



## **QAD Supplier Portal (SP): Web UI Overview**

## Course Overview

- Highlights SP functions available in the Web UI
- Describes the main UI features that help provide a unique user experience

## Current Features Available in SP Web UI

- Purchase Orders (*Discrete/Spot buy POs*)
- Supplier Schedules (*Blanket POs*)
- ASNs
  - Label Printing
- Receipts
- Min/Max
- User-Defined Fields (UDFs), read only
- Consolidated Accounts

The SP Web UI features listed above are now available in the new Web UI.

## Browser Support

### Important

- The QAD Supplier Portal UI is only supported on current versions of the Chrome and Safari web browsers.
- Although you can use other web browsers, you may experience differing levels of performance and user experience.

## Setting Your Home Page

- First page you see after login is your home page
- To set a page as your home page, choose **Set Current as Home** from the user options drop-down



After you sign in, the first page you see is your home page. If this is the first time you have signed in, you will see the default home page. You can set any page to be your home page by choosing Set Current as Home from the user options drop-down.

## Menu Bar

- The SP menu bar starts with the QAD icon, located in the upper left
- Click the QAD icon to go to your home page

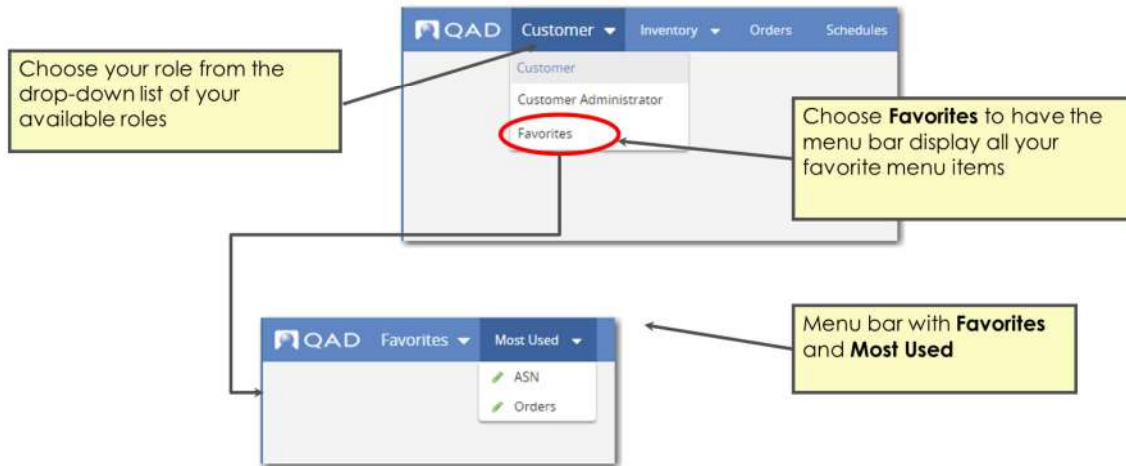


The SP menu bar starts with the QAD icon, located in the upper left. Click the QAD icon to go to your home page

When you are working in the UI going through various menus and want to go back to your home page, click the QAD icon.

When you log in, log out and then log in again, the page that opens is the last menu that you were in. Click the QAD icon to bring you back to your home page.

## Menu Bar — Roles and Favorites

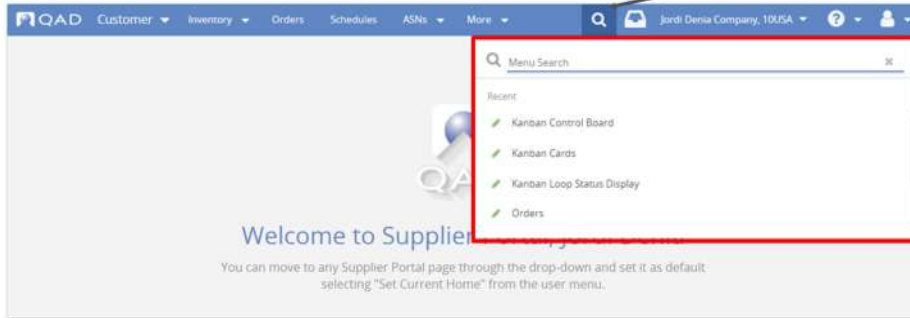


Next to the QAD icon, **Role and Favorites menu** selection.

Choose a role from the drop-down menu listing the roles available to you. Choose Favorites, located at the bottom of the drop-down menu, to have the menu bar display all your favorite menu items.

## Menu Bar — Search

Click the **Magnifying Glass** icon to open the search



Select the Menu Search icon to open the search facility. Use the menu search to find all the menu items available to you. The menu search features “type ahead” behavior so you can easily find items with similar names.

Icons indicate the menu item types, including forms, browses, and views.

You can set a menu item as a favorite directly from the listing of menu items, and see which are already favorites.



## Menu Bar — Inbox



Click on the Inbox to see your messages.

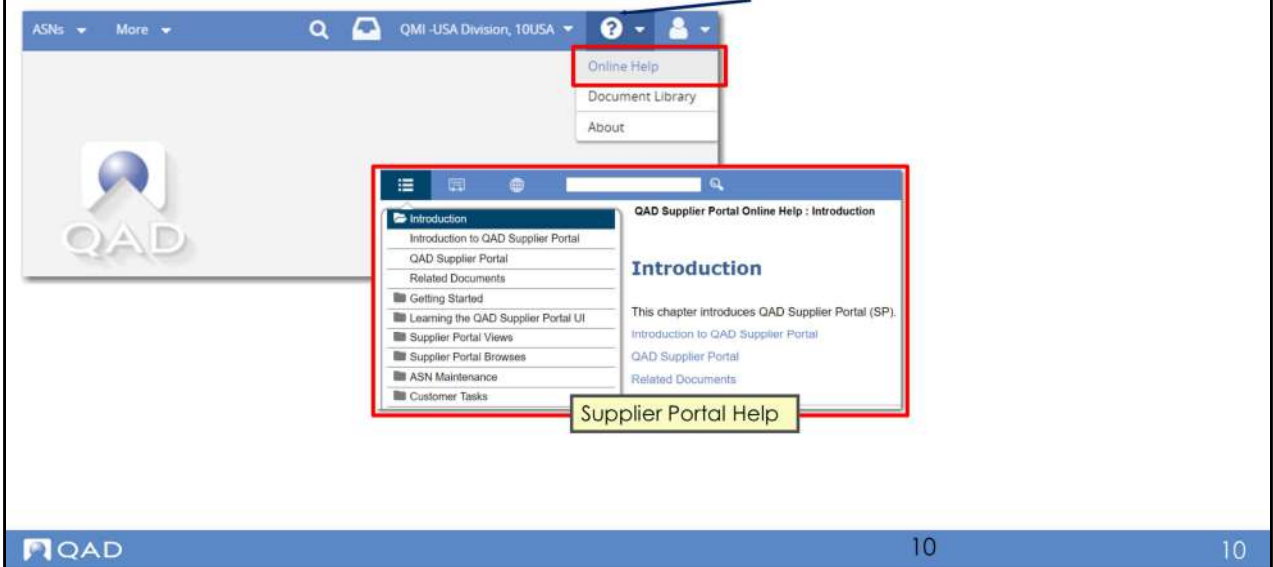
The Inbox lets you know how many new messages you have with an indicator on the icon. The messages include notification messages. Notifications indicate activity such as system events and comments from other users.

Initially, the Inbox displays a listing of your recent messages in a drop-down box. You can toggle between the Tasks and Notifications tabs and scroll within each tab to view the messages. Some notifications link to the related views for quick access. And for some notification messages, you can click Comment and enter your comments in the comment box directly.

To view all notification messages, you can go to the Extended Inbox. To go to the Extended Inbox, click View Inbox.

## Menu Bar — Online Help

Click the **Question** icon to open the help



From the help drop-down menu; you can view the online help,

## Views

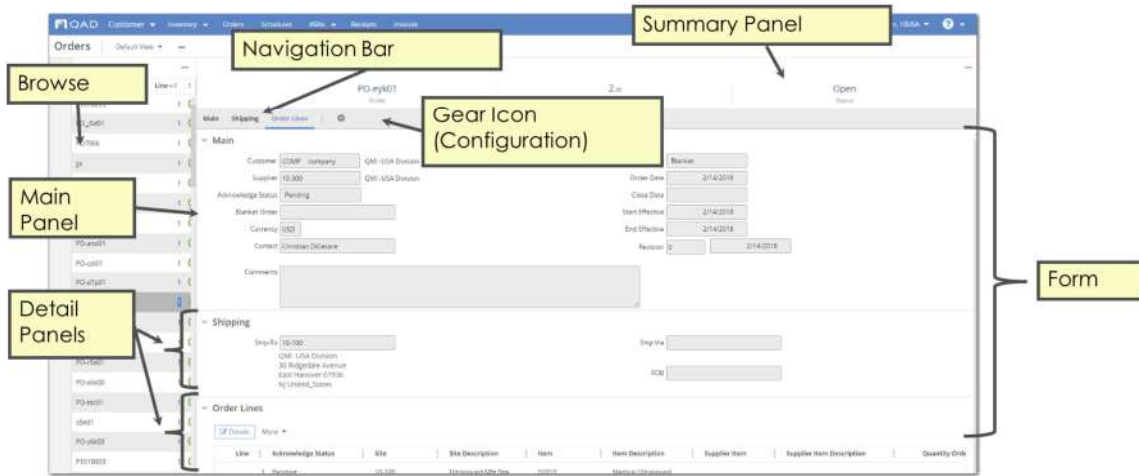
- The QAD SP Web UI offers **views** in which you can interact with the system
- Because views combine forms and browses, they are also called **hybrid views**
- A view includes:
  - A **toolbar** along the top
  - A **grid** (or **browse**), displaying a list of records
  - A **form** for completing work

The QAD SP Web UI offers views in which you can interact with the system. Because views combine forms and browses, they are also called hybrid views.

A hybrid view, or simply view, includes a toolbar along the top, a grid (or browse) displaying a list of records, and a form for completing work. The form organizes everything you need on a single page, typically starting with a summary panel at the top. Related fields and functions are grouped within panels. The navigation bar, located just below the summary panel, allows for quick access to any panel of interest. You can quickly access anything on the form by scrolling or using the navigation bar.

Some hybrid views include complete access, combining the grid with the form; other hybrid views only provide read-only access and display the grid. Hybrid views with complete access include the New and Edit buttons along the top.

## Views (Continued)



## Browsets

- When you first open a view, the browse grid displays records in rows.
- Browsets include the following features:
  - Quickly search for data or add search conditions
  - Sorting on columns
  - Paging controls along the bottom of grid display
  - Hide/show columns with configuration settings
  - Save column configurations as a stored view
  - Save search filters as stored searches

When you first open a view, the browse grid displays records in rows.  
Browsets include the following features:

- Quickly search for data or add search conditions
- Sorting on columns
- Paging controls along the bottom of the grid display
- Hide and show columns with configuration settings
- Save column configurations as part of a stored view
- Save search filters as stored searches

Selected browse grids include New and Edit buttons, indicating you can create new records and edit existing records in a form. For these, you can also edit an existing record by double-clicking on a row. Double-clicking on a row opens the form for editing the selected record.

## Browses — Searching and Filtering

The screenshot displays the QAD Supplier Portal interface for the 'Orders' section. The search criteria are defined as follows:

Field	Operator	Value
Status	equals	Open
Scheduled	equals	
Due Date	greater or equal...	

The interface includes a 'Search' button, a 'Toggle' button (labeled 'DC'), and a calendar widget for date selection. The main grid displays order details for PO101714.

### Searching and Filtering

You can filter the grid display using the Search function.

In the Search box, enter the field you are searching on, along with a condition (such as “starts at” or “greater than”), and then a string or value. For doing a quick search, just enter a string to search based on the default condition for the grid. The default field is typically a key field for the grid. You can enter as many search criteria as you need to get the display results you need.

The Toggle button lets you compare the values from two different browse columns.

Click on the drop-down icon in the Search box to add, change, or remove search conditions.

## Browsets — Group By

Click the **More (...)** icon and then **Show Group By**

Drag the column headers to group by them

Drag a column header here to group by that column

Order #	Line #	Status	Item	Ship-To	Site
P1010034	1	Open	QMI -USA Division 01040-002	10-100	10-100
P1010026	1	Open	QMI -USA Division 290578	10-100	10-100
P1010026	2	Open	QMI -USA Division 290578	10-100	10-100
P1010026	3	Open	QMI -USA Division 290578	10-100	10-100

Order #	Line #	Status	Supplier Name	Item	Ship-To	Site
P1010034	1	Open	QMI -USA Division	01040-002	10-100	10-100
P1010026	1	Open	QMI -USA Division	290578	10-100	10-100
P1010026	2	Open	QMI -USA Division	290578	10-100	10-100
P1010026	3	Open	QMI -USA Division	290578	10-100	10-100

### Group By

With the Group By feature, you can display data hierarchically based on selected columns. To use Group By on a browse grid, from the More (...) icon, select Show Group By. For Group By, all the records must be on the page. You might need to increase the records per page or apply Search filters to the browse in order to display all the records on the page. With Group By active, you can drag-and-drop column headers to group the display by the selected columns. You can then expand or collapse the groupings as needed.

**Important:** You can only apply the Group By feature to results that are listed on a single page. So, if you have two pages of results, you cannot apply Group By. The Group By feature is particularly useful in grouping data that you can analyze at a glance. If your search produces thousands of lines of results, grouping results of that size to analyze at a glance is not effective anyway.

## Browsets — Group By (Continued)

The screenshot shows the QAD Supplier Portal interface. At the top, there is a navigation bar with the QAD logo and menu items: Customer, Inventory, Orders, Schedules, ASNs, and More. Below this is a sub-header for 'Orders' with a 'Default View' dropdown and an 'Open' button. A search bar contains filters for 'Status = "Open"' and 'Scheduled = "no"', with a 'Search' button. A dropdown menu is open, showing 'Item' selected and circled in red. Below the search bar is a table with columns: Order, Line, Status, Supplier Name, Item, Ship-To, and Site. The table content is grouped by item, with expandable rows for 'Item: 01010 (18)', 'Item: 01011 (9)', 'Item: 01012 (15)', 'Item: 01013 (6)', and 'Item: 01020 (2)'. A yellow callout box points to the table with the text 'Orders view, grouped by Item'. The QAD logo and the number '16' are visible in the bottom blue bar.

The Orders browse with the data grouped by item.



## Browsets — Group By, Summation Symbol

The screenshot shows a web interface for 'Schedules' with a filter bar containing: 'Release Status = "Active"', 'Schedule Type = "Shipping"', 'Prior Net Required Quantity > "0.0"', 'Ship Date < Today', 'Line # "999"', and 'Supplier = "200070"'. Below the filters is a 'Release' button. The table header includes columns: 'Supplier Name', 'Site', 'Reference', 'UM', 'Quantity Required', and 'CUM Quantity'. The 'Quantity Required' column header has a summation symbol (Σ) next to it, which is circled in red. A callout box points to this symbol.

Displayed in integer/number columns when you use Group By

The summation symbol appears in all columns that are integers/numbers when using group by.

## Browsets — Export

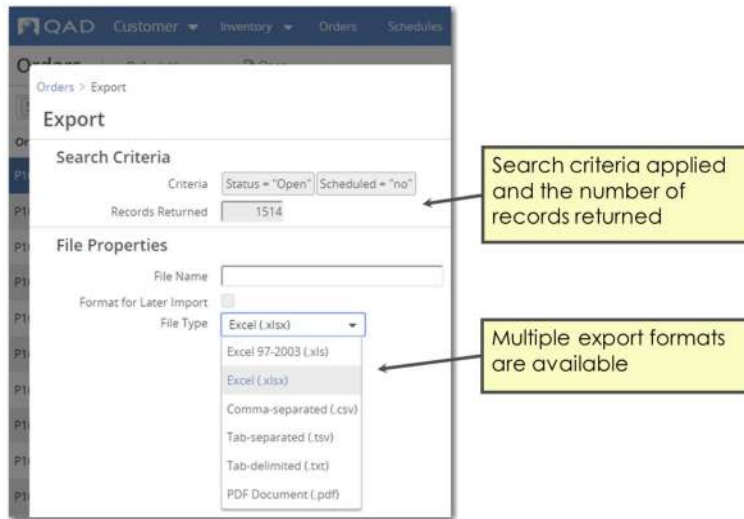
The screenshot shows the QAD Supplier Portal interface. At the top, there are navigation tabs for 'Customer', 'Inventory', 'Orders', and 'Schedules'. Below this is a search bar with filters for 'Status = "Open"' and 'Scheduled = "no"'. A table of orders is displayed with columns for Order #, Line #, Status, Item, Ship-To, Site, and Quantity Ordered. A dropdown menu is open over the first row, showing options like 'Favorite', 'Show Group By', and 'Export'. A yellow callout box with a black border points to the 'More (...)' icon and contains the text: 'Click the More (...) icon and then Export'. The 'Export' option in the dropdown is circled in red.

Order #	Line #	Status	Item	Ship-To	Site	Quantity Ordered
P1010035	1	Open	Fruit Co. 01010	10-100	10-100	1000.0
PO_5d01	1	Open	Absolute Electronics Co... 60003	10-100	10-100	2995.0
PO7006	1	Open	Bridgeville Industries 60001	10-100	10-100	300.0
jjx	1	Open	Taylor & Fulton Fruit Co. 01010	10-100	10-100	1.0
P1010016	1	Open	QMI -USA Division 01010	10-100	10-100	1.0
P1010012	1	Open	Taylor & Fulton Fruit Co. 01010	10-100	10-100	700.0
poma01	1	Open	QMI -USA Division 60090	10-100	10-100	20.0

### Export

You can export browse data to a variety of file formats. To export, from the More (...) drop-down, choose Export. In the File Properties panel, enter the file name and select the file type. Click Export.

## Browses — Export Dialog Box



You can export browse data to a variety file formats, including:

- Excel (.xlsx)
- Excel 97 - 2003 (.xls)
- Comma-separated values (.csv)
- Tab-separated values (.tsv)
- Tab-delimited values (.txt)
- Portable Document Format (PDF) (.pdf)

To export, from the More ( ... ) drop-down, choose Export. In the modal dialog, the Search Criteria panel shows any browse search criteria that you have applied, along with the number of records returned. In the File Properties panel, enter the file name and select the file type. If you would like to export the data to Excel, make some changes, and then the re-import data from Excel, select the Format for Later Import option. When you format the data for later import, the data is exported to Excel in a format that is based on the Business Component data structure, which can be different than the browse column order. In Excel, the order of the columns might not match the order of the columns in the browse grid you are currently working with in the QAD Web UI.

## Browsets — Configuring Columns

Click the **Gear** icon

Select the columns that you want to display and click **Apply**

Cum Quantity	
000.0	4500
000.0	1200
000.0	4500
000.0	4000
0.0	
000.0	8000
000.0	5000
000.0	5000

Configure Columns

- Order
- Line
- Status
- Customer Name
- Company
- Customer Business ID
- Supplier Name
- Supplier
- Supplier Business ID
- Item
- Item Description
- Ship-To
- Ship-To Name
- Site
- Quantity Ordered
- UM
- Quantity Received
- In-Transit Quantity

Apply

You can configure which columns to display in a browse using the Configure Columns dialog. Open the dialog by clicking on the gear icon located by the Search button, and select which columns you want the grid to display. You can save the column configuration changes as part of a stored view.

## Attachments

Click the Attachment icon

Attachments Panel

Drop-down list for an attachment

You can attach files to views to keep relevant documents together for a particular transaction. For example, you can attach spreadsheets, Word documents, and PDFs to an order. To attach a file, you can drag the attachment to the attachments drop area, or click Upload to select the attachments. Right-click on the attachment to delete the attachment, view its properties, or download it.

## Drill-Down Links



Selected views, such as Orders, include the drill-down links feature. By clicking on the Link icon located on the right side of the view, you can quickly access browses related to data in the currently selected record.

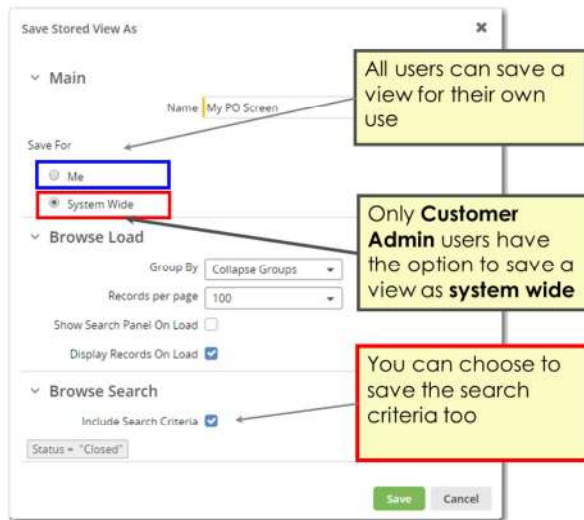
## Stored Views

The screenshot shows the QAD Supplier Portal interface. At the top, there are navigation tabs: Customer, Inventory, Orders, Schedules, ASNs, Receipts, and Invoices. The main section is titled 'Orders' and includes a search bar with the filter 'Status = "Open"'. Below the search bar is a table of orders with columns: Order #, Status, Supplier Name, Item, Ship-To, and Site. A dropdown menu is open next to the 'Default View' header, showing options: My Views, System Views, Save, Save As, Rename, and Delete. Two yellow callout boxes provide instructions: one points to the 'Default View' dropdown with the text 'Pull-down menu, next to the view title', and another points to the 'Save As' option with the text 'After you configure the view, choose Save As to store the settings'.

Order #	Status	Supplier Name	Item	Ship-To	Site
P1010035				10-100	10-100
PO_5d01				10-100	10-100
PO7006				10-100	10-100
jix		Taylor & Fulton Fruit Co.	01010	10-100	10-100
P1010016	1	QMI -USA Division	01010	10-100	10-100
P1010012	1	Taylor & Fulton Fruit Co.	01010	10-100	10-100
poma01	1	QMI -USA Division	60090	10-100	10-100

You can modify a view and then save it for later use as a stored view. Aspects of a view that you can modify include the grid columns and form panels. After configuring a view, you can save it as a stored view from the drop-down located next to the view title. Once saved, a stored view is available from a pull-down menu located next to the view title. Your stored views are available to you alone.

## Saving a Stored View



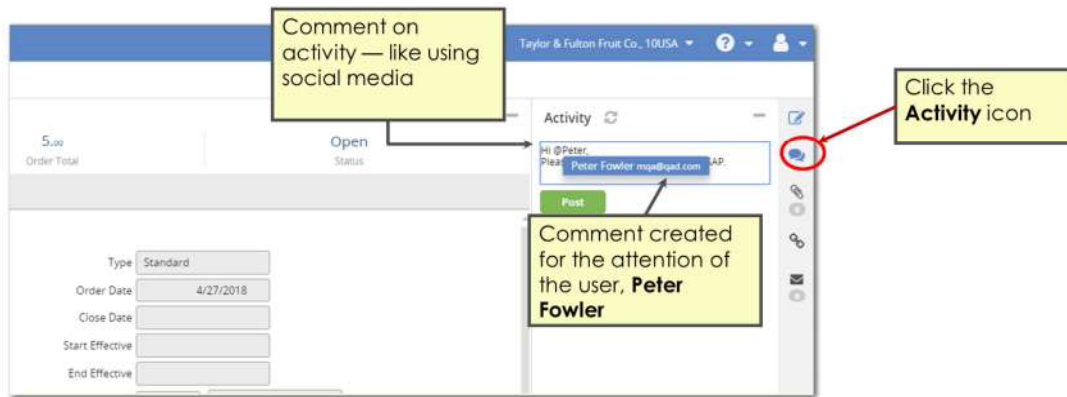
If you customize a view (by changing the sort, search, columns, or panels) and save it, the customized view will be for your use only, unless the view is saved as a system-wide view. Only Customer Admin users can save views as system wide.

Customer Admin users can tailor particular views; for example, Orders, and make those changes system wide for their suppliers and other customer users. Only Customer Admin users can edit system-wide views.

When you first access the system and open a view, the system-wide view for that screen is displayed. If there is no system-view for that screen, the QAD default view is displayed. However, when you next access a view, the last view you accessed for that screen will display, regardless of whether the view was system wide, a QAD default view, or a custom view that you created.



## Activity Panel



With the Activity panel, you can comment on activity in a way similar to how you use social media. The system can track comments, and attachment uploads for the current record and displays them in the Activity panel.

From a form, open the Activity panel on the right side of the page by clicking on the Activity icon along the right.

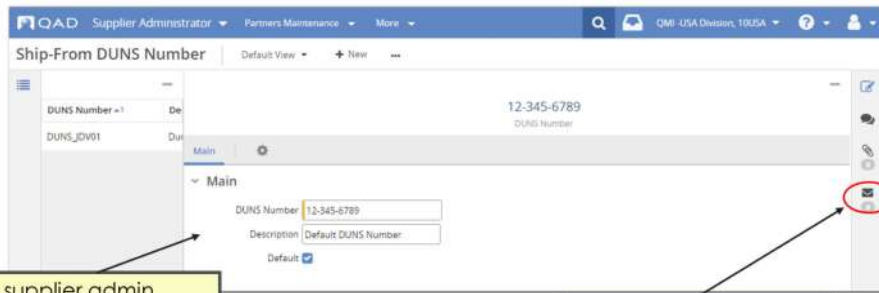
You can add comments directly to the activity feeds, and mention the names of other users in the comments by first typing the @ symbol.

## Activity Panel (Continued)



Tagged users receive Inbox notifications that they have been mentioned in a comment. They can then go directly from their Inbox notification to the form and its activity panel. They can also simply reply to the Inbox notification.

## Messages Panel



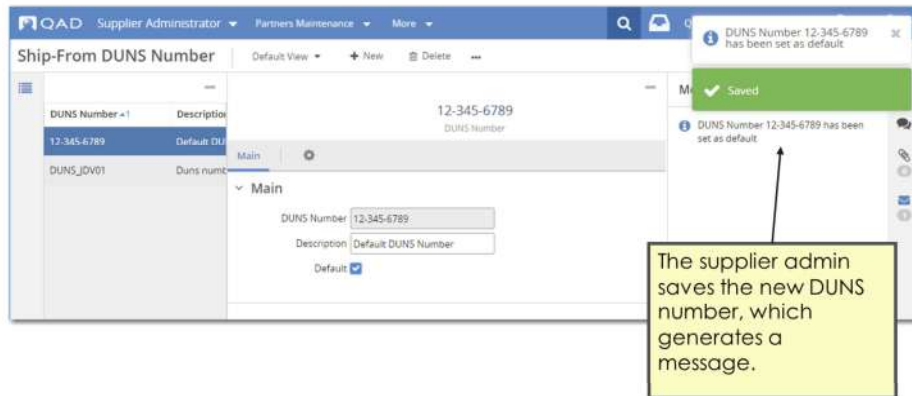
A supplier admin enters a new DUNS number and sets it as the default. The record has **not** been saved yet.

Information and warning messages are displayed in a **Messages** panel, accessed using the **Envelope** icon.

Information and warning messages provide feedback as you enter data. Information and warning messages are displayed in a Messages panel, which reduces potential distractions during data entry while improving message accessibility. While working in a form, you can quickly access the messages panel by clicking on the messages icon located on the right side of the view.

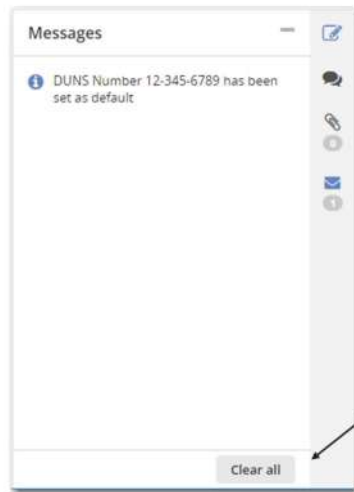
In this example, a supplier admin is creating a ship-from DUNS number and setting it as the default. There is currently no default DUNS. The record has not been saved yet.

## Messages Panel (Continued)



When the supplier admin saves the default DUNS number, a message regarding the default number is displayed in the Messages panel.

## Messages Panel (Continued)



Click **Clear All** to clear the **Messages** panel

To reduce clutter, you can clear currently displayed messages by clicking on the Clear All button, located in the lower right corner of the Messages panel. Note that error messages are displayed at the bottom of the form, in an Errors grid.



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