIS application names	eCustomer: ___________________________ eSalesforce _____________________________ eTimesheets _____________________________	Page 34
Sage MAS 500 databases	_iapp) ___________________________ _app ___________________________ User name for databases ___________________________ Password for user _____________________________	Page 43

Settings Generated Automatically by the Installation

Description

This section describes the settings that are generated automatically by the Internet Applications installation. You can change these settings after the installation if needed. These include:

- Default Windows user for launching COM+ applications.
- Default data link user for linking Sage MAS 500 databases to the Internet Applications.

Default COM+ user

COM+ applications are usually in Interactive User mode, which means that they are not started until a user physically logs into the Windows Server where the Web server is located. To start COM+ applications automatically whenever the Windows 2000 Server is booted (whether or not someone logs in), the Internet Applications installation creates a default dedicated user login. You can use it or assign it to another user.

The default COM+ user created by the installation is MAS_500_USER and has a randomly generated password. If you want to change the COM+ user, see *Troubleshooting SalesLogix Integration* on page 168.

Default data link user

To link the databases to the Internet Applications, the installation creates a data link configuration file for each Internet Application. These files have .udl extensions.

The installation program also creates a default user on the SQL Server called IAppUser. This has a randomly generated password.

Assigning the COM+ user to the data link

The default COM+ user and default data link user created by the installation are separate and do not need to be connected.

If you want to create a trusted connection, you can assign the default COM+ user in the data link configuration file, but you need to grant the COM+ user access rights to the SQL Server. For instructions on doing this, see the Microsoft documentation.

Starting the Internet Applications Installation Wizard

Introduction

This section describes how to install the Internet Applications by using the Installation wizard.

Ways of starting the Installation wizard

To start the Internet Applications Installation wizard, do any one of the following:

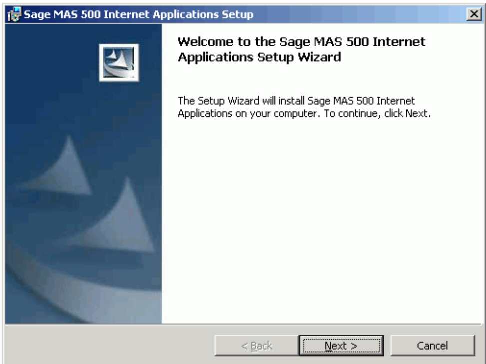
- Insert the Sage MAS 500 CD-ROM into the CD-ROM drive. From the installation window that appears, click Internet Applications.
- Use Windows Explorer to navigate to the InternetApps folder on the CD-ROM. Run Setup.exe.
- If you send the installation files to an ISP by FTP, have them copy all the files to the same folder. Then, have them run Setup.exe.

Use of Windows Installer

All Sage MAS 500 installation programs use Microsoft Windows Installer. The Web server should have Windows Installer from Windows 2000. If so, the installation program uses the version of Windows Installer that is already on the system. If not, the installation program installs it for use during installation. It may take a moment to install the software, and then the installation starts.

Installation Wizard opening screen

When the Internet Applications installation starts, the following window appears:



Uninstallation of Prior Versions

What gets removed

If you have an earlier version of the Web components on your system, the installation wizard detects it and prompts you to remove it before you install the new software. Removing an old version does the following:

Removed	Not Removed
All files that were installed. including HTML pages, graphics, scripts	Pages added to the site
Customized pages that have the same names as the original	Customized pages
COM+ applications and packages	Queues
Service packs and monthly updates added to the installation	
Folders and IIS applications that used the old name	

Click Remove to uninstall the old software. The wizard then starts the installation process.

> **Important:** The old folders and IIS application names are removed and new ones are created using either the new default names or the names you specified. For more information, see *IIS Folder Names* on page 33.

Installing the Software

Procedure

Click Next to start the installation and follow these steps:

1. Review the license agreement that appears on the screen. Then, select “I accept the terms in this license agreement” and click Next to continue.
2. When you are prompted to enter your information, the fields show the name and organization as recorded in the Windows Registry. You can change this information as desired and select whether the software is available to all users or just yourself. Click Next to continue.
3. You have the following setup options:
   - Complete: Installs all components into their default folders. (See *IIS Folder Names* on page 33 for information.) Use this option if you want to be sure you are installing all files and have sufficient space on drive C.
   - Custom: Enables you to select which components to install and the drive and folder where files will be installed. Use this option if you are limited on disk space or want more control over the installation. eCustomer and eSalesforce are installed in folders based on their IIS application name; eExecutive is installed in the eExecutive folder under the folder you selected.

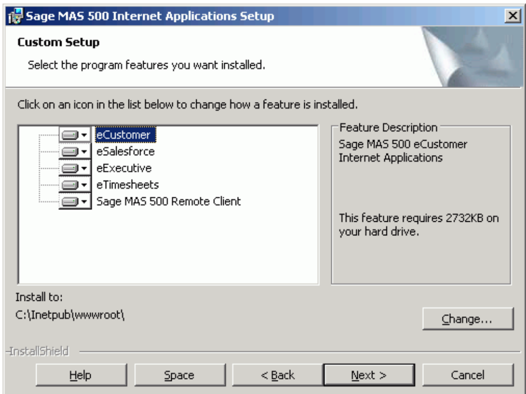
   Important: Use the Custom option if you do not want to install all of the Internet Applications or if the default installation is not an NTFS volume.

Installing the Internet Applications on an NTFS volume is not required, but it enables you to take full advantage of security features.

Select the option you want and click Next.

If you select Custom, go to the next step. If you select Complete, go to step 6.

4 If you select Custom, the following window appears:

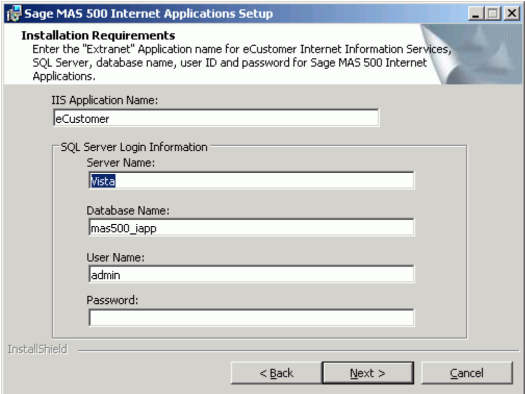


Complete the window as follows:

- By default, all Internet Applications are installed. If you do not want to install a module, click on it and select from the menu that appears “This feature will not be available.” To install the feature, select “This feature, and all subfeatures, will be installed on local hard drive.”
- To change the drive and path where the Internet Applications will be installed, click Change. Click Space to see how much space is available on your drives and how much space will be used by the database installation software. Note that some files will be installed on the local hard drive.

Click Next to continue.

5 If you are installing eCustomer, the following screen appears:

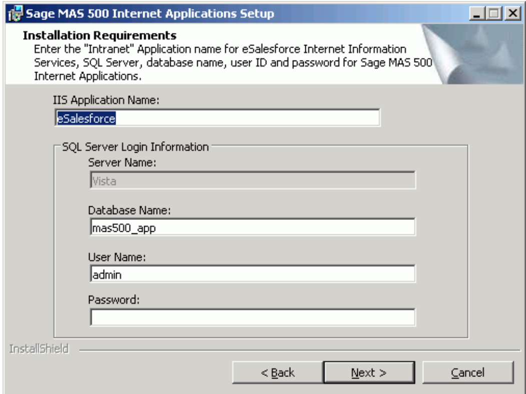


Enter the following for eCustomer:

- The IIS application name for eCustomer. This is used as the name of the folder where the Web components are installed and to identify the Web site in IIS, queues, and other places in the system.
- The name of the SQL Server and the Sage MAS 500 database you are using. Enter the name of the Internet Applications database (_iapp).
- A user name and password for that database.

Click Next to continue.

6 If you are installing eSalesforce, the following screen appears:



Enter the following for eSalesforce:

- The IIS application name for eSalesforce. This is used as the name of the folder where the Web components are installed and to identify the Web site in IIS, queues, and other places in the system.
- The SQL Server containing the Sage MAS 500 database you want to use. If you have already selected a server for eCustomer, it will appear in this field and must be used.
- The name of the application (_app) Sage MAS 500 database you are using. The database must be on the indicated or selected SQL Server.
- A user name and password for that database.

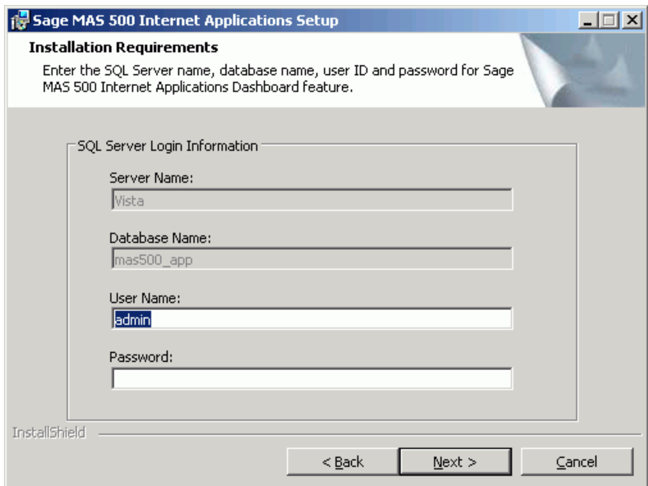
Click Next to continue.

7 If you are installing eExecutive, the Internet Applications installation wizard indicates if you do not have either SharePoint or SQL Server Digital Dashboard installed on the Web server. You have the option of starting the SQL Server Digital Dashboard Setup

program. Click Install to install the SQL Server Digital Dashboard or Next to continue installing Sage MAS 500 Internet Applications.

When you are finished installing the SQL Server Digital Dashboard, go back to the Internet Applications installation wizard.

8 If you are installing eExecutive, you are prompted to enter information for it. The following screen appears:



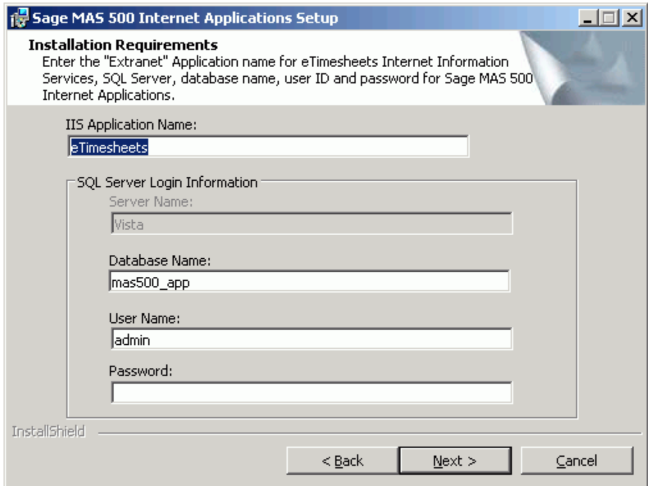
Enter the following for eExecutive:

- If you have not specified a SQL Server and Sage MAS 500 application (_app) database for the other Internet Applications, enter it. If you already selected a SQL Server and application database, it will be used by eExecutive.
- A user name and password for that database.

Note: eExecutive does not have an IIS application name.

Click Next to continue.

9 If you are installing eTimesheets, you are prompted to enter information for it. The following screen appears:



Enter the following for eTimesheets:

- The IIS application name for eTimesheets. This is used as the name of the folder where the Web components are installed and to identify the Web site in IIS, queues, and other places in the system.
- The SQL Server containing the Sage MAS 500 database you want to use. If you have already selected a server for other Internet Applications, it will appear in this field and must be used.
- The name of the application (_app, not the _pt eTimesheets database) Sage MAS 500 database you are using. The database must be on the indicated or selected SQL Server.
- A user name and password for that database.

Click Next to continue.

10 Click Install to install the software. A status bar indicates the progress. To cancel the installation, click Cancel.

Changing the Installation

Introduction

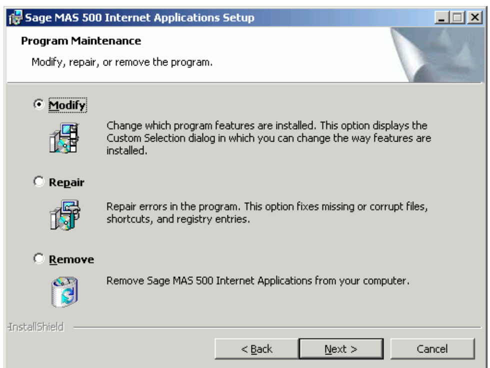
You can remove Web components, change the configuration, or reinstall components by running the Installation wizard. When you run the wizard on a system that already has the the Internet Applications installed, the wizard presents an appropriate set of options.

Procedure

Follow these steps to run the client installation to make changes:

1 Start the Installation wizard as shown in *Settings Generated Automatically by the Installation* on page 54. When the Installation wizard starts, click Next to continue.

2 The following window appears:



Note: Selecting Remove from this screen does not uninstall service packs, monthly updates, and hot fixes you added to the current version of the Web components. If you are running the installation wizard to update an older version, clicking the Remove button does remove those items.

Select the option you want:

- If you want to change the installation, select Modify.

- If you experienced problems with the software or need to repair a corrupted installation, select Repair. This reinstalls any missing or damaged files.
- If you want to uninstall the software from the system, select Remove.

3 A screen appears where you can confirm your action. Click Install (for Modify or Repair) or Remove to proceed.

Configuring Web Components

Overview

Introduction

You need to configure the Web components to connect to the Sage MAS 500 databases, set up the security you want, open the Web site, and set general options in Sage MAS 500.

Follow all of the procedures in this section in the order listed in the following sections:

Configuration after Express Installation

Description

If you used Express Installation to install the Internet Applications, follow the instructions in this section to configure them for use as a demonstration or training system.

For more information about Express Installation, see the *Installation and System Configuration* guide.

Additional steps after Express Installation

After installing the Internet Applications installed with express installation, do the following to use the system for demonstration and training.

1. Select the eCustomer company. From the Windows Start menu, select Programs, then Sage MAS 500, Internet Applications Utilities, and then eCustomer Site Maintenance. In the Store Maintenance page that appears, do the following:
   - In the Company field, select SOA.
   - In the Store Status field, select Open.
   - In the Sales Order Processing field, select Running.
   - Click Update to save the settings, and then close the window.
2. Verify that you can launch eCustomer. From the Windows Start menu, select Programs, then Sage MAS 500, and then eCustomer Home Page. In the eCustomer welcome page, do the following:
   - Click Login to go to the login page.
   - In the Name field, type customer.
   - In the Password filed, type demo01.
   - Click Login.
3. In Sage MAS 500, set up a salesperson to use eSalesforce. Do the following:
   - Set up the salesperson by using your Windows authenticated login to set yourself as a Sage MAS 500 user and make yourself a salesperson. Assign your login to company SOA. See *Setting Up Salespeople in Accounts Receivable* on page 142 for instructions.
   - Assign a customer to the salesperson. See *Creating Customers in Accounts Receivable* on page 147 for instructions.

4. Select the eSalesforce company to SOA. From the Windows Start menu, select Programs, then Sage MAS 500, Internet Applications Utilities, and then eSalesforce Site Maintenance. In the Web Site Maintenance page that appears, do the following:
   - In the Company field, select SOA.
   - Click Update and then close the window.
5. Start eSalesforce. Do the following:
   - Make sure you have logged into Windows using the integrated login you specified for the user. eSalesforce uses your Windows authenticated login to determine your access to eSalesforce.
   - From the Windows Start menu, select Programs, then Sage MAS 500, and then eSalesforce Home Page.

You are ready to start using eSalesforce and eCustomer for demonstration or training.

eExecutive Dashboard Import

Introduction

Complete the eExecutive installation by importing the eExecutive dashboard into Digital Dashboard. If you are using SharePoint Portal Server, you also provide a link to the dashboard.

Importing eExecutive dashboard

Follow these steps to import the eExecutive dashboard and set up the Web Parts:

1. Open Internet Explorer. In the Address line, type the following URL:

   http://*Server*/Dashboard

   Where *Server* is the name of the server where you installed the SQL Server Digital Dashboard.

2. From the Dashboard Welcome page, click Administration.

3 From the Administration dashboard that appears, go to the Dashboard View pane and expand the listing as follows:
   - Click the + to the left of DAVCatalog.
   - Click the + to the left of Dashboards.
   - Click Welcome to select it.
4 Click Import. A File Open dialog box appears. Do the following:
   - Change the Files of Type field to Dashboard (*.ddb).
   - Navigate to the folder where you installed the eExecutive software (normally C:\Program Files\Sage MAS 500 Internet Applications\Dashboard). The eExecutive dashboard file, eExecutive.ddb, should appear.·
   - Click Open. The entire eExecutive dashboard is imported.
5 Click Refresh on the browser window. The listing for Welcome in the Dashboard view includes eExecutive.
6 Click eExecutive in the Dashboard View pane and then scroll to the Web Part List pane immediately below it. The pane lists Web Parts in the eExecutive dashboard.

Setup procedure for SharePoint Portal Server

If you are using SharePoint Portal Server, create a link to the eExecutive dashboard that you created in the previous section. This link launches the eExecutive dashboard; it does not run it within SharePoint Portal Server.

Follow these steps:

1 From the Windows Start menu, select Programs, Administrative Tools, and then SharePoint Portal Server Administration Utility. Use the utility to create a workspace for the users.
2 Create a text file with some text. The content is not important, but it must have at least one character. Save the file and call it eExecutiveShortcut with no extension.

3 Open Internet Explorer. Navigate to the users' workspace you created with the SharePoint Portal Server Administration Utility.

4 From the SharePoint Portal toolbar, select Document Library. Expand the listing as follows:

- Under Documents, select Portal Context, and then Quick Links.
- Under Quick Links, select Add Document.

5 In the Document file name entry type:

path\eExecutiveShortcut

Where *path* is the folder where you created the eExecutiveShortcut text file. Click Continue.

6 On the Document Profile screen, do the following:

- Under Link, type the eExecutive URL.
- Under Title, type eExecutive.
- Click Save.

Setting Web Site Security

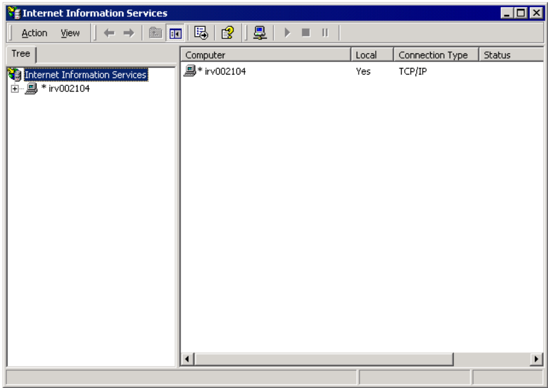
Introduction

Run the Internet Services Manager to check security and other Web site settings. You can use the standard security or add other levels of security. For more information, see *Security* on page 28.

Procedure

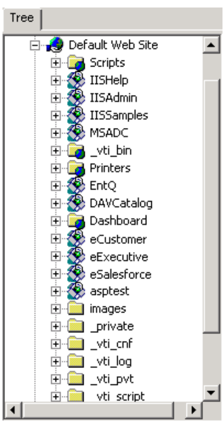
To set security options, do the following:

1. From the Windows Start menu, select Programs, Administrative Tools, and then Internet Services Manager. The following window appears:

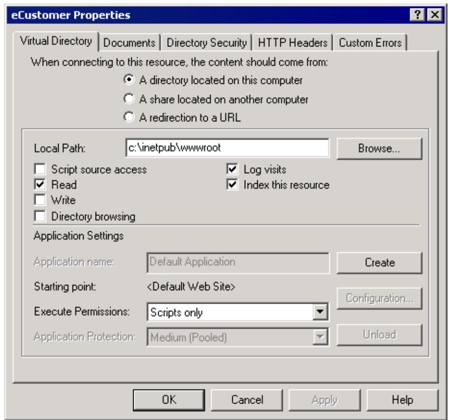


2. The Tree pane of the Internet Information Services window shows the name of the Web server. Expand the list for the Web server, and then the list for Default Web Site.

   The tree should look something like this:



3 Look for the name that you gave to the Web site and right-click on it. From the menu that appears, select Properties. The following window appears:

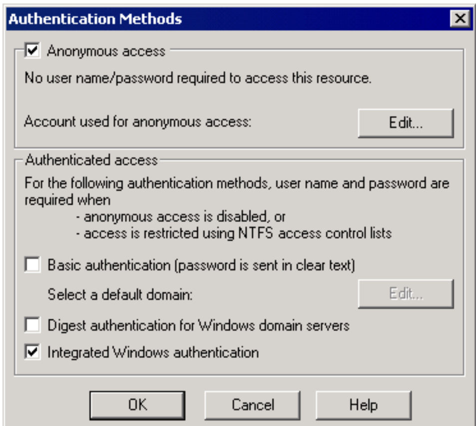


From this window, set the options you need for the site as shown in the following sections.

Setting up standard security

To use standard security, follow these steps in the Web site Properties window.

1. Click the Directory Security tab. Under "Anonymous access and authentication control," click Edit. The following window appears:



2. Depending on the Web site you are configuring, set the options as follows:
   - eCustomer: Put a check in the Anonymous access and Integrated Windows authentication boxes as shown.
   - eExecutive and eSalesforce: Clear the Anonymous access check box. Leave the Integrated Windows authentication box checked.
3. Click OK to accept the changes.

Setting up authenticated access

For additional security for the Web server, you can set up IIS to authenticate people using the site. Users first need to log into the Web server and then log into Web site. The logins are separate and unlinked. They can be different for the same customer. See the IIS documentation for instructions.

Securing Specific Pages and Folders

Introduction

To prevent pages and folders from being used by unauthorized people, apply security to them through IIS. If you installed the Web components on NTFS volume, you can limit access to specific users or groups using NTFS security permissions.

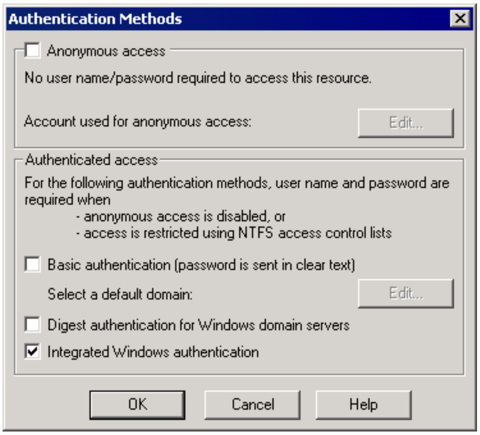
Setting authenticated access in IIS

The first step in securing pages is to require authenticated access. An external user must log in with a valid user name for the Web server or its domain to gain access to the files.

Follow the procedures in *Setting Web Site Security* on page 69 to run Internet Services Manager. Then, do the following:

1. In the Tree pane, expand the listing for the Web site. One of the folders in the listing is Administration. You can set security for an entire folder or individual files.
2. Right-click on the folder or the file, and from the menu that appears, select Properties.
3. In the Properties window that appears. Click the Directory Security tab. Under “Anonymous access and authentication control,” click Edit.

4 In the Authentication Methods window that appears, remove checks from all boxes, except Integrated Windows authentication, as shown in the following figure:



Note: If you are not using SSL, you will receive a warning that your password might be examined during authentication. Click Yes to continue.

5 By default, the system uses the local Windows domain where there Web server is located to authenticate. If you want to authenticate using another domain, click Edit. In the dialog box that appears, select the domain you want to use and click OK.

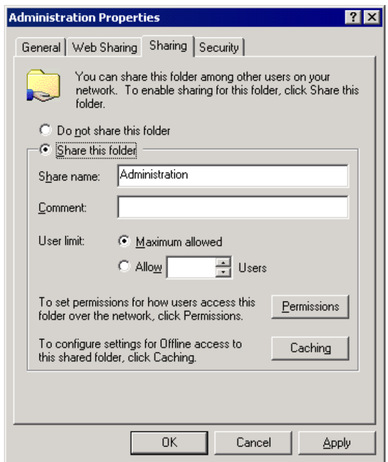
6 Click OK to close the Authentication Methods dialog box. Then close Internet Services Manager.

Limiting access to the file or folder

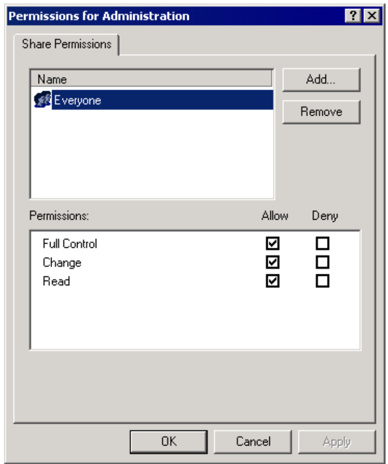
IIS only enables you to limit access to a folder or file to authenticated users of the Web server or domain. To restrict access to certain user groups, you need to set file sharing options in Windows Explorer. These options are available if you installed the Web components on an NTFS volume.

Follow these steps:

1. In Windows Explorer, navigate to the folder or files for which you want to control access.
2. Right-click on the folder or file. From the menu that appears, select Properties.
3. In the Properties window that appears, click the Sharing tab.
4. Select "Share this folder." You can then set options for controlling access.

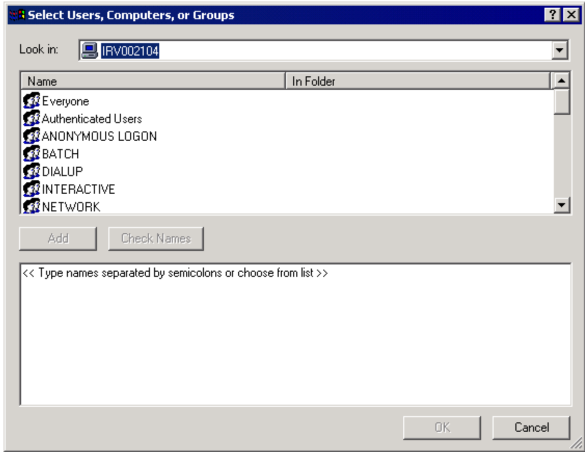


5 Click Permissions. The following window appears:



Select Everyone. In the Permissions box, put checks in the Deny column for all types of permissions.

6 Click Add. The following window appears:



Select the computer or domain in the “Look in” field, and then select the users or user groups to which you want to grant access and click Add. Click OK when you are finished.

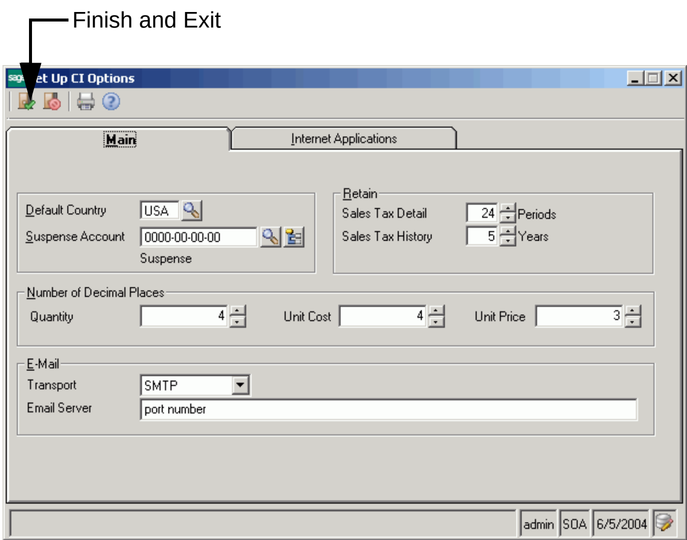
7 In the Permissions window, select the users or groups to which you want to grant access. Put checks in the Allow column for those users and groups. Click OK when you are finished.

Setting Site Options in Sage MAS 500

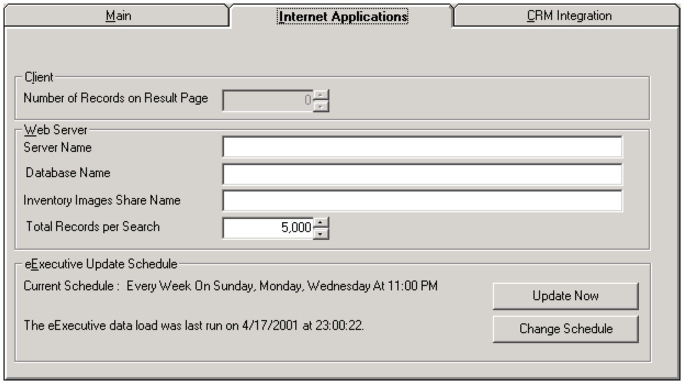
Procedure

Use the Common Information (CI) module for general settings for all Internet Applications. Follow these steps in Sage MAS 500:

1 In Common Information, select Maintenance, CI Setup, and then Set Up CI Options. The following window appears:



2 Click the Internet Applications tab. The following fields appear:



Complete the tab with the information for your configuration. See the online Help for more information.

Important: The Inventory Images Share Name is required and should refer to a folder available on the network. For more information, see *Using the Folder for Item Images* on page 90.

3 If you are using eExecutive, set the update schedule and make sure that the SQL Server Agent is running. See *Setting SQL Server Schedules* on page 79.

To update eExecutive data now, click Update Now.

4 When you are finished, click Finish and Exit.

Setting SQL Server Schedules

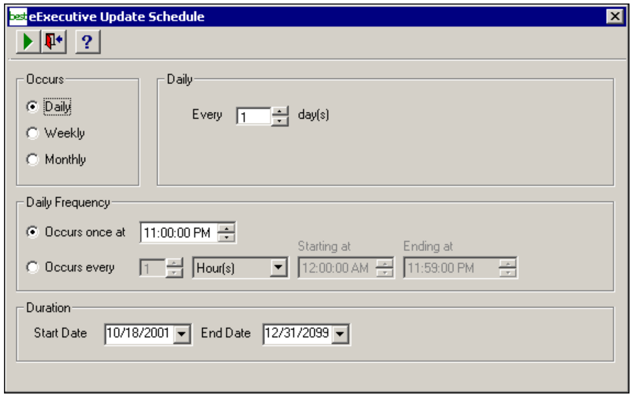
Introduction

For tasks where data from SQL Server databases, such as data for eExecutive web parts and SalesLogix integration (see *Integration Setup in Sage MAS 500* on page 132), you can set an update schedule so that the data is updated automatically at the intervals you set. For more information about SQL Server scheduling, see the *SQL Server Books Online*.

Procedure

Follow these steps to set the schedule:

1. Click Change Schedule from the tab that you are using. The following window appears:



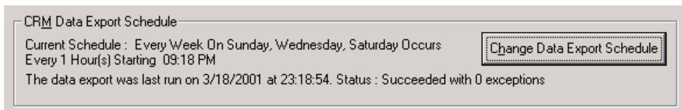
2. In the Occurs section, choose either of the following options. The section to the right of Occurs changes according to the option you select.
   - Daily: To pick a frequency of days, such as every day or every two days.
   - Weekly: To select a frequency of weeks and the days of the week that the export takes place, such as every two weeks on Monday, Wednesday, and Friday.
   - Monthly: To select a specific day in the month and an interval of months, such as the second day every three months or the third Sunday every month.
3. In the Daily Frequency section, select the time and frequency of the backup on the days you selected. Do either of the following:
   - To have the export performed only once, select “Occurs once at” and select the time.

- To have the export performed several times a day, select "Occurs every" and select the frequency and the period of time that the export occurs.

Note: For the purpose of scheduling, midnight is 12:00 A.M. and noon is 12:00 P.M. The day ends at 11:59 P.M.

4 In the Duration section, indicate the period that the task takes place. If you do not want to specify a limited time, leave the fields at their defaults of the current date as the start date and December 31, 2099 as the end date.

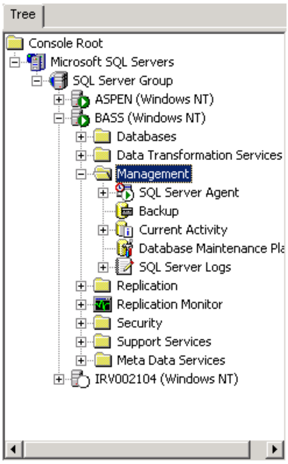
5 Click Update to accept the changes. The schedule portion of the tab indicates the new setting and the last time it was run, as in this example.



Running SQL Server Agent

To perform scheduled tasks, the SQL Server Agent must be running. Use SQL Server Enterprise Manager to do the following:

1. In the Tree pane, expand the listing of the SQL Server. Expand the Management folder to reveal SQL Server Agent as shown:



2. If a green arrow appears in the icon for SQL Server Agent, it is running. If there is a red square, you need to start the service. Right-click on the icon, and from the menu that appears, select Start.

If you need information about using SQL Server Agent automatically, see *SQL Server Books Online*.

Viewing the scheduled events

Data update tasks are added to the jobs for the SQL Server Agent. To view these tasks, use SQL Server Enterprise Manager.

eTimesheets Configuration

Introduction

Prepare eTimesheets for use by doing the following:

- Grant security rights for eTimesheets users.
- Configure SMTP for eTimesheets e-mail.

Granting access to eTimesheets users

In order for users to gain access rights to eTimesheets, configure settings in Project Accounting and then in eTimesheets. Do the following:

1. In Project Accounting, from the Maintenance menu, select Maintain Access Levels. See the online Help for instructions on granting access rights to timesheets.
2. Run eTimesheets. Grant access rights to the users as shown in the online Help.

   Important: Access settings in Project Accounting do not affect eTimesheets. Security must also be set in eTimesheets.

Description

To enable eTimesheets to use e-mail features, such as sending timesheets and expense reports by e-mail, install and configure SMTP on the Web server.

Follow the instructions in this section to set up SMTP for eTimesheets. You can skip this section if you do not plan to use the e-mail feature.

For instructions on using SMTP to distribute other Sage MAS 500 documents, see the *Cross-Module Utilities* guide and online Help.

Requirements

This feature requires the Web server to be on an NTFS drive. If it is on a drive with FAT32 system, you will not be able to grant the proper permissions and the e-mail will not be delivered.

Enabling SMTP procedure

Follow these steps to enable SMTP to be used for eTimesheets:

1. If SMTP is already installed on the Web server, skip to step 2. If not, install it as follows:
   - From the Windows Start menu, select Settings, then Control Panel, and then select Add/Remove Windows Components.
   - Click Add/Remove Windows Components.
   - In the Windows Components Wizard window, select Internet Information Services (IIS) and click Details.
   - Select SMTP Service and click OK.
2. Run Internet Service Manager in the Programs/ Administrative Tools menu. Configure SMTP as follows:
   - Right-click Default SMTP Virtual Server. From the menu that appears, select Properties.
   - In the Default SMTP Site Properties window, click the Delivery tab, and then click Advanced.
   - In the Advanced Delivery window, type the name of your domain's SMTP mail server in the Smart host field. You may also enter the IP address of the mail server surrounded by brackets, such as [127.0.0].
3. In Windows Explorer, locate the temp folder under the eTimesheets folder (typically C:\Inetpub\wwwroot\eTimesheets). The temp folder is used by eTimesheets for storing e-mail attachments before sending them.

   Right-click on the folder. From the menu that appears, select Properties.
4. In the folder Properties window, click the Security tab. Do the following:
   - Click Add. In the Select Users, Computers, or Groups window that appears, select the local domain for the Web server in the Look in field. Select IUSR_WEBSERVER and click Add.

- In the Security tab, select IUSR_WEBSERVER. Under Permissions, select Allow for Full Control. Click OK.

Installing the eTimesheets client

The eTimesheets client can be installed on a PC or Macintosh.

On a PC, the eTimesheets client can be installed in Windows 2000, XP, or 2003.

On a Macintosh, the eTimesheets client can be installed in Mac OS X 10.1 through 10.4.

To install the eTimesheets client in Windows:

1. Double-click SageMAS500eTimesheets.exe on the eTimesheets installation CD-ROM to start the eTimesheets installer.
2. Click Next to continue.
3. Click Next to continue. The license agreement appears.
4. Review the license agreement and select the I accept the terms in this license agreement option.
5. Click Next to continue.
6. When you are prompted to enter your information, the fields show the name and organization as recorded in the Windows Registry. You can change this information as desired and select whether the software is available to all users or just yourself. Click Next to continue.
7. Leave the Complete option selected and click Next to continue.
8. Click Install to install the software. A status bar indicates the progress. To cancel the installation, click Cancel.
9. Click Finish to quit the installer.

To install the eTimesheets client in Mac OS X:

1. Drag the client from the \mac folder on the eTimesheets installation CD-ROM to the Mac OS X Applications folder.

Launching eTimesheets

To launch eTimesheets:

1. From the Windows Start menu, select Programs > SAGE SOFTWARE > Sage MAS 500 > eTimesheets > eTimesheets.

   If this is the first time you are starting eTimesheets, a dialog box appears, which allows you to enter the eTimesheets Web server address. The Web address will look something like this:

   http://Web server domain name/etimesheets

   After you have entered the URL of the eTimesheets Web server, the eTimesheets Login window appears.
2. The first time you enter the login window, enter “ADMIN” as the login and “access” as the password. Logging in as ADMIN allows you to modify eTimesheets resources, including passwords. It is recommended you change the password of the admin user.

   Note: When you open the Login window in the future, you will enter your resource ID and password. This allows you to access the task menus. The resource ID is set up in Project Accounting Maintain Resources. The password defaults to “access,” but can be changed by the admin user.
3. Select the company you want to use.
4. If you want the system to remember your login password, select the Remember Password option.
5. Click Login to open the Administration window.
6. Click a blank line to display the Lookup button. Click the User ID lookup button and select the resource that you want to add to eTimesheets.

   Note: To delete a resource, select the resource from the scrolling window and click the Delete (trash can) button. The resource will not be deleted from Project Accounting; the resource will only be deleted as a resource in eTimesheets.

7. Enter the resource password and confirm the password by entering it again.
8. Click the Save icon to save the entries made in the Administration window.

   Note: Click the Synchronize button to add all active resources in Project Accounting to eTimesheets. All added resources will have a password of *access*. It is recommended you change the user passwords the first time you log in using the Preferences window.

Setting up user access

Use the User Menu Access window to assign individual users to the eTimesheets menu options so that you can manage which users have access to each menu option. All resources will default for transactions, inquiries, user options, and approvals.

> **Note:** You must set up resources in Project Accounting Maintain Resources before you can assign user access.

Procedure

To set up user access:

1. Select Setup > User Access menu to open the User Menu Access window.
2. Double-click the Menus folder to display the available menu options.
3. Highlight each user from the left side of the window that you want to assign to a menu option. To select more than one user, hold down the Shift key while you select the users. Then highlight the menu option that you want the user assigned to and click the insert arrow (>).

   To remove a user from a menu option, highlight the user within the menu option and click the Remove arrow (<). To add all users to a menu option, click the Add All Users arrow (>>). To remove all the users from an option, highlight the menu option and click the Remove All Users arrow (<<).

Click the Save button to save your entries.

Continuing the System Configuration

Where to find procedures

To continue configuring the Internet Applications, use Sage MAS 500 to set options for the Web site. See the following chapters:

- For eCustomer, see Chapter 5, *Configuring the System for eCustomer*.
- For eSalesforce, see Chapter 6, *Configuring the System for eSalesforce* to complete the configuration.

Configuring the System for eCustomer

5

You need to set up options in Sage MAS 500 to use eCustomer. These include:

- Set general options, such as the server and database used by eCustomer and search settings.
- Create product groups for organizing merchandise on the Web site and assign graphics to them.

See the following sections for instructions on performing these tasks. For more information about individual windows, see the online Help.

In this chapter

Setting Up the eCustomer Web Site

Overview

Introduction

This section shows you how to configure the eCustomer Web site. This process consists of the following tasks that need to be performed on the Web server and in Sage MAS 500:

- On the Web server:
  - Make sure that a folder is set up for inventory images.
  - Use the Site Maintenance page to select the database and company used by the site and set the site status.
- In Sage MAS 500: Make sure you have Set Up CI Options to set site options. See *Setting Site Options in Sage MAS 500* on page 78.

Using the Folder for Item Images

Introduction

The Web site uses the InventoryImages folder to store images of items to appear in the Web site. You can also use images on the Internet at their present location. For more information, see *Adding Images and Descriptions to an Item* on page 107.

Requirements

You need to do the following with the InventoryImages before using it:

- Keep the folder with the name InventoryImages and in its location within the Web site folder. Do not move or rename it.
- Set the folder up as a shared folder that can be accessed by Sage MAS 500 client systems. You can use any name you want as the share name. See the Windows 2000 documentation for instructions on setting up shared folders in Windows Explorer.

- Make sure you have NetBIOS access to the shared folder either through the network or a VPN. You need NetBIOS access to be able to maintain the graphic files.

Designation of folder

In the path to the images folder, use the UNC (Universal Naming Convention) designation of the drive. Mapped drive letters are also supported, but using them requires all users to map the folder to the same drive letter.

Setting up the folder

In Common Information, enter the name of the shared folder so that images are linked to items in the database. For instructions, see *Adding Images and Descriptions to an Item* on page 107.

Configuring the Web Site

Introduction

Use the Web Site Maintenance page to select the company and open the Web site for business. You can also use this page to do the following:

- Open or close the store, as shown in *Managing the Site* on page 93.
- Process transactions that cannot be processed as shown in *Processing Orders in Queues* on page 163.

You can open the page either remotely from a browser or from the Web server.

Procedure

Follow this procedure.

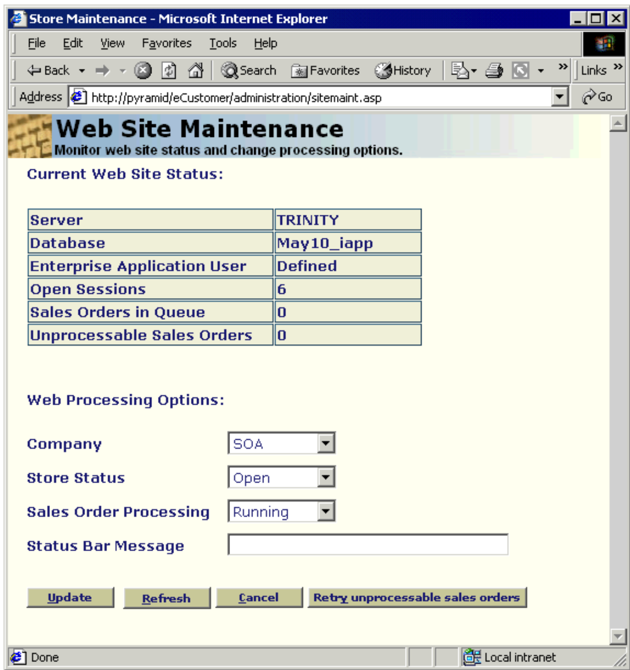
1. Do either of the following:
   - ► To launch the page from the Web server: From the Windows Start menu, select Programs, then Sage MAS 500 Internet Applications, then eCustomer, and then eCustomer Site Maintenance.

- From Internet Explorer: Open the following Web page:

  http://server/folder/administration/sitemaint.asp

  Where *server* is the Web server and *folder* is where the eCustomer Web components are installed. See *Determining the URL* on page 34 for an explanation of how the address of the site is determined.

The following Web page appears.



2 Select the company. The Web site supports only one company at a time.

Note: If the company you want does not appear in this field, it means that eCustomer has not been activated for that company. See the *Installation and System Configuration* guide for instructions.

3 Click Update to make the change.

When changes take effect

If there are people using the Web site when you make changes, they will see and use the new settings as they refresh data in the browser and process information.

Managing the Site

Introduction

The eCustomer Web site enables you to open or close the order entry portion, enable or disable order processing, and specify a message describing the status of the site. You perform these functions through sitemaint.asp.

Setting site status

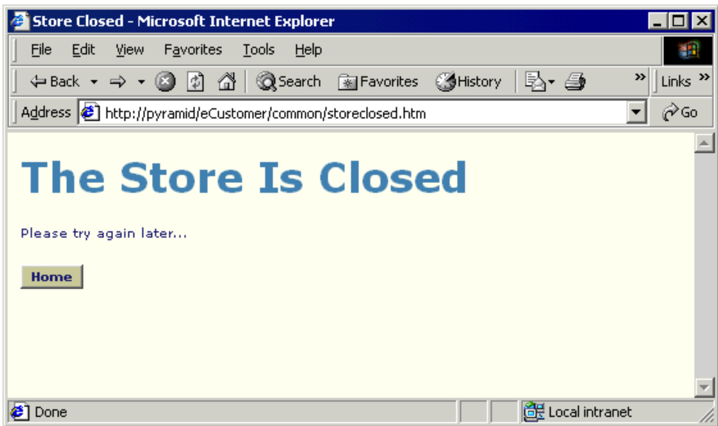
To open sitemaint.asp, see the instructions in *Configuring the Web Site* on page 91. Set the Web Processing Options fields as follows:

Field	Options
Company	Select the current processing company from those in the Sage MAS 500 Internet application database.
Store Status	Closed: Users cannot log into the order entry portion of the Web site. Open: Users can log in.
Sales Order Processing	Running: Orders from the Web site are being processed and updating the databases. Stopped: Orders can still be accepted from the Web site, but the databases are not being updated.

Field	Options
Status Bar Message	Type a message of up to 128 characters to appear on the status bar of the user browser. This fields should only be used to provide important messages to users. Because this message is not saved in the database, it should not be used for long-term advertising.

Closing the web site

If you set the Store Status to Closed, the following page appears when users click Login:



Customizing the Store Closed page

You can customize this page – /Common/StoreClosed.htm – to give additional information. For information about changing this and any of the pages on the Web site, see Chapter 8, *Customizing the Web Sites*.

Diagnosing processing issues

Sitemaint.asp also provides status on the operation of the Web site. If customers are placing orders but the database is not being updated, make sure that the Sales Order Processing field is not set to Stopped. If it is, set it to Running. For more information, see *Diagnostic Web Pages* on page 154.

Making Items Available for Sale

Overview

Introduction

To make items available for sale through the eCustomer Web site, do the following:

- Create or modify the inventory or noninventory item with the necessary settings.
- Assign the item to at least one product category. Product categories enable you to organize items so that they are easy for customers to find. The product categories you set up for eCustomer can also be used in Sales Order and Purchase Order entry.

Before you begin, see the *Inventory Management* guide for instructions.

Selecting Items to Sell

Requirements

To enable an item to be sold through the Web site, do the following:

- Assign inventory items to at least one warehouse. Customers will only see on the Web site inventory items at their assigned warehouse. This rule does not apply to non-inventory items.
- Set up the pricing structure and set prices for the items you want to sell through the Web site.
- Assign inventory and non-inventory items to a sales tax class so that they can be processed in Sales Order.
- On the UOM tab of the Maintain Items form, select the Use For Sales check box. The box must be selected for at least the standard Sales unit of measure and for any units of measure you plan to use on the eCustomer site.

Structure of Product Categories

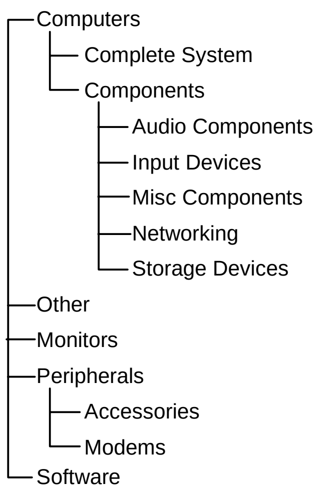
Introduction

Product categories enable you to organize items to make them easy for customers to find on your Web site. This section describes how product categories work and some precautions you need to know when setting up categories.

Hierarchy of product categories

You can organize product categories in a hierarchy with different levels of categories. The number of product categories and levels you can create is only limited by system memory and disk space.

The following figure shows another example of a hierarchy and how it appears when you set up categories in the Inventory Management module.



Assign items to a product group that does not have subgroups attached to it. In the example above, you can assign items to the Complete System and Audio Components group, but you cannot assign items to the Computers or Components groups.

You can assign an item to more than one product category.

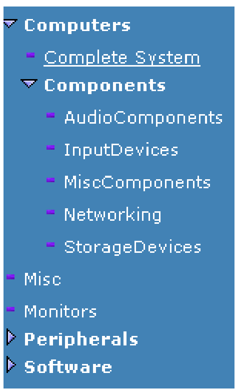
Rules on product category names

Product category names have the following rules:

- They must be unique within an Sage MAS 500 company. You can use the same name in another company, even if it is in the same database.
- You can use uppercase and lowercase characters and spaces.
- They must be a maximum of 20 characters. However, keep in mind that there is a limitation in the width of the catalog frame on the Web site. If you have a long product category name that is several levels down in the hierarchy of categories, the full name might not appear.

How product categories appear on the Web site

The product categories appear in the catalog frame of the order entry page. The Active Server Page for the catalog frame reads the category information from the database and automatically creates expanding and contracting headings when you have more than one level of categories.



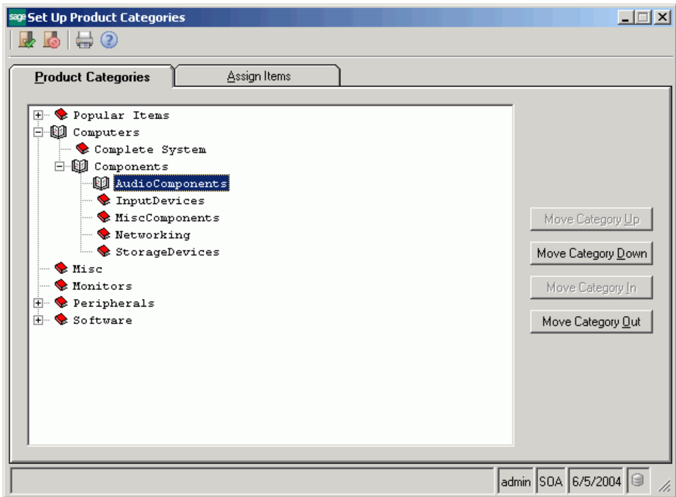
Click a heading expands a contracted listing and contracts an expanded listing.

Creating and Changing Product Categories

Procedure

Follow these steps to create product categories and change them as needed:

1. In Inventory Management, select Maintenance, IM Setup, and then Set Up Product Categories. The following window appears:



2 Depending on whether you want to put the product category at the top level or make it a subgroup of an existing product group, do one of the following:

Task	Procedure
To put the category at the top level of the hierarchy.	Right-click on any empty space in the box.
To make a new subcategory of an existing product category.	Right-click on the category where you want to put the new group. If the category already has items assigned to it, you need to move the items to another category before creating the subcategory. See *Assigning Items to Product Categories* on page 101 for instructions on assigning and removing items from product categories.

3 From the menu that appears, select New Category. A space appears in the box where you can type the name of the new category. Make sure it is a unique name.

4 You can change any of the categories. Select the category and do any one of the following:

Task	Procedure
Change the order that a category appears in its level of the hierarchy.	Click Move Category Up to move it up the list or Move Category Down to move it down.
Move a category up a level in the hierarchy.	Click Move Category Out.

Task	Procedure
Make an existing category a subcategory of another category.	Click Move Category Up or Move Category Down so the category is below the category where you want to assign it. Then, click Move Category In. It becomes a subcategory of the category above it.
Rename a category.	Right-click on it. From the menu that appears, select Rename Category. You can then type a new category name.

Tip: You can also right-click on a category and select commands for moving it from the menu that appears.

5 If you want to assign items to product categories now, skip to *Assigning Items to Product Categories* on page 101.

If you are finished, click Finish and Exit to accept the changes you made.

Deleting Product Categories

Procedure

To delete a category, right-click on it and, from the menu that appears, select Delete Category.

Precautions

Note the following if you delete a category:

- You can only delete categories that do not have subcategories assigned to them. If you have to delete an entire category with subcategories, delete each of the subcategories first and then delete the main category.
- When you delete a category, you lose the assignments you made to items. The items must be assigned to other categories in order for them to appear on the Web site.

- The deletion takes effect once you click Finish and Exit. If you deleted a category by mistake, click Cancel and Exit. This also means that you will lose any other unsaved changes. Once you click Finish and Exit, the change cannot be undone.

Assigning Items to Product Categories

Ways of assigning product categories

You can assign inventory and non-inventory items to product categories in either of the following ways in Inventory Management.

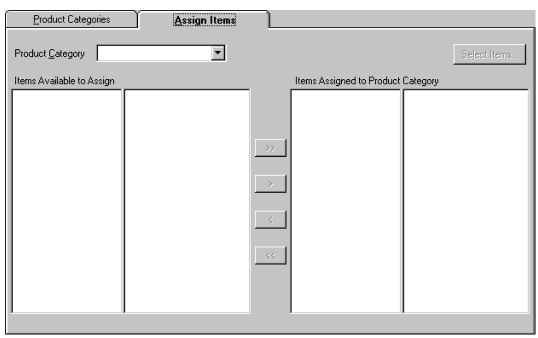
- To assign multiple items at one time, use the Set Up Product Categories window.
- To assign categories to an individual item, use the Maintain Items window.

You can put an item in more than one product category.

Assigning multiple items to product categories

To assign multiple items to product categories through the Set Up Product Categories window, follow these steps:

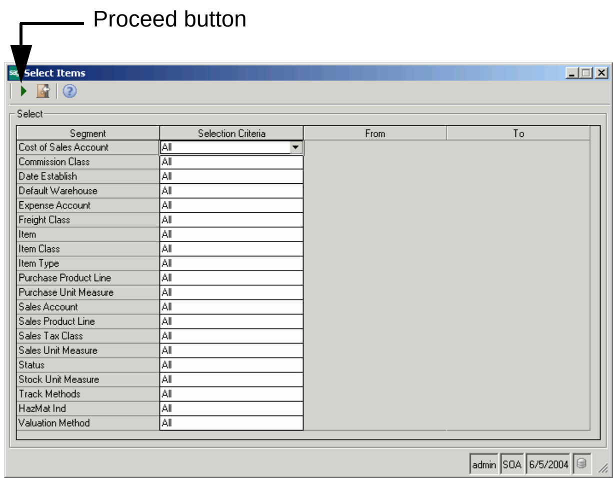
1. In Sage MAS 500, go to Inventory Management and select Maintenance, IM Setup, and then Set Up Product Categories.
2. Click the Assign Items tab as shown:



3 Select a product category to which you want to assign items. If there are items already assigned to that category, they appear under Items Assigned to Product Category on the right. The Select Items button becomes active.

Note: The Product Category field only lists categories to which items can be assigned. These categories do not have subcategories. For an explanation, see *Structure of Product Categories* on page 96.

4 Click Select Items. A search window appears as follows:



Select the search criteria you want and then click the Proceed button. The items that match the criteria appear under Items Available to Assign.

5 Do any of the following to assign or remove items to product categories:

Task	Procedure
To add individual items to the selected product category.	Select the items you want to assign under Items Available to Assign. To select more than one, hold down Ctrl as you click each item. To select a range, click on the first item and Shift+click on the last. Click >. The selected items move to the Items Assigned to Product Category boxes.
To add all items to the selected product category.	Click >>. All of the items under Items Available to Assign move to Items Assigned to Product Category.
To remove individual items from the selected product category.	Select the items you want to assign under Assigned to Product Category. To select more than one, hold down Ctrl as you click each item. To select a range, click on the first item and Shift+click on the last. Click <. The selected items move to Items Available to Assign.
To remove all items that were assigned to the selected product category.	Click <<. All of the items under Items Assigned to Product Category move to Items Available to Assign.

Tip: You can also drag and drop items from one box to another.

6. When you have finished making assignments for this product category, you can select another product category. You are prompted to save your changes.

   Repeat steps 3 through 5 for each product category to which you want to assign items. You can place the same item in more than one product category.

7. Click Finish and Exit when you are done. This saves any unsaved changes.

Assign product categories to an individual item

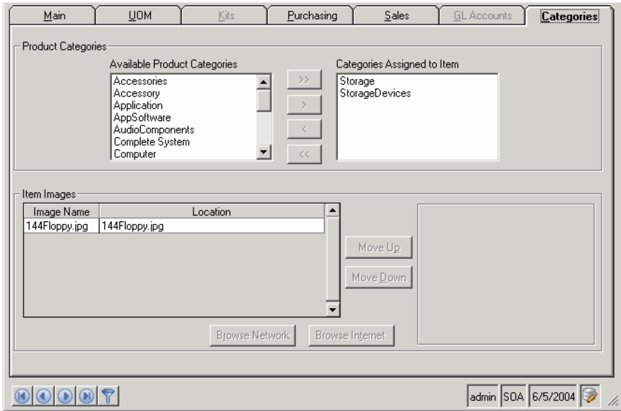
You can use the Maintain Items in Inventory Management or Maintain Non-Inventory Items in Common Information to assign an individual item to a product category. You may want to use this procedure in the following situations:

- When you need to make other changes to an item.
- When you are creating a new item and want to assign it to a category.
- When you want to add images to the item as you assign it to a product category. For more information about adding images, see *Adding Images and Descriptions to an Item* on page 107.

The following procedure shows how to assign product categories.

1. Do either of the following in Sage MAS 500:
   - For inventory items: In Inventory Management, select Maintenance, and then click Maintain Items.
   - For non-inventory items: In Common Information, select Maintenance, Maintain Non-Inventory Items, and then Maintain Non-Inventory Items.
2. Open the item that you want to assign.

3 Click the Categories tab, which appears as shown:



If the item has been assigned to product categories, they are listed in the Product Categories Assigned to Item box.

4 Assign or remove product categories as shown:

Task	Procedure
To assign individual product categories.	Select the items you want to assign under Available Product Categories. To select more than one, hold down Ctrl as you click each item. To select a range, click on the first item and Shift+click on the last. Click >. The selected items move to the Categories Assigned to Item box.
To add the item to all product categories	Click >>. All of the items under Available Product Categories move to Categories Assigned to Item.

Task	Procedure
To remove individual items from the selected product category.	Select the items you want to assign under Categories Assigned to Item. To select more than one, hold down Ctrl as you click each item. To select a range, click on the first item and Shift+click on the last. Click <. The selected items move to Available Product Categories.
To remove all items that were assigned to the selected product category.	Click <<. All of the items under Categories Assigned to Item move to Available Product Categories.

Tip: You can also drag and drop items from one box to another.

5 Click Save to accept the changes.

Adding Images and Descriptions to an Item

Overview

Description

eCustomer enables you to add images and a description of each item you sell through your Web site. You can use images saved to your server or upload images from the Internet or an intranet.

Requirements for Images

Supported formats

You can use any image format that is supported by Internet Explorer, including JPEG files and static, interlaced, and animated GIFs. Keep the following in mind:

- The image will appear in the Web site in a box of 140 x 140 pixels and be resized as needed to fit in the box. For best image quality, use an image that is 140 x 140 pixels so that it does not get distorted through resizing.
- Avoid using a high number of colors. If a user has set the display to a low number of colors (such as 256), a high-color image might not look right.
- Make sure you have legal rights to use the images on your site.

Where to Store Images

Introduction

With eCustomer, you can either upload images to your server or use them from the URL where you found them.

Location where images are stored

When you upload images, they are saved in the location you specify in the Inventory Images Share Name field in Set Up CI Options. (See *Setting Up the eCustomer Web Site* on page 90 for more information.) If you want to maintain images through the shared folder, you need NetBIOS access to that folder.

Images and security

If you are using Secure Socket Layer (SSL) security, it is recommended that you upload images to your Web site. SSL generates a warning when a secured Web site makes reference to elements on non-secure Web sites. See *Secure Socket Layers (SSL)* on page 31 for more information.

Comparison of image locations

The following table lists the advantages and disadvantages of each option:

Option	Advantages	Disadvantages
Uploading to server	Images are always available; you do not need to worry about missing files. Do not need to provide a long path for specifying the file location. Can edit file as needed.	Do not get updated images automatically. Need to upload new images when they change. Need NetBIOS access to shared folder to maintain files.

Option	Advantages	Disadvantages
Keeping them at their location	When images are updated at the other site, the updated images go on your site as well. Frees drive space on your server.	Makes you dependent on some other company's Web system. When the other company changes paths or filenames, you can lose the file, affecting the appearance of your Web site. Cannot edit file. Need to provide a long path to the graphic. Not recommended if your Web site uses SSL.

Adding Images and Descriptions

Procedure

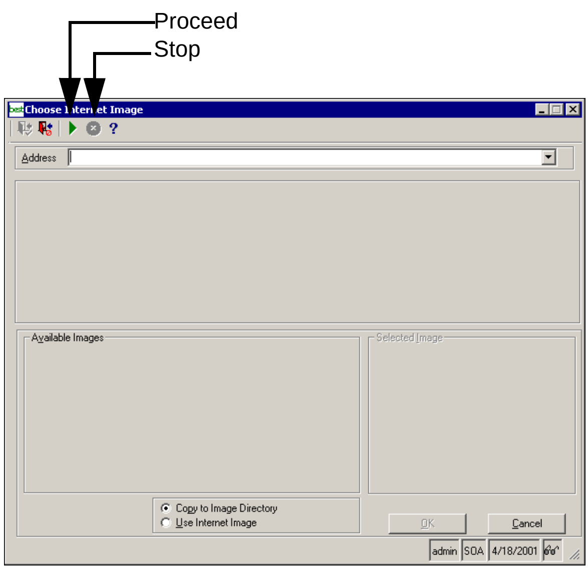
Use the Maintain Items task in Inventory Management to add images and descriptions. Follow these steps:

1. Do either of the following:
   - For inventory items: In Inventory Management, select Maintenance, and then click Maintain Items.
   - For non-inventory items: In Common Information, select Maintenance, Maintain Non-Inventory Items, and then Maintain Non-Inventory Items.
2. Open the item that you want to assign.
3. Make sure the name of the item clearly identifies it. The Web site uses the name in the header to label the product on the Web site.

4 In the Long Description field in the header of the Maintain Items window, type a description of the item that you want to have appear in the Web site. You can enter up to 255 characters.

5 Click the Categories tab. Add image files by doing any one of the following:

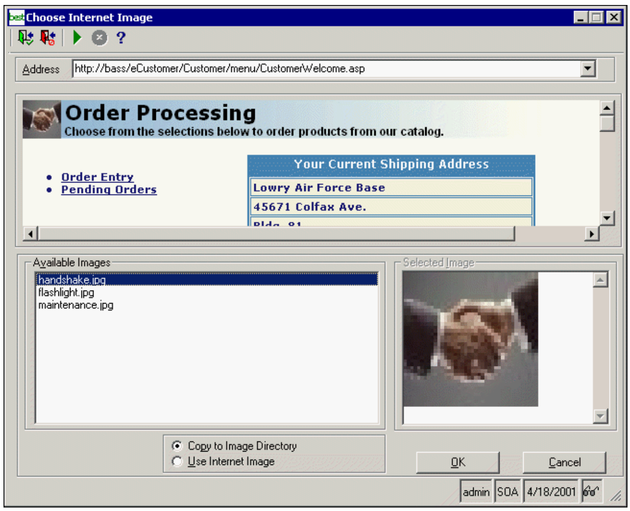
- If you know the name of the file, type it in the Location column. If the file is in a location other than the one specified in Set Up CI Options, include the whole path.
- To select a file from a local drive or a network drive to which your system is attached, click Browse Network. An Open window appears from which you can select the path and file.
- To select a file by specifying a URL, click Browse Internet. The following window appears:



Type the address of the site in the Address field and press Enter or click Proceed. The browser only connects to addresses through HTTP and HTTPS, not FILE and FTP.

The Web page appears in the middle of the window. You can click on the links in the window to go to other pages, but the browser does not support links that open in a separate browser window. As you navigate, the list of images changes to show the images on the page you are viewing.

A list of the .GIF and .JPG files in the site appears in the bottom left box. When you select an image, it appears in the box on the bottom right.



Select the image you want. Then, select whether you want to copy the image to your server or use Internet image (which means that it will be left at its current location). Click OK to add the image.

6 To continue to adding images, repeat step 5. If you are finished adding images, click Save.

Setting Up Customers

Overview

Introduction

In order for customers to use the Web site, they need to be granted access. In Sage MAS 500, you set up one of the customer's buyers to be administrator. That person can then set up access for the other buyers for that customer.

This section explains how the eCustomer Web site uses customers, how to set them up in Sage MAS 500, and how customers set up additional buyers from the Web site.

> **Note:** If the Sales Order and Inventory Management modules are not activated, you cannot use MAS 500 to set up customers. In this case, use eOrder or eSalesforce to launch eCustomer, and then set up customers in eCustomer's Buyer Maintenance page.

Explanation of "customer"

The term "customer" refers to the organization that uses your site, whether it is a purchasing department or an individual who buys products for a company. A customer can have more than one buyer. With eCustomer, each buyer can have an individual login and password. Customers designate supervisors who review and approve orders generated by the buyers and administrators who set up and maintain other buyers for a customer.

Levels of Access Rights

Introduction

This section explains the different levels of access available to customers and other issues involved in setting up a customer on the site.

Basic access rights

Every buyer on the Web site has basic user access rights that enable them to place and process their own orders. You can assign additional access rights that enable users to perform additional tasks on the Web site.

Additional access rights

Each user can be granted additional levels of access.

Level	Description
Administrator	Can add new buyers for a customer through the Web site, set up transaction limits, and set access options for any user. You must have at least one administrator per customer.
Supervisor	Can process other buyers' shopping carts if the cart total is less than the supervisor's transaction limit.
Allow Inquiry	Can view account information and run inquiries.
Allow Maintenance	Can change customer address information, when this feature is available.

You can assign more than one of these additional levels to the same buyer. For example, a customer should have a main administrator who has all four of these additional access rights.

Administrators

Each customer needs to have at least one buyer to be designated as an administrator. Administrators can create, modify, and delete other buyers from the Web site.

A customer can have more than one administrator. Once you have created the first administrator from Sage MAS 500, that person can create other administrators.

A customer cannot create its first administrator from the Web site. Consider adding an e-mail link or a form to your Web site where customers can request to be added as an administrator to the Web site. The Web site cannot be modified so that the first administrator for a new customer can be added directly from the Web site.

Customers who do not have administrators cannot administer the buyers from the site, but you can administer all buyers from Sage MAS 500, whether they were created from the Web site or in the CI module.

Transaction Limits

Introduction

Each buyer can have a transaction limit, which is the maximum amount the buyer can purchase on a single order. Customers can set different transaction limits for each of their people who use the site. For example, they may put a $10,000 limit on buyers and a $25,000 limit on supervisors.

Unlimited transactions

If you do not want to restrict the amount a buyer for a single order, set the transaction limit to 0.

Limits on total orders

There is no limit on the total of orders generated by a buyer, but the total of orders are subject to the customer's credit limit. If the customer is over the credit limit, the orders still go to Sage MAS 500, but they are placed on hold until the customer pays down their account or their credit limit is increased.

For information about setting the credit limit, see *Activating Customers Created from the Web Site* on page 148.

Currency of the transaction limit

The currency of the transaction limit is determined by the home address of the transaction company selected in Sage MAS 500. If the home address is in London, enter the transaction limit in British pounds. If you change the home address to Los Angeles, the transaction limit is interpreted as United States dollars, but the amount is not translated from pounds to dollars. The former £10,000 limit becomes $10,000. Therefore, remember to change the amount of customer transaction limits when you change the home address to another country.

Adding and Administering Buyers

Linking buyers to customers

All the buyers for a customer are linked to the customer record in Sage MAS 500. Their information is retained in transaction records for audit trail purposes.

Where to create buyers

You can create any buyer for a customer through Sage MAS 500. Typically, you just create the first administrator through Sage MAS 500 so that customers can add, manage, or delete buyers themselves through the Web site. However, you can change or delete any buyers through the Sage MAS 500, including those created from the Web site.

Setting up customers in Accounts Receivable

Before you add a buyer, you need to set up the customer information in Accounts Receivable and follow the requirements for login names and passwords.

You need to set up the customer in Accounts Receivable as an Accounts Receivable customer. The customer needs to have at least one of the following:

- Ship-to address
- Contact
- Default warehouse

For instructions on setting up customers, ship-to addresses, and contacts see the *Accounts Receivable* manual. For information about setting up warehouses, see the *Inventory Management* manual.

Important: Customers will only be able to order inventory items that are in their assigned warehouse. For more information, see *Selecting Items to Sell* on page 95.

Login name and password requirements

The login name and password for each buyer needs to meet the following requirements:

- The login name must be at least six characters long.
- The password must meet the following requirements:
  - At least six characters long.
  - Alphanumeric characters only.
  - Different from the login name.
- Passwords are always case-sensitive. Note the case you use for the password.

Adding Sage MAS 500 users to eCustomer

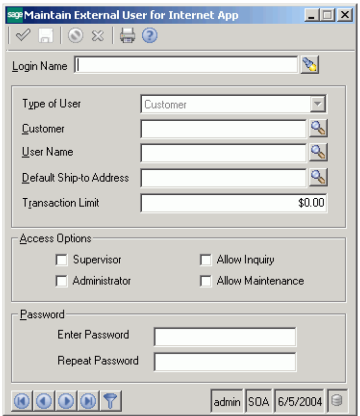
There are two ways that Sage MAS 500 users can gain access to the eCustomer Web site:

- If you are using eSalesforce, you can configure salespeople so that they can enter eCustomer through the eSalesforce Web site. For instructions, see *Setting Up Salespeople* on page 140.
- To enable Sage MAS 500 users to enter the eCustomer Web site directly, you need to set them up as external users. Logins for external users are separate from those for Sage MAS 500. A user's login name for eCustomer could be the same as that for Sage MAS 500, but there is no connection between the two logins.

Adding buyers through Sage MAS 500

Follow these steps to add buyers in Sage MAS 500:

1. In Common Information, select Maintenance, and then Maintain External User for Internet App. The following window appears:



2. Type the login name you want to use.

   Important: A dedicated user, ProcessWebSOUser, has been set up for adding sales orders to the application database. Do not delete this user. For more information, see *Requirement for ProcessWebSOUser* on page 163.

3. Select the customer, a customer contact (in the User Name field), and default ship-to address for this user. This information is defined through the Maintain Customer form in Accounts Receivable.
4. Type a transaction limit. For more information, see *Transaction Limits* on page 114.
5. To grant additional access rights, put a check in each box of the rights you want to add. For more information, see *Levels of Access Rights* on page 112.
6. Enter the password into both of the fields in the Password section.

7. Click Save. The user now has access to the Web site.

Changing User Information and Replacing Lost Passwords

Introduction

Use the Maintain External Users window to change the settings and passwords of any customers of the Web site, including buyers and administrators created through the Web site. You can change customer information, access rights, and passwords.

Procedure

Do the following to change information and passwords.

1. Open the Maintain External Users window as shown in *Adding and Administering Buyers* on page 115.
2. Click the Search button to the right of the Login Name field. From the Search window that appears, select the user. The user's information appears in the Maintain External Users window.
3. Change the information as needed. If you are issuing a new password, type it in both the Enter Password and Repeat Password fields.
4. Click Save.

Deleting Administrators and Buyers

Introduction

Deleting administrators and buyers removes their access to the Web site.

Precautions

Be careful of the following:

- Do not delete all of the administrators. You need at least one administrator to enable customers to administer users themselves through the Web site.

- Do not delete an administrator or buyer if there is an order from that person in the queue, because this can cause errors. Wait until the order is cleared from the queue before deleting the administrator. For information about viewing orders in the queue, see *Processing Orders in Queues* on page 163.

Procedure

To delete an administrator or buyer, do the following:

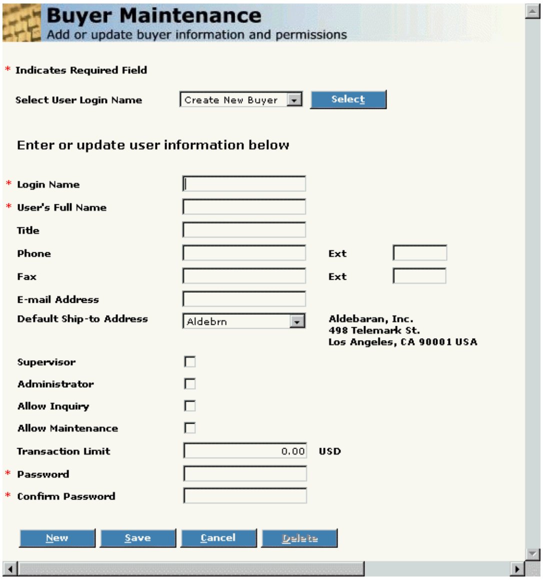
1. Open the Maintain External Users window as shown in *Adding and Administering Buyers* on page 115.
2. Click the Search button to the right of the Login Name field. From the Search window that appears, select the user. The user's information appears in the Maintain External Users window.
3. Click Delete. The administrator is removed.

Adding and Administering Buyers Through the Web Site

Buyer Maintenance page

Once you have created an administrator for a customer, that person can then add, change, and delete buyers through the Buyer Maintenance page of the eCustomer Web site. Administrators can get instructions from the online help of the Web site.

The following figure shows the Buyer Maintenance screen as it appears when an administrator uses the Web site:



Changes buyers can make themselves

Buyers who are not administrators can use the Buyer Maintenance page to view and change their own information, including their password. However, buyers who are not administrators cannot do the following:

- Change their own access rights and transaction limit.
- Add or delete buyers.

When Changes Take Effect

Description

Changes in buyer information take effect the next time that the buyer logs into the Web site. If the buyer is logged in while the changes are made, the old settings apply until the buyer logs out. This is true whether the changes are made through the Web site or Sage MAS 500.

Configuring the System for eSalesforce

6

This chapter shows how to install and configure SalesLogix integration and set up options in Sage MAS 500 to use eSalesforce. See the following sections for instructions on performing these tasks. For more information about individual windows, see the online Help.

In this chapter

Setting Up SalesLogix Integration

Overview

Introduction

This section shows you how to install the software and configure options in SalesLogix, Sage MAS 500, and the eSalesforce Web site to integrate with SalesLogix. Follow these procedures carefully to make sure that SalesLogix integration works properly.

Precautions

Note the following before proceeding:

- Before performing these procedures, make sure you have set up SalesLogix as shown in *Installing or Upgrading SalesLogix* on page 46.
- The integration with SalesLogix is limited to only one company within one Sage MAS 500 database. After a company has been integrated with SalesLogix, no other company in that Sage MAS 500 database can be integrated with SalesLogix even if SalesLogix integration with that company is disabled.
- Only one Sage MAS 500 database on a SQL Server can be used for SalesLogix integration.

Configuring the SalesLogix OLE DB Provider

Introduction

Install the SalesLogix OLE DB Provider on the same system as the Sage MAS 500 CRM Data Export Service. The SalesLogix OLE DB Provider is installed automatically with the SalesLogix version 6.1 client. If you are installing on the CRM Data Export Service on a separate server, install the SalesLogix OLE DB Provider Merge module on that server from the SalesLogix version 6.1 CD-ROM 1. For information, see the SalesLogix documentation.

Setting up the Sage MAS 500 connection

Use the SalesLogix Connection Manager to set up the connection with the Sage MAS 500 database. See the instructions in the *SalesLogix Implementation Guide* to run the SalesLogix Connection Manager and add a server connection. The server connection for Sage MAS 500 must be called CRMDB (all capitals).

Linking SQL Server Logins

Introduction

The Sage MAS 500 and SalesLogix databases need a linked SQL Server login. The linked login needs SELECT, INSERT, UPDATE, DELETE, and EXECUTE permission to all the SalesLogix database objects, including tables and stored procedures.

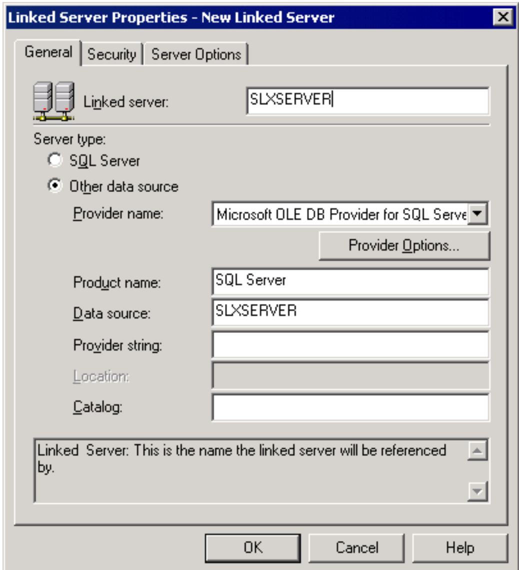
If a linked login does not exist on the SQL Server that hosts the SalesLogix server database, add one through SQL Server Enterprise Manager or Query Analyzer.

Using SQL Server Enterprise Manager

Follow these steps to create a linked login through SQL Server Enterprise Manager:

1. In SQL Server Enterprise Manager, connect to the SQL Server computer that hosts the Sage MAS 500 databases.
2. In the tree pane, expand the Security folder to view the Linked Servers.

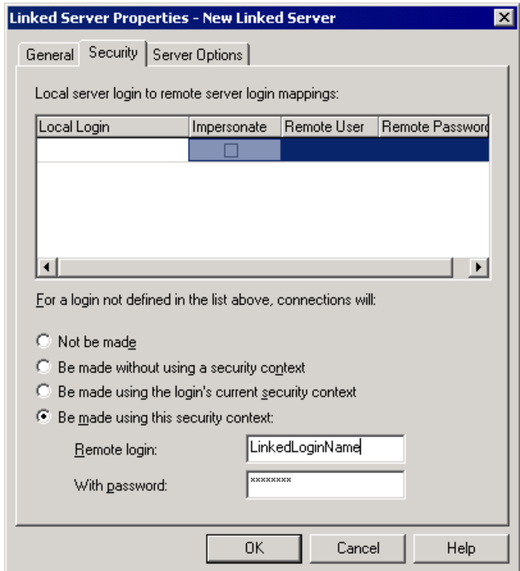
3 Right-click Linked Servers. From the menu that appears, select New Linked Server. The Linked Server Properties dialog box appears:



4 Make sure you are in the General tab. Type the following information:

- Linked Server: This should show the name of the SQL Server hosting the SalesLogix database. This name is used to identify the linked server in SQL queries.
- Provider Name: Select Microsoft OLE DB Provider for SQL Server.
- Product Name: SQL Server
- Data Source: This is the host name of the computer hosting SalesLogix database.

5 Click the Security tab as shown:



Select "Be made using this security context" and type the following information:

- Remote Login: The login name used by the SQL Server that hosts Sage MAS 500 to query the data to the SQL Server that hosts the SalesLogix database.
- With Password: The login password.

6 Click OK. The linked login is created.

Using SQL Server Query Analyzer

To set up the linked login by running a SQL query, follow these steps:

1 Open SQL Server Query Analyzer. Connect to the SQL Server that hosts Sage MAS 500 databases.

2 Copy the following SQL statements to a query window:

```
EXEC sp_addlinkedserver
'ServerName'

GO

EXEC sp_addlinkedsrvlogin
        'ServerName',
        false,
        null,
        'LinkedLoginName',
        'LinkedLoginPassword'

GO
```

Where *ServerName* is the name of the SQL Server that hosts the SalesLogix database, *LinkedLoginName* and *LinkedLoginPassword* are the login name and password for the SalesLogix database server.

3 Execute the query on the SQL Server master database.

Installing the CRM Data Export Service

Description

The CRM Data Export Service is a series of DLL files that transfer data from the Sage MAS 500 database to the SalesLogix system database. You need to install this software before you enable SalesLogix integration with eSalesforce. Install the software by running the Installation wizard.

Where to install the CRM Data Export Service

Install the CRM Data Export Service on the same system as the SQL Server with the Sage MAS 500 databases. Make sure you are connected to the SalesLogix server before continuing.

Requirement for SalesLogix OLE DB Provider

The CRM Data Export Service installation checks to see if the SalesLogix OLE DB Provider has been installed. If it is not installed, you are prompted to install it. Click Cancel and then install the SalesLogix client, which installs the

SalesLogix OLE DB Provider, or install the SalesLogix OLE DB Provider from the SalesLogix version 6.1 CD-ROM. See *Configuring the SalesLogix OLE DB Provider* on page 122.

If you do not install the SalesLogix OLE DB Provider, you are still able to install the CRM Data Export Service, but you need to do the following to complete the installation:

- Install the SalesLogix client.
- Configure the SalesLogix OLE DB Provider as shown in *Configuring the SalesLogix OLE DB Provider* on page 122.

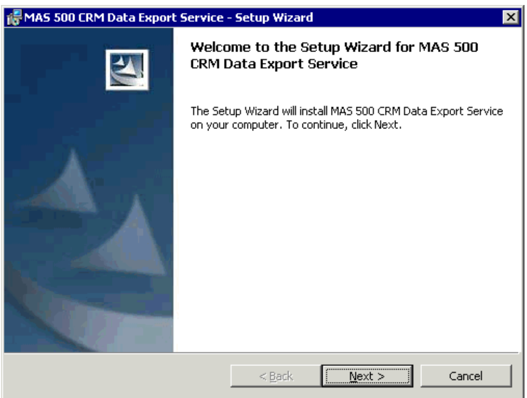
Procedure

Follow these steps to install the CRM Data Export Service:

1 To start the CRM Data Export Service Installation wizard, do any one of the following:

- ▶ Insert the Sage MAS 500 CD-ROM into the CD-ROM drive. From the installation window that appears, click CRM Data Export.
- ▶ Use Windows Explorer to navigate to the CRMExport folder on the CD-ROM. Run Setup.exe.

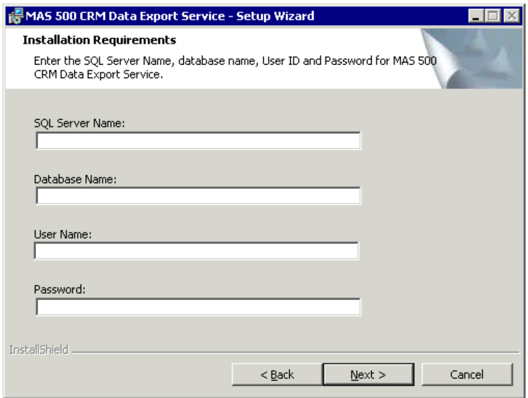
When the wizard starts, the following window appears:



Click Next to continue.

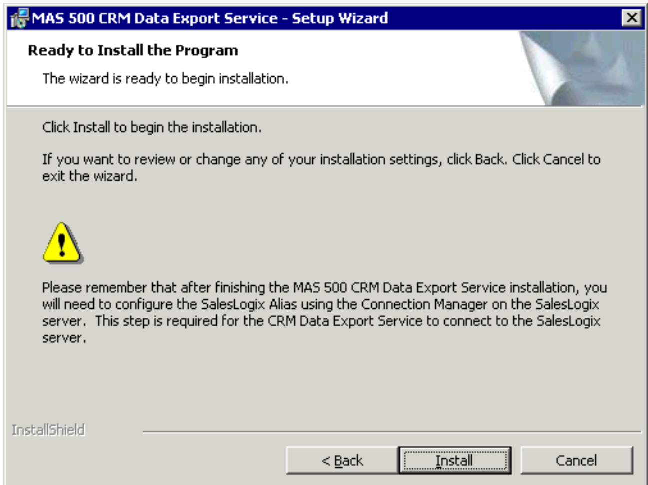
2 Review the license agreement that appears on the screen. Then, select “I accept the terms in this license agreement” and click Next to continue.

3 In the screen that appears, enter information about the Sage MAS 500 application database:



Type the name of the SQL Server and Sage MAS 500 application database you want to link to the SalesLogix system. Also enter a valid SQL Server user name and password for the database. Click Next to continue.

4 The following screen prompts you configure the SalesLogix alias after completing the installation. If you have not already done so, set up the Sage MAS 500 connection as shown in *Configuring the SalesLogix OLE DB Provider* on page 122.



5 Click Install. Files are automatically installed in the Windows System folder and the Sage MAS 500 folder under CRM Data Export.

6 Use the SalesLogix Connection Manager to create an alias that enables the CRM Data Export Service to connect to the SalesLogix server. See the instructions in the *SalesLogix Implementation Guide*.

Integration Setup in SalesLogix

Introduction

In SalesLogix, start the server and add components and toolbar buttons to enable users to launch the eCustomer and eSalesforce Web sites from SalesLogix.

The toolbar buttons do not work until you set up integration in Sage MAS 500 and perform the first data export. For an explanation of the toolbar buttons, see *Using the Toolbar Buttons* on page 135.

Starting the server

Start the SQL Server in the same security context as the SalesLogix OLEDB service. If the SQL Server is logged on as a local service, the SalesLogix login fails.

Installing bundles

Bundles contain packaged add-ins, tables, and other custom components that you can apply to the SalesLogix system. The following bundles need to be installed, depending on which version of SalesLogix you are using.

Do the following:

- After the SalesLogix upgrade, install the Sage MAS 500 version 6.3 bundle. (Do not uninstall the preexisting Sage MAS 500 bundle.)
- For a new installation, install the bundles in the following order with SalesLogix Workstation Administrator:

Bundle	File name and location	Version of SalesLogix
Marketing	Marketing.sxb SalesLogix CD-ROM 1	SalesLogix Web only
Web Host	WebHost.sxb SalesLogix CD-ROM 1	SalesLogix Web only

Bundle	File name and location	Version of SalesLogix
Sage MAS 500	MAS500SLX6.sxb Sage MAS 500 Installation CD-ROM in \Support\SalesLogix\Bundles	Both SalesLogix Web and desktop
Sage MAS 500 (Web)	MAS500SLX6WEB.sxb Sage MAS 500 Installation CD-ROM in \Support\SalesLogix\Bundles	SalesLogix Web only

There may be other bundles for SalesLogix, but these are not required for eSalesforce integration. See the SalesLogix documentation for installation instructions.

Note the following when you perform the installation:

- To install the bundles, run the Workstation Administrator utility and use the Bundle Manager. See the SalesLogix documentation for instructions.
- If you did not install SalesLogix in the default folder, manually copy the bundle files to the SalesLogix folder after you have installed them. This step is not required if you installed SalesLogix in the default folder.

Adding buttons to SalesLogix client

Each user needs to add buttons to the toolbar of the SalesLogix client software. This task does not need to be done if you are using SalesLogix Web because the buttons are added as part of the bundle.

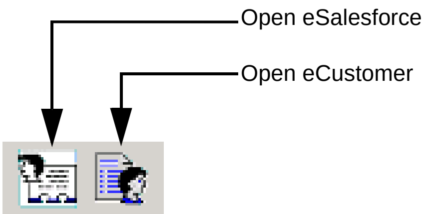
Follow these steps to add buttons to the SalesLogix toolbar:

1. In the SalesLogix client, from the Tools menu, select Client Options.
2. In the Client Options window that appears, click the Toolbars button.
3. In the Edit Toolbar List window, click Add.

4 In the Selected Plugin to Open window, expand the listing for System to show SES_Toolbar. Click SES_Toolbar and then click OK.

5 Click OK to close the Edit Toolbar List window, and then click OK to close the Client Options window.

6 Press F5 or click the Refresh button to refresh the screen. The toolbar buttons appear as shown:



Integration Setup in Sage MAS 500

Introduction

To set up SalesLogix integration in Sage MAS 500, do the following in Common Information:

- Set SalesLogix integration options.
- Perform the initial data export to SalesLogix.
- Set the schedule for exporting information from Sage MAS 500 to SalesLogix.

Prerequisites for completing CRM integration setup

Before running Sage MAS 500 to complete the SalesLogix integration setup, make sure that you have started the following services:

- SQL Servers where the Sage MAS 500 and SalesLogix system databases are running.
- SQL Server Agent (see *Running SQL Server Agent* on page 82).
- Distributed Transaction Coordinator (DTC).

These tasks are required for Sage MAS 500 to locate databases and servers available for enabling SalesLogix integration.

See the SQL Server documentation for instructions on performing these tasks.

Data export schedule

You can set a schedule for automatic exporting of Sage MAS 500 data to SalesLogix. (For more information, see *SalesLogix Integration* on page 10.) You can schedule data export to occur at regular intervals, such as every six hours or several days a week.

Regular data exports have minimal impact on processing, so you can schedule them as often as needed. The initial data export may take some time, so you might want to schedule it for when the system is not used.

Procedure

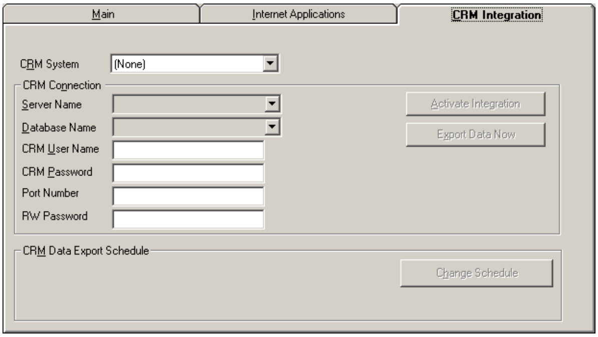
Follow these steps:

1. Make sure you have logged into Sage MAS 500 in the company you want to integrate with SalesLogix.

   Warning: Verify that you are in the correct company before you continue with this procedure. After you have activated SalesLogix integration, you cannot integrate SalesLogix with another company.

2. In Common Information, from the Maintenance menu, select CI Setup, and then Set Up CI Options.
3. In the Set Up CI Options window, click the CRM Integration tab. If you did not log in as a system administrator, you are prompted to enter the SQL Server system administrator password.

The following figure shows the CRM Integration tab:



4 In the CRM System field, select either of the following:

- SalesLogix to enable integration.
- None to disable integration and close the connection between SalesLogix and Sage MAS 500. To regain the connection, select SalesLogix and reenter the connection settings.

5 In the CRM Connection section, do the following:

- Select the SQL Server and SalesLogix database.
- Type a valid SalesLogix user name and password. The user name must be a valid user in the SalesLogix application, and the password, even if blank, must be initialized via SalesLogix WorkGroup Administration.
- Complete the Port Number and Read\Write Password fields with the settings you used when you installed the software. For more information about the Port Number and Read\Write Password fields, see the *SalesLogix Implementation* guide.

6 Click Activate CRM Integration.

Click OK. A dialog box indicates when the integration is complete.

7. To start using eSalesforce with SalesLogix integration, perform a data export from the Sage MAS 500 databases. Click Export Data Now. The data from the Sage MAS 500 database is exported to the SalesLogix database.
8. When you are finished, click Finish and Exit.

Data export schedule

To change the export schedule, click Change Schedule and follow the instructions in *Changing the Data Export Schedule* on page 137. You can also have the data exported at any time by clicking the Export Data Now button.

Using the Toolbar Buttons

Introduction

This section explains how to use the toolbar buttons installed in the SalesLogix desktop or Web versions. These buttons launch different parts of the eCustomer or eSalesforce Web sites, depending on where you are in the SalesLogix program and if you are viewing information for an existing customer in Sage MAS 500.

eCustomer button

This button appears in the toolbar of both SalesLogix Web and desktop. Clicking this button does the following, depending on whether or not you are viewing information for an existing customer.

Window where the button was clicked	Opens this page for existing customers	Opens this page for non-Sage MAS 500 customers
Account	Welcome page in eCustomer	Credit Application page in eSalesforce
Contact	Welcome page in eCustomer	Credit Application page in eSalesforce
Opportunity	Shopping Cart page in eCustomer	Credit Application page in eSalesforce

eSalesforce button This button appears in the toolbar of SalesLogix desktop or in the side menu of SalesLogix Web. Clicking this button opens your My Information page in eSalesforce.

Setting SalesLogix Integration Options

Overview

Introduction

After you set up SalesLogix integration, you can set the following options described in detail in this section.

- Change the data export schedule to have data transferred from Sage MAS 500 to SalesLogix and provide more up-to-date information.
- Specify a credit manager e-mail address where credit applications are sent from the eSalesforce Web site.

Changing the Data Export Schedule

Introduction

You can change the data export schedule to have more frequent transfers between the Sage MAS 500 and SalesLogix databases to keep the information up to date.

Effect on processing

Data export has minimal impact on processing performance, so you can schedule it as often as needed.

Procedure

Follow these steps to change the data export schedule:

1. Verify that you have logged into Sage MAS 500 in the company integrated with SalesLogix.
2. In Common Information, from the Maintenance menu, select CI Setup, and then Set Up CI Options.
3. In the Set Up CI Options window, click the CRM Integration tab. If you did not log in as a system administrator, you are prompted to enter the SQL Server system administrator password.

4 Click Change Schedule. See *Setting SQL Server Schedules* on page 79 for instructions on setting the schedule.

Setting Up Credit Manager Messages

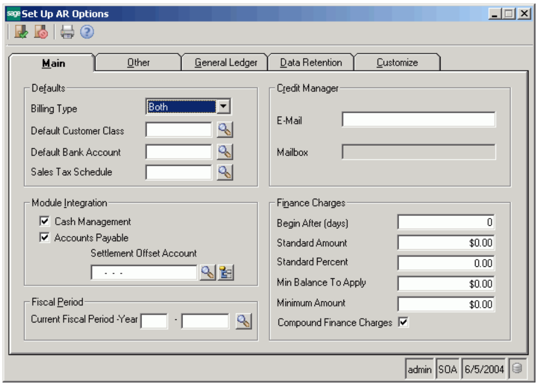
Introduction

When a salesperson completes a credit application through the eSalesforce Web site, it is sent to the credit manager. To enable this feature, you need to specify the credit manager's e-mail address in Set Up AR Options. You can also configure the system for additional e-mail communications between the credit manager and salespeople. For information, see the *Sage MAS 500 Cross-Module Utilities* guide.

Setting up credit manager e-mail

Follow these steps:

1 In Accounts Receivable, from the Maintenance menu, select AR Setup, and then Set Up AR Options. The following window appears:



2 Type the credit manager's complete e-mail address (name@company.com) in the E-Mail field. This enables the credit manager to receive credit applications that are sent from the eSalesforce site.

3 If you are using Microsoft Exchange and want to send e-mail messages from the credit manager to salespeople, type the credit manager's mailbox in the Mailbox field. This enables the credit manager to send documents through Microsoft Exchange.

4 Click the Finish and Exit button to save the change.

Setting Up Salespeople

Overview

Introduction

You need to set up your salespeople in both SalesLogix and Sage MAS 500 in order to do the following:

- Enable salespeople to log into the eSalesforce Web site. Only salespeople whose login information is entered in Accounts Receivable can log into the eSalesforce Web site.
- Track opportunities, prospects, and orders for the salespeople through the eSalesforce Web site. This information comes from both the SalesLogix and Sage MAS 500 databases, and needs to be connected to the salesperson.
- Keep the data in both the SalesLogix and Sage MAS 500 systems synchronized.

This section explains how to set up salesperson records in both SalesLogix and Accounts Receivable to use eSalesforce. For more information about setting up salespeople, see the SalesLogix and Accounts Receivable documentation.

Salespeople Export at Initial Integration

Options for setting up salespeople

You need to set up salespeople in both SalesLogix and Sage MAS 500.

When you first set up SalesLogix integration, you have several options for setting up salespeople, depending on whether you already have salespeople in either system. You can export salespeople records from Sage MAS 500 to SalesLogix when you initially set up SalesLogix integration, but be aware of the precautions of exporting data. These are covered in this section.

Methods for initial setup

When you initiate SalesLogix integration, you can use either of the following methods to set up salespeople, depending on whether salespeople exist in SalesLogix and Sage MAS 500:

Where Salesperson Record Exists		
In SalesLogix	In Sage MAS 500	Method
No	No	If you have not yet enabled data export, create the salesperson in Sage MAS 500; use the initial data export to export the record to SalesLogix. If you have already enabled data export, create a duplicate of the salesperson records manually in SalesLogix. After you set up the record in SalesLogix, use Maintain Salespersons in Accounts Receivable and set the CRM User ID field.
No	Yes	If you have not yet enabled data export, use the initial data export to export the record to SalesLogix. If you have already enabled data export, create a duplicate of the salespeople manually in SalesLogix. After you set up the record in SalesLogix, use Maintain Salespersons in Accounts Receivable and set the CRM User ID field.
Yes	No	Use Maintain Salespersons in Accounts Receivable to create the record for the salesperson and set the CRM User ID field.
Yes	Yes	In Maintain Salespersons in Accounts Receivable, enter the salesperson's ID in the CRM User ID field.

Data that gets exported

The only time salesperson data is exported from Sage MAS 500 to SalesLogix is when you originally set up the SalesLogix interface in Set Up CI Options. In order to have the salesperson data exported, select the Include Sage MAS 500 Salespersons in the initial CRM Data Export box when prompted.

Salesperson data is not exported during regular or manual data exports.

When not to use salesperson export

Do not export salesperson records from Sage MAS 500 if they already exist in SalesLogix. The export creates duplicate records, and would require you to find and delete the exported records manually in SalesLogix.

Setting Up Salespeople in SalesLogix

Description

After you have performed the initial SalesLogix integration, set up salespeople in SalesLogix first and then set them up in Sage MAS 500. You need the ID generated by SalesLogix for the salesperson when setting up the salesperson in Sage MAS 500. For specific instructions, see the SalesLogix documentation.

Setting Up Salespeople in Accounts Receivable

Introduction

This section shows you how to set up salespeople in Accounts Receivable to use eSalesforce. For information about setting up salespeople, see the Accounts Receivable documentation.

Prerequisites

Before setting up a salesperson for eSalesforce, set up the following:

- A Sage MAS 500 user login. The user must be configured for Windows integrated login. (See the *Installation and System Configuration* guide.)
- A record for the salesperson in SalesLogix.

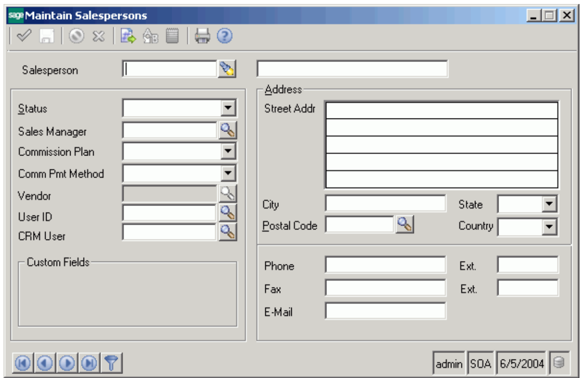
Limitation in the number of salespeople

The number of salespeople you can create in Sage MAS 500 is limited according to the terms of your license. The system displays a message when you approach the maximum number of salespeople. To add more salespersons, purchase additional licenses. See the *Installation and System Configuration* guide for more information.

Procedure

Follow these steps:

1. In Accounts Receivable, from the Maintenance menu, select Maintain Salespersons. The following window appears:



2. In the User ID field, type the salesperson's Sage MAS 500 user ID. You can also click the Lookup button and select the salesperson from a list.
3. If you are using SalesLogix integration, type the salesperson's SalesLogix user ID in the CRM User ID field. If this salesperson does not use SalesLogix, leave this field blank.
4. Complete any of the other fields as needed.
5. Click Save. The salesperson is added to Sage MAS 500 and can have access to the eSalesforce Web site.

Changing salesperson records

If you change salesperson records, note the following effects on eSalesforce:

- Changes to existing salespeople records cannot be submitted from SalesLogix to Sage MAS 500. Make the changes manually in Maintain Salespersons in Accounts Receivable.
- Only active salespeople have access to eSalesforce. When you set the status to Inactive or Deleted, the salesperson no longer has access to eSalesforce.
- If the salesperson is a primary team member of a sales team, that person's status must be active. For information about sales teams, see the next section, *Setting Up Sales Teams*.

Setting Up Sales Teams

Introduction

You can organize salespeople into sales teams. Members of a sales team can be permitted to view and process orders by any other member. This feature enables a team to serve a large customer or for a team of salespeople to serve customers in a product line or geographical area.

Primary member

Each team can have a primary member, who is usually the team's manager or supervisor.

The primary member enables you to set up teams that match the department's management hierarchy. If the primary member has a sales manager, that manager can view and process orders for the primary member's team.

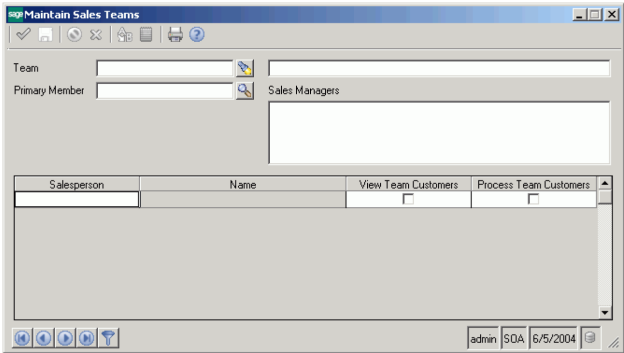
Relations to sales teams in SalesLogix

Sales teams in Accounts Receivable are not connected to sales teams in SalesLogix. Set up sales teams in both SalesLogix and Sage MAS 500.

Setup procedure

To set up sales teams, do the following in Accounts Receivable:

1. From the Maintenance menu in Accounts Receivable, select Maintain Sales Teams. The following window appears:



2. Type an identification code for the sales team in the Team field. Then, type a longer description in the field to the right of the Team field.
3. Select a primary team member. If the primary team member has a sales manager, that manager and the manager's manager, if any, appear in the Sales Manager field.
4. Add members to the team as follows:
   - Type or select a salesperson to add to the team.
   - Select whether the member can view and process customers for other team members. Put a check in a box to enable each option.
5. Click Save to accept all of the information you added to the sales team.

Viewing a list of sales teams

Run the Sales Team listing to view information about sales teams. You can generate the listing by doing either of the following:

- Click the Print button in the Maintain Sales Teams form.
- From the Reports menu in Accounts Receivable, select Other Lists and then Sales Team List.

Changing and deleting sales teams

Use the Maintain Sales Teams form to change the membership of a sales teams or delete it.

Select a sales team from the Team field. You can add or remove members and save the changes. To delete a team, click the Delete button.

Note: Deleting a sales team does not affect any transactional data.

Setting Up Customers

Overview

Ways to set up customers

With eSalesforce, you can create customers in the following ways:

- Enter the prospect as an account in SalesLogix. When you complete a credit application in the eSalesforce Web site, a customer record is created in Sage MAS 500.
- Enter a customer in Accounts Receivable. The next time you export data in SalesLogix and Sage MAS 500, the customer is added to SalesLogix and given an ID.

This section describes considerations for setting up customers in Accounts Receivable and how to activate customers created through the eSalesforce Web site. For more information, see the documentation for Accounts Receivable and SalesLogix documentation, and the online Help for the eSalesforce Web site.

Creating Customers in Accounts Receivable

Differences from standard Accounts Receivable procedures

Create new customers in Accounts Receivable using the same procedure shown in the *Accounts Receivable* guide and online Help, with the following exceptions:

- Provide a primary sales contact. Complete the Primary Contact section in the Main tab. Click Other Contacts to add additional contacts. This information is exported to SalesLogix at the next scheduled time.
- On the Sales Order tab, select an option in the Closest Warehouse field. A warehouse is required in this field.

CRM ID field

The CRM ID field on the Maintain Customers form is filled automatically the next time data is exported from Sage MAS 500 to SalesLogix.

Activating Customers Created from the Web Site

Initial state of customers created from the Web site

When a salesperson generates a credit application from a prospect, a customer record is created in Accounts Receivable with the following defaults:

- Credit limit: 0.00
- Use Credit Limit option: Selected
- Closest Warehouse: As configured in Set Up SO Options.

Approving customers

To enable a customer to place orders, do the following:

- Type the approved credit limit, or select a customer class to use the defaults for that type of customer.
- On the Sales Order tab, change the warehouse in the Closest Warehouse field if you need to use a warehouse other than the default.

The settings are reflected in SalesLogix the next time you export data.

E-mail notification Of credit limit change

When the credit manager changes the credit limit or customer status, an e-mail is sent to each salesperson for each address associated with the customer, if the e-mail features are enabled.

To set up e-mail for use in Sage MAS 500, see the *Sage MAS 500 Utilities* guide.

Changing eSalesforce Settings

Overview

Introduction

This section describes settings that you can change and view for eSalesforce. These include:

- Viewing and changing the eSalesforce Web site settings.
- Undoing SalesLogix integration.

Viewing and Changing the Web Site

Introduction

Like eCustomer, eSalesforce has a Web Site Maintenance page that shows the Web site settings and enables you to select the processing company and put a message in the status bar. You must open and set this page to activate the eSalesforce site. Also use this page if there are problems with processing or to add a message to the status bar.

You can open the page either remotely from a browser or from the Web server.

Procedure

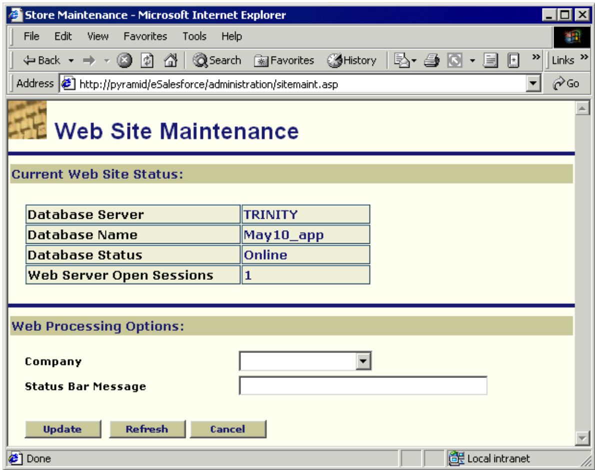
To use the Web Site Maintenance page, do the following:

1. Do either of the following:
   - To launch the page from the Web server: From the Windows Start menu, select Programs, then Sage MAS 500 Internet Applications, then eSalesforce, and then eSalesforce Site Maintenance.
   - From Internet Explorer: Open the following Web page:

     http://*server*/*folder*/administration/sitemaint.asp

Where *server* is the Web server and *folder* is where the eSalesforce Web components are installed. See *Determining the URL* on page 34 for an explanation of how the address of the site is determined.

The following Web page appears.



2 Select the company. The Web site supports only one company at a time.

3 In the Status Bar Message field, type a message of up to 128 characters. Because this message is not saved in the database, it should not be used for long-term messaging.

4 Click Update to make the change.

When changes take effect

If there are people using the Web site when you make changes, they will see and use the new settings as they refresh data in the browser and process information.

Undoing SalesLogix Integration

Introduction

To end SalesLogix integration, select None as the CRM system in Set Up CI Options. This stops the export of data from Sage MAS 500 to SalesLogix.

Situations where you would want to end SalesLogix integration are:

- To integrate with another SalesLogix database
- To end SalesLogix integration permanently

You can reestablish SalesLogix integration, but only to the same Sage MAS 500 database that you used before.

Procedure

Follow these steps to undo SalesLogix integration:

1. Make sure you have logged into Sage MAS 500 in the company integrated with SalesLogix.
2. In Common Information, from the Maintenance menu, select CI Setup, and then Set Up CI Options.
3. In the Set Up CI Options window, click the CRM Integration tab. If you did not log in as a system administrator, you are prompted to enter the SQL Server system administrator password.
4. Set the CRM System field to None. You are asked to confirm if you want to undo the integration. Click Yes.

Reestablishing integration

To reestablish integration, select SalesLogix. The system retains the settings you last used.

Resolving Issues

7

This chapter gives you suggestions on how to resolve issues if they occur with the Web site. You have a number of diagnostic tools you can use, including special pages provided with the Web site and Windows 2000 administrative tools such as Component Services and Computer Management.

In this chapter

Diagnostic Web Pages

Overview

Introduction

The eCustomer and eSalesforce Web sites have several pages that provide information about the Web site and report errors. These pages are your first source of information about Web site conditions. You can customize some of these pages to provide additional information to your customers.

Web Site Maintenance Pages

Description

The Web Site Maintenance page is the first place to look if the Web site is not working. There are Web Site Maintenance Pages for eCustomer and eSalesforce. See the following pages for information on opening them:

- eCustomer: See *Configuring the Web Site* on page 91.
- eSalesforce: See *Viewing and Changing the Web Site* on page 149.

eCustomer Web Site Maintenance page

The page for eCustomer site shows the following:

Field	Description
Server	The SQL Server to which the Web site is attached.
Database	The Sage MAS 500 Internet application database used by the Web site.
Open Sessions	The number of people using the Web site.

Field	Description
Unprocessable Sales Orders	The number of transactions in the queue that have not completed processing. (For more information, see *Processing Orders in Queues* on page 163.)

You can also use this page to open the site if it is closed or resume processing. See *Configuring the Web Site* on page 91 for instructions on opening and using the page.

eSalesforce Web Site Maintenance page

The page for eCustomer site shows the following:

Field	Description
Database Server	The SQL Server to which the Web site is attached.
Database Name	The Sage MAS 500 Internet application database used by the Web site.
Database Status	Whether the database connection is online or offline.
Web Server Open Sessions	The number of people using the Web site.

Customizing Error Message Pages

Changes that can be made

You can customize the pages that appear when an HTML error or eCustomer or eSalesforce-specific error occurs. The changes you can make include the following:

- Add a company logo and name.
- Provide more descriptive information about the error. For an authorization error page, you can add that you need a login and password to enter the site and describe who to contact to get them.

- Provide contact information customers can use to get help. You can include a phone number and generic e-mail address.

These are described in the following sections.

eCustomer-specific error message pages

eCustomer has the following error message pages that indicate conditions of the site. These pages are located in the eCustomer Common folder:

- BrowserError.htm: Indicates that the customer is trying to view the eCustomer Web site with a browser that is not supported.
- SiteNotConfigured.htm: Indicates that the Web site is not configured for a company in the Sage MAS 500 database.
- StoreClosed.htm: Indicates that the store is closed. See *Managing the Site* on page 93 for information.

eSalesforce-specific error message pages

eSalesforce has the following error message pages. These are located in the eSalesforce Common folder:

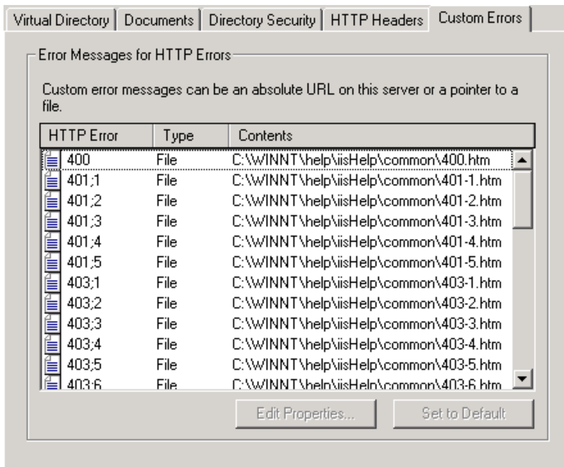
- AccessDenied.htm: Indicates that the salesperson does not have access rights to use the Web site. Make sure that the salesperson has been properly set up as shown in *Setting Up Salespeople* on page 140.
- Error.htm: Indicates that eCustomer has not been set up and configured, if you are using it with eSalesforce.
- SiteNotConfigured.htm: Indicates that the eSalesforce Web site has not been set up correctly and cannot be opened.

Customizing HTML error message pages

To customize HTML error messages and pages, run Internet Services Manager. You should be knowledgeable about HTML errors and what causes them.

Do the following:

1. From the Windows Start menu, select Programs, Administrative Tools, and then Internet Services Manager.
2. In the Tree pane, expand the server name, and then Default Web Site. Look for the name you assigned to the eCustomer Web site.
3. Right-click on the eCustomer Web site name. From the menu that appears, select Properties. In the Properties window, click Custom Errors. The following figure shows the Custom Errors tab.



4. Double-click on the error you want to change. A properties window for the error opens. You can change the attributes to have the Web server display the default text, open an error page, or jump to another URL if the error occurs.

5 To make an error page appear, specify the location of the page on the Web server. Normally, the error page files are located in C:\Windows\help\iisHelp\common.

You can edit the error pages in Visual InterDev or any HTML editing tool. Add the information, links, and images you want and save the file. Make sure that the Internet Services Manager refers to that page if the error occurs.

Troubleshooting Issues

Overview

Introduction

This section shows how to use the diagnostic tools to resolve issues.

Viewing System Messages

Introduction

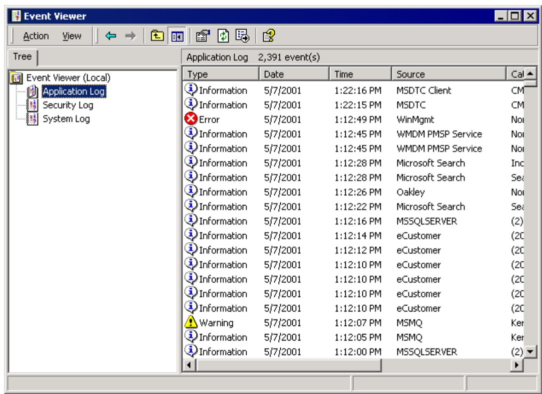
The Event Viewer lists activity that occurred on the system, including system and error messages. If there is an error in using the Web site, use Event Viewer to see the details.

Procedure

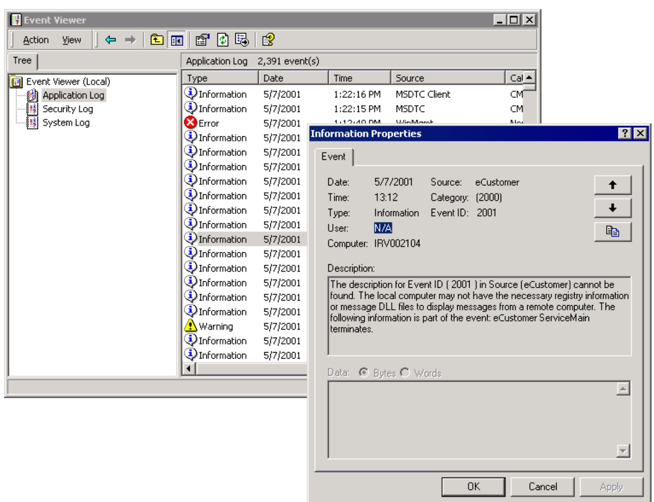
To view system events, follow these steps:

1. You can either start Event Viewer directly, or you can view system events from the Component Services window. Start the Event Viewer by doing either of the following:
   - To see events in the Components Services window: From the Windows Start menu, select Programs, then Administrative Tools, and then Components Services. In the Component Services window, look for “Event Viewer (Local)” near the bottom of the Tree pane. Expand the folder for Event Viewer to see the type of events listed.
   - To open the Event Viewer directly: From the Windows Start menu, select Programs, Administrative Tools, and then Event Viewer.

2 Click Application to view the events related to the Internet Applications. The following figure shows an example of system messages.



3 To view details about an item in the Event Viewer, double-click it to open the Event Properties window.



Processing Sales Orders with Errors

Introduction

When customers generate sales orders from the eCustomer Web site, they are saved in a staging area in the Internet application database. If the order does not have errors, it updates the system immediately and is removed from the staging area. If the sales order has errors, it remains in the staging area.

You can identify sales orders with errors from Sage MAS 500 by using the Import Sales Order task in Sales Order. Then, you can either correct the sales orders and try processing them again or purge them.

Errors that can be corrected

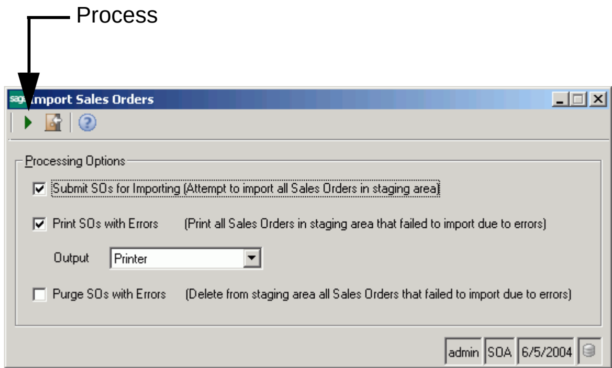
If a sales order has an error, it might be from one of the following reasons:

- The data was entered incorrectly at the Web site, such as the buyer left off a quantity. The buyer should correct the sales order at the Web site. If the buyer cannot correct the sales order, purge it from Sage MAS 500 and either have the buyer reenter the order or try to recreate it yourself from Sage MAS 500 based on the information from the error report.
- A change was made to Sage MAS 500 so that the order is invalid, such as removing an item from inventory or deleting a ship-to address. You need to correct the problem in Sage MAS 500 and then attempt to process the order again.

Procedure for sales orders with errors

Follow these steps:

1 In Sales Order, click the Activities menu button. From the menu that appears, select SO Utilities, and then Import Sales Orders. The following window appears:



2 Run a report of errors first. Make sure that *only* the Print SO with Errors box has a check. Clear checks from the other boxes. In the Output field, select whether you want to send the report directly to a printer or display it in a preview window. Click Process.

3 Correct the conditions that cause the errors, such as replacing a unit of measurement or item that was removed. Then, in the Import Sales Orders window, put a checks in the Submit SOs for Importing and Print SO with Errors boxes and click Process.

Sales orders that no longer have errors are updated in the system and removed from the staging area. The report runs after the system attempts to update the database. Any sales orders that could not be updated appear on the report.

4 To purge sales orders with errors, put a check in the Purge SOs with Errors box *only* and click Process. All sales orders with errors are removed from the staging area and cannot be recovered.

Requirement for ProcessWebSOUser

Introduction

ProcessWebSOUser is a Sage MAS 500 user assigned to all sales orders as they are populated in the application database. The system requires a valid Sage MAS 500 user ID in order to add transactions to the database.

Recreating ProcessWebSO-User

If you delete the user ProcessWebSOUser, no more sales orders can be added to the application database until the user is recreated. You can recreate the user by following the instructions in the *Installation and System Configuration* manual. Use these general steps:

1. Create ProcessWebSOUser as a user of the SQL Server where the Sage MAS 500 databases are located. You can assign any password.

   Important: Type ProcessWebSOUser in the exact case and spelling shown. If you do not type the user name exactly, the login will not work and sales orders will not be added to the application database.

2. In System Manager, use Maintain Users to make ProcessWebSOUser a Sage MAS 500 user for one of the companies. Assign it to the Public security group. This login is strictly for database access only and is not used for logging into the client.

Processing Orders in Queues

Description

If transactions are unprocessable and does not appear in the database, or if buyers are unable to view information they requested, it could be because the transactions are still in the queue. This section explains how to fix them.

How queues work

This section explains how queues are used in eCustomer. This information can help you in resolving problems with unprocessable sales orders.

The following queues are set up for eCustomer:

- A normal input queue, eapplicationprocessso, that is used for normal transaction transmission.
- Five retry queues. If the transaction fails in the normal input queue, it goes into the first retry queue. The system tries three times to process a transaction in a queue before it goes to the next retry queue. In each level of retry queue, the system waits for an increasing amount of time before attempting processing at the next level.

  The queues are numbered _0 through _4, with _0 as the first retry queue.
- A final resting queue that is used when a transaction cannot be processed in any of the retry queues. Transactions in this queue remain until they are manually moved or purged. The name of this queue ends with _deadqueue.

  The Web Site Maintenance page enables you to retry processing on transactions that are in the _deadqueue.

The following table lists how long the system keeps a transaction in a retry queue before sending it to the next retry queue:

Queue	Queue ID	Delay before retries begin (in minutes)
First retry queue	_0	1
Second retry queue	_1	2
Third retry queue	_2	4
Fourth retry queue	_3	8
Fifth retry queue	_4	16

Methods for processing transaction in the queue

If transactions are stuck in the queue, you can do either of the following to fix them:

- Retry the transactions through the Web Site Maintenance page. The COM+ applications retry processing of all eCustomer transactions in _deadqueue.
- View the queues for the COM+ applications in the Computer Management window. You can then retry or purge transactions in the queue.

Retrying unprocessable transactions

Do the following to retry unprocessable transactions through the Web Site Maintenance page:

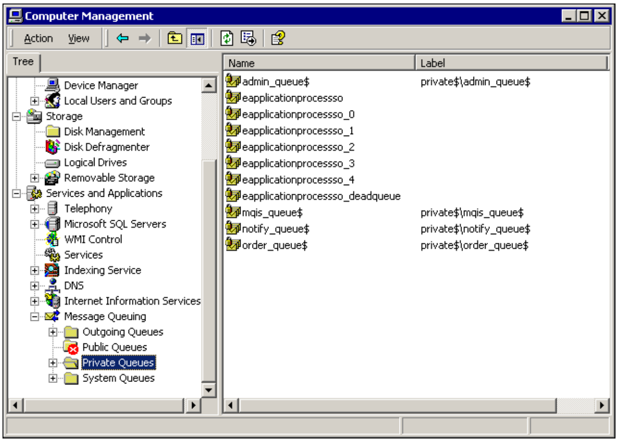
1. Open the Web Site Maintenance page as shown in *Configuring the Web Site* on page 91.
2. Look at the Unprocessable Sales Orders field to see how many transactions are in the queue.
3. Click Retry unprocessable sales orders. The COM+ applications attempt to process the transactions in the queue.
4. Refresh the page. If the COM+ applications are successful in processing the transactions, the Unprocessable Sales Orders field will indicate 0.

Procedure for viewing queues

Follow these steps:

1. From the Windows Start menu, select Programs, then Administrative Tools, and then Computer Management.
2. In the left pane, expand the listing of Services and Applications. Then, expand the folder for Message Queuing. Click Private Queues. The right pane shows

the private queues in the system, including the ones for the Internet Applications. A column shows how many transactions are still in the queue.



3 Click the queues to view information in them. Drill down to view details. You can purge all tasks in the queue as needed. For information about the queues and how to resolve problems, see the Computer Management online help.

Troubleshooting COM+ Applications

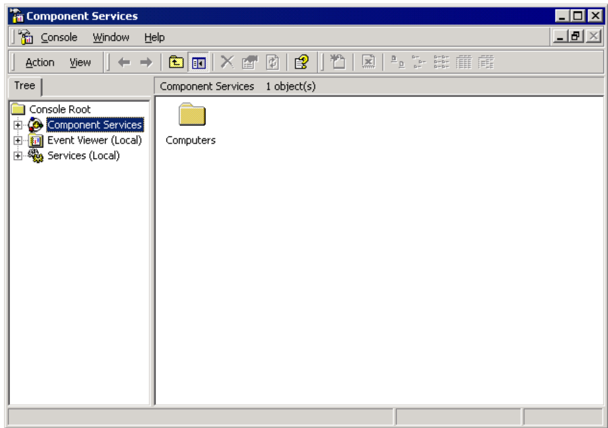
Introduction

If you have transactions in the queue, it might be caused by a COM+ application that stopped processing. Once you restart it, the transaction should finish processing and clear the queue. This section explains how to restart COM+ applications and fix them so they do not stop processing.

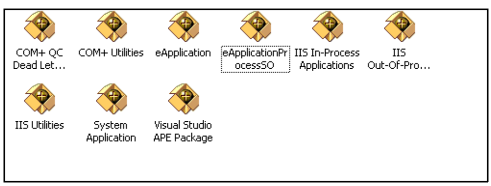
Restarting stopped COM+ applications

To restart a stopped COM+ application, do the following:

1 From the Windows Start menu, select Programs, Administrative Tools, and then Component Services. The Component Services window appears.



2 In the Tree pane, click Component Services to expand the list. Then click the Computers folder, and then My Computer. Click COM+ Applications. The COM+ applications on your system appear in the right pane as shown:



3 Notice that on some of the icons, the ball with the + symbol is rotating. This indicates that the COM+ object is active. To view the status of all the COM+ objects, from the View menu, select Status View. A column indicates whether the COM+ object is running.

4. There are two COM+ applications that directly affect order processing:
   - eApplication
   - eApplicationProcessSO
5. To restart a COM+ application, right-click on it and from the menu that appears, select Start.

Troubleshooting SalesLogix Integration

Introduction

If information in SalesLogix does not reflect changes in Sage MAS 500, check the SalesLogix integration and make sure that data is being exported from Sage MAS 500 to SalesLogix.

Checking SalesLogix integration setup

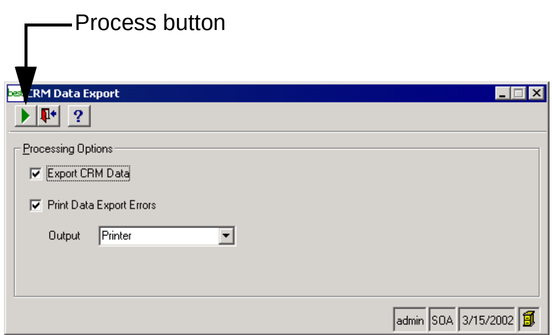
The first thing to check is the SalesLogix integration setup to make sure that it is correct. See *Setting Up SalesLogix Integration* on page 122 for instructions. If the setup is correct, perform a data export by clicking Click Export Data Now.

Viewing and correcting errors

If you encounter errors, view the error messages with the CRM Data Export window. You can then correct the errors or try exporting the data again.

Follow these steps:

1. In Common Information, click the Activities menu. Select CI Utilities and then CRM Data Export. The following window appears.



2. Run a report of CRM errors first. Make sure that *only* the Print Data Export Errors box has a check. Clear checks from the Export CRM Data box. In the Output field, select whether you want to send the report directly to a printer or display it in a preview window.

   Click Process to generate the report. For an explanation of the error messages, see the next section, *Error messages*.

3. Correct the conditions that cause the errors, such as replacing a unit of measurement or item that was removed. Then, in the CRM Data Export window, put a checks in the Export CRM Data box and click Process.

   Data that no longer has errors is exported to SalesLogix.

4. Use the Print Data Export Errors option again to make sure that there are no more errors.

Error messages

Errors that can occur from data export come from the following sources:

- Microsoft Data Access Services
- SalesLogix API
- Sage MAS 500

See the Microsoft and SalesLogix documentation for errors specific to those products. The following table describes errors from Sage MAS 500.

Message	Description
Duplicate Conversion Error	Duplicate record exists in SalesLogix for the information being exported.
SES_OPTIONS Table Not Found Options Export Failed SalesLogix Options Failed	SalesLogix integration has not been set up. See *Setting Up SalesLogix Integration* on page 122.

Message	Description
SalesLogix Connection Failure	A valid login for SalesLogix has not been entered in Set Up CI Options. See *Integration Setup in Sage MAS 500* on page 132.
Error Occured During Export	Unclassified error.

Changing Settings

Overview

Introduction

The default settings created by the installation can be changed as shown in this section. These procedures require a familiarity with Windows 2000 Server and IIS.

Changing the COM+ Login

Introduction

To change the login used for COM+ applications, set up a dedicated user and assign the user name and password to the COM+ applications. For an explanation of COM+ applications and dedicated users, see *Settings Generated Automatically by the Installation* on page 54.

Procedure

Follow these steps:

1. On the Web server, create a local administrator user. This can be a local user on the Web server or one in the domain where the Web server is located. Do the following:
   - From the Windows Start menu, select Programs, Administrative Tools, and Computer Management.
   - In the Tree pane of the Computer Management window, click Local Users and Groups.
   - In the Computer Management window, click Groups. A list of security groups appears. Right-click on Administrators. From the menu that appears, select Add to Group.

- Click Add and add the user you want to the Administrators group.

If the user does not exist on the computer or on the domain where the computer is connected, create the user. Do the following:

- Right-click on the Users folder and select New User from the menu that appears.
- Create a login and password. Make sure that the password is at least six character and is different from the user name.
- Grant the dedicated user Admin rights over COM+ applications. The user does not need rights over anything else.

2 In SQL Server, grant the user access to SQL Server and the Sage MAS 500 databases. Do the following:

- From the Windows Start menu, select Programs, Microsoft SQL Server, and Enterprise Manager.
- In the left pane, click on the SQL Server. Then, click Security.
- Right-click on Logins. From the menu that appears, select New Login.
- On the General tab, type the user's name and select either Windows authentication or SQL Server authentication.

To grant sa status to the user, on the Server Roles tab, put a check in the System Administrator box.

On the Database Access tab, put checks in the Permit box for each of the Sage MAS 500 databases. In the Database roles box for each database, put a check in the db_owner.

3 Make a note of the user's login and password so that you can enter them when you run the installation.

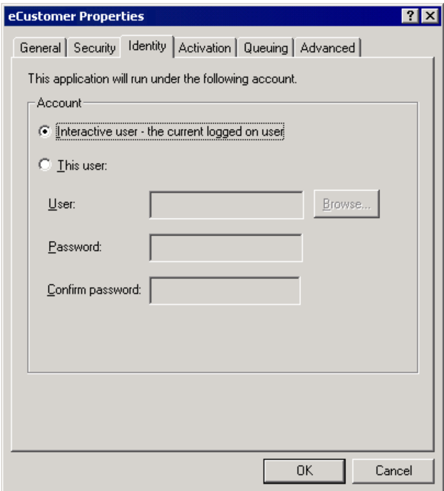
You do not need to grant access from within Sage MAS 500 as you would with any other Sage MAS 500 user.

4 Open Component Services. From the Windows Start menu, select Programs, Administrative Tools, and then Component Services.

5 In the Tree pane, expand this list for Component Services to list the Computers folder, and then My Computer. Expand My Computer and then click on COM+ Applications.

6 Right-click on the COM+ application. From the menu that appears, select Properties.

7 Click the Identity tab. The Properties window looks like this:



Select “This user.” Type the user name and password of a dedicated SQL Server and Sage MAS 500 user and click OK.

Changing the Link to the Database

Introduction

You need to configure the data link files for each of the Internet Application Web sites. For each data link file, assign the name (and password, if you use SQL Server authentication) of any user with DBO privileges for the Sage MAS 500 database.

Using Windows integrated security

If you are using a login with Windows integrated security for the data link file, do the following:

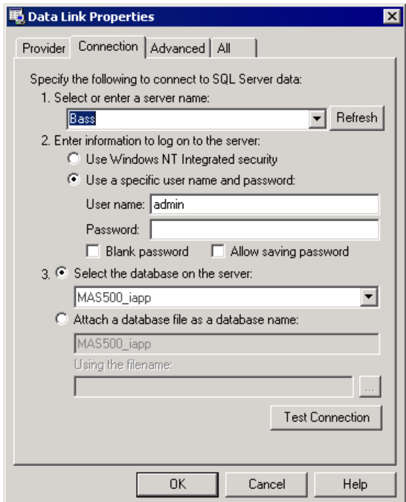
- Set up OLE DB access to the SQL Server.
- Make sure that the login is authenticated in the domain where the SQL Server is located.
- For trusted connections, use Named Pipes or Winsock.

Changing the link

To change the link, follow these steps:

1. Log into the Windows Server where the Web server is located.
2. Do either of the following to open the DataLink Properties window:
    - ► From the Windows Start menu, select Programs, then Sage MAS 500 Internet Applications, then the Web site you are configuring, and then the Data Link Configuration command.

- In Windows Explorer, locate icConn.udl in the Setup folder for the Internet Application. (For eSalesforce, the file is in C:\inetpub\wwwroot\eSalesforce\Setup.) Double-click on the file.



3 Click the Connection tab. Set the options in the Connection tab as follows:

- Under number 1, select the SQL Server where the Sage MAS 500 databases are located. If the server you need does not appear, click Refresh or type the name of the server into the field.
- Under number 2, select how you log into the SQL Server. You can use either Windows authentication or the SQL Server login of any database owner.
- To use SQL Server, select “Use a specific user name and password.” If the user has a password, enter it. If the user does not have a password, leave the Password field blank and select the box “Blank password.” In either case, select “Allow saving password.”

- To use Windows integrated security, select "Use Windows NT integrated security."
- Under number 3, select the Sage MAS 500 database for the Web site:

Internet Application	Connect to database
eCustomer	_iapp
eSalesforce, eExecutive, and eTimesheets	_app

- If the database does not appear on the list, click Refresh to the right of the server selection field.

The other tabs do not need to be changed.

4. To verify the settings, click Test Connection. A dialog box appears that indicates whether or not the connection worked.
5. Click OK. The connection to the Internet application database is established.

Changing settings

You can run the data link file at any time to change the database to which the Web site is connected. For example, you might connect to a demo database when developing the site and then connect to the production database when you are ready to go live.

If there are people using the Web site when you make changes to the data link file, they will continue to use the old settings until the application is unloaded or the data link file is reloaded. Therefore, you should have all users log out of the Web site while you make changes.

Customizing the Web Sites 8

The eCustomer and eSalesforce Web sites can be customized. This chapter provides information about how to modify the appearance of these Web sites.

This chapter briefly describes how the Web pages interact with COM+ applications to use information in the Sage MAS 500 database. However, if you want to customize how the Web site uses the databases, you need customization tools, which are available separately.

The eExecutive Web site can be customized by users. See the eExecutive documentation for information.

In this chapter

Web Site Design and Layout

Overview

Introduction

This section explains the design and format of the eCustomer and eSalesforce Web sites and the tools used to develop them so that you can decide how to customize the Web pages.

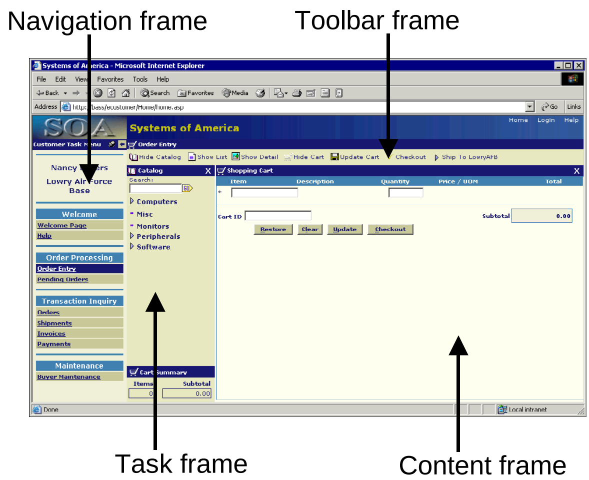
Requirements for customizing sites

Before using the information in this section, you should have knowledge in developing and editing Web pages with HTML, Active Server Pages, and cascading style sheets (CSS).

eCustomer Standard Page Layout

Description

Pages in the eCustomer Web site use a frameset with menus, contents, and navigational controls. The following figure shows the frames:



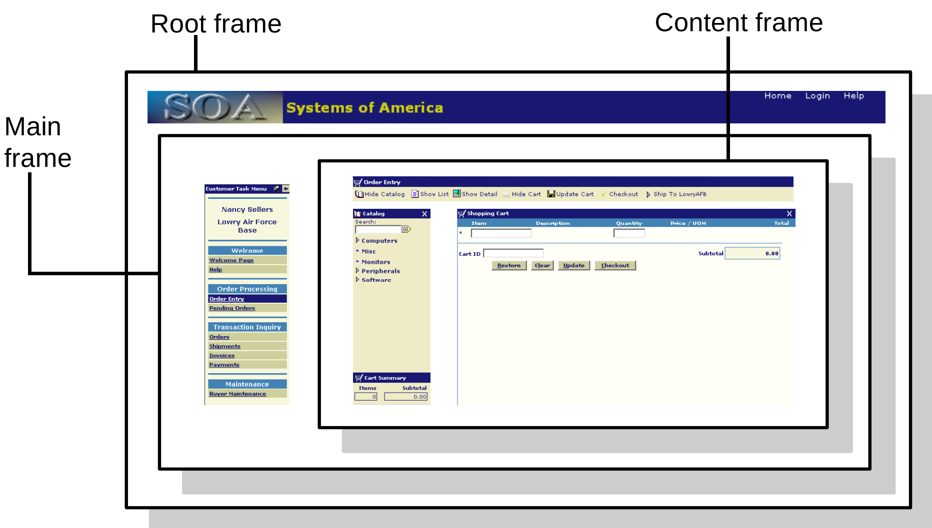
Navigation frame The navigation frame provides links to important pages of the Web site. It also contains the company name and logo.

Toolbar frame The toolbar frame contains buttons that perform certain functions, such as displaying, hiding, and updating information in the task or content frame.

Task frame The task frame contains navigation controls specific to the material in the content frame.

Content frame The content frame shows the results of the tasks performed from the task or toolbar frame. Depending on the function, the content frame might contain additional nested frames.

Nesting of frames The following figure shows how the frames are nested within each other according to the HTML coding of the main frame.

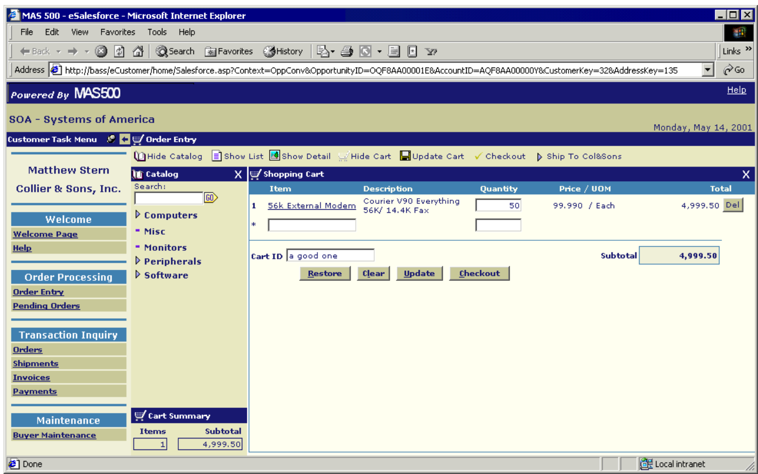


Recommendation on customizing layout

It is recommended that you keep the User Login branch of the Web site in its default layout. If you want to make significant changes to the layout of these pages, you need information about how data is drawn from the COM+ applications. You should also plan for substantial development and testing time.

Appearance when launched from eSalesforce

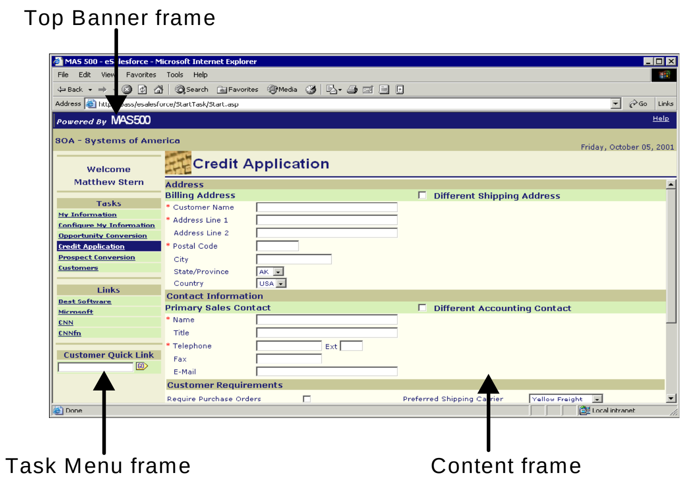
When users launch the eCustomer Web site directly, it appears as shown on page 178. When salespeople launch the eCustomer site from eSalesforce, the eCustomer site uses the stylesheets for eSalesforce. The Navigation frame changes slightly to show just the company name and not the logo.



eSalesforce Standard Page Layout

Layout

The layout for eSalesforce is similar to eCustomer. It is divided into frames as shown in the following figure:



Stylesheets and Themes

Introduction to themes

The appearance of each Web site is set by a theme. You can change the appearance of the site by changing the theme as a whole or modifying individual cascading stylesheets.

Stylesheets

The eCustomer and eSalesforce Web sites have the following stylesheets. These are located in the Theme\CSS folder:

- Main.css contains master styles that apply throughout the site.
- Individual pages have CSS files that apply to that particular page.

Most pages in the Web site refer to both the main and a page-specific stylesheet. These are declared in the page source as shown in the following example:

<link REL="stylesheet" TYPE="text/css" HREF="../Themes/Main.css">
<link REL="stylesheet" TYPE="text/css" HREF="../Themes/Navigation.css">

The page-specific CSS file is declared last so that the styles override those in Main.css.

If you are just using the global Web site styles, you only need to link to the Main.css stylesheet. If you are planning to create styles that are specific to the page you are creating, create a separate CSS file for that page. Do not add or modify styles in Main.css because the changes will affect all pages on your site.

Cascading stylesheet rules

The eCustomer and eSalesforce Web sites follow standard HTML cascading stylesheet rules. The page-specific stylesheet (in this case, Navigation.css) overrides styles in Main.css. If there are inline formats in the HTML or Active Server Pages file, those override the settings in both stylesheets.

Avoiding inline styles

The pages in the Web sites, as installed, do not use inline styles. Change formats only by modifying the stylesheets and do not apply formats manually to the pages. This makes it easier for you to make future format changes to the Web site.

eCustomer and eSalesforce stylesheets

The eCustomer and eSalesforce stylesheets are separate and not interchangeable. Each set of stylesheets needs to be in the Themes folder for their Web site.

Images

Location of site images

Buttons, icons, backgrounds, logos, and other graphics used by the Web site are in the Images folder. The Images folder does not include images of items sold through the Web site. For more information about item images, see *Adding Images and Descriptions to an Item* on page 107.

The eCustomer and eSalesforce Web sites each have a separate Images folder. Link only to files in the Images folder for the site. If you have a graphic in the eCustomer site that you want to use on the eSalesforce site, copy the file to the Images folder for eSalesforce.

Graphic formats

The graphics provided with the Web site are basic GIF and JPG files that you can edit in any graphics editor that supports these formats. You can add animated GIFs and other graphic formats supported by Internet Explorer.

Requirements for graphics

Note the following as you customize graphics:

- Note the color depth and resolution of the graphic. If you modify an existing graphic, retain the same color depth and resolution, if possible. Saving the graphic with different settings might affect the image quality and possibly change the size.
- Keep the graphic at the same size, if possible. If you need to change the size of a graphic, you might also need to change the settings on the pages and frameset.
- Keep the graphics in the Images folder. The Web pages are written to look for graphics in that folder. If you change the folder or add subfolders, adjust the references to the graphics on your pages.
- Test the Web site with the new graphics. Make sure that all the graphics are visible. Consider looking at the site with different numbers of colors.
- Make sure you have legal rights to all graphics you use.

Graphics of upgraded sites

If you are upgrading an existing eCustomer or eSalesforce Web site, note the following issues regarding graphics:

- The locations of the Web page folders will change when you upgrade. Update any specific folder references made in your Web pages.
- If you have graphics or text that refer to the former name of Sage Software, remove them or edit them to reflect the correct company name.

Customization Techniques

Overview

Introduction

This section provides general guidelines and techniques for customizing the eCustomer and eSalesforce Web sites. It is assumed that you know how to write Active Server and HTML pages and use Visual InterDev. If you have questions, see the Visual InterDev documentation and books on Active Server Pages and HTML.

Making extensive changes

If you make more extensive changes than those shown here, make them on a copy of the original Web site and plan on extensive development and testing time.

Use of Visual InterDev

Recommendation for Visual InterDev

The eCustomer and eSalesforce Web sites were originally designed with Microsoft Visual InterDev provided with Visual Studio 6.0. It is strongly recommended that you use this tool to customize the Web sites. See the Visual InterDev documentation for instructions on using the software.

Setting up sites as Visual InterDev projects

You can set up each of the Web sites as Visual InterDev projects to make them easier for you to manage and update. You first need to install Server Extensions on the site in order to open it as a Web project in Visual InterDev. Follow these steps to apply the extensions and open the site as a project:

1. From the Windows Start menu, select Programs, Administrative Tools, and then Internet Services Manager.
2. In the Tree pane, expand the list for the Web server, and then the list for Default Web Site.

3 Right-click on a Web site. From the menu that appears, select All Tasks, and then Configure Server Extensions. The New Subweb Wizard appears. Complete the questions in the wizard. When you are finished, close Internet Services Manager.

4 Import the project into Visual InterDev by doing the following:

   - Start Visual InterDev. The New Project wizard starts automatically. If it does not, select New from the File menu.
   - In the New tab, select New Web Project. Follow the instructions in the window to assign a name and location to the site.
   - When prompted, select the server where the eCustomer or eSalesforce Web site is located. It is recommended you use Local mode so that changes do not affect the Web site until you are ready to send the new files to the server. Click Next to continue.
   - To specify the Web site, select “Connect to an existing Web application on” and then select the eCustomer or eSalesforce Web site. If you do not see the Web site in the Name field, apply the Server Extensions to it. Cancel the wizard and repeat step 3.
   - Click Finish to start importing the Web site. If you are prompted to install the Visual InterDev Script Library, click Yes.

5 Repeat steps 3 and 4 for the other Web site.

Customizing How Databases Communicate with Pages

Introduction

The Active Server Pages communicate with the COM+ applications to retrieve data from and send it to the Sage MAS 500 databases. These pages do not communicate directly with the databases.

Use of COM+ components and JScript

When the Active Server Pages draw data from COM+ applications to render on a Web page, they use JScript that calls classes in the stylesheet to determine how the data appears. This is how each line of a list of items appears in alternating shades and is highlighted when you move the mouse over it.

Making extensive customizations

To make more extensive customizations in how the Active Server Pages use data, use the AVT. The AVT contains information about Sage MAS 500 database tables and how to customize databases as needed. To customize the COM+ applications to change what information is retrieved from and sent to the databases, see Sage Software for information about source code availability.

Use extreme caution in customizing Active Server Pages and COM+ applications to change how the Web site uses data. Errors in programming can render the Web site unusable and possibly corrupt the databases. Always develop customizations on backups of the Web site and databases and verify that they work before using them on production data.

Site Customization

Overview

Introduction

The eCustomer and eSalesforce Web sites can be customized to fit your existing Web site and use your company fonts and color scheme.

This section describes the customizations that can be performed on the site. Unless noted otherwise, this information applies to both eCustomer and eSalesforce.

Required Customizations

Introduction

This section describes customizations that need to be made to the eCustomer and eSalesforce Web sites.

eSalesforce customizations

The eSalesforce Web site does not need to be customized in order for you to use it. The Web site draws the company name from the Sage MAS 500 database and displays it in the Navigation frame.

You can customize the eSalesforce Web site, but these changes are not needed before going live with the site.

eCustomer customizations

The eCustomer Web site requires some customizations before using it. These customizations are described here. There are several changes that are necessary to make your Web site ready to go online:

- Configure your existing home page or create a new one.
- Add your company logo and name.
- Add contact information.
- Change to your corporate colors and text formats.

- Change links on the home page.
- Link to your production database.

Configuring or creating a home page

You probably have a Web site of your own to which you are adding the eCustomer Web site. If so, do the following:

- Link the eCustomer Web site to your existing home page. The eCustomer Web site has a login page, LoginDirect.asp, that is designed to integrate with existing Web sites. It does not have the navigation frame and home page menu.

  Have this page open in a separate browser window. Once the user logs in, the eCustomer Web site uses a frameset that requires the whole browser window.

- Run Internet Services Manager and set the default home page for the eCustomer Web site to be the home page of your site. If buyers type the URL for the eCustomer Web site, they will go to your main home page instead. For more information, see the section about changing the default home page in *Customizing the Sample eCustomer Home Page* on page 192.

- Change the home page link on the Navigation frame to jump to your home page. See *Customizing Navigation Links* on page 194.

If you do not already have a home page, you can use the sample site provided with eCustomer to create one. For instructions, see *Customizing the Sample eCustomer Home Page* on page 192.

Adding your company logo and name

The company name and logo appear in the Navigation frame of eCustomer in Common/navigation.asp.

In the Navigation frame, the company name is derived automatically from the Sage MAS 500 database. Make sure that the company name is how you want it to appear on the Web site. See the *Installation and System Configuration* manual for instructions on entering company information.

The background color and font for the company name and buttons is determined by the stylesheet navigation.css. You can change the background color or use a graphic. Make sure that the text color contrasts with the background so that it is visible.

The company logo is provided by logo.jpg. Replace this file with one containing your company's logo, but keep the new graphic the same size and use the same filename. If you change the size of the graphic, you might also need to change the dimensions of the frameset. If you use a different filename, change the references to the file in navigation.asp.

If you plan to modify the sample home page to use as your company's home page, you also need to modify the home page content frame, Home/samplehomeintroduction.htm. This document provides an introduction to your site. Revise it to describe your company and highlight the features of the site.

Adding contact information

The following pages have links to the webmaster or other contact you designate at your company:

- Home page menu frame (if used): Home\samplehomemenu.htm
- Help page: Help\help.htm

You might want to set up a generic mailbox to be used as a contact point at your company, such as webmaster@yourcompany.com, instead of a specific person. This way, you do not need to change the Web site if the contact person changes. Create an e-mail link to the address you choose.

Changing to company colors and text formats

The stylesheets contain the color and text format settings. You might want to change these to match the colors and formats used by your company.

Modify the Main.css stylesheet first. This stylesheet contains the basic formats that apply to all pages. Then, look at the Web site as a whole and see what changes need to be applied to the stylesheets of individual pages.

Note the following in making decisions on colors and text formats:

- If you want to change fonts, consider using the standard Windows Web fonts, such as Verdana, Arial, and Times. Provide alternate font choices if the user does not have the font of your choice available.
- Test the colors at different color depths. If the user is running the system at a low number of colors, such as 256, there might be palette collisions that affect the appearance of your site.

Linking to your production database

When you are ready to go live with the Web site, connect the site to your production Internet application database. Run icConn.udl in the Setup folder to change the connection. See *Changing the Link to the Database* on page 174 for instructions. Make sure that you set up a login that has access to the SQL Server and database.

Customizing the Sample eCustomer Home Page

Introduction

The section applies only to eCustomer.

The sample eCustomer home page can be modified so that you can use it as the home page for your Web site. This section explains changes that you can make to the content and operation of the site.

How the home page opens

The default sample home page for the eCustomer Web site is default.asp. This page is designed to check for proper configuration and the correct version of the browser as it opens:

- If the Web site is not configured for a company on the Sage MAS 500 databases, it opens SiteNotConfigured.htm to indicate the error.
- If the Web site does not open in the correct browser or version, it opens BrowserError.htm to indicate the error.
- If the Web site is configured correctly, it opens Home.asp that contains the sample home page.

Changing links on the home page menu

The home page menu frame, Home\samplehomemenu.htm, can be used to provide links to pages you add to your site, such as pages for support, company news, and other information. By default, the text is not linked. Revise the text, add links to the pages you need, and remove the sample text and table cells you do not need. Reserve one link as an e-mail link to your contact as shown in *Adding contact information* on page 191.

The frame where the home page menu appears is designed to scroll, so you can add a long list of links. You might consider creating an expanding and contracting table of contents to manage the contents and enable them to fit on the screen. There are a number of sample scripts available on the Internet for producing this type of table of contents.

Changing the default home page

To change IIS to call a different home page, do the following:

1. From the Windows Start menu, select Programs, Administrative Tools, and then Internet Services Manager.
2. In the Tree pane, expand the server name, and then Default Web Site. Look for the name you assigned to the eCustomer Web site.
3. Right-click on the eCustomer Web site name. From the menu that appears, select Properties. In the Properties window that appears, click Documents.
4. In the Documents tab, make sure that Enabled Default Document is checked. Add the new home page you want. In the Document tab, there are several alternate pages that can be open if the default page is not available. The pages are opened in the order they are listed on the tab. Make sure the pages are in the order you want.

Adding Other Pages

Suggestions for adding pages

When adding pages to the Web site, make sure they are consistent with the overall appearance of the Web site. The following are suggestions on how to design new pages for the site.

- Use Main.css as your stylesheet. If you need to create styles specific to the page, use one of the other page-specific stylesheets that apply or create a new one. Avoid using inline styles.
- If you are creating a page off the home page, have the page hosted in the main frame of Home\samplehome.htm. This maintains the design of the page and keeps the menu and navigation frames open at all times.

- Add links to new pages to the home page menu frame. Avoid adding links to the Navigation frame because it is designed to hold only a few key links. If you need to change the settings of the navigation frame, see the next section, *Customizing Navigation Links*.

Customizing Navigation Links

Introduction

The eCustomer and eSalesforce Web site pages have navigation links at the top. Both sites have a link to the help file. eCustomer has two other links, one to the login page and another to the home page.

You can customize the links for either site, but the method of changing the links is different. Follow the instructions that apply to the Web site.

Restrictions on customizing the navigation frame

Because of the limited amount of space, restrict the number of links on the navigation frame. However, you can add more buttons as needed.

Changing the links in eSalesforce

eSalesforce has only one navigation link to Help. The link is located in the top banner file, Common\TopBanner.asp. It is a standard HTML link within a table:

```
<td class="Help">

<a href="../Help/Help.htm" title="Help"
target="fraContent">Help</a>  

</td>
```

You can change the link to another file and add more links within the same table cell.

Changing the links in eCustomer

The navigation frame has links and text that are drawn from the Internet application database. This enables you to create a single Web site for different companies and provide different common links for different companies. For example, you might have a different home page for each company.

To change the text and links that appear in the navigation frame, modify the ticIappNavBarBtn table in the Internet application database. Use SQL Server Enterprise Manager or other SQL Server database tool.

> **Important:** At least one of the links must be to the login page. You can either use the Login.asp, which contains the navigation frame in a frame, or LoginDirect.asp, which does not. If you link to Login.asp, see this section about linking to this page.

The following lists the columns in the table:

Column name	Description	What to enter
IappNavBarBtnKey	Key field that identifies the link.	A unique number for each link.
BtnNo	The order of the links in the navigation frame from left to right.	A unique number for each link. Links are listed in order from lowest to highest.
BtnText	Text that appears on the navigation frame to identify buttons.	Name of the link.
CompanyID	ID of the company that uses the link. Navigator links are company-specific.	Company ID.

Column name	Description	What to enter
Hyperlink	Address of the page opened by the link.	Correct file name and path. Relative paths are recommended, such as “Home/ Home.hlp.”
Target	Where the page will open, which can be a frame in the same window, or a separate window.	A frame in the active frameset or an HTML code to indicate how the page opens. For example, SageMain opens in the "SageMain" frame, or "_window" opens the page in a separate window.
ToolTipText	Text that appears when the mouse hovers over the link.	Add brief, but descriptive text. For example, enter “Log in to place orders” for the Login window.
UseCurrWindow	Whether the page is opened in the current window.	0: No 1: Yes
Visible	Whether the link is visible on the page.	0: No 1: Yes

Customizing Help

Forms of user assistance

The eCustomer and eSalesforce Web sites provide the following forms of user assistance:

- Help pages that explain how the Web site works.
- Tooltips that appear when you leave the mouse pointer over a button or certain links for a few seconds.

You can change any of the provided online user assistance or add more help pages. Before customizing help, you should be aware of principles of designing help for Web sites.

Customizing the help page

The file help.htm in the Help folder contains the help for the Web site. It is recommended that you customize the help to add your contact information.

If you want to create a new help file with a name other than help.htm, change the destination of the Help link in the Navigation frame. See *Customizing Navigation Links* on page 194.

Customizing tooltips

You can add tooltips to a button, link, or input field. The text appears when the user leaves the mouse pointer over the button or link for a moment.

To add a tooltip, type the text in the Title field in the Properties sheet for the button or link. You can also edit the code defining the button as shown in this example. The title code is in italics:

<button id="btnRestoreCart" class="clsLoudButton" *title="Restores the last saved version of the cart. This discards any changes you made since the last time you saved."* language="javascript" onclick="return btnRestoreCart_onclick()" STYLE="cursor:hand">

Adding tooltips to the links on the eCustomer navigation frame is done differently. See *Customizing Navigation Links* on page 194.

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